

January Webinar 2024 – Mastering Merge Docs

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NOTE: EventsAir Version 16 is here and if you've already updated, your screen won't look exactly like this video. In the newer version:

- The event selection screen (opening screen) is cleaner, and Global Tools are under the Menu button.
- The Navigation menu (in an event) is on the left-hand side .
- Some tools have now been grouped (e.g. Attendee Action Buttons in the Attendees Panel are now all under the "Actions" button, top right).

After a changeover period, all our videos will be updated.



This icon in the toolbar of the video shows the chapters, so you can jump straight to the section you're interested in.

These questions have been collated from the 3 regional webinars. Some questions were asked by more than one person, so you may not see the exact same wording you used in your question. Also we can only answer in general terms, so bear in mind your specific situation may need a different solution.

Q&A

Useful links mentioned in this webinar:

Read the complete guide to using the features in the Communications Panel.

Twinking words or phrases, or creating new language versions of emails, sites, portals/apps: [Localization](#)

Log into the Support Portal to see these (if you're not logged in, these will take you to the sign-in page):

Preventing emails going to recipients' junk/spam folder: [Why are emails going to recipients' junk mail folders?](#)

Setting up auto confirmation emails: [How do I add a confirmation email \(for new or updated registrations\) on a registration site, or other interactive site?](#)

Auto-login tokens

Show All

Can you change the default for Auto Login Tokens to “never expires” instead of 7 days?

Sorry, for security reasons the default is 7 days.

To hyperlink an image with an auto login token, why don't you just highlight the "RSVP NOW" and insert link?

The tricky bit is that you're inserting a personalized token [that will update properly for each recipient], not a general link. The steps at the end of this article give more information: <https://eahelp.eventsair.com/home/all-about-auto-login-tokens> (And apologies for posting that link minus the final letter 's' in the original webinar chat!) If you have another method you prefer, that's fine too.

Calendar

Can we filter the Event Calendar element in a Confirmation Merge Doc?

No, sorry — but the method you're using (setting up a different Merge Doc for exhibitors) should be just as good, especially if you use cloning to save time and just change what you need to for that group of recipients.

Documents

What's a custom field document and how can I set one up? (May be useful for a Certificate of Attendance...?)

So to add a Certificate of Attendance, you might prefer to use the **Add Personalized Document** component. If you add this into your Merge Doc and expand the component, you can choose "Certificate of Attendance" (or any other available report) from the dropdown options — and this will include any copies of those reports you've created.

Alternatively, to provide the same document to everyone, you can use the "Attachments" component.

Another scenario might be where you've set up a Custom Field (document type). [When you open up the Custom Fields set up (in the Setup Panel of your event), you can create your own Custom Fields. The available field types include text, date, time, etc., and also Document.]

By adding this Custom Field into, say, your Registration Site, you could ask attendees to upload a document, then use the Merge Doc Custom Field to, say, send it back to them later to confirm that it's still correct.

In Confirmation Merge docs, you can add a receipt. How do I attach a 'receipt' when their registration is complimentary?

If there's not a payable item, the receipt won't show anything so you might be better off to create a **pro-forma invoice**. This will collate and combine not just payable items but others as well. Say that you have three items on one invoice and three items on another and you want one invoice with all of those, you'd use a pro-forma invoice.

[Just a word on where to find Pro-Forma Invoices – go into the Attendee's contact record, then use the Print Personalized Documents Action Button (on the right). Choose Pro-Forma Invoice (near the bottom of the list). You can select modules, and choose whether or not you only want outstanding payment items, or not show payments that have been made (although most people would expect to see what's been paid already).]

So the way to do this for a Confirmation Email is to add the Attached Personalized Doc component, then expand it and select Pro-Forma Invoice and choose what you want to show on that Pro-Forma Invoice for each person the message is being sent to.

Filtering

What does 'save as data snapshot' mean?

When you're looking at a group of selected records, you may want to know exactly who met those filter criteria at that moment in time (so you can run a future filter operation using that information). This is when you use Save as Data Snapshot.

Save As Data Snapshot saves the results, not the selection criteria. This means that any Attendees added after you made this selection are NOT included, even if they match your original selection criteria. If you want to save the Selection Criteria (instead of the results), just use the Save button inside the Filter screen.

Marketing vs Confirmation

When choosing Marketing or Confirmation types, is there an impact on how these are received (more likely to be marked as spam?)

No, not really — when you send a marketing email (even if it's a Confirmation email, but you're somehow using that as a marketing email), you legally need to include an opt-out. Generally if you're talking to someone who's already registered, it's not considered marketing because it's part of an existing business relationship. But if you're promoting or advertising something new, it's considered marketing rather than transactional.

When you tick the “this is marketing” checkbox, EventsAir will include an opt-out/unsubscribe element in the email, and won't send to anyone who's unsubscribed.

Being flagged as spam can also happen if you send too many emails or if your authentication hasn't been set up properly. You may also find the information below useful if your account is set up so that emails are sent from EventsAir via SendGrid, but appear to have come directly from your email address. This might be something to talk about with your IT department, or check the FAQs on our support portal (See links at the top of this article).

If you haven't already done so, your IT department, or the service where you purchased your domain, must create/amend the SPF record for our DNS. This is extremely important because if it's not done, the emails will be considered spam. [Read more about email gateways here.](#) Your IT department ALSO needs to confirm that your emails are being sent from an authentic email domain for a legitimate business purpose, by authenticating the domain in SendGrid.

See instructions here: <https://docs.sendgrid.com/ui/account-and-settings/how-to-set-up-domain-authentication>

Your Customer Success Specialist can help you give your IT dept access to SendGrid and we also have the SPF record information you need. Normally these steps are done as part of your account creation but if your emails are being rejected as spam it may be something to check. It also depends on the recipient — you may have to work with the recipient's IT department if they're a government / highly secure environment to whitelist your emails.

If an attendee has unsubscribed, will they still get things like Confirmation emails (that don't have 'This is marketing' ticked?)

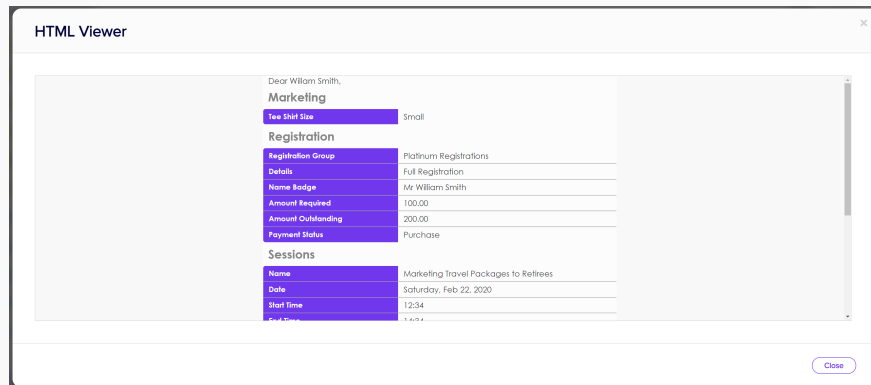
As above, even if someone's unsubscribed, they still get confirmation emails / transactional emails that relate to their business relationship. (This includes things like confirmations, invoices, vital information such as a change of venue.) But they won't be sent anything marked as marketing.

Styling and appearance

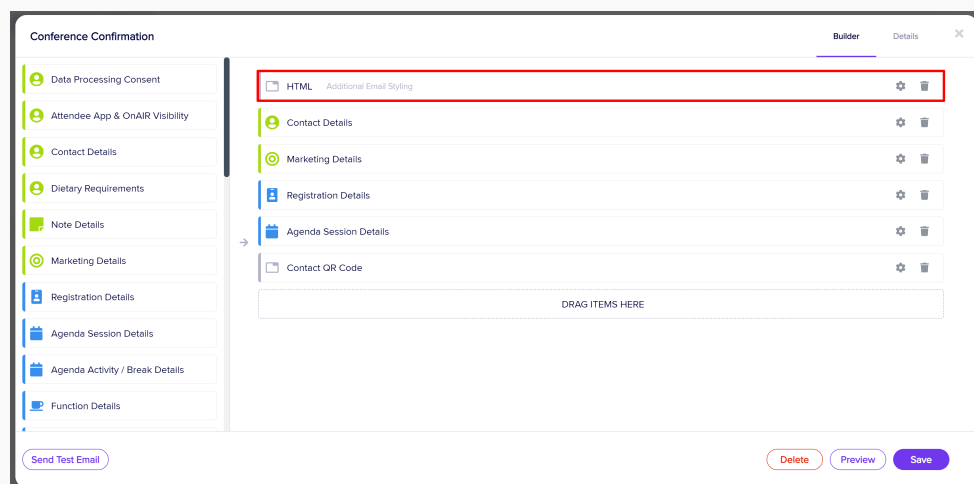
Can we customize how the Registration, Agenda etc. details appear in Confirmation merge docs?

Yes, possibly, but you need to be careful. Your brand (font and colors) will affect on how your Confirmation Merge Doc looks. Beyond that, while it's possible to change aspects of email by adding CSS, not all email clients support the same CSS modifiers and may remove it. It's also important to test thoroughly (more than one email viewer) before sending it out.

- With that said, if you want to adjust the formatting and feel confident editing the HTML:
 - Preview your Merge Doc (this will open the HTML viewer). Right-click and use "Inspect" to see the HTML code and work out what you'd like to change.



- To add in additional CSS, insert an HTML component at the very top of your Merge Doc email.



- Expand the HTML component, open the source code viewer `</>` and add your additional CSS. Be careful if you're adding generic selectors, as it may not add formatting to the sections that you want. There may also be other styling that overrides what you've added so you may need to include the "important" modifier to override all other styling.

Why do I see "Merge Document" in email preview text?

We had a question about this but we were unable to replicate the issue with multiple tests, including from the client's event. We think it may be because of a particular organization's email settings, which show hidden header code for received emails. Let us know if you have any other questions related to this.

Tag codes

Do Tag Codes get copied over also when you clone a Merge Doc?

From within the same event, yes. From another event, no.

Timing of email sends (Delayed vs Planned)

Are times for Planned Communication and Delayed Delivery based on the event time zone or the time zone of the person sending the email?

We've tested this and can confirm that both Delayed Delivery and Planned Communications are based on your local (computer's) time zone.

With Planned Communication, our team have had issues in the past with it not sending. Do all emails and alerts have to be sent at an hourly time? Or is this a glitch?

You do (at least currently) need to specify a send time that's 'on the hour' not at x number of minutes past the hour.

This is a feature request that's on our list 😊

What are the main differences between using Send Communications with Delayed Delivery and using Planned Communications?

For Planned Communications — your send process is triggered at the top of the hour. (So let's say it set for 11am. Each email may not go at exactly 11am but it'll start trying to send all your messages from that time. It does take some time to build the email, and depending on how many messages you have, so allow an hour or so for the messages to send.) But you can't set the send to begin at, say, 11.30 — it has to be on the hour. Whereas with Delayed Delivery (in Send Communications), when you specify 'don't send before this time' it will start trying to send as soon as possible after that time. So that could be at 11.22 if you want to get that specific.

Also, you can set up Recurrence in Planned Communications — "continue to send this out, based on this filter". So this could perhaps be a follow-up email that is sent to people 7 days after registration and you could keep that active during the registration period — it'll automate sending that email a week after registration to each person who registers.

One more important thing to note: A "Delayed Delivery" will send only to people **who met the filter criteria when you set it up**. However, a Planned Communication will filter at the moment of sending so it could bring newer records in, for example.

Suggestions / Requests / Issues

- **Add to Wallet feature has some glitches (colors, using Event Start Date & Time instead of individual items)**

We've reached out to get more information on these issues and can confirm that the colors problem is with our development team. We're still investigating whether a workaround is available for the event start date vs session/function start date aspect. There were some other problems with this feature but they've now been fixed. Please contact support if you're having any other problems with this feature.

- **Product development, improvements, Product Roadmap and questions for our tech team**

The EventsAir team are spending a LOT of time working to make our platform faster and more reliable, fixing issues, improving the look and feel. Over the last 12 months in particular, we've invested a lot, hired new people in key roles, and made a lot more information available to customers about what's changing and improving. We invite you to come along to AirWaves every alternate month, where you can hear directly from our CEO, Chief Technical Officer, and Head of Product.

If you haven't been receiving invitations to webinars each month, (we alternate between AirWaves & Education webinars), please email us: education@eventsair.com.