Communications Panel – Confirmation Merge Docs

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A Confirmation Merge Doc lets you personalize emails to attendees by including details from their record (such as which sessions or functions they've registered for). Creating Confirmation Merge Docs in EventsAir is a very straightforward process, and uses the drag-and-drop builder, so it's just like building an Interactive Site. Creating your Merge Doc ahead of time makes it easy to re-use it in multiple situations, such as:

- **Automatically** sending a confirmation whenever an attendee completes their registration.
- **Individually** sending a confirmation after you manually register an attendee.
- **Scheduling communications** to be sent out at a particular time, or on a recurring basis.

Confirmation Merge Docs are device responsive. Fonts and spacing are automatically adjusted for maximum readability, whether your attendees are viewing the email on their PC, smart phone, or tablet.

Inserting Auto Login Tokens

An Auto Login Token is a short line of code inserted at the end of a hyperlink. This turns the standard link into a personalized link, opening a website/app/portal with that person's contact details and other relevant information pre-populated. It can also be used to open a personalized version of a survey. Remember, Auto Login Tokens can be used in both Confirmation Merge Docs and Marketing Merge Docs. For more information, read this article about using Auto Login Tokens.

Create a Confirmation Merge Doc

Select the **Communications Panel,** and in the **Merge Docs** section, select **New.**

Enter a Title (name) for your email.

For Type, select **Confirmation.**

Choose a **Brand** to apply.

New Merge Doc

Title*	Confirmation Email
Type*	Confirmation ⌄
Brand*	Cyber Education International - 15th Annual Summit ⌄
Clone From	☐

Cancel   **Create**

You can also clone a Confirmation Merge Doc from one you've already created (either in your current event, or another one of your events).

Select **Create,** and the blank Merge Doc Builder will open.

Tip: Just like you'd use the builder to create an Interactive (Registration) site, use the drag-and-drop method to drag elements from the left-hand panel onto the right-hand side, to quickly design and customize your content, including with text and images. You can expand each element to edit what's in it.

Pressing **Save** will save your changes and close the Builder. Pressing **Save & Preview** will leave the Builder open

A typical Confirmation Merge Doc includes the below: :

- **Contact Details** — use this section to show the attendee name, address, email, and salutation.
- **Text** — use this element to create an introductory paragraph, such as welcoming an attendee.
- **Registration Details** — this section will add in the actual registration items that specific attendee has selected.
- **Function** – will show the actual function items the attendee has selected.
- **Accommodation** — details of the attendee's hotel booking.
- **Text** — you can use this section to close the communication, and perhaps give details on how to get more information.

A Merge Doc with these elements will look something like this in the builder:
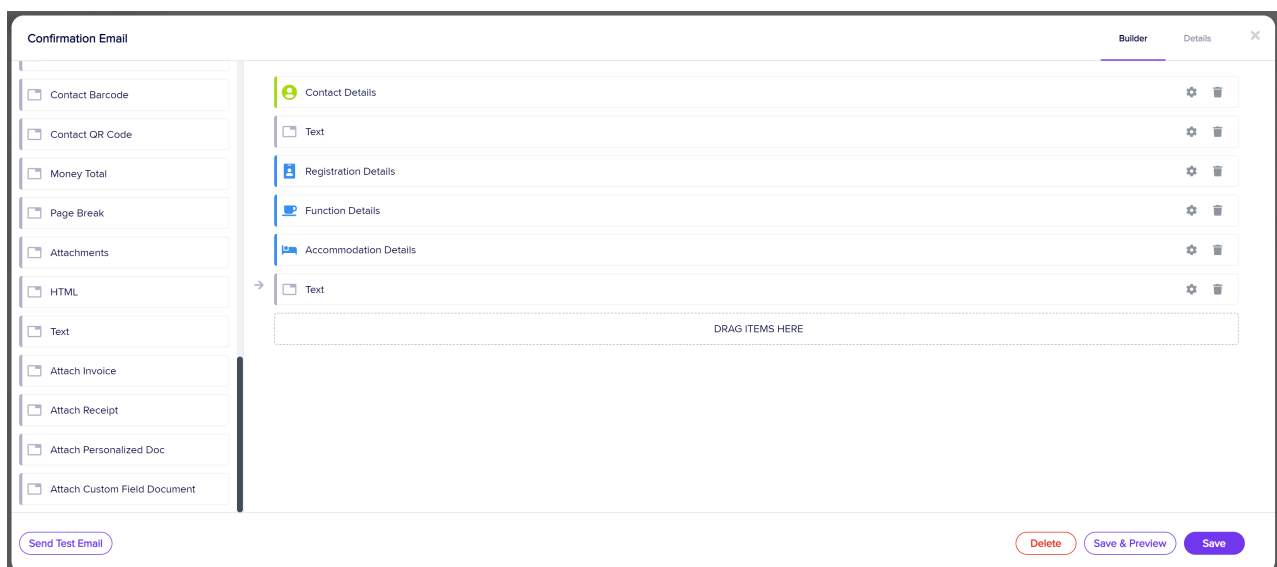

Components in the Confirmation Merge Doc Builder – complete list

- **Data Processing Consent** – inserts your Data Protection Policy Statements, then lets you collect a Consent (and/or Withdrawal of Consent) to use personal data for event registration
- **Attendee App & OnAIR Visibility** – inserts the Policy Statement followed by the choice to Opt-In or Opt-Out of displaying contact details in Attendee Search, Function Table Allocation and EventStream
- **Contact Details** – lets you define which contact fields (e.g. Name & Address details) will be displayed in the Merge Doc
- **Dietary Requirements** — displays any dietary requests submitted
- **Note Details** – inserts text from Notes filled out during registration
- **Marketing Details** – inserts text from Marketing details collected during registration
- **Registration Details** – inserts text from the attendee's Registration module

- **Agenda Session Details** – inserts agenda items from the attendee's record
- **Agenda Activity/Breaks Details** – inserts Activity and Break information from the attendee's record
- **Function Details** – inserts text from the attendee's Function module
- **Accommodation Details** – inserts text from the attendee's Accommodation bookings
- **Travel Details** – inserts text from the attendee's Travel bookings
- **Speaker Presentation Details** – inserts text from Speaker and Presentation details, where the attendee is the presenter/speaker
- **Session Role Details** – inserts Presentation details for attendees marked with any Session Role (e.g. Chairperson) in a Session
- **Reviewer Details** – inserts text from Presentation details for any paper this person is reviewing
- **Exhibition Details** – inserts text from Exhibition bookings for this person
- **Sponsorship Details** – inserts text about the person's Sponsorship packages
- **Payment Details** – inserts the details of payments provided
- **Event Calendar** – lets you create a **Save Event Date to Calendar** link, for data compatible with Outlook and Google calendars. You can define the label, subject, start and end dates and times, time zones and additional details
- **My Agenda Calendar** – lets your attendee save their specific My Agenda items to Outlook and Google calendars. You can opt to include ICS files to the email, select what agenda items to include and to select all or just future dated items.
- **Add to Wallet** – lets the attendee save their QR code to their phone's Apple or Google Wallet, offering a useful scannable ID instead of a name badge
- **Contact Barcode** – inserts a 1D barcode to identify the attendee
- **Contact QR Code** – inserts a QR code to identify the attendee
- **Money Total** – inserts a total of all money owed
- **Page Break** – inserts a page break within the body of the email
- **Attachments** – lets you attach a PDF or other document to your communication
- **HTML** – lets you insert a block of HTML-formatted text and graphics
- **Text** – lets you insert plain text into your communication
- **Attach Invoice** – attaches an invoice. You will have options to exclude pending invoices, and exclude invoices when the contact has already paid in full.
- **Attach Receipt** – attaches a receipt
- **Attach Personalized Doc** – allows you to attach reports found in the Contact Print section of an attendee's record (e.g. Certificates of Attendance, Itineraries etc.)
- **Attach Custom Field Document** – any Custom fields of the Document type, from within Contacts or any sub-modules, can be attached to this Merge Doc
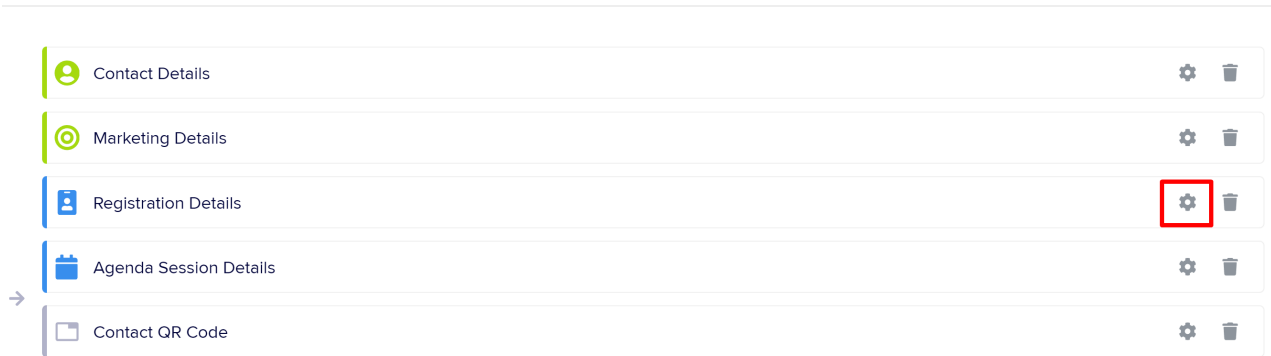
Edit a Confirmation Merge Doc

You can expand each component to edit it. For example, in the Text component, if you click on the **Setup Cog:**
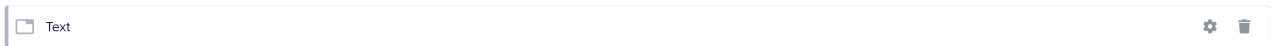
Text	⚙ 🗑

You can enter your preferred text in the Text tab, in the Details field. For example:

Thank you for registering for our 2024 Conference. Please check the following details to ensure everything is correct with your registration.

Another example of how you can edit is to click the Setup Cog for the **Registration** component.

	Contact Details	⚙ 🗑
	Marketing Details	⚙ 🗑
	Registration Details	⚙ 🗑
	Agenda Session Details	⚙ 🗑
	Contact QR Code	⚙ 🗑

Then, in the Fields Tab, let's say you wanted to cut down on the number of details – you could de-select everything except for the **Show Registration Name** and **Show Name Badge** options:
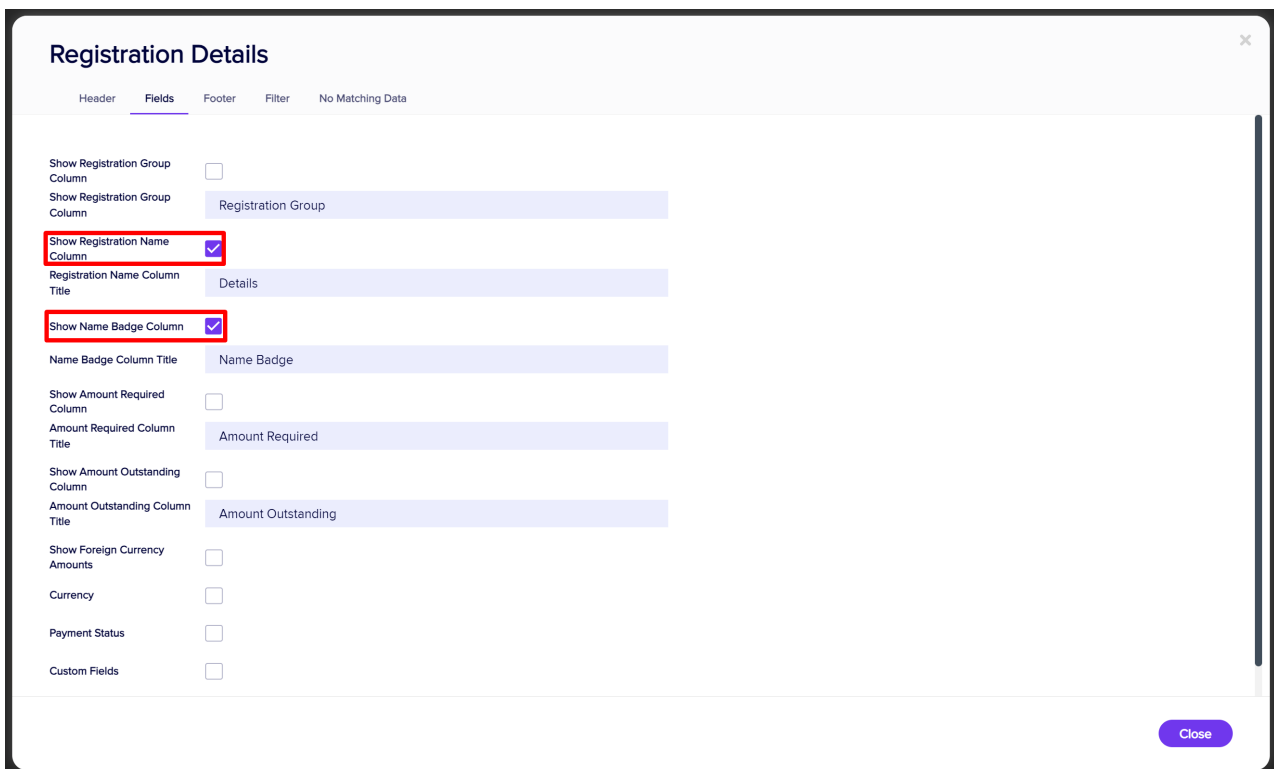
(This is similar for other components: for example, in **Functions** you may choose to only include, say, **t**he Function name, date and start time, in Accommodation, you can select what to show, etc.)

Using a Filter

There are two ways to use a filter for a Confirmation Merge Doc:

- **If you filter directly on a Module (Registration, Functions, Accommodation, Travel, etc.), ONLY the items you select for that module will be shown.**
- **If you filter on an HTML component that's under a Module, the information is ONLY shown when the filter conditions are met.**

Example of the first use:

E.g. If you have an event that includes a number of functions, but you **only** want the Awards Dinner to appear under Registrations in the Merge Doc you're creating. In the Confirmation Merge Doc builder, open up the Function component, and select the Filter tab, then specify Awards Dinner as the function to include. You'd also exclude anyone who's canceled.
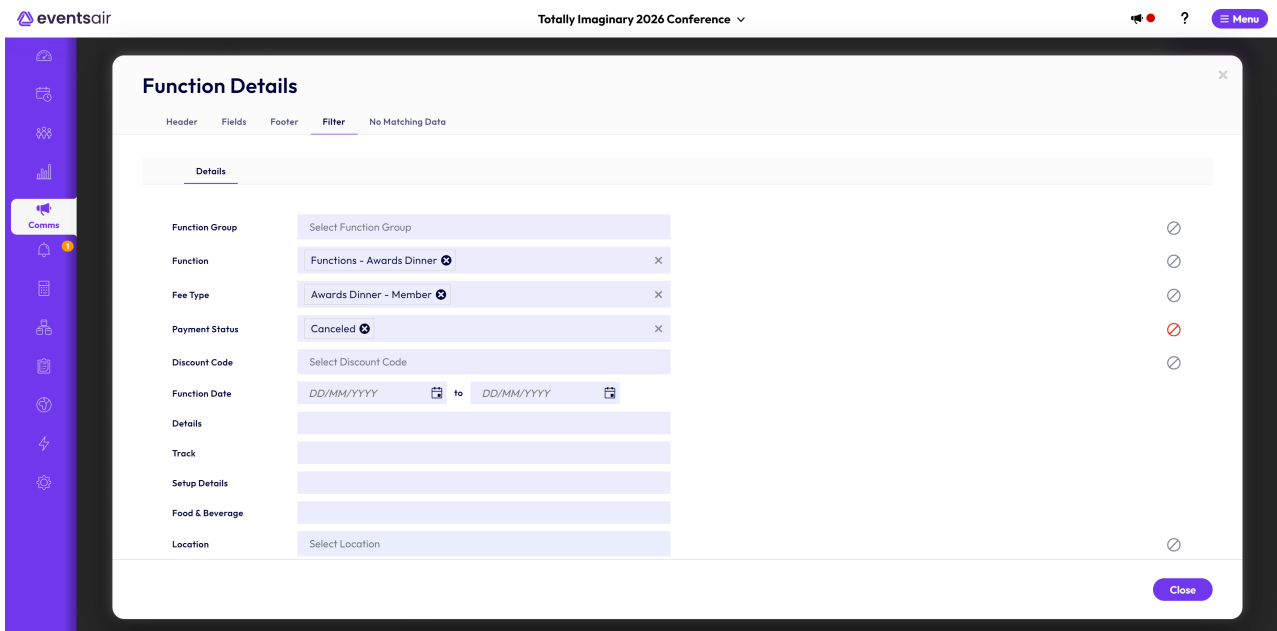
Example of the second use:

E.g. To add extra information about a cocktail party, but only show it to people who'll be attending the party, add an HTML section to the Functions component of the Merge Doc (by dragging it in under Functions).

Put the text into the Details tab of the HTML section. Then use the Filter tab for the HTML section to filter for a specific Target Group. (You'd include people who are going to that function, and exclude anyone who's canceled.) Select Apply, and this HTML section will now **only** appear in the Merge Doc if the filter conditions are met (the person is going to the cocktail party).

Header	Text	**Filter**	No Matching Data

Filter   ○ All Contacts

                ● TargetGroup

Read more about using Searching and Filtering features in EventsAir.

Finishing touches

Add any closing text if required. Use the second Text Component you added, click on the Setup Cog and enter your text, such as:

We look forward to seeing you in Las Vegas!

Sincerely,

Your Conference Registration Team

Select **Preview**. You can continue to fine-tune the formatting, content and structure until you're happy with your Merge Doc email.

Help prevent your emails being flagged as spam

Although EventsAir does allow you to send emails directly (usually via SendGrid), we don't control what happens at the recipients' end — that's in the control of their email provider.

Major email providers are tightening up their guidelines and definitions of 'spam'.

There are also other organizations that may choose to flag certain email domains as 'spam' and again, this is outside of EventsAir's control.

Because email marketing is a key part of promoting your event, we want to help you stay up to date with security and authentication requirements of major platforms such as Gmail and Yahoo. This helps reduce the risk of having your emails being incorrectly flagged as spam, or not delivered. It also helps ensure other people using the same domain to send emails are not incorrectly flagged as spammers.

You should also be mindful of the laws and regulations relating to bulk messaging and data privacy — not just in your own region but in your recipients' region(s).

All of this requires regular and proactive review and updating of your email sending practices. At a minimum, we recommend:

Meet Authentication Requirements:

Ensure your email sending domain is **authenticated using SPF protocols**. This helps email providers verify the legitimacy of your emails and reduces the likelihood of them being marked as spam. If we've contacted you to suggest making these changes, please do so quickly, and contact us if you're unsure about what to do.

Review email content and subject lines:

When you send engaging and relevant content that gives helpful information, rather anything that sounds like a 'hard sales pitch', your emails are less likely to be flagged by a recipient as spam. You should ensure you're familiar with rules on 'account related' emails (i.e. sending essential information about an existing business account or transaction, such as confirming registration details) versus marketing emails (where you're selling or promoting a service to customers or potential customers).

Certain phrases and words may automatically trigger a spam filter. Avoid excessive punctuation (exclamation marks, all capitals) or words such as "FREE" in either the content or subject lines. For example: "FREE TICKETS!!!!!!" may be true, but also may be flagged as spam. If you need more information, we encourage you to research further and use the resources we've included below.

Include Unsubscribe links:

For any marketing and promotional emails, bulk senders MUST give the option of unsubscribing with just one click directly within their email campaigns. An unsubscribe link is automatically added to your email footer when you create a **Marketing** Merge Doc. Be cautious using Confirmation Merge Docs for marketing, and always check the "This is Marketing" box as this will create an unsubscribe link if there isn't already one there.

Keep your mailing lists updated:

High bounce rates and low engagement can negatively impact your sender reputation and affect deliverability. Ideally, you should only email people who've opted in to receive your emails. Regularly clean up your email lists to remove inactive or invalid email addresses. NEVER purchase email lists or scrape email addresses from other sites. If your audience hasn't heard from you recently, and aren't expecting to hear from you, there's a greater chance they'll mark your email as spam.

Don't send marketing emails to people who've opted out:

When sending a marketing email, checking the 'This is Marketing' box ensures that the email won't be sent to people who've unsubscribed from marketing emails **from this event***.

Email unsubscribe lists in EventsAir are event-based, so if you want an individual to be able to unsubscribe across ALL events, you should either use a contact store OR manually unsubscribe them from each event where they may be listed.

HELPFUL RESOURCES:

→ 8+ Best Practices to Improve Your Email Deliverability:

https://sendgrid.com/en-us/blog/8-best-practices-to-improve-your-email-deliverability

→ 9 Reasons Why Your Emails Go to Spam:

https://kinsta.com/blog/why-are-my-emails-going-to-spam/

→ A Complete Guide to 2024 Email Deliverability Updates:

https://www.braze.com/resources/articles/guide-to-2024-email-deliverability-updates-what-to-expect-from-gmail-and-yahoo-mail

Need more help, or have taken all these steps and still having problems? Please lodge a support ticket.