Pinned Record Sharing

What is Pinning Records?

Whenever you are working on a record, it will appear in the Recent list on the left side of the screen. However, you can also "pin" a record to the Pinned section, also on the left side. In any attendee record, simply select the ⭐ icon next to the Attendee name, and it will be "pinned" to the Pinned list on the left side of the screen.

This allows you to work in a different contact record, and instantly return to your "pinned" record whenever you need.
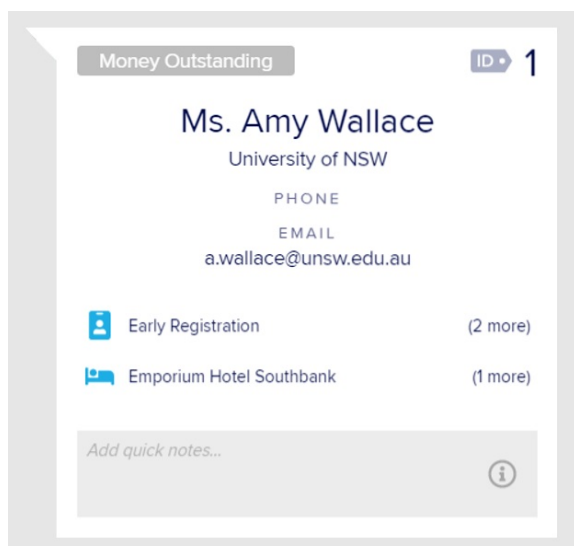
What is Pinned Record Sharing?

EventsAir allows you to view and interact with the Pinned Record list from any other user on your team. If other members of your team are also working in the Attendee Panel and creating their own Pinned List of Records, you can select and view any other user's list of pinned records, and interact with them as required.

Why Share Pinned Records?

In many cases, different team members may handle different tasks, and then other team members would continue working with the same list of attendees. For example, if Mike Smith was reviewing records for following up payments, he would "Pin" each attendee record that needed an additional review before sending out payment reminders. Then, his manager, Mary Jones, could access and review Mike's list of Pinned Records, review them, and decide whether they needed a follow up payment reminder. There are hundreds of potential scenarios like this for teams to share Pinned Records with each other.

Hover Cards

Whenever you hover your mouse over a Pinned Record, you will see a Hover Card appear. This card displays key details about the contact, and gives you the ability to enter a note which other users on your team can view.

Accessing Shared Pinned Records

You will automatically be able to see your pinned records at all times. To view your team's pinned records, simply click on the Hamburger Icon (the 3 lines) to the right of "My Pins" and you will be able to select which team mate's pinned records you wish to view.

Searching for Pinned Records

Throughout EventsAir, when using the search and filtering process, you are able to search for any other user's pinned records as well.