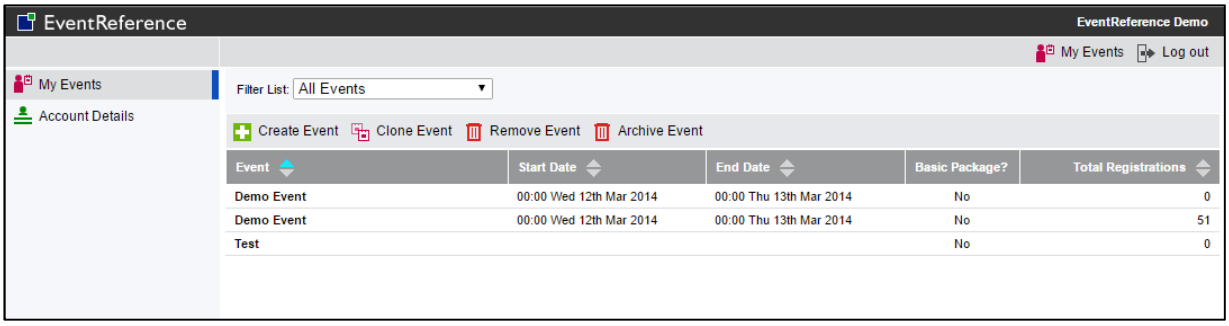
How to:

View your Registration Data

EventReference User Guide #12

EventReference

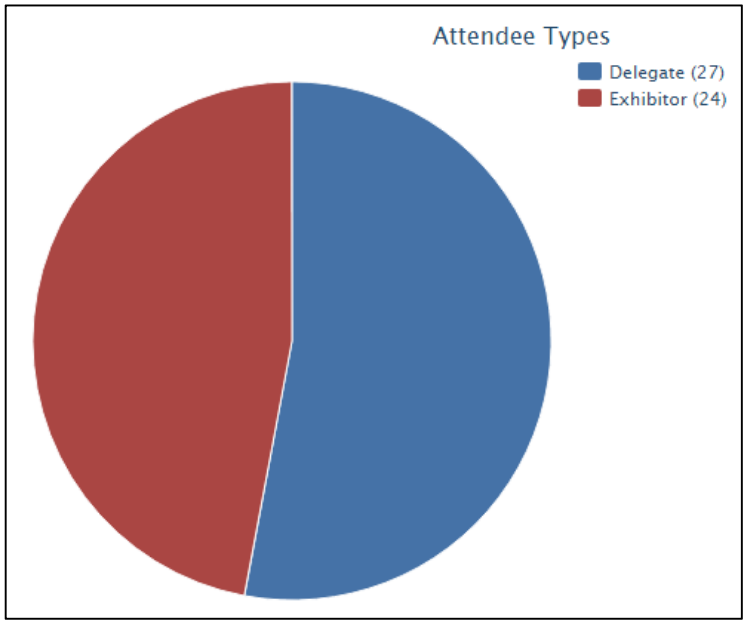
Log in to Event Reference. You will see a list of all the events that are associated with your account.



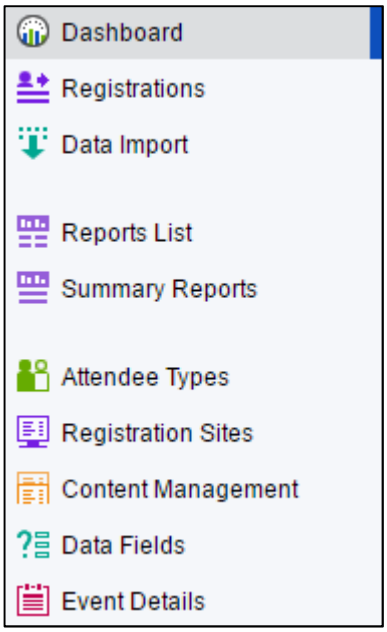
Double click on the event that you want to manage.

<u>Dashboard</u>

The first screen you will see will give you an overview of your registrations to date, in the form of various graphs and charts so you can see at a glance how registration is going for the selected event. This information will be updated when further people register.



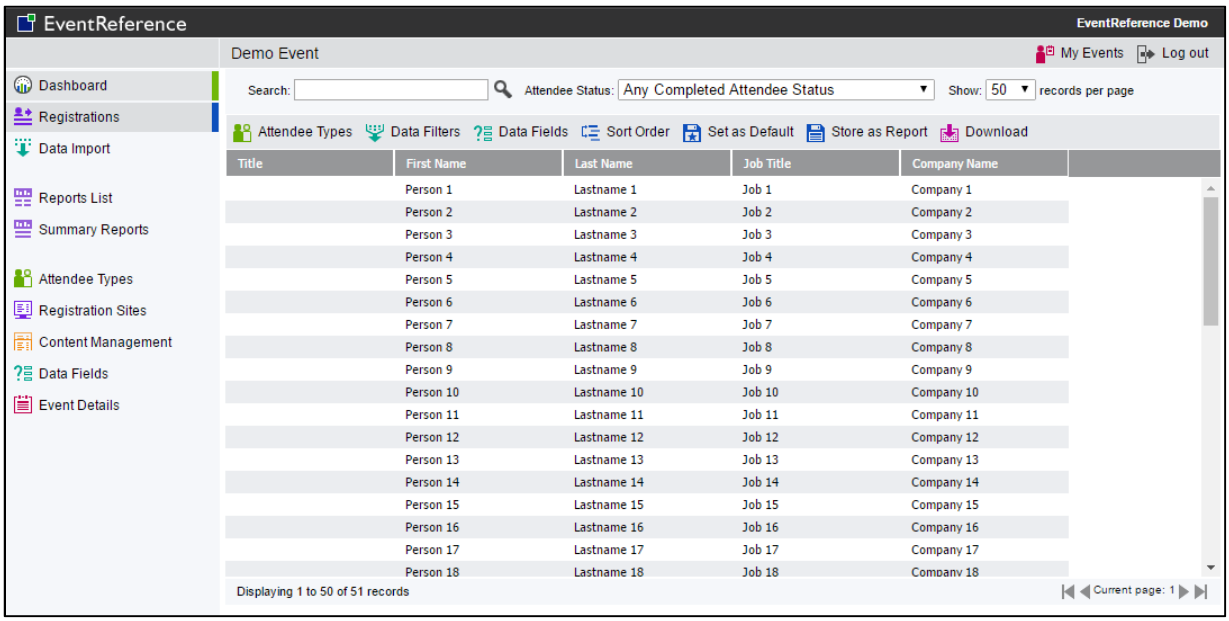
On the left hand side of the page you are given a number of options. These options will vary depending on the package your event is on.



To view your registrations, click on the Registrations option.

<u>Registrations</u>

To view a list of your registrants, click on Registrations. The default list displays all records with the status Registration Complete, for all attendee types and a small selection of data fields.



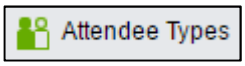
Searching

At the top of the Registrations page there is an option to search for specific records. Type your criteria in the box and click on the magnifying glass or press enter to carry out the search. You can search by First Name, Last Name and Company Name.

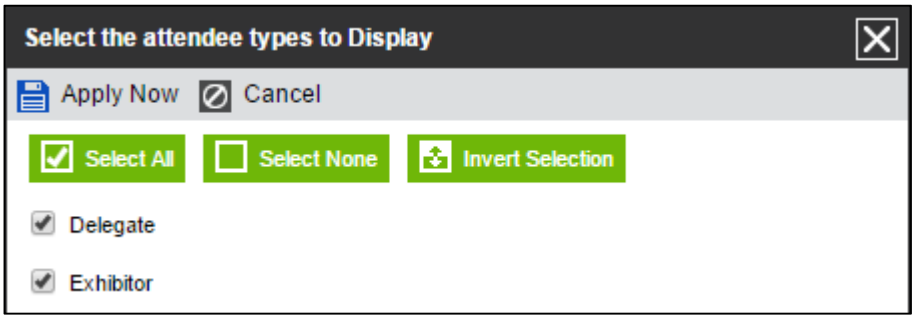
You can further narrow your search by selecting a specific attendee status from the drop down menu, for example you may want to search only those whose registrations are complete, or only those who require approval.

Attendee Types

You can select which attendee types you want to view the data for.

Click 

on the top bar and you will see a list of all the attendee types in your event.



Tick the attendee types you want to view the data for and then click

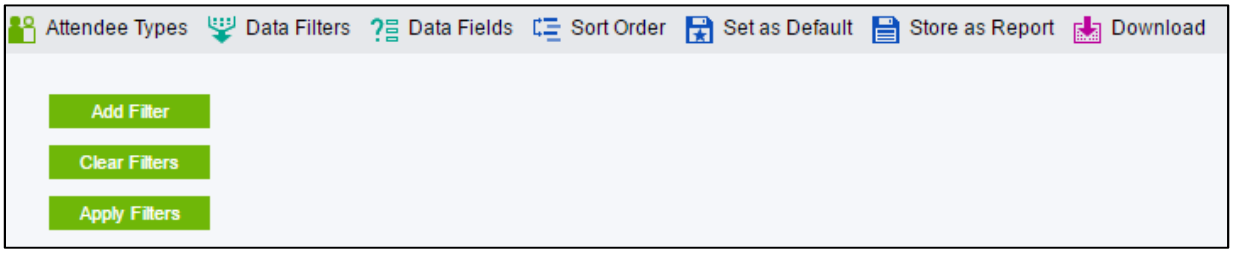
Your data will be displayed accordingly.

Data Filters

You can also use the data filters to display only specific records. This can be useful for reporting on various different criteria.

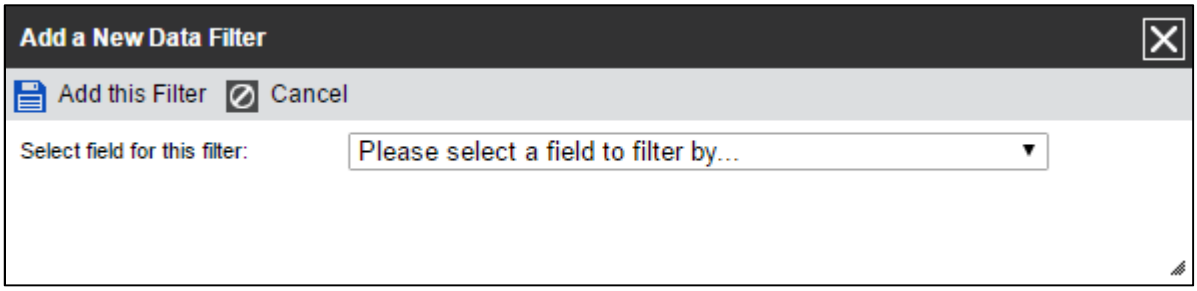
To do this, click

on the top bar.



To add a new filter, click Add Filter

Select the field you want to filter by from the drop down list and specify your filter criteria.



Click Add this Filter and it will appear at the top of the box.

If you want to set additional filter criteria, you should add more filters in the same way.

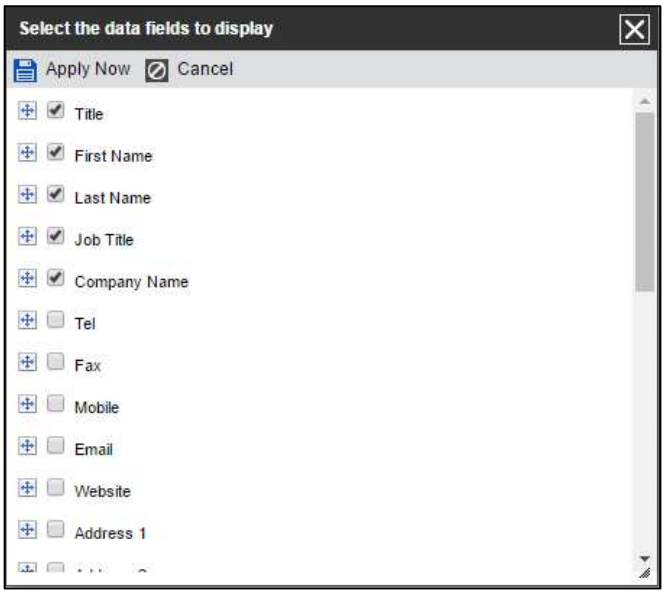
To apply your filters, click Apply Filters and the data will be sorted according to your specified criteria.

To remove the filters, click Data Filters on the top bar and then click Clear Filters

This will return your data list to its unfiltered state.

Data Fields

Click Data Fields on the top bar and you will see a list of all the data fields you have in your database.



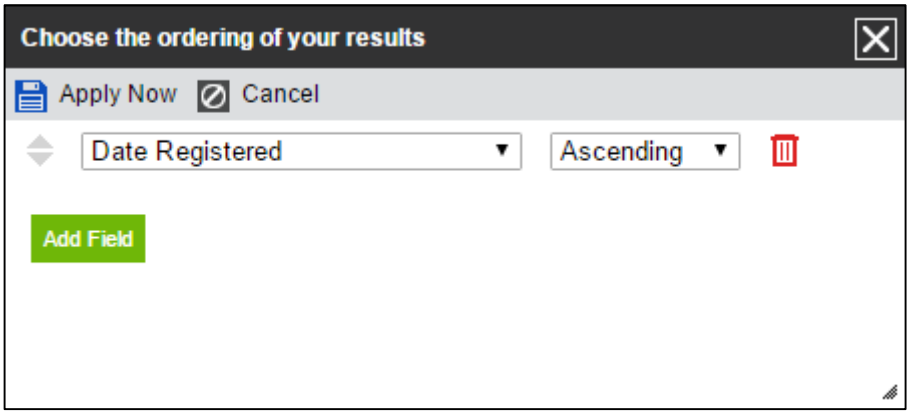
Tick the ones you want to display and then click Apply Now

If you want to re-order the fields, click on the cross icon next to the field you want to move and drag it to the new position.

Sort Order

You can sort the data to display in the order you want, for example in alphabetical order by registrant surname.

Click Sort Order on and you can specify your sort criteria from a list of available options.



Click Apply Now to sort your data.

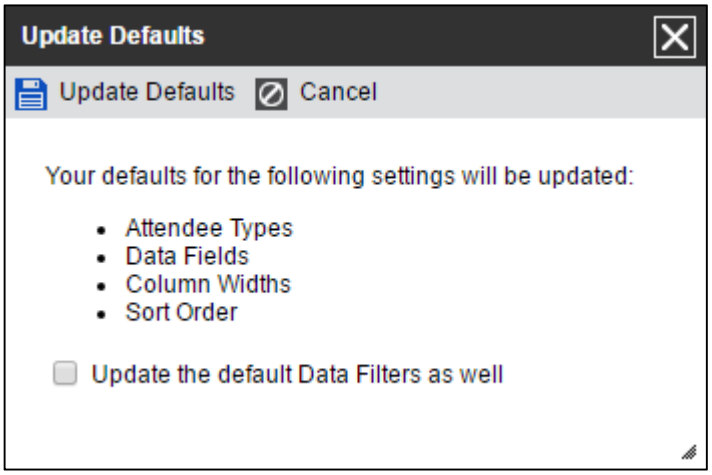
Set as Default

If you know that you want to see the same data fields etc every time you look at the Registrations page, you can use the Set as Default feature to save these settings.

Click

on the top bar.

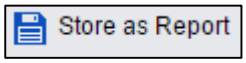
You will be shown a box to let you know which settings will be saved. If you also want to include any filters in this, tick the box.

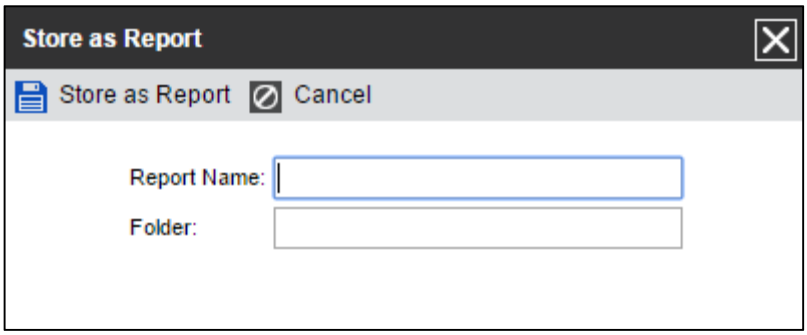


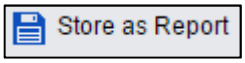
Click

and these settings will be saved.

Store as Report

To store the filtered and sorted data as a report that you can access, click 



Enter the name you want and click 

This report can then be accessed and viewed by selecting

and then double clicking on the name of the report.

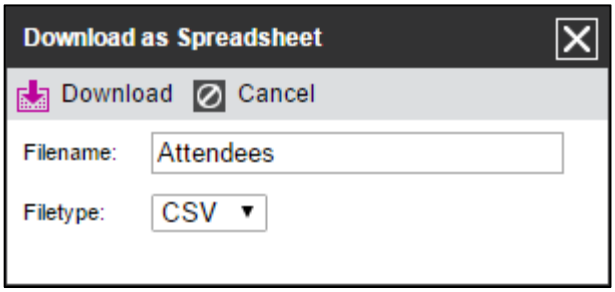
When you run a report, this will always be up to date with the latest data.

Download

To download the current set of data, click

on the top bar.

Enter the name you want the downloaded file to have and select which type of file you want (CSV or XLSX).



Click

and your data will be downloaded to your computer.

EventReference

- Event Registration
- Paid Registration
- Event Management
- WebBadging
- Event Reporting
- WebScanning

YOUR EVENT. YOUR WAY.

Self-service registration & badging

"I've signed up for EventReference"

"I can't believe how easy it is to get all the reports I need"

"I found it to be fast, powerful and easy to use for my event"

"I was able to extract the information easily, which is perfect"

"Being able to target abandoned registrations helped drive my registration numbers up"

What our customers say...

"We have been using EventReference through RefTech for over two years now and in this time we have seen it develop and progress constantly. As a small, independent conference organiser, Opening Doors & Venues needed a straightforward, pay-per-event platform for gathering registrations, that would be easy to manage in-house - it is exactly what EventReference offered us. We use the platform for both free-to-attend and paid-for registrations with multiple attendee types and varied fee structures and find the interface very user friendly, whether it is for building a landing page or formatting the registration form. We must also applaud the RefTech staff for their patience and promptness in providing the support we constantly require - even though at times we ask the oddest of questions!"

Madalina Marincas, OPENING DOORS & VENUES

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