Confirmation Merge Docs

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A Confirmation Merge Doc allows you to personalize emails to attendees by including details from their record (such as which sessions or functions they've registered for). Creating Confirmation Merge Docs in EventsAir is a very straightforward process, and uses the drag-and-drop EventsAir Builder, so it's just like building an Interactive Site. Creating your Merge Doc ahead of time makes it easy to re-use it in multiple situations, such as:

- **Automatically** sending a confirmation whenever an attendee completes their registration
- **Individually** sending a confirmation after you manually register an attendee
- **Scheduling communications** to be sent out at a particular time, or on a recurring basis

Components in the Merge Doc Builder

- **Data Processing Consent** – inserts your Data Protection Policy Statements, then lets you collect a Consent (and/or Withdrawal of Consent) to provide personal data for event registration
- **Attendee App & OnAIR Visibility** – inserts the Policy Statement followed by the choice to Opt-In or Opt-Out of displaying contact details in Attendee Search, Function Table Allocation and EventStream
- **Contact Details** – lets you define which contact fields (e.g. Name & Address details) will be displayed in the Merge Doc
- **Dietary Requirements** – displays dietary requests submitted by the attendee
- **Note Details** – inserts text from Notes you collected during the registration process
- **Marketing Details** – inserts text from Marketing details you collected during the registration process
- **Registration Details** – inserts text from the attendee's Registration module
- **Agenda Session Details** – inserts agenda items from the attendee's record
- **Agenda Activity/Breaks Details** – inserts Activity and Break information from the attendee's record
- **Function Details** – inserts text from the attendee's Function module
- **Accommodation Details** – inserts text from the attendee's Accommodation bookings
- **Travel Details** – inserts text from the attendee's Travel bookings
- **Speaker Presentation Details** – inserts text from Speaker and Presentation details, where the attendee is the presenter/speaker
- **Session Role Details** – inserts Presentation details for attendees marked with any Session Role (e.g. Chairperson) in a Session
- **Reviewer Details** – inserts text from Presentation details for any paper this person is reviewing
- **Exhibition Details** – inserts text from Exhibition bookings for this person
- **Sponsorship Details** – inserts text about the person's Sponsorship packages
- **Payment Details** – inserts the details of payments provided
- **Event Calendar** – lets you create a **Save Event Date to Calendar** link, for data compatible with Outlook and Google calendars. You are able to define the label, subject, start and end dates and times, time zones and

additional details

- **My Agenda Calendar** – lets your attendee save their specific My Agenda items to Outlook and Google calendars. You can opt to included ICS files to the email, select what agenda items to include and to select all or just future dated items.
- **Add to Wallet** – lets the attendee save their QR code to their phones Apple or Google Wallet – providing a useful scannable ID instead of a name badge
- **Contact Barcode** – inserts a 1D barcode to identify the attendee
- **Contact QR Code** – inserts a QR code to identify the attendee
- **Money Total** – inserts a total of all money owed
- **Page Break** – inserts a page break within the body of the email
- **Attachments** – lets you attach a PDF or other document to your communication
- **HTML** – lets you insert a block of HTML-formatted text and graphics
- **Text** – lets you insert plain text into your communication
- **Attach Invoice** – attaches an invoice to the communication. You will have options to exclude pending invoices, and exclude invoices when the contact has already paid in full.
- **Attach Receipt** – attaches a receipt to the communication
- **Attach Personalized Doc** – allows you to attach reports found in the Contact Print section of an attendee's record (e.g. Certificates of Attendance, Itineraries etc.)
- **Attach Custom Field Document** – any Custom fields of type Document, for Contacts or any sub-modules, can be attached to this Merge Doc

> **Tip**: Pressing **Save** will save your changes and close the Builder. Pressing **Save & Preview** will leave the Builder open, and open the Doc in the HTML Viewer window to see how your changes look.

Confirmation Merge Docs Are Device Responsive

EventsAir employs a unique architecture that is optimized for a wide variety of devices. Fonts and spacing are automatically adjusted for maximum readability, whether your attendees are viewing the email on their PC, smart phone, or tablet.

About Merge Fields

You can use the "Insert Merge Field" to personalize information within an HTML component of a Merge Doc. This can include fields such as name, organization name, region etc. and other fields unique to that attendee such as their personal Attendee App PIN.

About Auto Login Tokens

An Auto Login Token is a short line of code inserted at the end of a hyperlink. This turns the standard link into a personalized link, opening an Interactive Site or Portal with the contact details and other relevant information prepopulated.

Auto Login Tokens can be used in both Confirmation Merge Docs and Marketing Merge Docs. For more information, read this article about using Auto Login Tokens.

Testing Your Merge Doc

It's always a good idea to send a test communication to check exactly what your communication will look like to the recipient.

Press the **Send Test Email** button (at the bottom of the screen), fill in the From & To fields, and press **Send Now**.

Step-by-Step Guide: Confirmation Merge Doc Creation

Click here to see how to build a Confirmation Merge Doc.