

Conference 4.9 Registration Quick Reference

This quick start guide outlines the basic workflow for key Registration administration and management tasks in the WingateWeb Conference system.

To complete these tasks, log in to the Conference Administrator as a user with the specified security role. When following these instructions, start a task from the menu bar at the top of the interface. When steps refer to “the left navigation bar,” choose an option in the list of links on the left of the page.

For detailed instructions, see the Conference PDF documents at <http://www.wingateweb.com/support>

To set up and manage Registration, complete these tasks:

- 1: [Setting Up Attendee Registration](#) on page 1
- 2: [Registering an Attendee](#) on page 3
- 3: [Managing Attendee Records](#) on page 3
- 4: [Running Registration Reports](#) on page 3

1: Setting Up Attendee Registration

NOTE

To complete Setup tasks, you must have a System Administrator security role on your user account.

If you will use WingateWeb Conference to manage attendee registration, complete these tasks:

General Settings

1. Set up attendee types, and assign a reporting priority.
Setup > Users > General > **Attendee Types**
 2. If you want to group attendee types for reporting purposes, assign attendee types to report groups.
Setup > Users > General > **Attendee Report Groups**
 3. If you want to report on attendees by location, set up geographic regions.
Setup > Users > General > **Geographic Regions**
 4. If you plan to import attendee data, create data import templates.
Setup > General > Imports & Exports > **Data Import Templates**
 5. As necessary, create or edit user flags.
Setup > Users > General > **User Flags**
- IMPORTANT:** Consult with your WingateWeb Project Manager as you create or edit user flags.

6. Set up or edit templates for email messages sent to attendees.
Setup > General > Email Messages > **Predefined Emails**
7. If you want to standardize the company names in user records, set up standardization.
Users > Standardization > **Company**
8. As desired, create custom fields to help you track user information within the Conference Administrator, and assign the fields to custom field locations.
Setup > General > **Custom Fields**
You can display custom fields on these pages in the user record:

This user record page	Displays fields assigned to this custom field location
Contact Information	User Contact Info (Admin)
User Profile	User Profile (Admin)
Attendee Info	Attendee Info

(If you plan to use EventLink, you may want some of these fields to be used to match the user with other users, sessions, or exhibitors. For information on EventLink setup, see [EventLink](#) on page 2.)

Search & Reporting Preferences

1. If desired, set up search preferences for user searches.
Setup > General > Search Preferences > **User Search Prefs**
2. If desired, set up reporting fields for user custom reports.
Setup > Reports > Preferences > **User Reporting Fields**

Registration

1. Create registration package groups.
Setup > Users > Registration > **Reg Package Groups**
2. Set up system options and registration options.
Setup > Users > Registration > **Reg Setup Wizard**, then choose **Reg Options**.
IMPORTANT: Consult with your WingateWeb Project Manager as you set up or edit these options.
3. Set up support information, cancellation information, and payment instructions.
Setup > Users > Registration > **Reg Setup Wizard**, then choose **Reg Inventory**.
4. Create registration packages.
Setup > Users > Registration > **Reg Setup Wizard**, then choose **Reg Inventory** and choose the **Registration Packages** sub-tab.
5. Create registration paths for different registration experiences.
Setup > Users > Registration > **Reg Setup Wizard**, then choose **Create Reg Paths**.
6. As desired, configure advanced settings for the custom fields added to registration paths.
Setup > General > **Custom Fields**
For example, a custom field can be configured so that it displays only if the user chooses a certain response at a previous field.

Registration Codes

Registration codes provide a detailed way to track different attendee types, provide different prices or discounts, assign profile values, etc.

1. Set up registration code groups.
Setup > Users > Registration Codes > **Reg Code Groups**
2. Set up registration codes.
Setup > Users > Registration Codes > **Reg Codes**

Hotels

If you will use WingateWeb Conference to manage attendee hotel reservations, complete these tasks:

1. Set up hotel preferences.
Setup > Users > Hotels > **Hotel Preferences**
2. Set up hotels, then modify the hotel to assign a primary contact.
Setup > Users > Hotels > **Hotels**
3. Set up hotel blocks.
Setup > Users > Hotels > **Hotels Blocks**, click the Setup drop-down menu
4. Set up hotel sub-blocks.
Setup > Users > Hotels > **Sub-Blocks**
5. Organize sub-blocks in a hierarchy (used if an attendee is eligible for more than one sub-block).
Setup > Users > Hotels > **Sub-Block Hierarchy**
6. If you plan to use master-billing:
 - Create custom fields used in the rules, and assign them to the **Hotel Rules** custom field location.
Setup > General > **Custom Fields**
 - Create the rules.
Setup > Users > Hotels > **Master-Bill Rules**
7. Set up hotel passkey preferences.
Setup > Users > Hotels > **Passkey Preferences**

IMPORTANT: Consult with your WingateWeb Project Manager as you set up or edit passkey preferences.

EventLink

1. Set up custom fields that display when users create their EventLink user account. (Some of these fields may be the same ones you choose to display during attendee Registration.)

Setup > General > **Custom Fields**

You can display custom fields on these pages in EventLink:

This EventLink account page	Displays fields assigned to this custom field location
Person	EventLink Create Account
Profile Information	EventLink User Profile
Interests	EventLink Interests
Messaging Preferences	EventLink Messaging Preferences

Also, if you plan to create private EventLink groups, setup custom fields that may be used to identify private group members. Add the fields to this custom field location:

EventLink Group Constraints

2. Set up rules to allow or deny access to EventLink.
Setup > Users > Login Rules > **EventLink Login Rules**
3. Choose EventLink preferences.
Setup > General > EventLink > **EventLink Preferences**
4. If desired, create EventLink groups.
Setup > General > EventLink > **EventLink Groups**

Advanced Registration Setup

IMPORTANT

Consult with your WingateWeb Project Manager as you set up or edit advanced settings. Also, be aware that some settings are used also for exhibitor payments.

1. Set up revenue preferences.
Setup > Users > Registration > **Revenue Preferences**
2. Set up the payment processor.
Setup > Users > Payments > **Payment Processor**
3. As necessary, edit payment states.
Setup > Users > Payments > **Payment States**
4. If you want to allow users to pay for registration with a voucher, set up vouchers.
Setup > Users > Payments > **Vouchers**

On-Site Check In and Badging

IMPORTANT

Consult with your WingateWeb Project Manager as you set up on-site features. WingateWeb will set up some on-site settings for you.

1. Submit your badge specification to WingateWeb.
2. If the event will have multiple badge designs, set up badge types.
Setup > Users > On-site > **Badges**, and then choose **Badge Types** on the left navigation bar.
3. With your Project Manager, decide the rules that govern check in activities.
Setup > Users > On-site > **Check In**, and then choose **Checkin Rules** on the left navigation bar.
4. Indicate whether the attendee's payment must be accepted before the badge can be printed at check in.
Setup > Users > On-site > **Check In**, and then choose **Check In Prefs** on the left navigation bar.
5. If you will use WingateWeb Conference manage on-site distribution of gifts and materials, set up gift redemption.
Setup > On-site > **Gifts & Materials**

2: Registering an Attendee

NOTE

To complete Registration tasks, you must have a System Administrator, User Administrator, or Call Center Administrator security role on your user account.

After you complete the registration setup, attendees can register using the public Registration site. As necessary, you or Call Center Staff can complete registration on behalf of a user.

1. Create the user record.
Users > **Add New User**
2. Add details to the user record.
In the user record, choose these options on the left navigation bar:
User Data > **Contact Information**
User Data > **Profile**
User Data > **Attendee Info**
3. If you are using registration codes to apply attendee types, prices, discounts, etc., assign the appropriate code to the user.
In the user record, choose Registration > **Registration Codes** on the left navigation bar.
4. If are using vouchers and this attendee has a voucher code, apply the voucher code.
In the user record, choose Registration > **Vouchers** on the left navigation bar.
5. Purchase a registration package and enter payment information.
In the user record, choose Registration > **Registration** on the left navigation bar.
6. If appropriate, reserve the attendee's hotel room and enter payment information.
In the user record, choose Hotels > **Hotel Booking** on the left navigation bar.
7. If appropriate, schedule the attendee for sessions.
In the user record, choose SCPS > **Personal Schedule** on the left navigation bar.

3: Managing Attendee Records

NOTE

To complete Management tasks, you must have a System Administrator or User Administrator security role on your user account.

You can complete these management tasks, as appropriate.

1. Create or import user records
Users > **Add New User**
OR
Users > **Import Users**

(If you are using the Nomination tool, users may also be added as nominees through that site.)
2. Search for existing user records.
Users > **Simple Search**
OR
Users > **Advanced Search**
3. Edit the attendee's user name and password, or reset the password.
In the user record, choose User Data > **Edit Login** on the left navigation bar.
4. Edit the same field on multiple user records (bulk edit).
 - Create a user worklist
Users > **Advanced Search**, and add records to the worklist
 - Access a saved worklist.
Users > **Worklist**
 - Set up the fields to edit.
In a worklist, choose the **Bulk Edit** option
5. Send an email message.
 - To an individual user
In the user record, choose Advanced > **Emails** on the left navigation bar.
 - To a group of users
In a worklist, choose the **Send Email** option

6. Update the user's purchase item or payment information.
Registration > **Registration**
OR
Registration > **Order History**
7. Transfer the user's registration and hotel order from one person to another.
In the user record, choose Registration > **Order Transfers** on the left navigation bar.

4: Running Registration Reports

1. View reports about registration, orders, refunds due, check in, gift redemption, revenue, etc.
Reports > User > **Registration Reports**
2. View reports about hotel rooms, sub-block reservations, and reservation changes.
Reports > User > **Hotel Reports**

NOTE: To view Hotel reports, you must be the primary owner of the hotel. After you run the Room List (Hotel Bookings) report for the first time, go to the Change Report and set the time so any changes after that time will be tracked.
3. View reports about registration codes and emails.
Reports > User > **Participant Reports**
4. View reports about EventLink activity, blog activity, photos, inappropriate words in group and person postings, etc.
Reports > User > **EventLink Reports**
5. Create custom reports, as desired.
Reports > **Create Custom Report**, and choose **User** as the report type.