Express Actions Panel

Express Actions gives you handy tools to import and export data, make bulk changes and perform key actions quickly. For example, you can allocate dinner seating for a group who've just registered, change the venue for an outdoor lunch if it's raining, or update records for a large number of attendees, based on filtering criteria. You can also perform key actions such as printing name badges or re-issuing invoices.

There are two types of Express Action:

- Data Management
- EventsAir Processes

You can also Favorite an action by clicking the star to the left of the name to highlight it and bring it to the top of the list.

Brief descriptions and links to more information about each action are below:

Data Management Express Actions

- Bulk Cancellation – Filter and select multiple contact records, then cancel all or part of each attendee's registration in a single operation.
- Bulk Change – Filter and select multiple contact records, then change data within various modules for all attendees selected.
- Bulk Creation – Filter and select multiple contact records, then add new contact or registration details in a single operation.
- Bulk Delete – Filter and select multiple contact records, then delete each attendee's entire record in a single operation.
- Bulk Add Engage Points – Choose one or more attendees and give them extra Engage points.
- Comprehensive Export – Create a detailed export of EventsAir data across all modules.
- Duplicate Finder – Search for duplicate records based on different criteria, such as name, email address, phone or organization.
- Import Data – Import data into EventsAir from different sources, including CSV and Excel formats.
- Open/Close Payment Batches – Close your payment batches, or re-open them again if you need to alter them.
- Standard Export – Choose a pre-configured set of EventsAir data and quickly export it to Excel or Comma-Delimited formats.
- Update Contact Store – Update records in the Contact Store (a master repository of contact records connected to individual events). [Only available in events connected to a Contact Store.]
- Waitlist Management – Manage contacts records that have been added to the waitlist.

Processes

- Auto Event Check-In – Automatically check in attendees and print their badges using beacons and/or QR code

scans from the Attendee App.

- **Apply CE Credits** – Bulk assign Continuing Education credits to selected students who qualify to receive the credits.
- **CE Course Attendance** – Bulk update attendance details for your registered CE Course Attendees.
- **Exhibition Stand Allocation** – Assign exhibitors to stands by dragging–and–dropping in your exhibition floorplan.
- **Function Table Allocation** – Allocate table and seating assignments for meal or event functions within EventsAir.
- **Issue Invoices** – Generate attendee invoices for all records where the invoice (or credit note) is pending.
- **Meeting Matching** – Generate meeting diaries based on requests and preferences.
- **Name Badges** – Print selected name badges with merged attendee data, based on previously created templates.
- **PDF Merge Doc** – Create a PDF of multiple Merge Docs for attendees, based on your filtered selections.
- **Process GDS Data** – Review and select data before importing travel details from your travel booking system.
- **Re–issue Invoices** – Re–generate individual or multiple attendee invoices based on your filtered selections.
- **Room Release** – Set up room release schedules based on your specific contracted room release clauses for each hotel.