

How do you set up a separate contact record when an attendee wants to bring a guest to a function?

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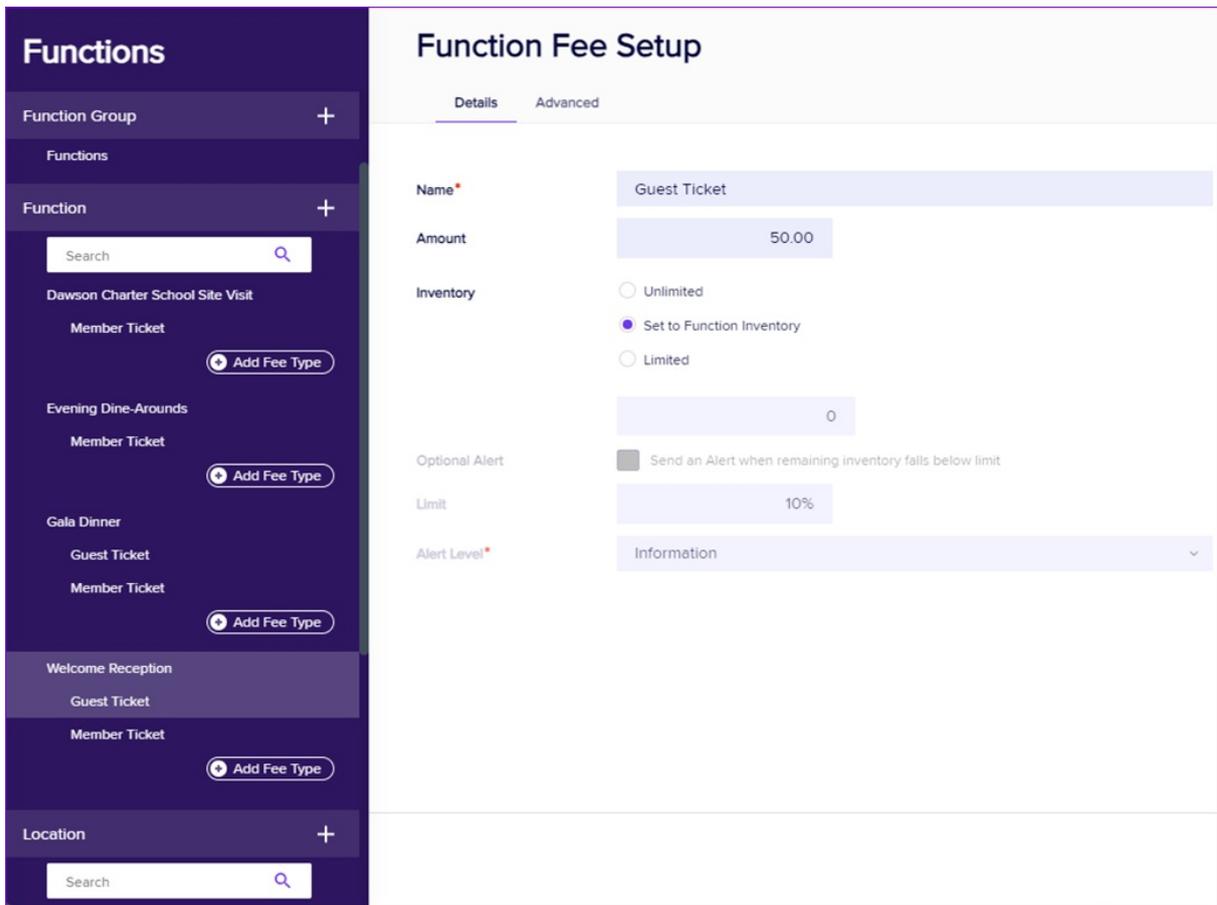
There are a number of different ways to do this – you should also search this help site for related articles.

In Setup Panel

1. Select the Functions module.
2. Choose a function where you want to record guest names.
3. In the “Function Setup”, under Details, select “Create a new linked Contact Record (or match to an existing record...)”:

The screenshot displays the 'Function Setup' interface. At the top, there are several tabs: 'Details', 'A/V', 'Sponsors', 'Run Sheet', 'Itinerary', 'OnAIR', 'Access Control', and 'Advanced'. The 'Details' tab is selected and highlighted with a red box. Below the tabs, there are several sections: 'Location' with a dropdown menu showing 'Please select...'; 'Setup Details' with a large empty text area; 'Food & Beverage' with another large empty text area; 'Agenda Color' with a color selection tool (black and orange swatches), a 'Background' label, a checked 'Bold' checkbox, and an 'Example' button; 'Table Allocation' with a checkbox for 'Enable Table Allocation' and three sub-options: 'Track Ticket Collection', 'Show In Attendee App', and 'Allow Table Selection', each with a checkbox; and 'Guest Names' with three radio button options. The 'Guest Names' section is highlighted with a red box, and the third option, 'Create a new linked Contact Record (or match to an existing record on Email, Last Name, First Name)', is selected.

4. If you want to charge a fee (or increase the fee) for guest tickets, use the “+Add Fee Type” button to create a new Function Fee Type (for example, for Guest Ticket).



Online Panel, Interactive Site Builder

1. Under Functions, add Ticket Fee Types (for example, Member Ticket and Guest Ticket).
2. Expand fee types using the cog element.
3. Open the Details tab and choose your preferred configuration.

For example:

1. Under the main/primary contact fee type, for Guest Names, select “Default to Contact Name”.
2. Under the Guest fee type, for Guest Names, select “Record Guest Names”.

Gala Dinner

- Function Information
- Guest Ticket
- Member Ticket
- No Option Selected
- Heading
- HTML
- Image
- Text

Heading
Gala Dinner

Function Information

Member Ticket

Field Name	Member Ticket
Input Type	Checkbox
Selection equals	1 tickets
Payment Status	Inclusive
Display Amount	<input type="checkbox"/>
Guest Names	<input type="checkbox"/> Record Guest Names <input checked="" type="checkbox"/> Default To Contact Name
Allow Discount Codes	<input type="checkbox"/> Discount Code Required <input type="checkbox"/>
Visibility	<input checked="" type="radio"/> Same as component <input type="radio"/> Between From <input type="text" value="DD/MM/YYYY hh:mm AM"/> to <input type="text" value="DD/MM/YYYY hh:mm AM"/> <input type="radio"/> Not Visible
Help Text	<input type="text"/>

Guest Ticket

Field Name	Guest Ticket
Input Type	Number
Minimum	0 tickets
Maximum	10 tickets
Payment Status	Purchase
Display Amount	<input checked="" type="checkbox"/>
Guest Names	<input checked="" type="checkbox"/> Record Guest Names <input type="checkbox"/> Default To Contact Name

On the interactive (registration) site, selecting the Guest Ticket option will open a form asking for names and details:

Welcome Reception
Jun 01, 2025 | 1900 - 2100

<input checked="" type="checkbox"/>	Member Ticket		
<input checked="" type="checkbox"/>	Guest Ticket	AMOUNT 50.00	TOTAL 50.00

Guest Name 1

Title	First Name
Last Name	Organization
Position	Email Address

If you want people to be able to purchase multiple guest tickets, use “Number” as the Input Type for guest tickets:

 Guest Ticket

Field Name	Guest Ticket
Input Type	Number
Minimum	0 tickets
Maximum	10 tickets
Payment Status	Purchase
Display Amount	<input checked="" type="checkbox"/>
Guest Names	<input checked="" type="checkbox"/> Record Guest Names <input type="checkbox"/> Default To Contact Name

Guest names can be confirmed later or entered at the time of registration:

Gala Dinner
Jun 04, 2025 | 1800 - 2100

Member Ticket

Guest Ticket

AMOUNT 50.00 TOTAL 100.00

2

Guest Name 1

Name to be confirmed

Guest Name 2

Name to be confirmed

Title

*FIRST NAME Susan

*LAST NAME Bestfriend

Organization

Position

*EMAIL ADDRESS susan@attendee.com

In the example above, the Guest Name 1 is 'to be confirmed', so the record is created as a guest of the attendee under the "Guests" tab of the primary attendee, but without a name:

Attendee, Margaret

Functions

Details **Guests** Itinerary Tax Table Allocation

ID	Title	First Name	Last Name	Organization	Position	Email Address	TBC
0 39		Margaret	Attendee			margaret@attendee.com	<input checked="" type="checkbox"/> Booking Contact Only
1		Margaret	Attendee (Guest)				<input checked="" type="checkbox"/> New Search
2 40		Susan	Bestfriend			susan@attendee.com	New Search

Guest Name 2 — Susan Bestfriend — has had a separate record created:

Bestfriend, Susan

Functions

Details Guests Itinerary Tax Table Allocation

Function*	Gala Dinner	▼
Fee Type*	Guest Ticket	50.00 ▼
Number of Tickets*	1	
Payment Status*	Guest Of	▼ Margaret Attendee (ID: 39)