

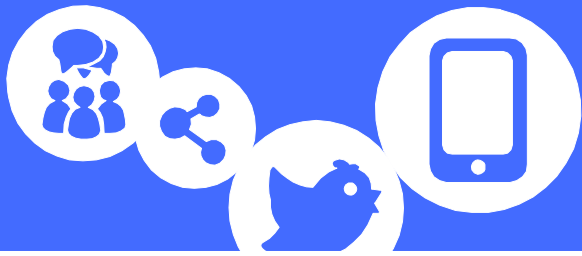


# How to:

## Import data into your event

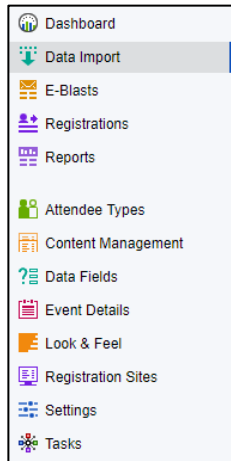
EventReference User Guide #13



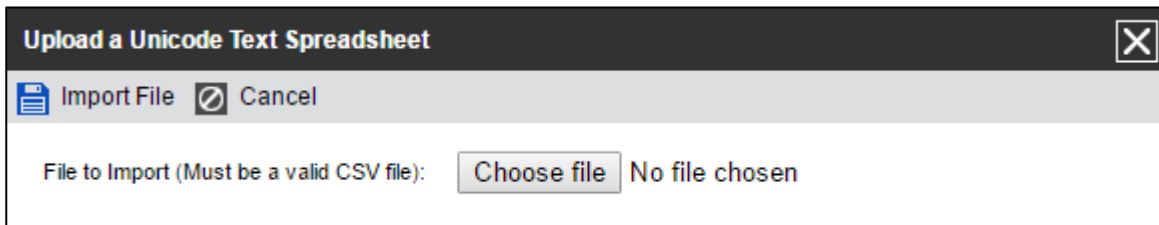


First, save your data. EventReference can import data saved as a .csv file type, however, to ensure any foreign characters are preserved and correctly imported, we recommend that you use Unicode Text (.txt).

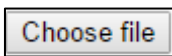
Click on the Data Import tab on the left.



Click



Click

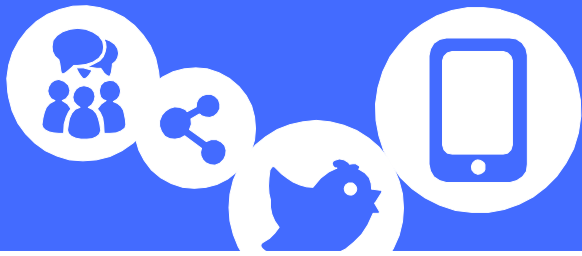


and then select the file you just saved.

Click



On the next page you will map the data fields in your spreadsheet to those in EventReference. The system will match what it can; you can change those or map any it doesn't get by clicking on the drop down list and selecting the relevant field.



Import File  Cancel Import

**Field Assignment**

ID	Foreign ID (Must be unique)	Preview Data
Firstname	First Name	Preview Data
Lastname	Last Name	Preview Data
Company	Company Name	Preview Data
Email	Email	Preview Data
Address 1	Address 1	Preview Data
Address 2	Address 2	Preview Data
Postcode	Postcode	Preview Data
Country	Country	Map Choices Preview Data
Attendee Type	Attendee Type	Preview Data

**Delegate Settings**

Attendee Type: Use Attendee Type column from Spreadsheet  Only apply to new records

Delegate Status: Please select a Delegate Status Type for this import  Only apply to new records

**Other Options**

Append rather than replace demographic responses

If your data has a unique ID, map this to 'Foreign ID (Must be unique)'.

If you are importing into a data field which has choices (e.g. Country as in the example above), you will be given an extra button which you must click this and follow the extra step, otherwise data may not be imported into this field.

Click **Map Choices**

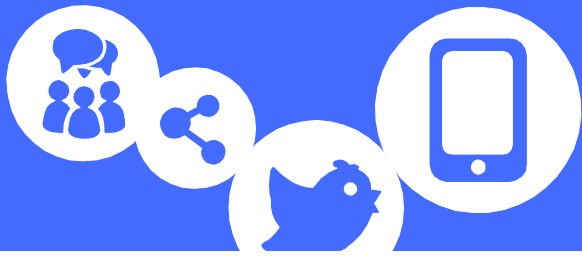
**Map Choices**

You can map choices from your spreadsheet to any valid choice for this question within EventReference. Matching choices will be automatically selected for you.

Spreadsheet Choice	Choice in Database
Australia	<a href="#">Australia</a>
France	<a href="#">France</a>
Germany	<a href="#">Germany</a>
Spain	<a href="#">Spain</a>
UK	<a href="#">Ignore this choice</a>
USA	<a href="#">Ignore this choice</a>

The system will match what it can for you. For any that it can't match, you will see the red 'Ignore this choice' text. Click on this and select the option you want the choice to match to. If you leave this as 'Ignore this choice', that choice will not be imported at all.

Click **Confirm Choice Mappings** when you have finished mapping your choices.



You can check what a column of data contains by clicking on [Preview Data](#)

If you are using a column with attendee types in, you should make sure this is mapped to the 'Attendee Type' field in EventReference. Then, in the Attendee Type drop down at the bottom, select 'Use Attendee Type column from Spreadsheet'.

Delegate Settings	
Attendee Type	<a href="#">Use Attendee Type column from Spreadsheet</a> <input type="checkbox"/> Only apply to new records
Delegate Status	<a href="#">Please select a Delegate Status Type for this import</a> <input type="checkbox"/> Only apply to new records

If all your data is for one attendee type, you can simply select this type from the dropdown.

Select the status you want the records to have from the Delegate Status drop down. This will usually be 'Registration Complete' however, if you are importing data to send a Smart Form, this needs to be 'Incomplete Imported Pre-registration'.

Once you are happy that everything is mapped as you want it, click [Import File](#)

If you have selected 'Use Attendee Type column from Spreadsheet', you will have another step to complete.

### Map Attendee Type

You can assign an attendee type from your spreadsheet to any attendee type that exists for your event. Any matching attendee types will be automatically selected for you.

Imported Attendee Type	Event Attendee Type
Delegate	<a href="#">Delegate</a>
Visitor	<a href="#">Please assign an attendee type</a>
Exhibitor	<a href="#">Please assign an attendee type</a>
VIP	<a href="#">Please assign an attendee type</a>

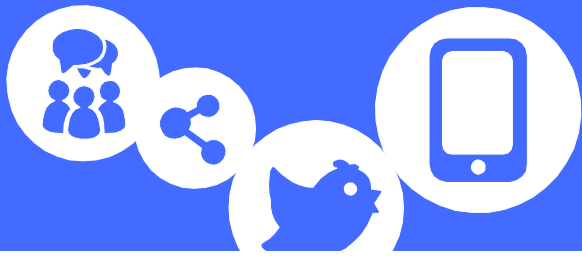
[Cancel](#) [Confirm Type Mappings](#)

You can quickly add a new attendee type here. Once added the new attendee type will be selectable above.

Add new  [Add New Attendee Type](#)

Match your attendee types, so that your data is imported into the correct place. The system will match what it can for you. For any that it can't match, you will need to select the corresponding type from the list.

If you need to add another attendee type, you can do so from this screen. Enter the name into the box and click [Add New Attendee Type](#)



Once you have mapped your attendee types, click

[Confirm Type Mappings](#)

This will confirm your settings and import the data.

The next screen will show you the progress of the import. Once the import is complete, you will see the status 'Imported, Confirmed'.

Upload a CSV Spreadsheet			
Original Text File Name	Records Added/Updated	Import Date and Time	Import Status
Import Test 26 Oct Update fairly large 5000.txt	<input type="text"/>	17/11/2014 12:06	Importing (2/5002)
For eblast test 0805.txt	10	17/11/2014 12:05	Imported, Confirmed <a href="#">Delete Batch</a>

### IMPORTANT THINGS TO REMEMBER

Use Unicode Text format to ensure any foreign characters are imported.

If there is a unique ID, it is useful to import this.

Remember to go through the Map Choices options otherwise some could be missed and may not be imported.

# 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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