





The Complete Event Review Checklist

Getting Started

If you're ready to do a complete review of your event, be sure that the event is still in testing status. That way, you can work on it, enter test registrations, etc., without incurring any charges or potentially affecting real attendee data.

The best way to see how your event looks and works is to enter some test registrations. If you're using registration types for your event, enter one or more registrations using each Registrant Type. Confirm that the correct information displays, the pricing is accurate, and the payment method(s) are correct for each of your Registrant Types.

Finally, keep in mind that RegOnline also offers context-sensitive help via our comprehensive [online User's Guide](#). In every tab and section of your event setup, you'll see a small Help icon  along the right side of that heading. You may also have a video help icon  that will show you a quick help video. Just click the icon to go directly to a help file or video for that section, including field descriptions, related information, and more.

As you review your event, you can use the following checklist to confirm that the event setup is correct for your needs.

Registration Form Pages

Start page

Event Basics

- Event Title section – title is correct
- Registration Form URL – be sure that you have entered a custom URL that you would like to use for your event.
- [Event Fee](#) – If you only have a single registration fee for your event, then this feature should be used.
- Event Date & Time section – start and end dates/times are correct for the event
 - ❖ This will affect your reminder and follow up emails.
- Date & Time Options - Time Zone section – the selected time zone matches the address where your event will be held
- Location Name – the address is correct for the event (this will affect the map automatically generated by Google Maps – be sure to test this link on the confirmation page and/or confirmation email to ensure accuracy).
- Contact Email Address – the email address is correct, and is for the person(s) who your attendees should contact with any questions about this event. (You can add additional contact details on the [Event Website](#))

Registrant Types

- Question/Description – The correct text is entered to display to your registrants when selecting Registrant Types. (Select the checkbox titled “Customize Registrant Type Display Options” to see modify this field)

Considerations for creating individual [Registrant Types](#)

- General section – Registration Type Name entry is the text you want your attendees to see on the registration form
- General section – Column Name on Reports field entry is the text you want to display on reports
- General section – Initial Status is correct – registrants will never know their status, this is for internal tracking purposes.
- General section – Limit – if used, the limit is correct for the number of people allowed to register as this type
- Advanced section - [Event Fee](#) – The correct fee is set up for each different Registrant Type. Early-bird and Late pricing options are set up correctly.
- Advanced section - Visible fields – Registrant Type is visible to the correct group(s) - Public (for your general attendees), Admin (for you during an Admin Register), and/or On-Site (for onsite kiosk self-registration)
- Advanced section - Alternative Confirmation Email – if used, the content of the email is correct for each Registrant Type.

Registration Rules

- If group registrations are enabled and you are using Registrant Types for this event, then review the option to allow/disallow groups of mixed Registrant Types. “Members of the same group must select the same Registrant Type.”
- [The correct limit is set for the event](#) – Be sure that you have entered the correct “event full message” or sold-out message that displays if there is a limit set.
- Initial Registration Status – entry is correct

Advanced Settings

- Verify that the advanced settings are correct for this event. This is important to check if the event was copied or if you have made any changes to the options in this section.

Personal Information page

- Standard Field sections – correct fields are set to be visible and/or required
- Standard Field sections – if used, any customized field names that you have entered are correct
- Personal Information Page Header/Footer section – if used, information is correct and displays on the Personal Information page

Considerations for creating Custom Fields on the Personal Info page

- In the Preview window, select each Registrant Type to confirm that the correct custom fields display to the correct type.

General Section

- Field Type – entry for each field is correct for the type of information you will be collecting in that field
- Question/Description – entry is correct and is what you had intended to be seen by the *attendee* on your form
- Title on Invoice/Receipt – entry is correct and is what you had intended to be seen by *you* when reviewing an attendee's record or receipt.
- Which types of registrants can see this question? – if used, this custom field is visible to (and/or required of) the correct Registrant Type(s)
- Multiple Choice items section – if Field Type is multiple choice (dropdown or radio buttons), the correct choices are listed

Capacity & Miscellaneous section

- The correct Limit, if used, is entered for this custom field and the item has the appropriate "Sold Out message" is entered, if applicable.
- Field Position – the field is oriented correctly with the Question/Description (Checkbox fields typically display to the left of caption, most others typically display to the right or below the caption)
- [Group Name](#), if used, is correct and matches the entry in the other custom fields with which it is grouped
- Custom Field Details text (or the External URL), if used, contains the correct information (or URL)
- If the Include on Badge box is checked, the correct Caption has been entered
- "Show this field starting" and/or "Hide this field starting" dates, if used, are correct for this custom field to display and/or not display on the form

Agenda page

- In the Preview window, select each registration type from the dropdown list in the top right corner of this window, and confirm that the correct Agenda Items display to each Registrant Type *and only* to the intended type(s)
- If all attendees must pay something to attend your event *and* some of your Agenda Items with fees associated with them are *not* required, then the checkbox titled "Require the Selection..." has been checked
 - ❖ Note: Registration Fees should be set up using the [Event Fee](#) feature, unless there are [multiple options/fees that are available to each Registrant Type](#). Then you can use the Agenda page to offer those options.
- Waitlist Options section – if you will be using the [automatic waitlisting](#) functionality for some of your Agenda Items, then the Enable Waitlist box has been checked and the appropriate instructions and/or email content have been entered. Note that you must also enable waitlisting for each Agenda Item that will use this functionality.
- Agenda Page Header/Footer section – if used, information here is correct and displays on this page

Setup considerations for individual Agenda Items

Define Agenda Item / Fee - General Section

- Field Type – entry for each field is correct for the type of information you will be collecting in that field
- Question/Description – entry is correct and is what you had intended to display to *attendees* on your form
- Title on Invoice/Receipt – entry is correct and is what you had intended to display when reviewing an attendee’s record or receipt
- Which types of registrants can see this question – if used, this Agenda Item is visible to (and/or required of) the correct Registrant Type(s)
- Multiple Choice items section– if Field Type is multiple choice (dropdown or radio buttons), the correct choices are listed
- Dates, times, and location – if used, information is correct (this is not required)
- Regular Price – if used, the price here is the default amount that the attendee will be charged for this item. This can be overridden by the entries in the using the Early-Bird / Late pricing options
- [Early or Late Pricing Options](#) – if early and/or late pricing are being used for this item, the amounts and dates are correct.

Advanced Pricing Options section

- Discount Options – if used, the [discount code\(s\)](#) are in the format: *code=--amount* as shown in the examples to the left of this field
- Discount Options – if used, the Discount Code Caption is the text you had intended to display on the registration form

Capacity and Waitlisting section

- The Limit, if used, is correct and you are displaying a message when this item is full. You can also simply have the item “hide” or disappear when the limit is reached.
- If a Limit is specified and this item will use the [Waitlist functionality](#); the Enable Waitlist box is checked. Note that waitlisting must also be enabled for the event by checking the Enable Waitlist box on the Agenda/Fees tab.

Miscellaneous section

- Field Position – the field is oriented correctly with the caption (Checkbox fields typically display to the left of caption, most others typically display to the right or below the caption)
- [The Group Name](#), if used, is correct and matches the entry in the other Agenda Items with which it is grouped.
- The Agenda Item Details text (or the External URL), if used, contains the correct information (or URL)
- If you want this Agenda Item to display on the Event Website page, the Include on Event Website Agenda Item Tab checkbox is selected.
- If you want this Agenda Item to have an Add to My Calendar button on the attendee’s record after they have selected it (to add this as an Outlook appointment), then the “Display on Calendar” checkbox has been selected
- If the Include on Badge box is checked, then the correct information has been entered in the Caption field.

- The "Show this field starting" and/or "Hide this field starting" dates, if used, are correct for this Agenda Item to display and/or not display on the form.
- The correct email content for this Agenda Item, if used, has been specified in the Edit Confirmation Email and/or the Edit Reminder Email fields
[How do I send my attendees a list of the Agenda Items they have selected?](#)

Lodging & Travel page (if used)

[What are the options to display and/or collect lodging information for my event?](#)

- In the Preview window, confirm that the correct Registrant Type(s) are being prompted to enter their itinerary and preferences
- All Custom Fields sections (Lodging, Travel, Other Preferences) – if used, custom fields on this tab are correct (follow the checklist in the Custom Fields on Attendee Info tab section above)
- Lodging Page Header/Footer section – if used, information here is correct and displays on this page

Merchandise page (if used)

[How do I use the Merchandise page?](#)

- If all attendees are required make a selection on this page, the Don't Allow Fee Bypass box is checked

Setup considerations for individual Merchandise Items

- Fee Type – entry for each fee is correct for the type of fee that you will be charging your registrants
- Question/Description – entry is correct and is what you had intended to display to *attendees* on your form
- Title on invoice/receipt – entry is correct and is what you had intended to display to *you* when reviewing an attendee's record
- Column Name on Reports – field entry is the text you want to display on reports
- Visible & Required properties – the fee item is visible and required (if applicable)
- Hide Quantity, Minimum, Maximum, Hide Amount fields – if used, entries in these fields are correct
- [Discount \(Invitation\) Codes](#) – if used, the discount code(s) are in the format: *code=amount* and, if more than one code is specified, they are separated by commas
- Total Quantity Available for this Item – if needed, a total number of items available for sale has been specified
- Show this fee starting/Hide this fee starting – if used, the dates are correct for this fee to display and/or not display on the form
- Multiple Choice section – if Field Type is multiple choice, the correct selections have been defined

Payment page

- The correct Currency has been selected for the event
 - ❖ [Setting up your international event to avoid currency conversion](#)
- The correct Company Name has been entered
- If used, is the information in the Payment Page head/footer correct?

Credit Card processing section

- If credit cards are being accepted as payment for this event, the Process Credit Cards Online radio button is selected
 - ❖ [How do I get started doing online credit card processing?](#)
- If you want to manually process credit card payments at a later time, the "Do Not Charge Credit Card on Initial Registration" box has been checked
- If you want to be able to process additional credit card charges or refunds for attendees, the "Store Credit Card Numbers after Initial Payment Processing" box has been checked - *Highly Recommended.*
- If you want to collect the security code (CVV code) for credit cards, the Collect Credit Card Security Code box has been checked. If you want this field to be required, the Require This Code box is checked. *This number is never stored on the attendee's record after registration.*
- The correct payment types (credit cards, other methods) are checked and are visible to the correct registrants –
 - ❖ Public (for your general attendees)
 - ❖ Admin (for you during an Admin Register)
 - ❖ On-Site (for onsite kiosk self-registration)

Other Options

- Terms and Conditions section – if appropriate, the correct information has been entered and the Require Registrants to Accept Terms & Conditions box has been checked
- Payment Instructions - The correct information has been entered – *Recommended if you are allowing Check Payments.*
- Refund Message – if appropriate, the correct information has been specified
- Payment & Verification Page Header/Footer section – if used, information here is correct and displays on this page

Advanced Payment Options

- The Allow Partial Payments box, if used, is checked and the correct minimum amount and information have been specified
- Tax information – if used, the correct tax rates have been entered for the various fee items. - [How do I define a new tax?](#)


Confirmation Page

- Confirmation Page Message – the text entered here displays properly on the Confirmation page (to check this, go to Preview and then click the Confirmation tab)

Theme & Colors tab

- Color Schemes – make sure that the colors selected to display on the registration form are correct.
- Link Options – Is the correct URL entered for the link to home page? Are you going to use [RegOnline's Event Website](#) or an external URL to display event details?
- Customized Page Names– entries here are correct and display as expected (to check this, go to Preview and click the various tabs to see the "timeline" near the top of the page)
- Global Header / Footer - if used, the image(s) and content in the Global Header and Footer are the correct ones for this event.

Emails tab

- [Confirmation](#) and [Reminder Emails](#) have the correct information entered in both the **<HTML>** and **TEXT** sections of the content. You can test these emails using the test email icon .
- Notifications are enabled for the various situations so that you are notified for new registrations, updates, cancellations, etc.
- It is recommended that you notify your registrants when they have not properly completed their registration (incomplete registrations). You can enable this notification to be sent to you (the event coordinator) as well.

Event Website tab

[What is the Event Website and how do I use it?](#)

- If you would like to make the Event Website the default starting page for your event URL, then check the box at the top of this page. –*Recommended*
- Is the information displayed on the summary tab correct? You can customize any section or tab on the Event Website to display any information that you wish.
 - ❖ [How can I get my Agenda Items to display in the Event Website?](#)
 - ❖ [How do I change the tabs on the event website?](#)
 - ❖ [How do I show the number of days left for my early-bird fee?](#)
 - ❖ [How do I display the number of spaces available for my event?](#)