Adding (manually) or deleting an Attendee Record

Manually adding a contact record

If an attendee can't register online, or you need to manually add a new attendee contact record for some other reason, look for the "**+New**" button (top right).

When adding a new contact, you can use the features below:

Duplicate contact warning

If you're manually adding a new contact record, EventsAir will automatically check the details and, if needed, display a list of possible duplicates in a pop up screen:

Possible Duplicate Detected

ID	LAST NAME	FIRST NAME	TITLE	ORGANIZATION	EMAIL
110	ALLEN	RYAN		Lorem	ALLEN.RYAN@fakemail.net
95	ALLEN	HANNAH		Lorem	ALLEN.HANNAH@fakemail....
87	ALLEN	HARRY		Lorem	ALLEN.HARRY@fakemail.net
111	ALLEN	RACHEL		Lorem	ALLEN.RACHEL@fakemail.net

Cancel   Select

If one of the displayed duplicates is a possible match, you can select that duplicate record and review/modify/update as required.
If it's not a duplicate, (for example, if two attendees happen to have the same surname), just close the pop-up and return to adding the contact.
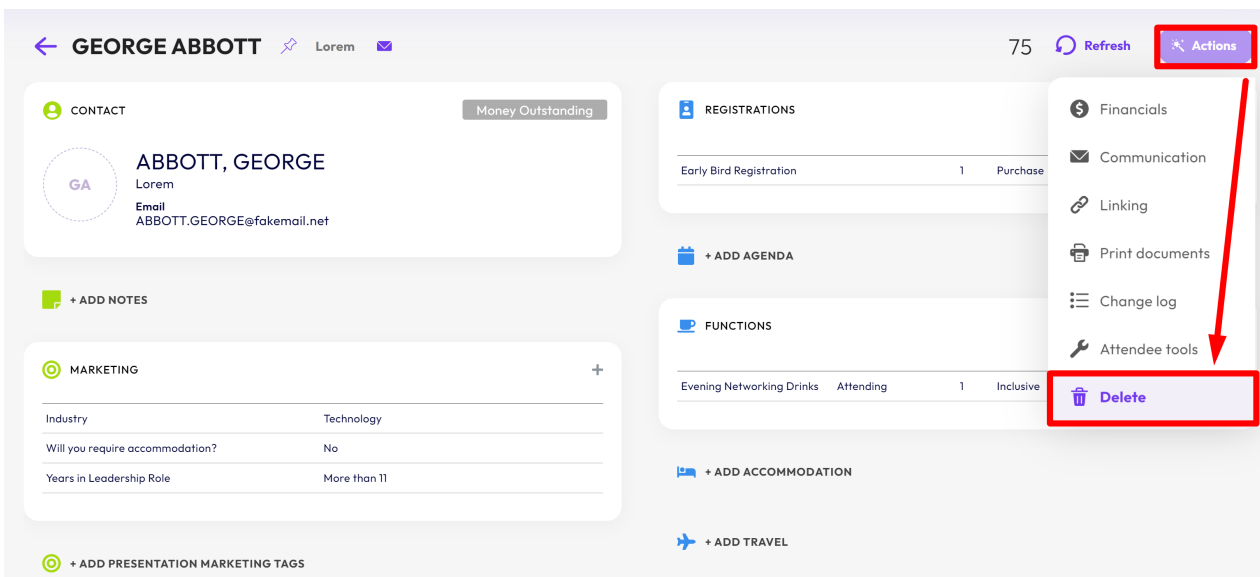
'Auto-copy from organization' tool

When you're manually adding a new contact, EventsAir will automatically check for organizations with the same name. If any are found, you'll see a popup screen with a list of possible matches. If one of the displayed organizations is correct for the new record you're adding, you can select it and all organization details (name, address, etc.) will automatically be added to your new contact.
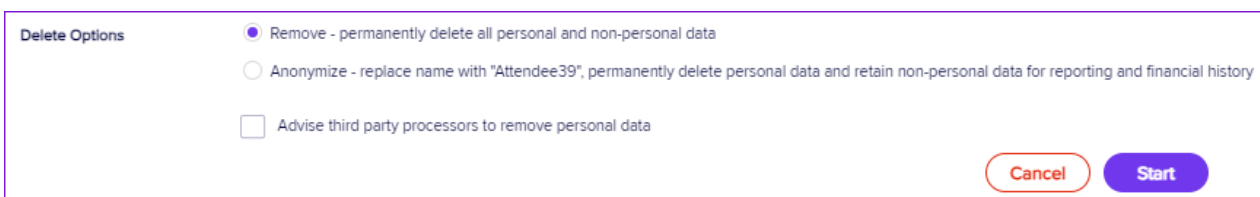
Auto Copy from Organization

ORGANIZATION	ADDRESS	CITY	STATE	COUNTRY
My Other Company				
My Company				

Cancel   Select
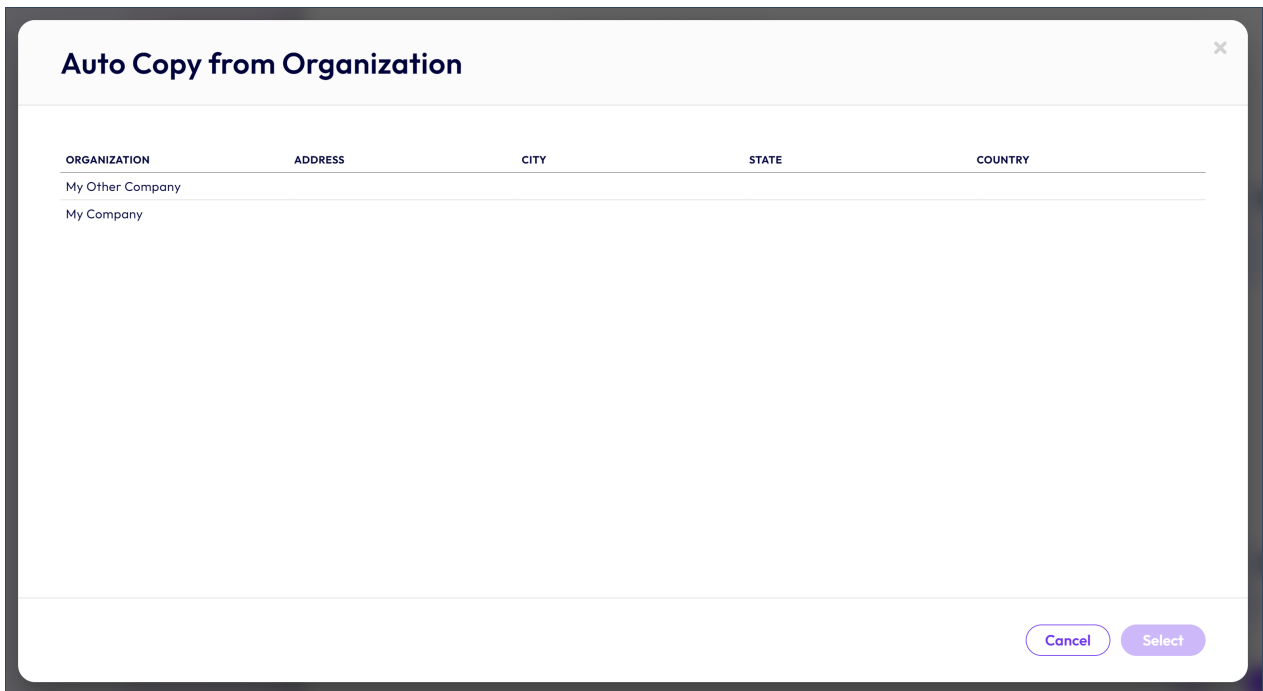
Deleting or anonymizing a contact

Attendee Delete is an Action Tool that allows you to either completely remove a contact record, or anonymize it.

Why is there more than one option?

Delete Options

- ● Remove - permanently delete all personal and non-personal data
- ○ Anonymize - replace name with "Attendee39", permanently delete personal data and retain non-personal data for reporting and financial history

☐ Advise third party processors to remove personal data

Cancel   Start

You have the option to:

- **Remove**

or

- **Anonymize**

You also have the option to advise any third party processors to remove data.

There are many regulations (such as GDPR) that require Data Processors (anyone who collects or uses personal data, such as event planners handling attendee registrations) to follow specific regulations when handling this personal information.

As an event organizer, you may receive a request to delete, remove, or "forget" the personal data of attendees. You're required to comply with these requests but most regulations also recognize you may need to retain certain information such as taxes collected, payments made, registration details, etc.

Removing a record will permanently delete all data associated with that record, which you can't do if there are any outstanding financial transactions on the record. These must be either canceled or reconciled first. It's also common practice to never remove records which include transactions, even if they've been canceled or paid. This is why you may choose to anonymize a record instead of removing it, as it encrypts the identifiable data while leaving the record accessible for reporting.

How does each option work?

Remove will completely remove that record, deleting all data relating to that attendee from EventsAir. **This can only be used when there are no outstanding refunds or financial transactions requiring processing on the attendee's record. You will need to cancel these first.**

> **NOTE:** Before removing an attendee who is part of a group, you first need to ensure they're completely unlinked from the group. You will also need to unlink any contact records that have been created as function guests of this person, if applicable. (Read more on unlinking in the article about processing refunds.)

Anonymize will encrypt the name, email, and phone number of the contact, deleting all other fields containing personal data on their record. These records remain in the database for financial, tax and other historical data reporting purposes. However, **only Data Administrators** may search for these records by the encrypted name, email or phone number. All other users may search by record ID and other fields that don't contain personal data.

> **NOTE:** Once you Delete or Anonymize a contact record, the process is permanent and cannot be undone.

Delete Contact

✕

You are about to permanently Remove GEORGE ABBOTT
(ID: 75) from the database.

Enter "DELETE" to confirm

[   ]

Delete   **Don't Delete**   **Cancel**

Advise Third Party Processors to remove Personal Data

Part of EventsAir's Data Protection Toolkit is the ability to monitor all third parties' access to personal data from EventsAir. These parties may be hotel partners, service vendors (such as caterers or tour operators), ecommerce providers, your client, or other external parties.

Any time a third party accesses a Quick Report or Quick Export that has been marked as private, that instance is logged in the Data Processing Log.

If an attendee requests that you anonymize or delete their contact record in EventsAir, you can choose to notify all third parties who accessed reports or exports containing that contact's personal data.

You can request that they delete or anonymize any data they have received from EventsAir. These instructions you give will be completely reliant on your organization's data privacy processes.

THERE ARE SEVERAL PLACES WHERE YOU NEED TO SET THIS UP BEFOREHAND:

You need to set up the email in **Application Setup** under **Offices >> Data Consent and Data Log Settings.**

You need to ensure the event is attached to the Office where you've set this up, and confirm or edit this in **Event >> Data Consent** and **Data Log Settings.**

You can only create an event attached to an Office if your user type is allowed to access that office (or there's only one office).