

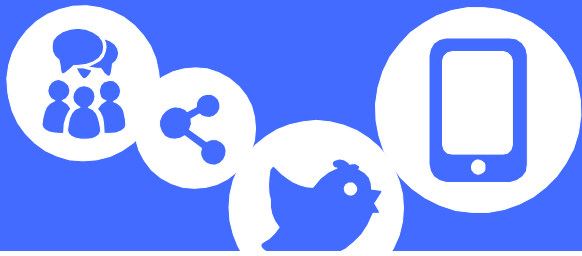


How to:

Clone a Previous Event


EventReference User Guide #24



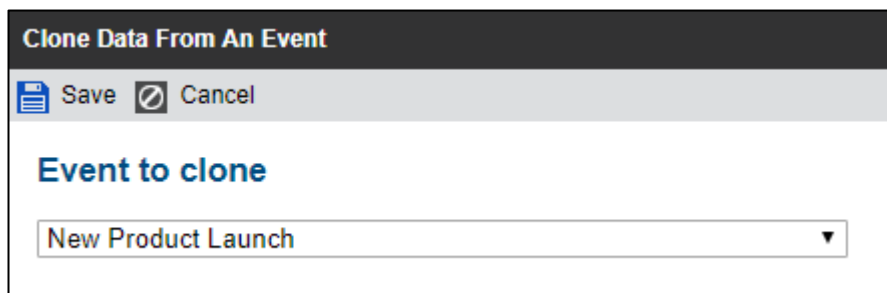


You can use the clone feature within EventReference to speed up the process of setting up a new event. This is particularly useful if you do the same event each year, or you have a series of events that require the same or similar forms.

Log in to EventReference.

Click  Clone Event

Select the event you want to clone from the drop down list.



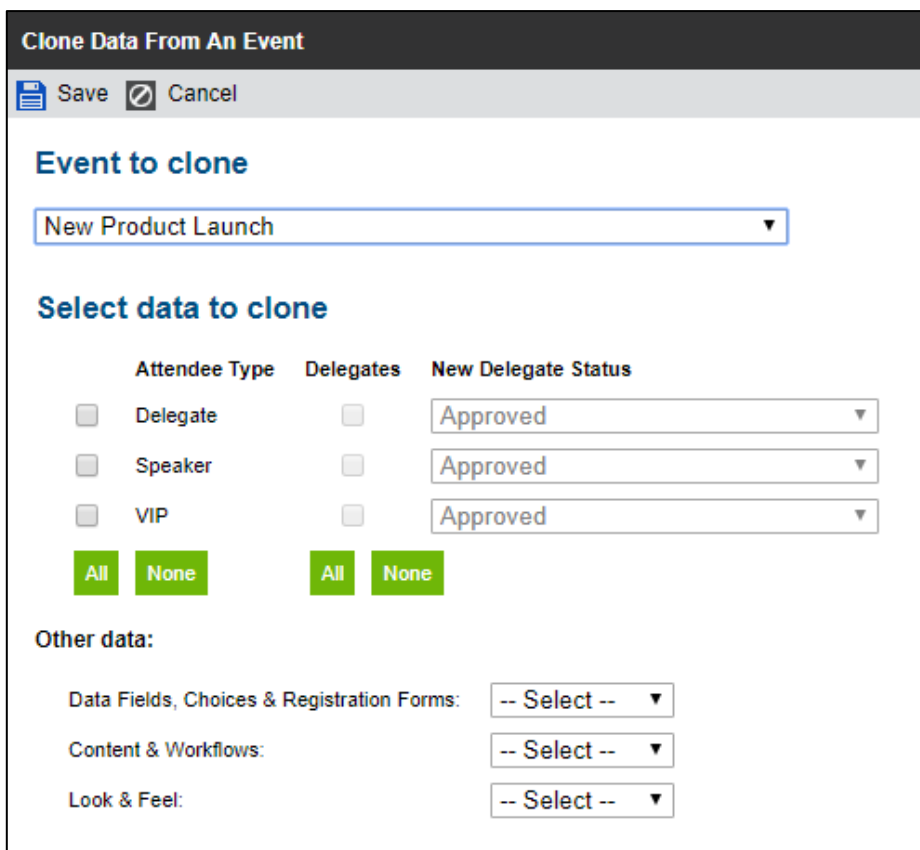
Clone Data From An Event

Save Cancel

Event to clone

New Product Launch

Next you will need to select what you want to clone.



Clone Data From An Event

Save Cancel

Event to clone

New Product Launch

Select data to clone

Attendee Type	Delegates	New Delegate Status
<input type="checkbox"/> Delegate	<input type="checkbox"/>	Approved
<input type="checkbox"/> Speaker	<input type="checkbox"/>	Approved
<input type="checkbox"/> VIP	<input type="checkbox"/>	Approved

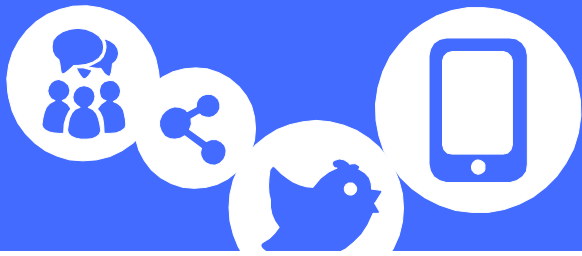
All None All None

Other data:

Data Fields, Choices & Registration Forms: -- Select --

Content & Workflows: -- Select --

Look & Feel: -- Select --



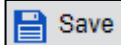
Tick the attendee types you want to clone. This will create the same attendee types within the new event.

Select whether or not you want to include the data from the previous event. This can be useful if you are planning to send out invitations with smart links.

If you are importing the data, select which status you want it to have. If you are sending smart links, this must be an incomplete status.

Now select which other items you want to clone into the new event.

- Data Fields, Choices & Registration Forms – you need to select this if you want the forms to be the same in the new event, otherwise you will be given the default set of fields.
- Content & Workflows – this will clone any emails, pages and messages into the new event (and also workflows if you have these active).
- Look & Feel – selecting this will apply the same theme and header graphics etc to your new event.

Once you have selected the items you want to clone, click  Save

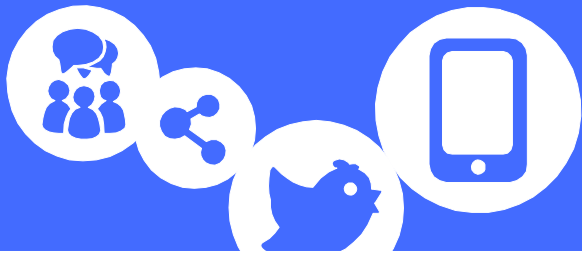
The next screen will look very much like the standard Create Event screen. **N.B. if you click cancel here, you will need to select the cloning options again.**

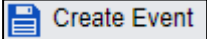
Attendee Type	Delegates	New Delegate Status
Delegate	X	
Speaker	X	
VIP	X	

Other data to be cloned:

- Data Fields, Choices & Registration Forms
- Content & Workflows
- Look & Feel

Registration Type: Free Paid



Name your event, select Free or Paid depending on whether or not your registrations are going to be chargeable and then click 

Click through the wizard as you normally would, adding any information you need to. This is a cut down version of the wizard, depending on the cloning options you have selected.

Once you have clicked Finish, your event will be created, containing all the items you selected to clone from the previous event.

You can edit your event in the normal way.

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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