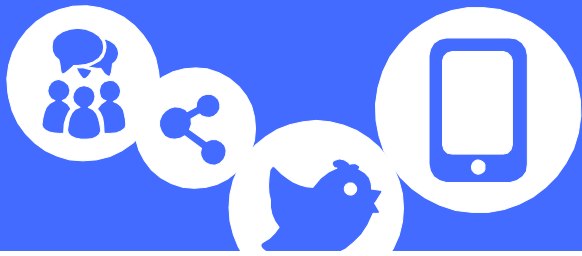




How to: Add and Link Products

EventReference User Guide # 21





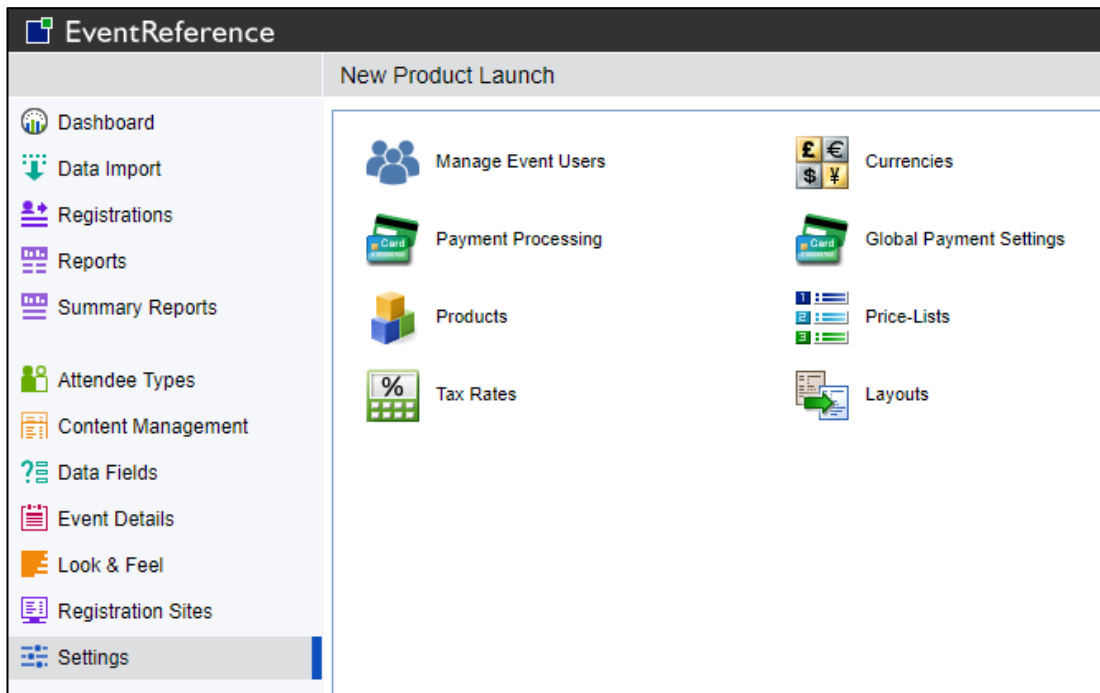
In order to set up products in EventReference, you must have the Payment Processing add-on bundle active on your event. Activating this add-on will automatically add the relevant features to your event.

Products can be used in two ways:

- 1 – Associated with an attendee type as a registration cost
- 2 – As a list of items that can be added to a shopping basket

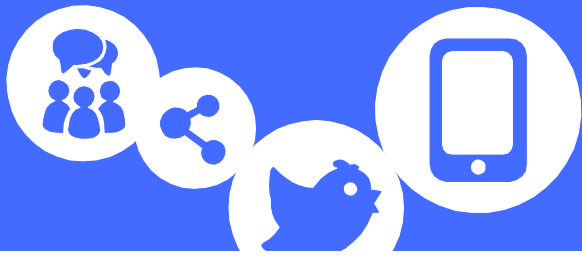
Adding products

Click on *Settings* in the menu on the left.



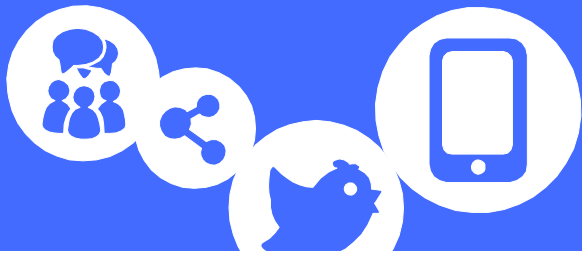
Select *Products*.

+ Add Product - Delete Product				
Product Name	Type	Catalogue Item?	Active?	Price
No Products				



Click *Add Product*.

- Product Name - This will appear in the basket and on the summary.
- Product Short Name - You can also enter a short name if you want, which will appear on your reports instead of the full product name.
- Gross Price - Enter price, including tax
- Tax Rate - select the tax rate you are using from the drop down and then click Calculate. The amount of tax will be displayed in the *Tax Amount* box.
- Active - Ensure this is ticked (it should be by default) so that your product is available to use.
- Catalogue Item - To have the product displayed in a list for selection, tick this box.
- Only Show For - If you only want to allow certain attendee types to buy the product, tick the boxes next to the relevant ones (catalogue items only). This does not link a product to an attendee type - see the next section for how to do this.
- Display Order - To have your products display in a specific order, enter the required number in the box.



You can add price lists to your products to allow prices to automatically change on a set date. For more information on how to do this, please see the 'Setting up Price Lists' guide.

Click **Save**.

Linking products

If you need to have a cost associated with an attendee type (for example a registration fee), you need to link the relevant product to that attendee type.

To do this, select *Attendee Types* from the menu on the left

Double click on the attendee type you want to edit.

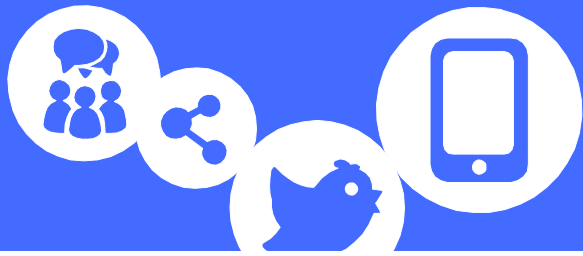
Click on the *Payments* tab.

The screenshot shows the 'New Product Launch' form with the 'Payments' tab selected. The form contains the following fields and options:

- Attendee Type Name: Delegate
- Registration URL: http://58d25d638e94f.eventreference.com/
- Registration Open:
- Registration Start: [] : [00] : [00]
- Registration End: [] : [00] : [00]
- Capacity: 0 (0 = Unlimited)
- Target Number: 0 (0 = No Target)
- Badge Layout: Please select.
- Hide on Default Event Page:
- Actions: [Actions] [Look & Feel] [Payments]
- Linked Product: No Linked Product
- Show Products?: No
- Payment Gateways: All payment gateways, Only the following payment gateways: Invoice, NETBANX - Hosted

Select which product you want to link to the attendee type. If you don't want to link any products, leave this set to No Linked Product.

If you also have a list of other products (catalogue items) that will be displayed to the registrant, select whether you want this to appear before or after they complete the registration form. If you have no other catalogue items, leave this set to No.



N.B. You cannot link a catalogue product as a main product. To have a product in both places, you need to create two products; one with the catalogue option unticked (this is the one you should link) and one with it ticked (this will appear in the list).

You can also select which payment gateways you want to associate with this attendee type. For more information on payment gateways, see the guide on 'How to Link Your Payment Gateways'.

Click *Save*.

Do the same for any other attendee types you need to link products to.

EventReference



Event Registration



Paid Registration



Event Management



WebBadging



Event Reporting



WebScanning

YOUR EVENT. YOUR WAY.

Self-service registration & badging

"I've signed up for EventReference"

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

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

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

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

What our customers say...

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

Madalina Marincas, OPENING DOORS & VENUES

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