Attendee management – Overview

Last Modified on 12/10/2024 12:48 am EST

The default view of the Attendees Panel is the list of your attendees:

> The new–look EventsAir Version 16 has arrived! If your version of EventsAir hasn't yet been updated, you may see something more like the below.

> When you first click on the Attendees Panel, you'll see a blank record screen, with sections for **Contact** details and other modules.
>
> Once you add or search for an attendee, their record will open. When you return to the Attendee Panel after working elsewhere in your event, you'll see the record for the attendee you looked at most recently.

Sections of the Attendees Panel

You can find an attendee (via the Search,

or using the Recent and Pinned Records section), to see an individual attendee's information.

Within each attendee's record, you can manually manage and edit their contact details, and all the information about what they've selected or been added to within various modules: **Registration**, **Accommodation**, **Travel** and more.

If this particular attendee is also involved in other aspects of your event, such as **Presentations** (they're a speaker, or reviewer); **Exhibitions**, **Sponsorship**, **CE course**s etc., then you can also see (and usually add or edit) bookings, information, payments, and more for this attendee for those modules.

Read more about working within modules on an attendee record (Contact, Notes, Marketing, Communications, Registrations, Agenda, Functions, Accommodation, Travel; and possibly also Presentations, Sponsorship, and CE Courses/CE Credits).

- **Recent and Pinned Records** – whenever you're working on a record, it will appear in the Recent list on the left side of the screen, in the order selected. You can also "pin" a record to the Pinned section. While viewing a record, if you click on the **Pin Icon** to the right of the Attendee name, you'll create a "pinned" record. This will appear in the Pinned list, to the left of your Attendee Panel, so you can quickly access it later.
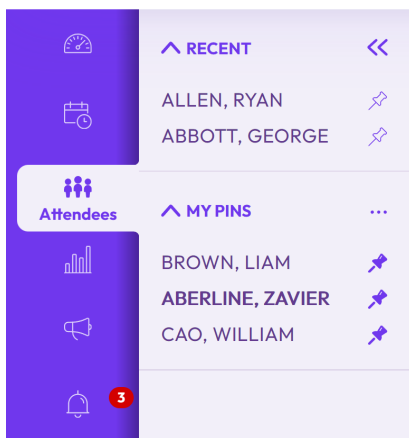
The new-look EventsAir Version 16 has arrived! If your version of EventsAir hasn't yet been updated, you may see something more like the below.
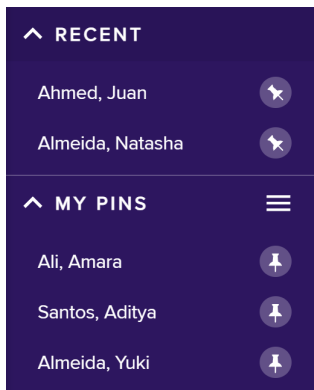
- **Scrolling Records** – once you've created your first search, attendee records are displayed. To quickly flip through the attendee records, you can click on the forward/backward scroll buttons located on the top right of your window.
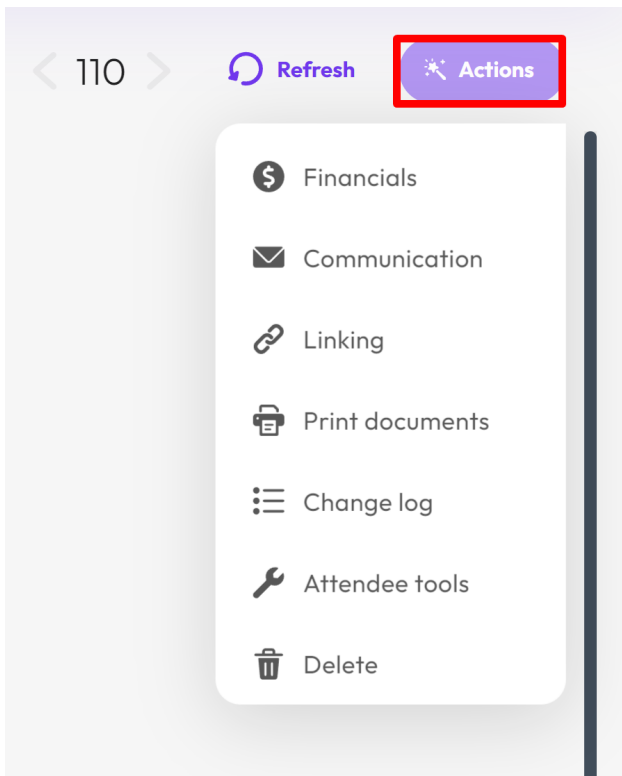
  In Version 16 and upwards, these are on either side of the attendee's ID number when you're in an attendee contact record:

- **+New [or Add Contact, pre Version 16]** – selecting this option lets you create a new attendee record directly within this panel, if they can't register online.

_____

Attendee Actions

Actions give you quick access to important tasks and features when you're managing attendees' details.
The actions menu visible from within an Attendee record are :

$ Financials	**Financials** see and process payments, refunds, invoices, receipts and more for this attendee. You can also see an audit trail of all transactions, and process miscellaneous charges and invoices. Read more about managing attendee financials.
✉ Communication	**Send communication** – create and send on-the-fly email, texts and Attendee App messages. Email messages can include plain text, HTML, and **Merge Doc** emails. Attachments and Blind Carbon Copy (BCC) functions are also supported. Read more about Communications.
🔗 Linking	**Group Linking** – you can see and link individual attendee records for Group management. Read more about managing Groups.
🖶 Print documents	**Print Personalized Documents** – lets you print documents for this contact, such as address labels, a certificate of attendance, an itinerary, pro-forma invoice etc.

☰ Change log	**Change Log** – a detailed log of all changes made to a specific record. Date, time, user, and details are all provided in cases where you need to track and see what's been changed.
🔧 Attendee tools	**Attendee Tools** – There are a variety of handy tools here, namely: Cancel Attendee (or just cancel some items); Name Badge; Online Activity Log; PDF Merge Doc; and Replace Attendee. **Read more detailed descriptions below.**
🗑 Delete	**Attendee Delete** – you can either permanently delete the selected attendee record OR anonymize it.

The new-look EventsAir Version 16 has arrived! If your version of EventsAir hasn't yet been updated, you may see something more like the below.

Action Buttons

Action buttons give you quick access to important tasks and functions when you are managing attendees' details.
The Action Buttons you can see from an Attendee Record screen are:

🔍	**Search** – quickly search across all modules and records for either one or multiple attendees. You can filter by your chosen criteria within all modules. Read more about searching and filtering.

Financials see and process payments, refunds, invoices, receipts and more for this attendee. You can also see an audit trail of all transactions, and process miscellaneous charges and invoices. Read more about managing attendee financials.

Send communication – create and send on-the-fly email, texts and Attendee App messages. Email messages can include plain text, HTML, and **Merge Doc** emails. Attachments and Blind Carbon Copy (BCC) functions are also supported.
Read more about Communications.

Group Linking – you can see and link individual attendee records for Group management.
Read more about managing Groups.

Print Personalized Documents – lets you print documents for this contact, such as address labels, a certificate of attendance, an itinerary, pro-forma invoice etc.

Change Log – a detailed log of all changes made to a specific record. Date, time, user, and details are all provided in cases where you need to track and see what's been changed.

Attendee Tools – There are a variety of handy tools here, namely: Cancel Attendee (or just cancel some items); Name Badge; Online Activity Log; PDF Merge Doc; and Replace Attendee. **Read more detailed descriptions below.**

Attendee Delete – you can either permanently delete the selected attendee record OR anonymize it.

More about Attendee Tools

Cancel Attendee

You can cancel all or just some items for this attendee, including:

- Registrations
- Functions
- Accommodation
- Travel
- CE Courses

Choose to either cancel all details, or only selected details. If you only want selected details, tick the boxes next to the items you want to cancel.

Press **Start** to Cancel.

Name Badge (individual)

This tool lets you select a Name Badge, and then create that badge for the currently selected attendee.

Choose one of your Name Badges, then press **Start** to create the badge.

Online Activity Log

This lets you see all online activity for this attendee. The log will show date, time, site details, IP address (if available) and type of online activity.

Common activity types will be Login and Submit.

PDF Merge Doc

This tool lets you select a Merge Doc, and then create a PDF document of it for the currently selected attendee.

Merge Doc – choose one of your Confirmation or Marketing Merge Docs here.

Press **Start** to create the PDF.

Replace Attendee

This tool makes it very easy to replace one attendee with another, simply by filling in the required details and clicking on Replace.

All details and payments are now associated with the new attendee, and the old attendee details are saved in a canceled record so it doesn't get reported in the current event.

Site Auto Login

Site Auto Logins are links to interactive (registration) sites, Apps or Portals that will automatically log in as the attendee, and populate the form or portal with their attendee's details.

These links are typically entered in Merge Docs when inviting attendees to click on a link to open a registration form or portal that will have their contact details pre-populated.

This Attendee Tool lets you see sites, apps and portals with the specific attendee's details pre-populated, by clicking

on the URL or copying it into your browser. This will open the site or portal, using the Auto Login Token associated with this client.

For example, you can check exactly what your attendee sees when they log in, and update records specific to the attendee as well. Another good example would be to use the link to open the Attendee App so you can see the app exactly as this attendee will see it.

Site Auto Login

INTERACTIVE SITES

- 2025 Education Summit Attendee Registration +
- Payment Page +
- 2025 Group Registration +
- Education Summit 2025 Registration 2 +
- Education Summit 2025 Registration +

MOBILE APPS

- Education Summit App 2025 +
- Organizer App +
- 2025 Education Summit Attendee App +
- 2025 Education Summit Organizer App 2 +

APP STORE
SURVEYS

You may also want to read about managing:

- Attendees' Dietary Requirements
- Attendees who are also Exhibitors
- Attendees who are also Sponsors
- Attendee records (creating or deleting)