

Conference 6.1 Registration Setup Quick Reference

This quick start guide outlines the basic workflow for key Registration setup tasks in the ActiveEvents 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 documents and online help at <http://www.wingateweb.com/support>.

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NOTE

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

1: 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 > **Import Templates**
 5. As necessary, create or edit user flags.
Setup > Users > General > **User Flags**
- IMPORTANT:** Consult with your ActiveEvents Business Analyst 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 (Admin)

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

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**

3: Registration

1. Create registration package groups.
Setup > Users > Reg Setup Wizard > **Packages**, then choose the **Registration Package Groups** sub-tab.
2. Set up registration options.
Setup > Users > Reg Setup Wizard > **Global Settings**, then choose the **Registration Options** sub-tab.
IMPORTANT: Consult with your ActiveEvents Business Analyst as you set up or edit these options.
3. Set up support information, cancellation information, and payment instructions.
Setup > Users > Reg Setup Wizard > **Global Settings**, then choose the appropriate sub-tab.
4. Create registration packages.
Setup > Users > Reg Setup Wizard > **Packages**
5. Create registration paths for different registration experiences, and set the path hierarchy.
Setup > Users > Reg Setup Wizard > **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.

4: 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**

5: Hotels

If you will use ActiveEvents 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 ActiveEvents Business Analyst as you set up or edit passkey preferences.

6: ActiveEvents Connect

1. Set up custom fields that display when users create their ActiveEvents Connect 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 Connect:

This Connect account page	Displays fields assigned to this custom field location
Account Creation	ActiveEvents Connect Create Account
Interests	ActiveEvents Connect Interests
Messaging Preferences	ActiveEvents Connect Messaging Preferences
Search Filters	ActiveEvents Connect Search

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

ActiveEvents Connect Group Constraints

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

7: Advanced Registration Setup

IMPORTANT

Consult with your ActiveEvents Business Analyst 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**

8: On-Site Check In and Badging

IMPORTANT

Consult with your ActiveEvents Business Analyst as you set up on-site features. ActiveEvents will make some on-site settings for you.

1. Submit your badge specification to ActiveEvents.
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 Business Analyst, 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 ActiveEvents Conference manage on-site distribution of gifts and materials, set up gift redemption.
Setup > On-site > **Gifts & Materials**