

Interactive (registration) sites

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Your interactive (registration) site lets you capture rich data during registration – not just contact information, but marketing info, accommodation details and more. Attendees, exhibitors, sponsors, and presenters can easily register and pay online, with real-time inventory checks and waitlists to avoid overbookings and missed opportunities.

You can add [Form Logic](#), to only show certain sections to people who meet your chosen parameters. (For example, if an attendee registers for the first day only, your site will skip questions regarding activities on subsequent days).

You can host your registration site on one of our predefined URLs, or use your own URL.

Plan ahead

Before you build your interactive (registration) site, make sure that:

- The brand(s) you plan to use have been created in the [EventsAir Brand Editor](#).
- All your modules (e.g. registration, accommodation, presentations, travel) have been set up and populated with information.

You can make changes to various items (registration, travel etc.) later, and the updated information will flow through to your site. BUT in many cases (for example, Function names or Travel Sectors), **the heading will not update on the site**. This is because your registration site has the heading as a separate field, to let you edit it. Always check any changes from an attendee viewpoint to ensure they're appearing how you want them to.

- You've planned out your merge docs and other [communications](#) (for example, your confirmation email).
- Your Payment Types are correctly defined in [System Setup–Financial](#) (so you can accept online payments). This will probably include having set up a credit card gateway/payment gateway.
- You're familiar with the basic functions of the [Drag-and-Drop builder tool](#).
- You understand [how to use logic operations](#) on your interactive (registration) site.

Create an interactive (registration) site

- Go to the Online Panel
- Select the **New** button under Interactive Sites.
- Fill in the Title, Alias (short name for the URL) and select a brand.
- If you want to, you can clone from another site.
- Choose Create to save your settings and create your new site.

NEW INTERACTIVE SITE

Cancel Create

Title* Cyber Education French Registration

Alias* Cyber Ed French Reg ✓

Brand* Cyber Education International - 15th Annual Summit Brand ▾

Clone From Cyber Education Registration Site ▾

Add elements using the Builder

You can drag components to the "Drag Items Here" section, and move them around as needed, delete items, and even clone or delete pages.

For more detailed information, [read this article](#).

There are also some ways of using the builder that are specific to interactive (registration) sites, described throughout this article.

While using the builder, pressing **Close (if visible)** will close the current component you're working on, but keep the builder open.

Pressing **X** (top right) will close the builder but will ask you if you want to save first (you can say 'Don't Save' if you've made a change you don't want to keep).

Pressing **Save** will save your changes and close the Builder.

Pressing **Save & Preview** will save and leave the Builder open, and open what you're working on in a browser so you can how it looks.

Input types (various components)

In many cases, you'll want to give people a choice of various registration categories, meals, activities or sessions.

You may want to only let one item from a list to be selected, or allow multiple selections.

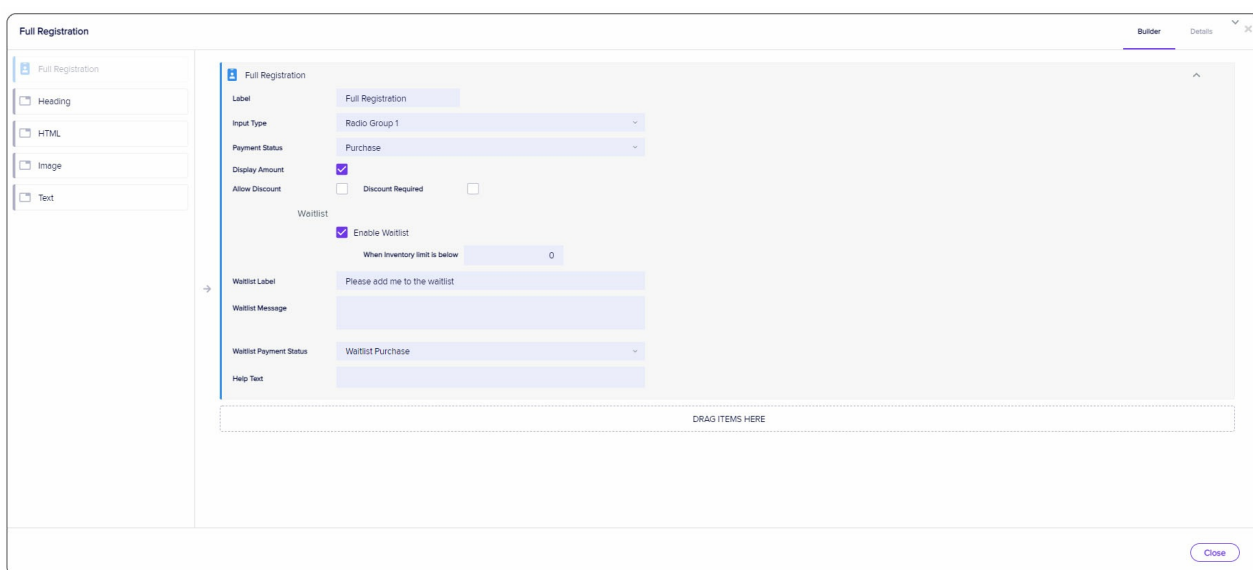
Depending on the type of item, you'll see some or all of these input types as options:

- **Checkbox** – Site users can make multiple selections within a group of functions or marketing items.
- **Radio Group** – These only allow ONE button to be selected from the group (used for functions, registrations, marketing tags and other items). You can have up to 9 Radio Groups on a site.
- **Dropdown List (Optional)** or **Dropdown List (Required)** – These are used for items such as dietary requirements or marketing tags. All available items for selection are shown in a dropdown list. You can either make choosing something from the Optional or Required (Mandatory).
- **Number** – Attendees can enter a number (to indicate how many, for registrations or tickets).

- **Page Radio Group** – Similar to a radio group, but used when you only want to allow ONE selection from all items displayed on the page. You can have up to 9 Page Radio Groups on a site. You'll only see this option where it's applicable.

Details tab within a component/item

When creating your Registration Site, each Builder Sub-Item may have its own unique settings. For example, if you're including three Registration Types in your online registration (Student, Member, and Non-Member), clicking on the Setup Cog on each sub-item will let you edit specifics for that Registration Type. You can access the Details Tab for each specific Sub-Item while you're editing it.



When you are in a specific Builder item, clicking on the Details Tab will let you:

- Define when data can be edited:
 - No Restrictions
 - Not Editable After Initial Data Entry
[If you choose this option, an attendee can put in information the first time they register on the site, but it will be 'read only' if they return later.]
 - Editable until a specific date
 - Read Only
- Set Visibility
 - Always
 - Visible Between a Specific Date Range
 - Not visible (for example, if you're not sure when you want to make it visible).

The Details Tab for items in Travel, Accommodation, or Function items also includes other specific settings for those items.

Logic tab within a component/item

Read more about logic operations in this article. Component logic applies logic rules to specific items on the site, rather than whole pages.

List of interactive (registration) site builder components

Data Processing Consent

This is where you can display your data privacy policies during registration, then register consent (or withdrawal of consent) for the collection of personal data.

The screenshot shows the configuration interface for the 'Data Processing Consent' component. It includes a title bar with a person icon and the text 'Data Processing Consent', along with expand and delete icons. The configuration area contains four fields: 'HEADING' with the value 'Data Processing Consent', 'TEXT FOR GIVE CONSENT OPTION' with the value 'I give consent', 'TEXT FOR WITHDRAW CONSENT OPTION' with the value 'I withdraw consent', and 'HELP TEXT' which is currently empty.

IMPORTANT:

- You can display JUST the Consent option or show both (Consent and the Withdrawal of Consent) options.
- If you leave the Withdrawal of Consent option blank, only the Consent option appears (as a checkbox).
- If you put text in both options, then both will appear (as radio buttons).
- If the attendee decides to Withdraw consent, the registration process is ended.

Attendee App and OnAIR Visibility

This option lets attendees Opt In or Opt Out of having their contact details visible in the Attendee App and OnAIR.

The screenshot shows the configuration interface for the 'Attendee App Visibility' component. It includes a title bar with a person icon and the text 'Attendee App Visibility', along with expand and delete icons. The configuration area contains four fields: 'HEADING' with the value 'Attendee App Visibility', 'TEXT FOR OPT IN (CONTACT DETAILS SHARED)' with the value 'I would like to Opt In - share', 'TEXT FOR OPT OUT (CONTACT DETAILS HIDDEN)' with the value 'I would like to Opt Out - do i', and 'HELP TEXT' which is currently empty.

In other words, they can give Consent to the collection of personal data, but Opt Out of having their contact details visible in Attendee Searches, function table allocation, and in the EventStream Private Social Network.

Attendees who opt for privacy here will still be able to use the Attendee App and OnAIR Portal, but their information won't be visible to other attendees, and therefore they cannot:

- Search for and message other attendees
- Actively participate in EventStream (although they can still see it)
- Be part of Function Table Allocation

Contact

You can decide which contact fields will be displayed, set whether they're required/mandatory, and edit the label text.

With one or two exceptions, every field in the Contact Component has these options:

- **Required** – check this box to make the component mandatory
- **Dropdown Values** – if visible as an option, you can enter a list of items that can be selected via a dropdown list (e.g. for title, you could enter Mr, Mrs, Ms, Miss, Dr. etc.) Be sure to enter only one value per line.
- **Help Text** – you can provide extra instructions, that will appear if someone clicks the small question mark next to the field name on the site.

Using Contact Fields on Multiple Pages

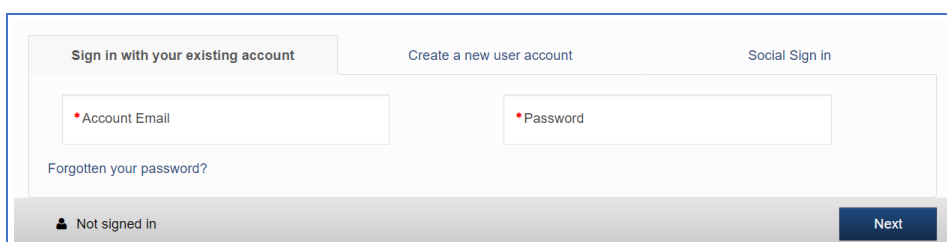
You can use contact fields on different pages on your interactive (registration) site, and can make some editable and others read-only. Be careful how you use this feature as repeating the same field in multiple locations can cause previously entered information to be overwritten or changed.

Special Contact Component Fields

- **Photo** – You can capture and edit photos during the registration process. See [Attendee Photo Management](#) for more details on cropping photos.
- **Dietary Requirements** – this lets you get information about your attendees' dietary requirements. The list is determined in the Contact Module in setup. Options include:
 - **Label** – you can edit the label of the field, and for each dietary requirement
 - **Allow Other** – lets your attendees enter a dietary requirement not shown in the dropdown list
 - **Input Type** – you can choose Dropdown List (Optional) or Dropdown List (Required)

Sign-in Page

If added to your site, this will always be displayed first when the interactive (registration) site is first opened, thereby requiring either creation of a new account, or a sign-in from someone who's previously registered. You can also allow attendees to register using their Facebook or Twitter accounts.



The screenshot shows a sign-in page with three tabs at the top: "Sign in with your existing account" (selected), "Create a new user account", and "Social Sign In". Below the tabs are two input fields: "Account Email" and "Password", both with red asterisks indicating they are required. A link "Forgotten your password?" is located below the email field. At the bottom left, there is a status indicator "Not signed in" with a person icon. At the bottom right, there is a dark blue "Next" button.

Notes

Use this to collect information for a note type during the registration process.

Marketing

Use this to collect additional marketing data (such as a marketing tag you've set up previously) during the registration process.

Registrations

To add Registration types, Marketing tags or similar:

- Select the down arrow next to Registrations, Marketing etc (listed in the left-hand pane) to see different blocks you can add.
- Drag and drop each registration type (or marketing tag etc) into the site.
- Expand each item and edit as needed, add logic, etc.

Agenda Sessions

This item will let you display all **non-concurrent** agenda sessions you want your attendees to be able to select during the registration process. You can edit, re-arrange or remove any presentations within the selected session.

Agenda Concurrent Sessions

This item will let you display all **concurrent** agenda sessions for your attendees to select during the registration process. Expand the component on the left using the arrow then drag across the ones you want included.

Agenda Activity/Break

This item will let you display **agenda activities or breaks** for your attendees to select.

When you drag and drop this component into the builder, all defined activities and breaks are listed on the left and you can drag in the ones you want to include.

Functions

To add Functions:

- Use the arrow to expand each **Function Group** listed in the **left-hand panel** to see all functions under that group.
- Drag in the functions you want.
- This will bring in ALL the associated fee types for that function.
- Use the Cog to expand the function information and individual fee types to add or edit settings.

You should also check the **Details** tab for **each Function item** to see and edit settings for recording guest names and dietary requirements (and the same editing options you'll see for all components).

Accommodation

To add hotel rooms:

- Drag and drop the Accommodation component into the site.
- Select the Setup Cog to see the list of your hotels appear in the left-hand panel (you need to have set these up earlier).
- From a listed hotel, use the arrow to see all available room types you can drag in.
- Drag and drop a room type into your site.
- Once you've added this, the hotel name appears in the right-hand panel with an arrow.
- Expanding the hotel name in the site lets you add more room types.
- Expand each hotel and room type to edit the details, add Logic operations etc.

You should also check the **Details** tab for the **Accommodation** component to see and edit accommodation-specific settings for that hotel:

- Hotel Information, such as photos, maps, star ratings, website links, and more
- Room Information, such as room photos, descriptions, max occupancy, the ability to set Payment Status by Room type, and more
- Search options, such as searching for rooms by check-in and check-out date ranges, and more
- Filter options, such as distance from venue, star ratings, and more
- You can also see the same options to limit editing as you would under the Details tab for all components.

For each room type, you can **drag in** extra components:

- Share With
- Special Requirements
- Estimated Time of Arrival and Departure
- Transfers
- Credit Card Guarantee

Within each room type component, you have these options you can configure:

- Ignore Minimum Night Stay Checkbox
- Allow Accommodation Discount Checkbox
- Enable Waitlist Checkbox

Travel

To add Travel items:

- Drag and drop the Travel component into the site.
- Select the Setup Cog to see the list of your travel sectors appear in the left-hand panel (you need to have set these up earlier, in the Travel module in the Setup Panel).
- Drag individual travel sectors into your interactive site.
- If you drag in Multi-Sector, you need to choose multiple sectors.
- You'll also see options to drag in Custom Inbound, Custom Outbound – if you drag these in, you need to expand these and choose a Travel Type for them.

You should also check the **Details** tab for the **Travel component** to see and edit settings for recording number of passengers, their names, and frequent flyer membership details. You can also review which details will be displayed for travel sectors.

You can also see the same options to limit editing as you would under the Details tab for all components.

Registering a group on an interactive site

If you want your groups to be able to register online, especially if you want to allow group discounts, there are special features on the interactive site available.

The Group Component, once dragged into your site, will immediately appear as the very first element in the site.

It allows you to create one or more group discounts, and enables the online group registration process.

[Read this article for more information about Group management and using interactive sites to register groups.](#)

Payment Page

If you're accepting payments, inserting this item will set up your payment collection page. You can opt in for credit cards, cash, check or purchase orders. Remember, you need to have already set up your E-commerce Gateway as EventsAir's E-commerce Gateway Connection.

Enable Additional Payment Option

You can also select up to five Additional Payment Options. When you select the check box for each Additional Payment Option, you'll see three options:

- **Process via a 3 Tier Gateway** – choose payment gateway that you've created in Application Setup. This is useful in cases where you want to present more than credit card gateway option.

- **Mark as Paid** – this option lets you select an additional payment type that's NOT your usual credit card payment. An electronic funds transfer would be a possible reason to select this option.
- **Add Note** – this is for special payment situations. Selecting this option lets you add a specific note type and message to the contact record. You can then search and filter on this note type for further payment follow up.

Future Payments

If you've enabled a payment schedule, you can add the option for future payments. This is where an attendee can pay only the payment due at the time, or elect to pay an additional amount (up to the full amount owed) on a separate line in the payment page.

Summary Page

A Summary page is highly recommended, to recap all registration choices, and make it easy for the attendee to go back to a specific section to update if needed. Elements of the Summary Page include:

- **Summary component options** – you can display financial totals and event cancelation options:
 - **Show Amounts** – shows the individual amounts due for every item with an associated cost.
 - **Show Total** – shows the total amount due for the current registration.
 - **Do Not Separate Tax Amount** – when selected, tax amounts are rolled into the total amount due and not displayed separately.
- **Heading Component** – you can enter here what you want a heading to say
- **Text, Image and HTML Component** – enter the general terms and condition text here
- **Terms and Conditions Component** – you can edit or include the following:
 - **Heading**
 - **Text**
 - **Include Event, Payment and Cancelation Terms and Conditions** – you can write event-wide and item-specific terms and conditions for event policies, payment policies, and cancelation policies. You can check the appropriate boxes to include these policies as part of the terms and conditions displayed during the online registration process.

- **Text for "Agree" checkbox** – you can change the text for the "Agree" checkbox here. Attendees must check this box to proceed with their registration.

- **Help Text**

Submit (button)

By default, a submit button is always added, but this section lets you define what text appears on the Submit button.

Thank You (page)

This is the message that the attendee will see at the end of the registration process. There are various options you can drag into the Thank You page:

- **Link Button** – lets you define a "Continue" button that will redirect the attendee to another URL
- **Registration Confirmation** – will display registration details along with additional text you create here
- **Receipt Number** – displays the receipt number for this registration
- **Authorization code** – displays the authorization code for this registration
- **Event Calendar** – lets you create a "Save Event Date to Calendar" link, with links compatible for Outlook and Google calendars. You can define the label, subject, start and end dates and times, time zones, and additional details.
- **Heading** – click on the down arrow to define the heading title, details, links, or help text.
- **HTML** – lets you add custom content, HTML formatted.
- **Image** – lets you add an image.
- **Text** – useful for introductory instructions. Click on the down arrow to add your text.

Page Break

Useful for breaking up your registration site into multiple pages.

Logic operations

[Read more about logic operations in this article.](#) Those listed below are applied by dragging and dropping them in from the left-hand panel into the correct place in the builder.

- **Page Display Logic** – Lets you define if a page will or will not be visible, based on prior selections made during the online registration process.
- **Page Validation Logic** – Lets you confirm that specific information or data has been supplied on a page before continuing on to the next page.
- **Redirect Logic** – Lets you redirect the user to a different website, URL, or app, based on data provided earlier on the same page.

Captcha

Inserts a Captcha screen in your registration so you can block any automated tools attempting to access your registration page.

Submit Actions tab

Submit actions will occur once the "Submit" button is pressed to complete a registration, and can include:

- **Communication to Attendee** – a Merge Doc or other communication (separate from a registration confirmation) is sent to whoever completed the registration.
- **Communication to 3rd Party** – a Merge Doc or other communication is sent to a third party.
- **Alert** – an alert is raised in the Alert Panel, along with any generated notifications by email or text message.
- **Data Creation** – additional Notes, Marketing Tags or Packages are automatically generated.
- **Call App Store API** – an external API link is established and an external process started. This is typically managed by EventsAir development and not by an EventsAir user on their own.

Each Submit Action will have different options based on its defined operations, as described below.

Note: You can define multiple submit actions, giving you greater flexibility in how you use one interactive (registration) site.

Communication to Attendee

Upon site submission, a Merge Doc or other communication (separate from a registration confirmation) is sent to the contact. When selecting this submit action, you'll see the same options that you would for sending a standard Merge Doc or other communication.

You can apply a filter, so for example you could send a secondary email **ONLY** to attendees who register as a speaker or exhibitor, but not to regular attendees or staff.

Communication to 3rd Party

Upon site submission, a Merge Doc or other communication is sent to a third party defined in this Submit Action. Again, you'll see the same options you would when sending a Merge Doc or other communication, with the addition of two fields:

- To Name
- To Address

For example, you could choose to send a separate communication to your Exhibitions Manager every time a contact registers as an exhibitor.

Alert

Upon site submission, an alert is raised in the Alert Panel, along with any generated notifications by email or text message. You can define an alert level along with an alert message that is generated by this Submit Action.

You can also add the Attendee Name to the alert message. For example, your message might read "Attendee Check-In" and be followed by the attendee name.

You can also filter on any field in EventsAir, allowing you to raise alerts only when specific criteria are met, such as a particular registration, function, accommodation or travel type has been selected.

Data Creation

Upon site submission, additional Notes, Marketing Tags or Packages can be automatically generated. Each category will display appropriate options for these:

Notes

You can select your Note Type and Note Content along with any custom fields associated with the Notes Module.

Marketing

You can select your Marketing Type, and the associated data fields will automatically display.

Packages

You can select your Package Type from a drop-down list of all previously created packages. You can also filter on any field in EventsAir, making it possible, for example, to generate a package ONLY if a Speaker registration is entered.

Call App Store API

Upon site submission, an external API link is established and an external process started. This is typically managed by EventsAir development and not by an EventsAir user on their own. This offers sophisticated functionality and can perform a wide variety of actions and synchronizations with external third party applications. Please contact EventsAir support to set up an initial conversation with the EventsAir team to discuss your required functionality.

Site Details Tab

When working in the main interactive (registration) site builder, under the Details tab you can configure the following:

Details Tab

- **Title** – edit the title of your Registration Site.
- **Alias** – edit the shortened URL alias.
- **Copy URL and Copy QR** – copy the URL or QR code for pasting into other documents, such as emails or brochures.
- **Brand** – easily change the overall style of your Registration Site, using the EventsAir Brand Editor.
- **Currency** – select the default currency for this specific Interactive Site.
- **Override Default E-Commerce Account** – you can assign a different e-commerce gateway just for this interactive site. This is useful if payments will be made on this Interactive Site in a different currency, and so you want to direct financial transactions to an e-commerce gateway that will support your chosen currency.
- **Button Text** – re-define the default button names on the Registration site, such as "Back", "Save", "Cancel", and "Return to summary".
- **Availability** – designate whether the site is live or closed, and if live, give a date range when the site will be

visible to the public.

- **Optional Alert** – create an alert for whenever an attendee registers via this Interactive Site. (For example, you can be alerted whenever someone registers using the special online registration form for VIPs).
- **Analytics View** – configure your site to integrate with your Google Analytics account.

Details – Confirmation Tab

The Confirmation Tab lets you send an email or text to confirm registration (either new or updated). Once you set it up, it will automatically be sent to anyone who completes or updates their registration online via this interactive site. You can choose various options to suit your needs, and you can also send attachments. You can nominate different messages to be sent after a New Registration and/or an Edit Registration action on the website. The types of communications you can send include:

- **Plain Text Email** – this option will send out a plain text email, and you specify the following:
 - **From Name** – the name you want your attendees to see in the "From" field of the email.
 - **From Address** – the email address you want your attendees to see in the "From" field of the email.
 - **BCC** – you can add any BCC (Blind Carbon Copy) email addresses here.
 - **Subject** – create a subject line for your email.
 - **Attachments** – you can add an attachment here.
 - **Body of your message** – enter the text of your message here.
 - **Merge fields** – you can merge a wide selection of data fields from your registration database into the body of the plain text email.
- **HTML Email** – similar to a plain text email, but you can use standard HTML formatting for the body of your message. (The other fields are filled out in the same way as you would for a Plain Text email.)
 - **Body of your message** – Press the **Open HTML Editor** button to enter, edit, and format the text of your message.
- **Merge Document** – lets you select a pre-written merge document to be sent out as your confirmation email. You can still define the From name and address, BCC, and subject fields here. The Merge email itself would be something you have built already in the Communications tab.
- **Text Message** – if you have configured EventsAir to work with your Text Message provider, you will be able to send out confirmations via text message. If you choose this option, you can configure the following:
 - **Sender Number** – the number used for all text message communications for your organization.
 - **Body of your message** – enter the text of your message here. You will have a full HTML text editor to format your message.
 - **Merge fields** – you can merge a wide selection of data fields from your registration database into the body of the message.
- **Plain Text Email** – this option will send out a plain text email, and you will enter the following items:
 - **From Name** – enter the name you want your attendees to see in the "From" field of the email.

- **From Address** – enter the email address you want your attendees to see in the "From" field of the email.
- **BCC** – enter any BCC (Blind Carbon Copy) email addresses here.
- **Subject** – enter your email subject here.
- **Attachments** – select an attachment to be included with this communication.
- **Body of your message** – enter the text of your message here.
- **Merge fields** – you can merge a wide selection of data fields from your registration database into the body of the plain text email.
- **HTML Email** – similar to a plain text email, you can create a confirmation message that can be formatted with standard HTML formatting.
 - **From Name** – enter the name you want your attendees to see in the "From" field of the email.
 - **From Address** – enter the email address you want your attendees to see in the "From" field of the email.
 - **BCC** – enter any BCC (Blind Carbon Copy) email addresses here.
 - **Subject** – enter your email subject here.
 - **Attachments** – create an attachment to be included with this communication.
 - **Body of your message** – Press the **Open HTML Editor** button to enter the text of your message. You will have a full HTML text editor to format your message.
 - **Merge fields** – you can merge a wide selection of data fields from your registration database into the body of the email.
- **Merge Document** – lets you select a pre-written merge document to be sent out as your confirmation email. Choosing this option lets you define the following:
 - **From Name** – enter the name you want your attendees to see in the "From" field of the email.
 - **From Address** – enter the email address you want your attendees to see in the "From" field of the email.
 - **BCC** – enter any BCC (Blind Carbon Copy) email addresses here.
 - **Subject** – enter your subject here.
- **Text Message** – if you have configured EventsAir to work with your Text Message (SMS) provider, you will be able to send out confirmations via text message. If you choose this option, you can configure the following:
 - **Sender Number** – the number used for all text message communications for your organization.
 - **Body of your message** – enter the text of your message here. You will have a full HTML text editor to format your message.
 - **Merge fields** – you can merge a wide selection of data fields from your registration database into the body of the message.

Details – Search Engine Optimization (SEO) Tab

On the SEO tab you can enter details such as Meta Keywords and Meta Description that will be embedded in your registration page, to help internet Search Engines (like Google) index your page. Correctly setting up this area can help your website appear higher up in the list of internet search results, based on key phrases you specify.

Details – Messages Tab

The Messages tab lets you change the default site messages that a visitor will see if your registration site is not yet

open, or if registrations have already closed.

Details – Localization Tab

The Localization Tab is where you can override the default language for your specific Interactive Site or portal. Options on this tab include:

- **Override App Default Language** – choosing this option lets you define a new translation set for this site or portal.
- **Base Language** – choose the base language for this site or portal.
- **Category** – the default is all categories, or you can select a sub-category from this list.
- **Search** – this field lets you enter a search phrase so you can locate a specific translation.
- **Translation List** – this list displays the original text phrase on the left and the translation (Language Override) on the right.

Tip: Language settings can also be configured at a global level in [Application Setup](#). Language setting changed here in Interactive Site Setup will only change the single site you are working on. [Read more about Localization in this article.](#)
