

# Group Allocation Portal

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The Group Allocation Portal allows Group Contacts to manage their group inventory and register additional members.

The Group Allocation Portal lets a Group Contact:

- See group inventories for Registrations, Functions, Accommodation and Travel
- Add, import and invite new group members
- Assign inventory items to group members
- Send confirmation emails to group members
- Cancel group members
- See group reports

## Setting up the Group Allocation Portal

### Details

As for all apps/portals, you need to set up a name, Alias (URL), brand, live dates, and messaging for before and after the app is live. [Read this article for more information.](#)

### Localization

#### Changing the wording in the app/portal

Changes made to the default language in Application Settings will affect all events. However, you can still make unique local changes for each portal in each event in the Portal Setup. [Read more about Localization.](#)

### Content Tab

- **Login** – edit the label and add any additional text
- **Home** – edit the label and add any additional text
- **Group Inventory** – edit the label and add any additional text. You can also choose to display the amount of inventory by checking the required box

- **Group Members**– edit the label and add any additional text. You can also:
  - Assign an Interactive Site to be used for New Group Member Registrations
  - Assign a Merge Doc to be used for confirm Group Member Details
  - Assign a Merge Doc to be used for Group Member Confirmations
- **Import Group Members** – edit the label and add any additional text
- **Invite Group Member** – edit the label and add any additional text. You can also enter the email details and registration site for inviting a new person to register for the group
- **Invoices and Payments** – edit the label and add any additional text. You can also assign an Interactive Site to be used for collecting payments, and you can choose to disable this function by checking the appropriate check box.
- **Reports** – edit the label and add any additional text. You can also choose which Quick Reports you wish to make available in the portal.
- **Exports** – edit the label and add any additional text. You can also choose which Quick Exports you wish to make available in the portal.

## Using the Group Allocation Portal

Once given the Portal URL (or QR Code), any group member can access the portal using their email address and password.

## Home Page

The home page can display a welcome message, and any other basic information required.

## Group Inventory Page

This page displays a matrix of availability and costs for:

- Registration Group Inventory
- Function Group Inventory
- Accommodation Group Inventory (option to view allocated or unallocated rooms)
- Travel Group Inventory

## Group Members Page

This page offers a variety of tools and functions to let Group Contacts manage the members of their group. Options include:

- **Add New Group Member** – displays an Interactive Form for adding the details of a new group member
- **Import Group Members** – allows Group Contacts to:
  - Download a group member template to use for importing new group members
  - Upload the completed group member template file

- Review uploaded group member details
- After review, approve addition of these new members
- **Filter View of Group Members** (with option to show canceled bookings)
- **View the list of current group members** – includes indicators if already booked for group inventory of registration, functions, accommodation or travel
- **Actions** – this dropdown gives a set of options for any selected group members (from the list above)
  - Register for the event
  - Assign one or more functions
  - Book into group room block
  - Book for group travel
  - Send confirmation email
  - Cancel the group member

## Invoices and Payments

This page allows group contacts to see any invoices or credit notices for the record. If a payment page is linked in the setup, the group contact can also pay any outstanding registration, accommodation, travel, etc. items.

## Reports Page

This page displays a list of available Quick Reports.

## Exports Page

This page displays a list of available Quick Exports.

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