

Registration Groups in Certain

This document is a guide to using the Registration Groups sub-module in Certain. This advanced feature of the Certain platform is not enabled in an account by default, but if you're interested in it after reading this document, please email features@certain.com, including your account name.

The functionality in this sub-module is available to users with a user type of Registration Support or higher, except that groups can only be *added* by an Event Builder or an Administrator.

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Using Groups in Your Event

What are “Groups” in Certain?

- They’re a way of combining sets of registrations for management and reporting purposes.
- You can have as many groups as you like.
- A registrant can be assigned to just one group.
- A registrant must have an attendee type before they can be assigned to a group.
- A group of registrants often needs to share a set of common travel schedules and activities. "Hosted buyers", for example, are registrants requiring specific processes and care at an event, so may need to be managed in groups.

Why Would I Use Groups in my Event?

- To ease the management of registrants attending an event as a group.
- For example, you are running a trade show, and various hotel chains are sending representatives from each hotel as hosted buyers. You could have a group for each chain, or one for each country.
- From the provider/host perspective, it is important for event providers to track performance indicators with regard to these groups. For example, track the number of actual registrations vs. the expected number per group.

About Setting Up and Using Groups

The steps involved in setting up and using groups in Certain are explained in some detail in the rest of this document, but here is a brief summary.

Switching the feature on in the event

- Enable the Registrations Group sub-module in [Plan > Configure > Options](#). (See page 3.)

Setting Up the Groups

- If required, set up Group Custom Fields to extend the information held about each group.
- Add named groups: see “Setting up Groups” on page 3.
- Each group is restricted to one or more specified attendee types.
- (More than one group can be restricted to the same attendee type(s).)
- You can set the “target” number of registrants in each group, and inventory limits.
- Agenda items and session occurrence can be assigned to group members automatically.
- You can specify Appointment Rotations, Event Airports and Transportation Preferences for a group, limiting the choices available to its members.

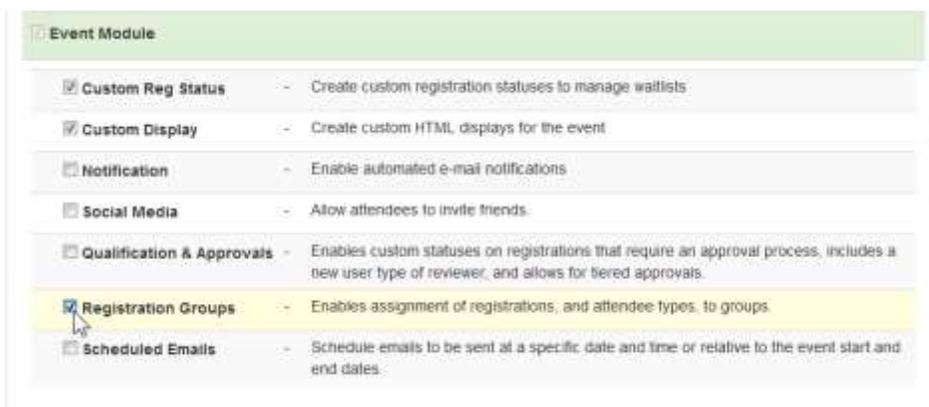
Using the Groups

- You can assign registrants to just one group (or to no group):
 - Via a registration form,
 - where the registrant selects their group from a list (see page 7), or
 - where the registrant enters the group code you have sent them, or
 - using form logic, where you can customize the list from which the registrant chooses, or have the form determine the group assignment (page 9).
 - Manually on the admin side,
 - in bulk, selecting multiple registrants on one page (see page 10),

- or individually in a registrant's registration record (page 11).
- You can track the estimated and actual numbers of registrants in each group.
- Group members can be assigned as coordinators, to ease communication.
- Group information is available in reports, email templates, and forms

Enabling the Registration Groups Sub-Module

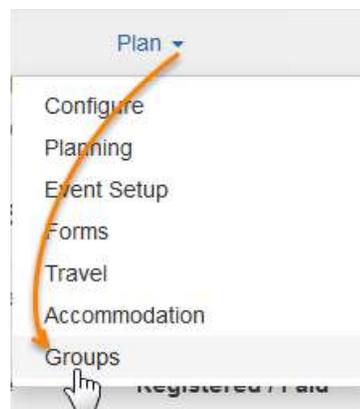
In the event, go to [Plan > Configure > Options](#), and select **Registration Groups** under **Event Module** in **Functional Areas Needed by This Event**.



The **Plan** menu link on the Top Navigation Bar in the event will now include a link to the **Groups** page, as described below. That is where you set up the groups.

Setting up Groups

As an Event Builder, in the event, go to [Plan > Groups](#).



The **Group List** page lists any groups that have already been added.

been

Documentation / Event List / Event Dashboard / Groups / Group List Import Groups

Groups

- Group List
- Custom Fields
- Assign Groups
- Reports

Group List

Group List Add New

--- All Users ---

Group Name	Group Code	Associated User	Actions
Mythical Hotels	MYTH	Mary Smith	  
Western Delegation	West		  

First Previous 1 Next Last

Custom Fields for Groups

You can add one or more custom fields for groups. These enable you to store additional information about groups, and are displayed on the Group Summary report (which is described on page 12).

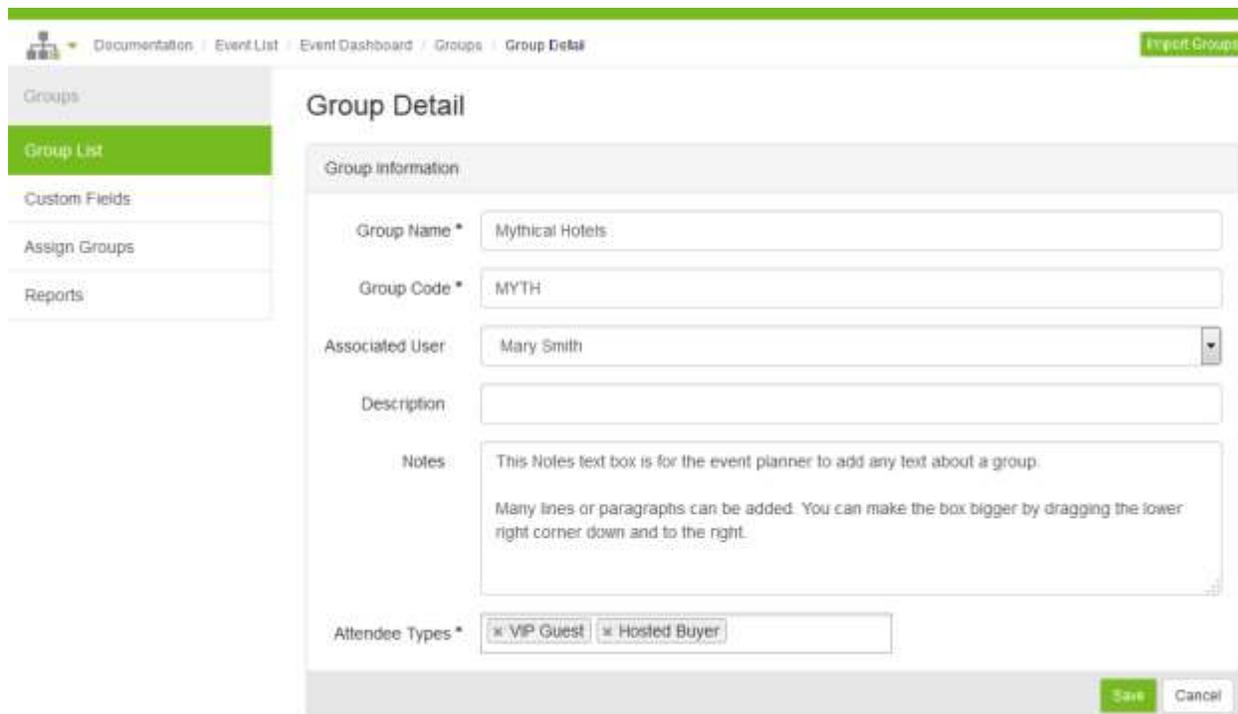
To add custom fields, go to [Plan > Groups > Custom Fields](#), type a name for the first one, and click **Add**. Then repeat for any additional custom fields.

You can set values for these fields when you are adding or editing a group, as explained next.

Adding a Group

Click **Add New** to add a group, or  to edit one.

As illustrated in the screenshot overleaf, follow the steps below to set up your new group.



Documentation / Event List / Event Dashboard / Groups / Group Detail Export Groups

Groups

Group List

Custom Fields

Assign Groups

Reports

Group Detail

Group Information

Group Name * Mythical Hotels

Group Code * MYTH

Associated User: Mary Smith

Description

Notes: This Notes text box is for the event planner to add any text about a group. Many lines or paragraphs can be added. You can make the box bigger by dragging the lower right corner down and to the right.

Attendee Types * VIP Guest Hosted Buyer

Save Cancel

1. Give the group a **Name**, and a unique **Code**.
2. Select an **Associated User**, if required. When a user associated with any groups goes to the Groups page, by default they see only those groups. This enables “account managers”, for example, to see just the groups for which they are responsible. (They can, however, still choose to see all groups.)
3. Optionally, add a **Description** of the group, and/or any **Notes** about it.
4. Select one or more **Attendee Types** to which this group is restricted. Our “Mythical Hotels” example is for VIP Guests and Hosted Buyers.
5. **Save** the group. This adds further sections to the page, where you can edit further information, as illustrated and discussed overleaf.

Attendee Types ▲

Attendee Type	Target Number	Inventory	Actual Number
Hosted Buyer	<input type="text" value="0"/> (0)	<input type="text" value="0"/> (0)	0 (0)
VIP Guest	<input type="text" value="0"/> (0)	<input type="text" value="0"/> (0)	0 (0)

Agenda Items ▲

Agenda Items

-- Search for Agenda Items --

Transportation Preferences ▲

Airport Preferences:

-- Search for Airports --

Transportation Type Preferences

-- Search for Transportation Types --

Sub-Groups

Name	Code	Description	Actions

Custom Fields ▲

No custom fields added. Click on "Custom Fields" sub-tab on left navigation menu to add custom fields.

Attendee Types

6. If required, specify the **Target Number** of registrants in that group for each of its Attendee Types. An **Actual Number** is displayed: the current number of registrants in this group who are of the selected attendee type. If you are adding a new group, rather than editing an existing one, then of course this will be zero so far, as in the screenshot above.
7. If required, specify an **Inventory** figure for each attendee type: the maximum number of attendees in this group who can be of that type.

Note: This Inventory (if entered) is used to limit assignment to the group on a registration form (see page 7). If the membership of the group has already reached its Inventory level, then an attendee selecting that group sees a warning message, and is prompted to contact their group coordinator for the next steps.

The Inventory limit is *only* used in forms; an event planner can still assign attendees to the group manually, even if the group has reached (or exceeded) its set Inventory.

Agenda Items

8. You can select any agenda items that have unlimited inventory, for them to be assigned automatically to any attendee who registers as a member of the group (via a registration form). These agenda items may have fees, including fixed fee and percentage discounts, making it possible to use a group as a "promo code", to apply discounts automatically.

Session Occurrences

9. If the Speaker and Session Management Module is enabled for the event, you can select any session occurrences to be assigned automatically to any attendee who registers as a member of the group.

Rotations

10. If the Appointment Rotations sub-module (of the Appointments Module) is enabled for the event, then you can select the rotations to be available to registrants in the Group Rotations section of the registration form, based upon their group.

Custom Fields

11. If you have set up group custom fields (see 4), you can assign values for up to **ten** of them here for each group.

Assigning Group Membership

You can assign a registrant to one group. As mentioned in the introduction, that can be done in four ways:

- On registration forms:
 - enabling the registrant to select their group, or
 - assigning a group to the registrant.
- Manually on the admin side:
 - in bulk, selecting multiple registrants on one page, or
 - individually, in a registrant's registration record.

Letting Registrants *Select Their Group*

On a registration form, you can allow registrants to select a group from a list or by entering their group code (which you have supplied by email, for example).

To enable this, add a Groups section to the form (in [Plan > Forms](#)).

Note: The groups available on the form for the registrant will be restricted to those that are for that registrant's attendee type, so the Groups section needs to be *after* the attendee type has been selected or assigned.

Select one of these two check boxes:

- **Display select field containing all groups available to attendee type** – The attendee must select the group from a list of the group codes available to their attendee type.

- **Display input field for group code** – The attendee must enter the group code as a precise match to the one you have sent them.

You can choose to make the **Group Code** a required field, and can customize its label. You can also customize error messages the attendee might see, such as if they enter an invalid code.

The following field is applicable whichever of those two options you select:

Validate against total group inventory – If selected, then the check for whether the group's capacity has been reached, i.e. whether the attendee can be assigned to the selected group, includes the inventory for **all** the attendee types in the group, not just the one for the attendee's **own** attendee type.

Example:

In Group A:

- Attendee Type **X**: Inventory = 1. Actual number assigned = 1. (That is, capacity reached.)
- Attendee Type **Y**: Inventory = 5. Actual number assigned = 5. (That is, capacity reached.)
- Attendee Type **Z**: Inventory = 5. Actual number assigned = 3. (That is, capacity of 2 remaining.)

If an attendee of Attendee Type **Z** selects Group A, they will be assigned because capacity has not been reached.

But if Attendee Type **X** or **Y** selects Group A, then whether they will be assigned depends on whether the **Validate against total group inventory** option is selected or not:

Not selected: Attendee **will not** be assigned, because the capacity for their attendee type has not been reached.

Selected: Attendee **will** be assigned, because the capacities across **all** the attendee types in that group are included, and there are still two places left for attendee type **Z**.

Using Form Logic

You can also use Form Logic to achieve this, in which case you set conditions (as usual for logic). For example, limiting groups to certain countries of origin.

In the event, go to [Plan > Forms](#), select (or add) the form, and click the **Logic** page link.

Add a new rule, and select the Display Action: "**Display Groups**".

List Rule Details

* Name

Section Processing Order

Select Action

-> Display input field for group code.
 Display select field containing all groups available to attendee type.

Choose how the attendee will select their group:

1. by typing their group code (which you have supplied by email, for example), or
2. by selecting it from a list (of all those available to their attendee type).

(The groups available on the form for the registrant will be restricted to those that are for that registrant's attendee type, so the logic action needs to occur after the attendee type has been selected or assigned.)

Set up conditions in the rule, as necessary.

Assigning Groups on the Registration form

Instead of letting registrants choose their own group, you can assign a group to them, using Form Logic.

In the event, go to [Plan > Forms](#), select (or add) the form, and click the **Logic** page link. Add a new rule, and select the action, “**Assign Group**”. Then select the group to be assigned.

List Rule Details

* Name

Section Processing Order

Select Action

->

Using Groups in Conditions in Form Logic

Note also that it is possible to use a Group in the *conditions* of a form logic rule. That might be appropriate if, for example, you have pre-assigned groups when sending out invitations to register.

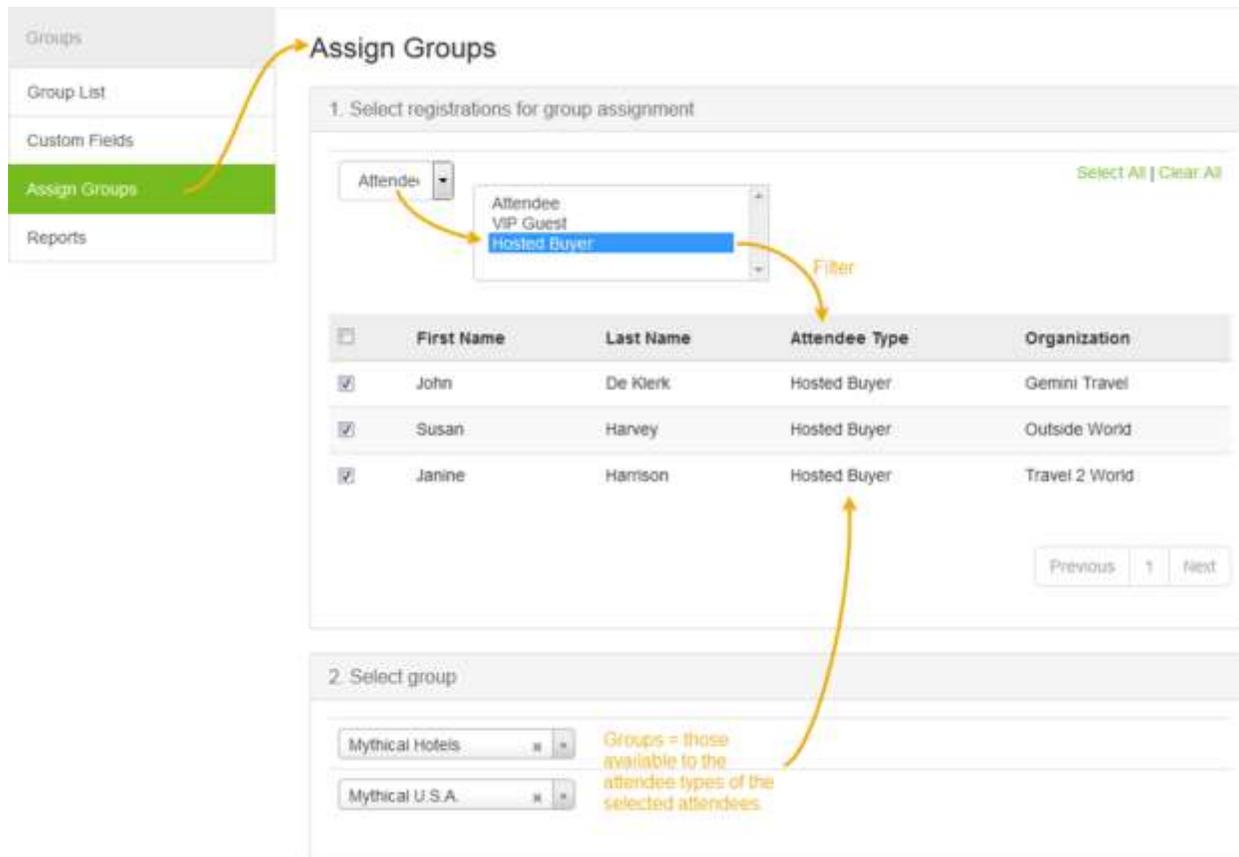
Conditions

Always apply
 Apply ONLY if these conditions are met:

IF (=

Assigning Groups in Bulk

You can assign groups in bulk, selecting multiple registrants on one page. Go to [Plan > Groups > Assign Groups](#).



The screenshot shows the 'Assign Groups' interface. On the left is a sidebar with 'Assign Groups' highlighted. The main area is divided into two steps:

1. Select registrations for group assignment

At the top, there is a filter dropdown labeled 'Attendee' with a list showing 'Attendee', 'VIP Guest', and 'Hosted Buyer'. An arrow labeled 'Filter' points from this dropdown to the table below. The table has columns for 'First Name', 'Last Name', 'Attendee Type', and 'Organization'. Three rows are visible, all with 'Hosted Buyer' as the attendee type. Each row has a checked checkbox in the first column. At the bottom right of the table are 'Previous', '1', and 'Next' buttons.

2. Select group

Below the table, there are two dropdown menus for selecting a group. The first is set to 'Mythical Hotels' and the second to 'Mythical U.S.A.'. A yellow note next to the second dropdown reads: 'Groups = those available to the attendee types of the selected attendees.'

This is a two-step process:

1. Select registrations for group assignment

- You can choose to filter the registrations displayed by one of a number of fields: First Name, Last Name, Organization, Title, City, Country, Attendee Type, Registration Questions, Travel Questions, or Profile Questions.
- Select the check boxes next to the registrations to which you want to assign groups.
- You need to be selecting registrants who *can* all be assigned the same group – they must have attendee types for which the group is set up.

2. Select group

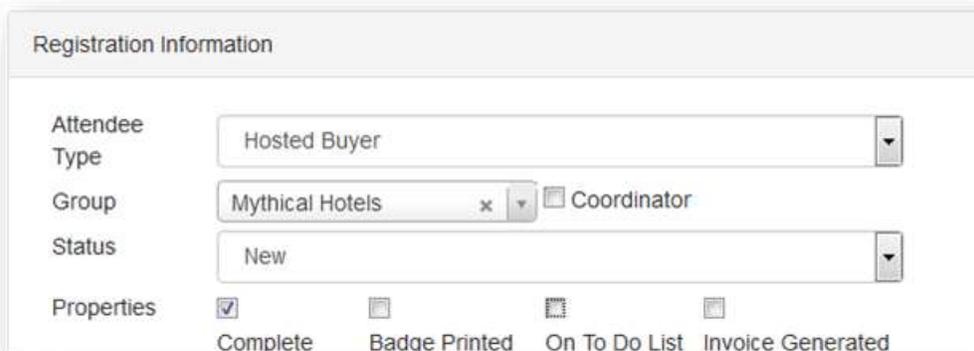
- Select the group you want to apply to the selected registrations.
- Click **Save**, and all those selected registrations will then be in the selected group.

Note: Agenda items associated with a group are only assigned to an attendee when the attendee registers via a registration form. They are *not* assigned when a planner assigns a group to an attendee ((via Assign Groups, as described above, or on their Attendee Profile, as described next).

Editing Individual Registrations

You can edit the group on a registrant's record. Go to the usual **Attendee Profile** page for that registrant; for example, by searching for them by clicking **Search**  in the global navigation icons (at top right), and clicking  **edit** on the **Registration** section heading.

The **Registration information** section at the end of the **Attendee Profile** page includes the registrant's group, which you can change by selecting a new one from the drop-down list. This section also includes a check box indicating whether the registrant is a Group Coordinator.



The screenshot shows a form titled "Registration Information" with the following fields and options:

- Attendee Type:** A dropdown menu with "Hosted Buyer" selected.
- Group:** A dropdown menu with "Mythical Hotels" selected and a close button (x). To the right is a checkbox labeled "Coordinator" which is currently unchecked.
- Status:** A dropdown menu with "New" selected.
- Properties:** A row of four checkboxes: "Complete" (checked), "Badge Printed" (unchecked), "On To Do List" (unchecked), and "Invoice Generated" (unchecked).

What's a Group Coordinator?

Each group can have one or more members who act as coordinators. These would usually be the people responsible for organizing group activities, for example. This Attendee Profile page is where you assign a registrant as coordinator, by selecting the **Coordinator** check box.

Reporting and Monitoring

Group information is available on standard and custom reports, and in emails, as explained here.

- **Group Summary Report** – Track numbers of registrants in each group. See page 12.
- **Custom Reports** – You can include group information in your own reports. See page 12.
- **Emails** – And you can include it in email templates. See page 13.

Group Summary Report

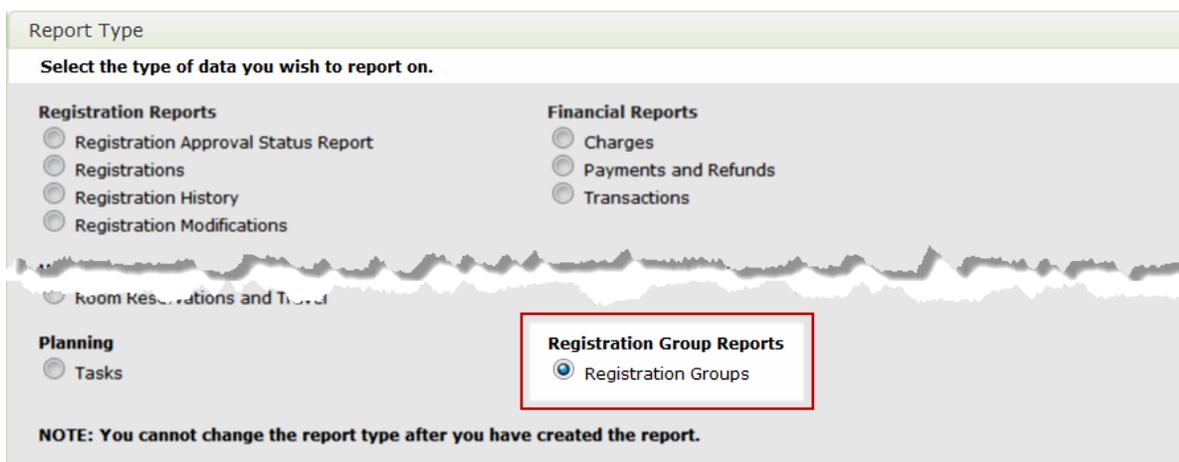
A **Group Summary Report** is shown on the [Plan > Groups > Reports](#) page. It lists all groups, with their coordinators and their numbers of attendees.

If you are using the Qualification and Approval module in your event, the last total columns on the right are one for each approval status, and the “Not Yet Qualified” column before them shows the number of registrants who have not yet completed the qualification process-the number who do not yet have an Approval Status.

Click one of the numbers on the report to open a report results window listing the attendees in that group. As usual, you can then select attendees’ records there to run mass actions, etc.

Custom Reports

To build a custom report which includes group information, select the **Registration Groups** report type, which you can find at the end of the list of report types.



Report Type

Select the type of data you wish to report on.

Registration Reports

- Registration Approval Status Report
- Registrations
- Registration History
- Registration Modifications

Financial Reports

- Charges
- Payments and Refunds
- Transactions

Registration Group Reports

- Registration Groups

Planning

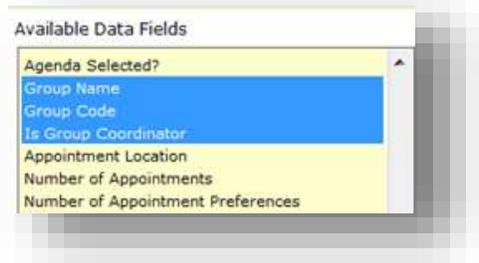
- Tasks

NOTE: You cannot change the report type after you have created the report.

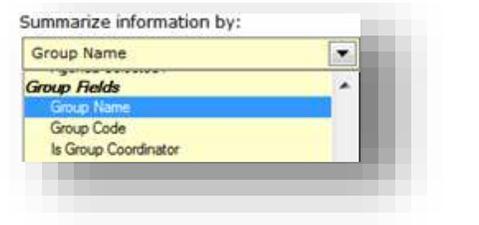
Group fields are then available in the places you would expect:

1. Select them as data fields to be included.

“Is Group Coordinator” indicates whether the registrant is the coordinator of their group, as set by the **coordinator** check box on their registration record (see page 11).



2. Group information by them (for example, by Group Name or Group Code).



3. Use them as filters



Emails

The same group fields are available for inclusion in emails. When setting up an email, you can add them as dynamic data fields just as you can other registrant information.

