Conference Tracker

Conference Tracking Made Easy©

Reference Manual

Version 3.0 – June 2018

www.engineerica.com
Engineerica Systems, Inc.

Engineerica

Table of Contents

Introduction

Conference tracking made easy™

Check out our website for the most up-to-date licensing and pricing information:
www.engineerica.com/conferencetracker

Conference Tracker is a simple web-based event tracking software solution allowing you to track your attendees' attendance at workshops, utilize a powerful ID badge system for easy scanning, print or email completion certificates, and much more! Using the system is easy as following these **3 simple steps!**

1. **Set up your Conference prior to the event**.
    - Easily upload or enable online registration for attendees and customize your conference attendance options to your tracking needs.
2. **Record attendance during the event.**
    - Scan attendees' conference badges to record attendance at the workshops.
3. **Print or Email Certificates & reports!**
    - Print-out customized attendance reports and even email customized certificates to conference attendees after the event wraps up so they can view their attendance.

Benefits

Conference Tracker will **save you a lot of time and effort** by automating the attendance tracking and reporting process for your conference. This automated system **will increase the accuracy of your data**. Here are some of the benefits of this system:

- **Badge Designer:** Design your conference badge and easily print it for your attendees.
- **Quick Sign-in:** To record the attendance data simply scan the attendee badge using the **Apple or Android device's camera**. An optional barcode reader or magnetic stripe readers are also supported. Scanning a badge only takes seconds and is much faster than using pencil and paper to record attendance.
- **Quick reports:** The attendance data then is sent to your online Conference Tracker portal on the Amazon Cloud. The attendance data is transferred in real-time while using an active Wi-Fi or Mobile Internet connection. Simply log in to your online Conference Tracker account to view the attendance reports.

- **Global Accessibility:** You can sign in to the system and view the attendance reports from anywhere with just a web browser. This means you can view attendance reports remotely without having to be at the conference site.
- **Automatic Credit Calculations:** Let Conference Tracker calculate the Continuing Education Units (CEU) or Professional Development Credits each attendee earned for attending the conference sessions.
- **Attendance Certificates Designer:** Use Conference Tracker to create your own customized attendance certificates. Create the layout and text and add signatures and graphics. Conference Tracker will automatically add each attendee's name and attendance credits.
- **Easy Certificate Delivery:** You can print out the attendance certificates and pass them to attendees, or you can leave the delivery to Conference Tracker.
- **Convenient Communications:** Conference Tracker also includes a Messaging Center that allows you to send messages to attendees via email, cellular SMS text messaging, or at sign- in!

Conference Tracker Overview

Use **Conference Tracker** to **automate** attendance tracking for **conferences**, **seminars**, **workshops**, and **training sessions**.

Conference Tracker is web-based system hosted on the Amazon Cloud. To use it, **all you need is a web-browser!** There is **no need to buy/rent hardware if you have** Apple or Android devices **to install the** Conference Tracker **app onto and** access to the system is immediate and global **since the software service is accessible via any online connection.**

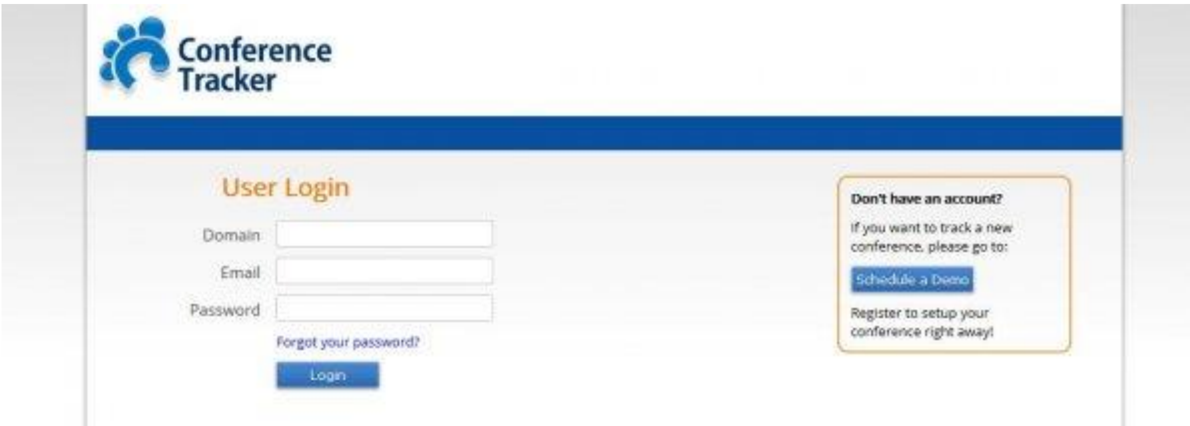
To track conference attendance, simply download the free Conference Tracker app **on your** Apple or Android devices **and login using the account credentials provided with purchase.** ***This app converts your Apple or Android device into a powerful attendance tracking scanner.*** **The attendance data is then transmitted to the Conference Tracker server on the Amazon Cloud.**

Once there, simply log in to your Conference Tracker online account with any web browser to view or print the attendance reports. If you like, you can also print out attendance certificates.

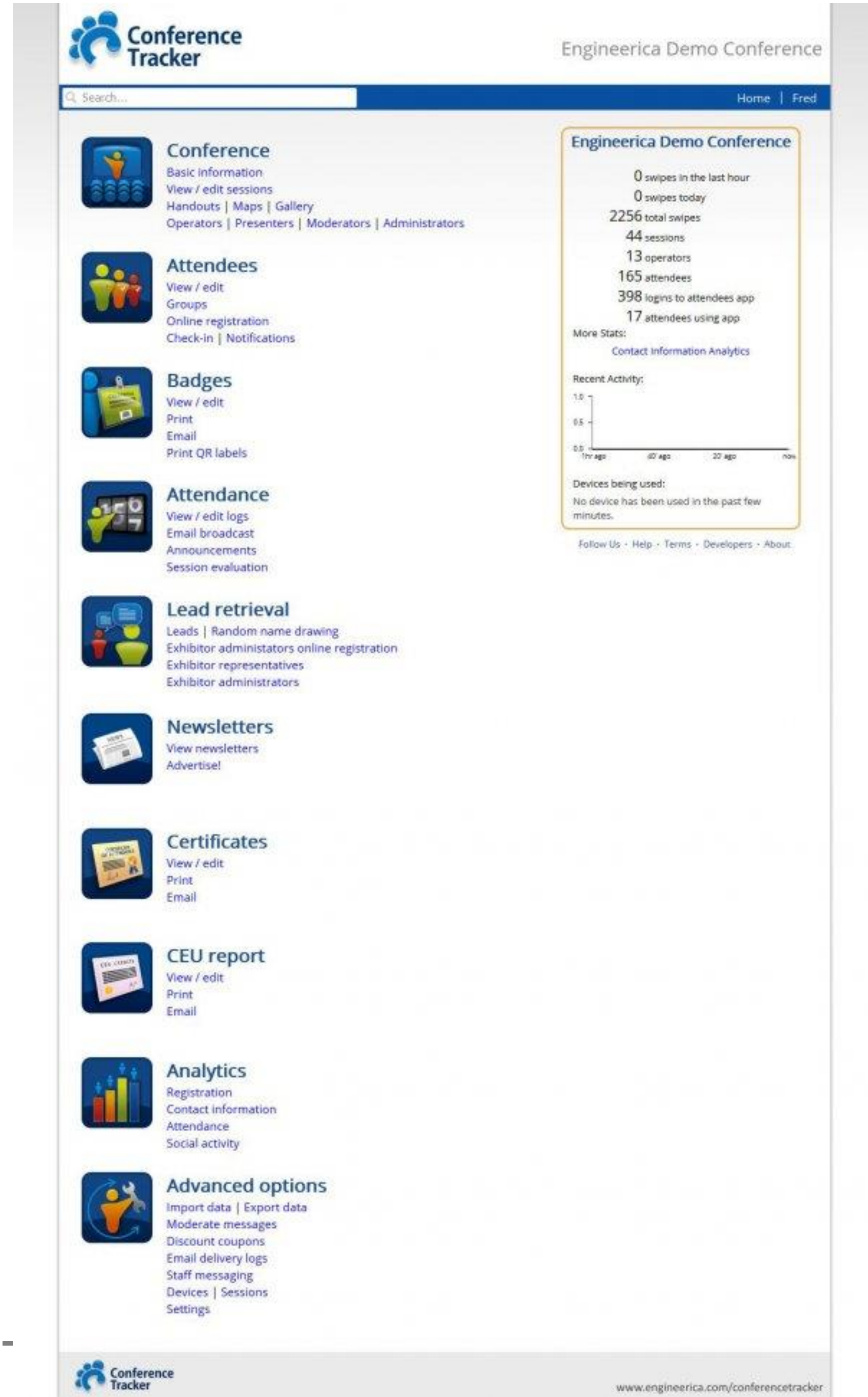
Use this website to learn more about Conference Tracker**. For a** live demo **or for any questions on how** Conference Tracker can work for you, please contact us.

Getting Started

You can get started by accessing your **Conference Tracker** account at http://www.conftrac.com/#Login from any web browser.



Once you get to the **Conference Tracker** website you will be prompted to login. At this point you should enter the **domain**, **e-mail**, and **password** provided by **Engineerica** to login to the **Conference Tracker** software. From here you will see the **Main menu** as shown below:


Conference Tracker
Engineerica Demo Conference
Search...
Home | Fred
Conference
Basic information
View / edit sessions
Handouts | Maps | Gallery
Operators | Presenters | Moderators | Administrators
Attendees
View / edit
Groups
Online registration
Check-in | Notifications
Badges
View / edit
Print
Email
Print QR labels
Attendance
View / edit logs
Email broadcast
Announcements
Session evaluation
Lead retrieval
Leads | Random name drawing
Exhibitor administators online registration
Exhibitor representatives
Exhibitor administrators
Newsletters
View newsletters
Advertise!
Certificates
View / edit
Print
Email
CEU report
View / edit
Print
Email
Analytics
Registration
Contact information
Attendance
Social activity
Advanced options
Import data | Export data
Moderate messages
Discount coupons
Email delivery logs
Staff messaging
Devices | Sessions
Settings
Engineerica Demo Conference
0 swipes in the last hour
0 swipes today
2256 total swipes
44 sessions
13 operators
165 attendees
398 logins to attendees app
17 attendees using app
More Stats:
Contact information Analytics
Recent Activity:
Devices being used:
No device has been used in the past few minutes.
Follow Us · Help · Terms · Developers · About
Conference Tracker
www.engineerica.com/conferencetracker

From this **Main Menu** you have several sections such as **Conference**, **Attendees**, **Badges**, **Attendance**, **Certificates**, **Advanced Options**, and more. With each one of these options you can easily manage your conference. This guide will go through all of these sections in detail to explain how to use the **Conference Tracker** software to its fullest.

Main Menu Options

- **Search** - This option will be available on all screens throughout [Conference Tracker] and allows you to search the account for anything in the system such as **Attendees**, **Attendance Logs**, **Workshops/Sessions**, **Card Numbers**, and more!
- **Home** - This option will be available on all screens throughout [Conference Tracker]. Located on the top right corner of the screen, this option will return you to the **Main Menu**.
- **My Profile** - This option will be available on all screens throughout [Conference Tracker]. The **My Profile** link will be displayed as the **first name of the account** to the right of the **Home** link. This link will provide several options, including **Change Password**, **Switch Account**, **Logout**, and **Help**. **Change Password** will allow you to change the current account's password, **Switch Account** allows you to switch between your licensed conferences, **Logout** will return you to the log in page, and **Help** will direct you to **Conference Tracker's** documentation.
- **Statistics Box** - This item will appear as the **New Conference Check List** when accessing **Conference Tracker** for the first time. After completing the objectives detailed in the box, it will display statistics about the current conference in real time.
- **Helpful Info & Links** - Below the **Statistics box** are some helpful links for conference **Administrators** such as this documentation, developer options, and more.
- **Feedback button** - This option will be available on all screens throughout [Conference Tracker]. Located on the right edge of the website, the **Feedback** button opens a menu that will allow you to submit and vote on ideas to improve **Conference Tracker**.

Conference

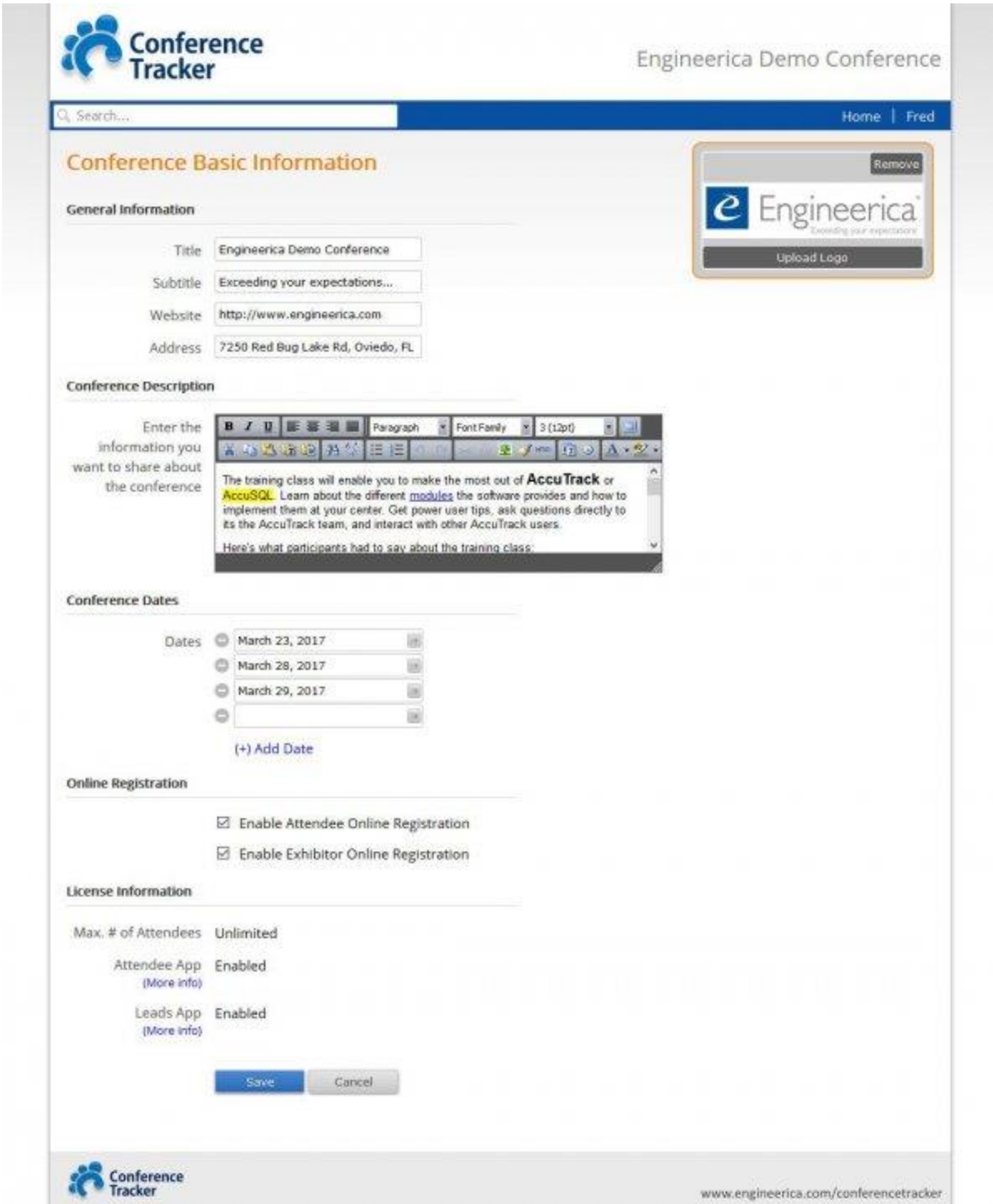
This **Conference** section allows you to configure the following information:

- **Basic Info** - This allows you to configure when and where the conference is taking place as well as enable conference options such as enabling online registration for the **Attendees** and/or **Exhibitors**.
- **View/Edit Sessions** - This allows you to create the **Sessions** or **Workshops** that will take place at the conference based on the **Conference Dates** (enter in the Basic Info) and **Rooms** available.
- **Check-in Hand-outs** - This section allows you to manage **Handouts** that you may want to track which **Attendees** received.
- **Maps** - This section allows you to upload an image or document of a map that can be accessed by attendees using the **Attendee** app.
- **Gallery** - This section allows you to display a slideshow on your browser of the pictures uploaded to the **Attendee** app.
- **Device Operators | Presenters | Moderators | Administrators** - These sections allow you to define the **Users** into one or multiple **Roles** that will help out at the conference. Each role is explained in greater detail below.

Basic Info

The **Basic Info** section allows you to enter the following:

- **Title**: Complete with the name of your conference that will appear in the app for Attendees.
- **Subtitle**: Complete with the slogan for the conference that will appear in the app for Attendees.
- **Website**: Add the conference or organizations website that will appear in the app for guests.
- **Address**: Add the address that this Conference will take place so the Attendees can get directions, find local places of interest, and more from the **Conference Attendee** app.
- **Conference Description**: Write a description for your conference. This will be displayed in the Info section of the **Attendee** app.
- **Conference Dates**: Set up the dates that the conference is going to take place so the Attendees can see what is happening on these days and so you can schedule workshops/sessions on these days.
- **Conference Logo**: Upload a Conference Logo that will be used in the App for Attendees.



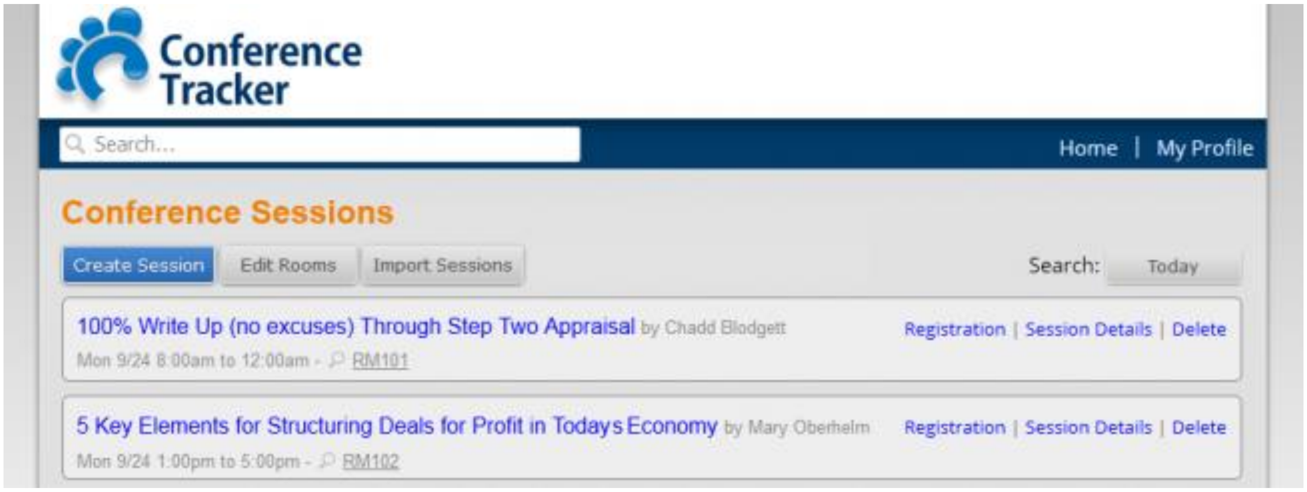
- **Enable Attendee Registration** Check this box to enable Conference Registration. This feature also offers the ability to accept Credit Card or PayPal payments using your own PayPal account through the registration process.
- **Enable Exhibitor Registration** Check this box to enable Exhibitor Registration. This feature now offers the ability to register all Exhibitors at once and collect their payment through PayPal.
- **Upload Logo:** Choose a file from your computer to use as this conferences logo.

- **Max # of Attendees:** Displays your current limit on attendees. Clicking on **Increase Limit** will notify the Conference Tracker support team of your request.
- **Attendee App:** Shows if your account has the Attendee app enabled or not. Clicking on **Enable** will notify the Conference Tracker support team of your request.
- **Leads App:** shows if your account has the Leads app enabled or not. Clicking on **Enable** will notify the Conference Tracker support team of your request.

Once you have set the previously mentioned information you must click the **Save** button for the changes to be set.

View/Edit Sessions

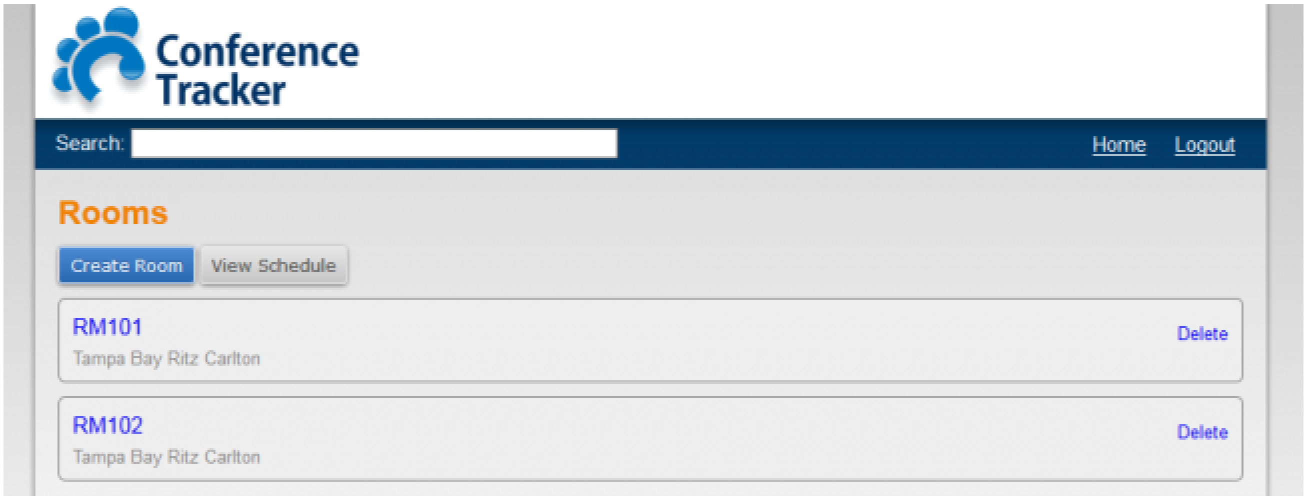
This is the section where you can create or import your workshops and session, as well as add rooms.



You must create your rooms by clicking the **Edit Rooms** button prior to being able to import your sessions/workshops. If you do not, the import will fail every time.

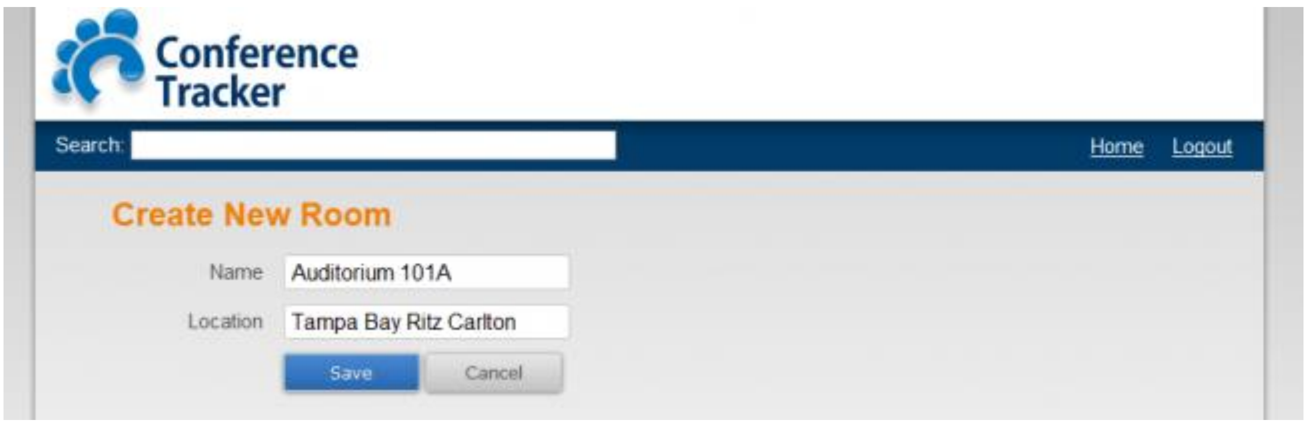
Edit Rooms

From the Conference Sessions screen if you click on the **Edit Rooms** button this screen is where you can see a list of all the rooms you have created. If you have not started creating rooms, this can be done by clicking on the **Create Room** button. The **View Schedule** button will take you back to the **Conference Sessions** screen.



Create Room

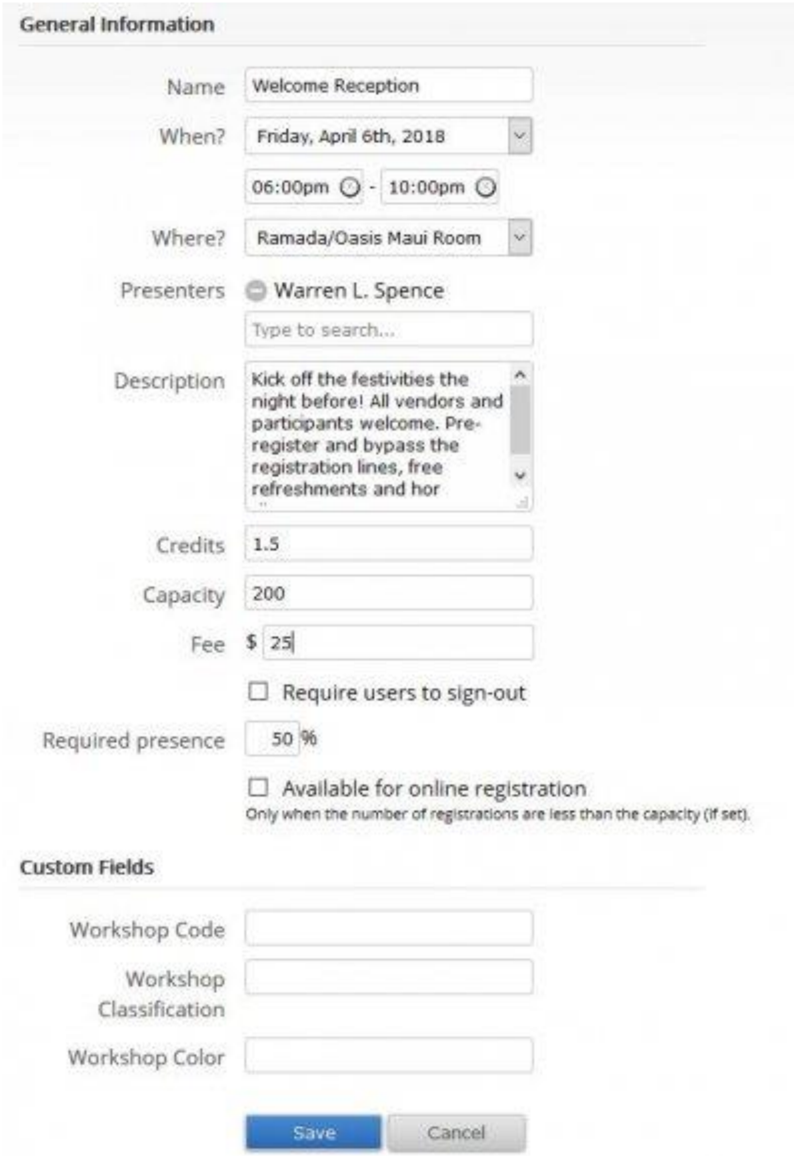
Clicking on the **Create Room** button on the **Edit Rooms** screen will take you to this page. To create a new room, simply fill in the **name** and **location** of the room.



Create Workshop/Session

Once you have the rooms entered in the **Conference Tracker** system, you are ready to either create your sessions/workshops manually or import them.

To manually enter a session/workshop you click on the **Create Session** button from the **Conference Sessions** screen. Once you get to the **Create Session** form, fill out the information. Once done, click **Save** to create.



General Information

Name - This is the name of the workshop that you want to appear on the Apple devices and in Conference reports.

When? - This is the date of this workshop. Select from the available dates in the drop-down menu and then select the Start time/End time of the workshop. ***Note:*** *To add additional dates visit the* ***Basic Info*** *section on the* ***Home*** *screen under the* ***Conference*** *heading.*

Where? - This is the **Room** that this workshop will take place. Select from the available **Rooms** in the drop-down menu. ***Note:*** *To add additional* ***Rooms*** *go back to the* ***View/Edit Schedule*** *section on the* ***Home*** *screen under the* ***Conference*** *heading.*

Speakers - This is an optional field to specify the person speaking at the **workshop/session**.

Description - Optionally give this **workshop/session** a description which **Attendees** will see when choosing them on the Online Registration form.

Credits - This item states how many credits the Attendee will earn if meeting the attendance requirements of this **workshop/session**.

Capacity - This is to let the system know how many Attendees can signup for the **workshop/session** before it becomes full on the Online Registration form.

Fee - This is the optional fee that can be added for signing up to attend this class from the Online Registration form.

Require Users to Sign-out - Check this off if you want the Attendees to have to swipe out at the end of the session.

Note: *Even if you do not require them to sign-out it will require you place a 1 in the* ***Required Presence*** *field.*

Required Presence - This is the percentage of time they must have been signed in for to obtain the credits for this **workshop/session**.

Available for online registration - Uncheck this box if you do not want Attendees to see this **workshop/session** on the Online Registration form.

Custom Fields

These are the custom fields are in setup in the Settings of the Conference Tracker account. If not using these fields simply ignore them. You can also import these on the Attendee import and display them on certificates and transcripts.

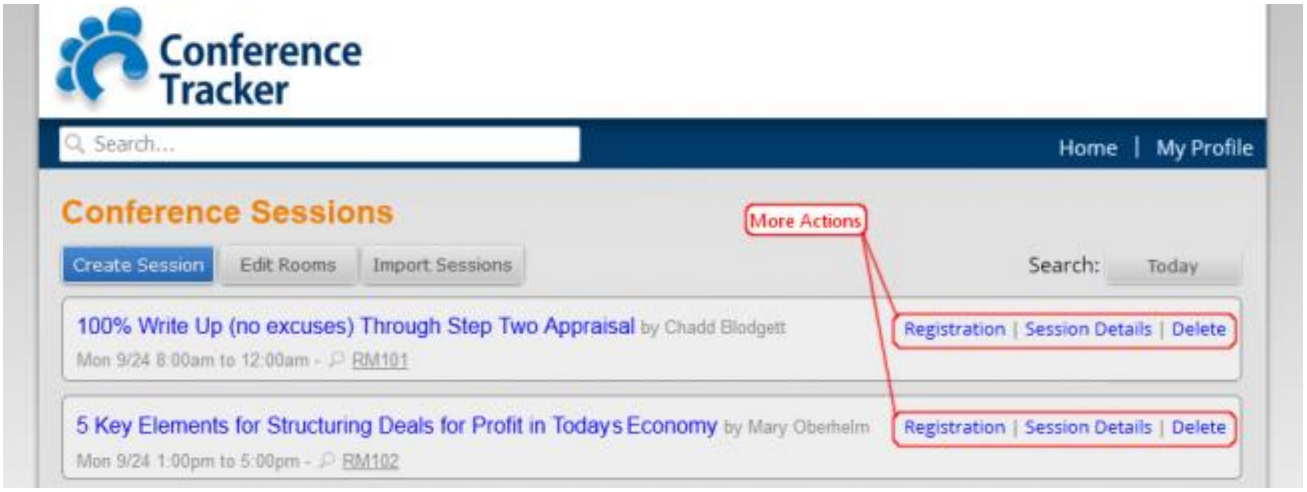
Edit Sessions

To edit a **Session/Workshop** simple click on it's title in the list of workshops when you are in the ***Conference > View Edit Sessions*** section.

Another option if there are too many **Sessions** to simply scroll through and click on the **Session Title** is to utilize the **Search:** feature at the top of any page in **Conference Tracker**.

More Actions

When looking at the list of **Sessions/Workshops** in **Conference Tracker** on the far right-side of each one listed there are 3 options.



Here is the explanation of each of those options:

- **Registration** - Use this option to see who of your **Attendees** are registered for this **Session/Workshop**.
- **Session Details** - Use this option to get an attendance report and statistics about the session.
- **Delete** - Use this option to remove the **Session** from the conference. You will then have to click a popup message to confirm this deletion.

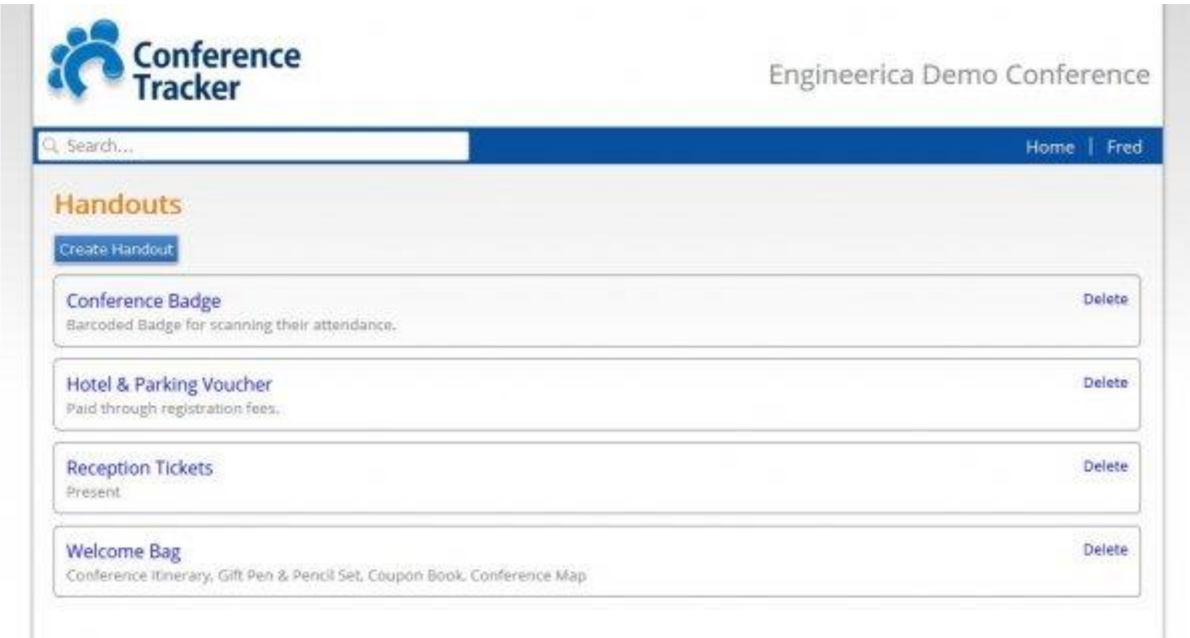
If you delete the **Workshop/Session** all settings will be deleted with it so this is not recommended unless you are canceling the **Session** or it was an extra **Session** created. You can still pull the **Attendance Logs** and **Attendance Logs (detailed) Exports** of those who have previously attended this session as these logs will remain in the system. However, if you try to recreate a **Session** with the exact same name as a Session that had been previously deleted, **Conference Tracker** will treat it is a new instance of this session, and the **Session Details Reports** will not show any previous data.

Import Sessions

If you already have an existing MS Excel Spreadsheet (XLS or XLSX) and would like to simply adjust the file to meet our import requirements. You can learn more about how the **Workshop/Session** import process works in our recently updated **Conference Tracker - Session/Workshops Import** section.

Check-in Handouts

In this section you create items that folks will complete or pickup during the **Check-In** process.



Create Handout

It's as simple as doing the following from this section:

1. Click the **Create Handout** button at the top of this page.
2. Now give a name to the **Handout** or **Activity** that they are collecting/doing at **Check-in**.
3. You can optionally give a description if needed.
4. Click the **Save** button at the bottom of the screen to save the **Handout**.

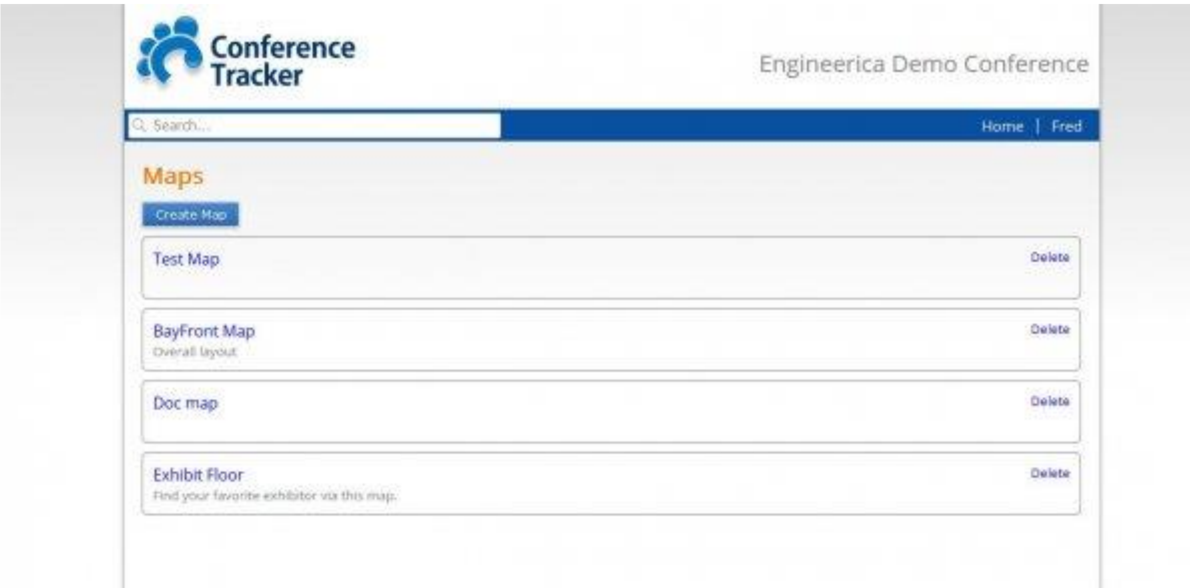
Delete Handout

When in this section you'll see a list of available **Handouts** that your conference will be giving out. If for some reason you are not going to be offering one of these items anymore or for whatever reason you want to get rid of all the tracking data for one of these items listed then click the **Delete** link on the far right-side of the listing you want to remove.

You should be careful deleting these items because once the **Handout** is deleted any information you may have wanted to **Export** or **Report** on is lost along with it. Make a careful decision before confirming the pop-up confirmation box that appears to delete this item.

Maps

In this section, you can upload either an image or document file to be used as a map for the attendees. These maps can only be accessed by attendees using the Attendee app.



Create a Map

To begin creating a new map, simply click on the **Create Map** button on the top left of this page. Then follow these steps:

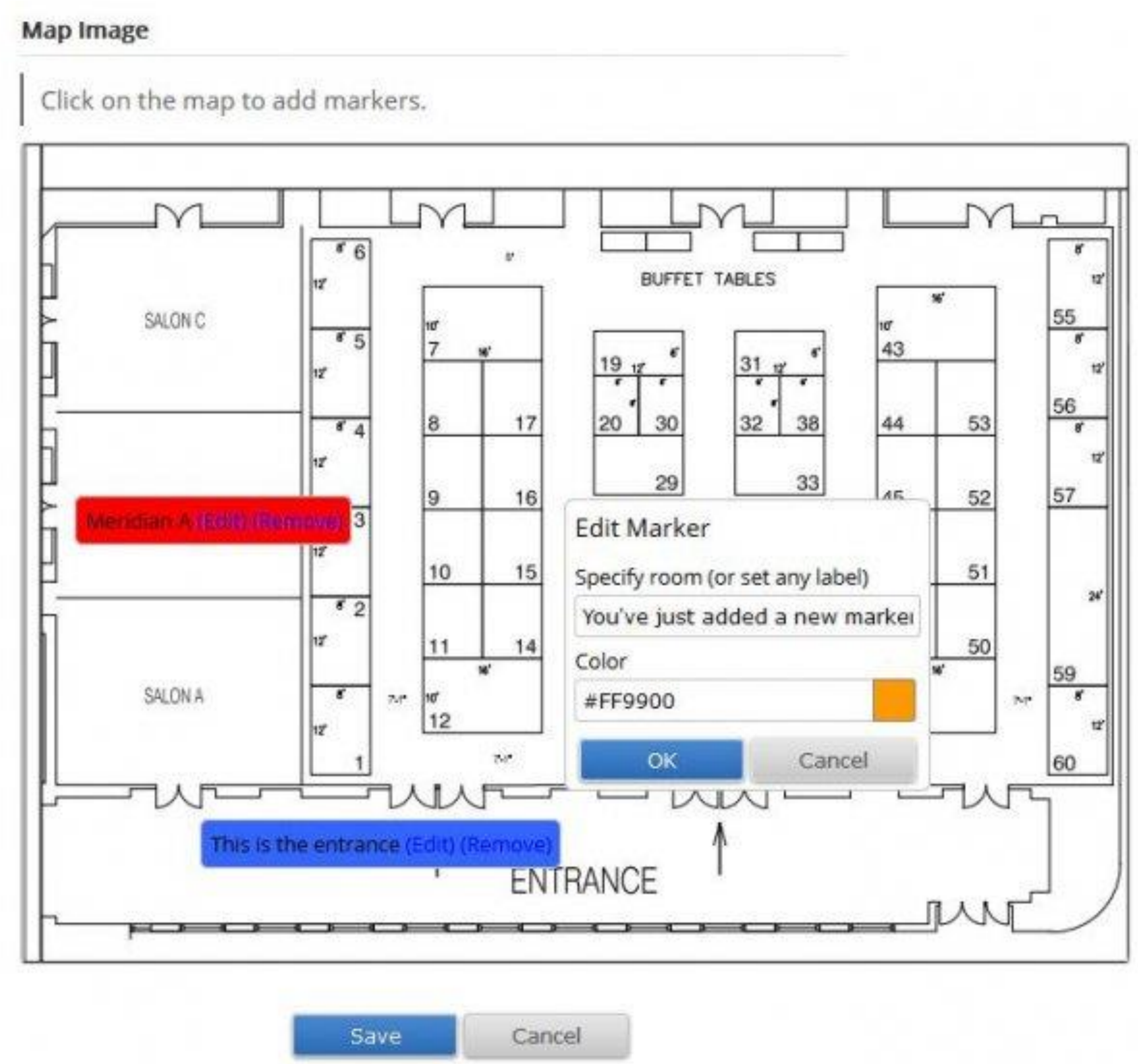
1. Enter a name for the map. This will be displayed on the Attendee app for your attendees to see.
2. Optionally, you can enter a description for the map.
3. Upload a file to be used as the map. You can upload standard image file types (such as .jpg or .png) and even PDFs.
4. Click the **Save** button on the bottom of the page once you're done to finish.

Delete a Map

To delete a map, return to the **Maps** page. From here, you should see your list of available maps. Simply click on the **Delete** button on the right side of the map you want removed to delete it.

Markers

You also have the ability to place markers on maps. Attendees are able to see markers you've placed on the map by accessing the map from the Attendee app. To begin creating a marker, click on one of your available maps from the **Maps** page.



From here, you should be able to see a preview image of the map. To create a marker, follow these steps:

1. Click anywhere on the image to begin creating a marker. A new marker will appear.
2. Click on **Edit** to change the properties of the marker.
3. You can change the name of the marker by changing the text under **Specify Room(or set any label)**.
4. You can change the color of the marker by entering your own hexadecimal code or by clicking on the white square to the right of the textbox to choose from a preset of available colors.
5. When you're done, click **Ok** to finish setting up your marker.

You can move your marker around the map by clicking and dragging it. You can also edit markers any time you would like by simply clicking on **Edit** on the specific marker you want to change.

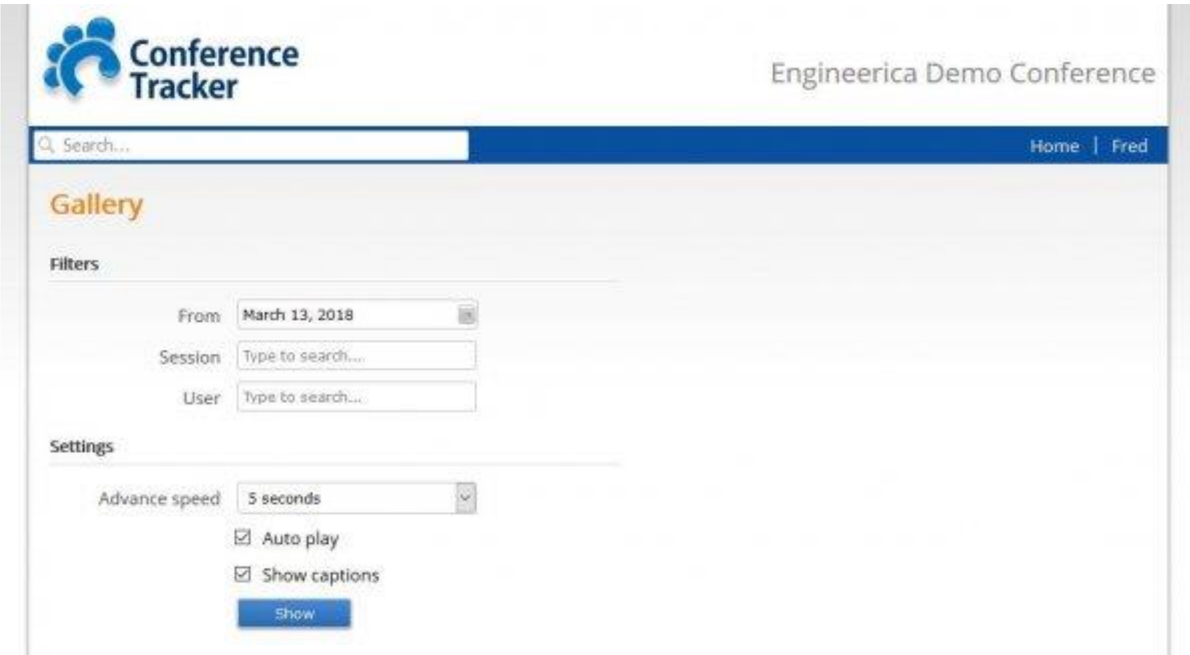
To remove a marker, click on **Remove** next to the **Edit** button on any marker.

Click on **Save** on the bottom of the page once you're done making changes to your map.

If you need to go back to the Conference Attendee Checklist, click here to go back.

Gallery

With this option, you'll be able to display a slideshow of the pictures that were uploaded to the **Attendee** app. The slideshow will display on your computer screen, but it is recommended that you project your screen on a wall or to a larger display at your event.



Filters

You have the choice of filtering the slideshow photos by **Date**, **Session**, and **User**. Adjusting the **Date** filter will only display photos after the date selected. Adjusting the **Session** filter will only display photos in the session selected. Adjusting the **User** filter will only display photos submitted by the selected user. You can use these filters individually or in combination with each other.

Settings

You can change the speed at which the pictures change using the **Advance Speed** drop down menu. You can select a range of times between 5 seconds to 1 minute.

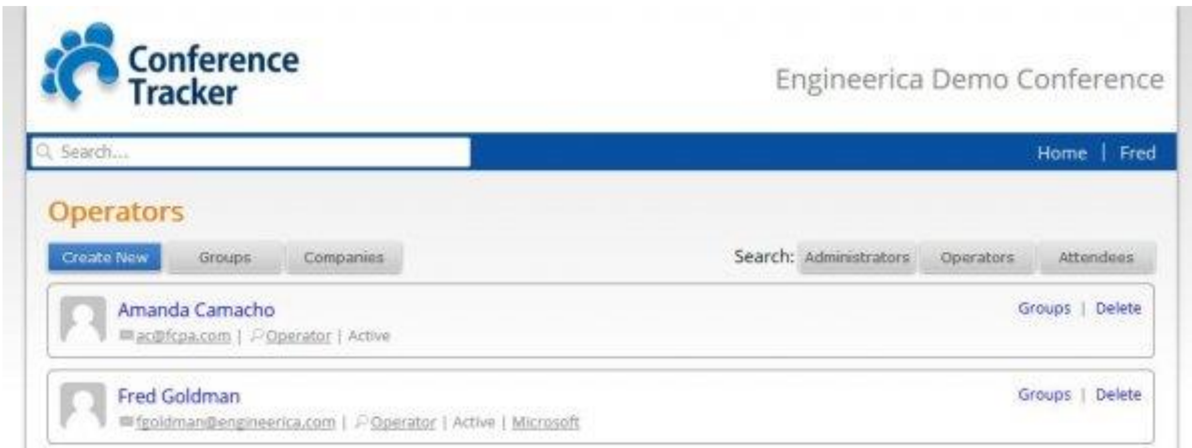
Enabling **Auto Play** will have the slideshow advance on its own. Leaving it unchecked will allow you to manually change the pictures yourself.

Enabling **Show Captions** will display in the bottom left corner of each picture the name, profile picture, and comment of the user who submitted the picture. Leaving it unchecked removes it.

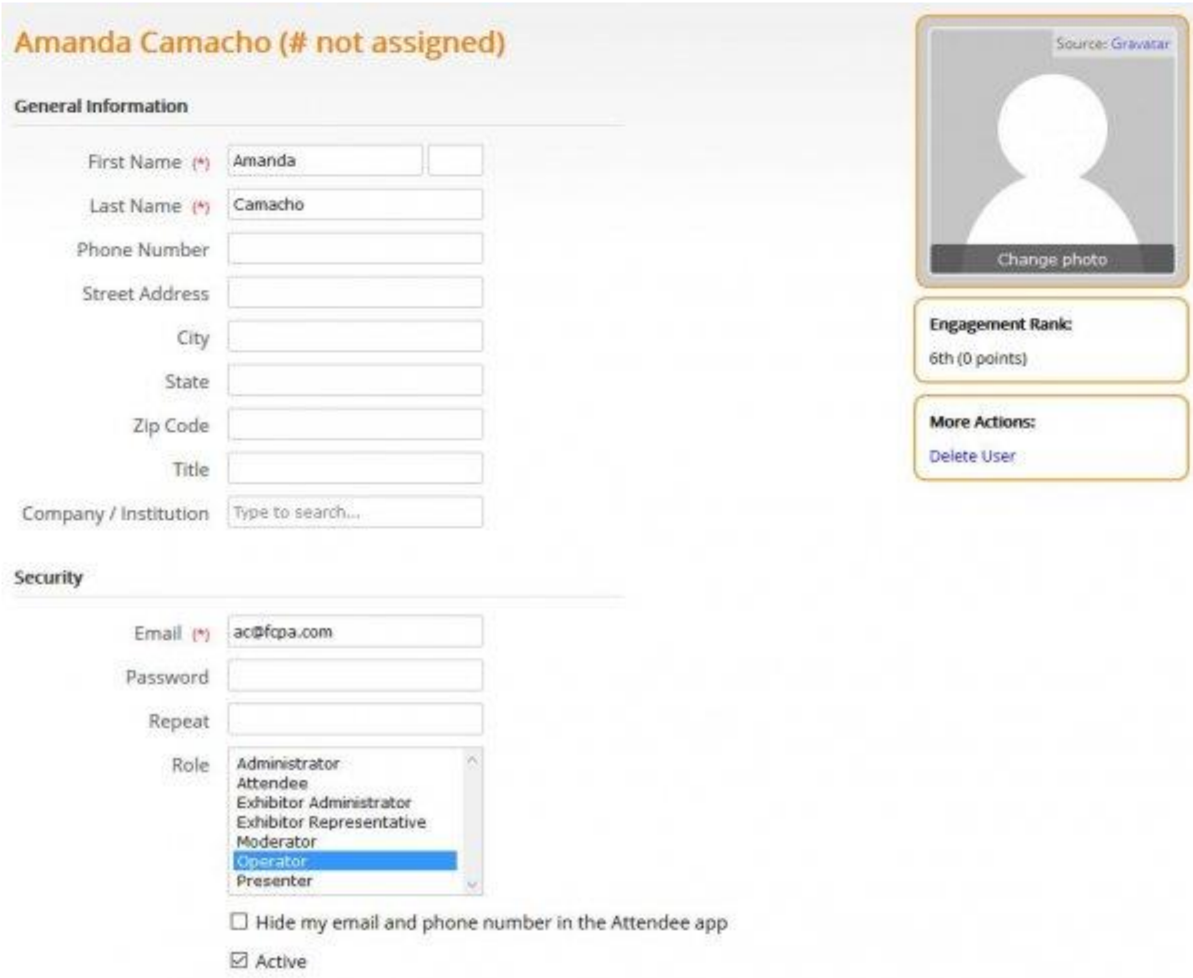
Device Operators

Click on **Device Operators** under **Conference** to access the operator section. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or regular **Attendees**.

Users with the **Operator** role have the ability to log into the **Conference Tracker** app to scan attendees.



You can click on the **Administrators**, **Operators**, **Exhibitors**, **Moderators**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.

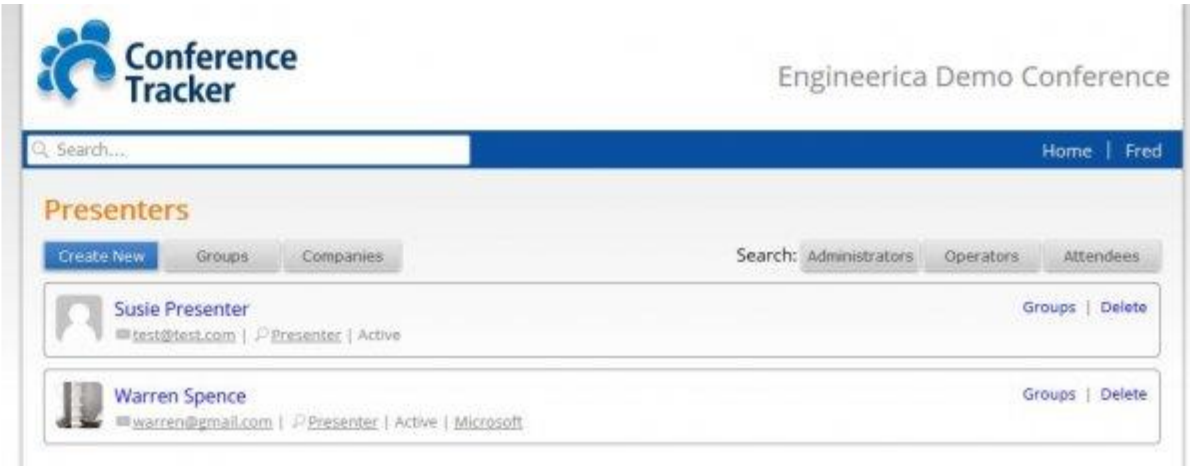


From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

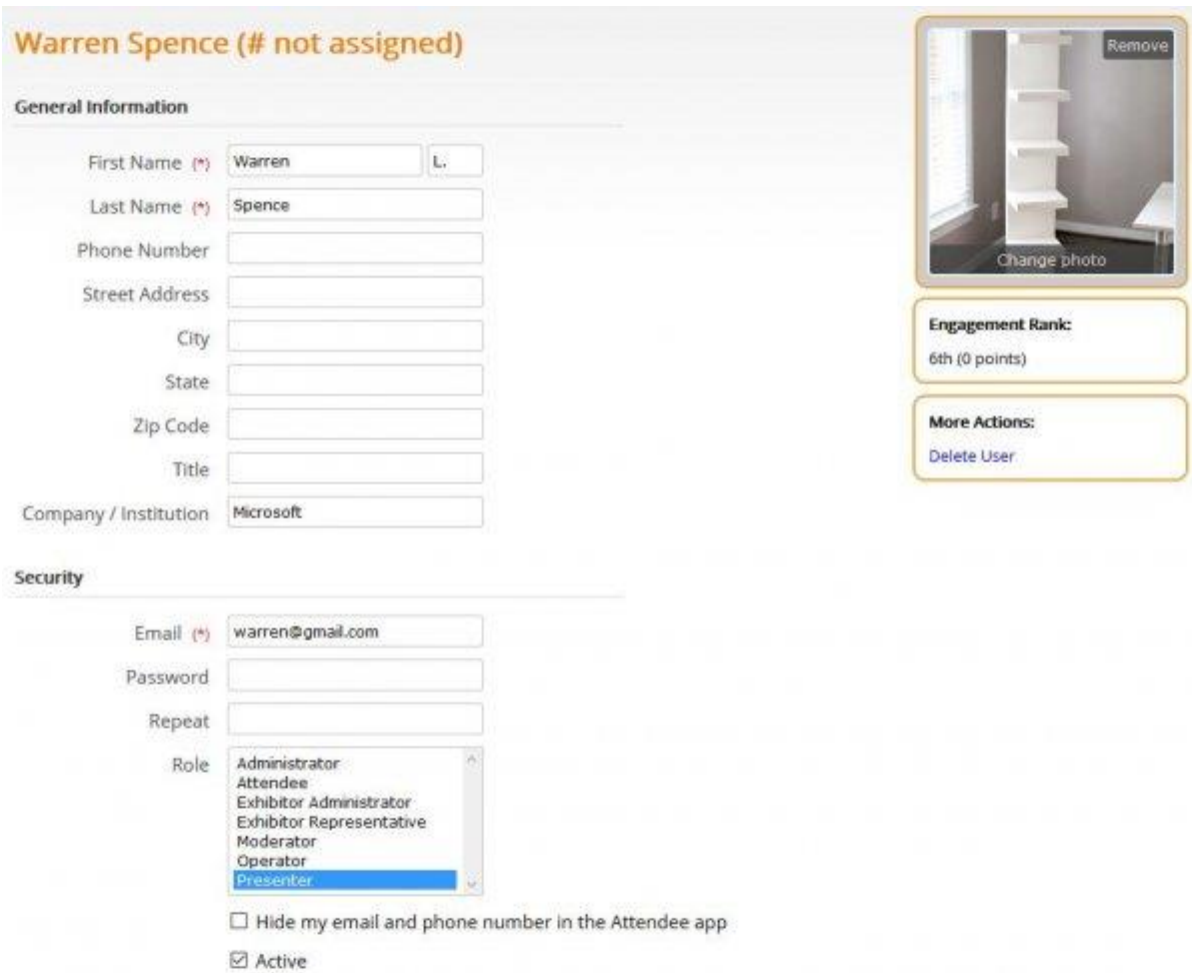
Presenters

Click on **Presenters** under **Conference** to access the Presenters section. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or regular **Attendees**.

Users with the **Presenter** role have no special ability other than being able to be assigned to a session, which will allow them to appear under the Presenter's list on the **Attendee** app.



You can click on the **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.



From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

Moderators

This is where you can manage your **Moderator** information.

Users with the **Moderator** role have the ability to moderate the posts on the **Attendee** app. They can delete posts made on the app, as well as upload and make changes to the Map.

Create: Simply click the **Create New** button at the top of this screen.

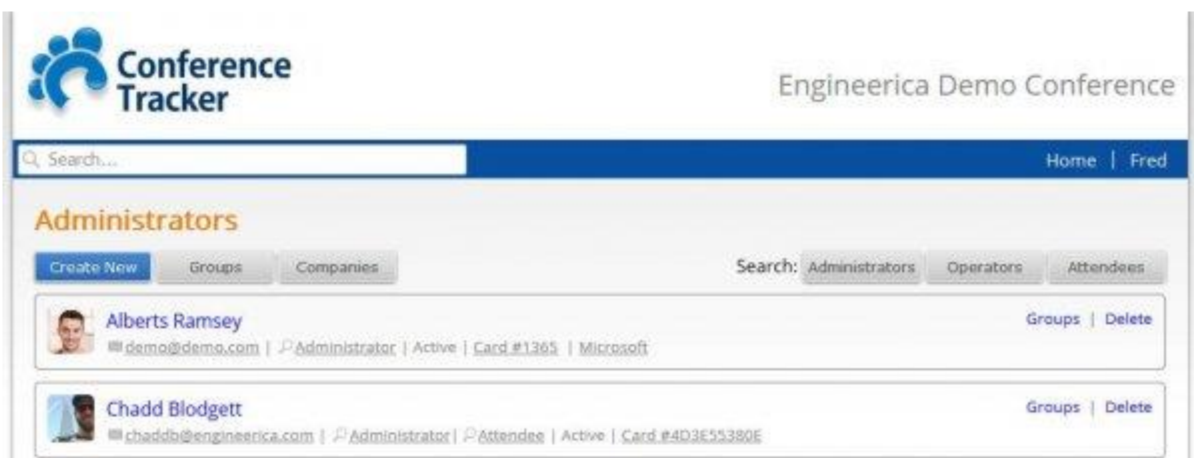
Edit: Click on the name of the Moderator you would like to edit.

Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

Administrators

This is where you can manage your **Administrators** information.

Users with the **Administrator** role have access to all features of **Conference Tracker**, **Conference Attendee**, and **Conference Leads**.



Create: Simply click the **Create New** button at the top of this screen.

Edit: Click on the name of the Administrator you would like to edit.

Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

If you accidentally clicked the **Delete** link click the **Cancel** button to go back.

Attendees

This is where you can **add**, **view**, and **edit**, **Attendees**. As well if you did not import the Card Numbers you can **assign cards** to them. Now with the **Attendee Online Registration** you can manage the **Attendee Online Registration Form** and view **Registration Analytics**. Manage **Attendee Check-ins** and **Handouts** that you want to monitor during the conference in this section as well.

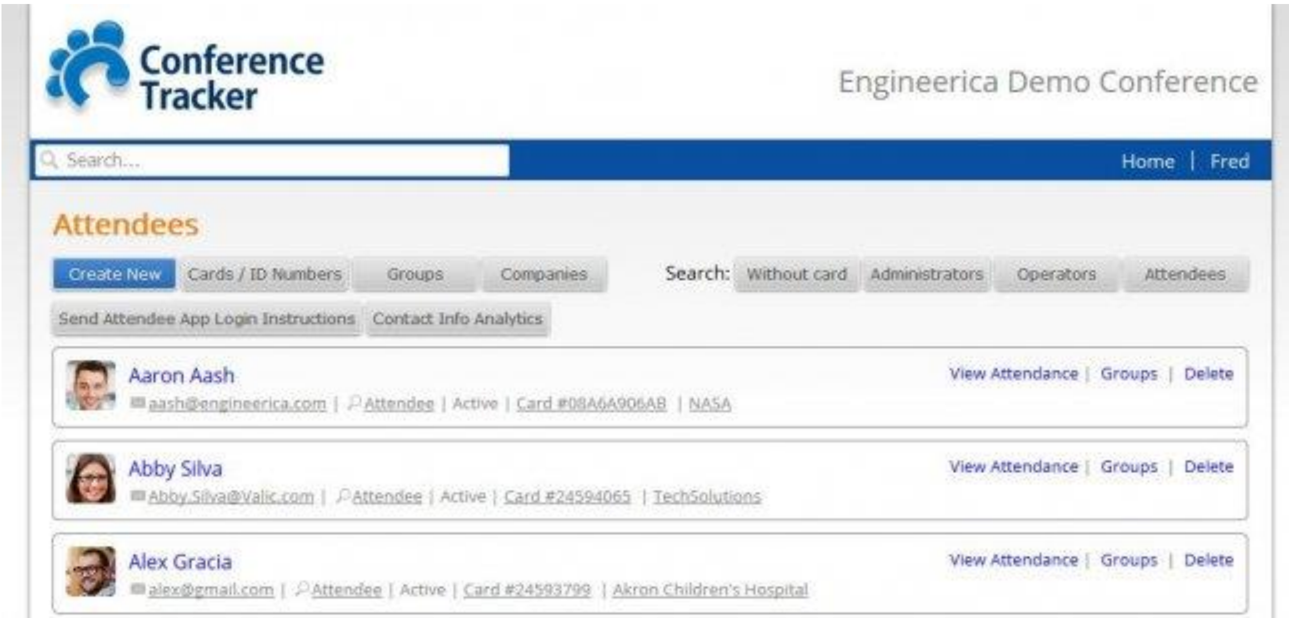
View/Edit Attendees

This is where you can **add**, **view**, and **edit** attendees. **Assign cards** to your **Attendees** here as well. You can view and manage their **Companies** and assign each **Company** a **Sponsorship** level.

Available Buttons

These **Buttons** are located in the top-left corner of the screen:

- **Create New** - This allows you to create a new **Attendee**.
- **Cards/ID Numbers** - This option allows you to manage the **Attendees' Card Numbers**.
- **Groups** - This allows you to manage your **Groups**.
- **Companies** - This section is where you manage **Attendee Companies**
- **Send Attendee App Login Instructions** - This option will send an email to all attendees with instructions to log in and download the Attendee App. **ONLY AVAILABLE IF ATTENDEE APP IS ACTIVE FOR ACCOUNT**
- **Contact Info Analytics** - This option will show you how complete the contact information for the attendees is.



View Filters

These **Search Filters** that are located in the top-right corner of the screen allow you to see only certain **Attendees** by role:

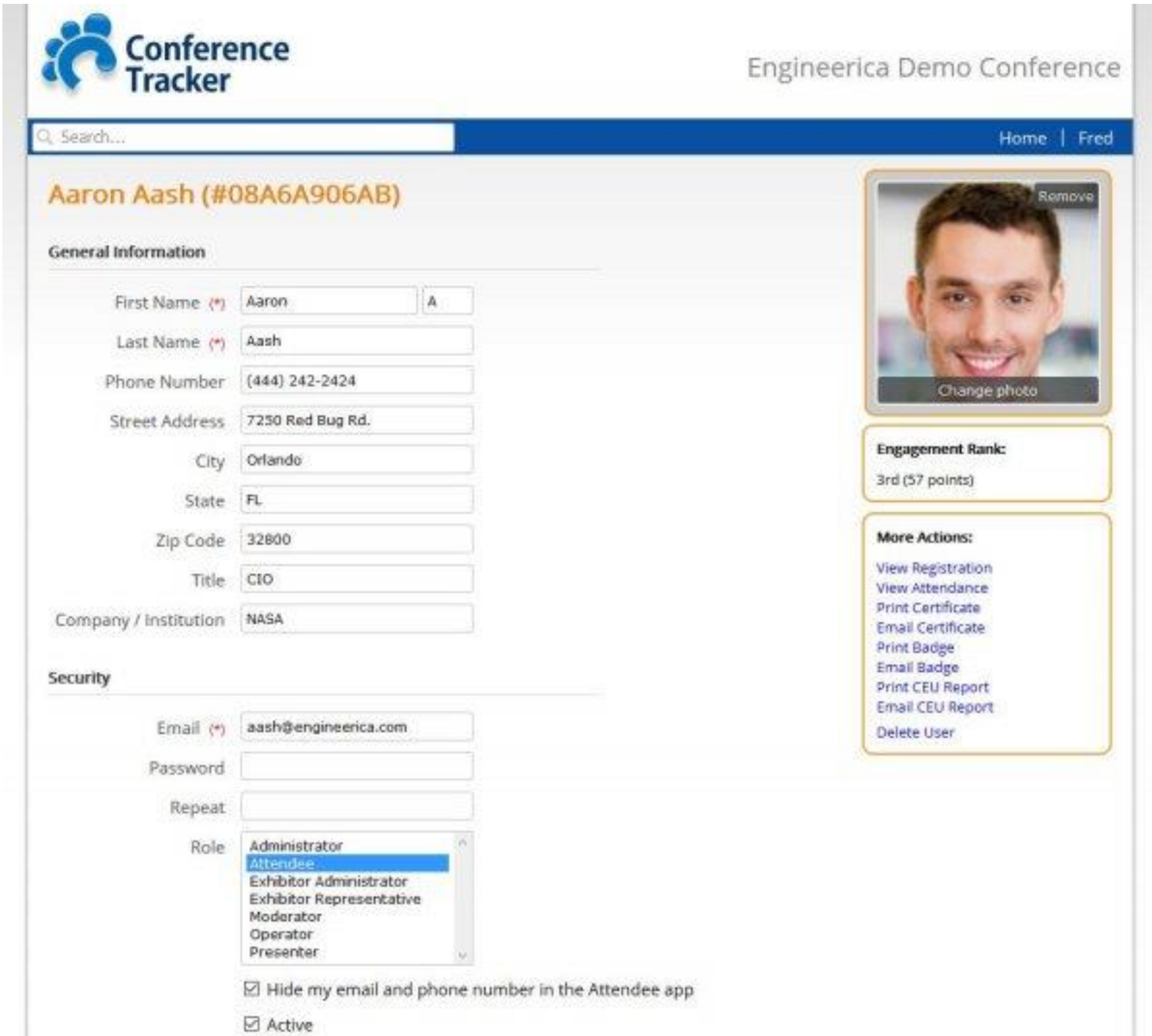
- **Administrators**
- **Operators**
- **Attendees**

Or if they have no **Card Number** assigned:

- **Without Card**

Create New Attendee

You can manually create new **Attendees** in case there's a **Walk-in Registration**, you simply need to add them, and/or if they were not included on your imported list. To create a new **Attendee** start by clicking the **Create New** button on the **Attendees** screen (**Attendees > View/Edit**).



Once you have entered all the required information and any other you want press the **Save** button to create the **Attendee**.

Attendees can be imported if you have a list of them with the minimum required information such as **First Name**, **Last Name**, and **Email Address**. A column for **Middle name** needs to be added although is not required to include any info. The **Card Number** can be added as well if you want to assign your own numbers.

Import Attendees

Here's the place where you can import your attendees, your workshops, and everything to quickly get started. To make it as simple as possible we have defined a bunch of formats to follow. By creating a file as explained below, you can directly upload the file and **Conference Tracker** will recognize it as valid one, knowing completely what to do.

File Format

By now, only **comma-separated-values (CSV)** files are supported. This format is broadly supported by many applications including Microsoft Excel; it also can be created using any simple text editor. In the first line of the file the headers must be included (check the list of valid headers below), then, the data must be included separating each column by a comma. In the case you need to write a comma in the data itself, you can prevent format errors by enclosing the full value in double quotes.

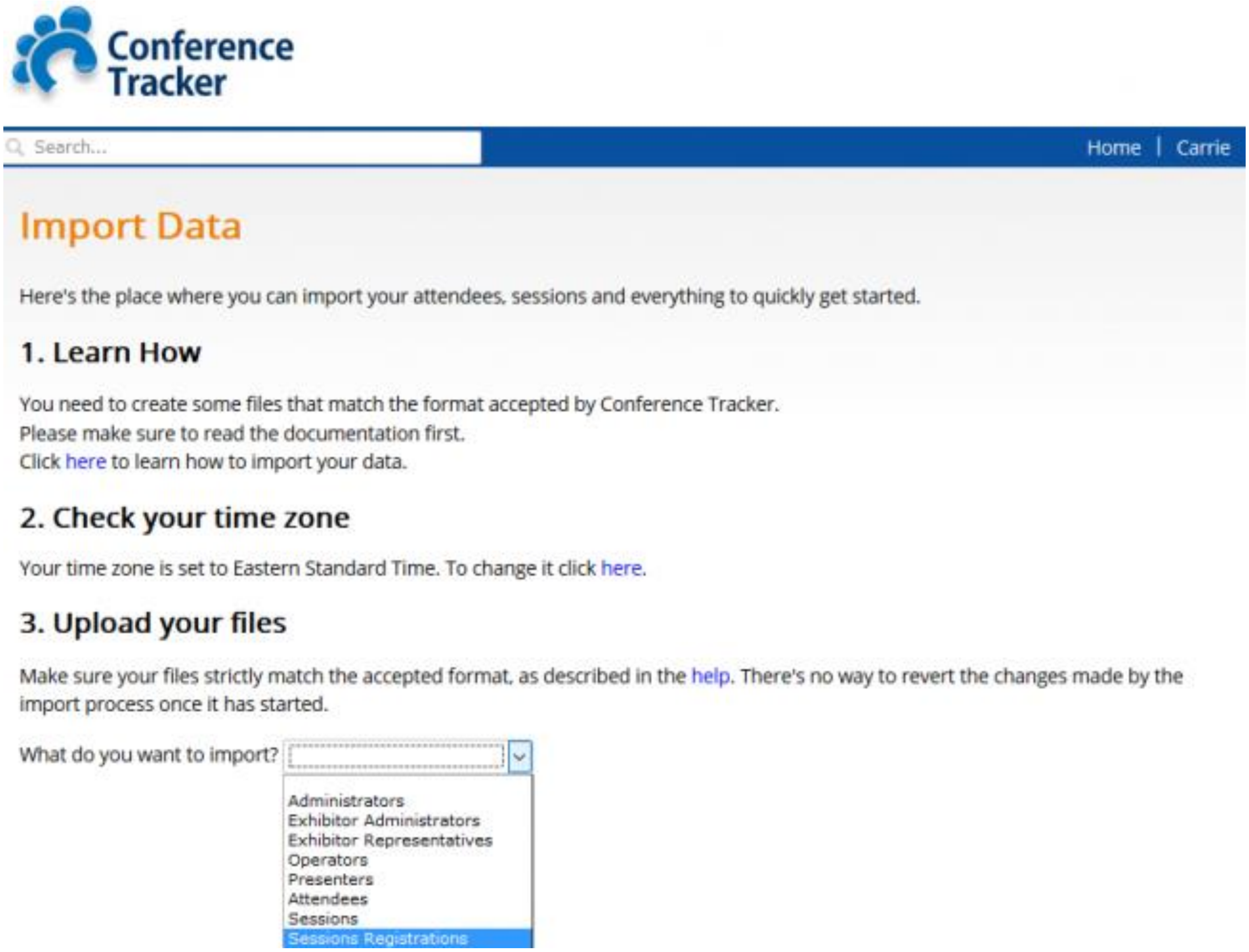
Valid Headers

To import **attendees**, you need to specify the following headers: **First Name**, **Middle Name**, **Last Name**, **E-mail**, **Card Number** (This will be the number on the ID Badge Barcode)

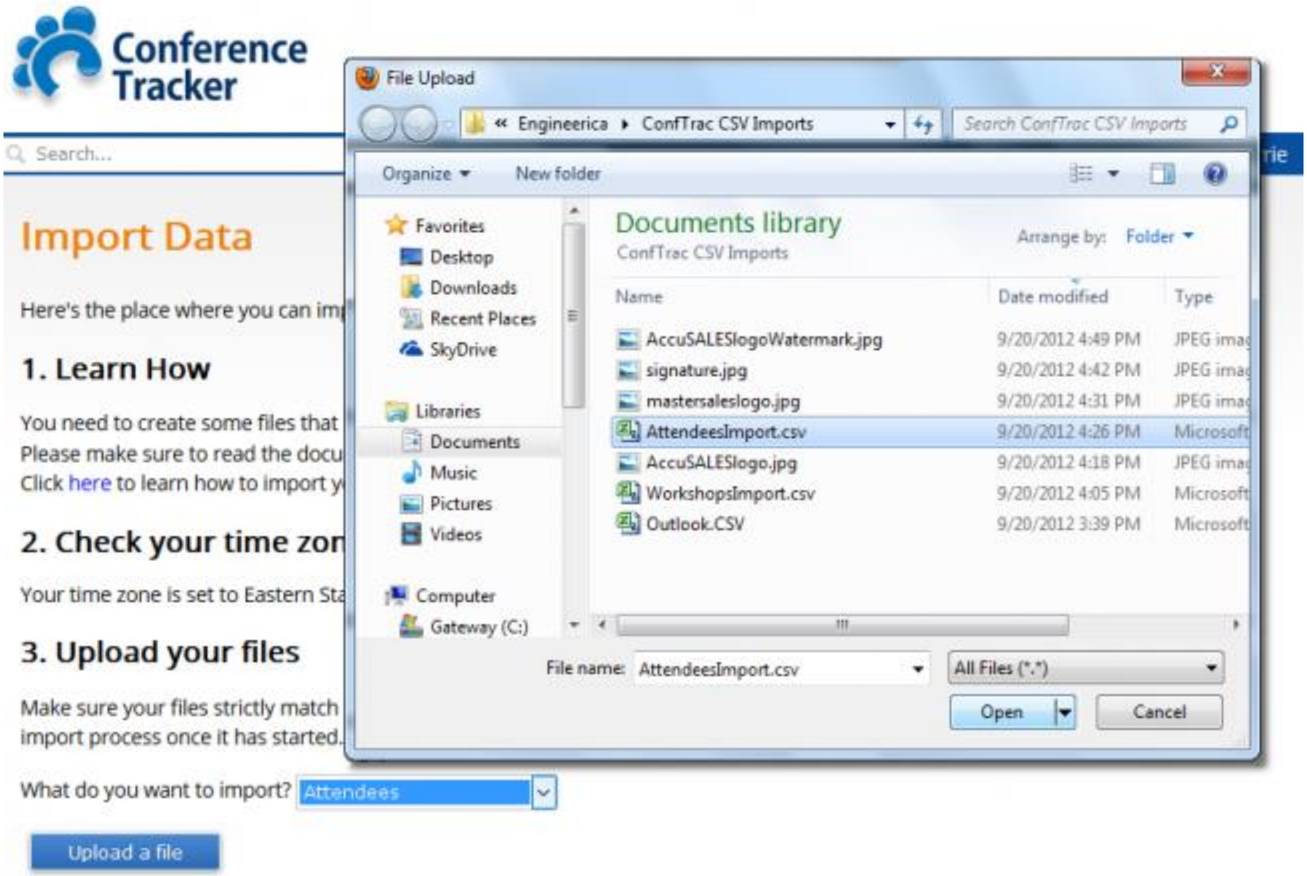
Attendees Import

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

Once you've got the CSV files prepared and ready, let's move on to uploading your files. To get here just click on the **Import Sessions** button from the **Conference Sessions** screen.



To import the CSV files you created you just have to click the **upload a file** button.



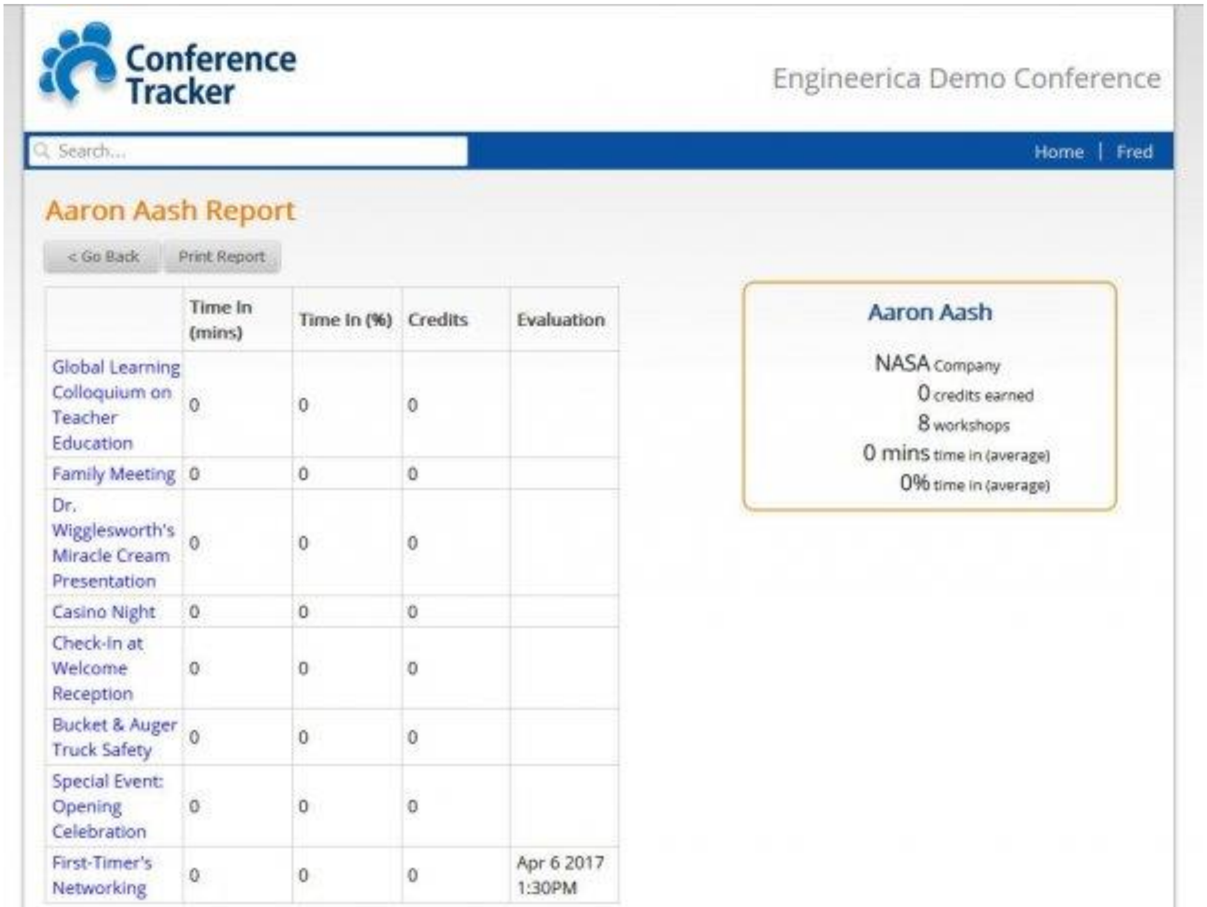
Browse your PC to find the CSV files and click open to upload and done! A confirmation will be at the bottom of the screen.

More Actions

- **View Attendance** - This option allows you to pull a quick **Report** on the **Sessions** attended by this **Attendee**.
- **Delete** - This option allows you to remove an Attendee from Conference Tracker if added in error.

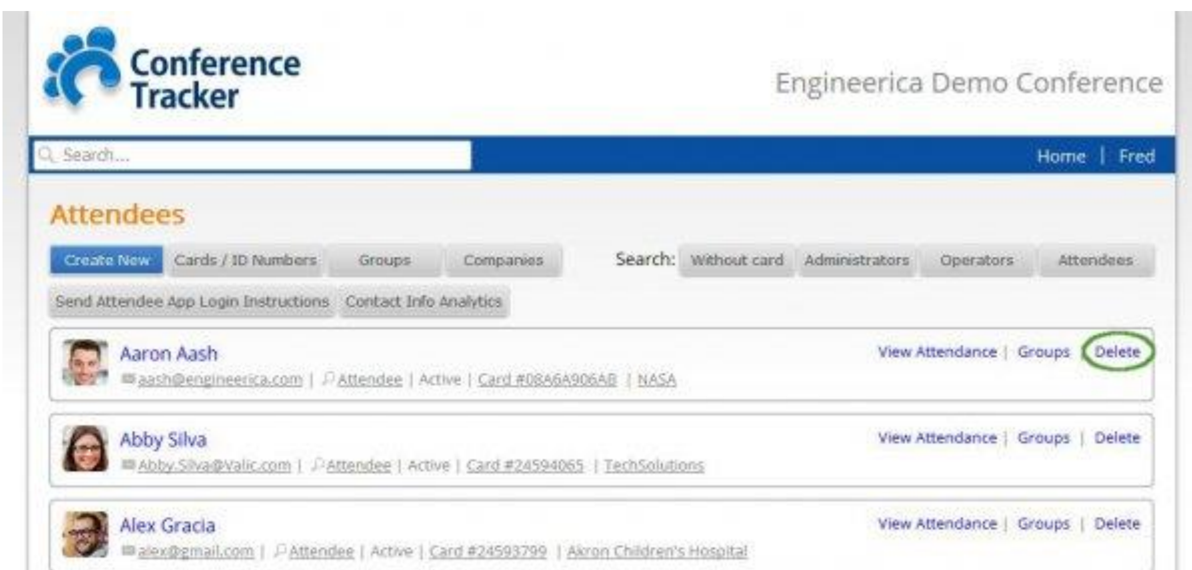
View Attendance

To view the **Attendee's Workshop/Session Attendance** click the **View Attendance** link on the far-right of their listing in the list of the **Attendees** in the **Attendees** screen. You'll get a report like shown below that you can simply view or print.



Delete Attendees

To delete an **Attendee** just click on the **delete** link on the far-right of their listing in the list of **Attendees** in the **Attendees** screen.



All **Attendance Logs** Associated with this attendee will become orphaned from this user even if they are re-added later. The **Exports** and **Attendance Logs** may still reflect this information but if you recreate them later after being deleted they will not show in the **Attendance Details** section with the previously associated logs.

Groups

This page will allow you to manage your groups. Groups allows you to filter attendees into different batches. After creating a group, you can then print or email badges, QR labels, certificates, and CEU reports based on group.

Create a Group

You can create new groups manually or by importing them. To begin manually creating a new group, click on the **Create New** button. From there, simply enter in a group name (optionally, you can also enter a description) and click **Save** to finish creating your group.

To delete a group, click on the **Delete** button to the right of the group you want removed.

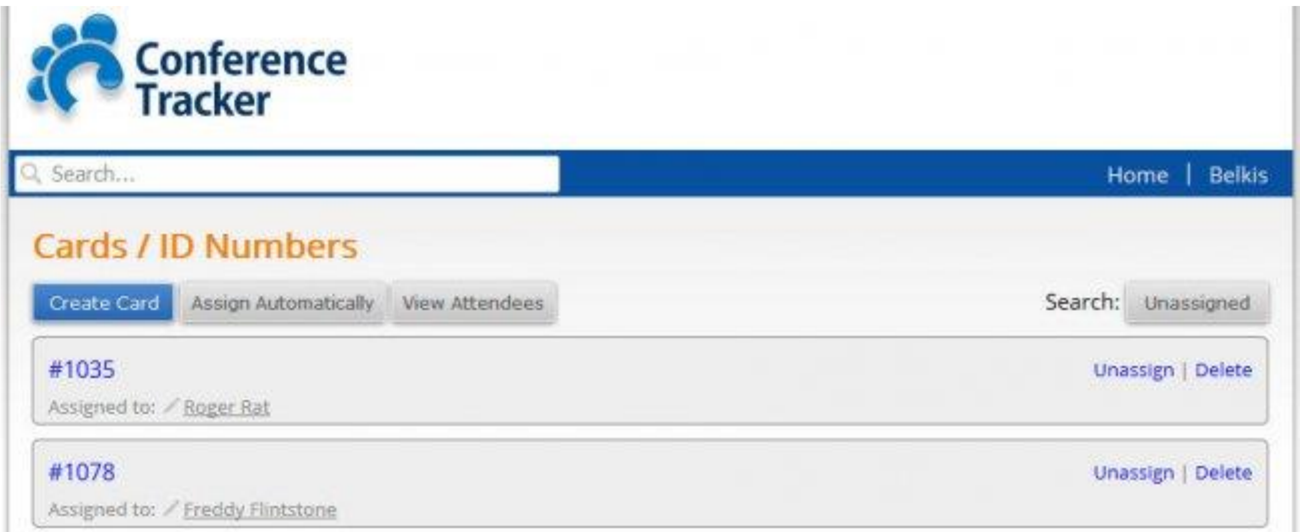
Assigning Members

To begin adding members to your group, click on the **Members** option to the right of the group you want to add members to. From there, you can begin searching attendees using the search bar. Once you've found the attendee you want to add to the group, click their name from the drop down menu and then the **Add User** button. They will be added to the group list.

To remove members, click on the **minus symbol** to the left of the name you want removed.

Cards / ID Numbers

To access this section from the home screen click **Attendees > View/Edit > Cards / ID Numbers** button. The purpose of card numbers is to create a QR code on the Attendees' badge.



Assigning cards is only necessary if you created the attendee manually and you did not choose to assign the card number at the time. By importing attendees you can skip this step if the import includes the card number. Additionally, if you forgot to import the attendees with a card number you can easily assign everyone a card with a click of a button. Learn more in the next section.

Create Card

To assign the card number start by clicking the **Create Card** button and typing the card number and then select the name of the attendee you would like to assign that will appear under **Assigned To** as a drop down menu.

Assign Automatically

The **Assign Automatically** button will auto-generate card numbers and assign it to the attendees that don't have one. Once you click the button, the process is done in the background and depending on the size of the database it may take several minutes.

More Actions

These are additional options you can do from the **Cards/ID numbers** screen.

View Attendees

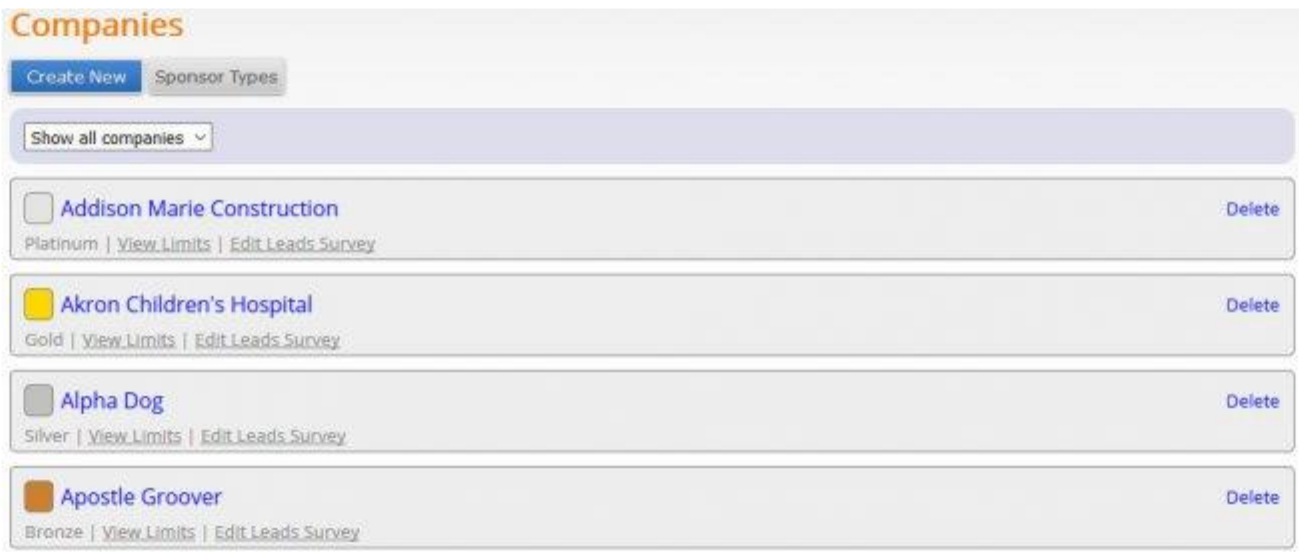
If you would like to go back to the list of **Attendees** then click the **View Attendees** button.

Unassigned

To see all the **Attendees** without card numbers use the **Unassigned** button in the top-right corner.

Companies

This is a list of all **Attendees'**, **Exhibitors'**, **Presenters'**, **Operators'** and **Administrators' Companies**.



This is primarily used for **Exhibitors' Companies** so you can view/manage their Sponsorship Level, help them create their **Conference Leads** Survey/Questionnaire, and view their **Conference Leads** limits (The amount of Exhibitors for each **Company** that are licensed to use the **Conference Leads** app).

Create New Company

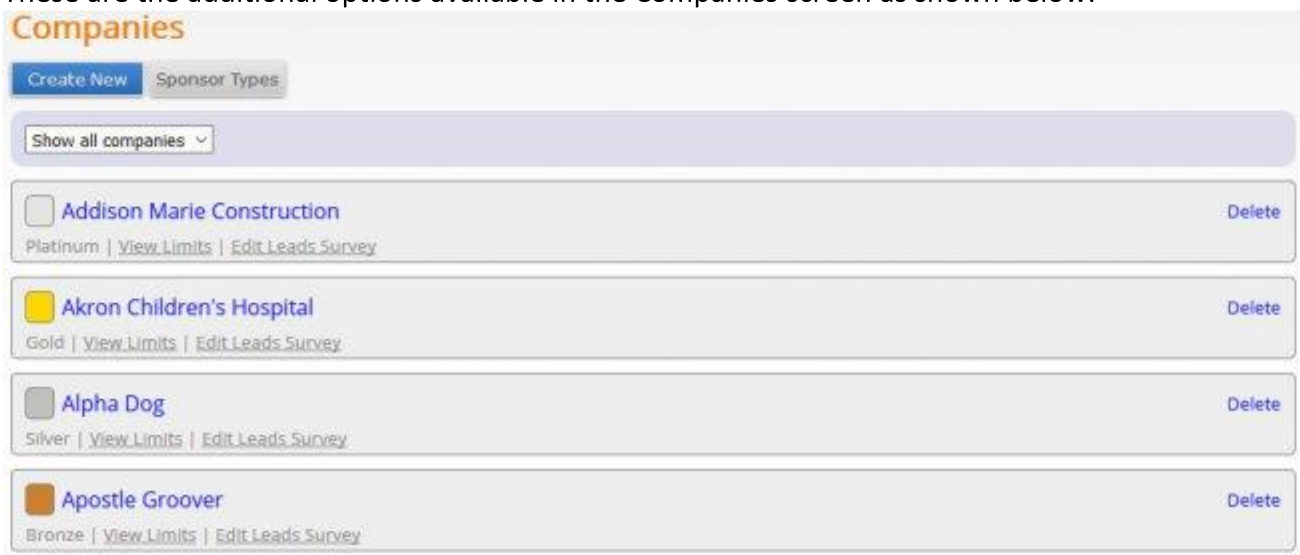
Typically the **Company** will never need to be created manually if you are importing your **Users** (Exhibitors and Attendees) or having each sign-up/register online through **Conference Tracker's** Online Registration. If you have to create a Company simply:

1. Click the Create New button.
2. Fill-out the required fields (Company Name).

3. Finally click the **Save** button when complete.

More Actions

These are the additional options available in the Companies screen as shown below:



Edit a Company

To edit a **Company** you simply need to click on any of the **Company** names in the list.

View Limits

To view the **Conference Leads License Limits** of a company simply click the **View Limits** link below the **Company** name on any one of the **Companies** listed in this screen. This will be based on how many **Conference Leads Licenses** the **Exhibitor's Company** purchased.

View Representatives

Clicking this option will take you to a list of all of the selected company's representatives attending the conference.

Edit Leads Survey

The **Conference Leads Survey** is a unique set of questions per **Company** that they ask **Attendees** who stop by their booth using the Conference Leads app. To view/edit the **Conference Leads Survey** for a **Company** you can click the **Edit Leads Survey** link on the **Company** listed in this screen.

Delete a Company

To delete the **Company** simply click the **Delete** link on the far right-side of any one of the **Companies** listed in this screen. You'll be prompted to confirm to prevent accidental deletions.

Sponsor Types

These **Sponsor Types** or **Sponsorship Levels** were created to allow you to assign each **Company** a **Sponsorship level** in **Conference Tracker**.

Create New Sponsor Type

1. Click the **Create New** button.
2. Fill-out the required fields (Sponsor Type Name).
3. Finally click the **Save** button when complete.

Edit a Sponsor Type

Simply click the **Name/Title** of the **Sponsor Type** in the list of **Sponsor Types** to change it's attributes.

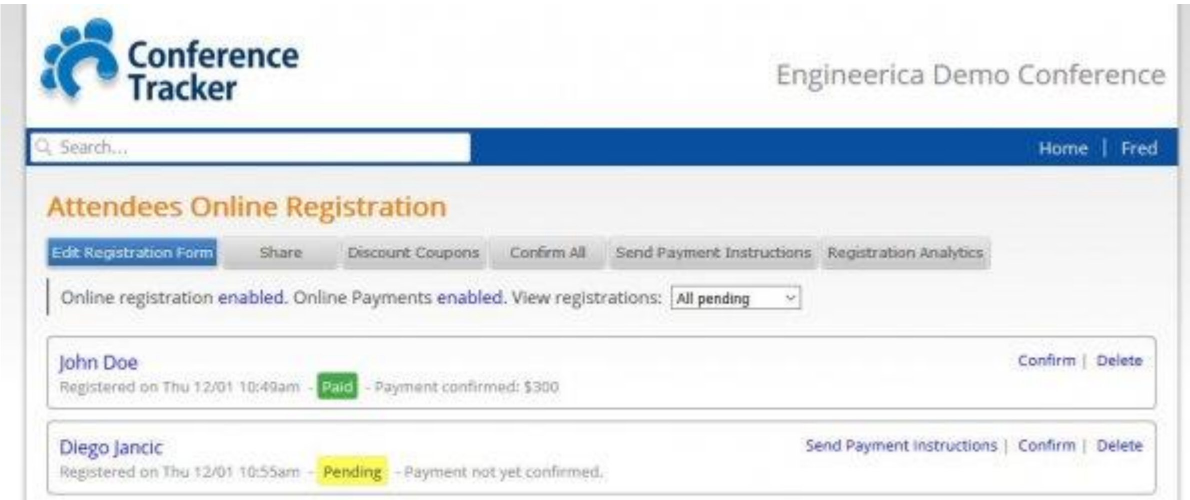
Delete a Sponsor Type

To delete one of these **Sponsor Types** if added in error you can click the **Delete** link on the far right-side of every listed **Sponsor Type**. Confirm the message and done!

Online Registration

How to access: **Attendees** > **Online Registration**

This is where you can create the registration form for the attendees to fill-out and also approve the attendees once they start completing the online registration form. Here is an example of a registered attendee who completed the online form:



In order to use this feature you must first go to the **Basic Info** under the **Conference** section and check the box for ***Enable Registration*** and save.

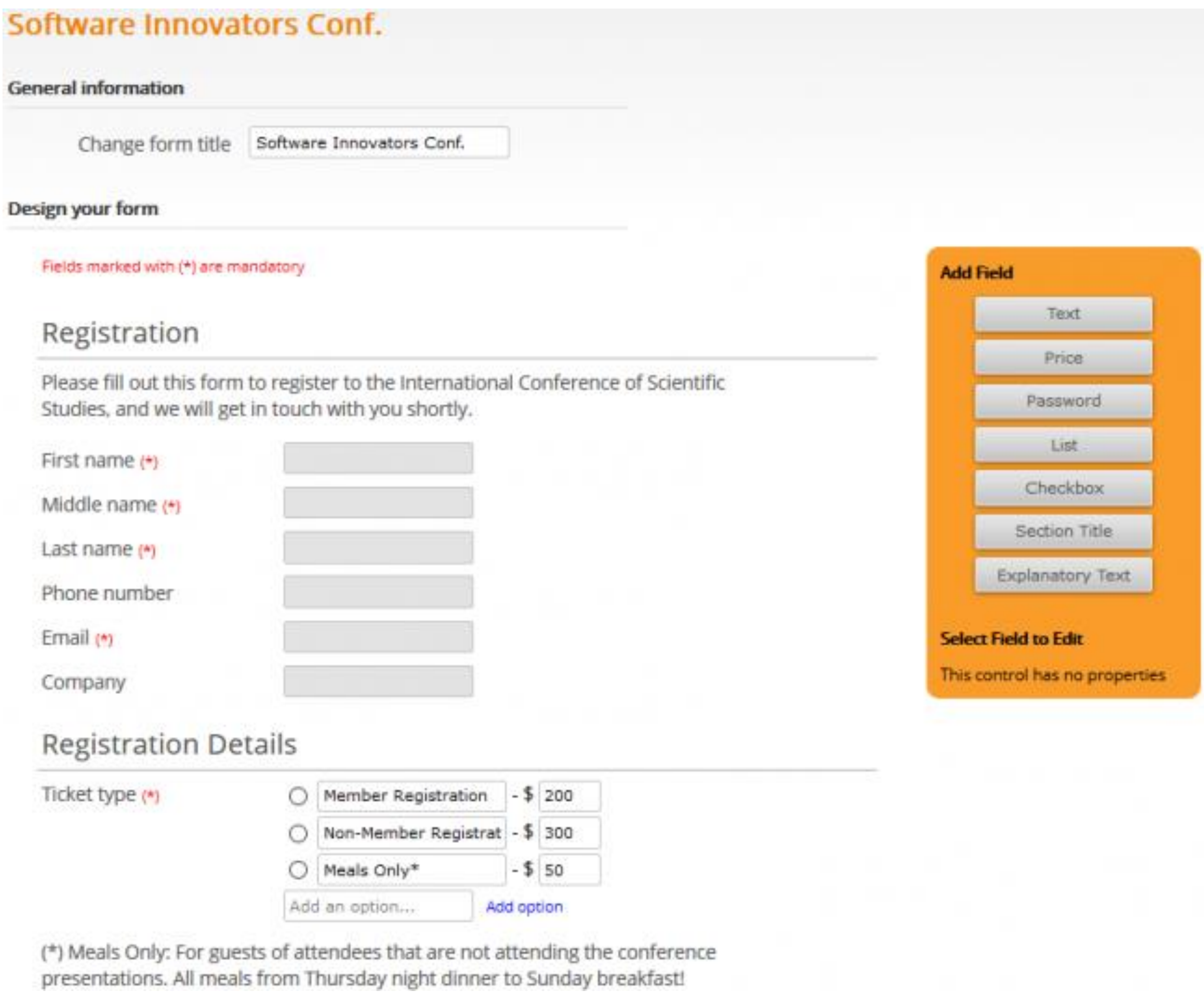
Create/Edit Registration Form

If you have already enabled Online Registration you can now edit your registration form by clicking the **Edit Registration Form** button. Here you can add your own custom fields in addition to the default fields in the system. There are 7 types of fields:

1. **Textbox** - The purpose of this item is simply if you want to get a text response from the registrant.
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).
2. **Price** - The purpose of this item is to allow your registrant to add any price value to their final payment (Typically used for donations).
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).
3. **Password** - This item is basically a text box that hides the characters and could be used to hide sensitive information. Note: You'll get 2 fields so the user will have to verify the information.
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).
        - **Minimum length** - Use this option to set the minimum length required for the password.
4. **Listbox** - The purpose of this item is to allow the registrant to select one or multiple item(s) from a list of options. Note: You can now add prices to these options to be tallied on final payment.
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).

        - **Multiple selection** - Use this option if you want the registrant to have more than one selection.
        - **Allow Prices per Option** - Use this option if you want to associate prices with each list item that will be added to their final payment.
5. **Checkbox** - The purpose of this item is to allow the registrant to check a box on the registration form (typically used to confirm consent).
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).
6. **Section Title** - The purpose of this item is to separate portions of the form with headings.
7. **Explanatory Text** - The purpose of this item is to provide additional information to registrants while they are completing the form.

To **add** them simply click the button on the far right to add each of the field types. To **edit** the text simply click the text to the left of the field. To **delete** a field click the red ball to the right of the field as shown below. Be sure to save after your are done with the **Save** button at the bottom of the form.



You can now mark sessions for online registration. Marked sessions will appear on the Conference Tracker online conference registration form. Attendees will see a description of these sessions and will be able to sign up for them. The software will keep track of the registrations and will allow attendees to register until the room reaches its full capacity!

Registration Options

The other options aside from editing the registration form you have here allow you quickly confirm all registrations using the **Confirm All** button and the Share Option.

Confirm All

Confirm All could possibly be used if you want to quickly add every received registration form regardless of it's phase. This will make more sense after reading **The Registration Process** section below.

Share

This area allows you to get iframe html code to add the registration form to your own website, offers quick Social Media options to share information about registering for the conference, and finally a direct link that you can e-mail to possible attendees so they can register for the conference.

Send Payment Instructions

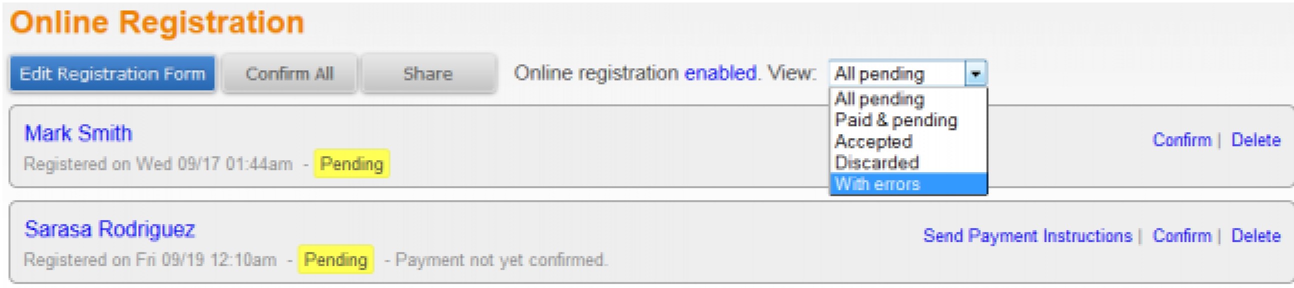
Use this button to send all the pending attendees the payment URL/information to complete the process through PayPal. This is only necessary if you are using PayPal through **Conference Tracker** and online payments are activated.

The Registration Process

This area can get confusing for first time users so this next section is here to help clarify the process of Attendees registering for the conference.

The next topic to discuss is the life-cycle of a registration goes through several phases in this order:

1. **Pending** or **With Error**
2. **Paid & Pending** (Can be skipped if you set to auto-accept paid registrations.)
3. **Accepted** or **Discarded**.



Pending

This means that the **Attendee** has filled out the registration form but it has not been approved. This phase is when the attendee has not paid for the Conference. From here you can select the option on the Attendee's line to “Send Payment Instructions” as pictured above.

With Error

These are the registration forms that have been completed with errors. Several examples may be the e-mail address was formatted incorrectly like “mi ke@abc.com” or the phone number is missing a digit like “407-555-555_”. Here you'll have the ability to make these corrections.

Paid & Pending

Attendees will only show up in this phase if “Auto-accept when payment received” is not turned on in the conference settings. Here you can manually accept the Attendees who've paid their registration fees.

Accepted or Discarded

These are lists of all the Accepted Registrations and Discarded ones you chose to delete.

Accepted

This is a list of all the Accepted Registrations.

Discarded

This is a list of all the Registrations Discarded you chose to delete.

You can look at each of these using the dropdown box labeled *View* in the top right of the Online Registration screen (pictured in the screenshot above).

Registration Analytics

Run this handy tool to know things like most popular session/workshops based on sign-ups, responses to meal plans or other custom questions, and number of attendees per session. Use this for better planning for your conference.

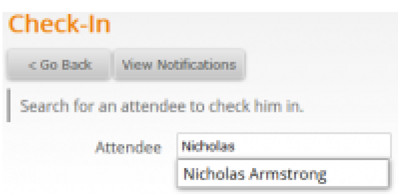
Check-In

In this section this is where you Check-in **Attendees** for the conference and give them **handouts** you previously created in the conference details section. Each time you check-in a person you can provide additional comments about the **Attendee**.

Closed Check-in

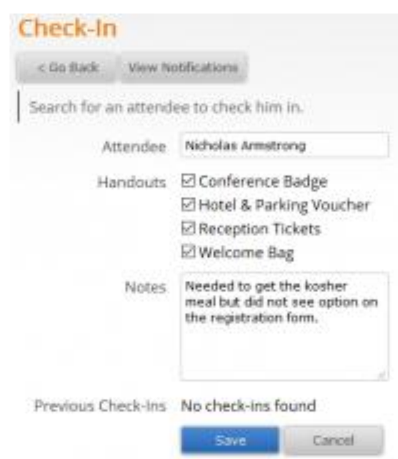
This simply means that today is not one of the dates of the Conference as **Check-ins** can only be done during the Conference dates. This means if you plan on doing **Check-Ins** the night before be sure to include that date in the **Basic Info** section of your **Conference Tracker** account.

Open Check-in



This would display on the dates of the conference and allow you to **Check-in Attendees** to pickup their **Handouts** and provide any last minute notes. To do this, follow the process below:

1. Type the name of the attendee and if registered they should show up in the list. And now select their name in the list.
2. Once selected check of the items they are picking up from your area and provide any notes regarding the person and or comments. This could be as simple as "Had to register and create badge for this person." etc.
3. Finally click the **Save** button at the bottom of this page to get a confirmation message.

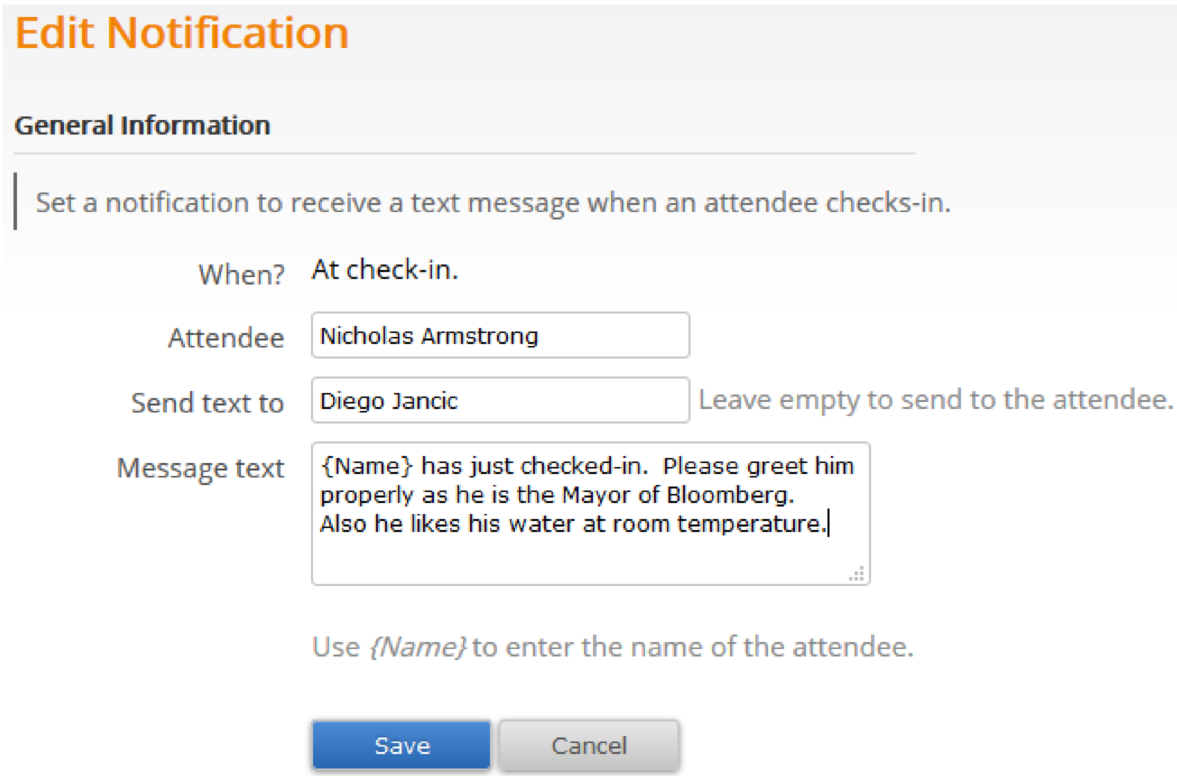


At this time if there were any notifications setup to go out they would be triggered and send the e-mail notification messages out.

New-Arrival Notifications

These are reminders that can be created when a special needs and/or VIP person arrives so you or others can be notified.

Create Notification: Use the **Create Notification** link in the orange box in the top-right corner of the screen to initiate a new Notification.



Edit Notification: Use the **View Notifications** button at the top of the page or use link in the orange box in the top-right corner of the screen entitled “View all notifications” to modify an existing **Notification**.

Delete Notification: When viewing all the notifications you can click the **Delete** link on the far right of the notification itself and confirm the OK in the popup message to delete an existing notification.

Badges

This is the section where you can design your own badge and print them out for your attendees.

View / Edit

You'll be able to see all of the badge designs you've created on this page. You can create as many badge designs as you'd like. To design a new badge, click on the blue **Create Badge** button. You can give your badge design a name and a short description. These options will appear on the right side of your badge when you create one:

- **Design**: This will take you to the badge designer for the badge. If this is your first time designing a badge, you will be taken to a templates page, where you can choose a template for your badge.
- **Print**: This will take you to the printing page with the specific badge design already selected.
- **Email**: This will take you to the email page with the specific badge design already selected.
- **Delete**: This will remove the badge from the list.

Change Sides

- **Design the Back**: This will take you to the designer for the back of the badge. It works the same as designing the front, except when you print the badge, you will have two sides for each badge.
- **Design the Front**: This will take you back to the front of the badge.
- **Clear the Back**: This removes any designs you've put on the back of the badge.

Be sure to click the Save button at the bottom of the page before moving to another side of the badge.

Toolbox

- **Size and Orientation:** Use this to set the badge type you want to use.
  - 3“ x 4” (Avery #5392)
  - 2-1/4“ x 3-1/2” Avery #5390
  - 3.370“ x 2.125” (CR-80)
  - 4 1/4“ x 3 2/3” (N6XLW)
  - 3 5/8“ x 5 1/2” (N4VME)
  - 4 1/4“ x 6” (NS2VW/NS2VR)
  - 4“ x 3” (On-Site Printer)

The default template used in our badge template is the 3” x 4” badge inserts (**Avery part number #5392** - 6 per page) and can be found using the Avery.com website or at retailers carrying Avery products.

Due to popular demand we also added additional badge options through another source at PCnametag.com which are used for the badge sizes/templates:

- 3.370" x 2.125" (CR-80)
- 4 1/4" x 3 2/3" (N6XLW)
- 3 5/8" x 5 1/2" (N4VME)
- 4 1/4" x 6" (NS2VW/NS2VR)

And we also added support for onsite printing using badge printers such as a Dymo printer that prints one 4" x 3" badge at a time.

- **Add Text Button:** Create a box where you can enter text.
  - **Font Size:** Adjust the size of the text.
  - **Font:** Adjust the type of the font used in the textbox.
  - **Alignment:** Aligns the text with in the box area you draw.
  - **Style: Bold**, *Italic*, and *Underline* options.
  - **Font Color:** Adjust the color of the text.
  - **Background Color:** Adjust the background color of the textbox area.
- **Add Image Button:** To add images to canvas the badges.
  - **View Original:** This opens the image in a separate tab/window so you can see the original size/image.
  - **Select:** Use to select the location and file of the image you want to insert.
  - **None:** Use this to remove all images from the image box.
- **Add Barcode:** This allows you to add either QR or Code 39 barcodes to your badges.
  - **Type:** Use this to select either **QR Code** or **Code 39** barcodes. We recommend using the **QR code** as they are ideal for readability using the **Conference Tracker** app with device's camera when tracking the Sessions.
- **Select Control** This is used to select a part of the **Badges** you want to edit and if selecting the boxes on the designer it lets you know what is the current item selection. A drop-down list shows all the elements that make up your Badges.
- **Canvas Properties**

- **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.

- **Show Border:** The default option is No. If you enable borders, you will see a slight gray border that surrounds each badge when you print them. They will typically align with the perforated edges of the paper size you use, but you can remove the border if they don't align properly.

- **Background Image**

  - **View Image:** It will open a new window showing the image of the Badges created.

  - **Change:** You can upload an image that resides on your computer. You can upload any normal image file type such as .JPG and .PNG.

The recommended image size to upload is based on the 3" x 4" badge design which is 1200 x 900 pixels. We recommend using at least 300 DPI which is industry standard for the best printing results. To calculate the pixels needed for other badge design background sizes you simply need to multiply the inches of the height and width of the badge by 300 [the DPI (Dots Per Inch)] to find the exact pixel count.

- **None:** Removes any background image upload.

Use these keywords in any text box:

User Keywords

- **$FirstName$**, **$LastName$**, or **$FullName$:** Displays the name of the Attendee.
- **$Title$** & **$Company$:** Displays the Position and Company Name of the Attendee.
- **$PhoneNumber$**, **$Email$**, **$StreetAddress$**, **$City$**, **$State$**, & **$ZipCode$:** Displays additional information about the attendee.
- **$UserCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each attendee.
- **$Sessions$:** Displays a list of all sessions this attendee is registered to at this conference.
- **$Credits$:** Shows the total number of credits the Attendee received.

Conference Keywords

- **$Conference$:** Displays the name of the Conference.
- **$Date$:** Display the date of the Conference.

Selection Options

There are 4 options you can do when you have any of the above items (images, textboxes, etc.) selected.

1. **Move:** To do this click anywhere on the item. Once it has the focus click and drag it anywhere on the canvas.

2. **Resize:** To do this simply click and drag the gray arrow located on the bottom-right corner of the box. ***Note:*** *you cannot make the box larger than the canvas size.*

3. **Edit:** To do this double-click the textbox or table and this will allow you to change the text. ***Note:*** *Images do not have this option as they have this option in their properties. additionally there is not an image editor in this designer so this means you'll have to edit the image outside of the **Conference Tracker** website before uploading them.*

4. **Remove:** Simply click the red ball in the top-right corner of the box.

Finalize the design

Be sure to click the **Save** button at the bottom of the page when done editing or click the **From Templates** button to start over.

Print

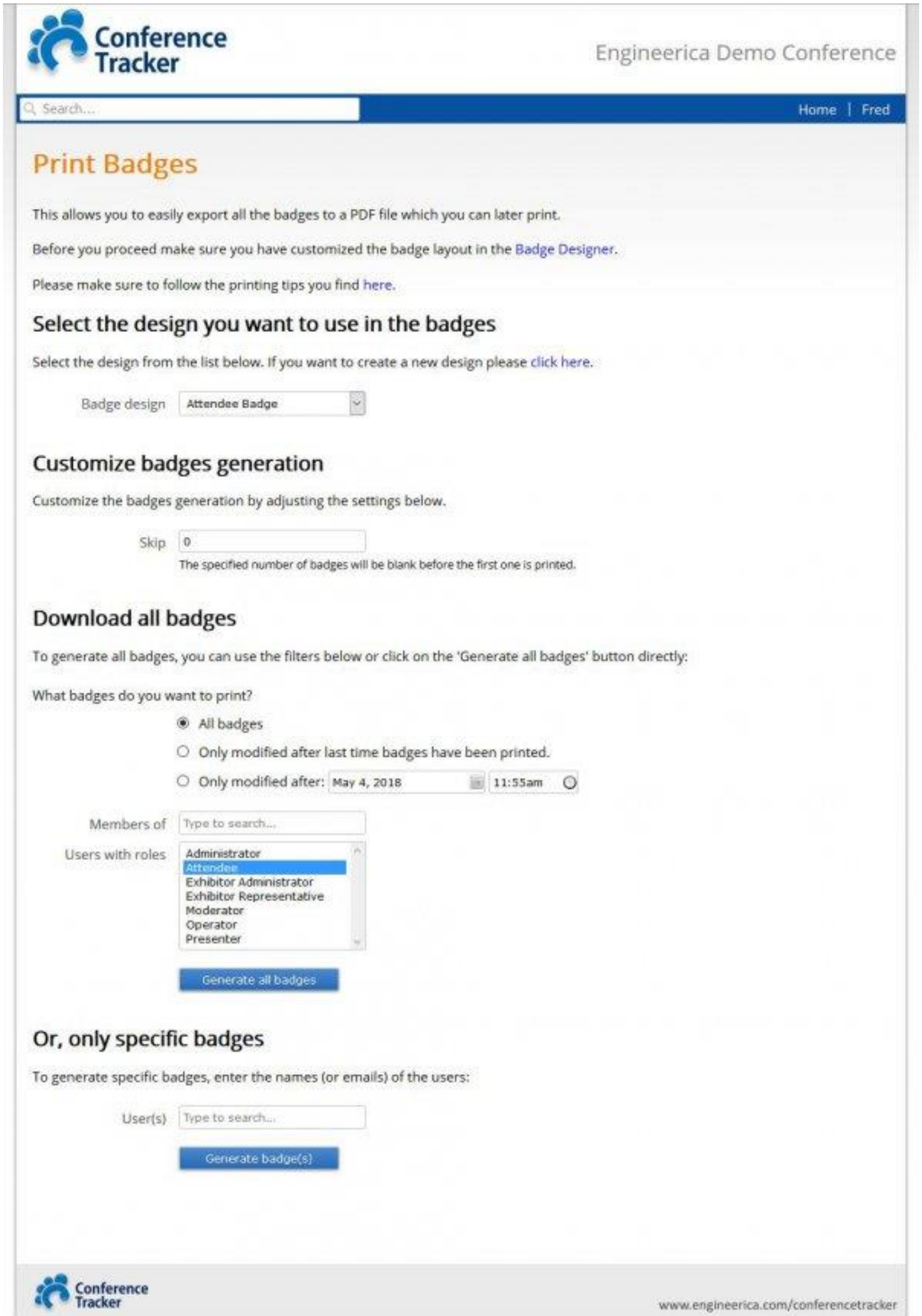
As an administrator, you may want to directly download the badges to print out and hand out to the Attendees. You can download it individually or all.

- Select the badge design from your list of saved designs using the drop-down menu next to **Badge Design**. This is the design that will be printed.

- You can adjust where the badge will start printing on the page under **Customize Badge Generation**. For example, there are six badges per page for a standard Avery #5392 template. By default, the **Skip** value is set to 0, which means the badges will print starting on the top left of the page. However, if you set the **Skip** value to 1, it will skip the first space, starting instead in the top right corner, resulting in five badges for the first page. This option is useful for reusing paper if you happen to be printing badges one at a time on one sheet of labels.

- To print all badges click on Generate all badges under section **Download all badges** and wait until the bottom section of the screen with the message Your badges are ready, click on View badges to download. You can also generate all badges for a certain **Group** by searching for the group using the **Members of** text field. You can print by a specific role as well by selecting the role from the **Users with roles** box. Select multiple roles by holding **Ctrl** and clicking.

- To print only a single badge click on Generate badge under section **Or, only one badge** and wait until the bottom section of the screen with the message Your badges are ready, click on View badges to download.



A confirmation screen will show at the bottom of the screen and click on **View Badges** to print out.

The Avery part number for badges that you need is #5392 and uses template number #74541. They are 3" x 4" badge inserts (6 to a page) and can be found at Avery.com by clicking here or at retailers carrying Avery products.

First please download the PDF file, save it, and open it in Adobe Acrobat Reader DC to print the Badges and avoid excessive wasting of badge paper. This will ensure that when you go to print the badge you can choose to "Use Actual Sizes" when it prints. The default action is of many web browsers and Adobe Reader is to "Shrink to fit" the print-out on the page. Read the next article to learn more on how to correct this issue.

How to align the badges with the paper?

The **Conference Tracker** badges are in Adobe **PDF** format. We recommend that you use the download the Adobe PDF Reader to open the badge file. If you do not have this, download the free Adobe Acrobat Reader DC direct from Adobe.

The default **Print Size** setting in Adobe Acrobat Reader DC will produce incorrect badge formatting.

Change the settings in the Adobe Acrobat Reader DC to fix this issue. Below is how:

1. From the Adobe Acrobat Reader DC menu, select **File → Print**.

2. In the **Print** dialogue box, under the **Page Sizing and Handling** section, by default the selected setting is *"Shrink oversized pages"*. ***This is the wrong setting for printing Conference Tracker badges!***

3. Change this option to "Actual size". You should now be able to click the Print button with the correct alignment on your Conference Tracker badges.

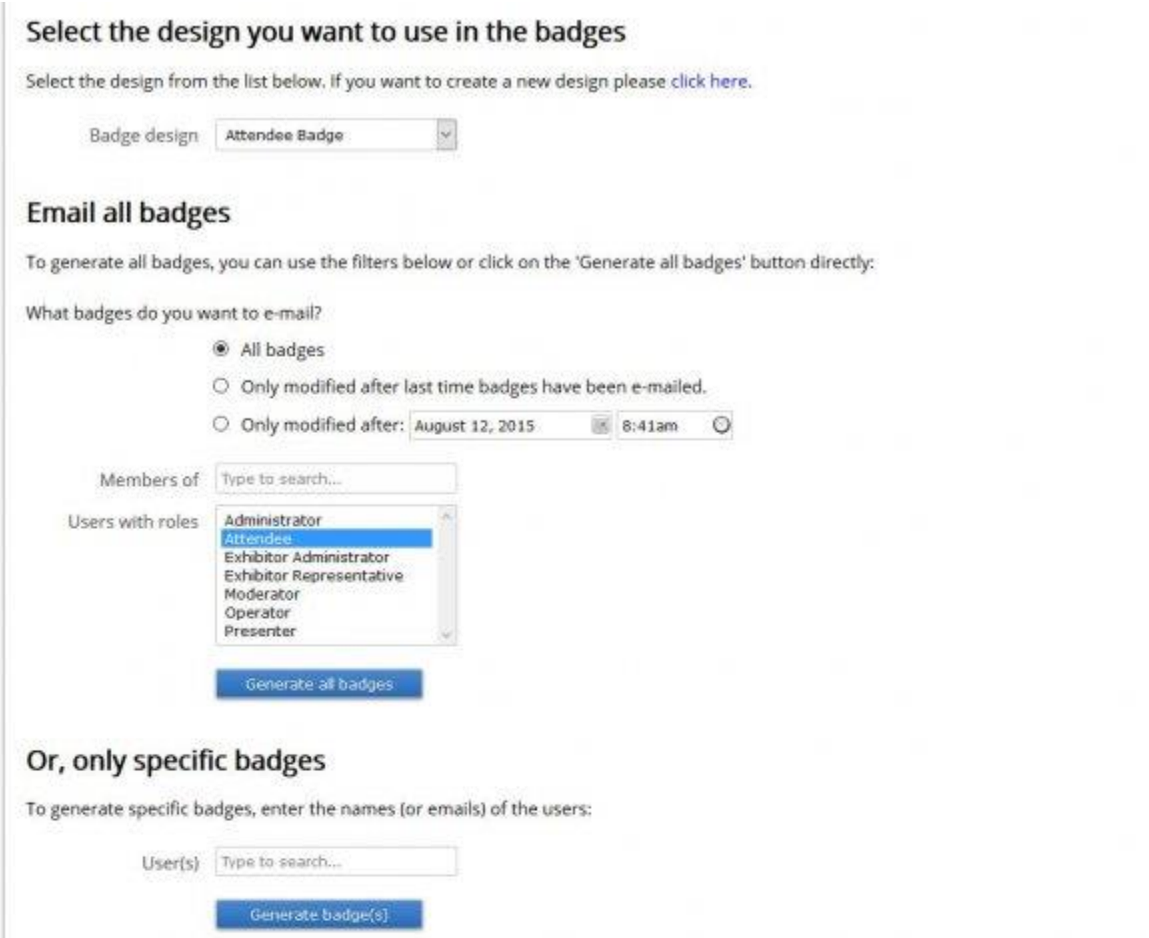
Email

If you prefer to email the badges to the attendees you can email them individually or send the badges out all-at-once for the Attendee(s) to print. This may save you on some printing costs so you only have to print the badges that people forgot or misplaced at the conference.

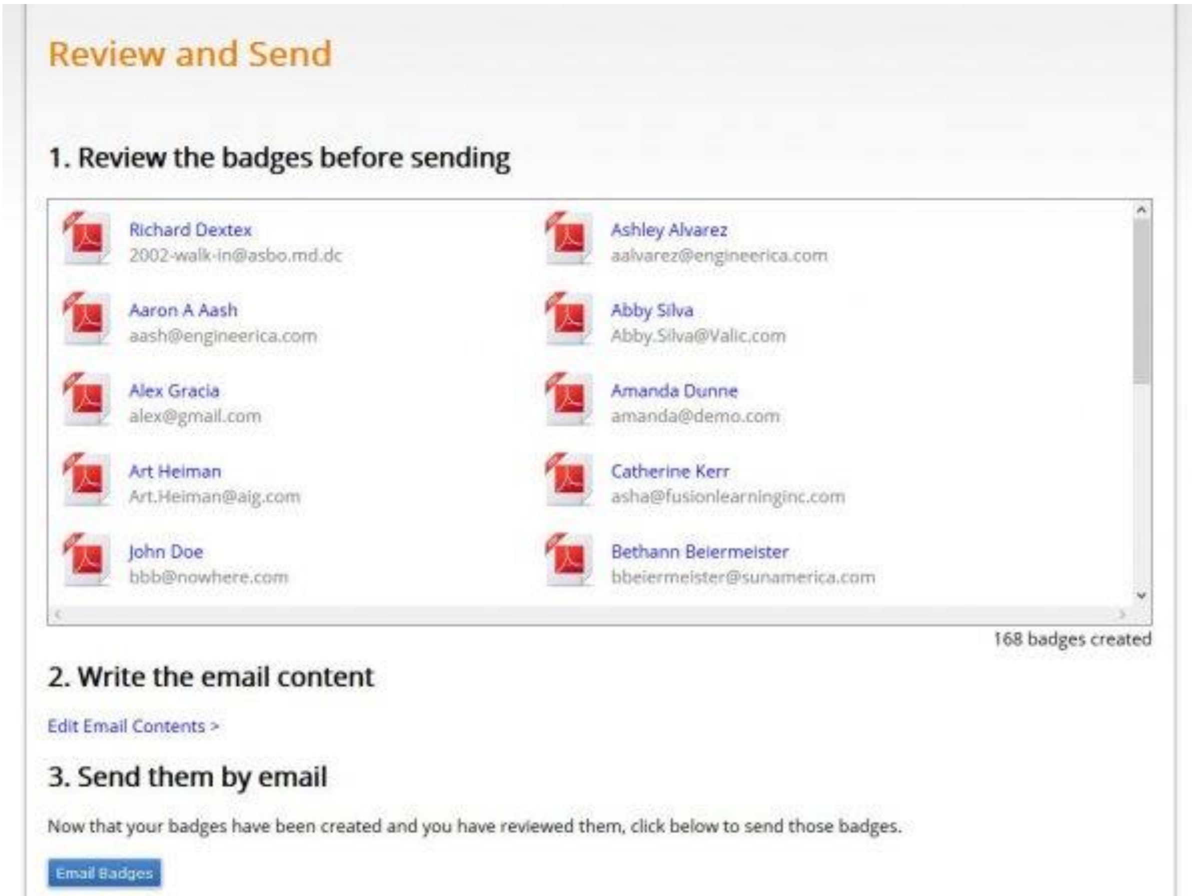
- Select the badge design from your list of saved designs using the drop-down menu next to **Badge Design**. This is the design that will be emailed.

- To email all badges click on Generate all badges under the section **Email all badges** and wait until the next "Review and Send" screen appears with the list showing all of your badges. At this point you can preview the individual badges you want to send out. Click on Email badges to send the badges to all Attendees.

- To email only a single badge click on Generate badge under the section **Or, to only one attendee** and wait until the next "Review and Send" screen appears with the list showing the individual's badges. At this point you can preview the individual badges you want to send out. Click on Email badges to send to the selected individuals.



Next you will get a screen to analyze the badges you selected before they are emailed to the attendees. You also have the option of making changes to the body of the email by clicking on **Edit Email Contents**.



Finally click the **Email badges** button.

Print QR Labels

This is an option for those who already have their own badges but do not have barcodes on them to scan. Typically these are printed out and attached to the back of the badge. In this section it produces a printable sheet of 24 QR codes on 1-1/2" x 1-1/2" squares with the names and card numbers of each **Attendee**. Recommended printing with *Avery® Easy Peel® White Square Labels 22805, 1-1/2" x 1-1/2", Pack of 600*.

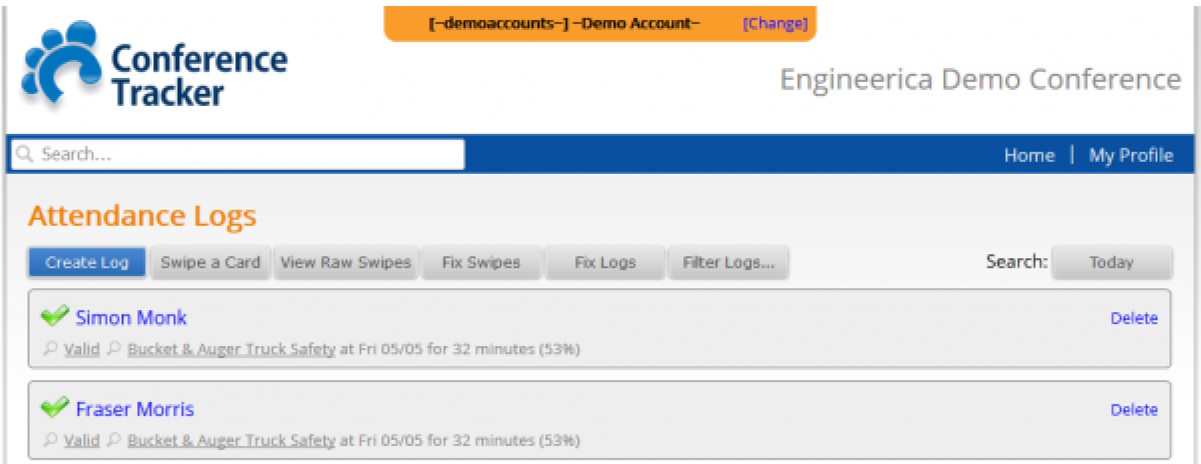
To quickly print all the **Attendees'** QR labels click the **Print** button. You can also filter based on individual **Attendees** or **Workshop Registration** to get only the labels you want.

Attendance

This is where you can track where people are, what they are doing, and the Instructor they are with.

View/Edit Attendance Logs

In this screen you can see each attendee's sign-in logs in a list. As well as edit each part of the existing **Attendance Logs** as shown below:



- **Attendance Status** - This is the first option displayed and shows the validity of the **Attendance Logs** which is explained further in the Filter Logs... section.
- **Attendee Name** - This is displayed the name of the attendee
- **Workshop/Session** - This displays the **Session/Workshop** the **Attendee** has attended.
- **Date** - This option displays the date of the attended **Workshop/Session**.
- **Time in the Session:** - Next is displayed the total time spent in this **Session/Workshop**.
- **Percentage in the Session** - Finally this displays the amount of time spent in the class based on the start/end times of the class and their sign-ins and sign-outs.

Read the next sections that cover all the buttons available on the **Attendance Logs** toolbar.

Create Log

The purpose of this section is not to track conference attendance as we have a much better system setup using our Conference Tracker App for Apple and Android devices but is used when you need to add logs that for some reason was not able to be scanned into the system via the app after the workshop has happened.

When you can click the **Create Log** button on the **Attendance Logs** toolbar this is what you can add:

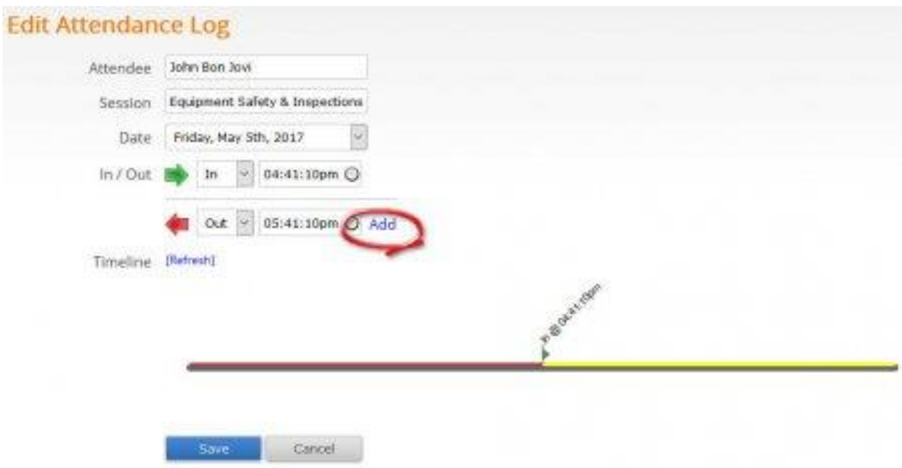
1. Assign the **Attendance Log** to an **Attendee** by searching for their name and selecting them in the results.

2. Next choose a **Workshop/Session** that you want to create an **Attendance Log** for the **Attendee**.

3. Then you'll need to set the proper date for this Attendance Log.

4. Finally add the **Sign-in** and **Sign-out** Times (if requiring Sign-out) and click the **Save** button at the bottom of this page. There will be a preview of their timeline to ensure the times added make sense.

When you set the **In/Out** status and select the **time** including the AM/PM be sure to click the **Add** link on the end of each sign-in/sign-out for this log to



save the sign-in or sign-out properly before proceeding to click the **Save** button at the bottom of this page. Notice that once this is done the **Timeline** shows correctly as well.

If the **Date** and **In / Out Times** does not match the actual **Workshop** date and is during the start/end times of this **Session** then the log you are creating may be considered as one of the errors called **Duration less than minimum** and the **Attendee** will not get credit until the log is corrected.

Swipe a Card

The purpose of the **Swipe a Card** button on the **Attendance Logs** toolbar is to *add a log for an Attendee that you may have not been able to swipe-in/out at a workshop through the app.* This feature may also replace the app to scan Attendees from a Computer but is not the preferred or recommended method. This is because the swipes entered in on this screen are recorded at the exact date/time they are entered.

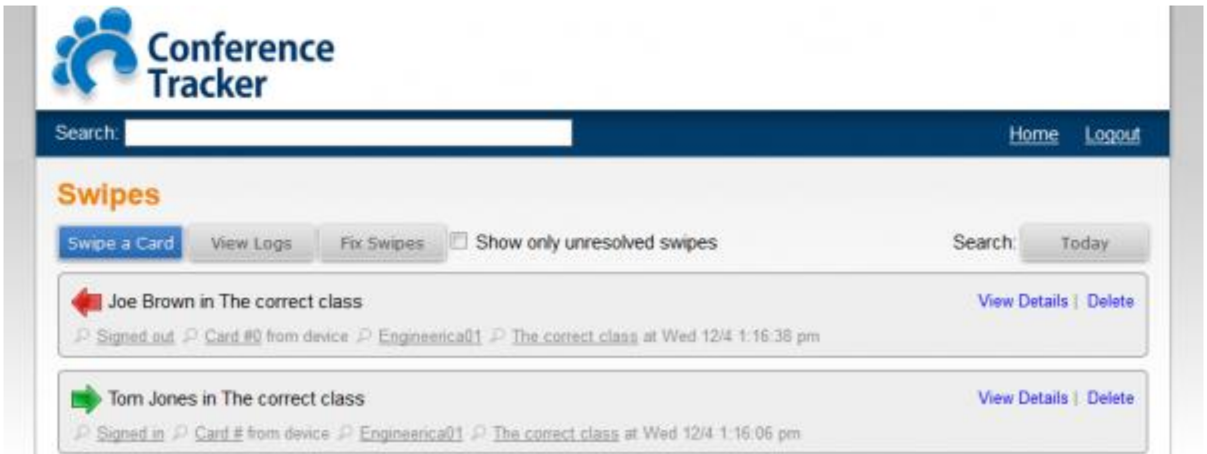
This is not the ideal way to track attendance using **Conference Tracker** as additional hardware such as a barcode scanner may be required or you'll have to type in their ID numbers for each attendee manually. As well you cannot leave this screen unattended as it is not made to act as a kiosk tracking sessions without an device **Operator** or **Administrator**.

Here are exact steps to swipe-in/out **Attendees** to a **Session/Workshop** manually not using the Conference Tracker app (which is the preferred method):

1. First, select the swipe **Type** of either **Sign-In** or **Sign-Out**.
2. Next, type in the **Session/Workshop** name to search and select an available **Session/Workshop** you want to track.
3. Now type or swipe the **Attendees'** ID number/magstrip/barcode to enter it in the **Attendee** box.
4. Finally you must click the **Save & Swipe Again** button to save this swipe.

The first 2 options will remain selected to allow you to simply swipe or type the next **Attendees'** ID number/magstrip/barcode to enter it in the **Attendee** box.

View Raw Swipes

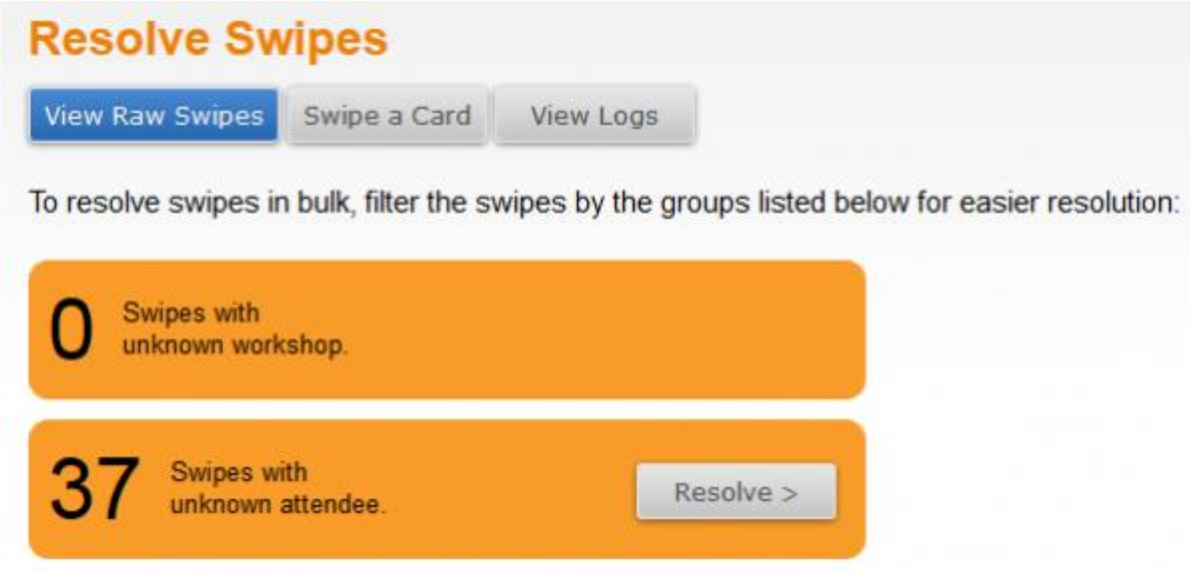


This screen displays the made swipes. A "Missing data" is displayed when an unknown attendee made a swipe in a workshop or a Room. You can place a check in the box next to **"Show only unresolved swipes"** to view all of the swipes that are "Missing data" or "Unresolved" at the moment. An operator can help by inputting comments while swiping in each Attendee. If they added some information to help resolve the swipe you can see the follow items:

- **When:** Displays the date ant time of the swipe.
- **Card#:** Displays the card number and the name of the attendee assigned to.
- **Room:** Display the room where the swipe was made.
- **Attendee:** Displays the name of the attendee.
- **Workshop:** Displays the session where the swipe was made. Also displays any operator comment.

If you want to go back to the **Attendance Logs** from this screen click the **View Logs** button.

Fix Swipes



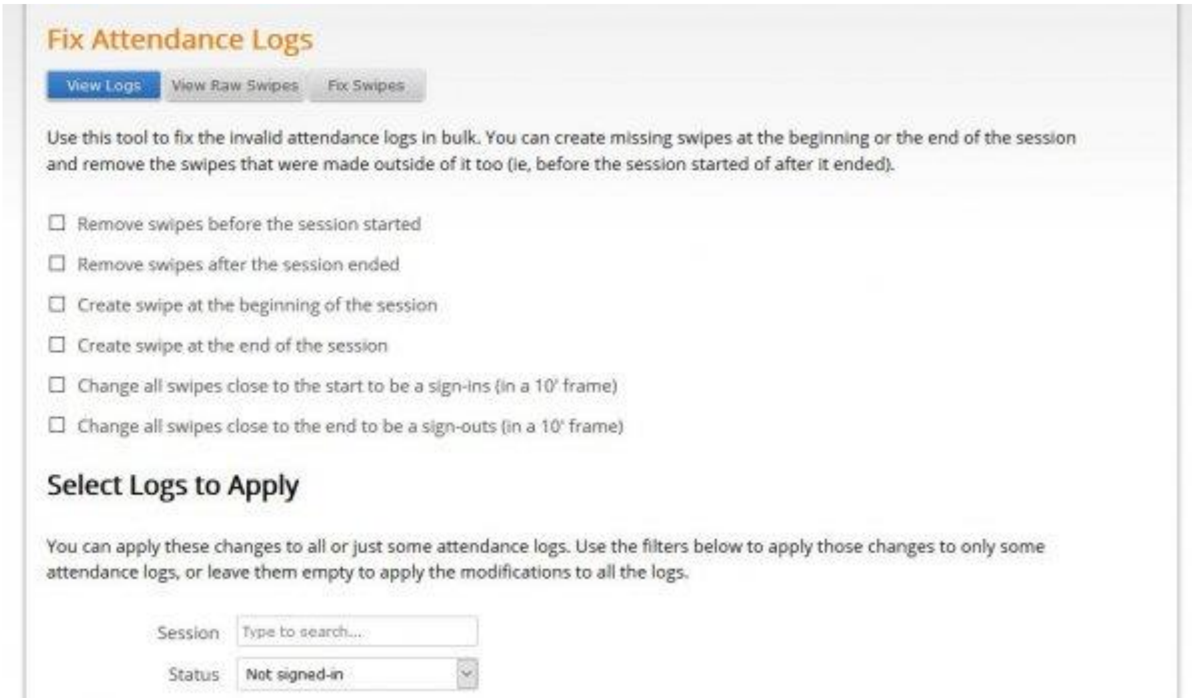
Some scans during a conference may end up being a **Unresolved Swipe**. **Unresolved Swipes** are instances of scans that were successfully taken, but the scan could not be assigned to an attendee. This usually occurs if the device that is scanning attendees is not **Synced** properly or if the Operator made a mistake while entering an attendee manually. Clicking on **Resolve** will show the complete list of **Unresolved Swipes**.

You will be able to see the Date, Time, Session, and Card Number of the scan. Typically, the system will automatically be able to match up the number with an attendee, and the option to **Use *Attendee Name** will appear to the right of the log. This will automatically resolve the swipe and place it in the **Attendance Logs** section of the website.

However, if the system could not match the number to an attendee, you will instead have a search box to the right of the log. You will have to determine yourself who the attendee is and assign the log to them.

It is important to resolve these swipes, as attendees with unresolved swipes will **NOT** earn credit for attending the session.

Fix Logs



You can use this tool to bulk fix all logs in a specific session. You have these options available to you and they can be used one at a time or in combination with each other:

- **Remove swipes before the session started**: This will will remove any swipes done before the session start time.
- **Remove swipes after the session ended**: This will remove any swipes done after the session end time.
- **Create swipe at the beginning of the session**: This will create an "In" swipe at the session start time.
- **Create swipe at the end of the session**: This will create an "Out" swipe at the session end time.
- **Change all swipes close to the start to be a sign-ins (in a 10' frame)**: Any swipe within a 10 second time frame of the session start time will be converted to an "In" swipe.
- **Change all swipes close to the end to be a sign-outs (in a 10' frame)**: Any swipe within a 10 second time frame of the session end time will be converted to an "Out" swipe.

After selecting the changes you want to be made on the logs, select a session from the **Session** field and then choose the type of **Invalid** log you want changed.

Once complete, select **Apply Changes** at the bottom of the page.

This tool can **NOT** be used to create swipes. It can only be used to modify existing swipes.

Filter Logs

Now if you want to only see the logs needing correction then click the Filter Logs button and select one of the following options:

1. ***Duration is less than minimum*** *- This just means they were not there for the required percentage of time to get credits.*
2. ***Not Signed-in*** *- This means that the* ***Attendee*** *did not swipe-in to the* ***Workshop/Session*** *and needs to have a swipe-in added to their log for that particular* ***Workshop/Session****.*
3. ***Not Signed-out*** *- This means that the* ***Attendee*** *did not swipe-out to the* ***Workshop/Session*** *and needs to have a swipe-out added to their log for that particular* ***Workshop/Session****.*
4. ***Multiple Swipes*** *- Having 2 sign-ins, 2 sign-outs, or a sign-out before a sign-in, etc.*

More Actions

This section describes clickable options that are available on each of the individually listed of **Attendance logs**.

Edit Log

Simply click the **Attendees** name on any of the given logs to make changes or correct errors on their **Attendance Log**. You'll notice this option being used quite frequently while correcting the Attendance Logs using the Filter Logs... options.

Delete Log

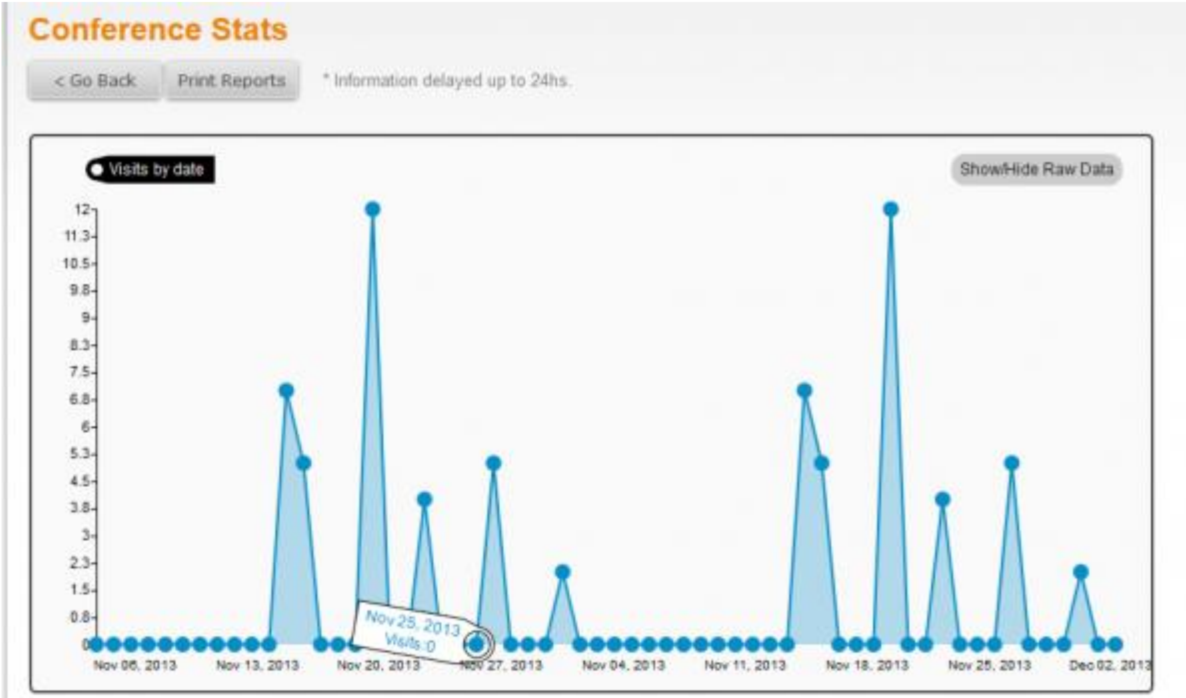
This option is located on the far right of every individual **Attendance Log** and is not recommended unless needing to cleanup test **Attendee** scans in/out of a test **Session** prior to the conference.

This option is permanent and will not be recoverable. If you happen to click on this option by accident simply click the **cancel** option in the pop-up window to stop the removal of the selected log. Realize an **Attendance Log** is a collection of all the **sign-ins and sign-outs** for an **Attendee** to a specific **Session**. So if they are deleted you would have to add all these **Swipes** back into the system manually (that is if you can even recall the **Attendee** and what **Session** they belonged).

Conference Analytics

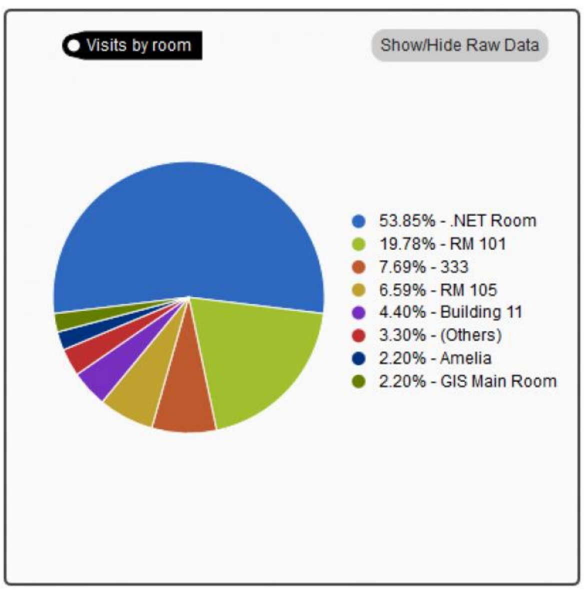
This is a great tool to analyze the effectiveness of your workshops based on the volume of Attendees participating in the workshops. This may also help to determine what days or times of the day during the conference were the busiest in order to staff more Operators or Administrators to help. This may also help when trying to balance the usage of the rooms during the conference. With this information you may notice that you have rented too many rooms or not enough.

Visits by Day



In this first chart you will see a line graph of the busiest days during your conference.

Visits by Room



This is a chart where you see a pie chart showing usage of the Rooms during your conference.

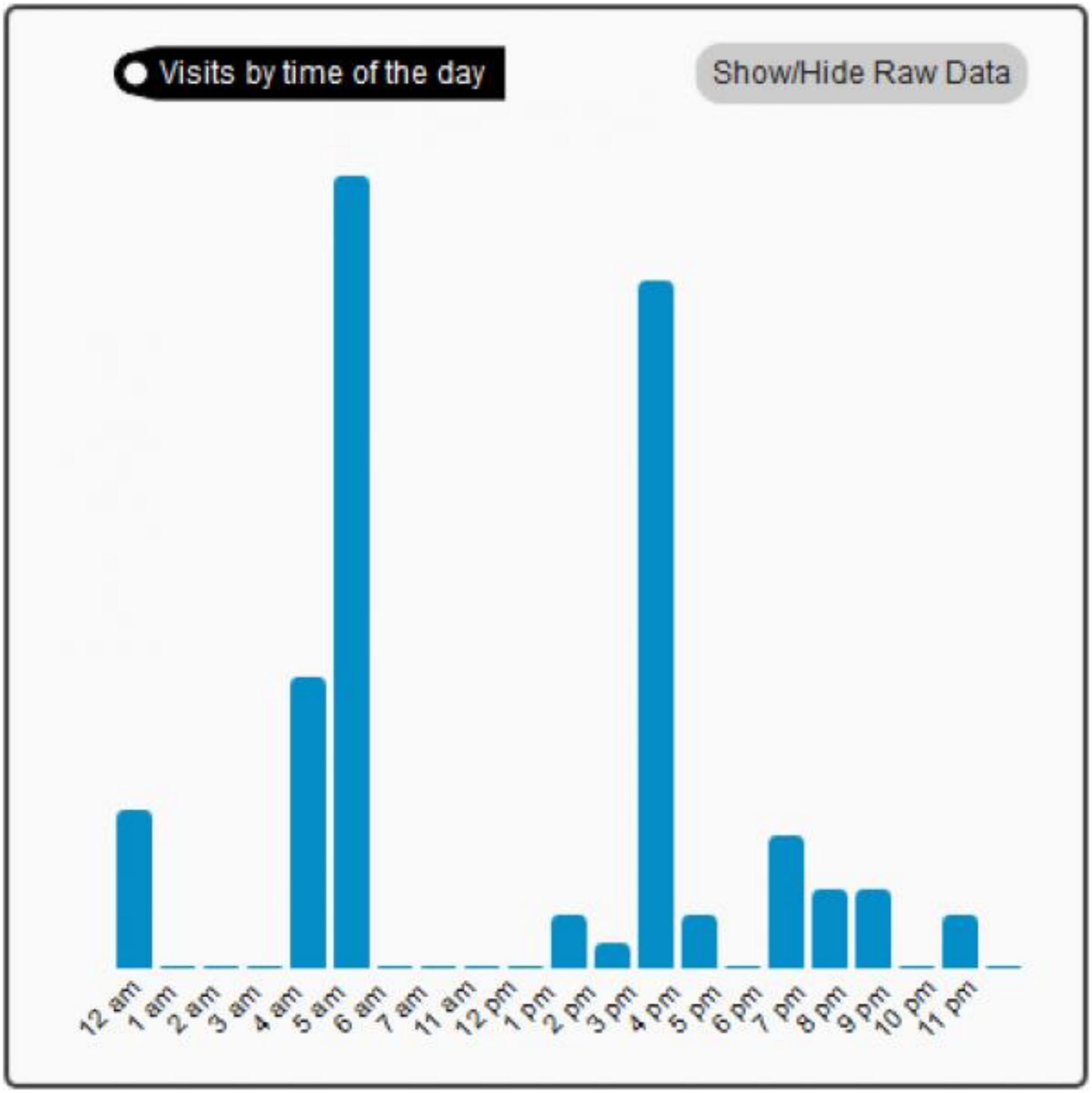
Top 50 Workshops

Top 50 Workshops

Session	# of Attendees
General Session Test	12
Dam Safety	9
Starwood Hotels	7
Required Session Test	6
AL Dept. Education	5
Florida Chiropractic Physician Association	5
Phi Kappa Psi Fraternity	5
Basic Workshop	4
Hawaii Foods	4
La Rural Water Association	4
Dealers United	3
International	3
Resume Writing	3
Verizon Training	3
Feathers Vegan Lecturre	2
GIS Intro Day 1	2
GIS Sign-In	2
Institute for Patient and Family Centered Care -	2
International Education	2
Learning iConf - The easy way	2
LERN	2
Shipping	2
Mobile to the Future	1
Training	1

In this chart you will see a list of the highest attended workshops during your conference.

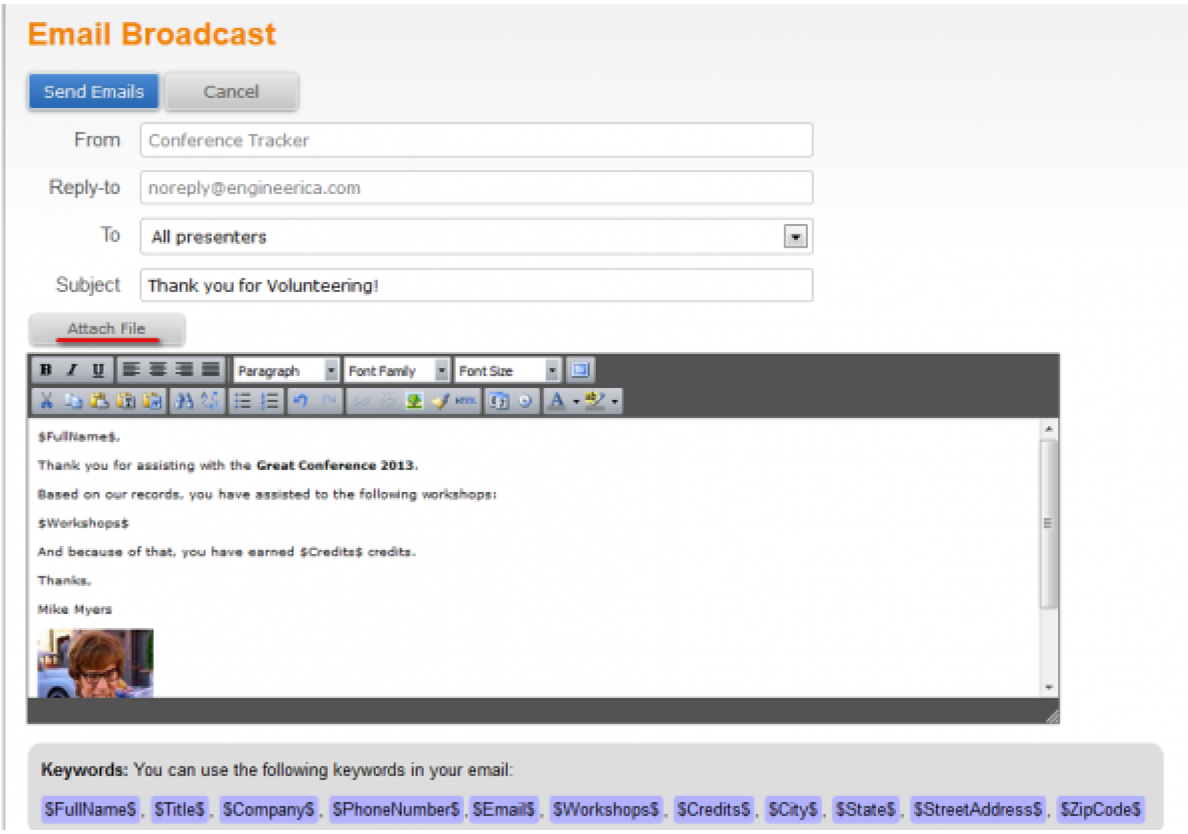
Visits by Time of Day



In this final chart you will see the busiest hours of the days during your conference.

Email Broadcast

This is a great new tool to communicate with any group of users from **Administrators**, **Exhibitors**, **Presenters**, and more! At the same instance you can e-mail just one specific attendee or even just a couple of them. Maybe you have received their registration but not their dues or deposit then simply write them an e-mail directly in Conference Tracker. As you can see from the e-mail below they are sending a message out to all Presenters thanking them for their help at the conference.

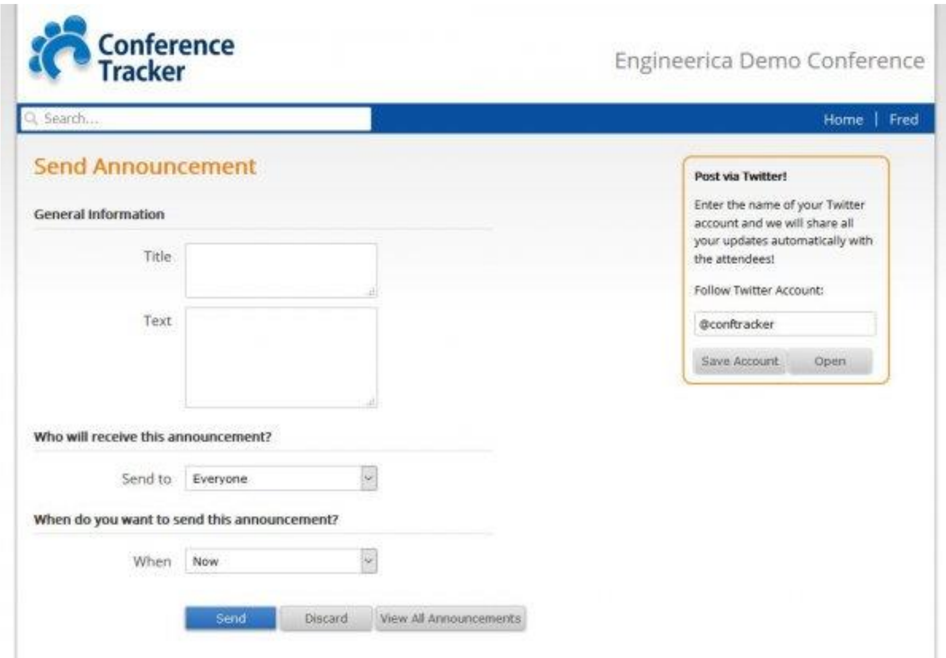


Just like in the Badge & Certificate Designers you can add Keywords to display the name of a Presenter, the workshops they attended, etc. This can all be done using Keywords such as:

- $FullName$
- $Title$
- $Company$
- $PhoneNumber$
- $Email$
- $Workshops$
- $Credits$
- $City$
- $State$
- $StreetAddress$
- $ZipCode$

Announcements

This function allows you to send a notification to every attendee using the Attendee app. If push notifications are enabled on their devices, it will appear as one. Attendees are also able to access past announcements using their app. Twitter integration is also possible, allowing tweets to be sent as live announcements.



Creating an Announcement

You can send an announcement immediately or schedule announcements to be sent automatically at certain times. Follow these steps to create an announcement:

1. **Enter the title of the announcement**. This is the message that will be displayed when the attendee first sees the announcement.

2. Optionally, **you can enter additional text to the announcement**. The attendee will be able to read this additional text if they open the announcement on their app.

3. **Choose who will receive this announcement**. The default setting is to send the announcement to every attendee. However, you can choose to send the announcement to a specific attendee, as well as to the attendees of a specific session.

4. **Choose when to send the announcement.** If you have the setting set to **Now**, simply finish the announcement by clicking on the **Send Now** button. If you choose to schedule a date and time, you must select a day and time to send the announcement on. Click on **Schedule** to finish scheduling your announcement. Conference Tracker will automatically send out the announcement at the appointed time.

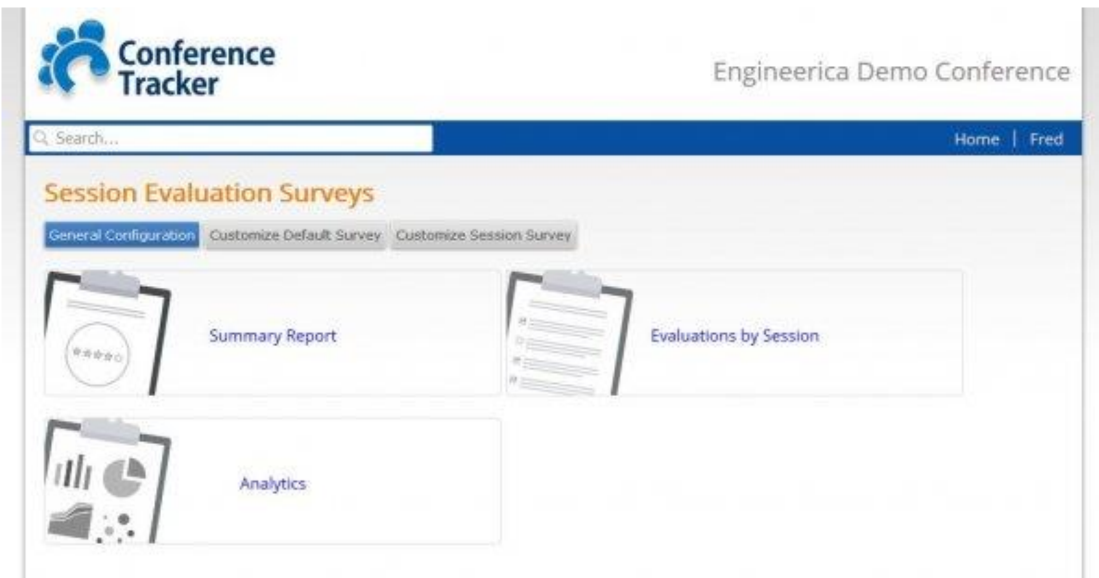
You can view all past and future announcements made by clicking on **View All Announcements**.

If you schedule an announcement, make sure that it is exactly how you want it. You can not make changes to an announcement once you've scheduled it.

Session Evaluation

This section allows you to create satisfaction surveys for your attendees to take. Surveys can only be completed by attendees using the Attendee app. Attendees will be asked to complete a survey upon entering a session, but they can also manually access uncompleted surveys using their app. Each survey question can be answered using a number scale of 1 to 5. You can customize two different surveys: the default survey and the session specific survey. The default survey is asked instead if you don't create a session specific survey for a certain session. You also have the option of restricting attendees from earning credits until they've completed a survey.

- **General Configuration:** You will be able to enable and disable session evaluations here by either marking or removing the check on the **Enable session evaluation surveys** box. Marking the **Allow open comments** box will give the attendees a chance to write a text comment at the end of each survey.
- **Customize default survey:** This section allows you to create the questions for your default survey.
- **Customize session survey:** This section allows you to create the questions for each session. Search up the session you would like to create a survey for and you will be able to change the questions asked on the survey.



Survey Results

You have the ability to see the results of your surveys in three ways:

- **Summary Report:** This report will display a list of every session that had at least one survey completed for it. It shows the average ratings for each session and also will indicate how that average compares to the average ratings of the entire conference.
- **Evaluations by Session:** This section will allow you to search up a specific session and generate an average ratings report for the specified session.
- **Analytics:** This section will allow you to access a ratings distribution chart for each question asked at each session. Simply click on the **plus sign** next to each question to display the chart. It also displays the number of attendees that answered each question and survey. You also have the option of printing out the report.

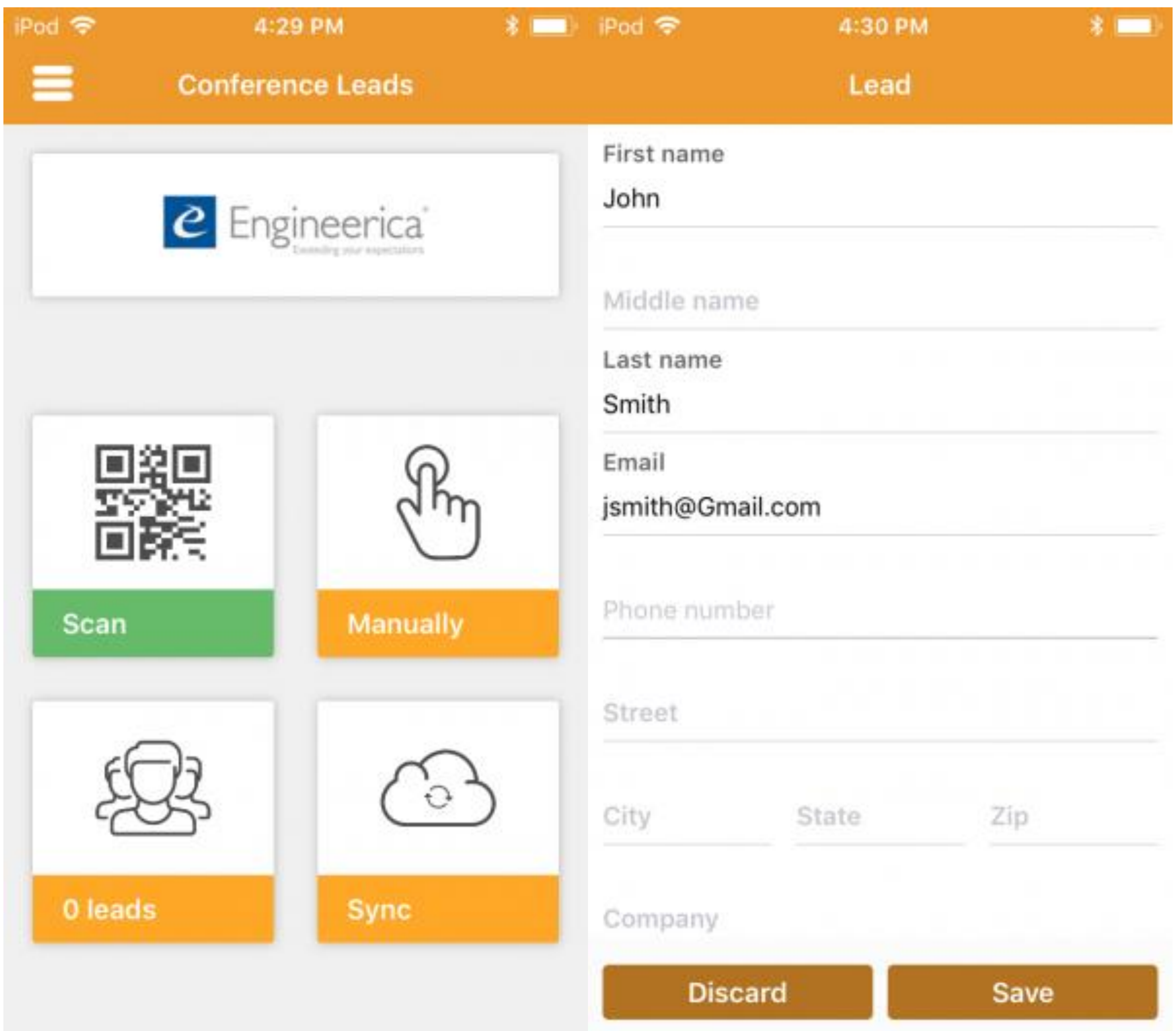
Lead Retrieval

This is the area where you can create, view, and edit the leads you have obtained during the conference.

Leads

In this section you will see all the leads you have tracked as an exhibitor or if you are an admin you will see all the leads tracked.

You must create an **Exhibitor** by clicking **Exhibitors** in **Lead Retrieval** section and then clicking the **Create New** button. While adding the exhibitor's Information it will ask you to fill in their first name, last name, e-mail, and to set their password. You'll also note their role is pre-set as an exhibitor.



Exhibitors can log on to the **Leads** app [(Apple Store Download)](#) with the credentials provided by a conference admin to start collecting leads. Once they have scanned the badges of Attendees the stored user information in conftrac.com will become available for them to retrieve after the conference. The

Exhibitor may also quickly add notes to each scanned attendee to save for future reference. Using the same login credentials via http://conftrac.com will get them access to an export file of these leads and notes.

Online Exhibitor Registration

How to Access: Lead Retrieval > Exhibitor Online Registration

This is where you can create the registration form for the exhibitors to fill-out and also approve the exhibitors once they start completing the online registration form. Here is an example of a registered attendee who completed the online form:

In order to use this feature you must first go to the **Basic Info** under the **Conference** section and check the box for ***Enable Registration*** and save.

Create/Edit Registration Form

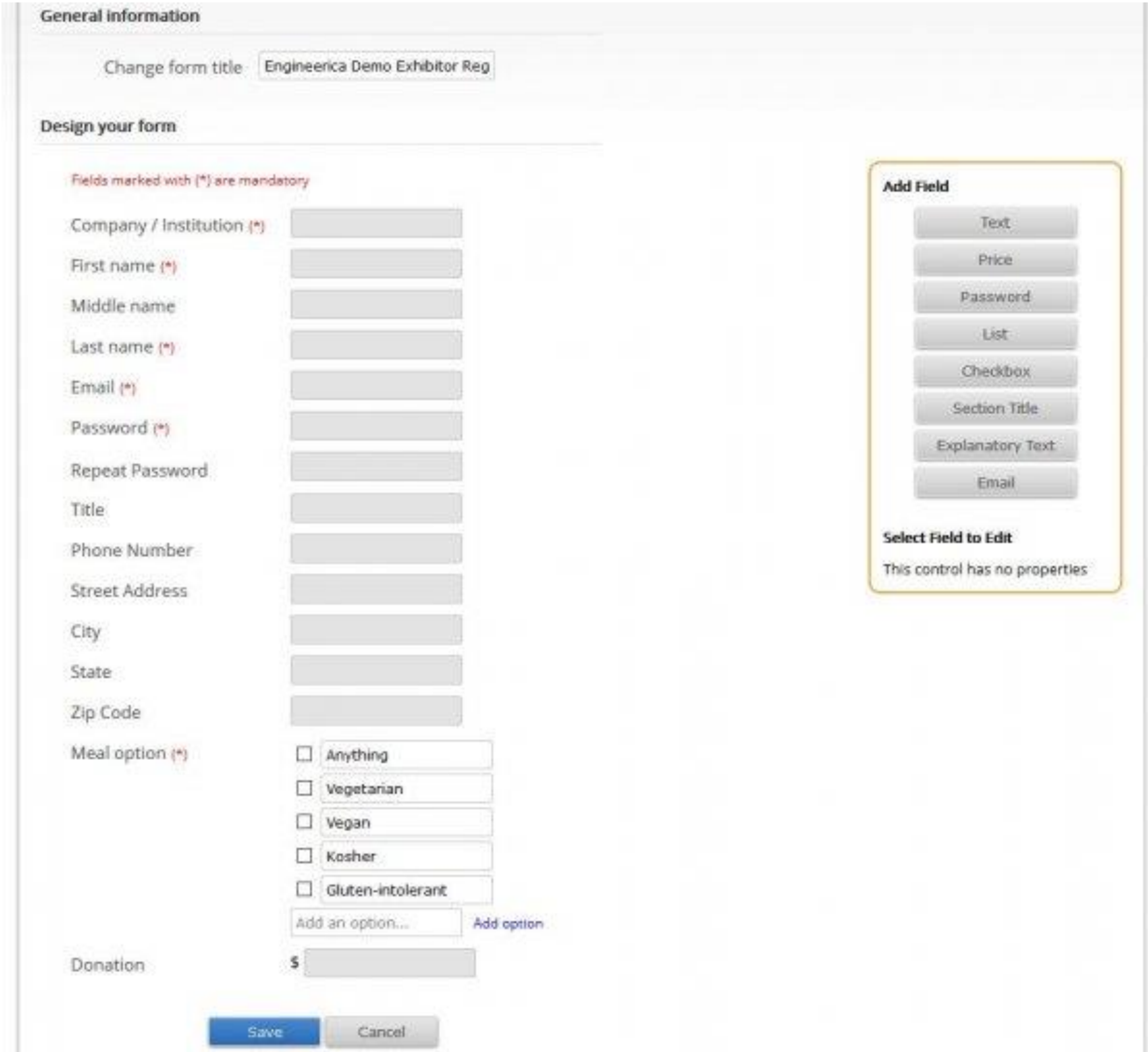
If you have already enabled Online Registration you can now edit your registration form by clicking the **Edit Registration Form** button. Here you can add your own custom fields in addition to the default fields in the system. There are 7 types of fields:

1. **Textbox** - The purpose of this item is simply if you want to get a text response from the registrant.
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).
2. **Price** - The purpose of this item is to allow your registrant to add any price value to their final payment (Typically used for donations).
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).
3. **Password** - This item is basically a text box that hides the characters and could be used to hide sensitive information. Note: You'll get 2 fields so the user will have to verify the information.
    - Properties:
        - **Required** - Use this option to make a response required (Yes) or optional (No).

- **Minimum length** - Use this option to set the minimum length required for the password.

4. **Listbox** - The purpose of this item is to allow the registrant to select one or multiple item(s) from a list of options. Note: You can now add prices to these options to be tallied on final payment.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
     - **Multiple selection** - Use this option if you want the registrant to have more than one selection.
     - **Allow Prices per Option** - Use this option if you want to associate prices with each list item that will be added to their final payment.
5. **Checkbox** - The purpose of this item is to allow the registrant to check a box on the registration form (typically used to confirm consent).
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
6. **Section Title** - The purpose of this item is to separate portions of the form with headings.
7. **Explanatory Text** - The purpose of this item is to provide additional information to registrants while they are completing the form.

To **add** them simply click the button on the far right to add each of the field types. To **edit** the text simply click the text to the left of the field. To **delete** a field click the red ball to the right of the field as shown below. Be sure to save after you're done with the **Save** button at the bottom of the form.



Registration Options

The other options aside from editing the registration form you have here allow you quickly confirm all registrations using the **Confirm All** button and the Share Option.

Confirm All

Confirm All could possibly be used if you want to quickly add every received registration form regardless of it's phase. This will make more sense after reading **The Registration Process** section below.

Share

This area allows you to get iframe html code to add the registration form to your own website, offers quick Social Media options to share information about registering for the conference, and finally a direct link that you can e-mail to possible exhibitors so they can register for the conference.

Send Payment Instructions

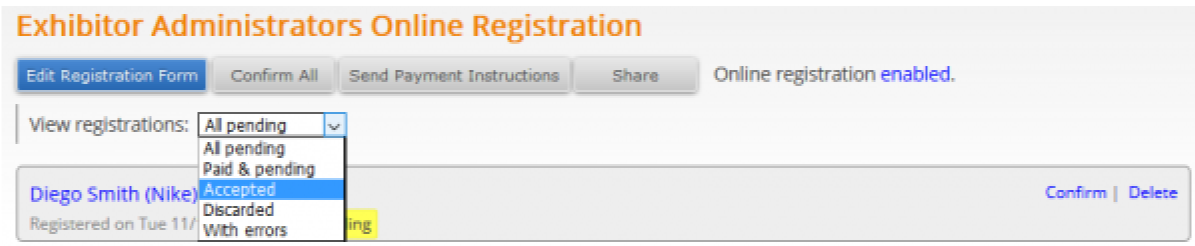
Use this button to send all the pending exhibitors the payment URL/information to complete the process through PayPal. This is only necessary if you are using PayPal through **Conference Tracker** and online payments are activated.

The Registration Process

This area can get confusing for first time users so this next section is here to help clarify the process of exhibitors registering for the conference.

The next topic to discuss is the life-cycle of a registration goes through several phases in this order:

1. **Pending** or **With Error**
2. **Paid & Pending** (Can be skipped if you set to auto-accept paid registrations.)
3. **Accepted** or **Discarded**.



Pending

This means that the **Attendee** has filled out the registration form but it has not been approved. This phase is when the attendee has not paid for the Conference. From here you can select the option on the Attendee's line to "Send Payment Instructions" as pictured above.

With Error

These are the registration forms that have been completed with errors. Several examples may be the e-mail address was formatted incorrectly like "mi ke@abc.com" or the phone number is missing a digit like "407-555-555_". Here you'll have the ability to make these corrections.

Paid & Pending

Exhibitors will only show up in this phase if "Auto-accept when payment received" is not turned on in the conference settings. Here you can manually accept the exhibitors who've paid their registration fees.

Accepted or Discarded

These are lists of all the Accepted Registrations and Discarded ones you chose to delete.

Accepted

This is a list of all the Accepted Registrations.

Discarded

This is a list of all the Registrations Discarded you chose to delete.

You can look at each of these using the drop-down box labeled *View* in the top right of the Online Registration screen (pictured in the screenshot above).

Exhibitor Administrators

How to Access: Lead Retrieval > **Exhibitor Administrators**

This is where you can manage your **Exhibitor Administrators** information.

Create: Simply click the **Create New** button at the top of this screen.

Edit: Click on the name of the Administrator you would like to edit.

Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

If you accidentally clicked the **Delete** link click the **Cancel** button to go back.

View Limits: Click the **View Limits** link to see exactly how many exhibitor representatives they are planning of having attend or are allowed according to the number of exhibitors registered. As well if they purchased the **Conference Leads** app through the **Online Conference Registration** you'll see how many license they paid to use.

Exhibitor Representatives

How to Access: Lead Retrieval > **Exhibitor Representatives**

You can manually create exhibitors in the **Exhibitor Representative/Administrator** page. You can access the Create New Exhibitor screen by clicking on the **Create New** button on the Exhibitors screen.

Once you have entered at least the minimum information (first name, last name, e-mail and password), press the **Save** button to create the Exhibitor.

Exhibitors can also be imported if you have a list of them with the minimum required information such as First Name, Last Name, and E-mail Address. Middle name and Card ID can be added as well.

Certificates

This is where you can design, print, and/or even e-mail certificates for the conference.

View / Edit

You'll be able to see all of the certificate designs you've created on this page. You can create as many certificate designs as you'd like. To design a new certificate, click on the blue Create Certificate button. You can give your certificate design a name and a short description. These options will appear on the right side of your certificate when you create one:

- **Design**: This will take you to the certificate designer for the certificate. If this is your first time designing a certificate, you will be taken to a templates page, where you can choose a template for your certificate.
- **Print**: This will take you to the printing page with the specific certificate design already selected.
- **Email**: This will take you to the email page with the specific certificate design already selected.
- **Delete**: This will remove the certificate from the list.

Design Your Certificate

This is where you can fully customize your Attendees certificates or just choose from several preset templates.

On this screen you can design the certificates for your Attendees. Using the following sections:

Toolbox

- **Size and Orientation:** This option allows you to change the certificate from "Portrait" to "Landscape" using "A4" or "Letter" sizes.

- **Add Text Button:** Create a box where you can enter text.
    - **Font Size:** Adjust the size of the text.
    - **Font:** Adjust the type of the font used in the textbox.
    - **Alignment:** Aligns the text with in the box area you draw.
    - **Style: Bold**, *Italic*, and *Underline* options.
    - **Font Color:** Adjust the color of the text.
    - **Background Color:** Adjust the background color of the textbox area.
- **Add Image Button:** To add images to canvas the certificate.
    - **View Original:** This opens the image in a separate tab/window so you can see the original size/image.
    - **Select:** Use to select the location and file of the image you want to insert.
    - **None:** Use this to remove all images from the image box.
- **Select Control** This is used to select a part of the **Certificates** you want to edit and if selecting the boxes on the designer it lets you know what is the current item selection. A drop-down list shows all the elements that make up your certificate.
- **Canvas Properties**
    - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
    - **Background Image**
        - **View Image:** It will open a new window showing the image of the certificate created.
        - **Change:** You can upload an image that resides on your computer. You can upload any normal image file type such as .JPG and .PNG. The recommended image size to upload is 1200×900 pixels at 300 DPI.
        - **None:** Removes any background image upload.

Use these keywords in any text box:

User Keywords

- **$FirstName$**, **$LastName$**, or **$FullName$:** Displays the name of the Attendee.
- **$Title$** & **$Company$:** Displays the Position and Company Name of the Attendee.
- **$PhoneNumber$**, **$Email$**, **$StreetAddress$**, **$City$**, **$State$**, & **$ZipCode$:** Displays additional information about the attendee.
- **$UserCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each attendee.
- **$Workshops$:** Displays a list of all workshops this attendee went to at this conference.
- **$Credits$:** Shows the total number of credits the Attendee received.

Conference Keywords

- **$Conference$:** Displays the name of the Conference.
- **$Date$:** Display the date the certificate was earned.

Selection Options

There are 4 options you can do when you have any of the above items (images, textboxes, etc.) selected.

1. **Move:** To do this click anywhere on the item. Once it has the focus click and drag it anywhere on the canvas.
2. **Resize:** To do this simply click and drag the gray arrow located on the bottom-right corner of the box. ***Note:*** *you cannot make the box larger than the canvas size.*
3. **Edit:** To do this double-click the textbox or table and this will allow you to change the text. ***Note:*** *Images do not have this option as they have this option in their properties. additionally there is not an image editor in this designer so this means you'll have to edit the image outside of the* ***Conference Tracker*** *website before uploading them.*
4. **Remove:** Simply click the red ball in the top-right corner of the box.

Finalize the design

Be sure to click the **Save** button at the bottom of the page when done editing or click the **From Templates** button to start over.

Print the Certificates

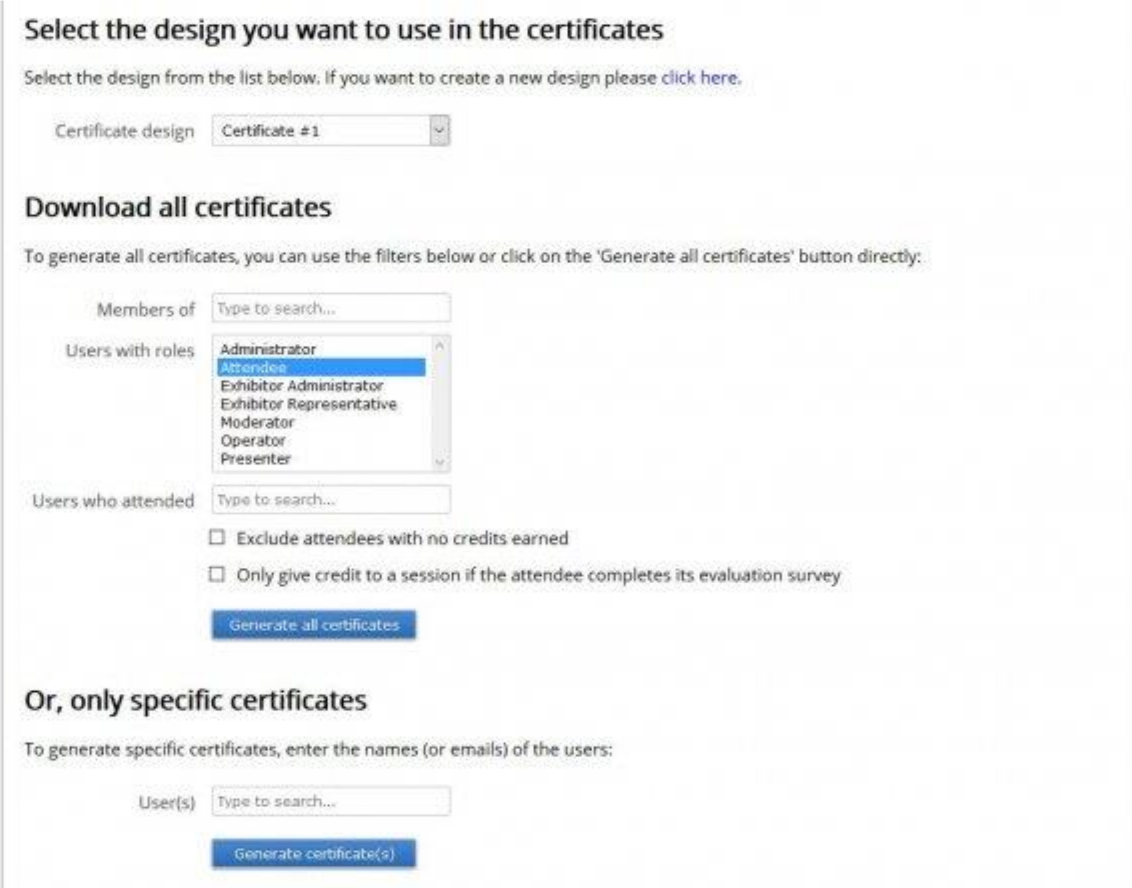
As an administrator, you may want to directly download the certificates to printout and handout to the Attendees. You can download it individually or all.

- Select the certificate design from your list of saved designs using the drop-down menu next to **Certificate Design**. This is the design that will be printed. You can also generate all certificates for a certain **Group** by searching for the group using the **Members of** text field. You can print by a specific role as well by selecting the role from the **Users with roles** box. Select multiple roles by holding **Ctrl** and clicking. You can send certificates to attendees in a certain session using the **Users who attended** field.

- Enable the **Exclude attendees with no credits earned** checkbox to only generate certificates for attendees who have earned credits. Enable the **Only give credit to a session if the attendee completes its evaluation survey** checkbox to only give credit to attendees who have completed the survey for a certain session through the **Attendee** app.

- To print all certificates click on Generate all Certificates under section Download all certificates and wait until the bottom section of the screen with the message Your certificates are ready, click on View Certificates to download.

- To print only a single certificate click on Generate Certificate under section Or, only one certificate and wait until the bottom section of the screen with the message Your certificates are ready, click on View Certificates to download.



Once the certificates have generated a link should appear to **View Certificates**.

E-mail Certificates

You can send certificates via email to multiple or a single Attendee.

- Select the certificate design from your list of saved designs using the drop-down menu next to **Certificate Design**. This is the design that will be emailed. You can also generate all certificates for a certain **Group** by searching for the group using the **Members of** text field. You can email by a specific role as well by selecting the role from the **Users with roles** box. Select multiple roles by holding **Ctrl** and clicking. You can send certificates to attendees in a certain session using the **Users who attended** field.

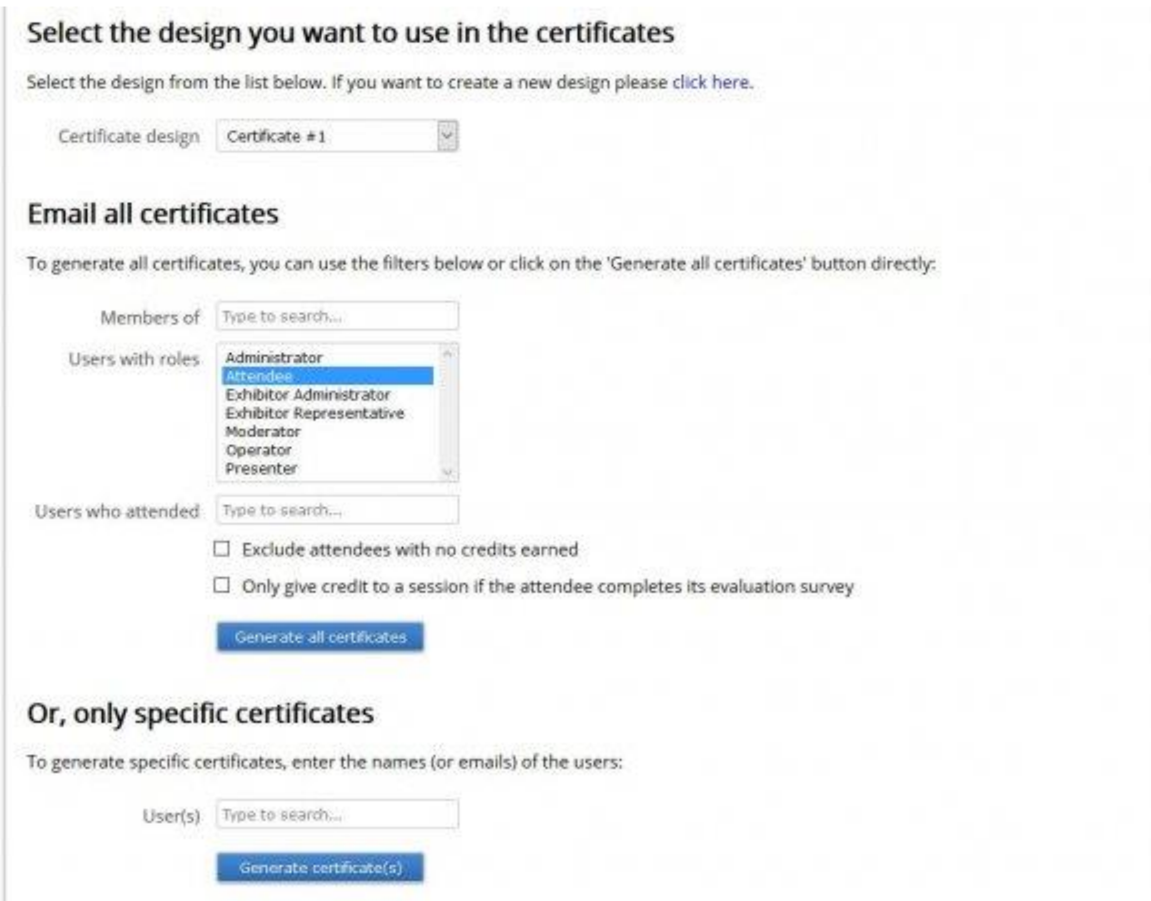
- Enable the **Exclude attendees with no credits earned** checkbox to only generate certificates for attendees who have earned credits. Enable the **Only give credit to a session if the attendee completes its evaluation survey** checkbox to only give credit to attendees who have completed the survey for a certain session through the **Attendee** app.

1. To e-mail all certificates, click on Generate all Certificates

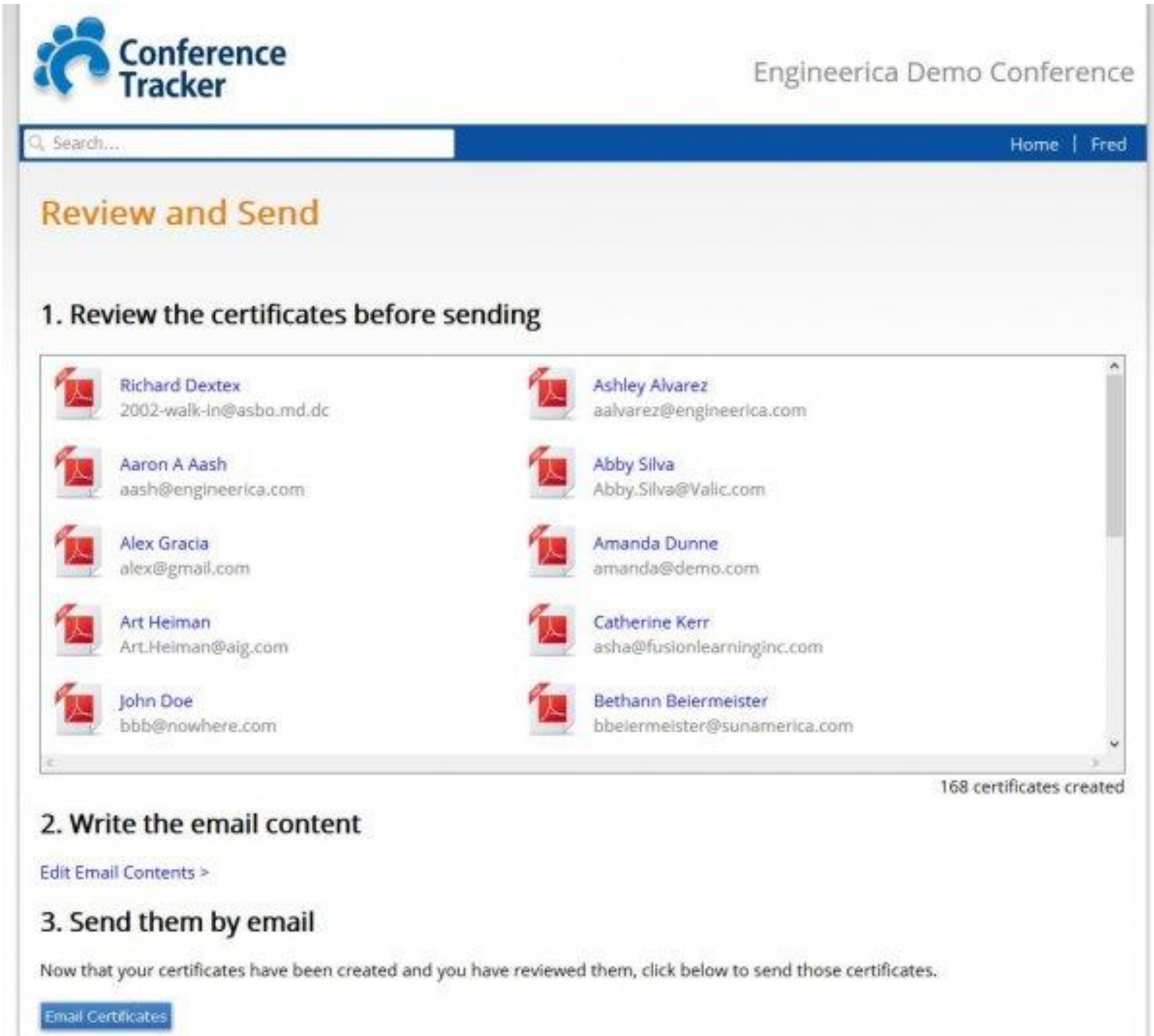
2. To send to a single Attendee must type the name of the person. Then click on Generate Certificate.

For both forms to send the certificates you need to follow the final steps where you can review the certificate and send.

- If you need to verify the information on the certificate being sent is accurate, click on the attendee's name displayed on the review section before sending the certificates.
- Click on Email Certificate to send the certificate in section Send them by email.



Once you have entered your attendee to e-mail the certificate the next screen looks like this.



Once you hit **Email Certificates** the certificates will go out as is, so please review them.

CEU Transcripts

This is where you can design, print, and/or even e-mail **CEU Transcripts** for the conference.

View / Edit

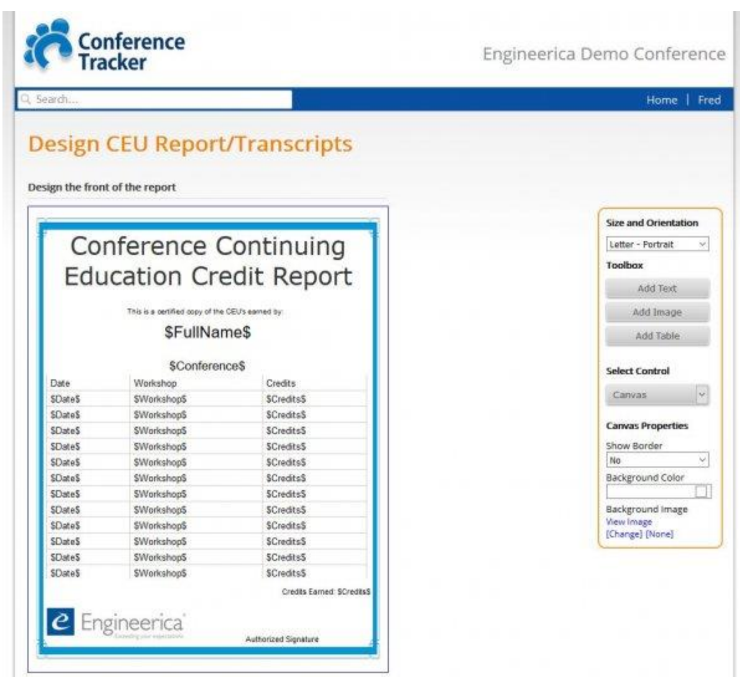
You'll be able to see all of the transcript designs you've created on this page. You can create as many transcript designs as you'd like. To design a new transcript, click on the blue **Create Transcript** button. You can give your transcript design a name and a short description. These options will appear on the right side of your transcript when you create one:

- **Design**: This will take you to the transcript designer for the transcript. If this is your first time designing a transcript, you will be taken to a templates page, where you can choose a template for your transcript.
- **Print**: This will take you to the printing page with the specific transcript design already selected.
- **Email**: This will take you to the email page with the specific transcript design already selected.
- **Delete**: This will remove the transcript from the list.

Design Your CEU Transcripts

How to Access: CEU Transcripts > **Design**

This is where you can fully customize your Attendees **CEU Transcripts** or just choose from several preset templates. If you don't like any of them simply click the **None** option at the bottom.



On this screen you can design the **CEU Transcripts** for your Attendees. Using the following sections:

Toolbox

- **Size and Orientation:** This option allows you to change the transcript from "Portrait" to "Landscape" using "A4" or "Letter" sizes.
- **Add Text Button:** Create a box where you can enter text.
    - **Font Size:** Adjust the size of the text.
    - **Font:** Adjust the type of the font used in the textbox.
    - **Alignment:** Aligns the text with in the box area you draw.
    - **Style: Bold**, *Italic*, and *Underline* options.
    - **Font Color:** Adjust the color of the text.
    - **Background Color:** Adjust the background color of the textbox area.

- **Add Image Button:** To add images to canvas the transcript.
    - **View Original:** This opens the image in a separate tab/window so you can see the original size/image.
    - **Select:** Use to select the location and file of the image you want to insert.
    - **None:** Use this to remove all images from the image box.
- **Add Table Button:** To add images to canvas the transcript.
    - **Font Size:** Adjust the size of the text.
    - **Font:** Adjust the type of the font used in the textbox.
    - **Alignment:** Aligns the text with in the box area you draw.
    - **Font Color:** Adjust the color of the text.
    - **Background Color:** Adjust the background color of the textbox area.
- **Select Control** This is used to select a part of the **CEU Transcripts** you want to edit and if selecting the boxes on the designer it lets you know what is the current item selection. A drop-down list shows all the elements that make up your transcript.
- **Canvas Properties**
    - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
    - **Background Image**

- **View Image:** It will open a new window showing the image of the transcript created.
- **Change:** You can upload an image that resides on your computer. You can upload any normal image file type such as .JPG and .PNG. The recommended image size to upload is 1200×900 pixels at 300 DPI.
- **None:** Removes any background image upload.

Use these keywords in any text box:

User Keywords

- **$FirstName$**, **$LastName$**, or **$FullName$:** Displays the name of the Attendee.
- **$Title$** & **$Company$:** Displays the Position and Company Name of the Attendee.
- **$PhoneNumber$**, **$Email$**, **$StreetAddress$**, **$City$**, **$State$**, & **$ZipCode$:** Displays additional information about the attendee.
- **$UserCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each attendee.
- **$Workshops$:** Displays a list of all workshops this attendee went to at this conference.
- **$Credits$:** Shows the total number of credits the Attendee received.

Conference Keywords

- **$Conference$:** Displays the name of the Conference.
- **$Date$:** Display the date the transcript was earned.

Use these keywords in the transcript table:

Transcript Keywords

- **$Date$:** Displays the date of the relative workshop that the credits were earned.
- **$Workshop$:** Displays the name of the relative workshop that the credits were earned.
- **$Credits$:** Shows the number of credits the Attendee received in relation to the workshop.
- **$SessionCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each workshop.

To edit what columns appear in the table simply double-click the table and edit them. The column definitions will look something like this:

Date = $Date$

CME Elligible = $SessionCustomField1$

Workshop = $Workshop$

Credits = $Credits$

Selection Options

There are 4 options you can do when you have any of the above items (images, textboxes, etc.) selected.

1. **Move:** To do this click anywhere on the item. Once it has the focus click and drag it anywhere on the canvas.
2. **Resize:** To do this simply click and drag the gray arrow located on the bottom-right corner of the box. ***Note:*** *you cannot make the box larger than the canvas size.*
3. **Edit:** To do this double-click the textbox or table and this will allow you to change the text. ***Note:*** *Images do not have this option as they have this option in their properties. additionally there is not an image editor in this designer so this means you'll have to edit the image outside of the* ***Conference Tracker*** *website before uploading them.*
4. **Remove:** Simply click the red ball in the top-right corner of the box.

Finalize the design

Be sure to click the **Save** button at the bottom of the page when done editing or click the **From Templates** button to start over.

Print the CEU Transcripts

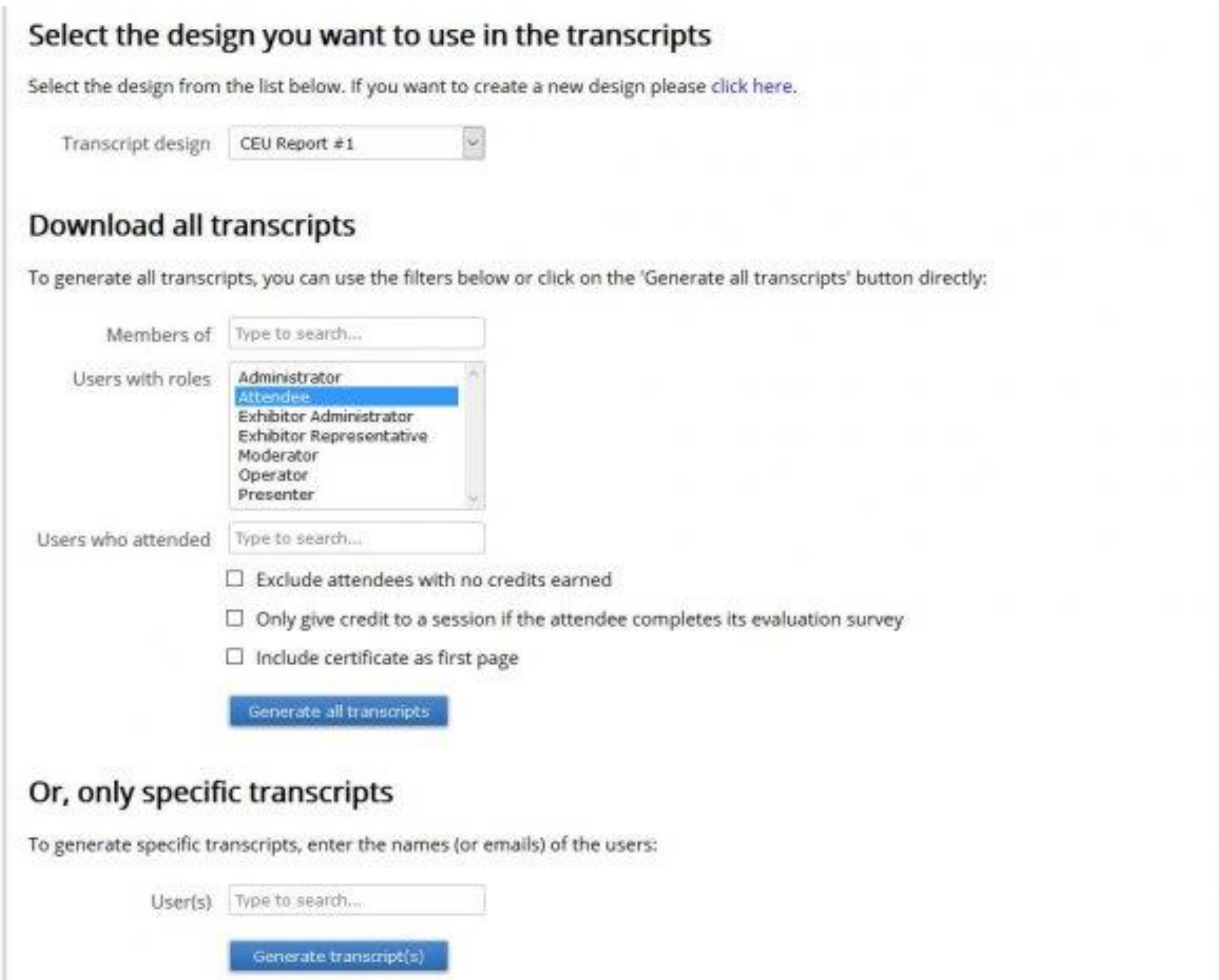
How to Access: CEU Transcripts > **Print**

As an administrator, you may want to directly download the **CEU Transcripts** to printout and handout to the Attendees. You can download it individually or all.

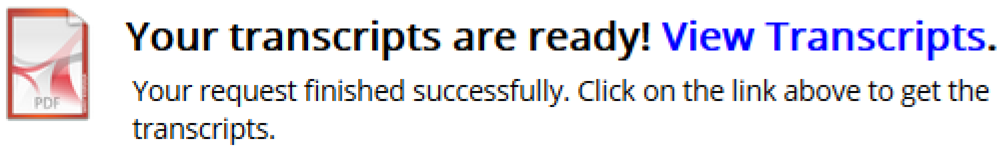
- To print all **CEU Transcripts** click on **Generate all Transcripts** under section **Download all Transcripts** and wait until the bottom section of the screen with the message Your **CEU Transcripts** are ready, click on **View Transcripts** to download.
    - **Options:**

- **Transcript Design**: Choose the design you want to print here.
- **Include certificate as first page:** This attaches a Certificate before each transcript in the printout.
- **Users who attended:** This allows you to specify a single workshop to print the transcripts on.
- **Exclude attendees with no credits earned:** This allows you to only get valid attendees who have attendance data.
- **Only give credit to a session if the attendee completes its evaluation survey:** This option will only give credits to the sessions in which the attendee has completed the evaluation survey using the **Attendee** app.

- To print only a single transcript enter the name of the attendee and click on **Generate Transcript** under section **Or, only one transcript**. Then wait until the bottom section of the screen with the message Your **Transcripts are ready**, click on **View Transcripts** to download.



Once the **CEU Transcripts** have generated a link should appear to **View Transcripts**.



E-mail CEU Transcripts

How to Access: CEU Transcripts > **Email**

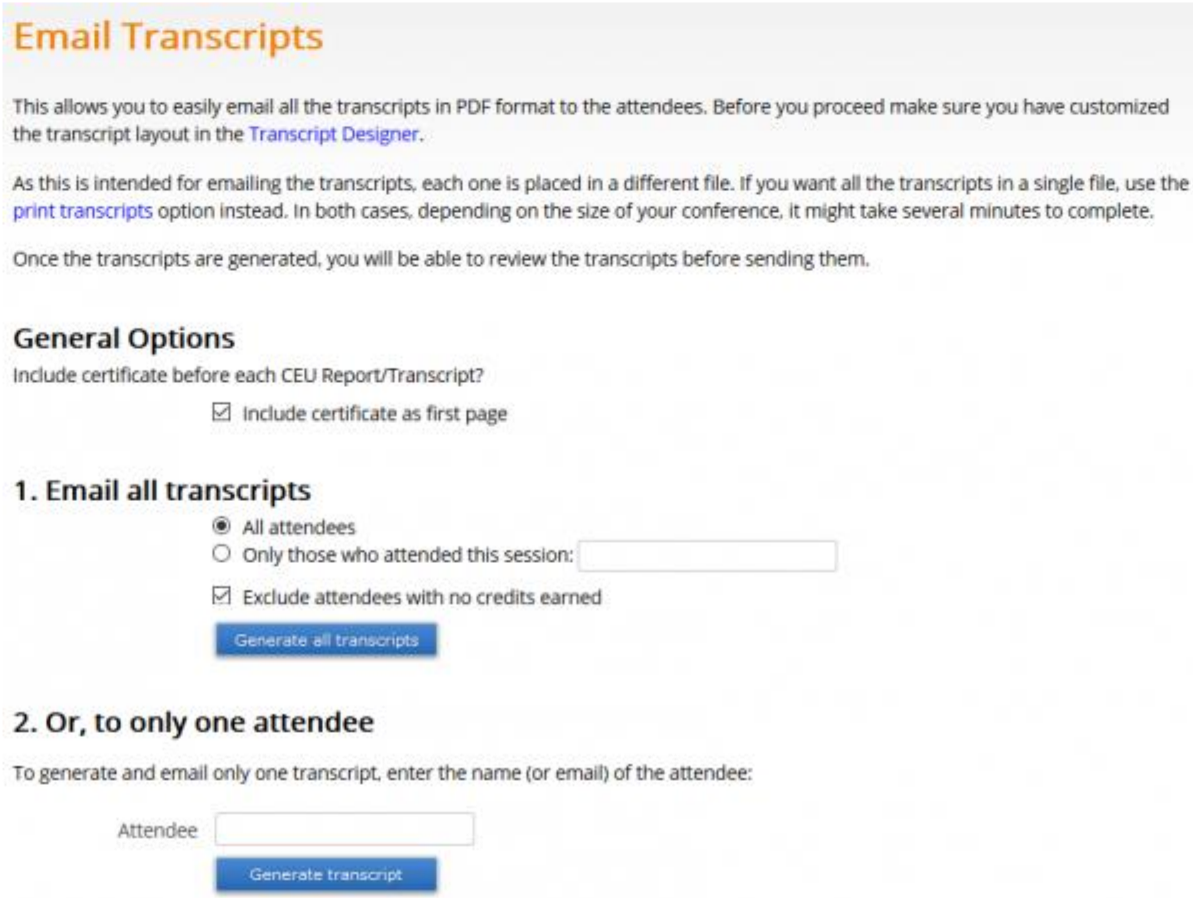
You can send **CEU Transcripts** via email to multiple or a single Attendee.

1. To e-mail all **CEU Transcripts** , click on **Generate all CEU Transcripts**
2. To send to a single Attendee must type the name of the person. Then click on Generate Transcript.

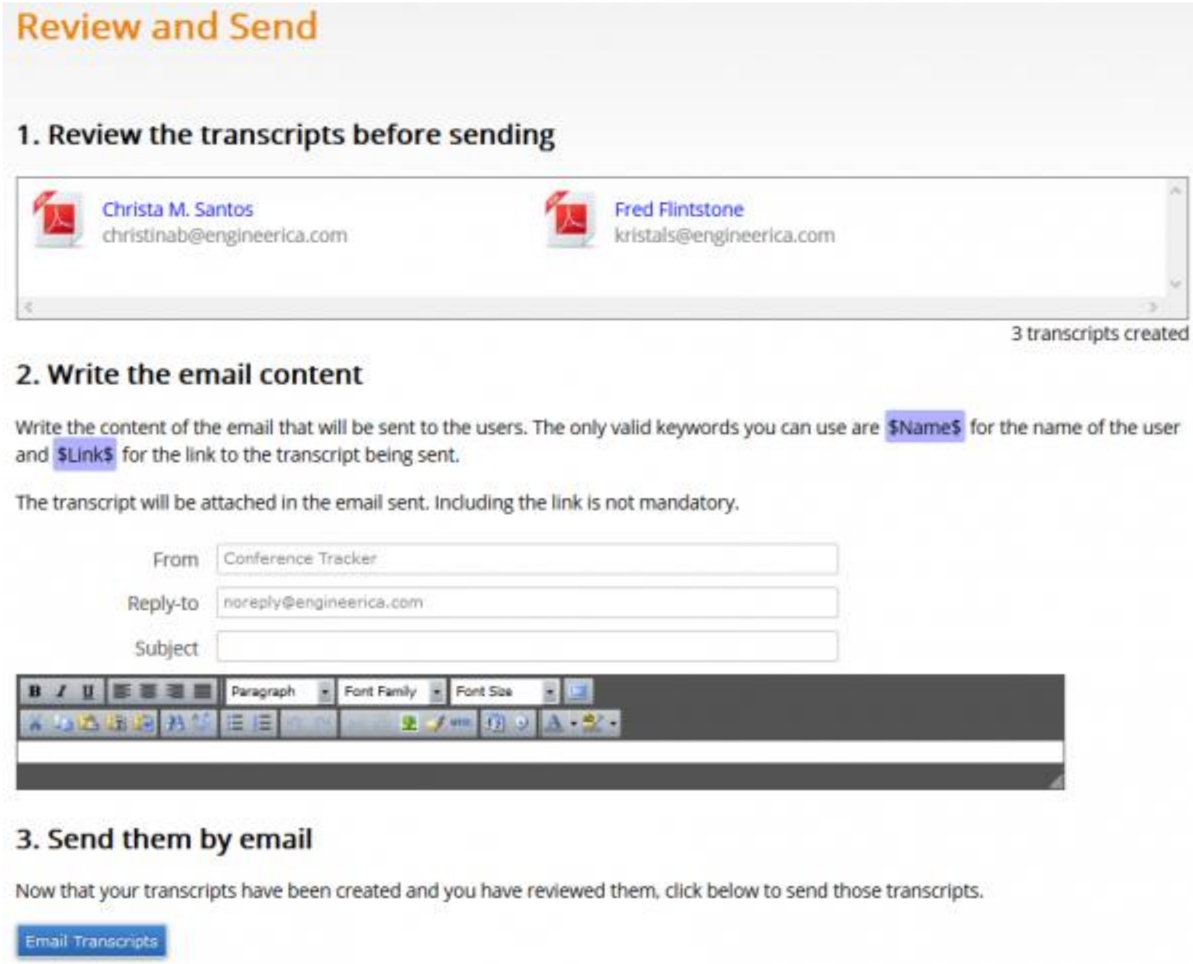
- **Options**
  - **Transcript Design**: Choose the design you want to print here.
  - **Include certificate as first page:** This attaches a Certificate before each transcript in the email.
  - **Users who attended:** This allows you to specify a single workshop to email the transcripts on.
  - **Exclude attendees with no credits earned:** This allows you to only get valid attendees who have attendance data.
  - **Only give credit to a session if the attendee completes its evaluation survey:** This option will only give credits to the sessions in which the attendee has completed the evaluation survey using the **Attendee** app.

For both forms to send the **CEU Transcripts** you need to follow the final steps where you can review the transcript and send.

- If you need to verify the information on the transcript being sent is accurate, click on the attendee's name displayed on the review section before sending the **CEU Transcripts** .
- Click on **Email Transcript** to send the transcript in section Send them by email.



Once you have entered your attendee to e-mail the transcript the next screen looks like this.



Once you hit **Email CEU Transcripts** the **CEU Transcripts** will go out as is, so please review them.

Advanced Options

This section describes the available options in **Conference Tracker**. To change the **Conference Tracker** options, you need to click the **Settings**, below the **Advanced Options** section from the home page. After changing the options you want, click **Save** button to apply the changes to your conference.

Import Data

This is where you go to import your data for the conference. At this point once you have the rooms entered in the **Conference Tracker** system you are ready to either import your **Attendees** or **Workshops/sessions**.

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

File Format

Only **Comma-Separated-Values (CSV)** files are supported for **Conference Tracker** imports. This format is broadly supported by many application 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.

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:

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**

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

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 manage 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:

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**

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."

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:

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**

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

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:

Required:

- **Name**, **StartTime**, **EndTime**, **Room**

Optional:

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

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

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

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:

- **Description**

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.

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:

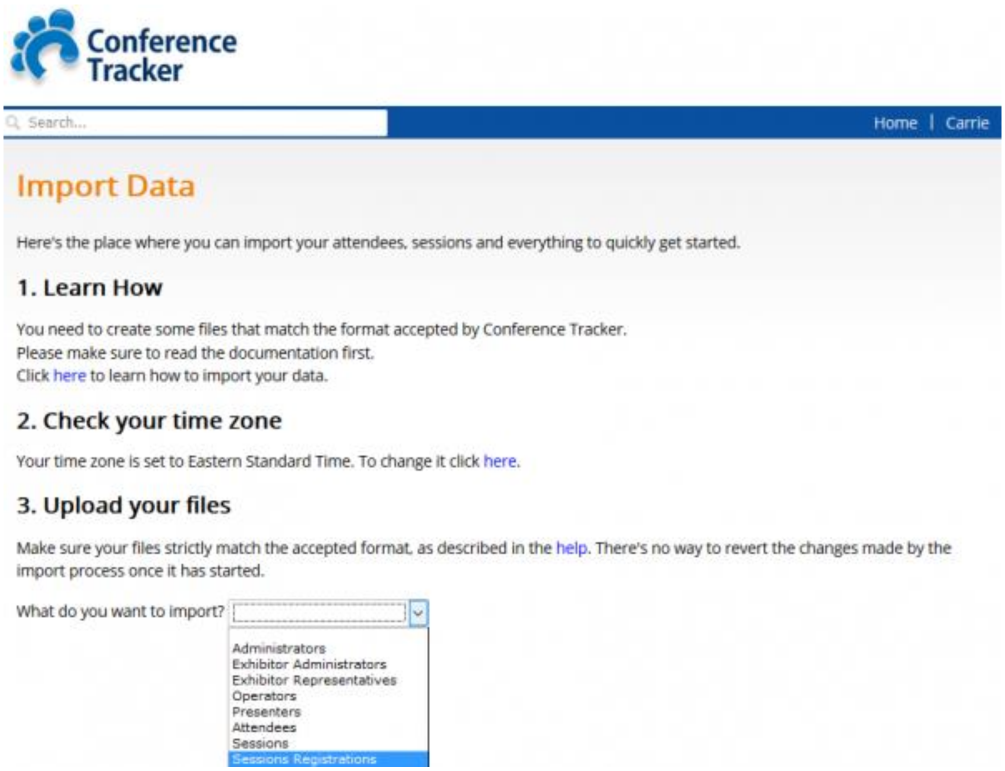
Required:

- **GroupName**, **Email**

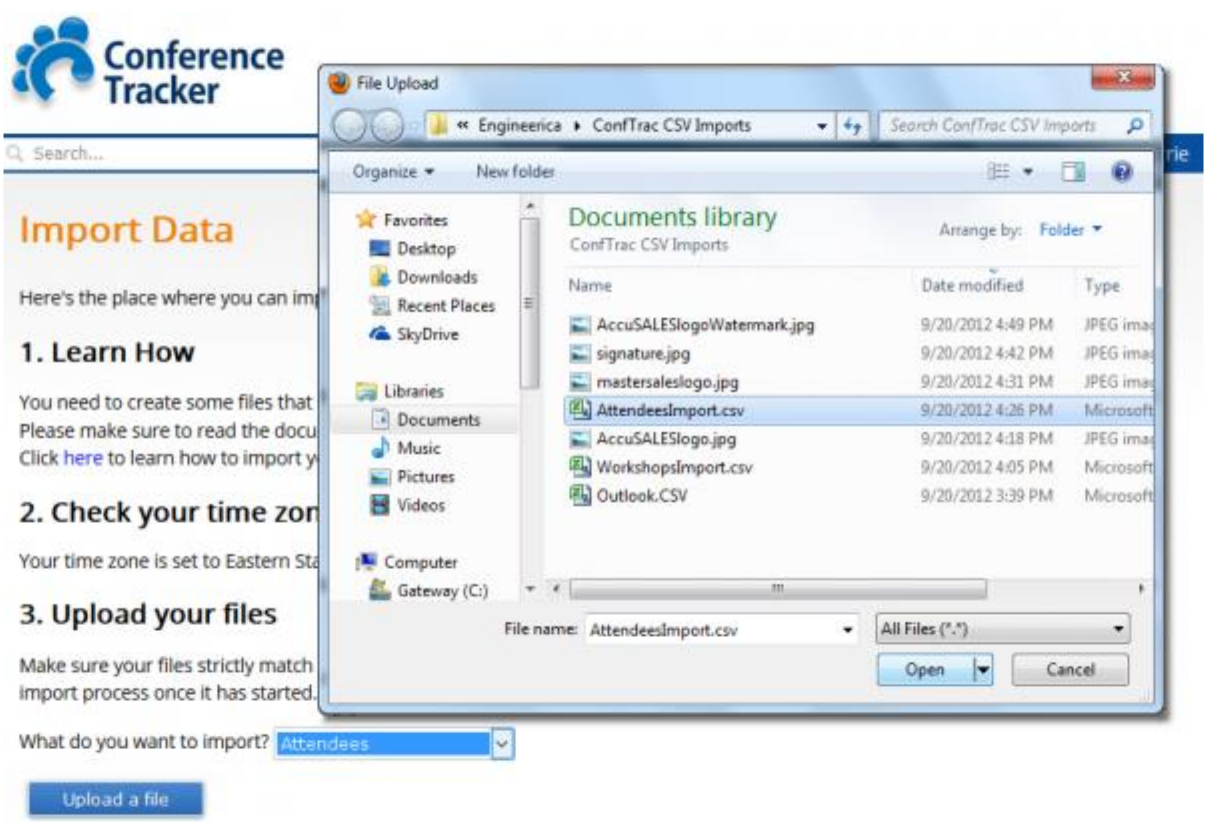
GroupName	Email
Users with financial aid	wpooh@contrac.com
Users with financial aid	roger.rabbit@conftrac.com
Users with disabilities	duck@conftrac.com
Users with disabilities	homerjs@conftrac.com

Importing your CSV Files

Once you've got the CSV files prepared and ready, let's move on to uploading your files. To get here just click on the **Import Sessions** button from the **Conference Sessions** screen.



To import the CSV files you created you just have to select the import type in the dropdown and then click the **upload a file** button.



Browse your PC to find the CSV files and click open to upload and done!

Import file Merged List July Seminar 2014.csv

4:04 pm - Queueing background job. - OK
4:05 pm - Uploading the data to the server... - OK
4:05 pm - Verifying the uploaded data... - OK
4:05 pm - Merging the data with the existent one... - OK
4:05 pm - Updating search results... - OK
4:05 pm - Updating global statistics... - OK
4:05 pm - Cleaning up... - OK
4:05 pm - All done. It finished successfully. - OK
Ended at 4:05 pm

A confirmation or error message will appear at the bottom of the screen (pictured above).

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)
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

Export Data

Tracking Conference has the ability to save your information to all the following file types:

1. **CSV**

2. **HTML**

3. **Excel Spreadsheet**

To export click the Download link on the corresponding column for the file format you want and wait until it says your data is ready. Once the export generates click the View **Report link** which will let you download the file type chosen to your computer.

Conference Tracker will allow you to download the conference information for any of the sections you want:

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:

- FirstName
- MiddleName
- LastName
- Email
- PhoneNumber
- StreetAddress
- City
- State
- ZipCode

- Title
- Company
- CustomField1
- CustomField2
- CustomField3
- CustomField4
- CustomField5
- Card

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 or onsite (using the online registration form) then it will include the completed online registration form information. Here is the information included in this export:

- FirstName
- MiddleName
- LastName
- Email
- PhoneNumber
- StreetAddress
- City
- State
- ZipCode
- Title
- Company
- CustomField1, CustomField2, CustomField3, CustomField4, CustomField5
- Card
- RegistrationField1, RegistrationField2, RegistrationField3, etc. based on how many questions/fields created on the Attendee Online Registration Form.

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:

- FirstName
- MiddleInitial
- LastName
- 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:

- FirstName
- MiddleInitial
- LastName
- 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
- FirstName
- MiddleInitial
- LastName
- 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
- FirstName
- MiddleInitial
- LastName
- 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:

- CardNumber
- FirstName
- MiddleName
- LastName
- Email
- PhoneNumber
- StreetAddress
- City
- State
- ZipCode
- 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:

- Name
- StartTime
- EndTime
- Credits
- Speakers
- Room
- RequiresSignOut
- RequiredPresencePctg
- 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
- ExhibitorFirstName
- ExhibitorMiddleName
- ExhibitorLastName
- FirstName
- MiddleName
- LastName
- Email
- PhoneNumber
- StreetAddress
- City
- State
- ZipCode
- Title
- Company
- Notes
- CustomLeadsQuestion1, CustomLeadsQuestion2, CustomLeadsQuestion3, etc. for each Leads Custom Questions created by each Company's Exhibitor Administrators.

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
- CardNumber
- Room
- Workshop
- FirstName

- MiddleName
- LastName
- 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
- TotalMinutes
- FirstName
- MiddleName
- LastName
- E-mail
- PhoneNumber
- StreetAddress
- City
- State
- ZipCode
- Title
- Company
- Card
- Credits
- UserField1, UserField2, UserField3, UserField4, UserField5
- WorkshopField1, * WorkshopField2, * WorkshopField3, * WorkshopField4, WorkshopField5

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 the times the attendee swiped in and out of each **Workshop/Session**. Here is the information included in this export:

- Workshop
- Room
- Status
- TotalMinutes
- FirstName
- MiddleName
- LastName
- E-mail
- Card
- 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:

- FirstName
- MiddleName
- LastName
- 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:

- FirstNamve
- MiddleName
- LastName
- Notes
- Name
- DeliveredOn

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
- RegistrationField1, RegistrationField2, RegistrationField3, etc. based on how many questions/fields created on the Attendee Online Registration Form.

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**.

- Workshop
- StartTime
- EndTime
- Credits
- Speakers

- Room
- FirstName
- MiddleName
- LastName
- Email
- PhoneNumber
- StreetAddress
- City
- State
- ZipCode
- 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:

- Name
- StartTime
- EndTime
- 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:

- Name
- StartTime
- EndTime
- 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
- 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.

Companies

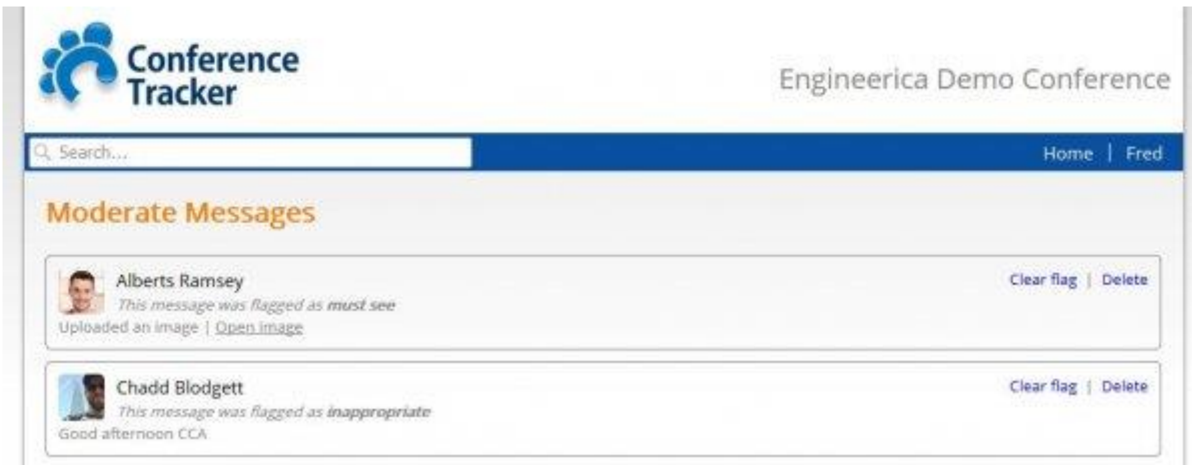
This is where you can see all the **Companies** information that are exhibiting at your conference.

Moderate Messages

This section allows you to see messages that have been flagged for review through the **Attendee** app. Users can flag posts made on the **Attendee** app as **Must See** or **Inappropriate**. When flagged, the posts will appear in this list.

You'll be able to see the name of the attendee who made the post, as well as the contents of the post. You'll also be able to see whether it was flagged as **Inappropriate, Must See, or both**. If it is a video or image post, you can select **View Image/Video** to see the media. You have two options for managing these posts:

- **Clear Flag**: This option clears the flag. This removes the comment from the **Moderate Messages** list and will remain available to view on the **Attendee** app.
- **Delete**: This option will delete the post from the **Attendee** app.



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.

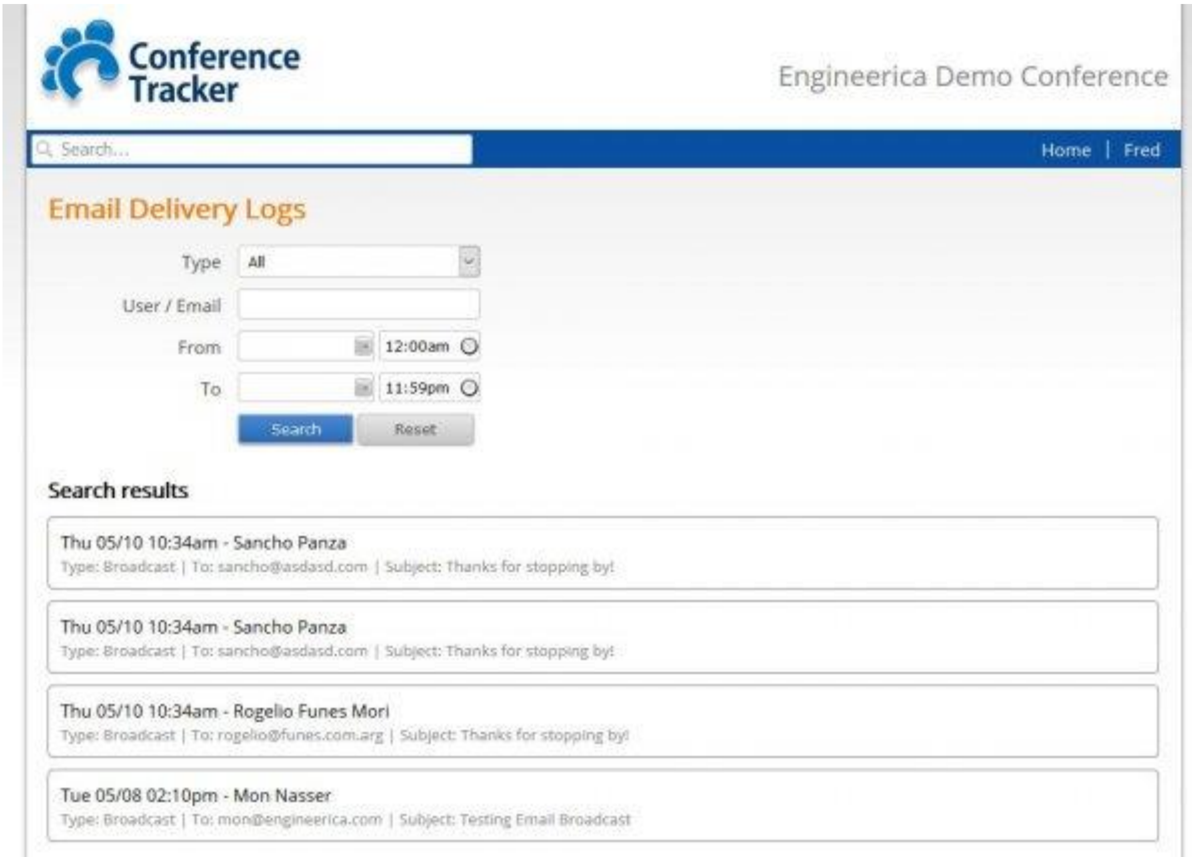
You can create a new coupon by clicking on **Create Coupon**. You will have these options for creating a new coupon:

- **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 with any other coupons you create.

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.

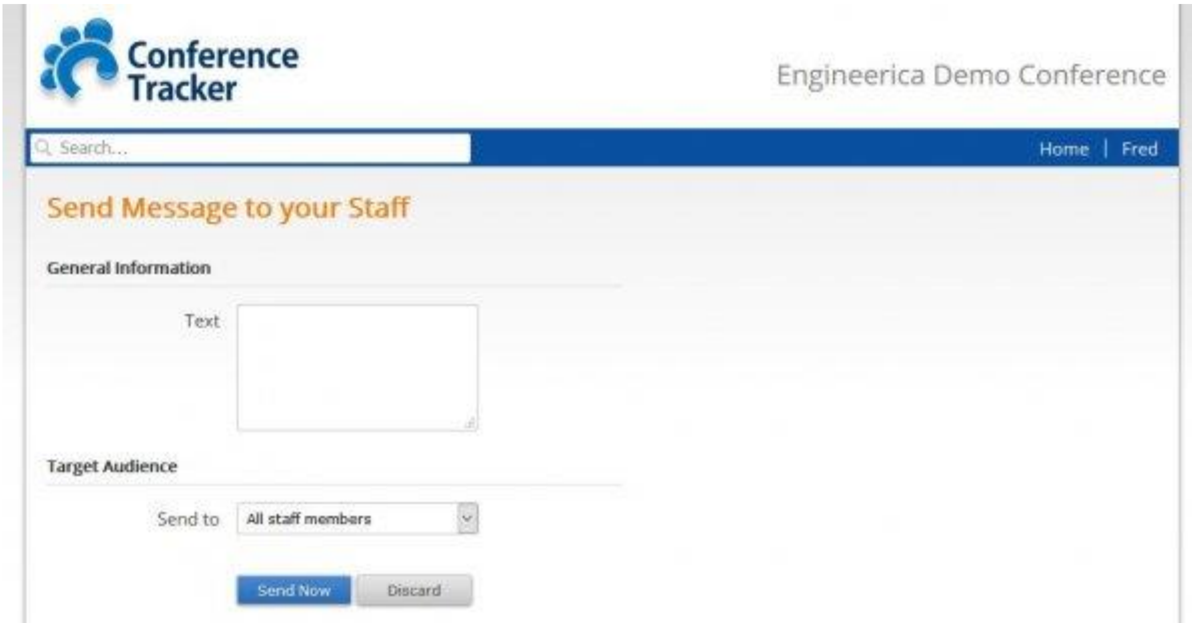


You are able to filter the logs using these options:

- **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

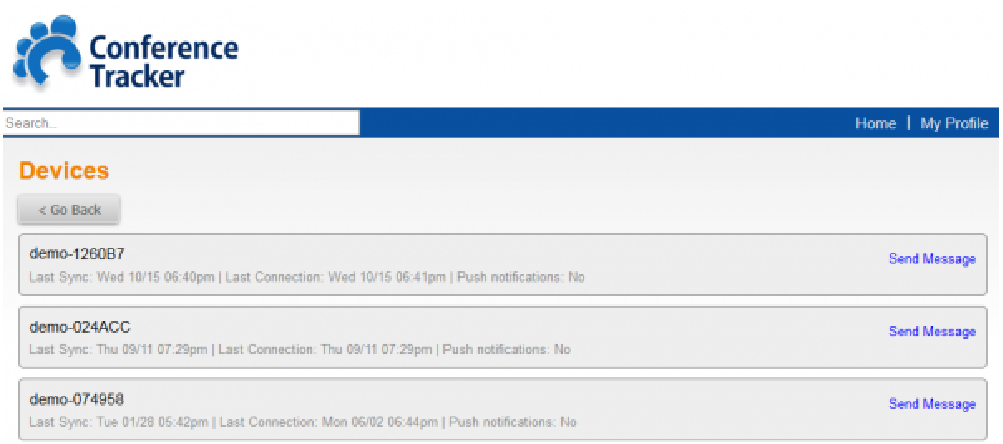
This is where you can send messages directly to your staff members. Any users with the **Operator** role or **Administrator** role and has logged into the **Conference Tracker** app will receive the message sent from this feature.



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.

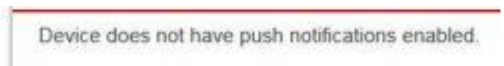
Device Messaging

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:



Enable Push Notifications

Push notifications require an active Wi-Fi or cellular connection. If you're not getting notifications for a specific app, try these steps:

1. Go to **Settings** > **Notifications** to verify that the Conference Tracker app is showing up in the push notifications. If notifications do not appear in the Notification Center, make sure that the Notification Center setting for the app is enabled.

2. Make sure you're signed in to your Apple ID.

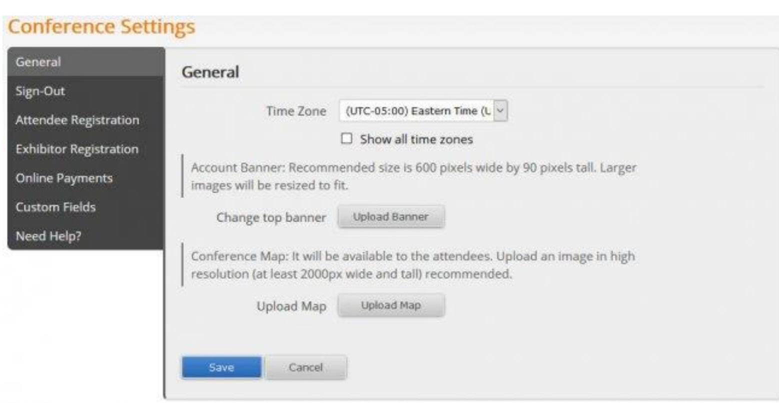
3. If you've recently installed an app or restored a backup, open the app to start getting notifications.

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.

Upload banner: This allows you to change the banner on the top of the **Online Registration Form** and at the top of the pages of your **Conference Tracker** account.

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.**

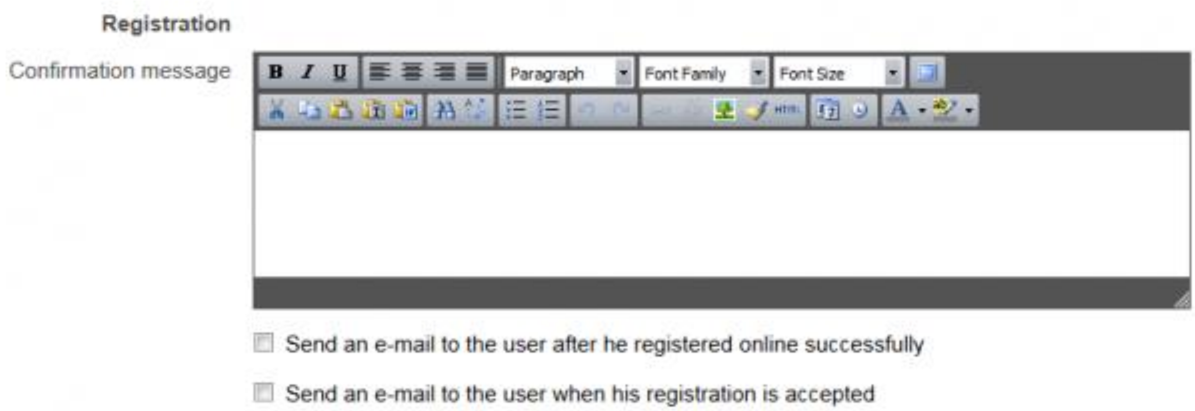
Early Bird valid thru: Set the date for the **Base Reg. Fee - Early Bird** to be valid for.

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**.

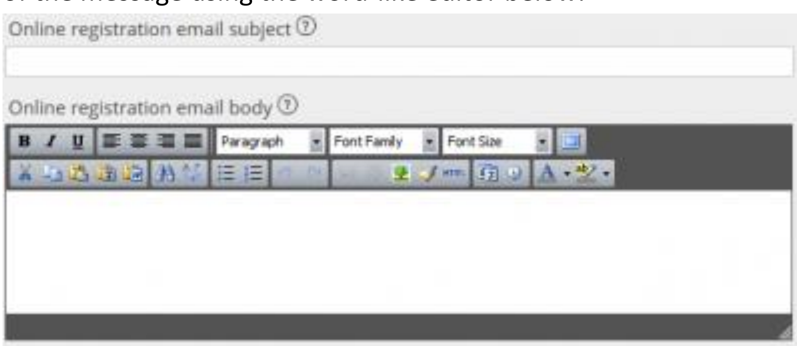
Confirmation Message: This is a brief message that you can complete using the word-like tools to confirm the users registration to the conference.



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).

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.

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.

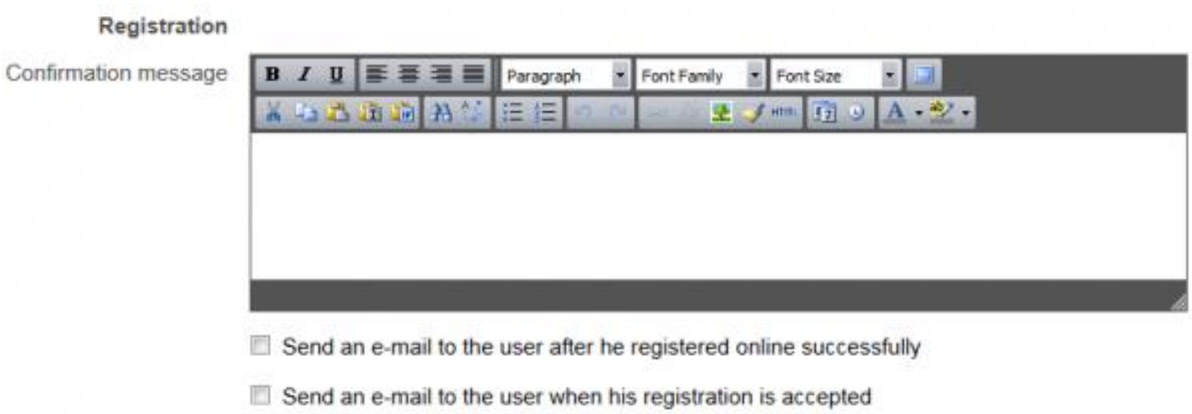
Additional Rep fee: This is the fee charged for registering additional reps.

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.

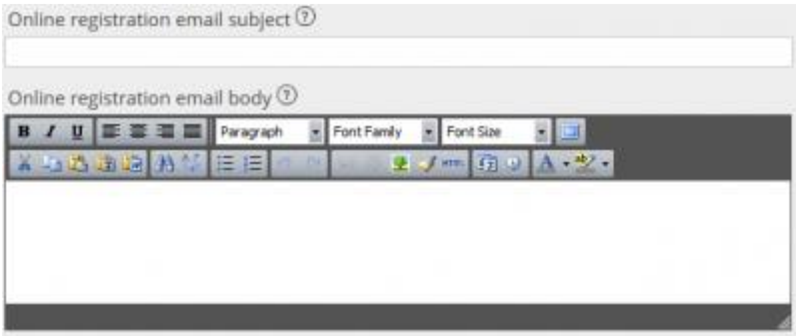


Sending Options:

- 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).

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.

Online Payments

How to Access: Advanced Options > **Settings** > **Online 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.

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.

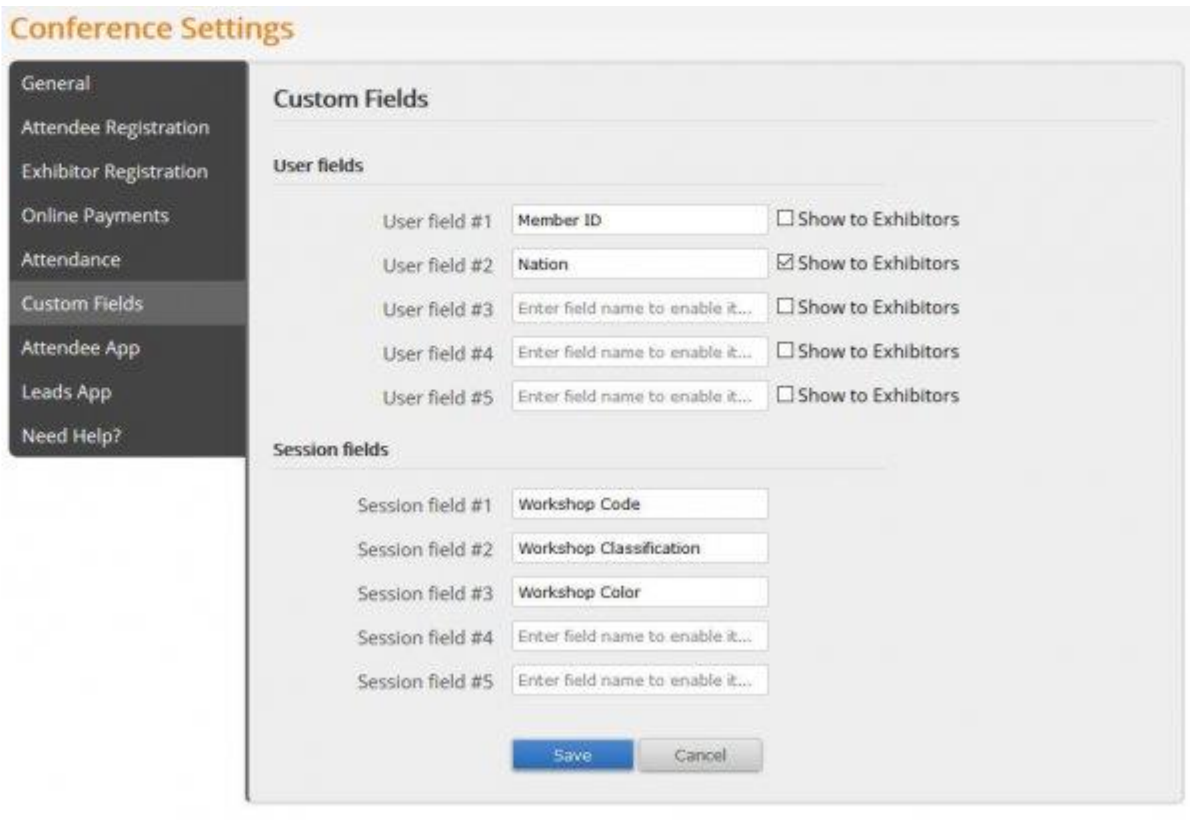
Custom Fields

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** 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.

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.