

Group Management – Quickstart Guide

Last Modified on 12/12/2024 10:36 pm EST



Want to jump to a particular section? Use the contents tab to the right of this article

EventsAir provides a powerful set of tools and apps to support group registration and management. [You can read a more detailed guide here.](#)

There are two key concepts:

- **Assign a Group Contact** – this can be done in the Linking Action found in the contact record. Once somebody has been assigned as a group contact, you can continue with other group processes.
- **Group Inventory** – Group contacts can purchase or obtain multiple items such as registrations, functions, travel and accommodations that are held as "group inventory." These Group Inventory items can then be assigned or allocated at a later time as group members are added or registered for a specific event.

Managing Groups

The group management tools in EventsAir let you:

- Assign a “Group Contact” (nominated leader/point of contact)
- Sell accommodation, registration or function inventory to a Group Contact for later distribution to group members
- Register all group members in a single online process
- Give Group Contacts a way to manage registrations and accommodation through dedicated group management portals
- Use Express Actions (Bulk Creation, Bulk Change) to add or change details for all group members, or selected group members

Attendee Panel Linking

Use this to assign a specific contact as the Group Contact or assign other contacts to be part of a defined group.

Group Inventory

A Group Contact can purchase blocks of rooms, registrations, or functions, for later distribution to group members on an ad-hoc basis.

Group Reporting

Detailed reports are available for all aspects of groups. Using the standard report filter, you can search specifically for groups by name, contact, or group members for detailed reporting.

Online Group Registration (via interactive site)

You can create dedicated group registration sites, so a group's coordinator (attending or not attending) can register all their group members online in one process, and either pay for the whole group or assign payment to individual attendees.

- This works well when every member of the group is ready to register and payment is being set up at the time of registration.
- This method also makes it easy to offer group discounts based on how many people are in the group, and to limit how many group registrations you'll allow.

Group Registration App

This specialized app lets group coordinators manage groups more flexibly, including importing individual members of a group, removing and adding members, sending out links for individuals to register, and processing payments either as a group, or assigning payments to individual attendees.

- This works well if new members may join the group later, and/or if they'll pay individually.
- This method also makes it easy for group members to make their own changes later, and allows for more tailored communications to individual group members.

Group Accommodation Portal

This specialized portal focuses strictly on housing management for groups. With this tool, group coordinators can view and manage their existing groups, add or delete group members, and make accommodation assignments as needed. Coordinators can easily stay on top of their accommodation block (in one or more properties).

Bulk Change Express Action

This lets you link multiple people to the same group in one simple step.

To assign a group coordinator or group member:

1. Select the Linking Action button on the right side of the screen.
2. You can choose to make the current contact record a group coordinator or a group member.
3. For a group coordinator, you will also enter the name of the group.
4. For group members, can select which group the current contact person is a member of.

Accommodation Group Inventory

Once you have defined a Group Contact, you can sell that contact group inventory for accommodations.

1. While in the contact record, choose the **Accommodation** option.
2. Choose the **Hotel and Room Type** as required.
3. Check the **This is Group Inventory** check box.
4. Once selected, you will be able to choose which **Accommodation** sub block you wish to use and enter the number of rooms you are wishing to reserve on behalf of this group contact.
5. Enter the **Payment Status**.
6. When you add new group members to this group, they will be able to be assigned rooms from this pre-purchased room block simply by selecting the **Payment Status of Group Inventory**.

Registration, Function and Travel Group Inventory

A Group Contact can also be allocated group inventory for registrations, functions or travel.

1. While in the contact record, choose a new **registration, function** or **travel** option.
 2. Choose the **desired item** as required.
 3. In **Payment Status**, choose **Group Inventory**.
 4. EventsAir will automatically assign the registration, function or travel item to the current group member and display the remaining inventory.
-