Administrative User Guide for CONREGO

A guide intended for individuals seeking answers to questions related to the daily use of the system in terms of participant management.

Edition I, dated 2025.02.10

INTRODUCTION

CONREGO is a comprehensive tool for managing the participant registration process for events, handling payments, and generating reports. This manual will help you effectively use the main functionalities of the system.

DASHBOARD

The first screen visible after logging into the CONREGO system is the DASHBOARD, which contains a summary of the most important event statistics displayed in panels:

REGISTRATIONS - informs about the number of completed registrations within a selected timeframe (today, month, or total).

INCOME - informs about the current value of revenue from sold tickets in the selected currency and timeframe (today, month, total). Revenue is calculated based on the value of registrations with the "paid" status.

FORECASTS - informs about the expected revenue value from sold tickets in the selected currency. The forecasted revenue is the sum of the values of registrations with "paid" and "unpaid" statuses.

ATTENDANCE - informs about the number of people who have arrived at the event. The number of attendees is calculated based on attendance records using the CHECK-IN module.

PROGRESS OF REGISTRATION OVER TIME - contains a chart presenting the progress of registrations with FINAL STATUSES over time: week, month, and year.

TICKETS - a pie chart showing the number of registrations broken down by Ticket Types.

STATUSES - a pie chart presenting the number of registrations divided into all possible statuses: *STARTED, COMPLETED, PAID, UNPAID, IMPORTED, and CANCELED.*

OFFER - presents a numerical breakdown of registrations concerning available Offer Elements.

REGISTRATIONS - displays the most recently added or modified participant registrations.

HELP AND SUPPORT

To quickly obtain answers to questions, you can use the following options:

Support Center – a link to the page: https://conrego.tawk.help/en-gb, which contains a number of articles addressing many questions related to using the CONREGO system.

Video Guides – directs to the YouTube channel, which contains instructional videos helpful for daily work with the system.

Online Consultations – schedule an online meeting with a CONREGO representative.

CHAT

In the bottom right corner of the screen, there is a chat icon where you can receive answers to any questions:

- On weekdays from 9:00 AM to 5:00 PM – you can chat with our consultant.
- Outside of working hours, your questions will be answered by an AI agent trained based on the entire knowledge base about the application.

ATTENDEES PANEL

The **ATTENDEES** panel displays a list of individuals who are in the process of registration or are already registered for the event. This is where you manage event participants and their registrations.

In this section, you can add participants using the **ADD REGISTRATION** button:

- Add a single attendee: add a participant by entering their details and the option to create a transaction,
- Add blank registrations: create registrations without any data,
- Import attendees: add a database from an XLS file (a template is available),
- Import supplementary data: add information to existing registrations based on the ATTENDEE CODE (which is an automatically assigned unique registration identifier for each participant).

In the ATTENDEES panel, you can download an XLS report with a list of participants. The report can include all or only selected columns of data.

REGISTRATION FILTERING

➔ Video: **Filtering registrations and transactions**

Participant registrations visible on the ATTENDEES screen can be filtered by:

- Ticket type.
- Registration status.
- Registration language.
- Items of the offer selected during registration.
- Items of the offer, where the attendee was marked as present (Access Control).
- Participant's recorded attendance at the event (using the CHECK-IN module).
- Keywords in fields such as: first name, last name, email address, phone number, company name.
- Registration date within a selected time range.
- Consent to receive emails.

Filters can be freely combined and saved to facilitate searching, sending mailings, generating reports, and personalizing PDF files later.
Participant records can be searched using the search field. The search includes the fields: first name, last name, email address, and phone number.

MASS ACTIONS

For selected registration records (participants), the following bulk actions can be performed:

- Download XLS with the list of selected participants.
- Send a message.
- Generate a PDF file.
- Set status to completed.
- Set status to started.
- Set status to canceled.
- Sign up for offer items.
- Remove registrations.
- Accept registrations. *
- Reject registrations. *

*These options are available if the Free Registration Verification mode is configured in the Registration Template.

REGISTRATION STATUSES

A REGISTRATION STATUS is a label describing the current state of a registration record (attendee) in the CONREGO system:

STARTED - means that the participant started the registration process but did not complete it (for example, they left the page before finishing the process).

COMPLETED - means that the participant successfully finished the free registration (none of the selected offer items had an assigned price).

PAID - means that the participant successfully completed the paid registration and paid the price based on the selected offer items.

NOT PAID - means that the participant successfully completed the paid registration process but has not yet paid for the selected offer items.

IMPORTED - a status automatically assigned to registrations imported into the system.

CANCELLED - a status assigned to registrations for participants who have canceled their participation in the event (this status can be added manually or automatically assigned if payment is not made within X days, based on the registration template configuration).

EDITING PARTICIPANT DATA

The **ATTENDEE CARD** is a screen that provides a summary of each participant's data. Using its interface, you can:

- Verify the current registration status and modify any data and the offer.
- Create and settle transactions and issue invoices (if the registration is paid).
- Send email and SMS messages to the participant (based on templates created in the COMMUNICATION section).

- Add comments visible to other administrators.

How to create a transaction for an attendee?

1. Go to the **ATTENDEE CARD.**
2. In the left column, click the **PAYMENTS** shortcut.
3. Click the **NEW TRANSACTION** button.
4. Choose the method for defining the transaction amount: **amount derived from selected items of the offer** (which can be chosen via a separate selector) or **any amount** (entered manually).
5. Set the payment deadline (number of days).
6. Choose the payment method.
7. Optionally, add a comment that will appear on the proforma invoice.
8. Check the option **Send a confirmation of transaction to the attendee** if you want the system to send an email with the proforma invoice.
9. Click the **ADD** button.

How to settle a transaction / issue an invoice?

If the payment for the registration is made via bank transfer, the transaction must be settled manually. However, in the case of payments processed by the operator, the final invoices are issued automatically.

1. Go to the **ATTENDEES CARD.**
2. In the left column, click the **PAYMENTS** shortcut.
3. Locate the transaction related to the payment in the transaction list.
4. Click the **SETTLE** button in the **CONCLUDED ON** column.
5. In the new window, select the proforma invoices that have been paid.
6. Ensure that the values in the following fields are correct: total gross amount, final invoice number, date of sale, invoice issue date, and service name.
7. Select the option **SEND A CONFIRMATION OF TRANSACTION TO THE ATTENDEE** to send the participant an email with the final invoice.
8. Select the option **SEND SMS WITH TRANSACTION CONFIRMATION TO PARTICIPANT** to send the participant an SMS with the transaction confirmation.
9. Click the **INVOICE PREVIEW** button to make sure the invoice will be issued correctly.
10. Click the **SETTLE** button to settle the transaction and issue the final invoice.

How to issue a correction for an invoice?

1. Go to the **ATTENDEE CARD.**
2. In the left column, click the **PAYMENT** shortcut.
3. In the **FINAL INVOICES** section, select **ISSUE A CORRECTION.**
4. Enter the corrected gross invoice amount, the reason for the correction, and any additional comments for the invoice. Click the **ADD** button.
5. Download the credit note and send it to the participant manually, as the system will not send this invoice automatically.

TRANSACTIONS

The **TRANSACTIONS** screen displays a list of transactions resulting from attendees' registrations. You can settle a transaction directly from the transaction row (using the **SETTLE** button next to the proforma invoice number) or go to the **ATTENDEE CARD**.

Transactions can be filtered using the following criteria:

- Transaction status (paid, not paid, correction).
- Transaction currency.
- Payment method.
- Transaction settlement deadline.
- Transactions based on selected items of the offer.
- Whether a final invoice has been issued for the transaction.
- Keyword search.

The **DOWNLOAD INVOICES AS ZIP** button on the **TRANSACTIONS** screen allows you to download a ZIP file containing all invoice documents in PDF format.

TOOLS SECTION

The **TOOLS** section provides access to the following modules:

- Communication
- Report Generator
- Document Personalization
- On-site service

COMMUNICATION

The **COMMUNICATION** screen allows you to:

- View the list of **email and SMS message templates**.
- Access the editing and creation of new email and SMS message templates.
- Access the **SENDING HISTORY** and **DELIVERY REPORT**.
- Initiate sending email or SMS messages to designated target groups.

The **DELIVERY REPORT** summarizes the effectiveness of the email delivery and the recipient's response (open/click). The report is available only for emails sent via the local SMTP server (email addresses in the *.conrego.app subdomain).
The report will not be available if a custom email address was used for sending the message due to the inability to track deliveries.

The **SENT MESSAGES HISTORY** includes a summary of sent messages, detailing the template type, name, creation date of the send, send status, number of recipients, and the user who initiated the send.

The **CREATE NEW TEMPLATE** button opens the template type selection screen (email or SMS). The message creation screen allows you to draft and prepare the content of the message. The content can include TAGS that personalize the message for the target recipient based on data from the registration form.

How to create an email message template?

➔ Video: [How to prepare and send invitations with an individual registration link?]

1. Go to **TOOLS > COMMUNICATION** and click the **CREATE NEW TEMPLATE** button.
2. On the template type selection screen, choose **CREATE EMAIL TEMPLATE.**
3. On the template creation screen, enter the **TEMPLATE NAME**.
4. Enter the **SUBJECT** of the message.
5. Optionally, select an existing email address or add a new one in the **RECIPIENTS OF EMAILS FROM ATTENDEES** field.
6. Optionally, select an existing email address or add a new one in the **SEND COPY TO** field.
7. Enter the **MESSAGE CONTENT** using the content blocks in the creator. You can drag content blocks from the right column into the editor area and start editing them. Alternatively, you can use the option to input content using your **OWN CODE (HTML)**.

TAGS are markers used in email message content (or during registration process stages). When a tag is used, the CONREGO system replaces it with personalized content based on the participant's data (e.g., the FIRST NAME tag will insert the participant's first name in that spot).

How to use TAGS?

While editing the text content of an email message template, click the +TAG button.
Clicking this button will open a window offering a selection of tag types:

1. **Add a section with attendee details:** Tags for form sections insert entire sections of the form into the message content (section header, field labels, and their values).
2. **Add a value from the registration form:** Tags for form values insert the values of selected fields into the message content (e.g., last name).
3. **Add payer form value:** Adding attendee data related to payment.
4. **Add Special Tags:** Special tags insert specific content into the message, such as: Participant's agenda, Participant's agenda without prices, QR code, A link to add the event to a calendar.

How to prepare a group for sending an email message?

1. Go to **TOOLS > COMMUNICATION.**
2. Select the message you want to send and click the **Send Message** icon.
3. A window will appear where you need to choose the target group:
    - **Any recipients** – enter email addresses.
    - **Registered participants** (manual selection) – you can manually select participants and apply filters.
    - **Registered participants** (filter selection) – use a previously saved filter*.
4. Click the **NEXT STEP** button.
5. Start sending immediately or enter a date and time for delayed sending.

∗To save a filter, go to the ATTENDEES panel. Click the Filter icon, then choose the filtering method, e.g., by ticket type or status. After making the selection, save the filter under a chosen name. The saved filter can be used for sending messages, generating reports, and creating documents in PDF format.

REPORT GENERATOR

The **REPORT GENERATOR** screen offers the ability to configure, edit, and download reports based on data collected in the CONREGO system database.

If no reports have been created yet, the screen will display panels allowing the creation of one of three types of reports. When reports already exist, creating a new report is available through the CREATE NEW REPORT button.

Clicking the **CREATE NEW REPORT** button will take you to the report type selection screen:

1. **Data report** (includes a profiled list of participants).
2. **Attendance lists** (generated based on QR code scans).
3. **Summary report** (includes numerical or statistical data).

How to create a DATA SUMMARY / ATTENDANCE LIST report?

1. Open the **TOOLS** menu in the main navigation and select **REPORT GENERATOR**.
2. Click the **CREATE NEW REPORT** button.
3. Choose **DATA REPORT / ATTENDANCE LIST**.
4. On the data summary settings screen: enter the **REPORT NAME**, optionally apply one of the saved filters, and select the data fields to be included in the report.
5. Click the **SAVE AND CONTINUE** button.
6. On the next screen, enter an optional password to secure the XLS file.
7. Click the **SAVE SETTINGS** button.

From now on, the report will be available for download on the main **REPORT GENERATOR** screen.

How to create a NUMERICAL SUMMARY report?

1. Open the **TOOLS** menu in the main navigation and select **REPORT GENERATOR.**
2. Click the **CREATE NEW REPORT** button.
3. Choose **SUMMARY REPORT.**
4. On the data summary settings screen: enter the REPORT NAME and select the type of numerical summary.
5. Click the SAVE AND CONTINUE button.
6. On the next screen, enter an optional password to secure the XLS file.
7. Click the SAVE SETTINGS button.

From now on, the report will be available for download on the REPORT GENERATOR screen.

The numerical summary configuration screen allows the creation of reports containing:

- Registrations by Ticket Types
- Registrations by selected offer items

- Income by Ticket Types
- Income by selected offer items
- Attendance on-site (Check-in)
- Attendance at selected offer items (Access Control)

DOCUMENT PERSONALIZATION

The **DOCUMENT PERSONALIZATION** screen offers the ability to configure, edit, and download PDF files based on saved PDF document templates.
These can include tickets, certificates, or identification cards.

The available DATA TYPES for personalizing a PDF template are divided into:

- Standard data such as: first name and last name, registration number, participant code, registration language, and all active fields from the registration form.
- Other data such as: participant agenda, participant agenda without prices, QR code, and "add to calendar" links.

PDF templates can be used:

- As attachments to emails (e.g., ticket, certificate).
- As multi-page PDF files intended for printing in a printing house.
- As templates for printing personalized identification cards or self-adhesive labels using the CHECK-IN module at the reception on-site.

How to Create a New PDF DOCUMENT TEMPLATE? (ID card, ticket, certificate)

1. Open the **TOOLS** menu in the main navigation and select **DOCUMENT PERSONALIZATION.**
2. If this is the first PDF document being created in the system, a wizard will appear.
3. If templates have already been created, click the **CREATE NEW TEMPLATE** button to go to the wizard.
4. Upload the PDF file that will serve as the background for the template or start creating an empty document (specify its dimensions and background color).
5. In the **PDF TEMPLATE CREATOR** screen, enter the **DOCUMENT NAME.**
6. Using the **+ADD NEW FIELD** button, add any **DATA TYPE** to the workspace of the PDF template.
7. For each **DATA TYPE**, a **FIELD OPTIONS** section will appear in the right column.
8. Using the available options in **FIELD OPTIONS**, set the **DATA TYPE, FONT**, and its parameters.
9. In the LAYERS section, specify the LAYERS NAME for the **PERSONALIZATION FIELD**.
10. Set the position of each **PERSONALIZATION FIELD** as desired.
11. Click **SAVE** or **SAVE AND GENERATE PDF** to use the completed template.

ON-SITE SERVICE

The **ON-SITE SERVICE** screen allows you to choose one of four functions for managing attendees during the event:

- On-site Service Settings
- **CHECK-IN Module (for browsers)**, used for handling participant check-ins at the reception.
- **ACCESS CONTROL Module (for browsers)**, used to control participant access to selected areas during the event.
- A screen describing the operation of the **CONREGO Check-in** mobile app, available for iOS and Android systems.

ON-SERVICE SETTINGS SETTINGS

In this panel, you should determine which form fields and offer elements should be visible on the **CHECK-IN** and **ACCESS CONTROL** module screens.

Another important element is marking the status of participants who are authorized to enter the event venue.

QR codes can have additional functions, beyond automatically identifying the participant. Scanning the QR code with a phone can redirect the participant to a selected webpage or allow the participant's business card to be downloaded in VCF format.

Using the CHECK-IN module on devices with printer connectivity, you can print documents such as ID cards or adhesive labels. To do this, activate printing during CHECK-IN.

We recommend testing the CHECK-IN module before the event starts.

After testing, you can reset the reading database in the CHECK-IN and ACCESS CONTROL modules using the available buttons at the bottom of the screen.

How to manually mark a participant's attendance on the CHECK-IN screen?

To manually mark a participant as present at the event, follow these steps:

1. Search for the participant's record using the **SEARCH FOR ATTENDEE** field.
2. Select the participant's record by clicking on it.
3. Once the data is loaded, a notification bar will appear with the text **ATTENDEE DATA RETRIEVED.**
4. Click the **MARK PRESENCE** button.
5. The notification bar will display the message **ATTENDANCE RECORDED.**

How to mark attendance using a QR code scanner?

Marking participant attendance at the event using a QR code scanner is an automatic process. Make sure the QR code scanner you are using is configured to insert a TAB (tabulator) after each QR code scan. Before you start scanning, click on the **SCAN CODE** field and begin scanning the QR codes.

After scanning the QR code:

1. The **SCAN CODE** field will display the **PARTICIPANT CODE** (e.g., *M1XD3WGY*).
2. The notification bar will show the message **ATTENDANCE RECORDED.**
3. The participant's data will appear in the data area.

How to add a new participant on the CHECK-IN screen?

If the option to add new participants is enabled in the **ON-SERVICE SETTINGS**, a button **ADD A NEW ATTENDEE** will be visible in the left column. Click it to open the data entry form. After entering the data, click the **SAVE CHANGES** button.

How to print a participant's ID?

If the option to print ID badges is enabled in the **ON-SERVICE SETTINGS**, the **PRINT BADGE** button will be visible in the left column. Click it to open the print window and confirm the printing.