GEVME

# User Guide
**RSVP Event**

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# Introduction

RSVP events are private, preventing the registration of attendees outside your guestlist, while having your event hosted online to simplify your invitation and RSVP process for prospective guests.
It allows the Attendees to select "Yes" or "No" to attend the event.



## Prerequisites

1. Database of guest list with below system mandatory fields
    a. First Name
    b. Last Name
    c. Email
2. Additional fields to be provided when the Attendee form is set up
3. Attendees must be invited via GEVME Invitation email to register for their interest
    a. RSVP response are tracked via the Invitation email

# GEVME

## RSVP Configuration

| Type | Description |
|------|-------------|
| Event Landing Page | Attendees will not see the event landing page when directed from the Invitation email.<br>RSVP Yes/ No button directs the Attendee to the respective form. |
| Tickets | Tickets are restricted to only 1 registration per attendee |
| Ticket Visibility = No | To ensure Attendees does not see the registration ticket, ensure the 'Ticket Visibility' is set to "No" |
| Open sales on | When this ticket is available for registration |
| Close sales on | When to close this ticket registration |

*\*\*Above image illustrates ticket settings*

# Forms

## Generic Form settings

There are several registration configurations you can utilise in the Forms module.
1. Allow attendee to update particulars after responded
    a. Allows Attendees to update their RSVP response by clicking on the same Invitation email button
2. Allow attendee to change response from Yes to No
3. Allow attendee to change response from No to Yes

## Attendee Form - RSVP Yes

The Attendee Form allows you to collect information the Attendees input during registration. The Attendee Form is the form through which the information of the person attending your event is captured.

In GEVME, the below system default fields are mandatory in an Attendee form:
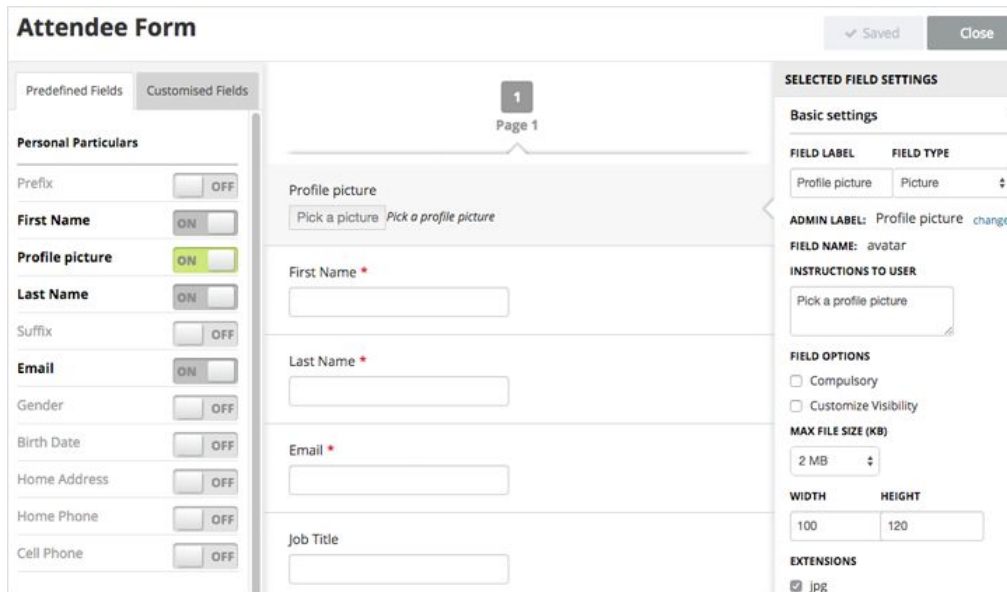1. First Name
2. Last Name
3. Email

These fields are created by default and cannot be removed from the Attendee form.

↳ Since the Attendees information is imported to send the Invitation email, the above 3 fields are pre-populated, and usually set to 'read-only' so that this information cannot be changed to another person if the email is forwarded.

| Field Name | Description |
|---|---|
| Field Label | This will appear on your registration Form |
| Field Name | This is used to map information from one form to another<br><br>This is recommended to be renamed to be similar to the field label for easy recognition |
| Instructions to user | This is used as a help text for registrants to know more about the field |
| Field Options | Readonly / Compulsory / Customise |

| | Visibility |
|---|---|
| Validations and limits | This is used when there are limitations to the field<br>- Choices selection<br>- Limit on number of words / characters |


*\*\*Above image illustrates backend field settings*

## RSVP No Form

The RSVP No Form allows you to gather the reason for not attending the event. You may also add in more fields for the Attendees to input when they respond RSVP No.
This form is optional, enable it if you want to collect information from Attendees who RSVP No.

## Admin Form - Internal reference

GEVME system users are to make use of Admin Form to make changes to an Attendees' submitted information.

All fields in Admin Form are set up to map from either of the below forms:
1. Buyer Form
2. Attendee Form

![GEVME logo]

In order for fields to be mapped from one form to another, the **field name** for the fields set up must be the same in both forms.
This is usually set up the same way as the Attendee form.

## Customising Form Fields via Predefined Fields

Predefined fields are fields which we have preconfigured for your convenience and ease of use. There are a few system default predefined fields like Gender, Birth Date, Cell Phone, etc. which you can simply enable or disable on your form.
Predefined fields are set up to easily add the standard fields to collect for your events.
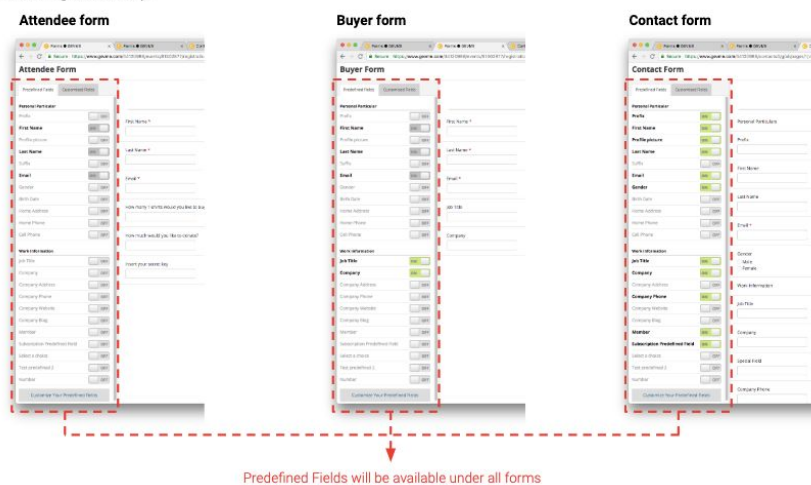


*\*\*Above image illustrates predefined fields available for all forms in GEVME*

To customize predefined fields, select any Forms in GEVME and click on the 'Customize Your Predefined Fields' link.

## Sync the Predefined Fields

By enabling the predefined fields, it ensures consistency throughout your forms and thus syncs the data from one collection to another.

For example, if you have the Company predefined field turned on in your Attendee form and the same predefined Company field turned on in your Contacts form, once an attendee registers for your event, a corresponding record for them will be created in your Contacts collection with the corresponding Company value filled in.

This is achieved by having the same field name of the fields across different forms.
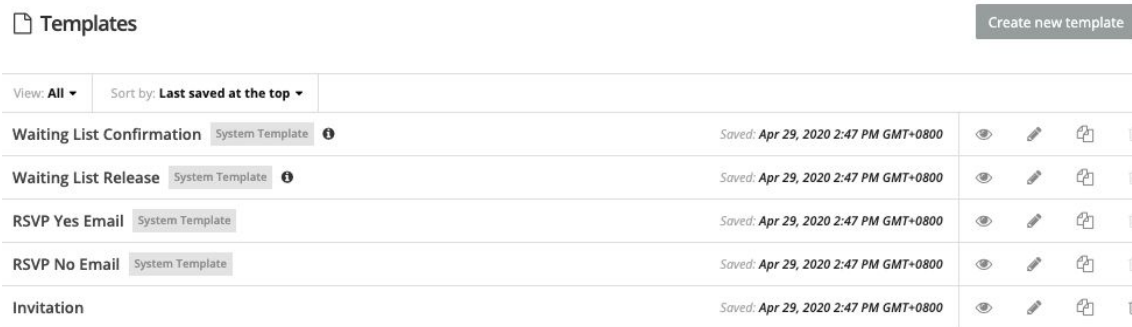
↳ The First Name, Last Name and Email Predefined fields are compulsory in all GEVME forms and cannot be removed.
A predefined field can be used only once on each form.

# Email Marketing

## Email Templates

This module allows you to create sample templates to be sent to Attendees for the event. By default, system templates are created for you and ready to be used.



*\*\*Above image illustrates backend email templates*

| Email Template | Description |
|---|---|
| Invitation | This template is sent to the invited Attendees for their response. |
| RSVP Yes | This template is sent to the responded Attendees who RSVP Yes |
| RSVP No | This template is sent to the responded Attendees who RSVP No.<br>Attendees will be directed to the Event landing page (when responded 'No') if this is disabled. |

## Customising the Invitation Email

By default, GEVME will generate the 'CTA' button in the Invitation email templates that is ready for use. However, you're required to update the CTA button to allow Attendees to RSVP their responses. To do so, please follow the below instructions:
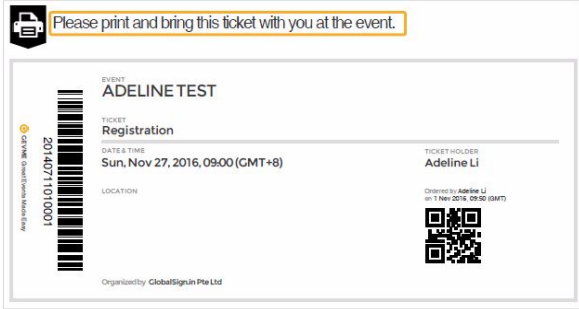
1. In the 'Invitation' email template
2. Remove the CTA "Register Now"
3. Add a new CTA button for "RSVP Yes/No"
4. These system RSVP buttons will direct the Attendees to the respective forms.

# Automated Messages & Emails

Configure the messages and emails your Attendees sees and receives in the 'Automated Messages & Emails' module.
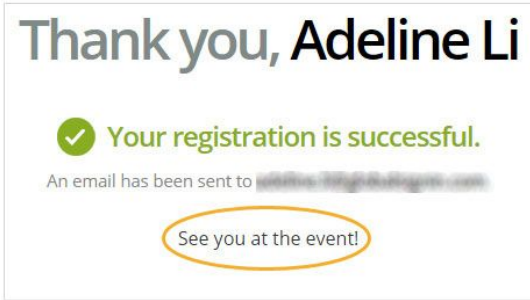
## Confirmation Email - RSVP Yes

This section allows you to configure the settings when Attendees receives the system Confirmation email.

| Settings | Description |
|---|---|
| Send automatically to ticket buyer/main registrant | Enable to allow Confirmation email to be sent to ticket buyer/ main registrant automatically upon successful registration |
| Attach .ics file | Enable to allow Attendee to add the event into their own calendar |
| Attach ticket(s) to the email | Enable to attach QR Ticket to the Confirmation email |
| Instructions on ticket | <ul><li>This is displayed only if you enable the main option to send attached QR ticket to the Confirmation email</li><li>The header text on the QR ticket can be customisable here</li></ul><br> |

| Cc to | Enable and input the email addresses to be "CC-ed" in each Confirmation email |
| Bcc to | Enable and input the email addresses to be "BCC-ed" in each Confirmation email |

## Confirmation Page

This section allows you to configure the settings when Attendees lands at the Confirmation page upon successful registration.

| Settings | Description |
| --- | --- |
| Confirmation Page Message | Customise the text message on the Confirmation Page when Attendees completes registration  |
| Show QR Code(s) | Enable to embed QR Codes in the Confirmation page |
| Show order summary | Enable to display Ticket Buyer Information |

Click on the "Preview the Confirmation Page" to view each setting.

## Registration is Closed Message

This section allows you to customise the message when registration has ended. This is displayed on the event landing page under the 'description' section.
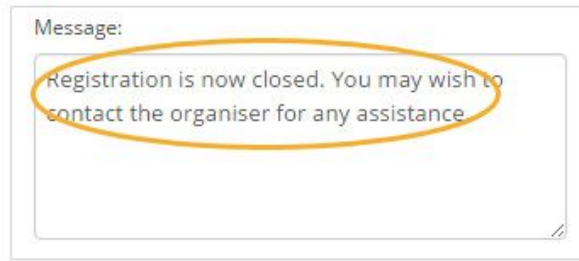
**Above image illustrates backend registration message*



**Above image illustrates frontend registration message*

## RSVP Cancelled Message

This allows you to customise the message when an invitation is cancelled and the Attendee clicks on the email to respond to the event. This is displayed on the event landing page under the 'description' section.

## RSVP No Message

This allows you to customise the message when the Attendee clicks on the 'No' response in the invitation email, and submits the registration form (if enabled).
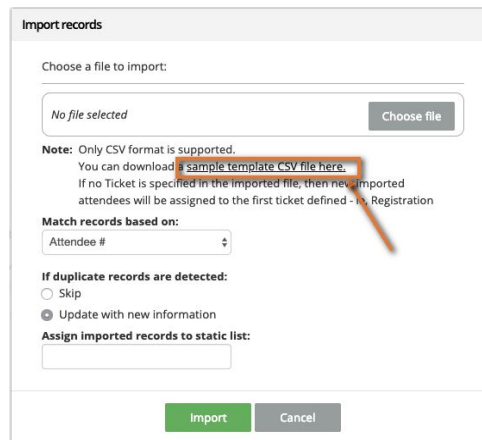
## RSVP Yes Message

This allows you to customise the message when the Attendee clicks on the 'Yes' response in the invitation email, and submits the registration form.
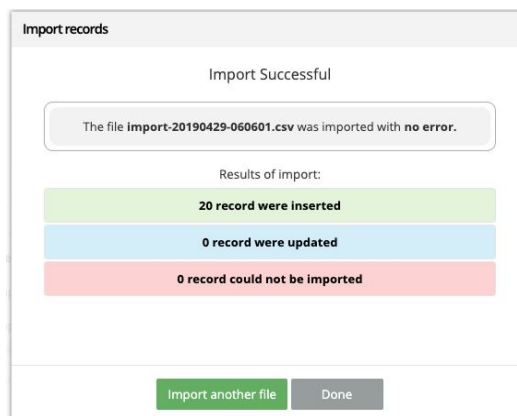
# Import Attendees

Once you've completed the event set up, the next step would be to invite your database of guests to attend the event.

1. To do so, navigate to the 'Attendees' module under the 'Manage' section
2. Click on the 'Import' button, a pop up 'Import Records' is displayed
3. Click on the 'Download a sample template CSV file' to retrieve the latest fields as set up in the Attendee form



4. In the exported file, fill in the necessary information in the stated columns
5. Once it's ready, import the updated file into the Attendees grid by clicking on the 'Import' button
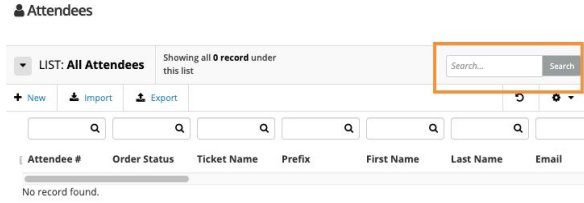6. Upon successful upload, the below message is displayed:



↳ If you don't have all the information, leave it empty. Do not delete columns, as the system will not be able to detect the file due to missing columns.
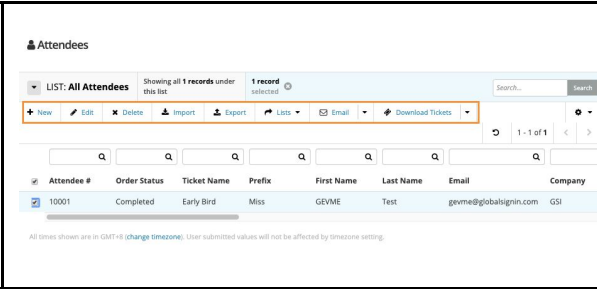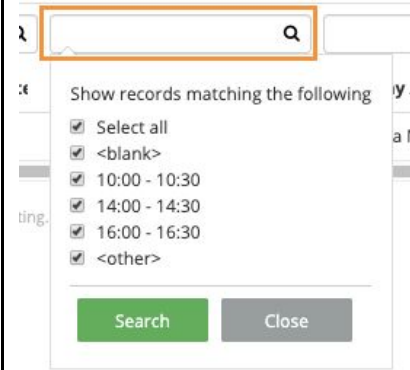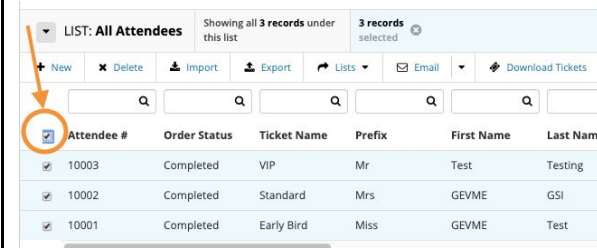
# Manage Attendees

The Attendees module shows all the attendees who have successfully RSVP for your event. In the Attendees grid, there are several functions available to help group your Attendees.
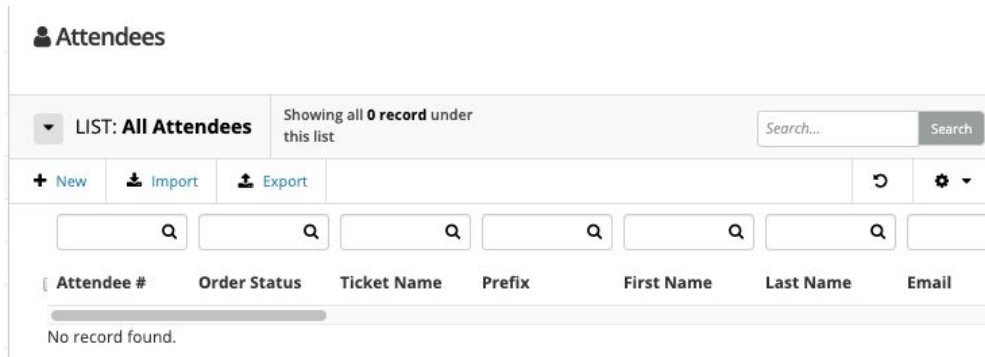


*\*\*Above image illustrates the backend view of the Attendees grid*

| Fields | Description |
| --- | --- |
| List: All Attendees | The **List Selector** defines the records that show in the grid.<br>Clicking on the dropdown arrow will then allow you to switch to other lists and load the records under those lists. |
| General Search Box | The General Search Box allows you to search across *all* the columns of all your records.<br><br> |
| Action Bar | The grid's Action Bar contains the buttons representing the various possible actions on the grid, e.g. creating a new record, exporting the record, downloading e-tickets, emailing the record etc as shown here: |

| Column Search Box | The Column Search Box allows you to search through a specific column only. Depending on the type of the data in the column being searched, the search options will be different, e.g. for a dropdown or checkbox type, the options in the search box will be like this:<br><br> |
| --- | --- |
| All Records Selector | Checking the All Records Selector checkbox will select all the records on the current page like so:<br><br> |
| Individual Record Selector | Check the Individual Record Selector checkbox to select a single record. |
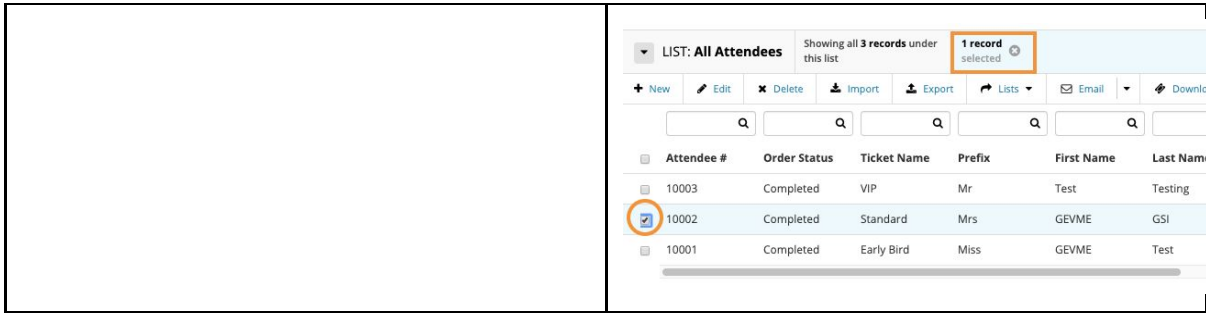
## Static List

Static Lists are segments where you can assign a record to this segment. This is similar to the concept of folders (segments) and files (record) but with an added bonus: you can assign a record to more than one static list.

The "Create a list" button allows you to create a list for the first time as shown below e.g. VIP:
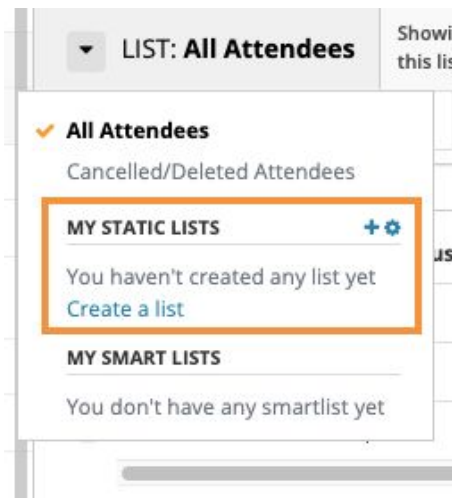


*\*\*Above image illustrates where to create a Static list*

You simply need to click on the "+" button to keep creating and adding new Static Lists like so:
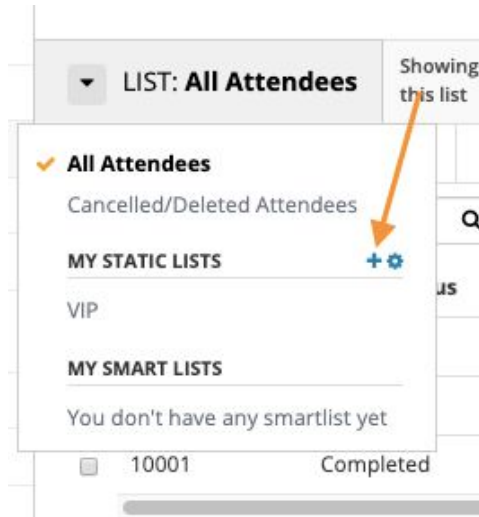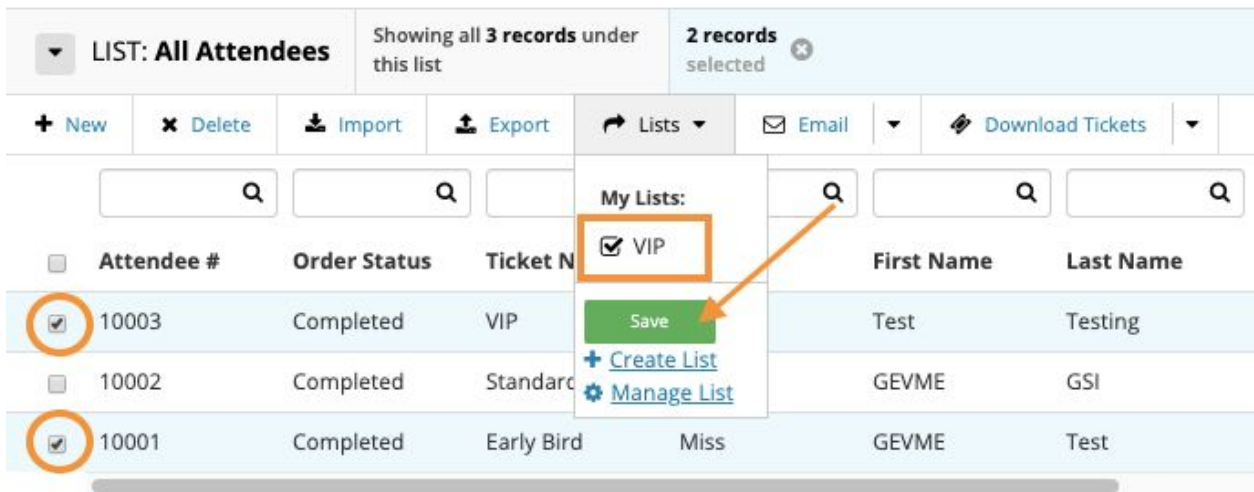
*\*\*Above image illustrates how to keep adding Static Lists*

## Assign Attendees to Static List

To assign one or more records to a static list:
1. Select the record(s) in the grid.
2. Click on the "**Lists**" button which appears in the action toolbar.



*\*\*Above image illustrates how to add record(s) to a specific Static List*
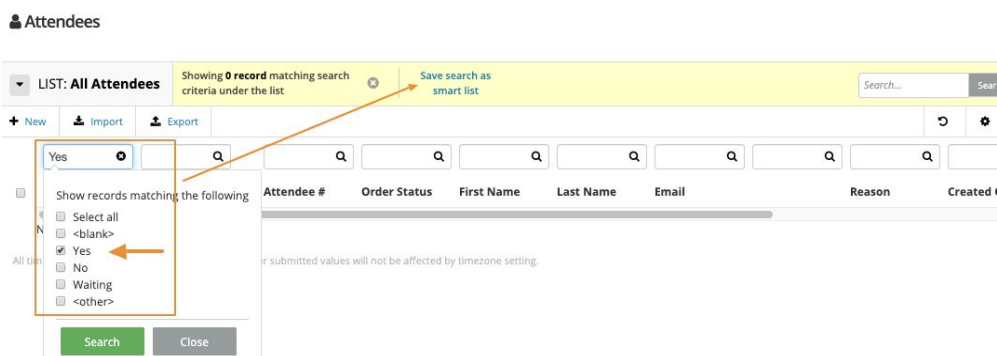
## Smart List

Smart Lists are filters, or searches, used to create a list or segment. Smart lists therefore, are updated real-time upon the contact/attendee/orders fulfilling the search criteria. In that sense, smart lists can be considered as being "saved searches" which, at any point in time, consists of the records which match the criteria of the search.

## Create Smart List

To create a Smart List, simply start by doing a search. For example, to create a smart list of Attendees who RSVP 'Yes':
1. Search the RSVP column for "Yes".
2. Once the search is performed, click on the Save search as smart list at the top of the grid.
3. All future RSVP 'Yes' responses will automatically be added into the saved Smart List



*\*\*Above image illustrates how to create a Smart List based on a criteria of search*

## Accessing the created lists

To access your created lists, click on the list selector dropdown in the top left hand corner of the grid you are currently managing, then click on the smart list which you want to load in the grid.
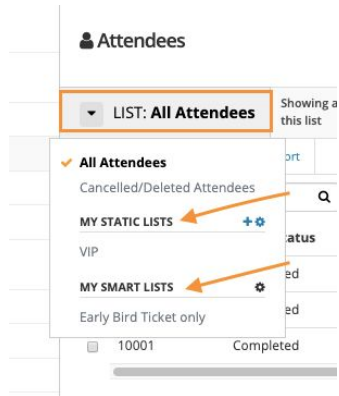
*\*\*Above image illustrates where to locate your lists (both Static & Smart)*