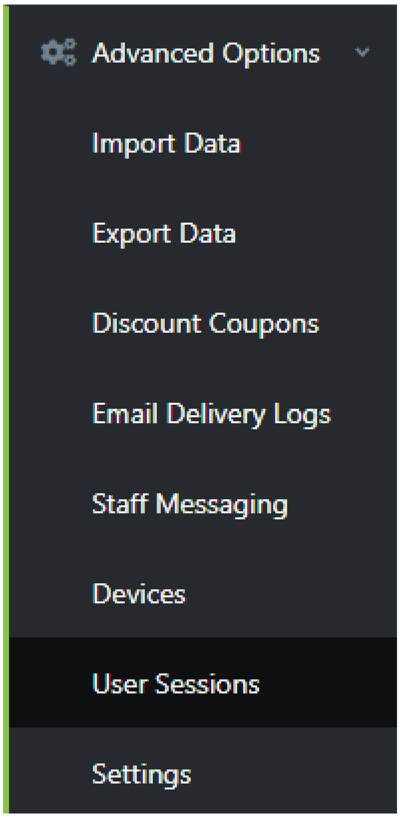
Advanced Options

The Advanced Options section provides you with additional settings, features, and information to maximize your Conference Tracker experience. You can both import data to and export data from your conference, edit payment options, and much more! Here are the features included in this section:



- **Import Data** - The Import Data section allows you to import .CSV files in order to expedite your conference setup. You can import your Attendees, Exhibitors, Administrators, Sessions, Groups, and much more! This section will show you how the importing process works and will provide you with examples on how to achieve this.
- **Export Data** - With our Exports, we allow you to download all the information saved in your account. Exports include attendance logs, attendee information, survey/poll responses, and much more! Exports can be downloaded in a variety of formats.
- **Discount Coupons** - In the Discount Coupons section, you can create coupons to give your attendees in order to provide them with discounts to your conferences. Coupons can be highly customized, letting you set expiration dates, number of usages, and who is allowed to use it.
- **Email Delivery Logs** - If you have used Conference Tracker to send any emails to your Conference guests/staff, you can go to the Email Delivery Logs section in order to confirm if those emails were sent out.
- **Staff Messaging** - The Staff Messaging section allows you to send a message to your staff. They will receive this message through their Conference Tracker app on their phones. You can choose to send a message to all staff members, or a specific member.
- **Devices** - The Devices section shows you a list of staff member's devices that are currently

logged into the Conference Tracker app. This allows you to verify that all devices are working properly while tracking sessions. You can also choose to message any devices to alert the user of any news or updates.
- **User Sessions** - The User Sessions section allows you to view all successful sign-ins to either our Conference Tracker website or any of our Conference Apps. This allows you to verify that users have successfully signed in to their appropriate apps. You can also clear out any old logins in case any users are having issues signing into their accounts.
- **Settings** - The Settings section provides more advanced settings for you to maximize your conference functionality. You can alter conference fees, change payment methods, configure Leads and Attendee app settings, and much more!

Import Data

This is where you go to import your data for the conference. You will need to create CSV (Comma-Separated Values) files in order to import data, which we will go over below. Data you can import includes:

- Administrators
- Exhibitor Administrators
- Exhibitor Representatives
- Operators
- Presenters
- Moderators
- Attendees
- Tracks
- Sessions
- Session Registrations
- Session Presenters
- Session Tracks
- User Groups
- User Groups Members

Learn more about importing your **Attendees**, **Sessions/Workshops**, and everything else to quickly get started.

File Format

Only **Comma-Separated-Values (CSV)** files are supported for **Conference Tracker** imports. This format is broadly supported by many applications including Microsoft Excel; it also can be created using any simple text editor (such as notepad). In the first line of the file the headers must be included (check the list of valid headers below) with commas separating each of the columns you want to include followed by the data/records separating each column by a comma. In the case you need to have a comma in the some of the data/records itself, you can prevent upload and file formatting errors by enclosing the full value in double quotes.

To make it as simple as possible we have defined an import sample for each type of import for you to follow. By creating a file, as explained below, you can directly upload the file to **Conference Tracker** so it can validate it and get your conference information ready for use in the system.

Administrators, Operators, Presenters, and Moderators Import

These **users** will be added to the system from this type of import and this is a quick definition of their role:

- **Administrators** - This **User** type is the one that configures all the settings, import/exports data, and runs the conference. They have the highest level of permissions on a **Conference Tracker** account.
- **Operators** - This **User** type is the one that helps scan attendees, input onsite registrants (**Attendees**), and can print badges/qr labels. These **Users** have limited access to the system and are typically your volunteers/members helping at the conference.
- **Presenters** - This **User** type is the one that will be the speaker at a session. This user is only imported typically to generate a special badge for them.
- **Moderators** - This **User** type has the ability to delete messages on the **Attendee** app and use the **Moderate Messages** function on the **Conference Tracker** website.

Admin/Operator/Presenter/Moderator Import Valid Headers

To import **Administrators**, **Operators**, **Presenters** and **Moderators** you need to specify the following headers:

FirstName	MiddleInitial	LastName	Email	CustomField1
Winnie	T	Pooh	wpooh@contrac.com	5161
Roger		Rabbit	roger.rabbit@conftrac.com	8852
Donald		Duck	duck@conftrac.com	5461
Fred		Flintstone	fred@conftrac.com	5612
Homer	J	Simpson	homerjs@conftrac.com	9523

Required:

- FirstName, MiddleInitial, LastName, Email

Optional:

- City, State, Address, ZipCode, PhoneNumber, Title, Company, CustomField1, CustomField2, CustomField3, CustomField4, CustomField5

Optional but helpful to provide information if using Conference Leads or the Attendee App:

- CompanyDescription, CompanyEmail, CompanyPhoneNumber, CompanyStreetAddress, CompanyCity, CompanyState, CompanyZipCode, CompanyContactFirstName, CompanyContactMiddleName, CompanyContactLastName

Download the example file(.csv)

Exhibitor Admin/Reps Import

These **users** will be added to the system from this type of import and this is a quick definition of their role:

- **Exhibitor Administrators** - This **User** type is the one that configures the **Conference Leads** custom qualifying questions, can perform a random drawing from leads collected, and can mange the Exhibitor Reps for their company. They have no access to your **Conference Tracker** account and only see the (**Attendee**) leads information they or their reps capture.
- **Exhibitor Representatives** - This **User** type is the one that helps scan attendees at the exhibitor booths, use the **Conference Leads** app (if purchased a license), and e-mail leads to themselves. They have no access to your **Conference Tracker** account and only the (**Attendee**) leads information they capture.

Exhibitors Import Valid Headers

To import **Exhibitor Administrators** or **Exhibitor Representatives** you need to specify the following headers:

FirstName	MiddleInitial	LastName	Email	Company
Winnie	T	Pooh	wpooh@contrac.com	"Honey Corp."
Roger		Rabbit	roger.rabbit@conftrac.com	"Carrot Enterprises"
Donald		Duck	duck@conftrac.com	"Quack Inc."
Fred		Flintstone	fred@conftrac.com	"Thelma Rules Inc."
Homer	J	Simpson	homerjs@conftrac.com	"Springfield Corp."

Required:

- FirstName, MiddleInitial, LastName, Email, Company, CompanyBooth, CompanyWebsite

Optional:

- City, State, Address, ZipCode, PhoneNumber, Title, CustomField1, CustomField2, CustomField3, CustomField4, CustomField5

Optional but helpful to provide information if using Conference Leads or the Attendee App:

- CompanyDescription, CompanyEmail, CompanyPhoneNumber, CompanyStreetAddress, CompanyCity, CompanyState, CompanyZipCode, CompanyContactFirstName, CompanyContactMiddleName, CompanyContactLastName

Download the example file(.csv)

Attendees Import

This import is for **Attendees** which are required to track attendance at your conference and are the folks who will be attending.

Attendee Import Valid Headers

To import **Attendees**, you need to specify the following headers:

FirstName	MiddleInitial	LastName	Email	CardNumber	CustomField1
Winnie	T	Pooh	wpooh@contrac.com	1089	C515
Roger		Rabbit	roger.rabbit@conftrac.com	1035	P952
Donald		Duck	duck@conftrac.com	6584	A511
Fred		Flintstone	fred@conftrac.com	1078	B512
Homer	J	Simpson	homerjs@conftrac.com	1812	L122

Required:

- FirstName, MiddleInitial, LastName, Email

Optional:

- CardNumber, City, State, Address, ZipCode, PhoneNumber, Title, Company, CustomField1, CustomField2, CustomField3, CustomField4, CustomField5

Optional but helpful to provide information if using Conference Leads or the Attendee App:

- CompanyDescription, CompanyEmail, CompanyPhoneNumber, CompanyStreetAddress, CompanyCity, CompanyState, CompanyZipCode, CompanyContactFirstName, CompanyContactMiddleName, CompanyContactLastName

Download the example file(.csv)

Sessions/Workshops Import

These are the **Sessions** or **Workshops** that your **Attendees** will have their attendance recorded in using **Conference Tracker**.

Before you import the conference **Workshops/Sessions** it's important that you select the correct **Time-zone** *where the conference will be held*. Bear in mind when setting up the Time-zone for the conference it may not necessarily the **Time-zone** of the place where you currently are.

As an example you might currently in in your offices in New York City, but if the conference will take place in San Francisco, then you should select *“(GMT-08:00) Pacific Time (US & Canada)”*.

Workshop/Session Import Valid Headers

To import **Workshops/Sessions**, you need to specify the following headers:

Name	StartTime	EndTime	Credits	Room	Capacity	Fee	RequiresSignOut	RequiredPresencePctg	OnlineRegistration	CustomField1
Faster Design Decisions with Style Tiles	6/1/2012 10:00 am	6/1/2012 11:00 am	2	.NET Room	2000	197.95	yes	75	yes	FDC
Styles of Redesign	6/1/2012 11:00 am	6/1/2012 12:00 am	3	Mobility	5000	200.95	no	75	no	SOR
Rolling Up Our Responsive Sleeves	6/1/2012 11:00 am	6/1/2012 12:00 am	2	.NET Room	200	30.95	yes	80	yes	RUO
Mobile to the Future	6/1/2012 10:00 am	6/1/2012 11:00 am	2	Mobility	100	50	yes	55	no	MTF
The Future of CSS	6/1/2012 12:00 pm	6/1/2012 1:00 pm	1	.NET Room	450	0	no	20	yes	FOC

Required:

- Name, StartTime, EndTime, Room

Optional:

- Description, Credits, Speakers, Capacity, Fee, RequiresSignOut, RequiredPresencePctg, OnlineRegistration, CustomField1, CustomField2, CustomField3, CustomField4, CustomField5

Download the example file(.csv)

Sessions/Workshops Registration Import

Only use this import if you want to exclude non-registered **Attendees** from being able to sign-in or attend a **Workshop**Session**. We only use** Session Registration **if they must be registered to a** Workshop **in order to attend as anyone else who tries to sign-in to the** Session **will be rejected. == Session Registration Import Valid Headers == To import** Session/Workshop Registration**, you need to specify the following headers:** *Required:* *** Session, Email***

Session	Email
Faster Design Decisions with Style Tiles	eric.smith@conftrac.com
Styles of Redesign	mwilliams@engineerica.com
Rolling Up Our Responsive Sleeves	john.doe@engineerica.com
Mobile to the Future	myers@conftrac.com
The Future of CSS	maryoconnor@conftrac.com

Download the example file (.csv) === User Groups Import === This import is optional, but allows you to create User Groups used for Badge/Certificate/CEU Report printing and emailing, export filtering, and more. == User Groups Import Valid Headers == To import User Groups**, you need to specify the following headers:** *Required:* *** Name** *Optional:* *

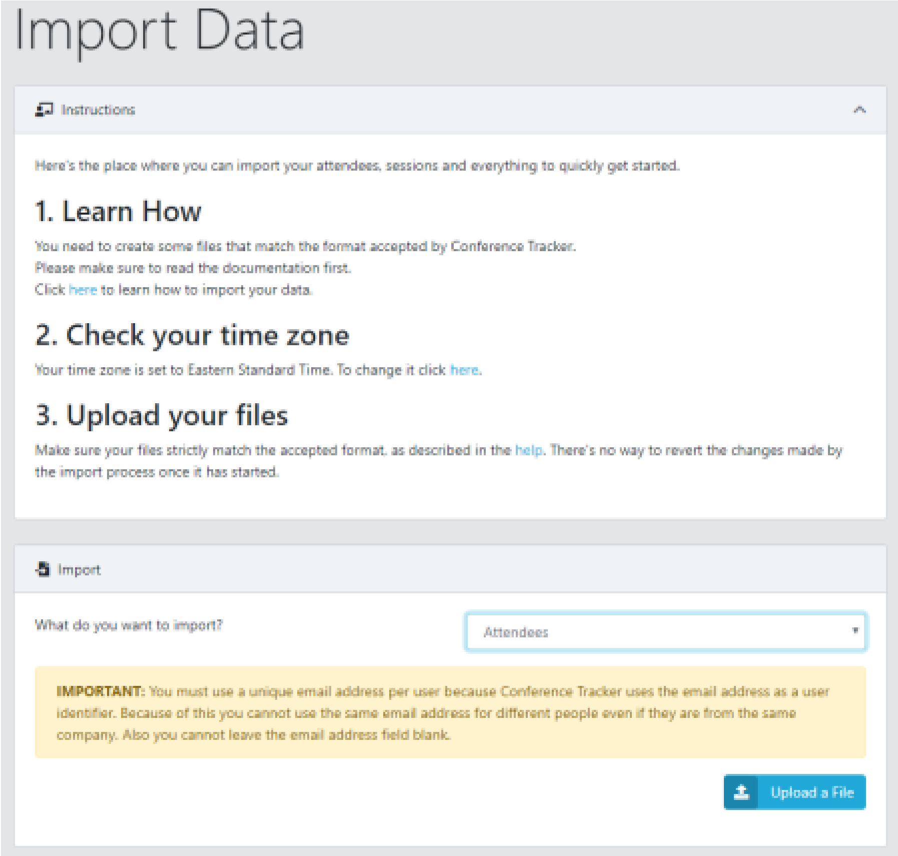
Name	Description
Users with financial aid	This is the group for users with financial aid.
Users with disabilities	This is the group for users with disabilities.

Description Download the example file (.csv) === User Group Members Import === This import is optional but allows you to assign Attendees to groups for Badge/Certificate/CEU Report printing and emailing, export filtering, and more. == User Groups Members Import Valid Headers == To import User Groups Members**, you need to specify the following**

headers: *Required: ** **GroupName, Email**

GroupName	Email
Users with financial aid	wpooh@contrac.com
Users with financial aid	roger.rabbit@conftrac.com
Users with disabilities	duck@conftrac.com
Users with disabilities	homerjs@conftrac.com

Download the example file (.csv) ==== Importing your CSV Files ==== Once you've got the CSV files prepared and ready, let's move on to uploading your files. To import the CSV file you created: - Choose what you would like to import from the Drop Down menu - Press the blue Upload a File button - You will be presented with a Browse window. Search for your CSV file here and press the Open button. - Your CSV file will automatically start uploading! You will see a status window towards the bottom of this section. It will alert you of each step of the process and if there were any errors encountered. Once it completes, it will let you know and your data will be updated to your account successfully! ==== Troubleshooting Import Files ==== These are the possible error messages that you may receive trying to import your CSV files and possible solutions to fix them. === There's already another user in the system with the same email address. === REASON: **This error is caused by duplicate e-mails in any of the User (**Admin**,** Attendee**, etc.) CSV import files. This can also happen if there are blank e-mails in the file.** FIX: **Every User needs a unique e-mail in** Conference Tracker**. If you don't have an e-mail for the** Attendee **it is best practice to use a temporary fake e-mail in a format like "first.last@mydomain.org" However if they will not be scanning into** Sessions/Workshops **then simply delete their record in the** Attendee **CSV import file. === Headers not Valid in Import File. ===** REASON: **Check the corresponding** Valid Headers **Section above to make sure that the Header row in the file is using the exact headers described. Many issues occur when you accidentally add spaces to the headings as this is the normal way you would read them.** FIX: **Simply recheck and update any headers in the CSV import file to match what is required above. === There are multiple users with the same card. ===** REASON: **When the import CSV file has a row duplicated (at least for the card number)** FIX: **Use MS Excel's** Find & Remove Duplicates **option or the MS Excel *Conditional formatting > Highlight Cells that are duplicates* option to isolate and/or remove these rows. === There are users with no email address (Please add a bogus address at least). ===** REASON: **Blank Email for some users being imported.** FIX: **It is best practice to use a temporary fake e-mail in a format like "first.last@mydomain.org" if you do not have an e-mail for someone you are trying to import or find-out their real e-mail as you'll be able to use e-mail heavily during the conference. === There are Exhibitors with no company specified (This field is**



mandatory for this type of users). === REASON: **Exhibitor's Company field is blank and this is a required field on their record.** FIX: **Review the import CSV file and fill-out the** Company **information for each** Exhibitor**. === There are multiple users with the same email address. ===** REASON: **This is a similar issue to the “multiple cards error” as there are multiple users using the same e-mail address. Since e-mail is used heavily in** Conference Tracker **this is considered every user's primary key. This means all e-mail addresses must be unique even if they all typically use a company shared e-mail address.** FIX: **Make sure that the data is not corrupted meaning each user has their proper e-mail address (multiple people were using the same e-mail). It is best practice to use a temporary fake e-mail in a format like “first.last@mydomain.org” if you do not have an e-mail for someone you are trying to import or find-out their real e-mail as you'll be able to use e-mail heavily during the conference. === There are duplicated workshops in the file ===** REASON: **The Name of the session is duplicated in the file** FIX: **This means you need to adjust the names of the workshops so they are all unique. A good way to correct this would be to simply add the day/date and/or start time on the end of the workshop names. === Workshops have to start and end in the same date ===** REASON: **Conference Tracker does not track session lasting multiple days.** FIX: **Typically this is a mistake in the date/time but if you are having a session lasting several days simply break it up into multiple session for each day it occurs for as many hours you are open for that workshop/session. === RequiredPresencePctg field can only be set to nothing or a number between 1 and 100 ===** REASON: **This means you forgot to add at least a number between 1 and 100 in the RequiredPresencePctg field. Or you included the percent symbol which is not required.** FIX: **You set the workshop to require Attendees to sign-out but did not specify the percentage of time (1% through 100% of the session) in the RequiredPresencePctg field. If you do not require them to sign-out of the workshop please leave this field blank or if no workshops require sign-out then exclude the column from the import. === DataType mismatch VarChar not Recognized. ===** REASON: **This typically is if you try to upload a file that requires a date/time field. It can also happen when the fields are too long being imported. However if the dates in your import file look good then you may be trying to import too many characters for a field.** FIX: **This means you must use the time format specified in the above sections like this “MM/DD/YYYY HH:MM” in military time so it understands this information. This can also happen if you accidentally leave the date/time field blank on even a single record. If that does not work it may be the length of the fields are too large. Below is a table of acceptable field lengths for all the imports: == User (Admins/Operators/Presenters/Moderators/Exhibitors/Attendee) Imports ==**

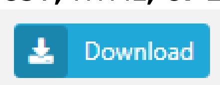
Column Header	Type/Max # Chars	Required/Primary Key
FirstName	70	Required
MiddleName	30	Required (Can be blank)
LastName	70	Required
Email	255	Required/Primary Key
CardNumber	100	Optional
Address	255	Optional
City	80	Optional
State	80	Optional
ZipCode	30	Optional
PhoneNumber	50	Optional
Title	100	Optional
Company	100	(Required for Exhibitors)

Column Header	Type/Max # Chars	Required/Primary Key
CompanyDescription	2000	Optional
CompanyEmail	255	Optional
CompanyPhoneNumber	50	Optional
CompanyStreetAddress	255	Optional
CompanyCity	80	Optional
CompanyState	80	Optional
CompanyZipCode	30	Optional
CompanyContactFirstName	70	Optional
CompanyContactMiddleName	30	Optional
CompanyContactLastName	70	Optional
CompanyBooth	10	Optional
CompanyWebsite	500	Optional
CustomField1	250	Optional
CustomField2	250	Optional
CustomField3	250	Optional
CustomField4	250	Optional
CustomField5	250	Optional

== Session/Workshop Imports ==

Column Header	Type/Max # Chars	Required/Primary Key
Name	150	Required/Primary Key
StartTime	date/time	Required
EndTime	date/time	Required
Room	100	Required
Speakers	255	Optional
Credits	decimal	Optional
RequiresSignOut	boolean (Yes/No)	Optional
RequiredPresencePctg	integer	Optional
Description	1000	Optional
Capacity	integer	Optional
Fee	decimal	Optional
CustomField1	250	Optional
CustomField2	250	Optional
CustomField3	250	Optional
CustomField4	250	Optional
CustomField5	250	Optional

===== Export Data ===== Here at Conference Tracker, our policy is quite simple: Your data is yours. You can be sure of that. We allow users to download all the information saved in their accounts, including the attendance logs recorded, the attendees info and everything else you put in our system. In the Export Data section, you can export any of this data in the following three formats: CSV**,** HTML**, or** Excel Spreadsheet**. To do this, click on any of the blue Download buttons**



next to the type of data you would like to download. Within a few seconds, it will generate a file for you and the blue button will change into a green View File button

. Clicking on this button will begin the file download. Below, you can find a list of all of the types of data you can download from Conference Tracker, as well as what each of them contain. ==== Attendees ==== This export is a complete list of all of the Attendees **that have been added to your conference either manually, via import, or through the registration process. Here is the information included in this export:**

First Name| Middle Name | Last Name | Email | Card Number | Phone Number | Street Address | City | State | Zip Code | Title | Company | CustomField1 | CustomField2 | CustomField3 | CustomField4 | CustomField5 **====Groups==== This export offers a list of each Group you have created in your conference. Here is the information included in this export:**

Group Name | Group Description **====Group Members==== This export offers a list of each Group you have created, along with each member of those Groups. Here is the information included in this export:**

Group Name | Group Description | First Name | Middle Name | Last Name | Email **==== Attendees incl. Reg Info ==== This export is a complete list of all of the** Attendees **that have been added to your conference either manually, via import, or through the registration process. It also includes information completed if they registered through the online registration form, along with any additional custom fields you may have added. Here is the information included in this export:**

First Name | Middle Name | Last Name | Email | Card Number | Phone Number | Street Address | City | State | Zip Code | Title | Company | CustomField1 | CustomField2 | CustomField3 | CustomField4 | CustomField5 | Custom Registration Fields **==== Operators ==== This export is a complete list of all of the** Operators **that help scan attendees at your conference. Here is the information included in this export:**

First Name | Middle Name | Last Name | Email **==== Presenters ==== This export is a complete list of all of the** Presenters **that taught or shared information at your conference. Here is the information included in this export:**

First Name | Middle Name | Last Name | Email **==== Exhibitor Representatives ==== This export is a complete list of all of the** Exhibitor Representatives **that may be using Conference Leads at your conference. Here is the information included in this export:**

Company | First Name | Middle Initial | Last Name | Email | Conference Leads Enabled? **==== Exhibitor Administrators ==== This export is a complete list of all of the** Exhibitor Administrators **that may be using Conference Leads at your conference. Here is the information included in this export:**

Company | First Name | Middle Initial | Last Name | Email | Conference Leads Enabled? **==== Cards / ID Numbers ==== This export is a complete list of all of the** Card Numbers **showing the** Attendees **that have been assigned to the cards either manually or via import. These are the fields that are shown in this export:**

Card Number | First Name | Middle Name | Last Name | Email | Phone Number | Street Address | City | State | Zip Code | Title | Company **==== Sessions ==== This export is a list of all the** Workshops/Sessions **that occurred at you conference. Here are the fields that are shown in**

this export:

Workshop Name | Start Time | End Time | Credits | Speakers | Room | Requires Sign Out | Required Presence Percentage | CustomField1 | CustomField2 | CustomField3 | CustomField4 | CustomField5 **==== Leads ==== This export is a complete list of all of the** Leads **collected for the** Exhibitors **using Conference Leads at your conference. Here is the information included in this export:**

Date | Exhibitor First Name | Exhibitor Middle Name | Exhibitor Last Name | Lead First Name | Lead Middle Name | Lead Last Name | Email | Phone Number | Street Address | City | State | Zip Code | Title | Company | Notes | Custom Leads Questions **==== Raw Swipes ==== This export is all the** Attendance Swipes **information collected while the** Attendees **were scanned into their** Sessions/Workshops **at your conference. Here is the information included in this export:**

Type | Time | Device | Card Number | Room | Workshop | First Name | Middle Name | Last Name | Status **==== Attendance Logs ==== This export is all the** Attendance Logs **information collected while the** Attendees **were scanned into their** Sessions/Workshops **at your conference. The** Attendance Logs **are only showing the first time in and last time out of each** Workshop/Session *(i.e. one record per workshop)***. Here is the information included in this export:**

Date | Workshop | Status | Total Minutes | First Name | Middle Name | Last Name | Email | Phone Number | Street Address | City | State | Zip Code | Title | Company | Card Number | Credits | Custom User Fields | Custom Workshop Fields **==== Attendance Logs (with details) ==== This export is all the** Attendance Logs **information collected while the** Attendees **were scanned into their** Sessions/Workshops **at your conference. The** Attendance Logs **are showing** *(multiple lines per session)* **all the times the attendee swiped in and out of each** Workshop/Session**. Here is the information included in this export:**

Workshop | Room | Status | Total Minutes | First Name | Middle Name | Last Name | Email | Card Number | Credits | Sign-In Time | Sign-Out Time **==== Check-Ins ==== This export shows a list of all** Attendees **that have Checked-in. Here is the information included in this export:**

First Name | Middle Name | Last Name | Date | Notes **==== Check-Ins (with delivered handouts) ==== This export shows a list of all** Attendees **that have Checked-in as well as what and when they have collected** Handouts **at the check-in. Here is the information included in this export:**

First Name | Middle Name | Last Name | Notes | Handout | Handout Delivery Date **==== Conference Registrations ==== This is all the** Answers **for the** Questions **in the** Attendees Online Registration Form **that have completed when the** Attendee **registered through the online registration form or onsite (using the online registration form). Due to the customizable nature of the** Attendee Online Registration Form **this is only an example of the possible information included in this export (if the default fields are left intact):**

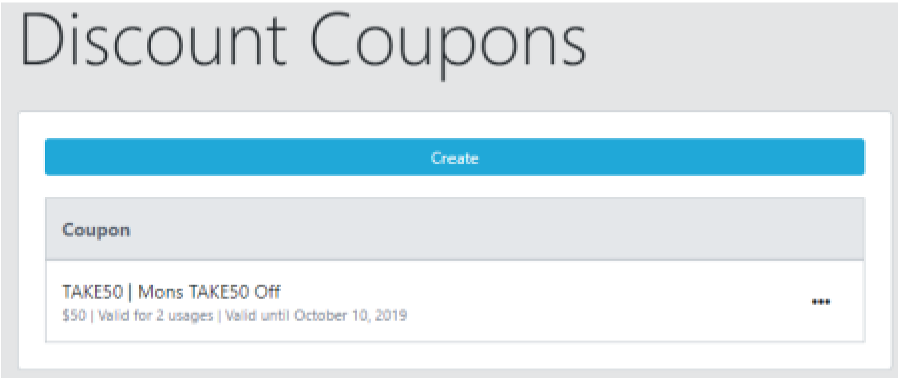
First Name | Middle Name | Last Name | Home Address | City | State | Zip Code | Phone Number | Email | Custom Registration Fields **==== Sessions Registrations ==== This export is a summary of all the** Sessions/Workshops **and the** Attendees **that are registered to them through the** Attendee Online Registration From**, enrolled via import, or manually registered in** Conference Tracker**. Here is the information included in this export:**

Workshop Name | Start Time | End Time | Credits | Speakers | Room | First Name | Middle Name | Last Name | Email | Phone Number | Street Address | City | State | Zip Code | Title | Company **==== # of Sign-Ins per Session ==== This is one of the Conference Analytics exports in which is displays the total number of** Sign-ins **for each of the** Sessions/Workshops**. Here is what fields are included in this export:**

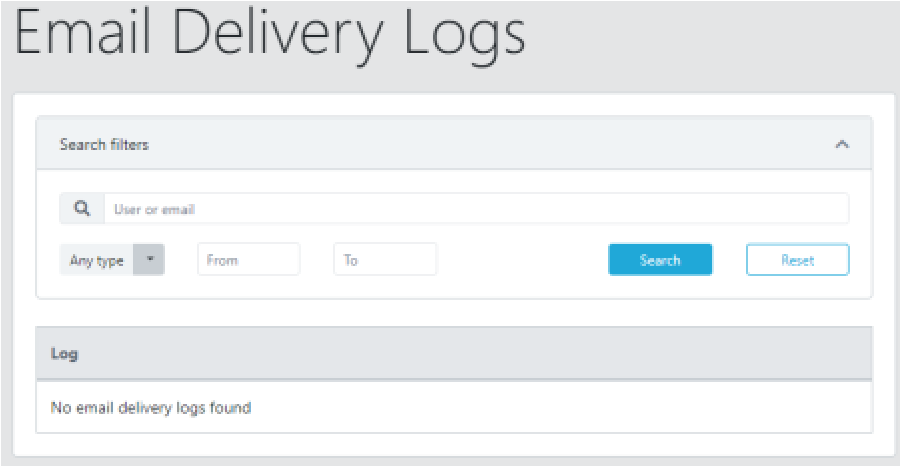
Workshop Name | Start Time | End Time | Credits | Speakers | Room | # Of Sign-Ins **==== # of Attendees per Session ==== This is one of the Conference Analytics exports in which is displays the total number of** Attendees **for each of the** Sessions/Workshops**. Here is what fields are included in this export:**

Workshop Name | Start Time | End Time | Credits | Speakers | Room | # of Attendees **==== Leads App Users ==== This report shows you every** Exhibitor Administrator **and** Exhibitor Representative **that have purchased and used the** Conference Leads **app. This report includes the following information:**

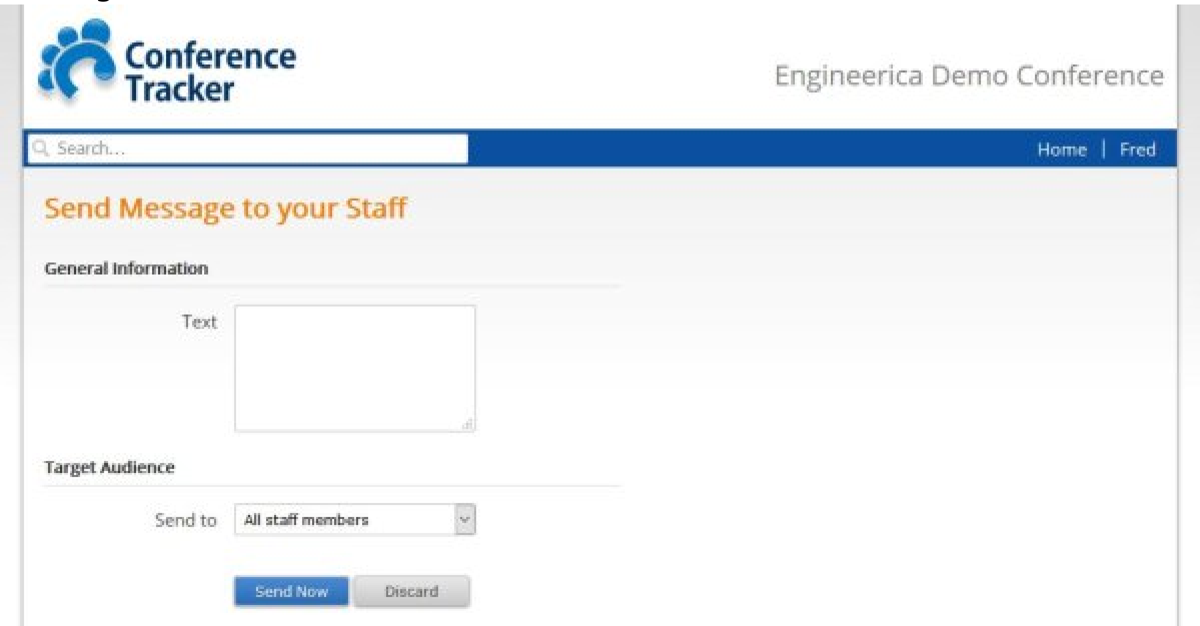
Company | First Name | Middle Name | Last Name | Email | Leads Role | License Fee **===== Microsoft Excel-Specific Reports ===== These are** Conference Attendance Log Reports **that can only be generated in MS Excel (XLS) format as they are subtotaled by each attendees and formatted to look nice. If you have uploaded Workshop Custom Fields then you'll also have the option to see the Attendance Logs data subtotaled by each Custom Field too. ===== Discount Coupons ===== This section allows you to create discount coupons to distribute to your attendees. The discount coupons will be in the form of a code and registrants will be able to enter it upon checking out after completing our online registration form. The discount coupon can reduce the price of registration by any amount you want and can be a flat amount or a percentage. You can create a new coupon by clicking on** Create Coupon**. You will have these options for creating a new coupon: *** Name**: This is the name of your coupon. This is for your reference only, so your registrants will not be able to see this name. *** Description**: This is the description of your coupon. This is for your reference only, so your registrants will not be able to see this description. *** Code**: This is the code that the registrant will use to activate the discount. You can put any combination of alphanumeric characters here. It's recommended that you randomly generate one and enter it here. *** Type**: This is the type of discount. You can use the drop down menu to specify whether the discount will be a flat amount (** Amount**) or a percentage (**Percentage**). *** Value**: This is the value of the coupon. You can set it to any value between 1 and 100. *** Valid for**: This is where you designate what type of registrant can use the coupon. From the drop down menu, you can have the coupon be valid for** All Users**, only** Attendees**, or only** Exhibitors**. *** Valid up to**: This is where you can set how many times the coupon code can be used. When set, the amount will automatically decrease each time it is entered and validated during check out. *** Expiration Date**: This is where you can set when the coupon will expire. The coupon will be usable until the date specified here. After you are satisfied with your settings, click** Save **to finish creating your coupon. It will appear in the main list, along**



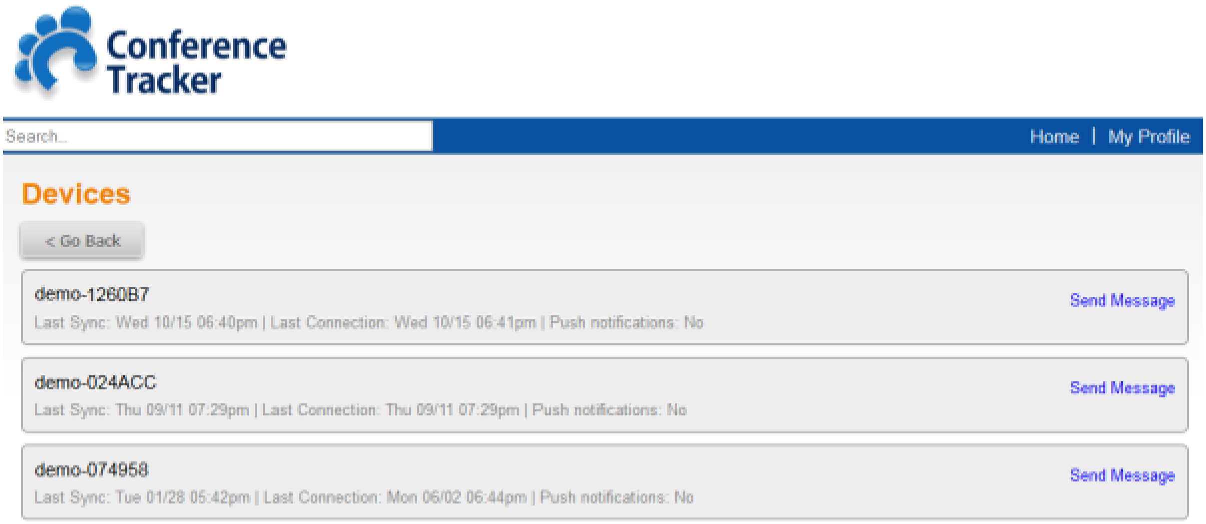
[illegible] ===== Email Delivery Logs =====



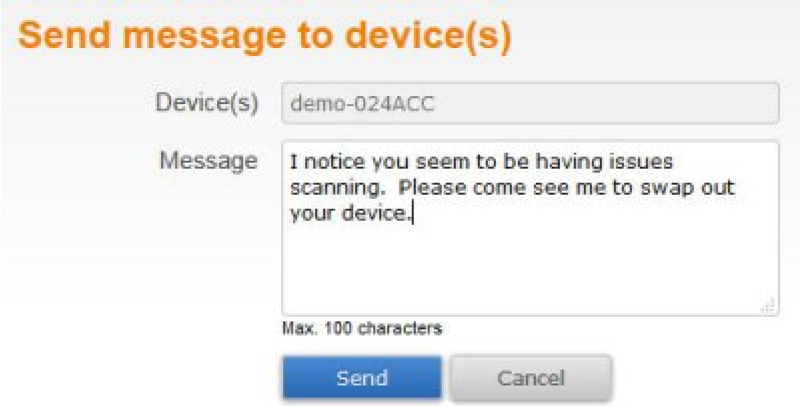
This is where you can view your email delivery logs. These logs will display records of any email sent out through Conference Tracker**. It will show the time and date of the email sent, the recipient, the type, and the subject of the email.** You are able to filter the logs using these options: * Type**: Select the type of email you want displayed here. Using the drop down menu, you can select from** All **emails,** Badge**,** Certificate**,** Transcript**, or** Broadcast**.** * User / Email**: Search for an email sent to a specific user or email address in this text field.** * From**: Display logs starting from a date specified here.** * To**: Display logs ending at a date specified here. ===== Staff Messaging ===== This is where you can send messages directly to your staff members. Any users with the** Operator **role or** Administrator **role and has logged into the** Conference Tracker **app will receive the message sent from this feature.**



Write the message you want to be sent out in the Text **field and then select who will receive it using the** Target Audience **drop box. You can send messages to all your staff members at once or to a specific staff member. ===== Devices ===== This is where you can view your list of devices the Operators are using and can also send messages to them if "Push Notifications" were enabled for the app after the install process on the Apple device.**

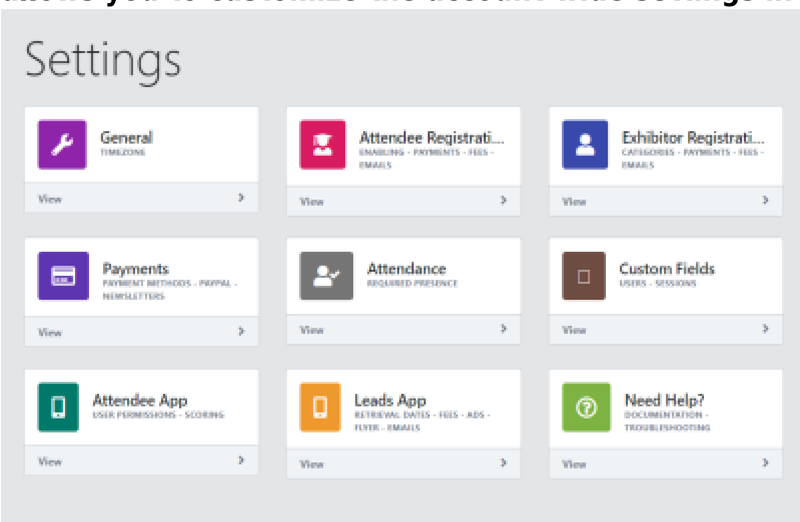


On the far right side notice the “Send Message” link on each device. Simply click this link and type a message (up to 100 characters only) and click the send button.

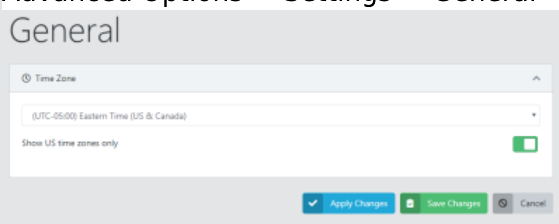


If push notifications are not enabled you may recieve this error:

====User Sessions==== In this section, you can view all attempted/active logins to your conference. These can come from any app or from the Conference Tracker website. ===== Settings ===== This area allows you to customize the account-wide settings in Conference Tracker.

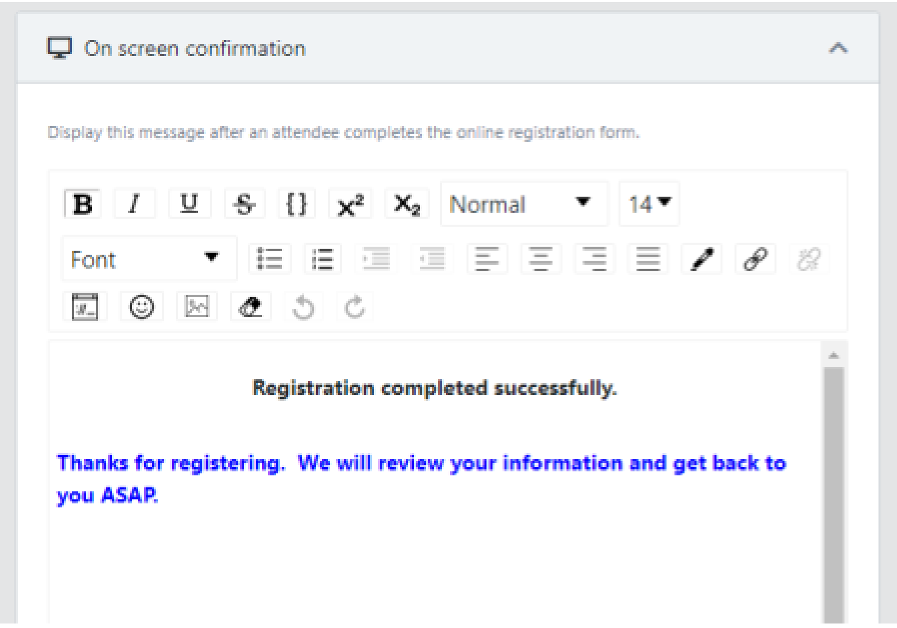


==== General ==== How to Access: Advanced Options **>** Settings **>** General

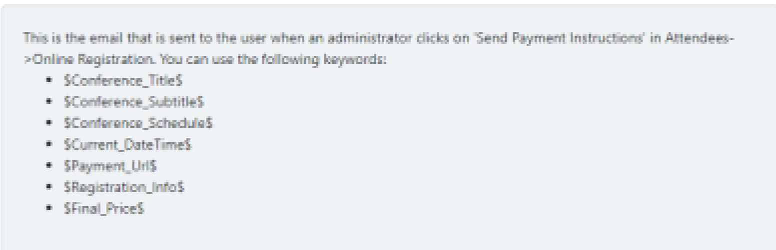


Time Zone: **Set your Time Zone that the conference is taking place in so when you import the data it will sync with Apple devices properly. ==== Attendance ====** How to Access: Advanced Options **>** Settings **>** Attendance Require users to sign-out**: Enable this option if you want users to sign-out after each session. Users will be allowed to sign-out in the middle of a session and sign-in again when they come back. If this option is not enabled, users will only have to sign-in at the beginning of session.** Required presence**: It's a value between 1 and 100 indicating the percentage of time that users must be in a session to gain the**

credits. Overwrite sign-out settings of existing workshops As these values can also be defined per workshop, if you check this all workshops will be overwritten using these values. **- Use this to quickly overwrite all workshops using the sign-out settings. ==== Attendee Registration ====** How to Access: Advanced Options **>** Settings **>** Attendee Registration Enable online session registration**: This allows your** Attendees **to select which workshops they would like to attend and also keeps a running count of registrations to let them know if a session has reached capacity.** Prevent attendees from registering to overlapping sessions**: Enabling this option will restrict attendees from registering to sessions whose times conflict with each other during the online session registration. Additionally, you can change the message that is sent to attendees if they happen to sign up for overlapping sessions.** Base Reg. fee**: Set an amount that registrants must pay upon completing the online registration form. Any fees included in the form will be added on to the** base fee **upon check out.** Base Reg. fee - Early Bird**: Set an amount that registrants must pay upon completing the online registration form. Any fees included in the form will be added on to the** base fee **upon check out.** This fee will override the first Base Reg. Fee depending on the date. Early Bird valid thru**: Set the date for the** Base Reg. Fee - Early Bird **to be valid for.** Auto accept paid registrations**: Enabling this option will automatically confirm the registration if they paid successfully instead of sending the registration into pending.** Auto accept free of charge registrations**: Enabling this option will automatically confirm the registration if there is no fee to be paid instead of sending the registration into pending.** Attendee payment instructions**: Change the contents of the email sent when using the** Send Payment Instructions **option in the registration portion of** Conference Tracker**.** Confirmation Message**: This is a brief message that you can complete using the word-like tools to confirm the users registration to the conference.**

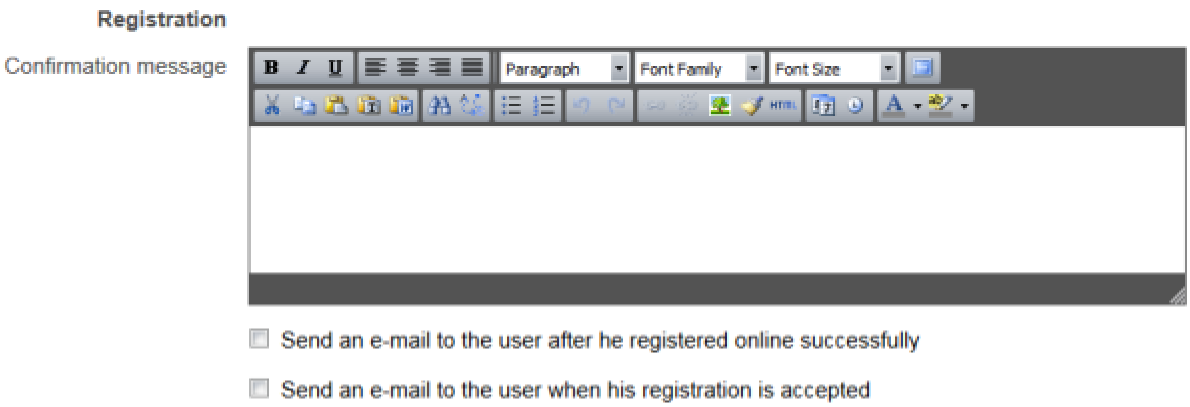


Sending Options**: * Send an e-mail confirmation to the attendee once payment is received. * Send an e-mail to the user after he registered online successfully * Send an e-mail to the user when his registration is accepted (This opens an additional template to be sent specifically for this option). <note>If you choose either of the above** Email **options you'll be asked to customize the email subject and body of the message using the word-like**

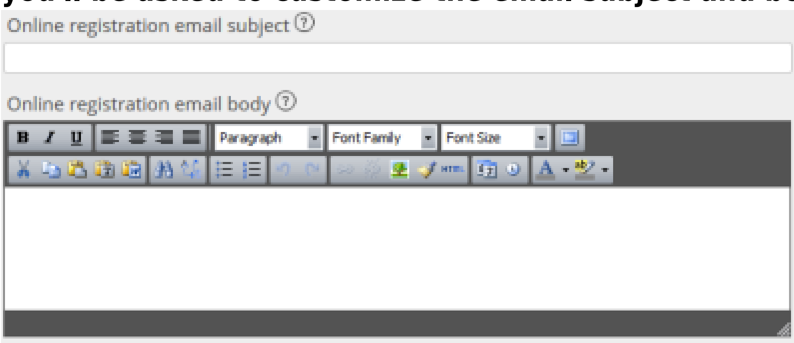


editor below: To add mail merge fields simply click on the blue “More Information” button. This will allow you to see what mail merge options you have available for that field ($Conference_Title$,$Conference_Subtitle$,$Conference_Schedule$,

$Current_DateTime$, $Payment_Url$, and $Registration_Info$). Then simply type or copy them from above to see how helpful these are when trying to personalize the message. </note> ==== Exhibitor Registration ==== How to Access: Advanced Options **>** Settings **>** Exhibitor Registration Exhibitor Categories**: This allows you to create categories for your exhibitors. These categories can be assigned in the company profile. Attendees will be able to search for exhibitors by category using the** Attendee **app.** Base Reg. fee**: Set an amount that registrants must pay upon completing the online registration form. Any fees included in the form will be added on to the** base fee **upon check out.** Base Reg. fee - Early Bird**: Set an amount that registrants must pay upon completing the online registration form. Any fees included in the form will be added on to the** base fee **upon check out.** This fee will override the first Base Reg. Fee depending on the date. Early Bird valid thru**: Set the date for the** Base Reg. Fee - Early Bird **to be valid for.** Free Reps per exhibitor**: Designate the amount of representatives that the exhibitor can register for free. Any representatives registered on the same form surpassing the amount designated will be charged.** Additional Rep fee**: This is the fee charged for registering additional reps.** Auto accept paid registrations**: Enabling this option will automatically confirm the registration if they paid successfully instead of sending the registration into pending.** Auto accept free of charge registrations**: Enabling this option will automatically confirm the registration if there is no fee to be paid instead of sending the registration into pending.** Exhibitor payment instructions**: Change the contents of the email sent when using the** Send Payment Instructions **option while viewing registrations in the registration portion of** Conference Tracker**.** Confirmation Message**: This is a brief message that you can complete using the word-like tools to confirm the users registration to the conference.**

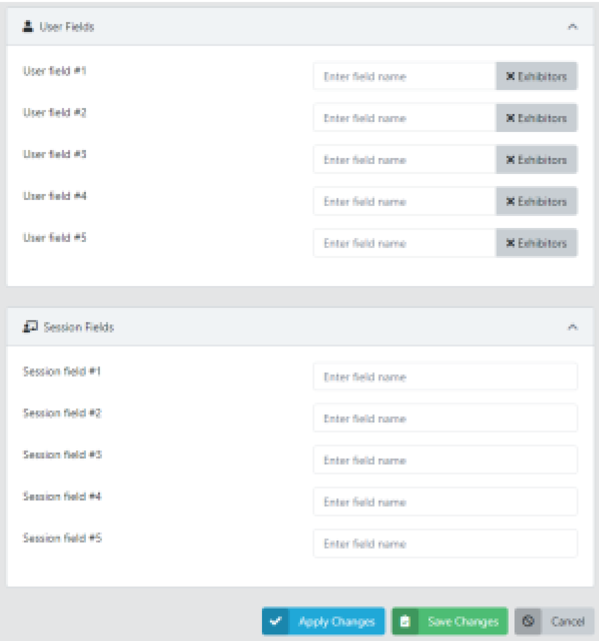


Sending Options**: * Send an e-mail confirmation to the exhibitor once payment is received. * Send an e-mail to the exhibitor after they registered online successfully * Send an e-mail to the exhibitor administrator when his registration is accepted (This opens an additional template to be sent specifically for this option). * Send an e-mail to the exhibitor representative when his registration is accepted (This opens an additional template to be sent specifically for this option). <note>If you choose either of the above** Email **options you'll be asked to customize the email subject and body of the message using the word-**



like editor below: To add mail merge fields simply hover over the circled question mark symbol in the top right of each box to see what mail merge options you have available for that field ($Conference_Title$,$Conference_Subtitle$,$Conference_Schedule$, $Current_DateTime$, $Payment_Url$,

and $Registration_Info$). Then simply type or copy them from above to see how helpful these are when trying to personalize the message. </note> ==== Online Payments ==== How to Access: Advanced Options **>** Settings **>** Payments **These options allow you to enable payments from credit cards through a PayPal account when Attendees and Exhibitors complete their online registration. Here are the options: *** Enable PayPal Payments: **This allows you to start taking payments via Conference Tracker's online registration process. *** Test using PayPal's Sandbox: **This allows you to state that you are testing so no actual payments will be made in this mode. *** Merchant ID / Email: **This is where you would enter your PayPal Merchant ID or if using a personal account your e-mail address. For more information on setting up a PayPal account visit www.paypal.com. *** Enable check payments**: This allows payments to be accepted through a check. *** Enable invoice payments**: This allows payments to be accepted through an invoice. *** Enable cash payments**: This allows payments to be accepted through cash.** Newsletter- Send an email when a Payment for a Newsletter Ad is confirmed**: This option will send a confirmation email to the exhibitor who purchased a newsletter ad. ==== Custom Fields ====** How to Access: Advanced Options **>** Settings **>** Custom Fields **This are displays 5 new custom text fields related to either an** Attendee **and/or the** Workshop/Session**. We offer quite a lot of standard information that can be stored on each** Attendee **and** Workshop **but in case you need more fields for special codes or information that is their purpose. For example, in regards to the** Workshops **these fields can be the** Workshop **"Category" that you might use to group** Workshops **in your exports or even a** Session ID **that may be required by your accreditation organization. Additionally these** Attendee **and** Workshop **Custom fields can be imported into** Conference Tracker **or entered manually. These can be included in our New CEU Transcript which can be emailed to each** Attendee **in the form of a PDF document or you can optionally print them out to send out in the traditional mail service. Below is where you can enter the names of the** Custom Fields **you'll want to use for your** Attendees **and** Workshops**:**



Once you have entered the names of your Custom Fields simply click the Save Changes **or** Apply Changes **button at the bottom of this form. ==== Attendee App ====** How to access: Advanced Options **>** Settings **>** Attendee App **These settings are related to the Attendee app only. Here are the options you can change: *** Allow Attendees to update their avatar**: Enabling this option will allow attendees to upload their own profile picture to the** Attendee **app. *** Show attendee contact information**: By default, this box is unmarked. If you enable this feature, anyone using the Attendee app will be able to access each person's contact information (such as email and phone number) by looking at the their profile. In an effort to keep each attendee's privacy, we leave it up to the event**

admin to decide whether or not to allow attendees to see each other's contact information. * Allow attendees to update their contact info via the attendee app**: Enabling this option will allow attendees to change contact information such as their address and phone number through the** Attendee **app. They will NOT be able to change** First Name, Last Name, **and** Email**. *** Allow attendees to view session registration list via the attendee app**: Enabling this feature will allow attendees to see a list of who is registered for a certain session through the** Attendee **app. *** Score social activity**: After enabling this feature, you can give attendees points for engaging in the community within the Attendee app. Below the checkbox, you can manually set how many points to reward for performing certain actions, such as posting a video or liking a comment. These points are totaled into an overall** Engagement Score**, which can be seen on the Conference Tracker website by going to an attendee's profile. Conference Tracker will also display the attendee's rank based on what their score is relative to other attendees. You can also see an attendee's** Engagement Score **on the Attendee app by checking their profile. Once you're done making changes, click on** Save **on the bottom of the page to finalize your changes. ==== Leads App ====** How to access: Advanced Options **>** Settings **>** Leads App **These options are related to the** Conference Leads **app. Some of these options are specific to your** Conference Tracker Representative**. The options that are available to you are: *** Lead Retrieval Start Date**: Designate the date that your exhibitors can begin scanning for leads at your event. *** Lead Retrieval End Date**: Designate the date that your exhibitors will no longer be able to scan for leads at your event. *** Conference Leads Flyer**: You can click on** Generate Flyer **to create a promotional flyer that you can send to your exhibitors to promote the** Conference Leads **app.** App registration automatic emails**: * Send an email to the exhibitor administrator when their registration to** Conference Leads **is accepted. * Send an email to the exhibitor representative when their registration to** Conference Leads **is accepted. The** Conference Leads Fee **section will be completed by your** Conference Tracker Representative**. You do not need to change any of these values.** Push notification ads**: Enable push ads.** Flyer**: Download a PDF flyer to advertise Conference Leads to exhibitors.

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