January Webinar 2025 - Behind-the-scenes magic - Submit Actions & Packages

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Your video guide to creating and updating Submit Actions and Packages in EventsAir!

This icon in the toolbar of the video shows the chapters, so you can jump straight to the section you're interested in.

Q&A

These questions have been collated from the 3 regional webinars. Some questions were asked by more than one person, so you may not see the exact same wording you used in your question. Also we can only answer in general terms, so bear in mind your specific situation may need a different solution.

[Customer shared how they use these features]

We use Submit Actions for auto accept or auto decline email advice, based on responses on the interactive site. It works well and saves a lot of manual work.

We also use the filtering on Merge Doc content to send 1 email based on different registration types, for multi-location or multi-program events (creates huge efficiencies as we set up 1 email rather that 4 versions of the same one).

NEW ATTENDEE APP

Will you run training on the new Attendee App?
The back end will all be the same, it'll just be a matter of choosing the new theme with a minor change to sponsor image dimensions. Stand by for updates to help materials coming soon.

PACKAGES

When creating a package, can you include multiple registration items? E.g. if I included 10 complimentary registrations, will they all appear in the attendee record of the person who booked them/how are they then allocated?

You can't add multiple registrations into ONE package registration item, so if you wanted to do that, you'd need to create a package with 10 registration items (and as you say, then you'd have the issue of allocating them).

To add multiple registrations that can then be allocated out, you'd most likely add these directly onto a contact record, marking it as group inventory (you'd need to create a group first, too). Then you'd give a Group Contact access to the Group Allocation Portal and they could nominate who'd get the registrations. [To learn more, you can search this help site for Group Management, or talk to our Success team.]

PACKAGES vs LOGIC

How is a package different from using the normal logic function to hide certain fields?

You can do both – use logic to hide certain fields, then use a package to add items later – sorry, not sure if we understood the question correctly. Contact your Success Specialist for more advice on your specific setup.

PRESENTATION ITEMS

We wish Presentation items could be in a package!

Great idea – we can submit to our product team, or you can do this via the support chat widget (select "Product feedback and suggestions") – you could also add a marketing tag and then bulk create. [Customer replied that's what they do, but would save time if it could be in a Package. The issue could be the Presentation module items carry a

LOT of information.]

REGISTRATION SITES

How do you make your site not editable after first entry? I know you can make certain modules like this?

Yes, sorry, it was glossed over a bit — you could either close the site after a certain date, or each module (contact, agenda, registrations, etc.), click the cog icon to edit and then go to the details tab, then set the module to not be editable after initial entry. You have to do this in each module to make sure your whole site isn't editable after initial submission.

Alternatively (if you wanted to) you could create a different Confirmation email for Edited registrations, and different Submit Actions for edited registrations.

VISUALS

In the new UI, can we slide a screen further across (to the left)? (e.g. when building registration sites) / why was it changed?

The idea of the screen not fully sliding across is two-fold: to give a better context of where you are in the platform as you can now see the panel navigation on the left, and also to maximize screen real estate, because there used to be a lot of wasted white space on the right in the old version.

A few things that may help:

- In the builder, once you click into a component (cog icon), it'll go to full screen.
- The latest release 16.1.2 includes some updates that will expand sheets, and also something that's been frequently requested which is more space for logic dropdown selection to make it easier to read all the options.
- You can also try adjusting your browser resolution/screen size if anything is difficult to see.

  Hope that helps!

WAITLIST

What happens if some of the functions in a package is full, and waitlist is activated?

When you setup the package you can select a payment type of Inclusive or; Complimentary or; Waitlist No Payment Required (if activated in the Advanced tab of the module setup).

You could set it up as Inclusive or Complimentary, because you can only allocate one payment type. This won't change automatically and you'll need to update it manually later. To do this, you can use an Event Alert (Inventory

Alert) to send yourself a message once the inventory drops below, say, 20%.

Then change the payment status in the package to “Waitlist No Payment Required” for future registrations and make sure everything updates correctly.
OR create a new package for Waitlist option and change the submit action package in the interactive site. We suggest testing this first also as more information may be needed — contact Support or your Success Specialist if you have questions.

WEBINAR RECORDING

Is the webinar being recorded & how do we access it?

From this webinar onwards, we’ll email out a link a couple of days afterward, but you can also always go to the help centre: help.eventsair.com and look in the webinar library (you’re here right now if you’re reading this 😊)