

# Registrations module (setup)

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For almost all conferences or events, you'll need people to register. Even if it's a free event, you still need a way to capture information about your attendees. Depending on what your needs are, you can also create different registration groups and types, with varying price points, discounts, inclusions etc.

**NOTE:** It's important to ask registrants for **relevant** information. This isn't just for your benefit, but also to follow data collection regulations. Plan ahead what information might be needed before creating your online registration forms, also called interactive (registration) sites.

After your event, you can also use registration categories and types to help you review your registration process. For example, you can run reports on:

- Registrations by group and/or type
- Registrations by date
- Registrations by region or country
- A combination of the above

## Registration module – Preferences

Before creating registration items, review your settings in **Setup Panel** -> **Registration** module.

Under **Preferences**, you'll see the following:

- **Net Target Revenue** – enter your registration revenue goal here. This amount is used to calculate target percentages on your event Dashboard.
- **Expected Attendees** – The number you enter here is used to calculate alerts (see below).
- **Optional Alert** – Set a percentage **Milestone Increment** (such as 25%) and when **each increment of 25%** is reached, an alert will be created.
- **Alert Level** – you can choose:
  - Information
  - Low
  - Medium
  - High
  - Critical
- **Meeting Matching** – Create your Meeting Matching settings, if required. ([Read more about using Meeting Matching in this article](#)):

- **Enable Meeting Matching** – switches on Meeting Matching.
- **Enable Attendee to Attendee Meetings** – allows attendees to meet with each other, usually at numbered tables; you can also set
  - Number of Tables Available
  - Table Name
- **Description for Organizer–Created Meeting** – a short phrase to describe any meetings created by the organizer.
- **Record Attendee Pre–Scheduled Meeting Preferences** – select to let attendees select preferences for exhibitor meetings.
- **Record Exhibitor Pre–Scheduled Meeting Preferences** – select to let exhibitors select preferences for attendee meetings.
- **Block meetings that conflict with Functions [or Sessions]** – you can select either or both of these, to block any requested attendee meetings if the attendee is registered for a function [or session] at a conflicting time.
- **Allow "estimated number" minutes after flight arrival for first meeting** – don't book a meeting until the attendee has had time to transfer from the airport.
- **Allow "estimated number" minutes before flight departure for last meeting** – don't book meetings for when the attendee needs to leave to catch their flight.
- **Enable Virtual Meetings** – lets attendees use Meeting Matching for virtual and hybrid events.
- **Enable Walk Time Restriction** – lets you set the Maximum Walk Time and the Time to Walk 10 Meters to assist when scheduling meetings
- **Automatically Update Requested Meeting Status** – define a timeframe for requested meetings to expire if the recipient hasn't responded to the meeting request. You also need to set a default status after that time period expires (either Canceled or Confirmed).
- **Notification Email** – set the brand and email details for meeting request notifications.
- **Meeting Request Response Site** – create the basic settings for a mini–website where people can respond to a meeting request, send a message, and either accept or decline the meeting.

## Registration module – Payment and Cancellation Policy

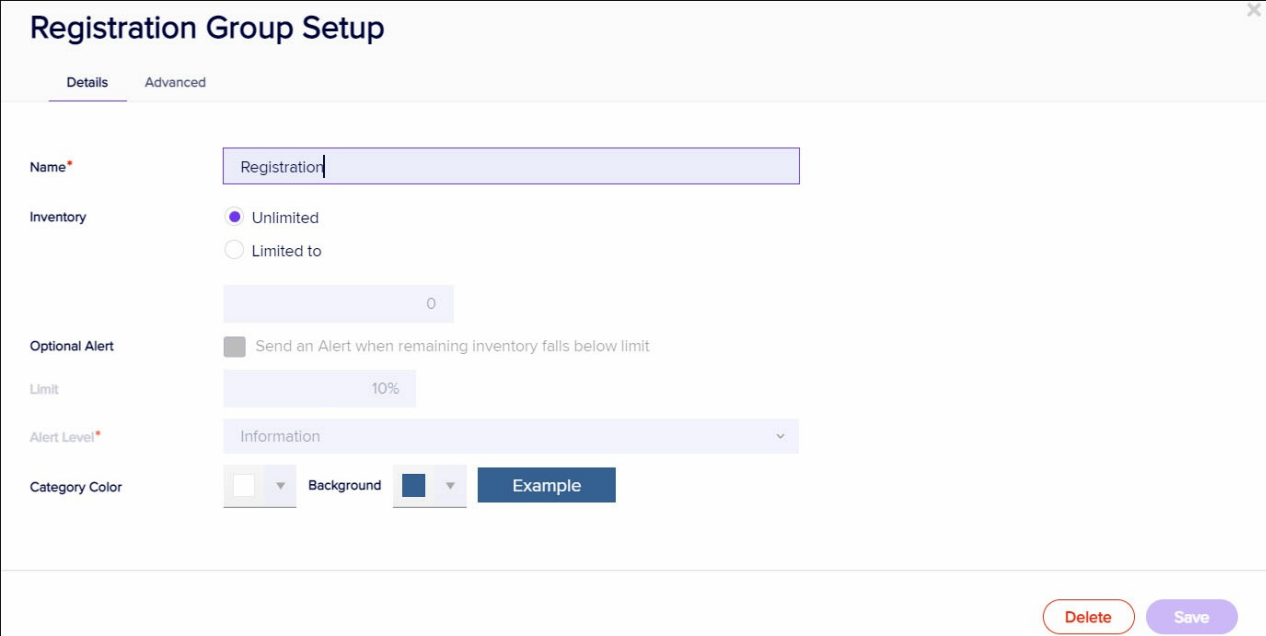
You don't have to create policies here, but it's a good idea. You can create default policies for entire Registration module.

Then, within each Registration type, you can either use the **Default Policy/Policies (including Schedules)** you created, or define a **Custom Policy (and Schedule)** for that Registration Type.

If you don't select anything on the overall (Registration module) Payment and Cancellation Policy tab, you won't see these options on individual Registration Types.

[Read more about setting up Payment and Cancellation Policies.](#)

## Registration module – Registration Group Setup



The screenshot shows the 'Registration Group Setup' form with the following fields and options:

- Name\***: Text input field containing 'Registration'.
- Inventory**: Radio button options for 'Unlimited' (selected) and 'Limited to'.
- Optional Alert**: Check box for 'Send an Alert when remaining inventory falls below limit'.
- Limit**: Text input field containing '0'.
- Alert Level\***: Dropdown menu set to 'Information'.
- Category Color**: Color selection area with a 'Background' dropdown and an 'Example' button.

At the bottom right, there are 'Delete' and 'Save' buttons.

Don't confuse **Registration Groups** – putting a number of Registration Types into a category – with **Group Registrations** (setting up online registrations and discounts for a group of attendees).

Registration Groups make it easy to collect certain registration types into a category or group (for example, so you can search or filter for communication or reporting purposes. You can also create specific inventory amounts, alerts and other settings for each Registration Group.

For example, you could create Registration Groups for:

- **One-Day Registrations** (with Registration Types such as Student Discount and Full Price)
- **Pre-Conference Registrations** (you might have different Registration Types for each industry)  
and/or
- **Regional Registrations** (with different Registration Types for each state)

Even if you don't **need** to put your registrations into categories, you still need at least one Registration Group, because each Registration Type has to belong to a Registration Group.

### Registration Group Inventory (and Inventory Alert)

The default Inventory for a Registration Group is "Unlimited". But you can limit the number of registrations for the

whole Registration Group by ticking the "Limited to" box under Inventory, for that Registration Group.

Once you do this and set an amount, the option to create an inventory alert becomes available.

You can set up an Alert to appear when the remaining inventory for that Registration Group falls below a certain percentage, specifying what percentage and what level of alert.

## Category Color

This lets you set a color for how this Registration Group's virtual name badges appear (in the OnAIR portal). The color bar appears along the bottom of each listing, showing the name of the Registration Group (similar to what you might set up for a live event).

## Meeting Schedules

You'll only see this if you've enabled Meeting Matching in Registration Preferences.

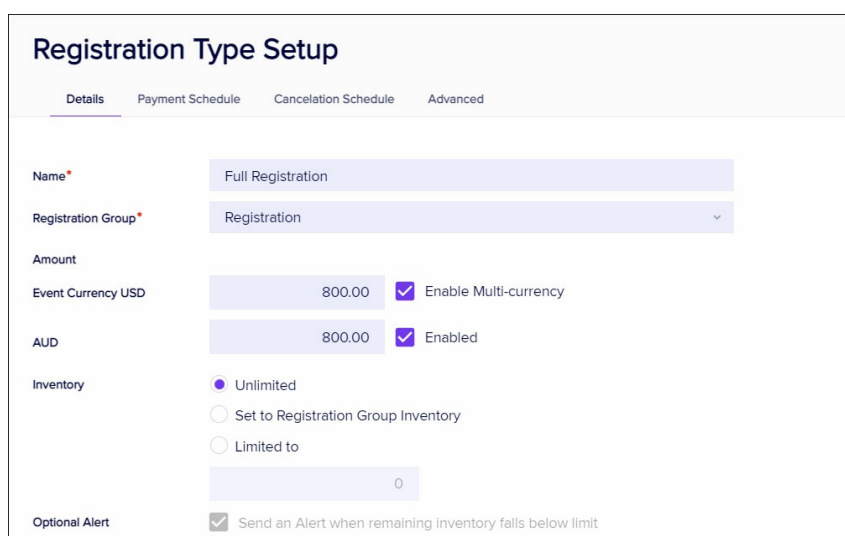
Meeting Schedules are the daily templates for meeting times, used by the Meeting Matching feature. When the Meeting Matching Express Action is run, this list of empty timeslots is used to create appointments.

You may need to create more than one meeting schedule.

Which Meeting Schedule to use for a person is specified in their [Registration Type](#) setup, or [Stand Type](#) setup (for Exhibitors).

[Read more about Meeting Matching, including what you need to setup in the Registration module.](#)

## Registration Types



The screenshot shows the 'Registration Type Setup' form with the following fields and values:

Registration Type Setup	
Details   Payment Schedule   Cancellation Schedule   Advanced	
Name *	Full Registration
Registration Group *	Registration
Amount	
Event Currency USD	800.00 <input checked="" type="checkbox"/> Enable Multi-currency
AUD	800.00 <input checked="" type="checkbox"/> Enabled
Inventory	<input checked="" type="radio"/> Unlimited <input type="radio"/> Set to Registration Group Inventory <input type="radio"/> Limited to
	<input type="text" value="0"/>
Optional Alert	<input checked="" type="checkbox"/> Send an Alert when remaining inventory falls below limit

Different registration types help you personalize the event experience for your attendees (and exhibitors and sponsors). They also help you effectively manage your event.

You can define many different settings for each registration type. Within the registration module setup for each type,

you can set the cost, limit inventory, set alerts, add a package, add to a catering count, and create meeting matching settings.

You can also specify payment statuses, invoice groups, tax amounts, and cancellation fees per type. These are all key steps to using other features.

Once you've set up different registration types, you can also create different paths and options for them on your interactive (registration) sites, and use them to categorize attendees for reporting and communication purposes, and even set up different name badges and check-in processes.

You can create as many different Registration Types as you need, for example:

- Early, regular and late registration
- Staff registration
- Exhibitor and speaker registration
- VIP registration
- Single day and multi-day registration
- Pre-conference workshop registration
- Exhibit-hall only registration

## Registration type – Details tab

When you create a Registration Type, your options will include:

- **Name** (mandatory)
- **Registration Group** – choose a Registration Group for this Registration Type (mandatory)
- **Amount** – how much this registration type will cost (leave blank if there is no charge).
- **Event Currency** – if you've enabled multi-currency in your event, you can choose currencies for this Registration Type. You can also override and amend the currency amount.
- **Inventory** – you can leave as unlimited, or set an inventory limit.
- **Optional Alerts** – see the "Alerts" section below.
- **Accompanying Person** – Select this option to create a spouse/guest or support carer registration type. When you add this to an interactive (registration) site, an attendee can select this along with their main registration and include details for a name badge. The Accompanying Person registration will appear on the main attendee's contact record.

Don't add an Accompanying Person registration type on an interactive (registration) site with the Group Component – it will try to create a group.

- **Include Package** – selecting this option provides a drop-down list of available [packages](#). When you add a package to a specific Registration Type, all package inclusions are added for anyone with that registration type. (This will happen whether someone chooses the Registration Type when registering online, or if you

manually assign it to them.)

- **Virtual Attendee** – if you check this box for a registration type, anyone with the registration type has access to any live-streamed content. (You also need to enable live streaming, and allow Virtual Attendees access to the Sessions/Functions as you're setting them up.) [Read more information about Virtual Attendees and Live Streaming.](#)
- **Include in Catering Count** – this option works with the Dietary Requirements portal and reports. You can choose whether or not to include a specific registration type for daily catering counts. For example, you may have "Morning Only" registration type, or a volunteer registration type for whom meals won't be supplied, and you'd say "No" for this option. If you say "Yes", you can select whether it's just for one day, or for a range of dates.
- **Meeting Matching** – if you've enabled Meeting Matching, you'll have the option to "Enable Meeting Diary" for this specific Registration Type. You can also further define the meeting matching options. To learn more, read the information about [Meeting Matching](#) setup.

## Alerts

If you set an inventory for a Registration Type, you may want to be alerted when the inventory drops below a certain percentage. You can set the following:

- **Optional Alert** – Check the box to send an alert once the inventory level drops below the pre-set limit.
  - **Limit** – sets the percentage of remaining inventory items to trigger an alert.
  - **Alert Level** – sets the alert level that you wish to send. A critical or high alert will also trigger alert indicators on the navigation bar and the event selection screen.

You can also create a Check-in alert for a Registration Type.

- **Check-in Alert** – will send an alert if anyone with this Registration Type checks into your event. (You then set the Alert Level, and, if you want to, specify the wording for the alert message.)

## Registration type – Payment/Cancelation schedules

For each Registration Type, you have the option to leave these tabs blank, add the default options for Registration module (once you've set these up) OR use custom options just for this Registration Type. [Read this article for more information.](#)

## Registration Type – Advanced Tab

Advanced options include the following:

- **Unique Code** – useful when internal codes are applied to a Registration Type.
- **Valid Payment Status** – the default [payment statuses](#) are Purchase, Inclusive, Complimentary, and Canceled.

You can also enable additional payment statuses, such as:

- No Charge
- Own Expense

- Invited
  - Not Attending
  - Not Required
  - Deposit
  - Charge to Another Contact
  - Split Charge
  - Waitlist Purchase
  - Waitlist No Payment Required
- **Invoice Group** – lets you assign a group code to identify this registration type for invoice purposes.
  - **Credit Hours/Points** – you can automatically give anyone with this Registration Type a certain number of Credit Hours/Points.
  - **Income Account** – you can assign any revenue from this registration type to a specific income account, for budgeting and accounting purposes.
  - **Taxes** – you can assign one or more taxes to this registration type. (You need to set them up first, under you event's [Financial Settings](#).)
  - **Cancellation Fee and Tax** – you can set a default cancelation fee amount for this registration type, adding any relevant tax(es). Again, you need to have previously set up the taxes in Financial Settings.

## Registration Discount codes

You can create discount codes for groups of attendees, particular registration types, or all registration types, and limit them to particular dates (or group sizes). [For more information on setting up discount codes, please read this article.](#)

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