etouches

etouches Getting Started Guide

V4.0, January 2018

Contents

Purpose of this guide

The purpose of this guide is to introduce you to the etouches software as a services (SaaS) platform and show you how to get started with etouches. It is based on commonly used features in etouches and aims to get you up and started with a basic event.

This document is not designed to be a full and complete guide to all of the etouches platform functionality and features. If you want to get to know the system further we would recommend you investigate the etouches support portal, sign up for an inclusive support training, or purchase training from etouches, professional services.

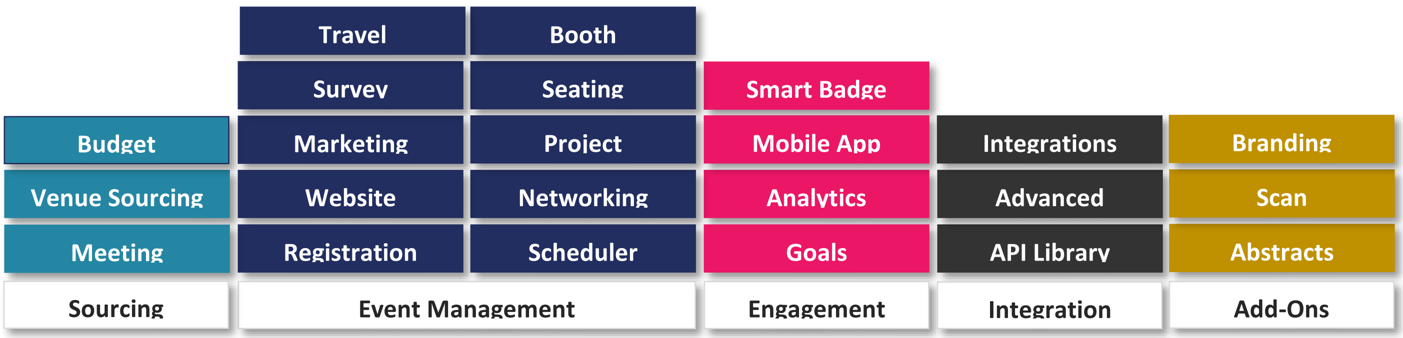
13 Marshall St # 1,
Norwalk, CT 06854,
United States

www.etouches.com

Introduction to etouches

What is etouches

etouches is a cloud based, success oriented platform allowing Corporations, Associations, PCOs, Agencies, Education Institutions and any event organizer to manage all aspects of an event. It has over 16 different event management modules to help you organize any aspect of your event.



Front-end Vs Back-end

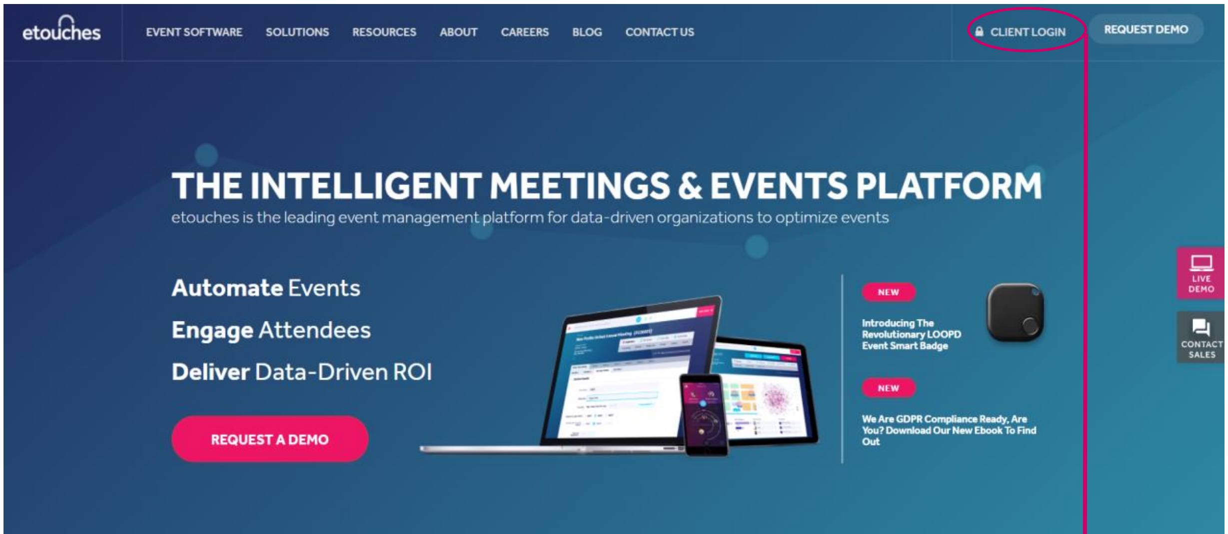
The etouches is broken into two views what the web pages that the attendees will see when they are registering for an event such as the registration pages and event website, this is known as the *front-end*.

The back-end is the etouches administrative platform where you do things such as, create the events; set-up the registration pages and event websites.

Changes made in the back-end are usually instantly viewable in the front-end, after being saved, and it is recommended that you test any changes made in the back-end in the front-end, before you ‘go live’ with any event.

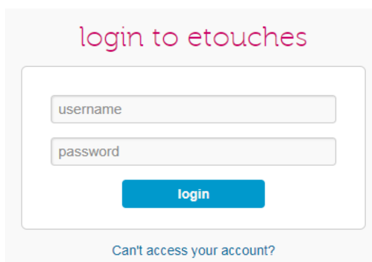
Logging into etouches

1 Navigate to the etouches website https://www.etouches.com

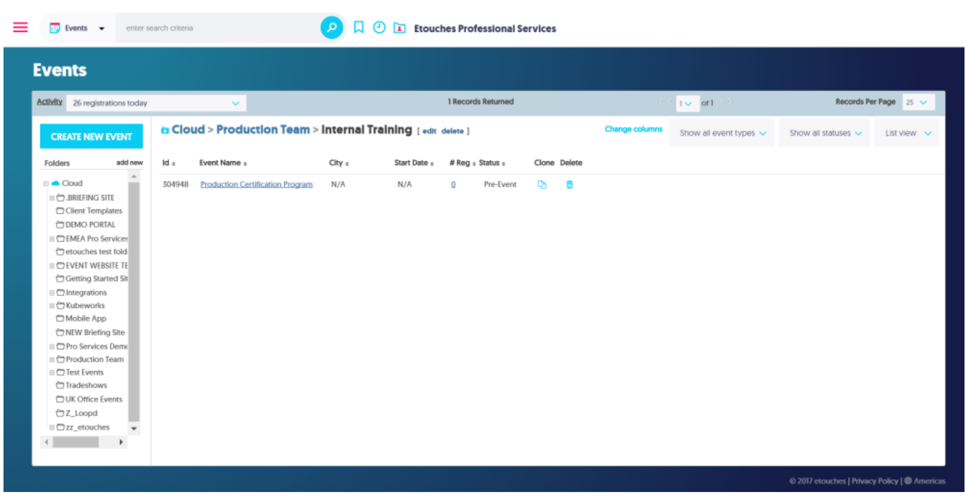


2 Click on **Client Login** in the top right corner.

3 Enter your **username** and **password** and click **login**



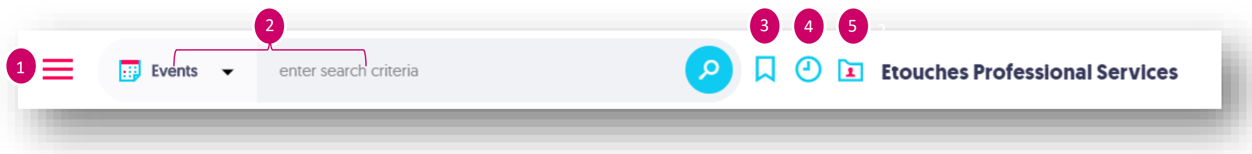
The **Events Browser** window will display:



*• If you have **not** been issued a username and password please contact your company's nominated etouches administrator or contact the etouches support team.*

Menu's and Navigation

Top Navigation Bar



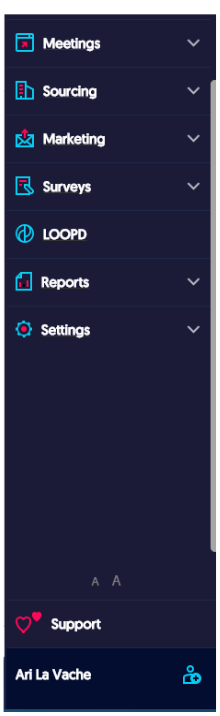
The Top Navigation bar, provides access to some common areas within the etouches platform:

1. **Hidden Menu Bar** (see below): allows you to navigate to the etouches modules which are not directly linked to your event (e. g. Marketing, Website etc.)
2. **Search Criteria Menu:** this allows you to search for events, Attendees, Surveys, Email Messages, mailing Lists, users, Contacts DB, prospects).
3. **Bookmarks**: this allows you to save the page you are on for quick access later.
4. **Recently Viewed:** this shows the last five (5) pages you accessed.
5. **Account**: this will display your account name.

There are seven common areas within the etouches platform, that enable you to navigate:

Hidden Menu Bar

The hidden menu bar provides you with access to various modules and administrative functions based on your account license. To access the Hidden Menu Bar, select the menu icon (in the top left corner of the page):



The contents of this Hidden Menu are based on your account.

Each module can be accessed from here (e.g. Marketing, Surveys etc.). Each module includes a **drop-down** arrow for further options.

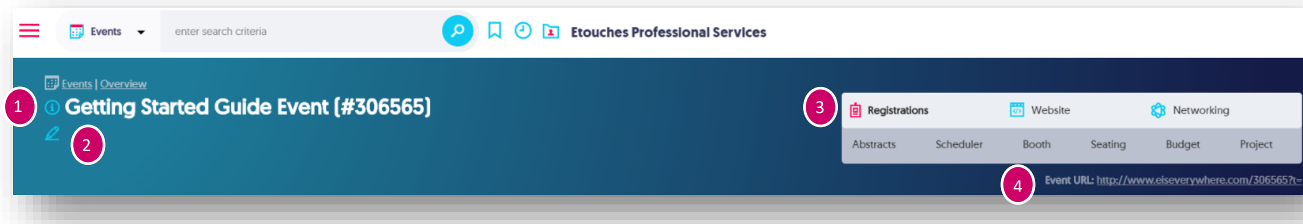
Settings provide you access to your account level templates, databases, user profiles etc. Based on your access profile permissions.

Support, provides you access to the client support portal

Your **username** at the bottom allows you to manage your **personal settings** (e.g. change password etc.)

Quick Access Dashboard

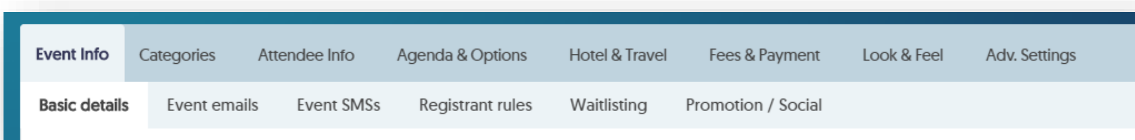
When you are within an event, you also have access to the Quick Access Dashboard. It provides you information as well as functions:



1. **Event Information Icon**: next to the Event Name is the information icon, it includes specific event information such as (the name of the event, the account and folder it is saved within, the user who created the event, as well as the date and time of its creation).
2. **Edit Icon**: This will bring you back to the event module to edit the settings.
3. **Module Menu**: This allows you to perform a range of settings and functions including linking them to an event.
4. **Event** URL: This is the website address of your event registration form.

Module Tabs

Module tabs provide you access to various components of your event settings. Covered later in this guide.



The Save & Stay and the Save & Exit buttons

Most module settings and tabs have a Save & Stay and a Save & Exit button, normally located at the top and bottom of the pages. It is essential that you use these regularly to ***avoid losing changes*** (made to settings) if you navigate away from the current screen.

Save & Stay will save any changes you have made and <u>keep</u> you on the current screen.

Save & Exit will save any changes you have made and <u>close</u> the current screen.

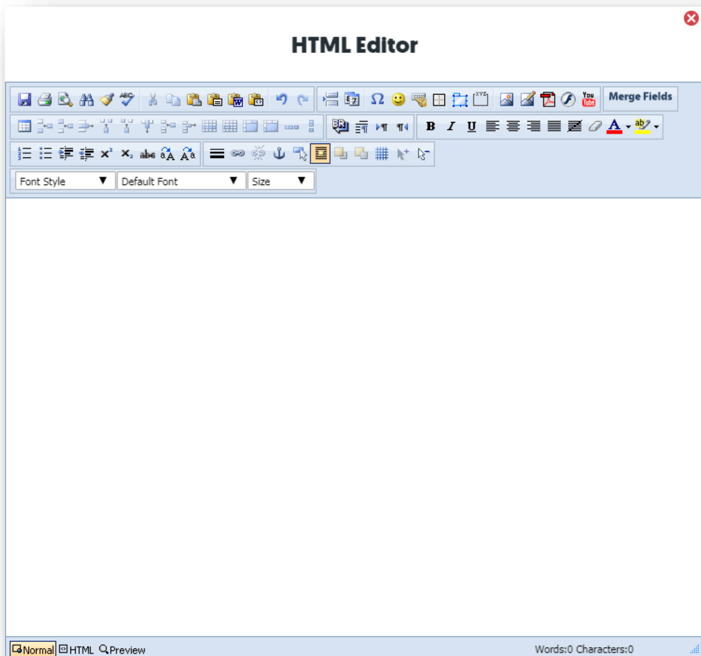
We recommend you use the **Save & Stay** *button regularly when making changes.*

> If you fail to press the Save & Stay or Save & Exit buttons before moving away from your current settings page, any changes you make will be lost.

The HTML Editor

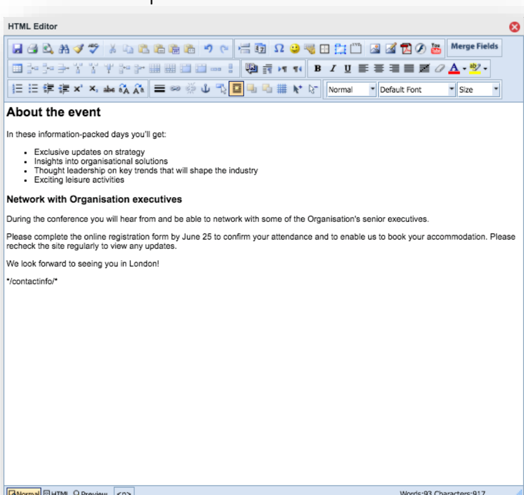
Within the etouches software there are a number of areas that allow you to edit the content using a Rich Text/HTML format. Whenever, you see the below button next to a field:

The rich text/HTML editor is available for use. The button will launch the HTML editor window.



The rich text/HTML editor allows you to have control over text formatting and gives you the ability to insert hyperlinks, images and document links (amongst other options).

Below is an example of how text in the HTML editor is rendered on a page:



ABOUT THE EVENT

In these information-packed days you'll get:

- Exclusive updates on strategy
- Insights into organisational solutions
- Thought leadership on key trends that will shape the industry
- Exciting leisure activities

Network with Organisation executives

During the conference you will hear from and be able to network with some of the Organisation's senior executives.

Please complete the online registration form by June 25 to confirm your attendance and to enable us to book your accommodation. Please recheck the site regularly to view any updates.

We look forward to seeing you in London!

Simon Roberts
sroberts@etouches.com

Cloning Vs Creating an Event

There are two options to create a new event in etouches by **cloning** another event or **creating** a new event from scratch:

Clone allows you to copy the structure of an existing event. It will create a new event based on the module settings of another event. You can select which event modules you want to clone and will bring through all the settings of that event into the new event. Including all the look & feel settings such as fonts, colors and logos. Individual registration records will **not** be copied across.

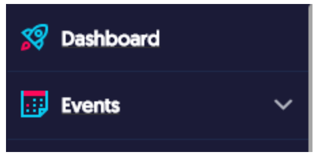
New event this method allows you to create a new event from scratch, fully customizing all the module settings for the event.

If you have purchased cloneable events/event template(s) from the etouches professional services team, you will be using the clone feature to create a new event.

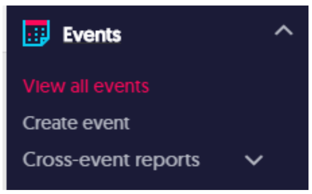
Option 1 - Creating a New Event

The steps below will guide you through creating an event from the beginning.

1 To view all events you have access to, click on the **Hidden Menu Bar** ≡ and then select **Events**.



2 From the drop-down arrow, select **View all Events**.

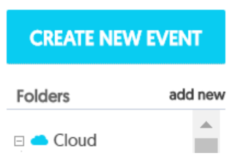


As your user settings may have restricted visibility, not all folders may be visible.

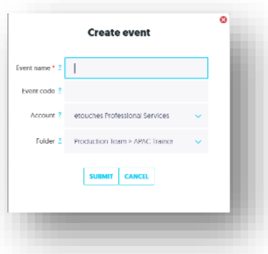
3 Ensure you have a user folder created by selecting **Folder > Add New** (If required).

If you already have the correct folder created, simply select the folder you wish to use to create the event into.

4 To create a new event select **Create New Event**.



The *Create New Event* **Dialog box** will open:



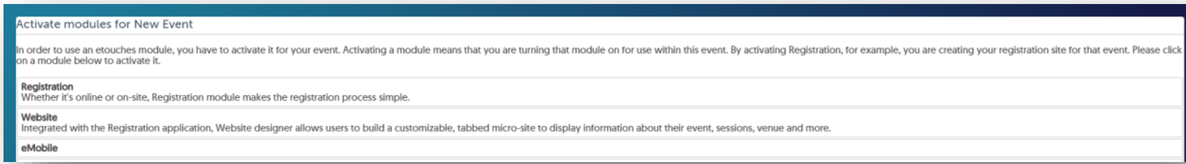
5 Set the following attributes:

Event Name	The name of this specific event you are creating.
Event Code	An internal event code that you use to track your event (e.g. internal purchase order number)
Folder	The folder you wish to save your event into.

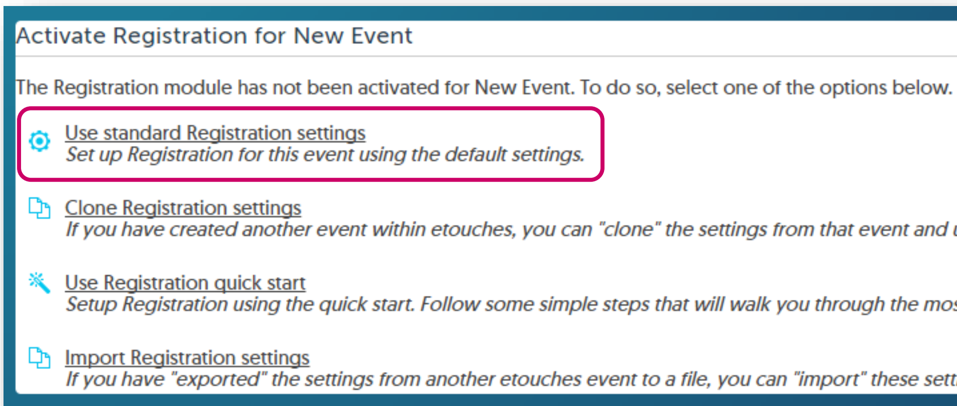
6 Select **Submit**.

Once the event has been created you will need to activate the registration module, all of the available modules to be activated will be listed.

7 In the *Activate Modules* screen select **registration** to activate the module.



You will be prompted with the settings for the creation of the registration site. There are four available settings:



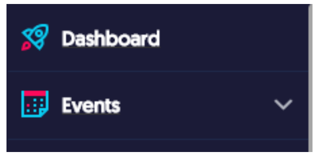
8 Select **Use Standard registration module settings**.

The registration module will now be activated for your new event.

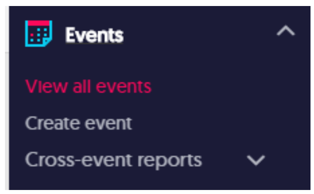
Option 2 - Cloning an Event

When you Clone an event, it will clone all the existing settings of that event. It will not clone any registration data contained in that event.

1 To view all events you have access to, click the **Hidden Menu Bar** ☰ and then select **Events**.



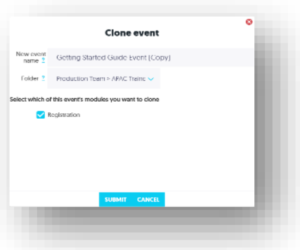
2 From the drop-down arrow, select **View all Events**.



> As your user settings may have restricted visibility, not all folders may be visible.

3 On the event dashboard select **Clone** next to the current event.

4 The *Clone Event* **dialog** will open.



5 Set the following attributes:

Event Name	The name of this specific event you are creating.
Event Code	An internal event code that you use to track your event (e.g. internal purchase order number)
Folder	The folder you wish to save your event into.
Select which modules you want to clone	Select the modules you wish to clone across to the new event you are creating.

6 Select **Submit**.

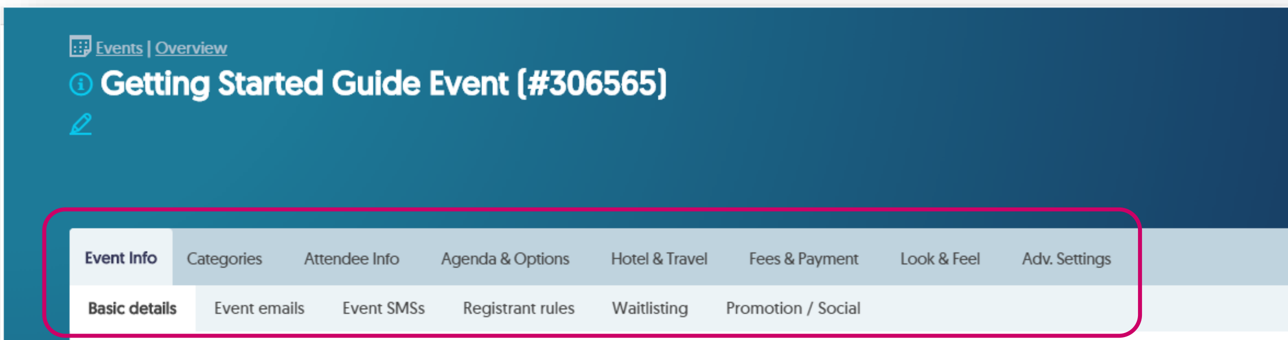
Creating a Registration Site

The registration module refers to the module that manages the settings, management and capture of registrant's details for an event.

It allows you to set-up the basic details of the event, the types (categories) of attendees you are expecting to register for your event, and the details you wish to capture, the payment information, as well as controlling the look and feel of the registration pages.

This is usually the first module you will set-up in etouches as any other modules you use in the etouches platform that are linked to a specific event will use the details set up in the registration module for this event.

The following setting are completed within the **Module Tabs**:



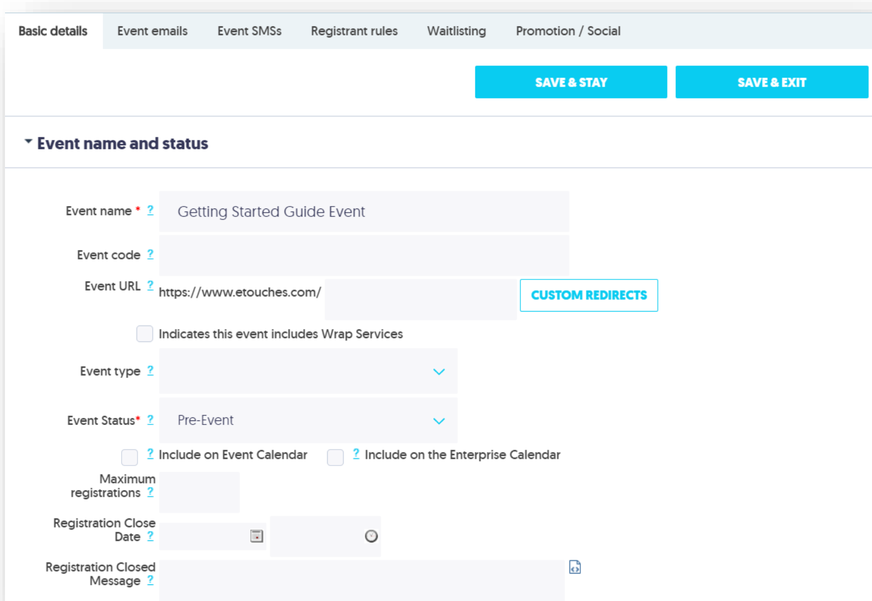
Basic Details

The Basic Details tab will enable you to set the standard attributes of the event these can be altered at any time, and changes will be reflected on the attendee registration page as soon as you have changed the settings. The event details contain common information related to the events such as dates and time.

Setting the Basic Details

The Basic Details tab will enable you to set the standard attributes of the event these can be altered at any time, and changes will be reflected on the attendee registration page as soon as you have changed the settings.

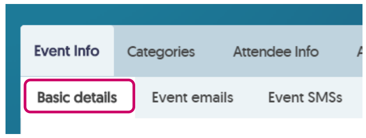
This common event information such as dates and times can later be used as merge fields. These merge fields can then be pulled through from this page and shown elsewhere, such as in Event Emails, Registration pages, event website pages, etc.



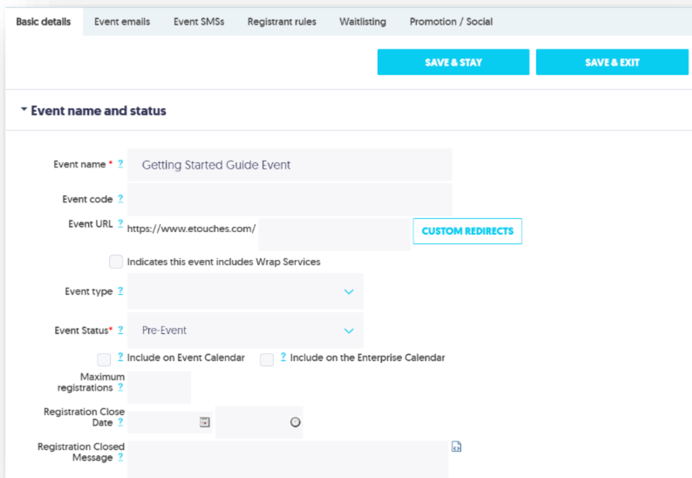
The steps below will guide you through setting up the basic details of your event.

Items marked with a red asterisk * are mandatory fields and must be completed **before** proceeding.

1 In etouches **registration module** select **Basic Details**.



The *Basic Details* **Tab** will display.

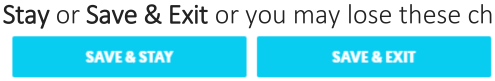


2 In the *Basic Details* **tab,** the following attributes are important (but not compulsory) to fill in:

Event Name	Name of this specific event.
Event Status	This should be set to *Pre-Event* until you are ready to go live (receive registrations). Otherwise you may be charged for any registrations you set up against this event. In *Pre-Event* no charges are applied.
Registration Close Date	Date and time that the registration page will close (no further registrations can be received)
Registration Close Message	The message registrants will see if they try to register after the event registration has closed.
Location Name	Name of the event location
Address Line 1	Address of the event location
City	City the event is taking place in
Start Date	Date and time the event will start
End Date	Date and time the event will end
Date Format	Date format for the event (e.g. DD/MM/YYYY)
Time Zone	Time Zone of the location of the event
Contact Info	Your company's contact details for enquires about this event (e.g. email address, phone number etc.)

The event type and event code fields may be used by your company for reporting purposes. You should ask your organizations etouches administrator to clarify.

3 Make sure you Select **Save & Stay** or **Save & Exit** or you may lose these changes.



Attendee Categories

The registration module Categories tab is used to create different groups or categories of registrants that will be attending your event. (e.g. staff, guest speakers, VIPs, sponsored delegates, members/non-members, etc.).

Categories are very important in etouches, as using different categories will allow you to create a different registration experience for each category you create (e.g. different payment rates, invited to partial or whole event, specific hotel/travel options, etc.).

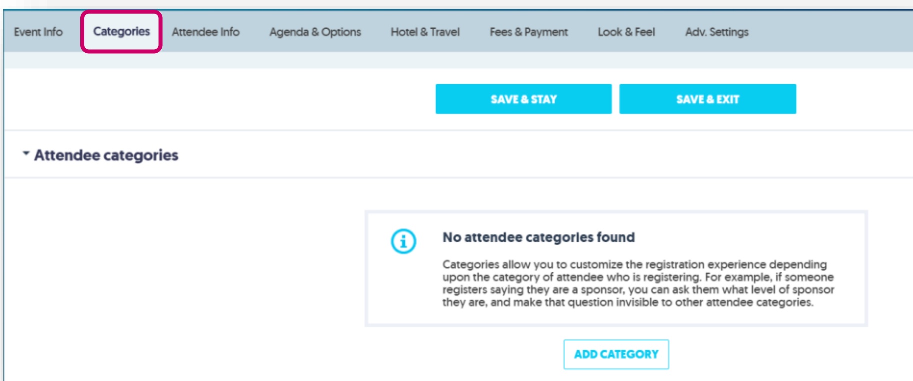
For example, you could set up the registration process so a VIP will have travel options whereas a staff member will not.

> ⚠ It is always advisable to have at least one category added to your event.

The below steps below will guide you through adding a new category to your event.

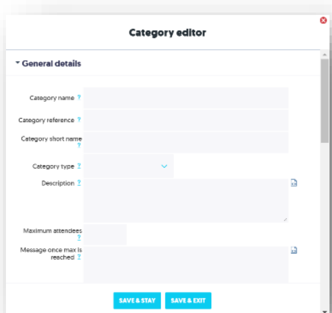
1 In etouches **registration module** select **Categories**.

The *Categories* **Tab** will display.



2 Select **Add category**.

The *Add Category* **Editor** will open in a new window:

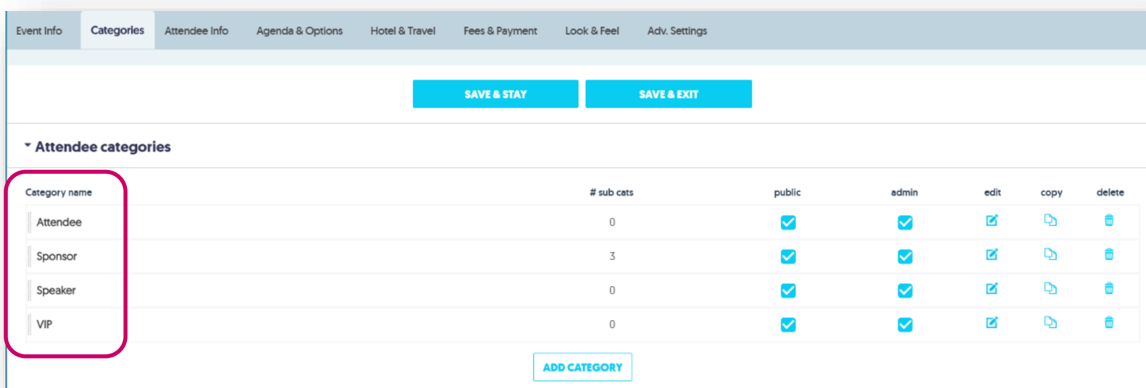


3 In the **General Details** drop-down set the following attributes:

Name	Category name e.g. guest speaker, VIP, etc.
Description	Description of category: Registrants will see this and it will help them to decide whether the category applies to them.
Maximum Attendees	(if applicable): Specify the maximum number of registrants that can select this category.
Message once maximum number is reached	This is the message that will appear to registrants once the category is full.
Sub-Category	Click the Add Sub-Category button if you wish to create a sub-category (e.g. Attendee – Member and Non-member; Vendor – Sponsor and Booth Staff).
Visibility Settings	Here you can choose if this category is available to Public Registrations (online registrants) or Admin Registrations (only internal etouches users may register this category type).
Advanced Settings	Allows you to select display options, password options, available dates, event calendar details and permissions for registering additional attendees

4 Select **Save & Exit**.

You should now be able to see the category(ies) you added as well as any sub categories:

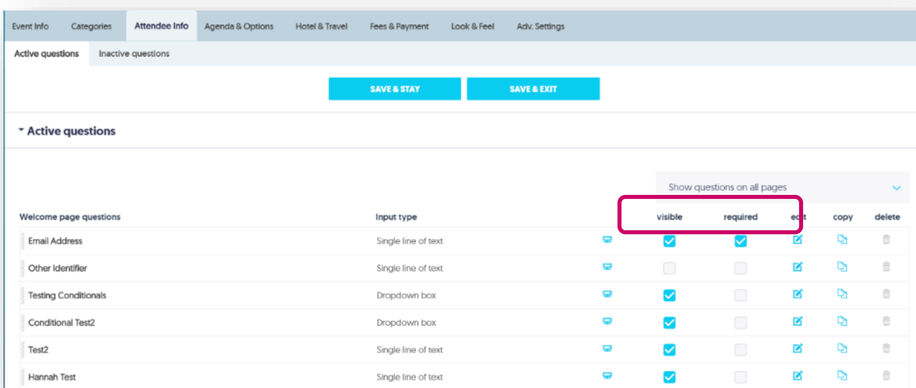


Attendee Information

Here you can set up all the questions available to registrants, within the registration process. Here you can also choose which questions, are seen by your registrants and which are required to be field in during the registration process, by selecting the Visible and Required checkbox options. You can also, within the question setup screen, determine which questions are visible and required by category type.

It is recommended that the **Welcome Page** questions, asks for the Email Address as a unique identifier. Given that, throughout etouches, the email address is also a source of email information about the event, the email field should be required for all online registrants. The **Attendee Information Page** questions should contain questions with regards to registrant details such as; first name, last name, job title, company, address, etc. etouches provides you with a pre-loaded list of commonly used questions which you can choose to add to, edit or delete as required.

When in the main screen for Attendee Information in etouches, you will notice that the columns are headed by a Visible and Required field.



The **Visible** column indicates whether or not the question is visible to all categories. Tick or un-tick any questions that all registrants should/should not see or select the edit icon to specifically allocate attendee categories to view this question. When the question is only visible to some registrant categories, it displays as "partial" in the Visible column. Visibility by User type allows you to choose Public Users and/or Admin Users. This means that the session is visible to Public users - those who register themselves; and/or Admin users – an internal registration function that can bypass any mandatory fields.

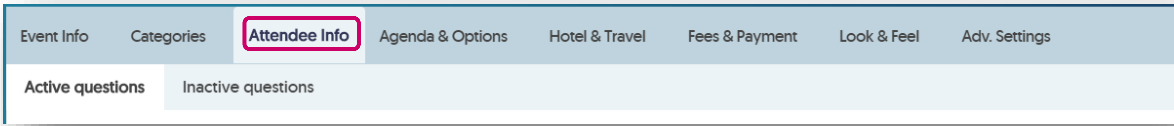
The **Required** column indicates whether it is mandatory for registrants in this category to answer the question(s). Tick or un-tick any questions that require a mandatory answer or select the edit icon to specifically allocate attendee categories who must respond to this question. When the question is only required (i.e. mandatory) for some registrant categories, it displays as "partial" in the Required column on the **Active Questions page**.

⚠	For a better overview of what each attendee category will see (rather than going in to each question individually to change the visibility), within the registration module Settings; click the Categories tab; Item Visibility by Category dropdown arrow. Click the view icon to see an overview of the questions per category.

Changing Attendee Questions Visibility

The Categories will define the types of registrants that are available for registrations. The attendee info questions can be customized for each Category type.

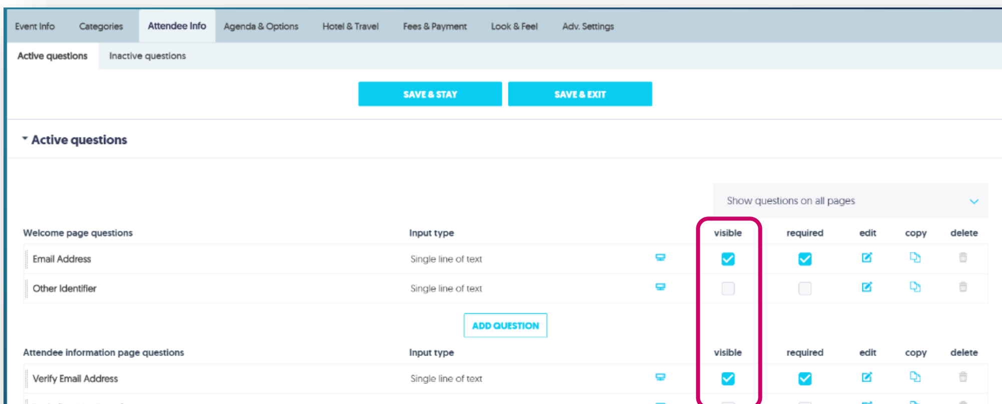
1 In etouches **registration module** select **Attendee Info**.



2 Listed is the *Active questions* is all of the currently available questions for the registrants.

> The default questions that appear on the Active questions page are defined by your system Administrator.

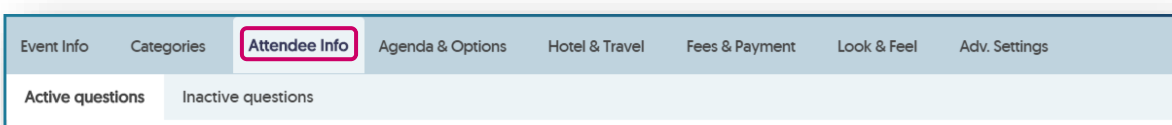
3 You can remove the visibility for questions by unselecting the option Visible next to the question.



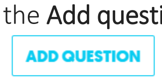
Adding Attendee Questions

As the client will need to know sizes for the golf shirt you will need to add the custom question shirt size for the registrants, this should be visible to the categories VIP and Attendee.

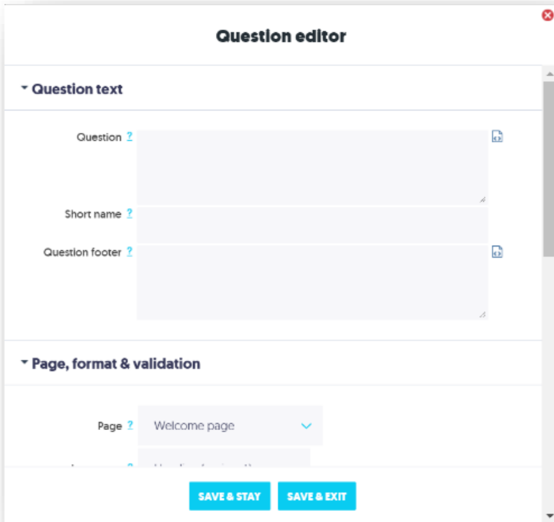
1 In etouches **registration module** select **Attendee Info**.



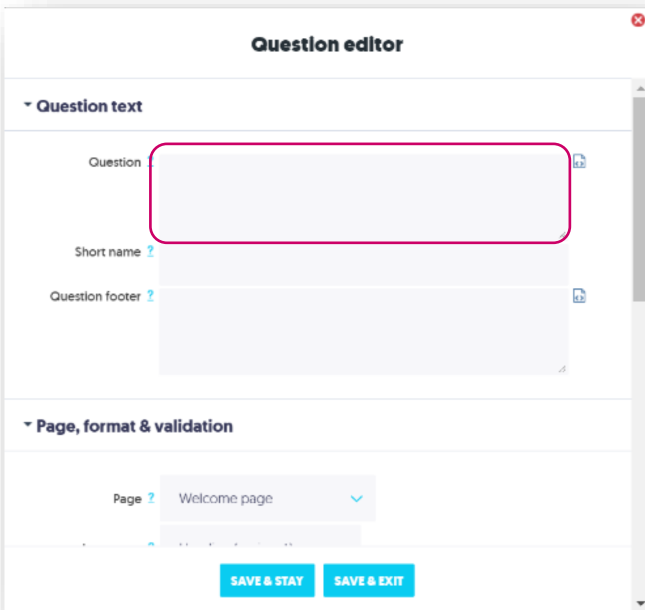
2 Under the relevant set of page questions press the **Add question button**.



3 The **Question editor** dialogue box will display.

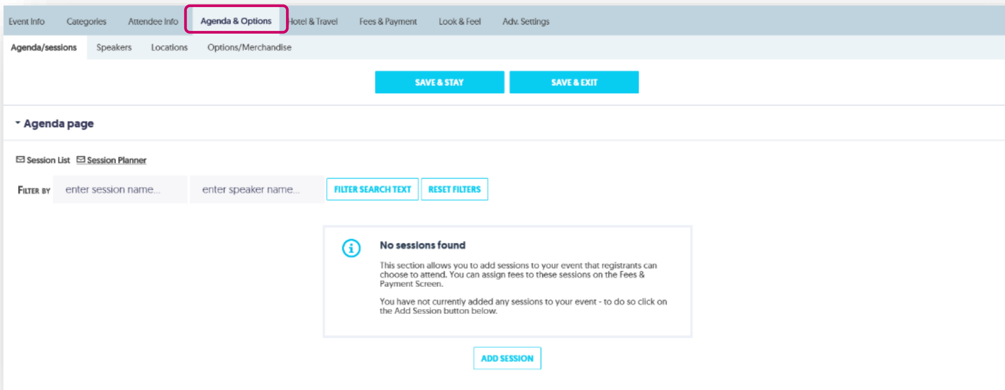


4 Type your question in the Question field.



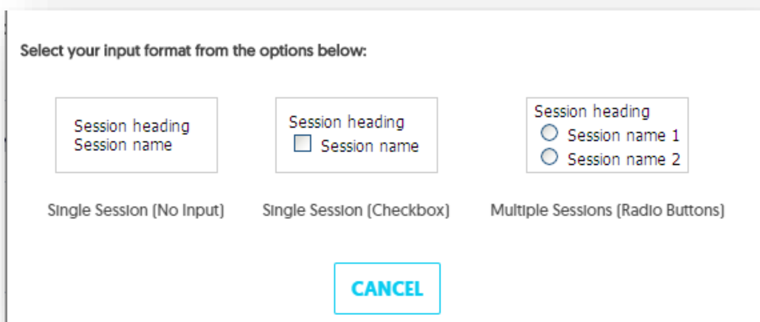
5 Select **Save & Exit.**

Agenda and Options



Agenda

The agenda page sets the available agendas for participants. There are several types of agenda items:



1. **Session Header (no input)**: when a session is set (required attendance)
2. **Single Session (checkbox):** when registrants are given the option to attend a specific session. For example:
    - **Session name –** Optional morning session for new members (registrants are given the option to attend by ticking the checkbox)
3. **Multiple Session (radio buttons)**: when registrants are given several different options to attend a specific session, and must select one.

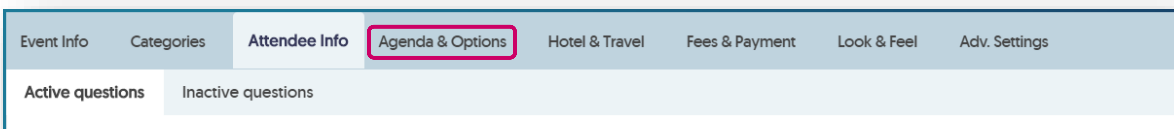
> If you are synching the agenda to Personal Agenda in the LOOPD app then it will only show agenda items that you have selected, so you will need to ensure that the agenda is set to checkbox with the default on rather than the session heading no selection.

Session Heading	(Name of the session) and sub sessions (if applicable)
Date	Date of the session
Start/End time	Start and end times of the session
Position the time	Choose whether time is to be displayed to the left of or above the Session header (Session name)
Visibility settings	Enable the session to be visible to all attendee categories, or selected attendee categories (select by ticking the Visible column)
Required column	Is ticked if the session is mandatory for all or any categories of registrant
Visibility by User type	Set Public Users and/or Admin Users. This means that the session is visible to Public users - those who register themselves; and/or Admin users – an internal registration function that can bypass any mandatory fields
Advanced Settings	If you wish for the Speaker and Description for this session to be visible in a pop-up window, click in Advanced Settings to amend this.
Restrict the registrant's selection	A minimum or maximum number of sessions that the registrant / registrant category can select.

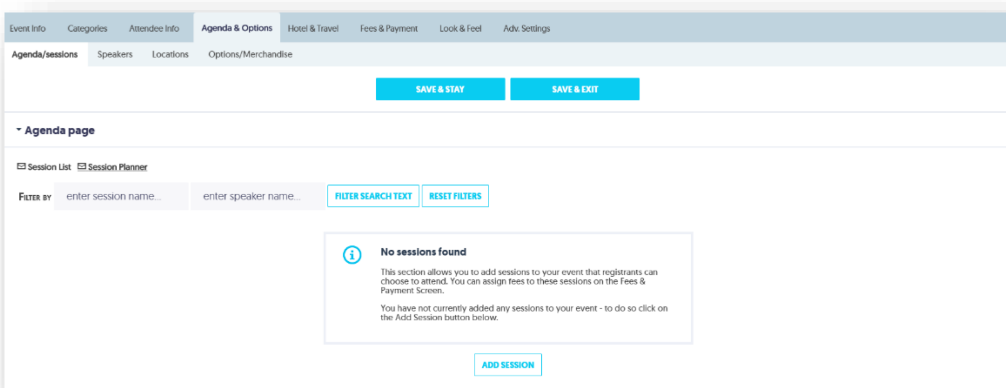
Create an Agenda

The Agenda and Sessions section of etouches will enable you to set up your event agenda, which can be shown and selected on the registration page. You will be able can also modify the different agenda visibilities based on the event categories.

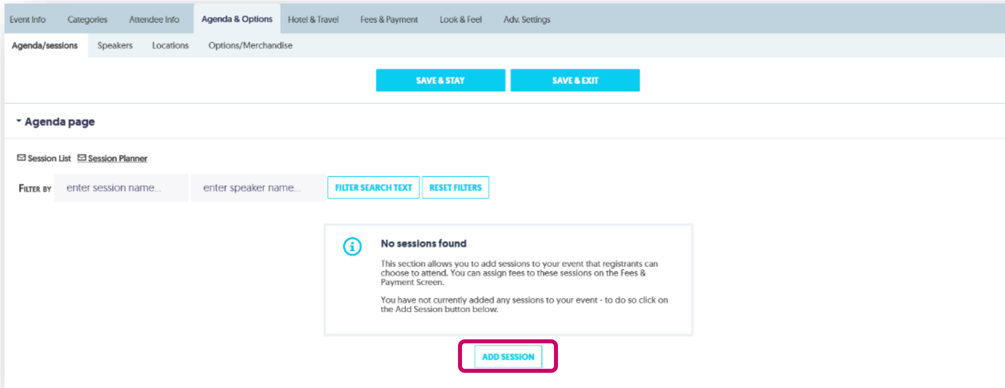
1 In etouches **registration module** select **Agenda & Options**.



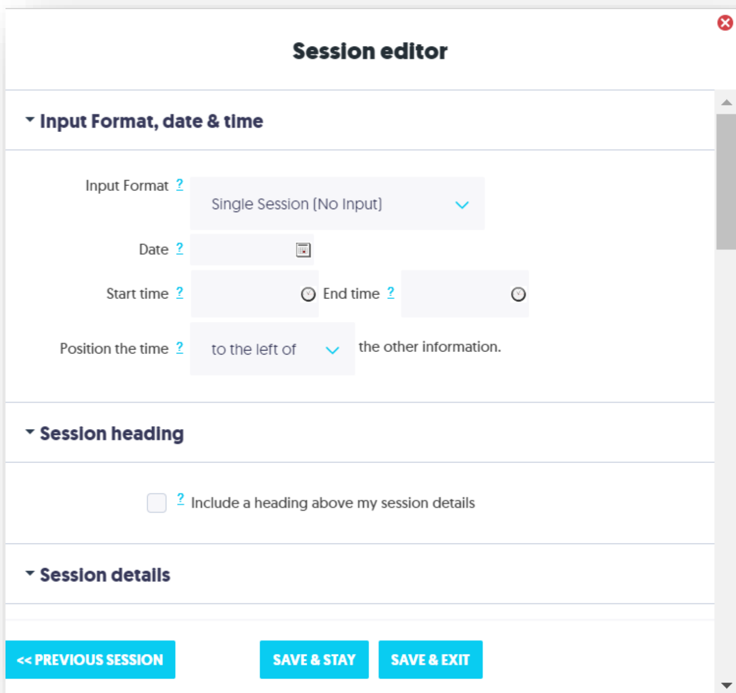
The Agenda & Options page will display:



2 In the Agenda/Sessions page, select **Add Session**



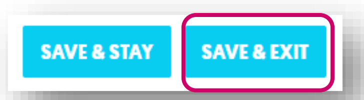
The **Session Editor** will display:



3 Set the following attributes:

Question Text	The question to be shown on the registration page
Short Name	this will appear in attendee records and reports where there is limited space
Question Footer	Any text you may wish to enter beneath the question – e.g. explanatory or instructional text
Page	Sets the page that the question will appear on (you can move questions between the Welcome, Attendee Info, Select Agenda, Options, Spouse and Payment pages)
Input Type	Sets the way you would like the registrant to enter the information requested. The options include: Hidden Field, Single Line of Text, Multiple Lines of Text, Single Checkbox, Multiple Checkboxes, Date (full), Date (day and month only), Time, Password, Upload File, Dropdown Box, Radio Buttons
Visibility Settings	Reference visibility and required set up above
Advanced Settings	Varies between question types, but include determining where the response is displayed, allocating merge codes to new question fields, intelligent formatting and response limitation / pre-approval
Conditional Questions	Questions that are asked only when a certain answer has been selected by a registrant. You can make the conditional question either visible or required when the registrant's answer is equal to the selected answer

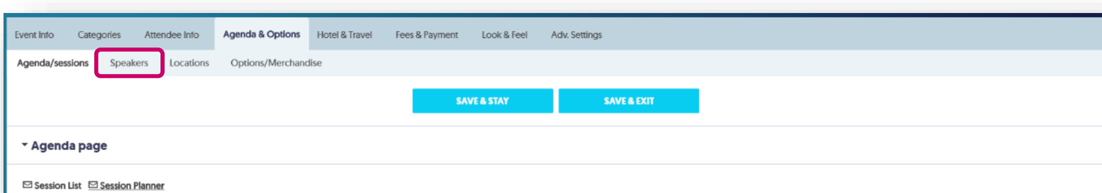
4 Click on **Save & Exit**



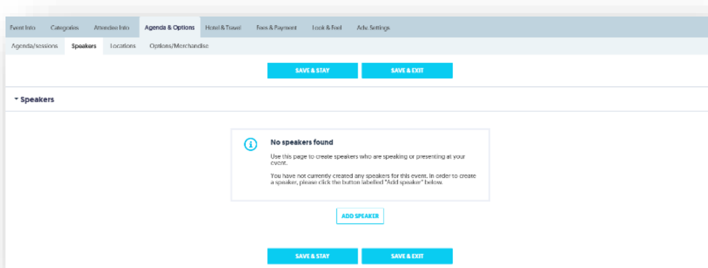
Speakers

You can either add the speakers before or after setting the agenda, in this instance we are setting them after. Speakers will be linked to events and attendees will be able to see the speaker profiles related to the sessions when they are registering.

1 In the **Agenda / Sessions** page select **Speakers**.

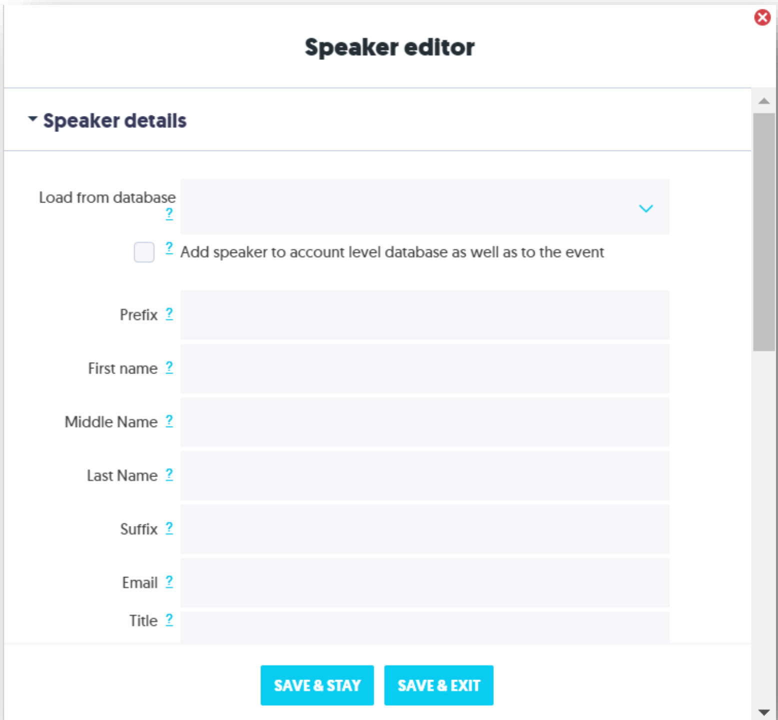


the Speakers page will become active



2 Select Add **Speaker**

The **Speaker Editor** will display:

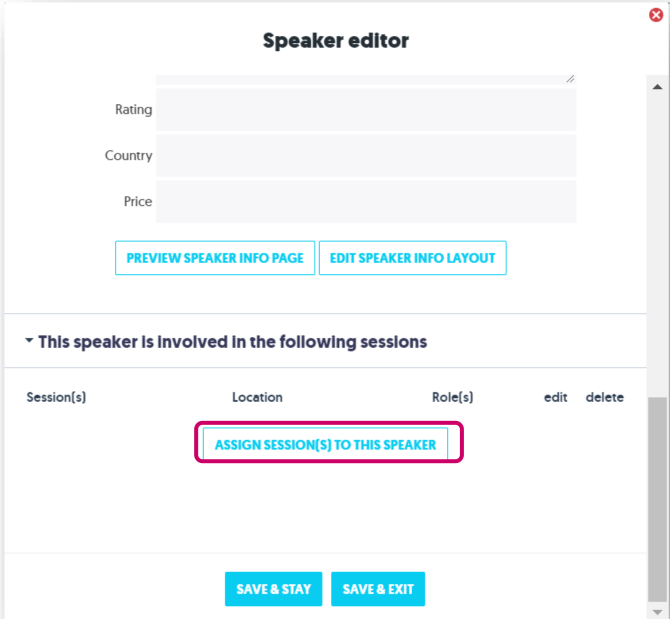


> If the Administrator has predefined Speakers in the Account Level System settings, you will be able to select this from the Load from Database option.

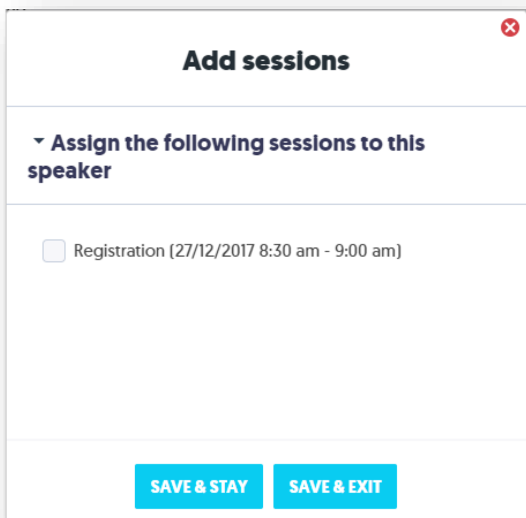
3 In the *Speaker* **Editor** set the following attributes:

Prefix	Speakers prefix.
First Name	Speakers First name.
Last Name	Speakers Last name.
Email	Speakers email address. By default, this is not shown to registrants.
Title	Speakers title. By default, this is not shown to registrants.
Company	Speakers company.
Image	An image of the speaker can be uploaded here.
Bio	This area allows you to enter a bio about the speaker.

4 Select **Assign Session(s) to this Speaker.**



The **Add Sessions Dialog Box** will open.



5 Select the relevant *Session* you wish to link the speaker to.

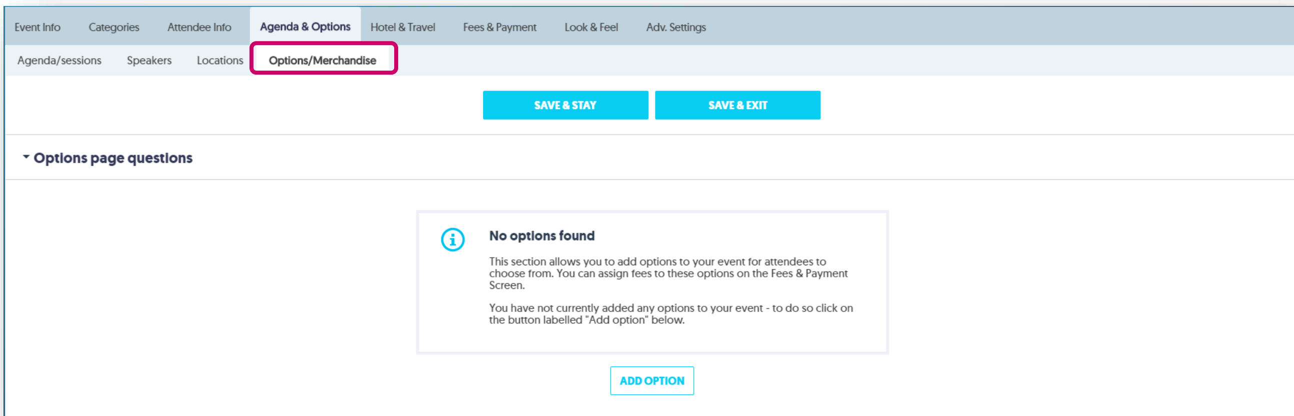
6 Click on **Save & Exit.**

7 From the *Speaker* **Editor**, select **Save & Exit.**
This Speaker will now be assigned to the Session and attendees will be able to view the speakers profile against the session when they are registering for your event.

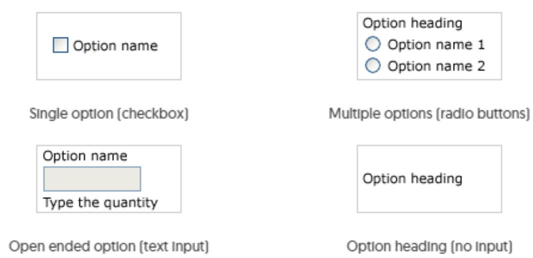
Options and Merchandise

The Options / Merchandise section allows you to add additional items that are not part of the agenda, or category, this can include social events, merchandise, exhibition space. These items will be displayed on their own separate page in the registration process.

As with categories and agenda sessions you can assign fees to these options on the Fees & Payment Settings if required.



There are several types of options available that can be set, these include:



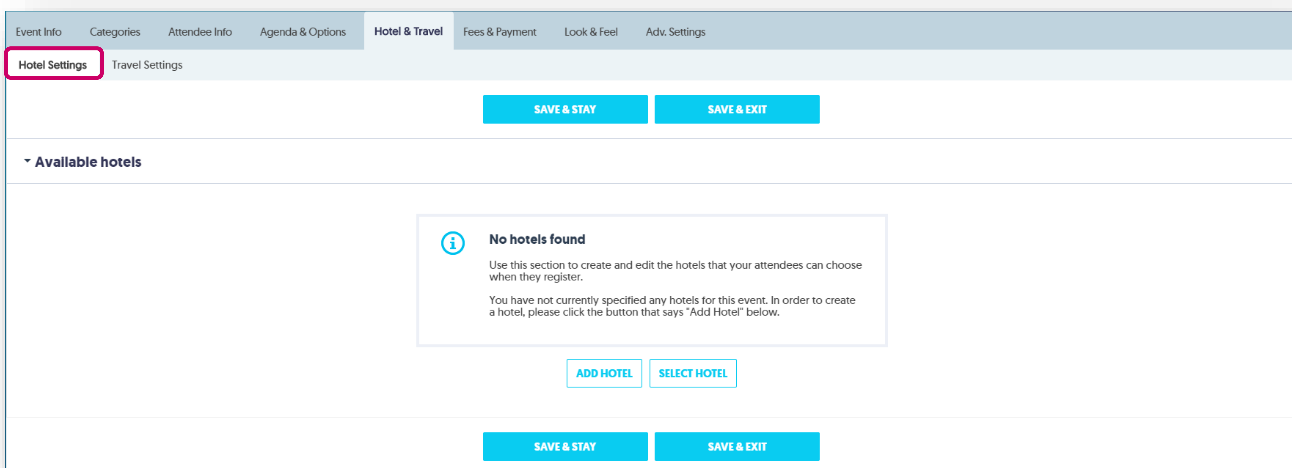
1. **Single Option (checkbox):** when registrants are given a choice whether or not to take up a single option. For example:
2. **Option name:** Will you require an airport transfer? (Here, registrants are given the option to request a transfer by ticking the checkbox)
3. **Multiple Options (radio buttons):** the registrant chooses one response from multiple options. For example:
   - **Option name:** What networking activity will you be participating in?
4. **Open-Ended Option (Text Field):** – when registrants are given an open ended option for them to fill out. For example:
   - **Option name**: What is your primary spoken language? _____ (the open-ended text field enables the registrant to enter their information.)

For each new option, you will be asked to enter the following attributes:

Option Name	Name of the extra item
Option Name on Badge	(if required)
Description	Text to describe this option to your registrants
Overall Maximum	Maximum quantity that can be selected by all registrants combined.
Maximum Registrants	
Individual Maximum	Maximum quantity that one individual can select
Message once max is reached	The option to show the number remaining before this option has reached its maximum
Visibility settings	Enables the Option to be visible to all attendee categories, or selected attendee categories (tick the Visible column)
Required column	Ticked if the option is mandatory for all or any categories of registrant
Visibility by User type	Choose Public Users and/or Admin Users. This means that the option is visible to Public users - those who register themselves; and/or Admin users an internal registration function that can bypass any required fields
Conditional questions	For example: Option Name – Do you wish to order a t-shirt? Options - ○ Yes Please advise your t-shirt size ____ (this is the Conditional Question) ○ No
Advanced Settings	If you wish the Description for this session to be visible in a pop-up window, click on Advanced Settings

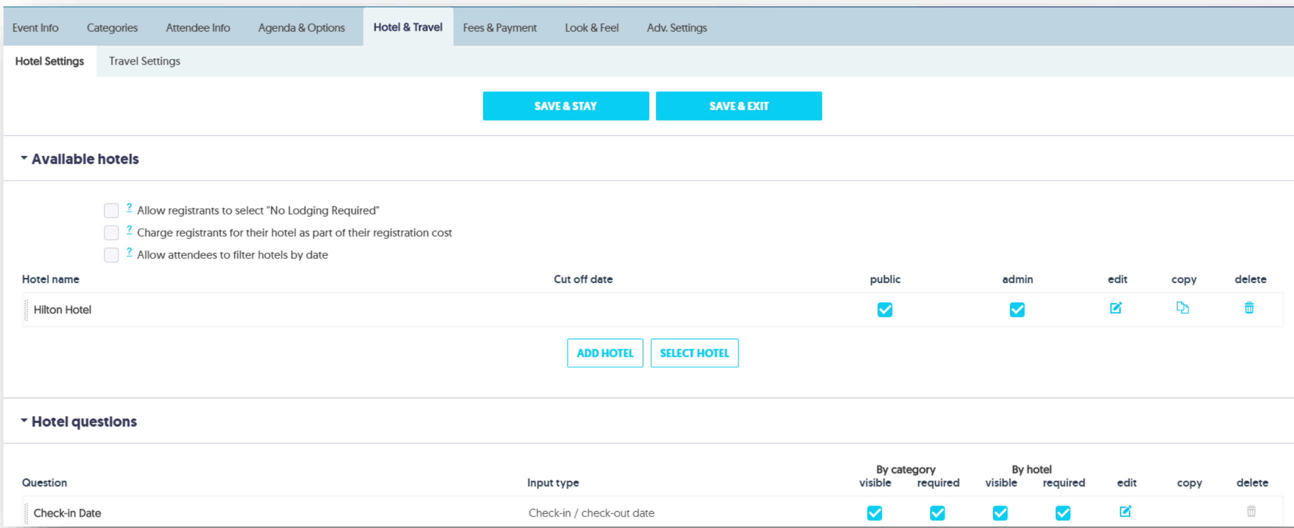
Accommodation & Travel

The Accommodation & Travel section enables you to set up accommodation and travel options for the registrants to select during the registration process.



Hotel Settings

Hotels enables you to set accommodation settings for the registrants during the registration process. These hotels can then be managed by the Hotel functionality and Accommodation reporting.



Hotels enables you to set accommodation settings for the registrants during the registration process. These hotels are then managed by the Hotel functionality and Accommodation reporting.

When you select the Add Hotel button, you will have the option to fill in the details for a new hotel, or select a hotel from a pre-loaded list (see your account setup for pre-loaded hotels).

To give registrants the option not to choose accommodation, select the checkbox Allow registrants to select "No Lodging Required".

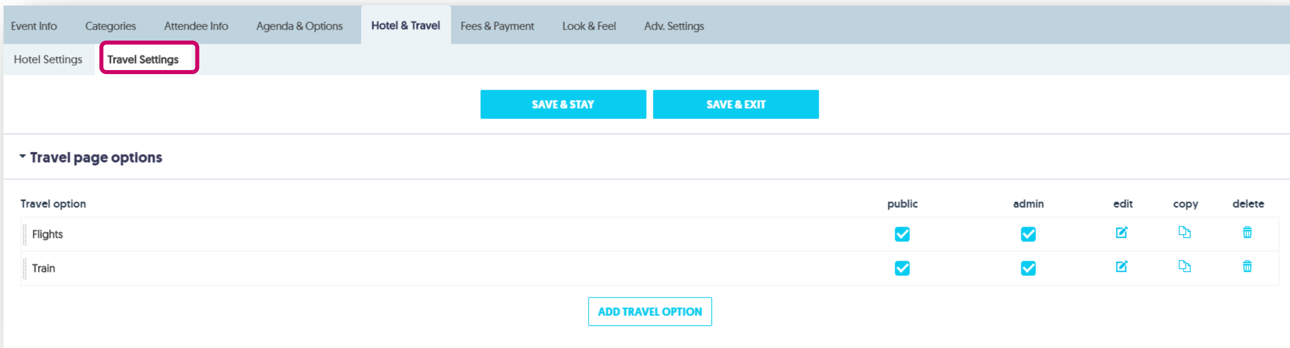
etouches have provided a number of pre-loaded questions to display on this page, following on from the hotel selection. These include

- Check In Date
- Check Out Date
- Single or Double Occupancy
- Bed Preference
- Smoking Preference
- Additional Info / Requirements
- Credit Card Number

You may wish to edit these, amend their visibility or mandatory status, or add questions as required. Question setup processes for the Accommodation section are the same as question set up processes on the Attendee Information Page.

In addition to category visibility, you also have the option to select a question/s to be visible or required for specific hotels only.

Travel



Here you will have the option to create a new travel option. You may wish to create a number of travel options:

e.g.

- **Option 1:** Will you require flights to/from the event?
- **Option 2:** Group flights have been booked for XX Date (inbound) and XX Date (Outbound). Please select this option if you will travel with the group on these dates?
- **Option 3:** Should you require alternative flight options, please select this option and make your request
- **Option 4:** I do not require travel

Click on the **Add Travel Option** button. In the pop-up window, enter:

Travel Option Name	Name of travel option (e.g. flights; coach)
Travel More Info Link	(if applicable) – e.g. link to airline or travel agent website being used for delegates of this event
Visibility Settings	The visibility settings enable the Travel option to be visible to all attendee categories, or selected attendee categories (select by ticking the Visible column)
Visibility by User Type	choose Public Users and/or Admin Users. This means that the option is visible to Public users - those who register themselves; and/or Admin users – an internal registration function that can bypass any required fields

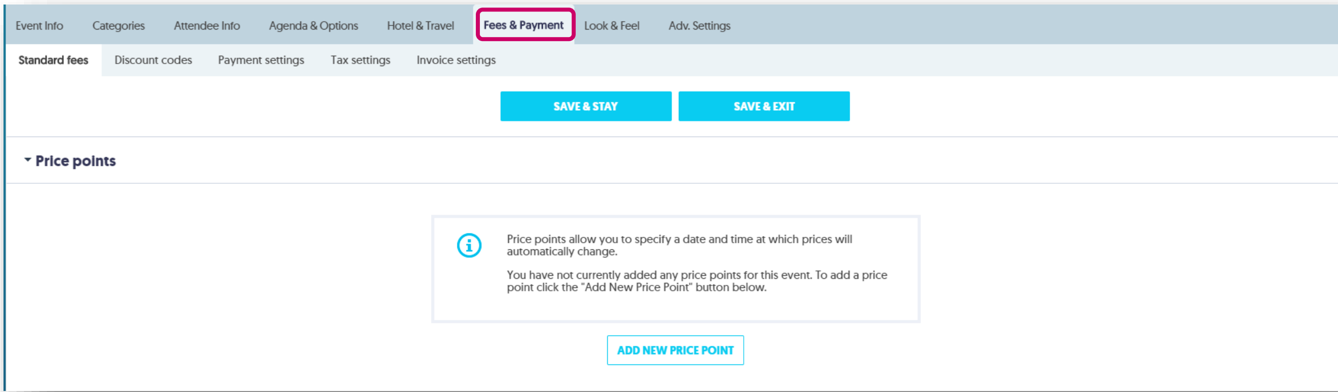
etouches have provided a number of pre-loaded questions to display on this page, following on from the hotel selection. These are:

- **Preferred Airline** (Outbound and Inbound)
- **Preferred Airport** (Outbound and Inbound)
- **Departure City** (Outbound and Inbound)
- **Departure Date** (Outbound and Inbound)
- **Departure Time** (Outbound and Inbound)
- **Departure Time of Day** (Outbound and Inbound)

You may wish to edit these, amend their visibility or mandatory status, or add questions as required. Question setup processes for the Travel section are the same as question set up processes on the Attendee Information Page: In addition to category visibility, you also have the option to select a question/s to be visible or required for specific travel options only.

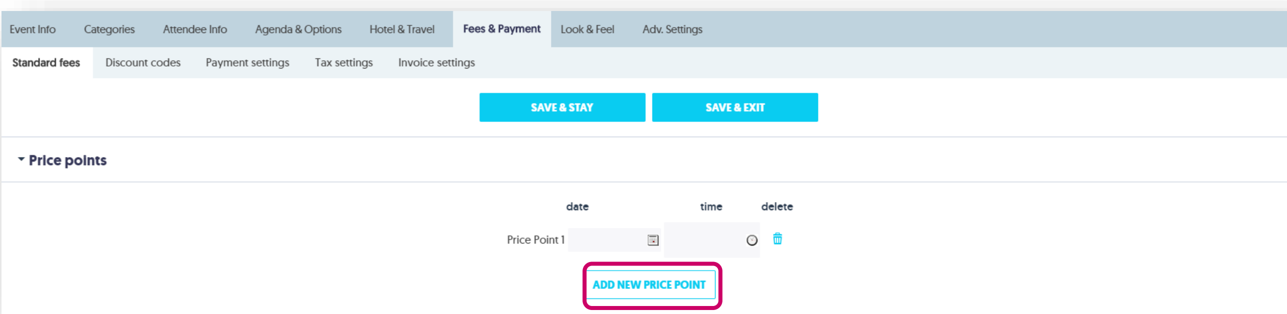
Fees & Payment

The fees & payments page allows you to apply fees to categories, sessions and options. It also allows you to set price points such as 'early bird' prices, discount codes, tax settings and set-up your invoice template and settings.



Price Points

Price points allow you to specify a date and time at which prices will automatically change. If this is relevant for your event, click the **Add New Price Point** button and fill in the date and time when the new price point comes into effect. This is particularly useful for setting up early bird registration fees.



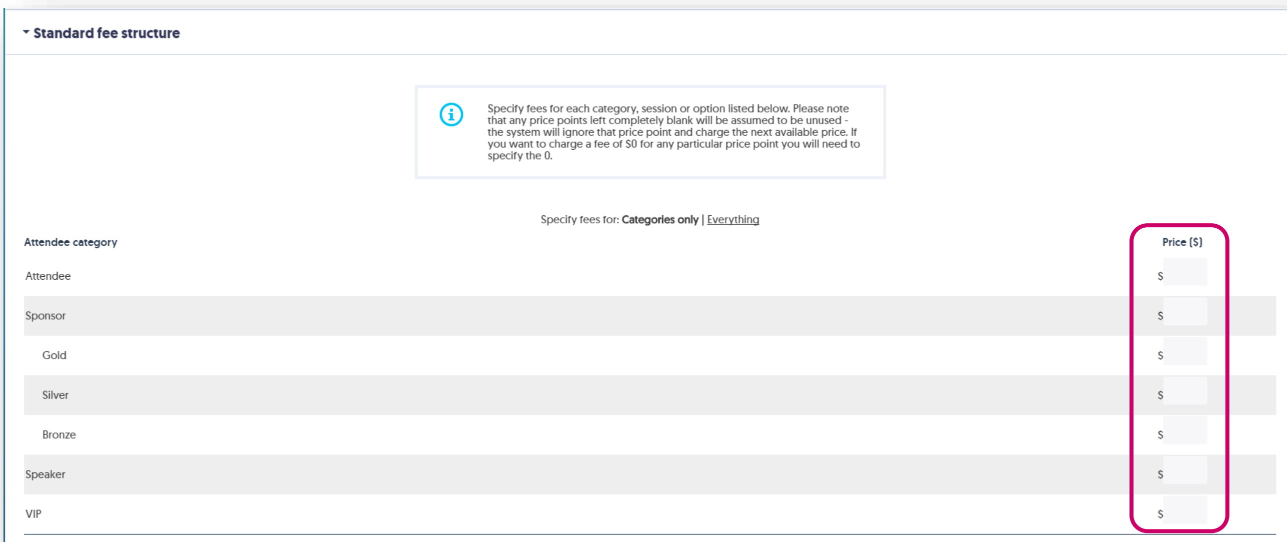
Standard Fees

To add a fee, simply enter the amount against each category:

Standard Fee Structure

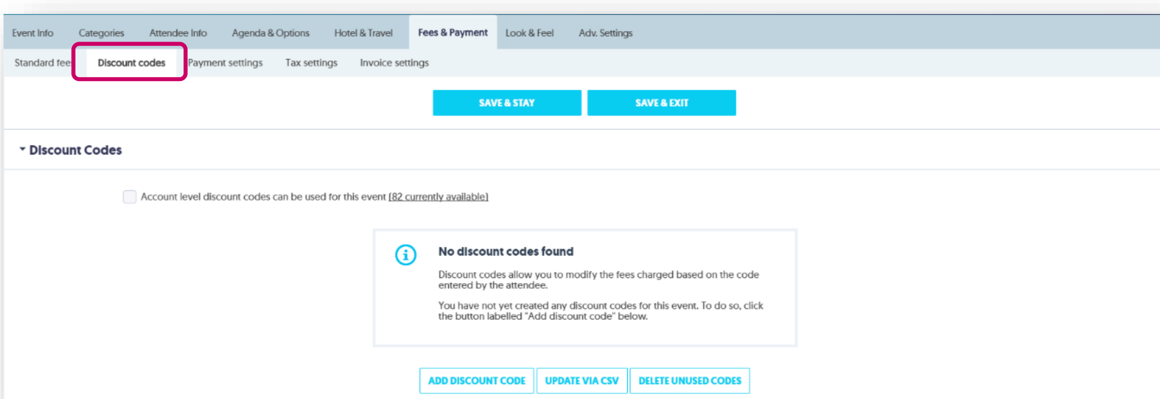
Specify fees for each category, session or option. Any price points left completely blank will be assumed to be unused - the system will ignore that price point and charge the next available price

- Registration Fees - specify price by category
- Session Details – specify price by category
- Option Details – specify price by category



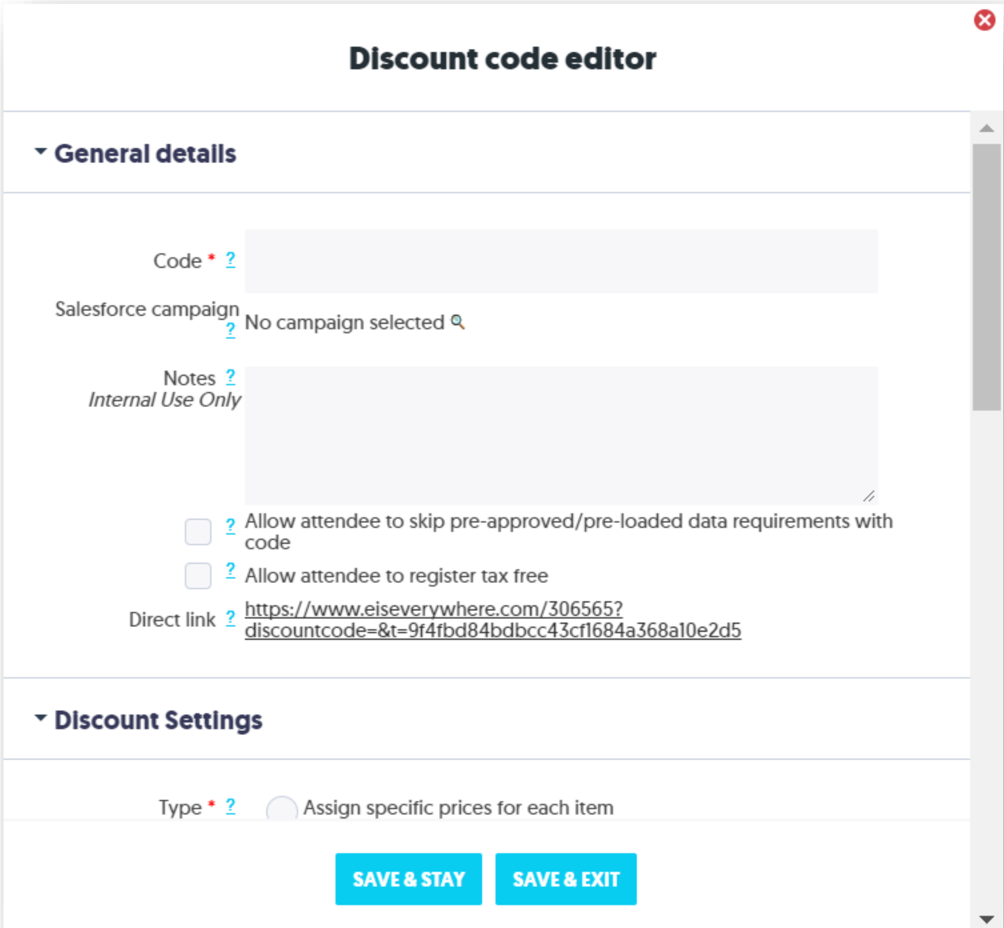
Discount Codes

To add discount codes to the fee payment section, select **Fees & Payment > Discount Codes**. Discount codes allow you to modify the fees charged based on the code entered by the attendee.



To create a discount code for your event, click the **Add New Discount Code** button.

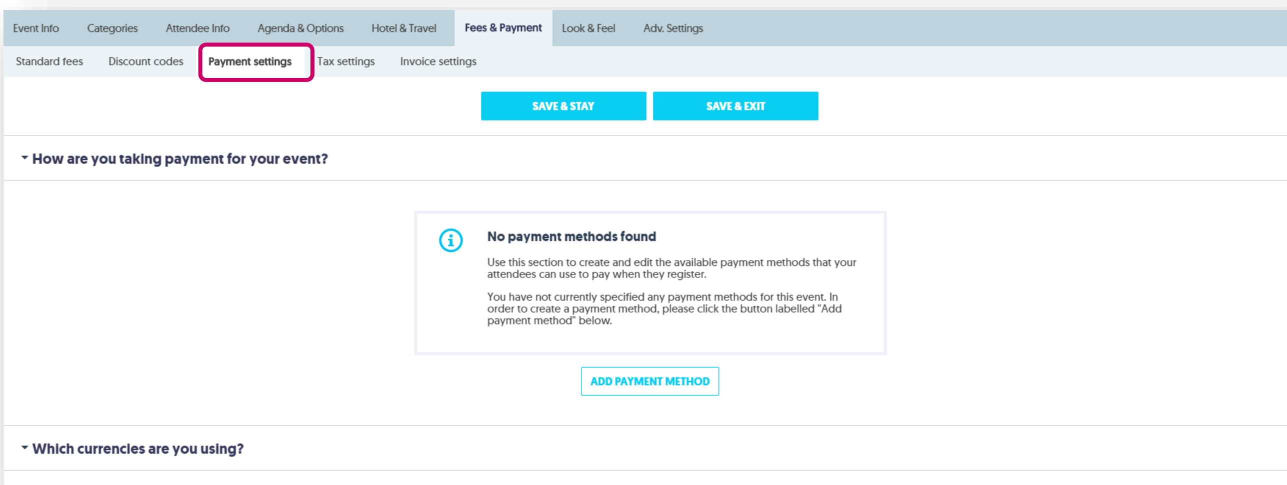
The **Discount Code Editor** will display:



- Enter the code name – this is the code that your registrants will type in to receive the discount you are offering
- Enter Notes about the code name – for internal purposes, to help you identify the discount code.
- If required, click the field to Allow attendees to skip pre-approved/pre-loaded requirements with the code. This field gives this discount code the ability to skip specific requirements that you have put in place, such as preventing people from registering with certain email addresses entered in the pre-approved data
- Discount Settings – There are three types of discount codes that you can offer to your registrants:
  - Specific prices: allows you to specify exactly what you want to charge for any chargeable item in your event.
  - Percentage discounts: allow you to automatically discount prices by a set percentage.
  - Fixed discounts: allow you to automatically discount prices by a set amount

- Availability:
  - Use the Maximum Attendees box to specify the maximum number of attendees that can use your discount code. Once that number of people have used it then it will no longer be available to new delegates
  - Use the Available From and Available To fields to choose the specific date that you want the discount code to be available from/to
  - Only available when at least ___ attendees are already registered in a group. Here, you choose to have the discount code only work when a certain number of attendees are already registered in the group
  - Can be used once for every ___ attendee(s) in the group. Here, you choose for the discount code to be available for a selected person based on the order in which the attendees register
  - Availability By Attendee Category – choose whether the discount code is available to all Attendee Categories; only to specific attendee categories; or available when No Category has been selected.

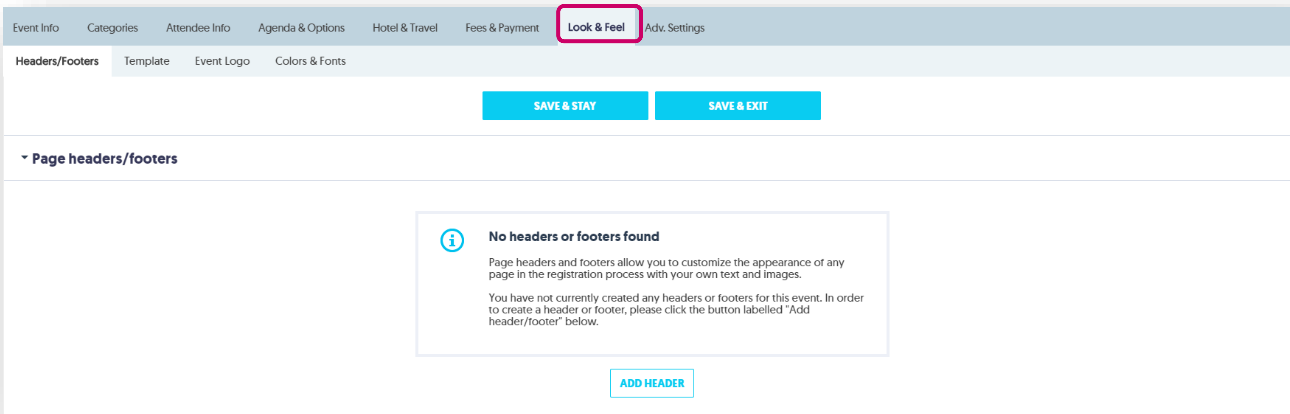
Payment Settings



Payment Settings proceed to **Fees & Payment > Payment Settings**. Within this section you have the option to specify your Currency (multiple currency types can be set simultaneously), Payment Methods, Terms and Conditions, Cancellation Policies, Privacy Policies, Payment Instructions and Receipt Notes.

When adding multiple currencies, you can select to choose either a floating or fixed exchange rate.

Look and Feel



Within this section you will have the opportunity to customize the look and feel of the web page in the following ways:

Headers & Footers

Page Headers and Footers allow you to customize the appearance of any page in the registration process by creating specific text and image blocks to appear at the top, bottom and sides of the registration page.

To create a header or footer select the Add Header/Footer button and complete the following information:

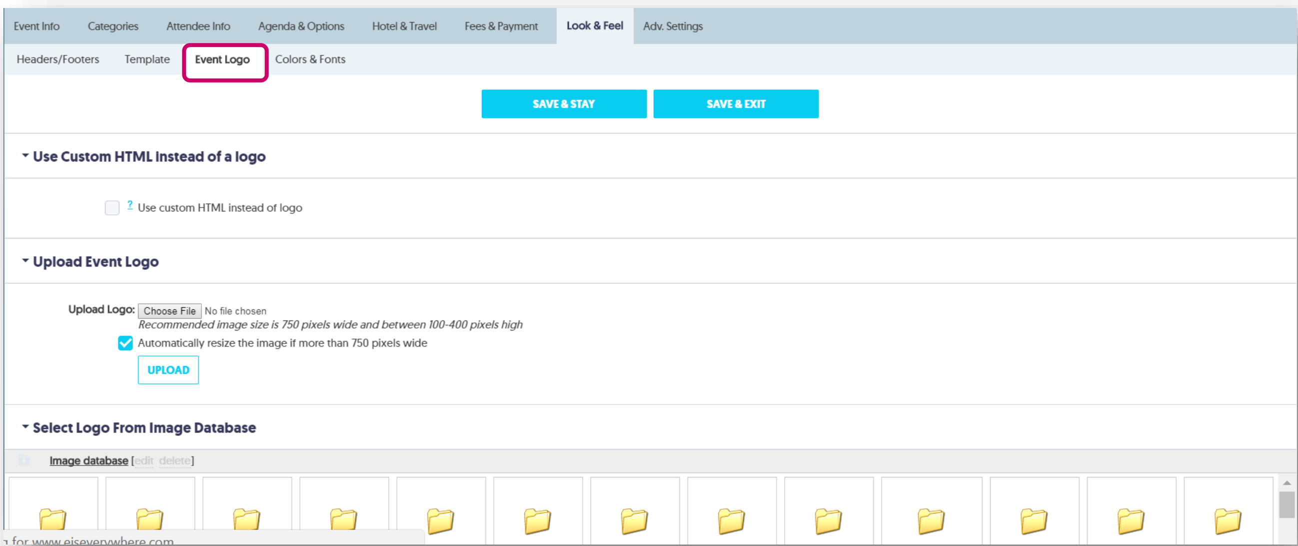
- Appears on: Select whether you wish the header/footer to appear on each registration page (global – all pages), or on selected registration pages (choose from dropdown menu)
- Type: Choose to create a Page Header, Page Footer, or Left Side Bar or Right Side Bar
- Content: Using the edit button enter the content that should appear on the header/footer/side bar. Note: this can include text, images or any content you require. Merge Fields can also be added here, e.g. */eventname/* which draws the information already entered elsewhere within registration module, such as from the registration module Basic Info fields. Click on the View Merge Fields button for reference
- Visibility Settings: choose the visibility of the header/footer/side bar by User Type, Attendee Category, Registration Status, or Lodging Status.
- Within this section you can also create Custom Pop-up Windows. To do this, select the Add Custom Pop-Up button. In the pop-up window, choose the Name and Content; and internal Notes, if required.

Template

The Look & Feel Template section allows you to select a predesigned template from your account database. Select a template from the dropdown list of templates that are available on your account. The Template Preview enables you to see how it will look.

> If you are using a Template, then you cannot change the colors and fonts.

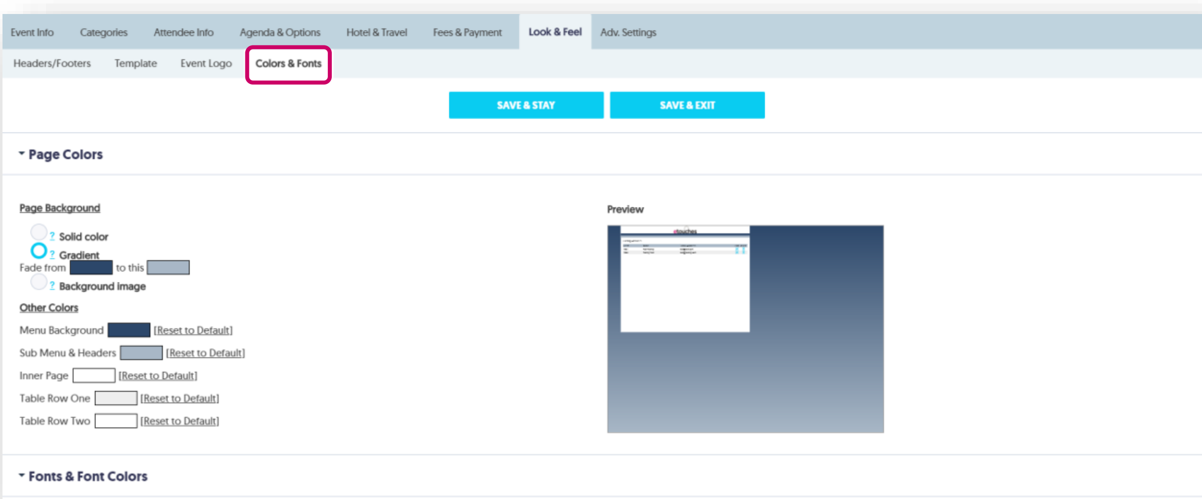
Event Logo



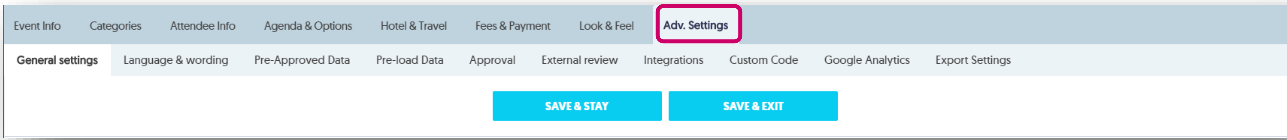
Upload an Event Logo or Banner – recommended image size is 750 pixels wide x 200 pixels high.

Colors & Fonts

In this section you can select the colors and fonts used throughout your site. You can also change the button style. Click Save & Stay or Save & Exit when finished updating each of these sections.



Advanced Settings

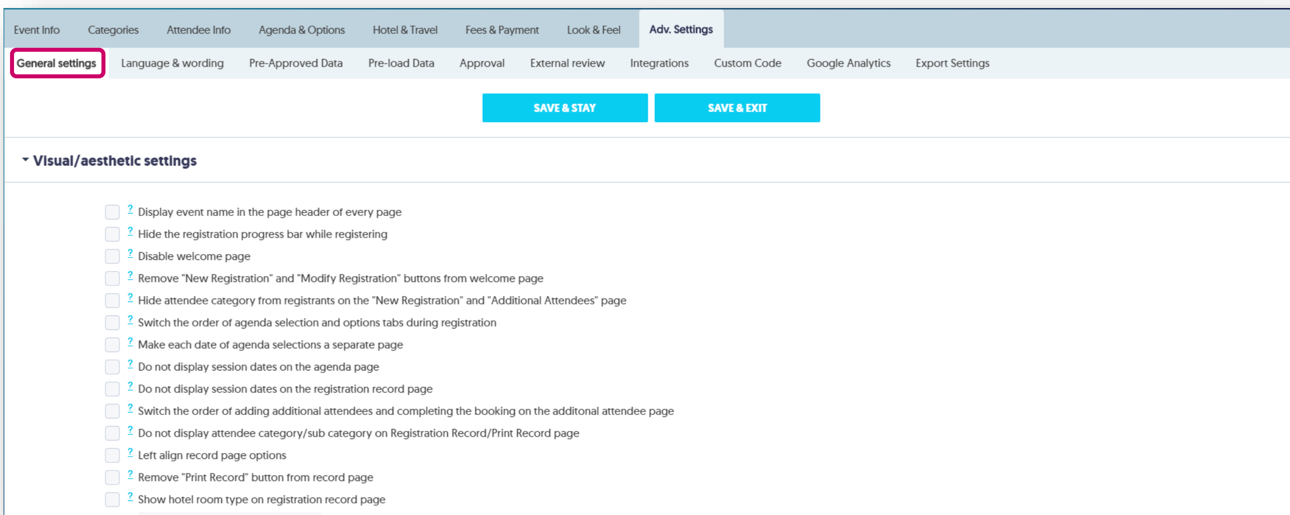


To further customize your registration module functionalities, select the Advanced Settings tab. Settings available in this section include:

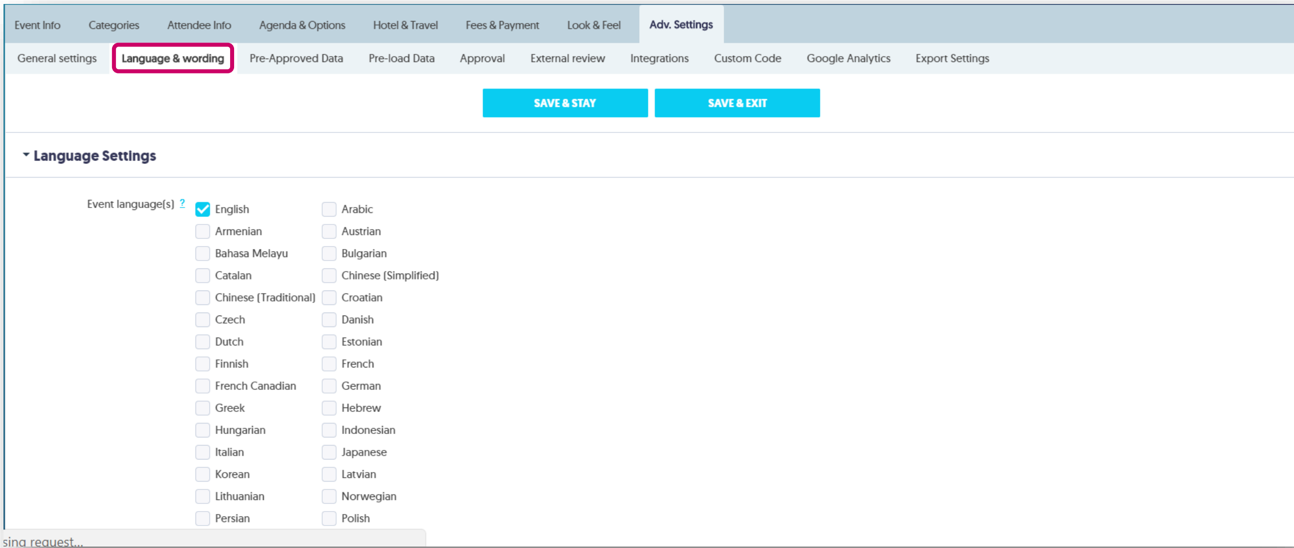
General Settings

Create specific rules within registration module for your event, including:

- Visual
- Other/Miscellaneous Settings



Language & Wording

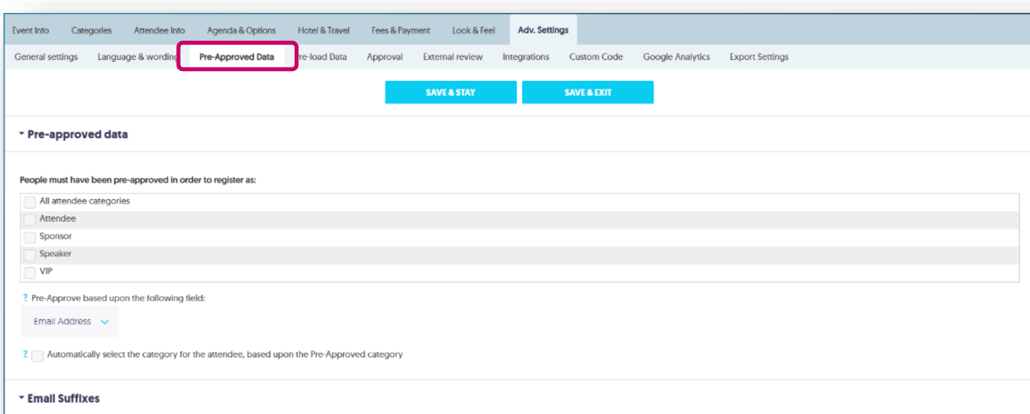


Language and wording allows you to choose:

- the Event Language(s); and
- Customize the standard System Text, which can be changed on an event-by-event basis. This includes the system standard text for additional languages.

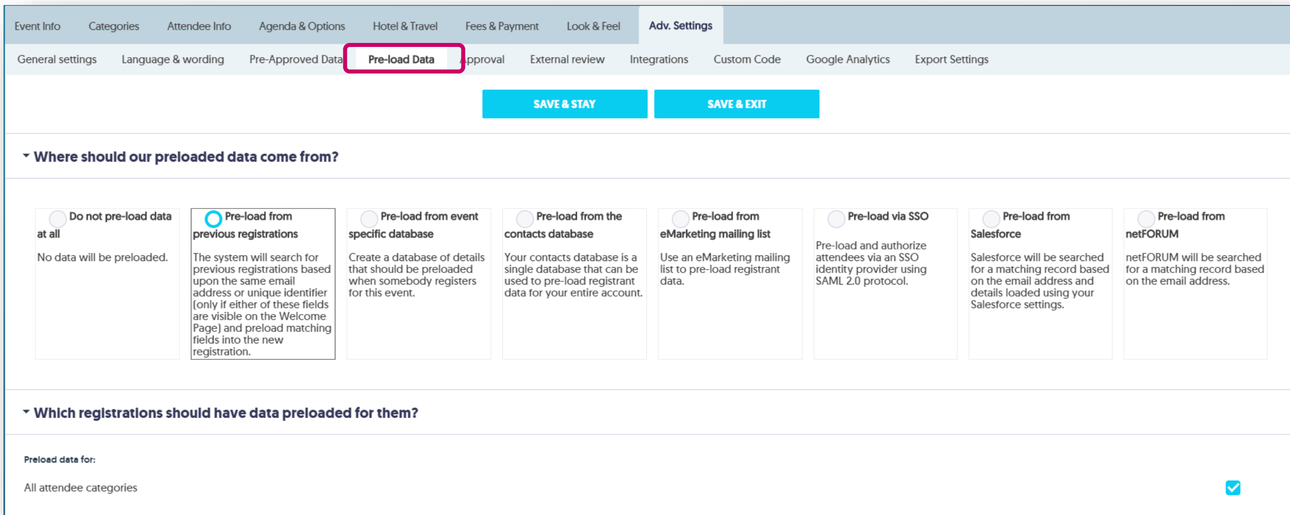
(To change the default text, hit the Customize button next to the text you want to change. Where default text has been changed, this will appear in red in the Standard Text column within Language and Wording. Remember, changing the text here will change it everywhere it appears on your registration module site. You can see the page(s) on which the text is used by looking at the checkboxes in the Standard Text table). You can view only the text that appears on a certain page by selecting from the dropdown menu on the Show me text that appears on field.

Pre-Approved Data



Only allows attendees who have been pre-approved for this event to register for the overall event, or specific categories. Click on ‘Edit Approved Attendees’ button for all categories or for the specific category required, and import the information from either a text field or CSV Excel File. The pre-approved data is typically based upon the Email Address field as this is a unique identifier. If then, for example, John Smith wants to register, when he enters his email address (or another unique identifier), he will be allowed to complete his registration. If someone whose data has not been entered into etouches tries to register, they will not be able to do so and will be shown an error message.

Pre-Loaded Data



Where information about guests is known prior to guests registering, this information is pre-loaded via a .CSV Excel File or text file. This information will appear as pre-populated fields during those guests’ registration process.

The .CSV layout/format should be as follows:

- Column A Header = Email Address or first Attendee Info question
- Colum A Content = Attendee Email Addresses or known responses to first Attendee Info question
- Column B Header = Second Attendee Info question
- Colum B Content = Known responses to second Attendee Info question

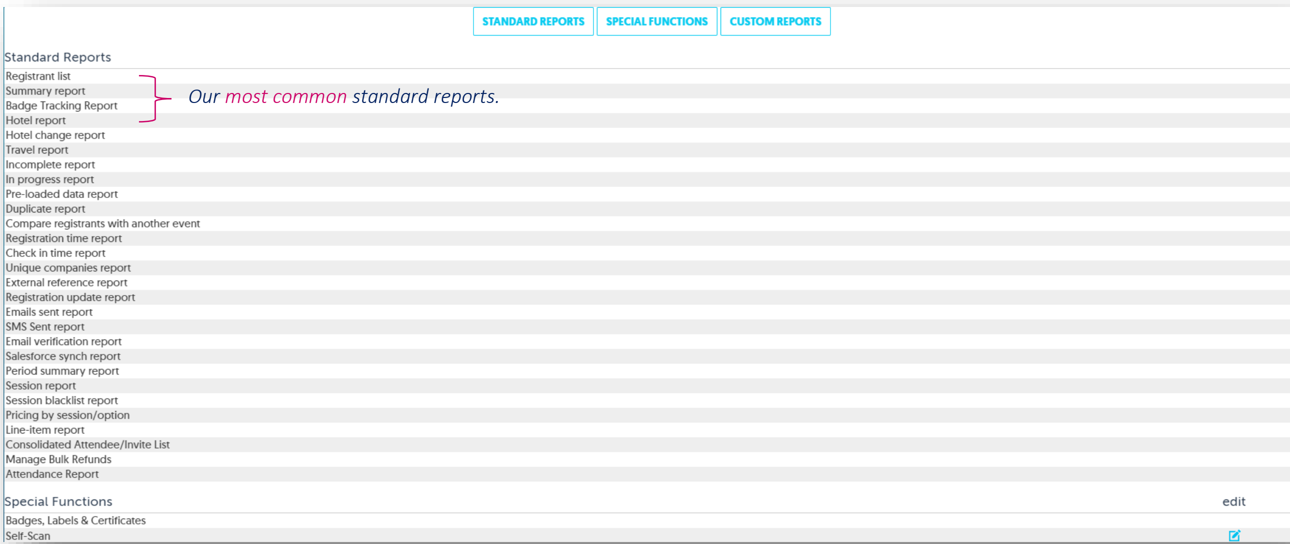
Continue on in above format until all questions and responses have been compiled

There should be one column heading for each attendee info question, even if the rest of the column content is blank.

Reports & Functions

Admin and Reporting functions are accessible via the registration module side bar when in the registration module for your event only. The main functionalities here are outlined below:

Reports & Functions



Reports

This function allows you to select from a number of Standard Reports, Special Functions and Custom Reporting Options. These include:

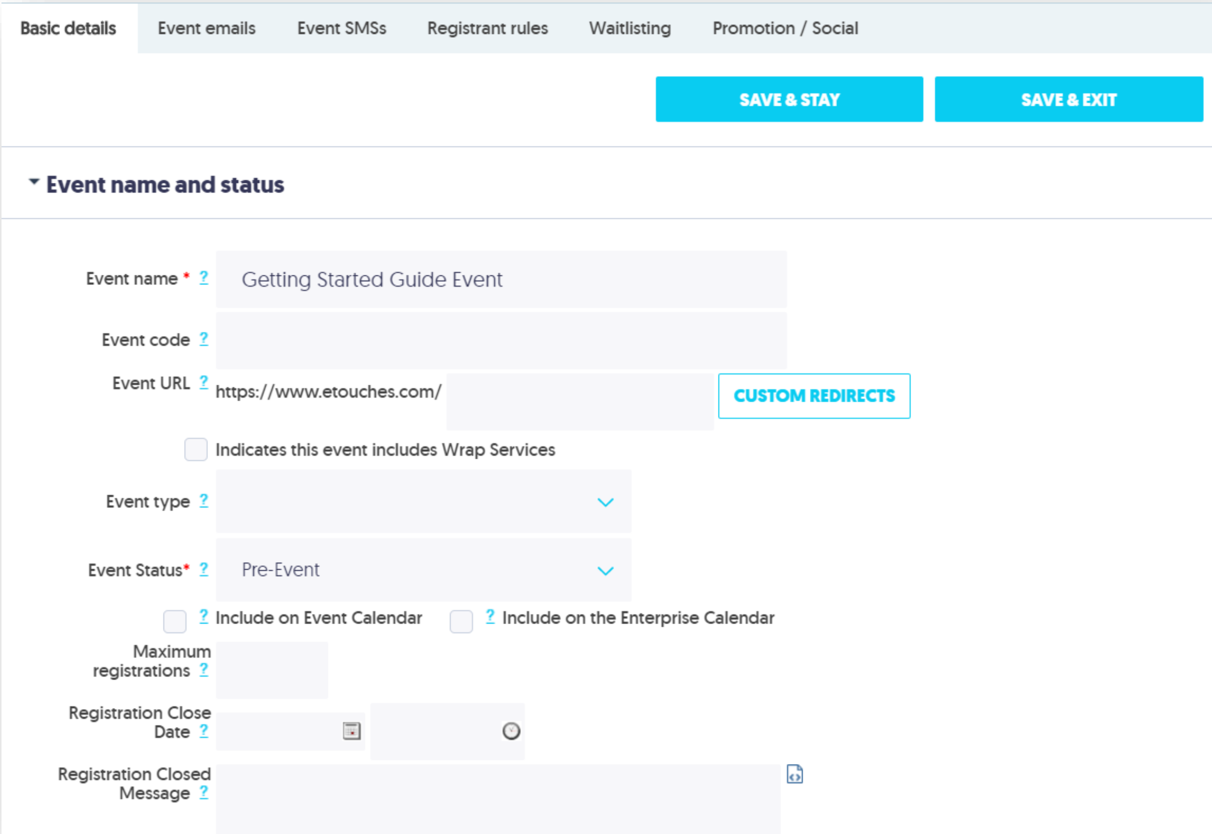
Report	Details
Registrant List	A detailed list of all individuals registered for your event. This list is searchable, filterable and columns can be selected to match your requirements. There is also a drop down list of functions you can apply, at the bottom of the report.
Summary Report	A summary overview of details of your event. This is a drill down-able report that allows you to click on sections to show you further details of registrants for that section.
Hotel Report	A list of Hotel Names, cut-off dates and registrant numbers by hotel. This is a drill down-able report that allows you to click on Hotels to show you further details for specific hotels.
Travel Report	A list of registrants by travel options, that can be broken down by category, and allows for focus on specific travel options.
Incomplete Report	A list of people who have started the registration process but have failed to complete the process, and have been logged out of the system. This list is searchable, filterable and columns can be selected to match your requirements. There is also a drop down list of functions you can apply, at the bottom of the report.
In Progress Report	A list of people who are currently in the process of completing the registration process for this event. This list is searchable, filterable and columns can be selected to match your requirements. There is also a drop down list of functions you can apply, at the bottom of the report.
Pre-loaded Data Report	A list of registrants whose data has been pre-loaded using the pre-load data options in registration module.
Duplicate Report	A list of possible duplicate by email and name. This can be filtered by Registration Status.
Transaction Report	A list of payments that have been logged against etouches for this event.
Registration Time Report	Numbers of registrants that registered for the event broken down by month, day and hour. This report can be filtered by registration dates.
Unique Companies Report	Numbers of registrants broken down by company name. This is a drill down-able report that allows you to click on Hotels to show you further details for specific hotels.
Registration Update Report	A list of updates made to registrant's details. This can be filtered to show specific updates within a specific date range.
Emails Sent Report	A list of emails sent via the registration module module to registrants for this event.
File Upload Report	Summary of all the files that have been uploaded by registrants' during the registration period, which you can then download via this report.

Special Functions

Special functions contain additional administration features that can be used with the Registration process. Special functions include:

Report	Details
Badges, Labels & Certificates	Use this section to create your badges and labels. Select Create Badge, input your badge stock, font, images, barcode data, text, registrant data and Save & Exit. You will then have the option to Run, Edit or Copy this badge. When you select the Run option you will then be asked to specify which attendees in the database you want to generate the badge for.
Self-Scan	Enables the Self-Scan Facility – whereby scanner units attached to an etouches enabled laptop terminal can recognize attendee barcodes on confirmation letters and scan the registrant into an event as attended.
Administrator Check In	Enables a quick lookup window in the etouches database for registrant names and enables them to be checked as attended, cancelled or no shows.
Public/Self Check In	Enables a quick lookup window in an etouches laptop terminal for delegate to enter and search for their own name and check themselves into an event.
Sponsorship Sales	Links with eBudget to recognize Sponsor contributions as revenue against the overall budget.
Import Registrations	Allows you to import registrations in bulk without any forms completed online by the individual.
Clear Test Registrations	Allows you to clear all test registrations from the database once you are ready to go live with your event.
Clear Incomplete Registrations	Allows you to clear any incomplete registrations from the database at any time.

Going 'Live' with your Registration Site



The Event Status field on the **Event Info > Basic Details** tab will allow you to keep your site in pre-event (testing mode) and change it to Live when you are ready to start taking registrations. While you are in pre-event mode you can continue to complete test registrations on the site at no charge. Once you have switched to Live mode you will be charged for all registrations according to your etouches plan.

Throughout the testing process you may wish to use the Preview Event or Public Registration function from the registration module sidebar. The preview function will allow you to view each page of the site as it will appear to each various category type. The public registration function will allow you to experience the registration process as though you were a real time online registrant.

If your event is fee paying, ensure you have tested your Payment Gateway or Processor and this is tested and set to take live payments.

Before switching to Live, ensure that you have deleted all Test Registrations. This is done by clicking on the Reports & Functions item in the registration module Side Bar (visible when you are in the registration module module for your event only). Under the Special Functions heading, you will find the option to Clear Test Registrations. Select this option to clear the database and you are ready to start taking registrations!

Next Steps

Now you have completed the getting started guide you will want to know more about the etouches software and the 15+ modules available. The best way to do this is to access the support portal and read the how to guides and watch the instructional videos. Or you can book yourself onto an on-line training session where an experienced support technician will take you through the different modules.

Booking On-Line Training

etouches welcomes new and existing clients to be trained on all modules within the etouches suite. Weekly web based training sessions are available at days and times that are convenient for your region.

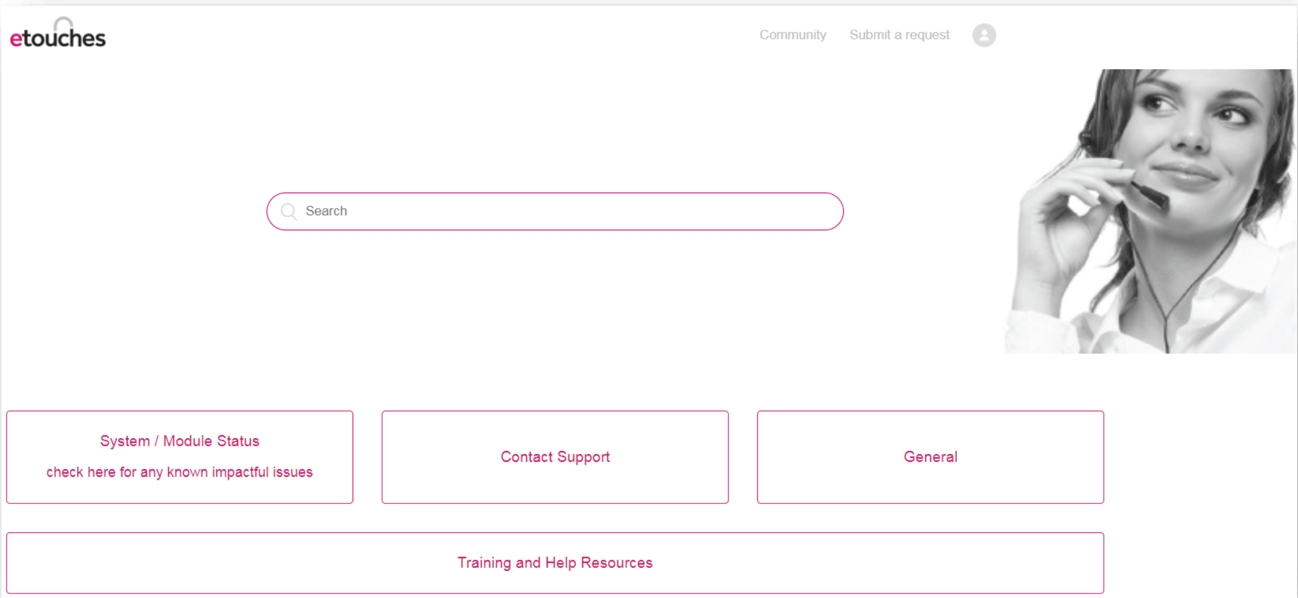
To book a training simple simply register at https://www.eiseverywhere.com/ehome/trainingsignup/ or contact Support on the details below.

Support and Contact Links

With etouches help is always on hand. You can use the support button in the etouches software which gives you access to the etouches support portal where you can search FAQs and watch instructional videos. Otherwise, you always have the option of calling our friendly support team or sending an email – we are open 24 Hours a day.

The Support Button

When logged into etouches, at the bottom of the **Hidden Menu Bar** [≡] you will find the support button. If you press this button it will take you into the client support portal. The portal allows you to search for support documents and how-to videos.



Contacting Support

We have a highly skilled team of professionals across all of our offices to help you. They will create tickets and follow up with you at any time of the day or the night. You can engage with them through our support portal where phone, chat, and email are available for your region.

Location	Phone
Americas	+1.800.516.4265
Asia / Pacific	+61 2 8213 4259
Europe / Middle East / Africa	+44 845 077 2803
Global Support email	support@etouches.com