

Attendee management – Module items

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[Read more here about overall Attendee Management.](#)

When you first click on the Attendees Panel, you'll see a blank Attendee record screen, with sections for **Contact** details and all other available modules.

After you select an attendee (via the [Search](#), or the Recent and Pinned Records section), **that individual's module details/items will be displayed.**

Within various modules listed under an attendee record – **Registration, Accommodation, Travel** and so on – you can click on an item to review and edit the details.

If this attendee is also involved in other aspects of your event, such as **Presentations** (they're a speaker, or reviewer); **Exhibitions, Sponsorship, CE courses** etc, then you can also see (and usually add or edit) under the relevant modules any bookings, information, payments, and more for this attendee.

Adding items (where applicable)

Attendees usually add new details and items to their record themselves, when they make bookings via an interactive (registration) site, app, or portal. However, you can manually add a new item to an attendee record, (e.g. a note, marketing tag, or registration/accommodation/travel etc item). Just use the + plus icon in the top right corner of the module.

Editing or deleting items

Ensure you understand the financial implications of making any changes to items on an attendee record, in modules such as registration, functions, accommodation, travel, or any item involving payments.

Other tabs in modules (Custom fields, Payment Schedules, Tax)

For almost all of the modules listed below, when you click into an item within a module, the default view is under the **Details** tab.

There will also be a "Custom Fields" tab in a module if you created custom fields (in Setup) for that module.

Some modules will also show tabs for **Tax** and/or **Payment Schedule**, where you can see and modify the details of these for the specific item and attendee whose record you're looking at.

[Learn more about payment schedules, taxes, and discounts in this article.](#)

Other tabs unique to each module are detailed below.

Attendee record – Contact module

Contact – Details tab

Within the Contact module of each attendee's record, you collect and store details and information about the attendee. You can add custom fields, or just use the default contact fields within EventsAir – you choose which ones to include and mark as mandatory when creating your interactive registration sites.

The **Details** tab may include the following (some depend on what you've enabled):

- Name and Organization
- Photo
- Contact Details – this includes email address and website. The 'email' icon and 'website' icons can be used to quickly send an email or jump to the attendee's website (if applicable).
- Dietary requirements
- Social Media handles/details for this attendee
- Primary Address
- Billing Contact
- Billing Details

Contact – Next Action dropdown

When you have a defined process for managing attendees, you can create a series of "Contact Actions" in the Setup panel (Contact module). Then you can go into an attendee record and set the "Next Action" field accordingly, choosing from a dropdown menu of the actions you previously created. This allows you to search and filter elsewhere in EventsAir – for example, the 'Next Action' might be "post gift pack" and you can filter on that to print out address labels.

Contact – Privacy settings

Attendees can choose to opt in or opt out of marketing communications. Because anti-spam legislation and penalties are becoming increasingly strict, it's important to distinguish marketing messages and emails from 'account related' communications (such as a confirmation email sent after someone has registered). Opting out of marketing means this person won't receive marketing communications, which is also why you need to choose the appropriate check box (labelled "This is marketing") in the Communications panel if your message isn't based on an existing business relationship.

This is also where data processing and 'visibility' (information sharing in apps/portals) is recorded for the attendee.

Contact – Settings

Here, you have the option to swap first and last names (useful for some countries), use a secondary address, or make this record inactive.

Contact – Online Account

This section will appear once an attendee record has been created. The online account is paired with a contact record but also exists separately. This section lets you define an online account email and password separately from the normal login and password process for registration. Settings include:

- **Edit Online Account** – change the email address for this online account, manage password option, or disable the online account.
- **Reset Password** – send an online account password reset email.
- **Account Disabled** – click here to temporarily disable this online account.
- **Last Logon** – see the last time this online account logged in to a portal or registration site.
- **App PIN** – you can see the App PIN (also used for some portals or registration sites).

Contact – Check-In Alert

You can create an alert to be sent when this attendee checks in. This can be used as an extra along with other check-in alerts you may have set up, e.g. for certain registration types.

Contact – Data Processing Log tab

In this tab, you can see a record of any data-related actions for this attendee (for example, included in Comprehensive Export or Standard Export, or other reports).

Contact – Access Log tab

In this tab, you'll see anything relevant to this attendee's access to the event, sessions and functions (such as checking-in or being scanned in or out), with details of times and dates.

Other modules in an attendee record

Notes (in attendee records)

Before you can add a Note, you need to have the Note Type set up (this is done in Set Up panel). [Read more here.](#)

Items within the Notes module on an attendee record will show comments, dates, or other specific details about your attendees. Imagine them as yellow sticky notes, but permanently recorded for your convenience. Notes keep other members of your team informed too.

Some examples of different types of Notes:

- **General Notes** – notes about birthdays, spouses, business history, etc.
- **Special Requirements** – items requested by the attendee that don't fit within the default fields of your contact record.
- **Exhibitor or Speaker packet sent** – easily record details when a speaker or exhibitor is sent their information.
- **VIP details** – record important information such as favorite foods, preferred wines, travel preferences, etc.

The above is not a complete list – you can create whatever type of note categories you need.

You should also be mindful of privacy and data protection when using Notes.

Marketing (in attendee records)

This module will only be called "Marketing" in the attendee's record if you haven't change the default Marketing Group title when you set up the marketing tags.

If you have more than one "Marketing Group" (collections of marketing tags), you'll see each of these listed separately in the attendee record.

If there's a Contact Store linked to this event, you'll see those Marketing Groups listed too.

Like notes, Marketing Tags and sub-tags need to be created in the Setup Panel first.

Marketing Tags and sub-tags are powerful tools you can use to collect or add information to an attendee record, so that you can flag or categorize your attendees in many different ways. While the module is called marketing, tags/items in this module are used for a variety of reasons. For example, you can choose to tag/categorize attendees by region, company size, industry sector, special area of interest, number of years in business, t-shirt size, sales potential, previous attendance, or anything else relevant to your event. The possibilities are limitless, and are based on your needs and requirements.

After you set up the tags, you can add them to your registration site so that attendees complete the information when they register. Alternatively, you can manually add the information to attendee records. Then you can then use tags to select groups of attendees through searches/filters, for example for targeted emails, or Bulk Express Actions.

Types of Marketing Tags

The following types of data can be collected within Marketing Tags:

- **Tag only** – lets you assign a basic tag to the attendee record; no other data is collected.
- **Text** – lets the attendee enter free-form text.
- **Numeric** – lets the attendee enter a number.
- **Date** – lets the attendee enter a date.
- **Sub Tag** – lets the attendee select from a list of options (drop-down list or radio buttons).

Communications (in attendee records)

Details appear in the Communications module of an attendee record when you've sent communications to that attendee. You can see a full history of communications, including both emails and text messages. You can select any item to see more information, including date and time sent, and the content of the communication.

For more information on communications in EventsAir, please [click here](#).

Registrations (in attendee records)

Registration – Details tab

Although there may be special circumstances where you don't need this, usually you want to register attendees so you can:

- Collect registration fees
- Categorize attendees appropriately, using registration types (attendee, speaker, exhibitor, staff, VIP, etc.)
- Manage the early, regular and late registration process

This is also important when analyzing the performance of your event.

Within the Registration module on an attendee record, you'll see registration details for that attendee: registration type, payment details, quantity, and paid/unpaid status. Clicking on each line from this initial view will display all the registration details for that item, and allow you to make changes if needed.

[Read more about setting up Registrations here](#).

Registrations – Meeting Preferences & Meeting Diary tabs

These tabs are only visible if you've enabled Meeting Matching and it applies to this attendee. [Read more about Meeting Matching here](#).

Under these tabs, you'll see all meeting preference requests and scheduled meetings (if applicable) for this attendee.

Agenda (in attendee records)

The Agenda section of the Attendee Panel shows all agenda items for that attendee. They may have registered for these via the website, you've added them manually, or they've added them via My Agenda in the Attendee App.

If applicable, this module will also show details of entry/exit for specific agenda items if this attendee was scanned in / scanned out.

[Read more about setting up an Agenda](#).

Functions (in attendee records)

The functions module covers activities, tours, meals and similar activities. You can organize your functions by category (breakout sessions, optional tours, etc.) and manage tasks such as tracking inventory and attendance, collecting fees, and adding functions to the agenda.

Functions are set up within the Setup panel, and can include function groups (which are logical groupings for related functions), and the actual function specifics. You can also define function details, such as location, dates, times, audio-visual requirements, and more.

Within an attendee record, under the Functions module, you'll see a list of all registered functions on the module item. Clicking on any specific Function will open the module and let you edit or view the details.

[Read more about setting up Functions.](#)

Functions – Details tab

Once you click on a function within an attendee record, you can see and edit information such as function, fee type, number of tickets, payment status and more. Depending on what you've enabled in Financial Setup/Preferences, you can add an attendee-specific note for this item. This note is displayed on the actual generated invoice next to the total amount due.

Functions – Guests tab

Any function guests of this attendee for this function item will be visible under the Guests tab. You can edit guest names and check the box when the guest ticket has been collected.

Functions – Itinerary Tab

This is where you can **add** any specific itinerary details for this function, for this attendee.

Itinerary details can be added into **Merge Docs** and will be included in Itinerary docs.

- **Replace Standard Itinerary Information** – if you check this box, what you've put here will **overwrite** the standard function itinerary text for this specific attendee.

Functions – Table Allocation Tab

Under this tab you can see the allocated table and seat for this attendee for the function you're looking at, and can use the "Allocate" button to either allocate or change these details.

Accommodation (in attendee records)

On an attendee record, the Accommodation Module will show you similar details to what you'll see in Registration and

Functions. You can see and edit the hotel booked, check in date, number of nights, and payment information, if relevant.

[Read more about setting up Accommodation.](#)

Accommodation – Details Tab

Clicking on each hotel entry displays the full booking details, including hotel, room type, number of rooms, check-in and check-out dates and more. You can update or amend details here (being mindful of how this will affect your hotel inventory, sub-blocks, and financials).

You can also manually change the Hotel Notification Status for this accommodation booking, for example updating it from "New Booking" to "Confirmed Booking", if your hotel has requested this.

Other options you can see and edit under the Details tab include the "Sharing with" details and Special Requests.

You can manage accommodation deposits – if you're collecting funds on behalf of the hotel, you can track the deposit amount you've sent.

You can also manually and securely **add, update, or remove this attendee's credit card details** stored in the hotel Credit Card Vault. (The Credit Card Vault is a security feature that only allows authorized persons to see credit card details.)

Accommodation – Transfers tab

If you enabled this feature in Preferences, you can collect Inbound and Outbound transfer details to and from the hotel. This information can be shared and reported on, for your transportation vendors.

Accommodation – Itinerary tab

This feature works the same way as it does for Functions, above.

Accommodation – Booking notes tab

Add extra notes or comments specific to the current booking.

Accommodation – Notification History tab

Use this to track any confirmations and other hotel-related communications.

Accommodation – Group tab

This will show details of any Group Inventory related to this accommodation booking.

Travel (in attendee records)

The Travel module in EventsAir lets you manage a variety of travel aspects, including tracking in-bound and out-bound flights, handling airport transfers, and providing detailed itineraries with multiple flights. Fully independent travellers (FIT) and group travel can be easily catered for, and block seat bookings can be made.

[Read more about setting up Travel.](#)

Travel – Details Tab

Within an attendee record, clicking on an item in the Travel module will show you information such as the Sector (travel route); Travel Type (like Sector, these will be based on what you've set up according to your needs); and other relevant information such as the airline or carrier, departure and arrival dates and times, booking status (e.g. amended, confirmed), and all passenger names.

Travel – Itinerary, Booking Notes, and Notification History Tabs

These all work in the same way as they do for Accommodation.

Presentations & Reviews (in attendee records)

Managing your presenter and speaker programs can be an enormous task, taking many months or even years. As part of this process, detailed information about presenters, reviewers, hosts and all those involved with your program must be stored on their respective attendee records. This may include abstracts, biographies, photos, final presentations, details of reviews and more. Other tools such as Run Sheets help you manage this process.

[Read more about managing abstracts and presentations here.](#)

Presentations – Details tab

In a presenter's attendee record, you can see and edit details about their presentation, theme, keywords, paper number, presentation type, status, and time and location (room) for their presentation.

Presentations – Documents tab

You can review the documents associated with this presenter and their presentation: this may include the Abstract, Presentation, Supporting Documents, Drafts, an official Photo, or other document categories you've set up.

Presentations – other tabs

There are separate tabs for the biography, the reviewers associated with this presentation, and audio-visual requirements.

NOTE: You can add someone as a reviewer to a presentation via the Reviewers tab. When you add a reviewer, you need to scroll down to see who you've just added, then save.

Presentations Author (in attendee records)

This 'information only' module will only appear on an attendee record if the presenter and author aren't the same person; this module appears on the author's record. (If you need to edit these details, you'd do so in the Presenter's record or in the Session, in the Setup panel in Presentations.)

Reviews (in attendee records)

This will only be visible within the attendee record of a **Reviewer**. You'll be able to see all presentations this attendee has been assigned to review. (You can add someone as a reviewer in a variety of ways: for example, adding them to a Review Panel, or going into the Presenter's attendee record and using the Reviewers' tab in the Presentations module.)

If you click on one of these presentations, it will jump to the presenter's attendee record, and open the presentations module in case you want to edit any details of the presentation.

Note: EventsAir will not allow a presenter to also serve as a reviewer of their own presentation. If the reviewer is part of a review panel, that reviewer will be automatically removed from reviewing their own presentation.

Session Roles (in attendee records)

This is another "information only" module. It will show if this attendee has been assigned a role (e.g. Host) for an online session.

Exhibitions and Sponsorship modules in attendee records

Payment Schedule and Tax tabs

You'll see these tabs under other modules too but they're especially relevant for Exhibitions and Sponsorship, hence the reminder here.

Under these tabs, which will appear if relevant to how you've set up this module in Setup, you can manually add or change payment schedule items or taxes for this specific booking, or reset to default.

Exhibitions (in attendee records)

To find out more about setting up and managing [Exhibitions and Trade Fairs](#), read [this article](#).

Although you can set up all your preferences in the **Setup Panel under Exhibitions** and allow exhibitors to manage their bookings directly through the **Exhibitor Portal**, there are also many aspects you can manage in the **Attendee Panel**, using the Exhibitions Component.

Within the Attendee Panel / Attendee Record Exhibitions module, you can find the following tabs:

Exhibitions – Details tab

- **Booking Type** – you can specify Exhibitor or Co-Exhibitor and add a company logo
- **Construction** – nominate a Space Only or Standard booking
- **Select** a stand number and see the Floor Plan
- **Select** a Status (Reserved, Confirmed, or Cancellation)
- **Nominate** a Payment Status
- **Add adjustments, discounts or loadings**
- **Specify the date entered**
- **Add notes**

Exhibitions – Profile tab

You can add a text description of the Exhibitor here.

Exhibitions – Brochures tab

You can upload a brochure here, to appear in the Attendee App/OnAIR portal.

Exhibitions – OnAIR tab

If this tab is visible, you can manually override the Stand Type settings here so that your Exhibitor can access options such as 3D Stand Builder, and add a contact.

Sponsorship (in attendee records)

Once you've defined what will be available to sponsors (in the Setup Panel, Sponsorship module), sponsors can manage many aspects of their registration, payment and deliverables directly, via the Sponsorship Portal App. You can also manage elements directly from the Attendee Panel.

Sponsorship – Details tab

Here you can:

- Add a Sponsorship item by using the + plus icon, then choosing a **sponsorship package** from those you've defined in the Setup Panel (Sponsorship module)
- **Select** a quantity
- **Nominate** the status (Reserved, Confirmed and Cancellation). When confirming, you can also indicate the confirmation date.
- **Select** a Payment Status
- **Nominate** a discount
- **Add notes**
- **Add** a company logo

Sponsorship – Inclusions tab

You can add items to be included in a sponsorship package. You can add or cancel inclusions here, mark inclusion items as completed and add notes as required.

Sponsorship – Brochures tab

If you've enabled this feature, you'll see any brochures that have been uploaded.

CE Courses & Credits (in attendee records)

The CE Course module in EventsAir lets you manage all of the continuing education (CE) courses for associations, colleges, universities and other organizations that require CE, and track the credits or points awarded for each.

[Read more about setting up CE Courses here.](#)

You can add a new course for an attendee by clicking the + plus sign icon next to the CE Courses module in their attendee record.

CE Courses – Details tab

When you want to add a course within the attendee record CE Courses module, you can use the **Search** button. You can search by Course Name, Unique Code, Master Course Code, or Series Code (or part thereof).

Tip: If you don't see the results you expect, check the Course Dates in the Search window; these are part of your search criteria. You need to search within a date range before the start of the course.

Under the Details tab, you can also see and edit the course fee type, number of tickets, payment status, attendance status and other details.

Attendance status is especially important as it's here the attendee status for this course will be marked as either:

- Registered
- Attended
- Deferred
- Canceled
- Pending
- In Progress
- No Show
- Not Passed

CE Courses – Itinerary Tab

This works the same way as it does for other modules (Functions, Accommodation etc).

CE Credits (in attendee records)

This module is used to collect CE Credits earned by this attendee. In this module, you can see and edit:

- **Course Description** – this is a mandatory field
 - **Credit Type** – choose from a list you defined during the setup process.
 - **Date earned** – date the credit was earned.
 - **Credit** – usually listed in decimal hours (e.g. 1.5 for a 90 minute course)
-