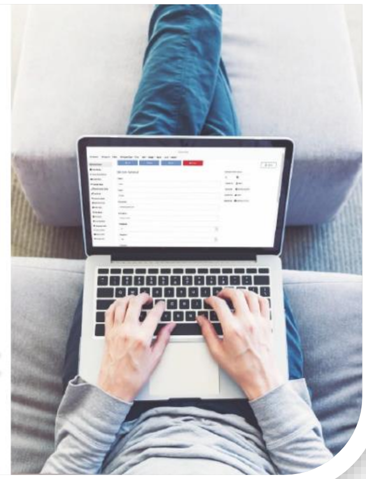
Documentation

GatherNext

Event & Conference Management
Web Application Software



GUIDE

User Manual

Note

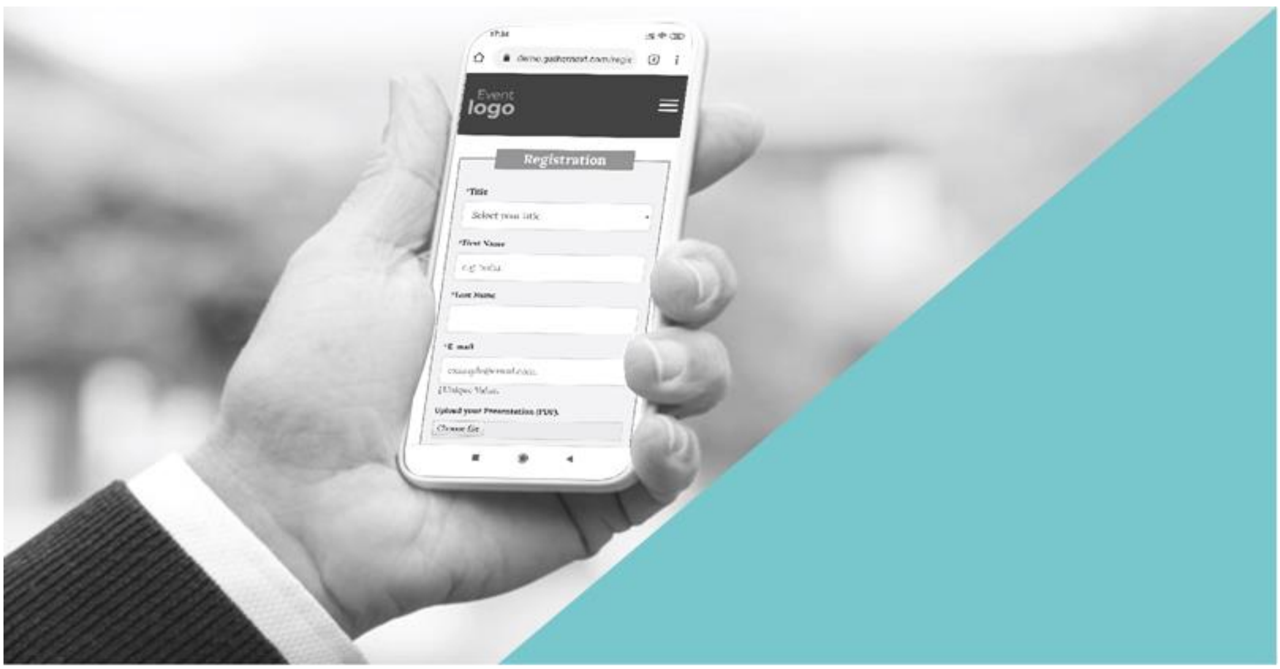
By reading and comprehending this enriched handbook, which includes educational videos, the reader will be fully equipped to manage the GatherNext (Event & Conference Management) web application. Please don't hesitate to contact us in case of identifying any errors or omissions. Best regards, The GatherNext Team.

info@gathernext.com

Contents

Introduction

The GatherNext (Event & Conference Management) web application is designed to streamline the registration management process for in-person events, such as conferences, seminars, and workshops. It caters to both event organizers responsible for registration management and participants seeking to register. This application benefits event organizers by increasing attendee turnout and reducing administrative support time through automated and semi-automated procedures. All information and reports are provided in real-time. **No programming knowledge is required, only basic computer literacy.**



Services Overview

The Organizer Can:

- Create the event's branded micro-website (mobile/tablet-friendly - 1 template).
- Configure their email provider's settings (SMTP Settings) to enable email correspondence through their own email account.
- Create multiple participant types, e.g., Speakers, Participants, VIPs, Staff, etc.
- Create different registration forms, including hidden registration forms, for each participant type by customizing the fields.
- Accept both Onsite and Online registrations.
- Receive payments through the Stripe card payment system directly into their Stripe account.
- Input the tag ID code (Ex. GT-XXXXXXXXX) using Google Tag Manager's analytics and marketing services.
- Enhance functionality by seamlessly adding third-party features and services like Zoom, Slido, YouTube, and others through embedding code.
- Manage registrations individually and collectively (editing, modification, changing status/type, etc.).
- Create personalized emails and customized PDF attachments that can be sent individually, in bulk, or automatically (routine communication).
- Generate personalized badges separately for each participant type.
- Scan participants' QR codes upon arrival with the ability to print their badges.
- Import/Export data (CSV/Excel).
- Monitor and export detailed event statistics and flowcharts (e.g., registrations, attendance, etc.).
- Create user profiles for immediate collaborators, choosing their access level.

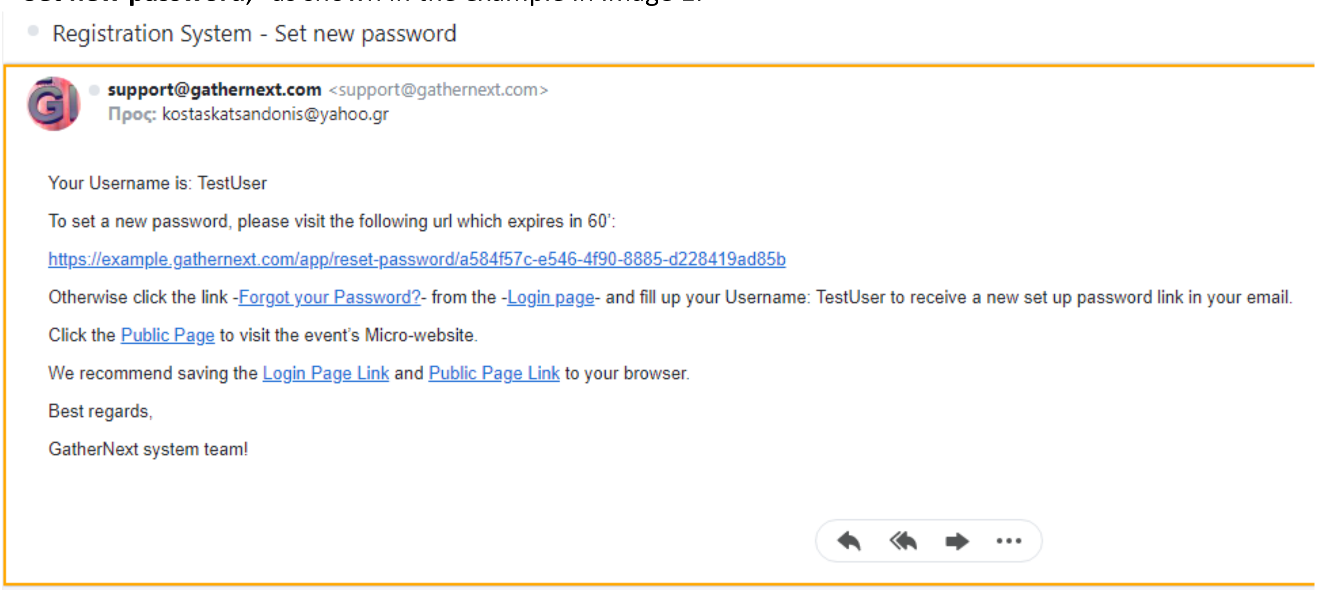
Participants can:

- Stay informed about the event through the micro-website.
- Register for the event without the need to create an account or memorize a password.
- Visit the registration page using a one-time password (OTP) and receive updates on the status of their registration.
- Edit their registration (excluding locked fields).
- Cancel their registration.
- Receive email updates on the progress of their registration and its current status.
- Make electronic card payments through the secure Stripe environment for event participation, before or after registration.
- Receive personalized attachments (PDFs) like participation certificates, badges, QR codes, etc., in their email.

Login

Tutorial video (Set new password)

The new user (User) will receive an email from support@gathernext.com with the subject: "**Registration System – Set new password**," as shown in the example in Image 1.



Registration System - Set new password

support@gathernext.com <support@gathernext.com>
Προς: kostaskatsandonis@yahoo.gr

Your Username is: TestUser

To set a new password, please visit the following url which expires in 60':

https://example.gathernext.com/app/reset-password/a584f57c-e546-4f90-8885-d228419ad85b

Otherwise click the link -Forgot your Password?- from the -Login page- and fill up your Username: TestUser to receive a new set up password link in your email.

Click the Public Page to visit the event's Micro-website.

We recommend saving the Login Page Link and Public Page Link to your browser.

Best regards,

GatherNext system team!

Image 1

Case 1

By clicking the first link within 60 minutes, they will be redirected to the password creation page (Image 2).

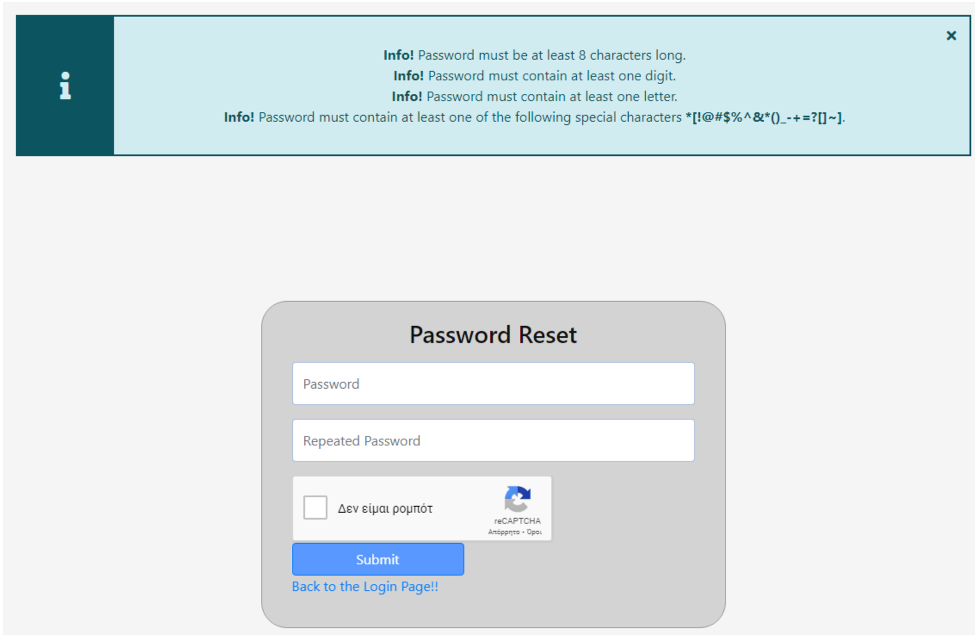


Image 2

Subsequently, using the username provided in the email and the newly created password, they can access the administration of the GatherNext – Event & Conference Management application through the following login page (Image 3).

Tutorial Video (Login)

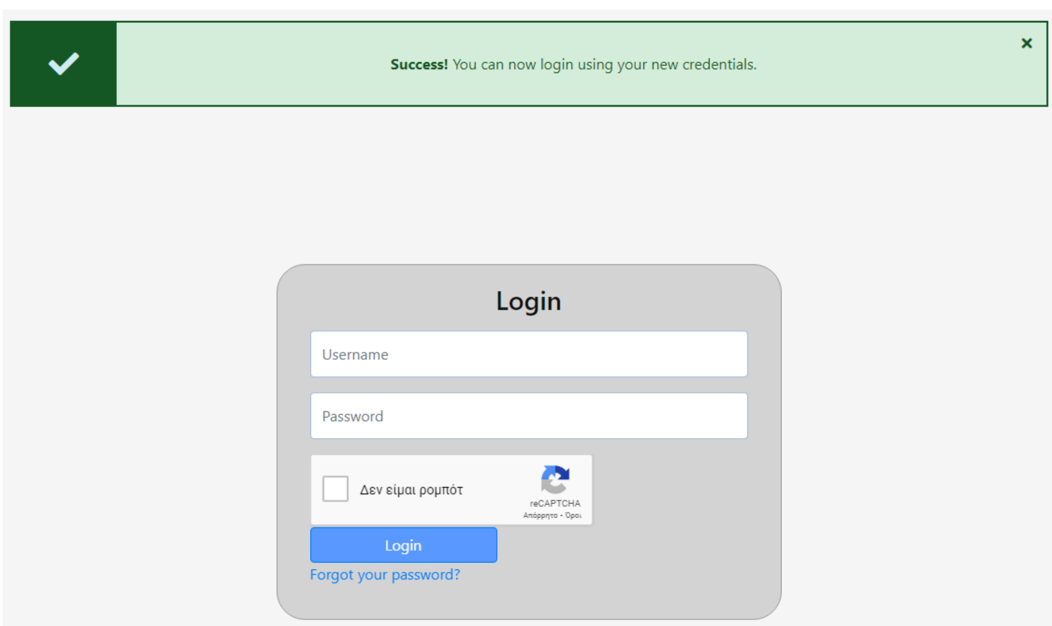


Image 3

Case 2

If the first link becomes inactive after 60 minutes, the user can left-click on the "Forgot your Password?" link in the email and will be redirected to the **Password Recovery page** (Image 4). Here, they enter the provided username and receive another email similar to the first one. This time, they have an active link to follow the process in the first case.

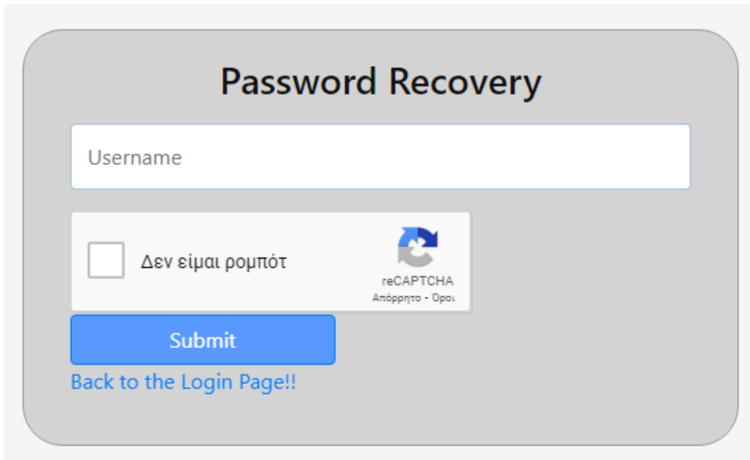


Image 4

In the email above, in addition to the ability to create/change a password, access links are provided: a) Login Page Link for the application's administration (Image 5), and b) Public Page Link for the micro-Website (Image 6).

It is recommended to save these two links in your browser. For better performance and application compatibility, we recommend using the Google Chrome or Firefox browsers.

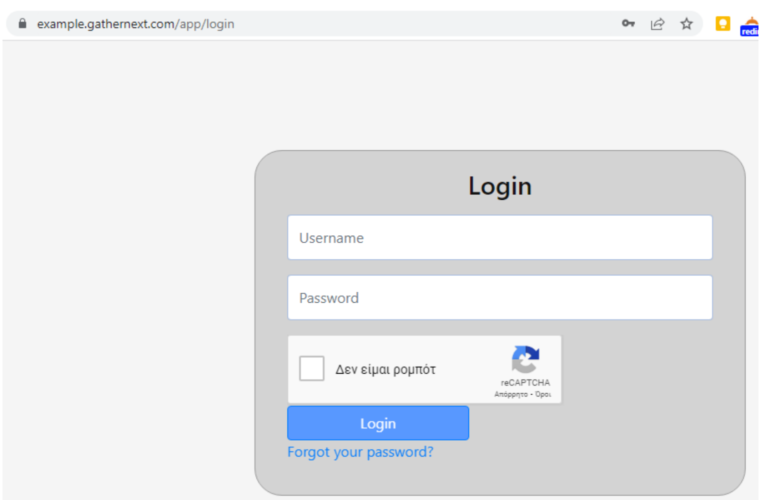
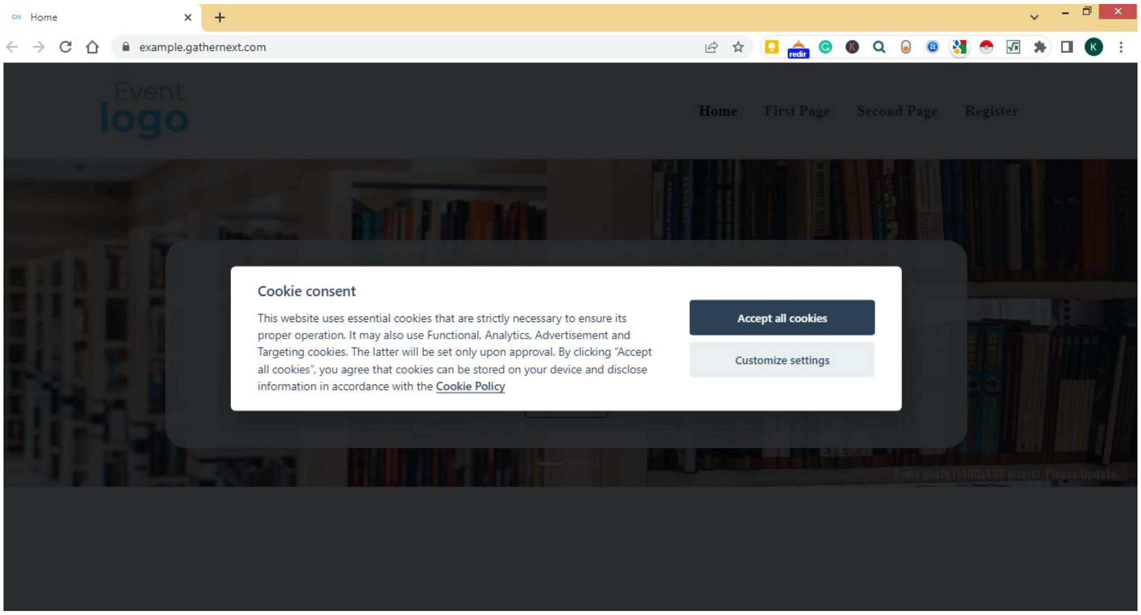


Image 5



Εικόνα 6

Dashboard

Once the user (User) accesses the application's administration, the first page they will encounter is the Dashboard, which includes statistical data and flowcharts for registrations and scanning. An explanation of the Dashboard and its tabs will be provided at the end of the guide after understanding the application's functionality.

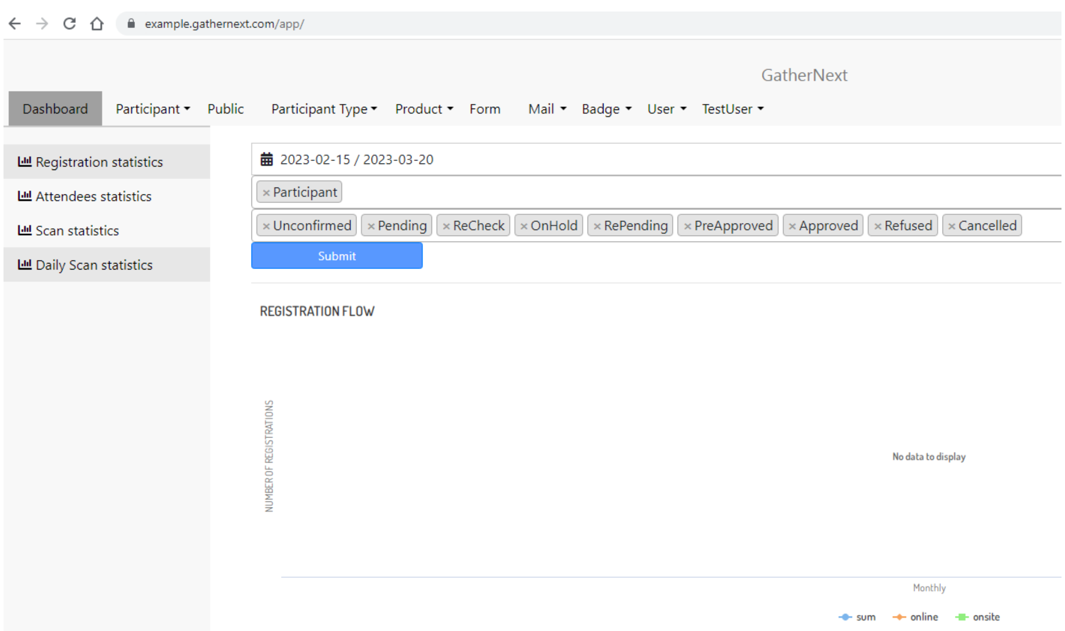


Image 7

To the right, within the horizontal menu, you will find the tab named after the user's Username (User). In Image 7, the user's Username is TestUser. It is a dropdown button with options: Profile and Logout. By clicking on the Profile option, the user is taken to the **Edit Use**r tab, where they can change the Username (recommended) and edit other details (Email, First Name, Last Name, Role, Active, Phone number, Landline number). Clicking on the Logout option, on the left, exits and disconnects the user from the application.

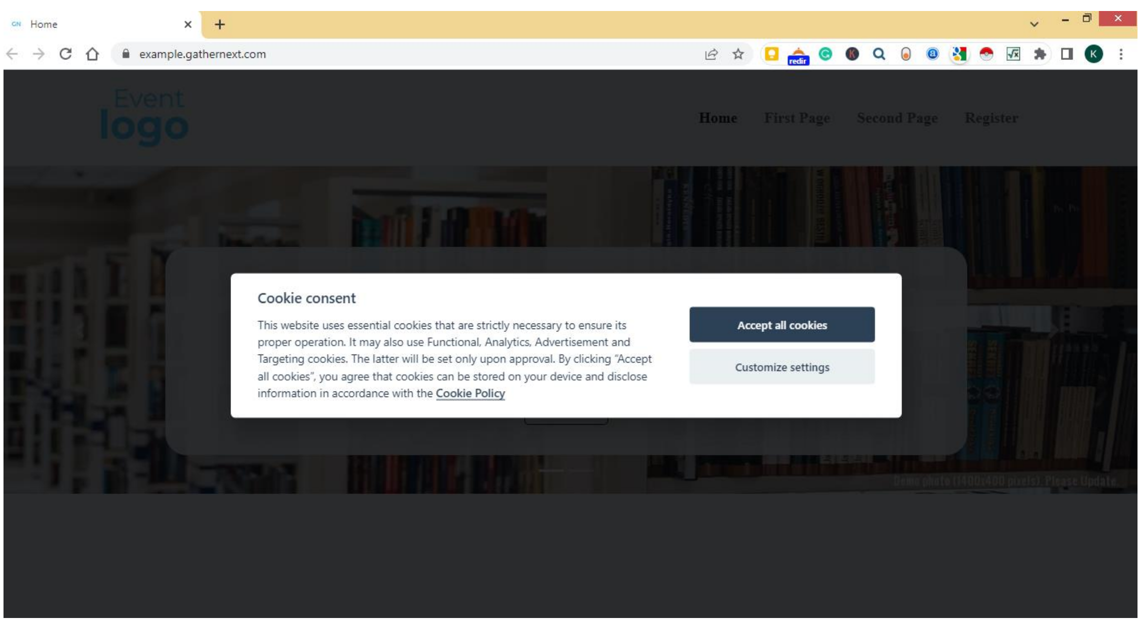
Participant

Explanation of the Participant tab and its contents will also be provided in a subsequent section after the user has first understood the application's functionality.

Micro-Website (branded)

Tutorial video (Public Page / Micro-website)

It is the website where the event's public information is hosted. It consists of a template that can be activated/deactivated at the organizer's discretion. The micro-website is mobile/tablet-friendly, encrypted with SSL, and for a visitor to navigate, they must provide partial or full consent for storing Cookies (Strictly necessary, Analytics, Functional, Advertisement and Targeting) on their device (computer, mobile, etc.). The micro-website is an integral part of the GatherNext application and is deactivated ("falls off") once the organizer's usage of the application concludes after the event is completed. The first image (without any editing) of the micro-website is as follows:



In Image 8, the URL of the Micro-website is https://example.gathernext.com/, where the prefix "example" has been predetermined by the organizer. All content is customizable through the Public tab in the application's administration.

Tutorial video (Public Page / Micro-website Cookies)

!!! Important: After every new addition/change/modification in the administration of the application, changes are saved by clicking the Save button on the left before switching tabs. Additionally, if the countdown timer (Image 9) in the top-right corner of the page is not reset, automatic logout will occur, and any unsaved changes will be lost. The timer resets even without changing the page by clicking on it.

Εικόνα 8

Public

It contains all the information that is displayed publicly on the micro-website.

Public → Event Details

Tutorial video (Event details – Terms And Agreement - Marketing Consent)

Tutorial video (Event details - Start - End - Deadline dates)

Tutorial video (Event details - Logo)

Tutorial video (Event details - Social Media Links)

In the Event Details tab, the following information is entered:

*Center	The name of the event venue is entered.	It appears on the main page above the map (Google Maps) if the option *Public → Home Page Settings →* ****Displayed event location container*** is enabled.
*Title	Event title is entered.	It does not appear on the main page.
*Display Terms And Agreements (Yes/No)	Display Terms and Conditions (Yes/No) in the registration form.	If "Yes" is selected, a checkbox for mandatory consent to the organizer's terms and conditions is displayed at the bottom of the registration form before submission. *Public → Event Details →* ***Terms And Agreements***
*Terms And Agreements	Terms and Conditions of the organizer.	Content editor (editor) where the organizer can create and upload the "Terms and Conditions" for visitor participation in the event, including adding a hyperlink or uploading a PDF.
*Display Marketing Consent (Yes/No)	Display Marketing Consent (Yes/No) in the registration form.	If set to Yes, a checkbox for potential consent to advertising/marketing purposes appears at the bottom of the registration form.
*Marketing Consent Text	Text for Marketing Consent.	Content Editor (editor) where the organizer can create and upload a consent text for advertising purposes.
*Start date	Event start date.	Date and time when the event will commence.
*End date	Event end date.	Date and time when the event will conclude.
*Dead line	Registration deadline.	"Registration deadline" refers to the date and time when registration for the event closes. If the registration deadline has not passed, registration buttons appear at three points:

		i. In the horizontal menu on the right. ii. On the Home Page in the center if the *Public → Home Page Settings → ****Displayed header information container*** is set to Yes. and iii. In the Footer if the *Public → Home Page Settings → ****Displayed footer details container*** is set to Yes. If the registration date has passed, registration buttons are not displayed, and registration forms are deactivated
Logo (Choose File) - Remove	The event logo, if available, should be in one of the following formats: .jpg, .jpeg, .pjpeg, .png, or .gif.	It appears on the left side of the horizontal menu. Clicking on it will take the visitor to the home page.
*The following social media links are displayed in the Footer (bottom right of the page) if the respective fields are filled out, and if the setting Public → Home Page Settings → ****Displayed footer details container*** *is set to Yes.*		
Facebook	Facebook account of the organizer / event.	The Facebook link of the organizer or the event is entered. If entered, the Facebook icon is displayed at the bottom right of the Footer. Clicking on it with the left mouse button leads the visitor to a new window at the Facebook link.
Pinterest	Pinterest account of the organizer / event.	The Pinterest link of the organizer or the event is entered. If entered, the Pinterest icon is displayed at the bottom right of the Footer. Clicking on it with the left mouse button leads the visitor to a new window at the Pinterest link.
Instagram	Instagram account of the organizer / event.	The Instagram link of the organizer or the event is entered. If entered, the Instagram icon is displayed at the bottom right of the Footer. Clicking on it with the left mouse button leads the visitor to a new window at the Instagram link.
Twitter	Twitter account of the organizer / event.	The Twitter link of the organizer or the event is entered. If entered, the Twitter icon is displayed at the bottom right of the Footer. Clicking on it with the left mouse button leads the visitor to a new window at the Twitter link.
Linked in	Linked in account of the organizer / event.	The Linked in link of the organizer or the event is entered. If entered, the Linked in icon is displayed at the bottom right of the Footer. Clicking on it with the left mouse button leads the visitor to a new window at the Linked in link.
Website	Organizer's website	The link to the organizer's or event's website is provided. If entered, an icon is displayed in the bottom-right corner of the Footer. Clicking on this icon opens the organizer's or event's website in a new window.

Youtube	Organizer's or event's YouTube channel.	The link is filled with the YouTube channel of the organizer or the event if available. If filled, the icon appears at the bottom right of the Footer. By left-clicking it, the visitor is directed to a new window at the YouTube link.
Tiktok	Linked in account of the organizer / event.	The Tiktok link of the organizer or the event is entered. If entered, the Tiktok icon is displayed at the bottom right of the Footer. Clicking on it with the left mouse button leads the visitor to a new window at the Tiktok link.

Public → Event Address

Tutorial video (Event Address)

In the Event Address tab, the complete address where the event will take place is entered.

*Country	The country is selected.	On the homepage, a map (Google Maps) will appear with a pin at the location that was specified, provided that the setting *Public → Home Page Settings →* ****Displayed event location container*** is set to Yes.
City	The name of the city/town/village is entered.	
Street	The street address (street name with a number) is entered.	
Postal code	The postal code of the location is entered.	

*To display the map on the homepage, the micro-website visitor must accept Functional Cookies.

Public → Organizer Details

Tutorial video (Organizer details)

In the Organizer Details tab, the information related to the organizer as an organization or company is entered.

These details will be displayed in the footer (in the center and at the bottom of the page) if the setting in

Public → Home Page Settings → ****Displayed footer details container*** is set to *Yes.*

*Name	Company / organization name, a distinctive title.	This name will appear as the sender of the emails.
Website	The organization's / company's website, if available.	It appears as an active link. Left-clicking opens it in a new window.

Email	The email account of the organizer.	This email account will receive responsive electronic correspondence from the registered attendees.
Mobile phone	Mobile contact phone if available.	
Land line	Landline contact phone if available.	

Public → Organizer Address

Tutorial video (Organizer address)

The information regarding the organizer's headquarters as an organization or company is entered in the Organizer Address tab.

*Country	The country is selected.	This information will be displayed in the footer (in the center and at the bottom of the page) below the Organizer Details, provided that the setting *Public → Home Page Settings →* ****Displayed footer details container*** is set to *Yes.*
City	The name of the city/town/village is entered.	
Street	The street address (street name with a number) is entered.	
Postal code	The postal code of the location is entered.	

Public → Home Page Settings

Tutorial video (Home page settings)

Within the Home Page Settings tab, you have the ability to fine-tune every aspect of what appears on the home page and in the footer. This comprehensive control also extends to meta tags, which play a vital role in optimizing your search engine ranking (commonly known as SEO). Furthermore, you can effortlessly input a tag ID code to harness the power of Google Tag Manager, specifically tailored to the organizer's micro-website, enhancing the capabilities of Google Analytics for analytics and marketing purposes.

*Active	This pertains to whether the Home Page is active or not.	If it's set to Yes, then the home page is displayed; otherwise, it's hidden.
*Displayed header information container	This concerns: i. The faint white frame and its content. ii. The text containing basic event information displayed. *Public → Home Page Settings →* ***Long description***	If it is set to "Yes," the container and its contents will be displayed. Otherwise, if set to "No," it will be hidden along with its content.

	iii. The main registration button/buttons.	
*Displayed time counter container	This includes: i. The countdown timer until the registration deadline, which can be found in *Public → Event Details →* ***Dead line*** καθώς και ii. The notification text regarding the active time container content that displays information about the time remaining until the deadline. This can be set in *Public → Home Page Settings →* ***Active time container content*** iii. The notification text related to the registration expiration after the deadline has passed, which can also be configured in *Public → Home Page Settings →* ***Expired time container content***	If it is set to "Yes," the container with its content will be displayed. Otherwise, when set to "No," it will be hidden.
*Displayed footer details container	This concerns the Footer of the micro-website. It contains the following: i. The label text for the useful links. *Public → Home Page Settings →* ***Useful links content*** *ii.* The link to the Home Page and the registration button/buttons. Public → Home Page Settings → **Simple register button display name**) or *Public → Home Page Settings →* ***Multiple register button display name*** iii. Information about the event organizer. *Public →* ***Organizer Details*** *iv.* Information about the event organizer's address. *Public →* ***Organizer Address*** v. The laabel text for social media accounts (Facebook, Pinterest,	If it's Yes, the Footer container will be displayed at the bottom of the micro-website with its content. Otherwise, if it's No, it will be hidden. The text "This content has not been created or endorsed by GatherNext." is permanent.

	Instagram, Twitter, LinkedIn, Website, TikTok, YouTube), *Public → Home Page Settings → **Find us at content*** as well as the active icons for these accounts (Facebook, Pinterest, Instagram, Twitter, LinkedIn, Website, TikTok, YouTube) *Public → Event Details →* *“**Facebook, Pinterest, Instagram, Twitter, Linked in, Website, TikTok, YouTube**”*	
*Displayed event location container	This contains: i. The label for the event location *Public → Home Page Settings → **Public → Displayed event location header*** ii. The address of the event *Public → **Event Address*** iii. The Google map with the exact location of the event is displayed.	If it's set to "Yes," the container with its content will be displayed; otherwise, if it's set to "No," it will be hidden. If consent is not given for Functional Cookies, the Google Maps will not be visible.
*Displayed moto container	This pertains to a container placed between the "time counter container" and the "event location container." It includes: i. A brief text serving as a motto or slogan found in *Public → Home Page Settings → **Moto*** ii. An image that horizontally extends across the screen but has a limited height, which can be configured in *Public → Home Page Settings → **Moto Logo***	If set to "Yes," the container and its contents will be displayed; otherwise, if set to "No," it will remain hidden.
*Displayed product container	This refers to the container that holds all the active and published products that are available.	If it's set to Yes, the container containing its contents will be displayed at the bottom of the home page, just above the Footer. Otherwise, if it's set to No, it will be hidden.
*Displayed name	This refers to the name of the Home Page. For example: Home, Αρχική, Startseite, etc.	We have the flexibility to use our preferred language, and it is displayed within the Event Location Container, positioned above the Google Maps.

*Displayed event location header	This represents the label for the event's location, such as 'Location,' 'Venue,' and so on.	We have the freedom to use any language we prefer. It is displayed within the Event Location Container, positioned above the Google Maps.
*Long description	This refers to the text containing the fundamental event information.	It appears within the header information container and internally within the light gray frame.
Moto	We input a brief text as a motto/slogan for the event.	It is presented inside the moto container.
Moto Logo	We insert an image that stretches along the screen but is constrained in terms of height. Allowed file formats include .jpg, .jpeg, .pjpeg, .png, and .gif.	It is displayed within the moto container against a dark background, repeating horizontally.
*Simple register button display name	We input the registration button label in case we have a registration form for a Participant type. Example: Register, Sign Up, etc.	We have the freedom to use any language we prefer. It appears in the horizontal menu on the right, in the header information container, and in the footer at the bottom left.
*Multiple register button display name Register as:	We enter the registration button label in case we have more than 2 registration forms for more participant types. For example: "Register as:", "Εγγραφείτε ως:" etc.	We have the freedom to use any language we prefer. It appears as an extension button (Drop-down list) containing registration forms in the following places: In the horizontal menu on the right, in the header information container, and in the footer at the bottom left.
*Active time container content	We insert a notification text regarding the registration deadline. For example: Registration expires in:, Οι εγγραφές λήγουν σε: and so on.	It appears inside the time counter container. We have the freedom to use any language we prefer.
*Expired time container content	We enter a notification text regarding the registration expiration. For example: "Registrations have ended.", "Οι εγγραφές έληξαν." and so on.	The notification appears in place of the time counter container when the time runs out. We can use any language we prefer.
*Useful links content	We insert the label text for the useful links on the Home Page and Registration pages. For example: "Useful links:", : " Χρήσιμοι σύνδεσμοι: " or any other preferred language.	It's located in the bottom left corner of the footer, just above the 'Home' and 'Registration' links.
*Find us at content :	We add the label text for the social media links (Facebook, Pinterest, Instagram, Twitter, LinkedIn, Website, TikTok, YouTube). For example: "Find us at:" ,	It appears in the Footer, bottom right, just above the social media links (Facebook, Pinterest, Instagram, Twitter, LinkedIn, Website, TikTok, YouTube). You can use any language you prefer.

	"Βρείτε μας: "or any other preferred language.	

Meta description		You enter the meta tags that assist in SEO (Search Engine Optimization). They are separated by commas.
Meta keywords		
Meta author		
Tag manager id	You enter the tag ID code (Google Tag Manager) of the organizer in the format GT-XXXXXXXXX	Google Tag Manager (GTM) is a free management tool provided by Google. It's a tool that sends data to Google Analytics through defined tags, providing information on how a visitor behaves on a website.

Public → Home Page Settings → Edit Images → Home Page Settings Images

Tutorial video (Home page settings – Slider images)

This section refers to the slider images that cycle behind the subtle white backdrop featuring the **long description**. The images or photos should be provided in jpg, .jpeg, .pjpeg, .png, or .gif formats. To enhance the visual appeal, it's advised that these images maintain dimensions of at least 1400x400 pixels, ensuring good resolution. If multiple images are used, keeping them consistent in size is recommended.

Public→ Home Page Settings→ Edit Articles → Home Page Settings Articles

Tutorial video (Home page settings – Edit Articles)

This tab refers to the content (text, images, etc.) that is positioned and appears on the homepage below the location container and above the footer. In this section, users can insert and modify text, images, links, and other elements, making use of the features provided by the (Editor).

Public → Public Pages → New → New public page

Tutorial video (Public Pages – Create & deactivate)

This section is dedicated to the extra pages within the micro-website, extending beyond the Home Page. Here, we can craft pages enriched with content through the text editor. For instance, we have the freedom to generate distinct pages providing supplementary insights on the Program, Speakers, Sponsors, and more.

New public page

*Name	This refers to the naming of the additional page. For example: Program or Πρόγραμμα.	It appears in the horizontal menu with the name we provided. We can use any language we prefer.
*Active	It refers to whether the page will be active or not.	If it's set to Yes, it will be visible; otherwise, it will be deactivated and won't be displayed.
Meta description		The meta tags that assist with SEO (Search Engine Optimization) are added for this particular page.
Meta keywords		
Meta author		
Editor	This refers to the content of the page.	Using the Editor, you can dynamically input information from the Event sections, such as Event Details, Event Address, and Organizer Details. This is facilitated through the tables labeled "**Available Information for Event**" and "**Available Information for Organizer**" on the right. You can employ the "**Copy on Click**" feature to copy the desired fields and paste them directly into the editor, ensuring the content is seamlessly integrated into the page.

Public → Public Pages → Edit Position → Edit public page position

Tutorial video (Public Pages – Edit Position)

Within this tab, you have the flexibility to modify the order in which pages (micro-web-pages) appear in the horizontal or vertical menu (when viewed on mobile devices). This can be accomplished by utilizing the arrow icons ↑↓ or employing the drag & drop method.

Public → Public Pages → List (Edit)

In this tab, we have access to a list of the public pages we've created, along with a summarized table displaying the following information:

Id	Name	Meta Description	Meta Keywords	Meta author	Active	Actions

To modify a specific public page, simply click the Edit button located within the 'Actions' column."

Administrative Interface - Event Setup

Participant Type 🡻

Participant Type 🡪 New

Tutorial video (Participant Type – New)

In this section, we can create various "participant types" (e.g., Speakers, Volunteers, VIPs, Professionals, etc.) and set specific parameters for each type of participation.

New participant type

*Name	This concerns the name of the Participant Type. It is advisable to use Latin characters, for instance, Participant, VIP, Speaker, and so on.	It is displayed in the application's administrative interface.
*Displayed name	It refers to the public name of the Participant Type. You are free to use any language you prefer.	This label serves as a button in cases where multiple Participant Types are available. It is located on the right side of the horizontal menu within an expandable button marked with an arrow. Clicking on it will unveil a vertical menu containing the names of different Participant Types. By selecting a specific Participant Type's name, you will be directed to the corresponding registration form.
Product description	It refers to a short description of the products to be sold as a title. E.g. Products to buy: , Προϊόντα προς αγορά: etc.We have the flexibility to use any language.	It is displayed as a title above the available products, either on the Success Page (the page displayed after successful registration) or on the Edit Page/ Form (the registration form editing page).
Purchased header	This concerns a concise product description used as a title for purchased items, such as "Already Purchased Items," "Acquired Products," "Αγοράστηκαν" and more. We have the flexibility to use any language of choice.	It is displayed as a title above the acquired products on the Edit Page/Registration Form (the page for editing the registration form).
Form blocks	This refers to the blocks within the registration form. The registration form is comprised of blocks, with each block containing the fields where participants enter their information, provide their responses, and more.	It appears in the following instances: i. Within the registration form of each Participant Type. ii. On the editing form (Edit Page/Form) of each Participant Type. iii. In the application's administrative interface.
*Color	It pertains to the color selection for each Participant Type and is	The selected color is displayed on the screen when we scan a participant's QR code, allowing for quick identification of their Participant Type. For

	associated with scanning the participant's QR code.	example, red indicates VIPs, green signifies Speakers, and so forth..
*Published	It applies to both the registration form and the registration editing form (Edit form) for a particular Participant Type, regardless of its publication status.	When set to 'Yes,' the registration and editing forms for the specific Participant Type are active and accessible. If set to 'No,' they become inactive and inaccessible.
*Visible	This setting applies to the registration form of the specific Participant Type, determining whether it will be publicly visible or hidden.	When set to 'Yes,' the registration form of the particular Participant Type is publicly displayed on the micro-website, alongside others. If set to 'No,' it remains hidden, requiring the organizer to provide the URL for access.
Success description	This pertains to the successful registration message content for participants, with any available products displayed directly below.	The Success Page is shown after submitting the entry form. It's generated using an editor that allows for personalization with elements from the Event and those submitted by the registered participant.
Out of stock text	It relates to a notification message for product availability exhaustion.	It is displayed above the product block on both the Success Page and the Edit Page. If no text is entered, it remains hidden.
Register description	This refers to the pre-registration message content for participants.	It is located at the top of the registration form for that Participant Type and is created using the text editor.
*Display register description	It concerns the display of message content in the registration form.	If set to 'Yes,' it will be shown; otherwise, it will be hidden.
Edit description	It pertains to the message content on the Edit Page/Form for submitted fields, which participants can visit after registration to make edits.	It is positioned at the top of the Edit Page/Form for the specific Participant Type and is created using the Editor.
Display edit description	It refers to whether the message-content will be displayed on the Edit Page or not.	If it is Yes it will be displayed otherwise it will be hidden.
*Number of products up to	It sets the maximum number of different products a participant can purchase, specified as a positive integer.	"Participants can buy only one product of the same type, but they can purchase multiple different types of products, up to the limit specified in the field. For example, if the limit is set to 3, they can purchase up to 3 different products, with a restriction of only one product from the same category.

Participant Type → List (Edit)

Tutorial video (Participant Type – List -Edit)

This tab provides an overview of all created Participant Types and displays the selected settings, including:

Id	Name	Disp.Name	Form Blocks	Color	Display Reg. Dedcr.	Display Edit Descr.	Published	Visible	Actions

To edit a Participant Type, simply select it and click the Edit Edit' button in the Actions column.

Product ↓

Tutorial video (Product - List & New)

The Product tabs include events with a restricted number of available seats, as well as those that involve a financial transaction.

Product → New → New product

The Product tabs are relevant to events with limited seating and financial transactions.

New product

*Name	It refers to the Product name.	This name will appear in the admin application.
*Label	Refers to the public name of the Product.	This name will be displayed on the micro-website after successful registration.
*Capacity	Maximum number of products to be made available.	When the availability number reaches the capacity number, the product is considered sold out and can no longer be purchased publicly.
Description	Short product description. (Up to 1000 characters)	It is publicly displayed as part of the Product.
*Description to be displayed	It's about whether the description will be displayed or not.	If it is Yes the description will be displayed otherwise it will be hidden.
*Currency	It's about currency selection.	The currency selected for the transaction will be publicly displayed.
*Status	This relates to the required Status for participants to acquire the Product. Different Status levels determine eligibility for obtaining the Product, and the available options are: Τα Status προς επιλογή είναι: i. Unconfirmed ii. Pending iii. PreApproved	Based on the selected Status, the Product's display and accessibility vary as follows: i. **Unconfirmed.** The product is visible immediately after registration on the Success Page. Registrants can purchase it directly without confirming their email via a confirmation link. **ii.** **Pending.** The product isn't visible right after registration but becomes accessible on the Edit Page after the registrant confirms their email through a confirmation link.

	iv. Approved	**iii. PreApproved.** The product doesn't appear immediately after registration but becomes accessible on the Edit Page once the organizer pre-approves the registrant and designates them as 'PreApproved.' **iv. Approved.** The product doesn't appear immediately after registration but becomes accessible on the Edit Page after the organizer approves the registrant and marks them as 'Approved'.
*Active	It refers to whether the Product is active.	When set to "Yes," it is shown for disposition; otherwise, it remains hidden.
*Published	It refers to whether the Product has been published for availability.	If "Yes," it is made available. If "Active" is "Yes" and "Published" is "No," then the product can only be granted through the administration and the organizer.
*Start date	It refers to the publication date.	Starting from this date, the product is accessible for public purchase.
*Dead line	It refers to the date of publication cessation.	Beginning from this date, the product is not available for public purchase.
*Price	It's about the price of the Product.	The price is shown as a combination of the product's base price and the amount specified in the Fee field.
Fee	Refers to cumulative fee consideration in the Product.	The fee is added to the product price, resulting in a total price displayed on the product, which includes both the base price and the fee.
*Refund	It concerns the compensation value in case of cancellation of the purchase of a Product.	It doesn't appear automatically anywhere; it serves as an internal note for the organizer, specifically for potential refund purposes, with no other current use.
*Purchase button caption	It refers to the name of the button to acquire the product. Ex: Αγορά, Buy, Book, etc	The product is displayed as a whole. We have the flexibility to use any language.
Participant types	It refers to the selection of the Participant Type/s where the Product is available.	It's available for selection exclusively for the specified Participant Types, both in the public interface and within the application's administrative settings.
Product Logo	It is about the product logo , which should be in image file format (.jpg / .jpeg / .pjpeg / .png / .gif). The image file name must be in Latin characters and without spaces.	It is visible within the Product Container on the left-hand side.

Product → List (Edit)

Tutorial video (Product - List & Edit)

This tab displays a list of all the products we have created and provides a concise overview of the selected settings. Specifically, it shows us:

Id	Name	Label	Capacity	Price	Fee	Total Price	Refund	Currency	Status	Published	Active	Type	Start Date	Dead Line	Actions

To edit a product, simply select it and click the **Edit** button in the Actions column.

Product → Payments

Tutorial video (Product - Payments)

This tab lists both Stripe payments made for product acquisitions and payments transferred out of Stripe. It provides a brief overview of the following:

Id	Participant	Products	Price	Currency	Status	Payment Type	Online	Card Name	Email	Amount	Phone Number	Address1	Address2	Postal Code	City	Country	Vat	Business Name	Tax Id	Actions

If you wish to make partial edits to a payment, simply select it and click the **Edit** button.

Product → Stripe → Stripe Details

Tutorial video (Product - Stripe)

Stripe is a payment service provider that allows professional organizers to accept credit and debit cards or other payments. GatherNext's app has integrated Stripe Checkout to make it easy for organizers to collect money directly into their Stripe account and send a transaction receipt directly to the buyer. Attention: The Service does not concern the issuance of a receipt or invoice with or without VAT for tax purposes.

For further information about Stripe, you can visit the following link: Stripe Documentation

The Stripe Checkout payment page is presented when a visitor selects a product, typically by clicking the "Product Acquisition" button.

Stripe Details

This involves configuring the settings and linking with Stripe to enable communication between the GatherNext application and the organizer's Stripe account. It also includes choosing the method for handling VAT collection. Funds collected are routed directly to the organizer's Stripe account, with legitimate deductions made by Stripe's platform.

Stripe offers two tax collection methods: Stripe Tax and Tax rates.

*Stripe tax enabled	This refers to an automated method of tax collection that is configured through Stripe. It is automatically calculated based on the services provided by the organizer's company.	If set to "Yes," it is applied on the Stripe payment page (Check Out), otherwise, VAT collection is calculated separately.

*Stripe tax behavior	This refers to whether VAT will be included in the total value of the product (Inclusive) or if it will be added separately to the total value of the product (Exclusive).	With VAT (Inclusive) + VAT (Exclusive)
*Collect Vat ID	This refers to whether the business name and tax identification number (Tax ID) will be collected on the Check Out payment page.	If set to "Yes," a field will be displayed during the Check Out process, enabling registered participants to make a business purchase by providing their Business Name and Tax ID. **The organizer should verify the accuracy of these details before issuing an invoice or receipt.**
*Collect phone number	This relates to whether the buyer's contact phone number should be provided on the Check Out payment page.	If set to "Yes," a mandatory field for entering the buyer's phone number will be displayed during the Check Out process. Otherwise, it will remain hidden.
*Collect billing address	This concerns whether a postal address will be collected on the Check Out payment page.	If set to "Yes," a mandatory field for entering the buyer's postal address will be displayed during the Check Out process. Otherwise, it will remain hidden.
Tax rate id	Enter here the code generated in Stripe when creating a tax rate. Tax rates allow for the definition of multiple tax rates. This doesn't change automatically and is configured through the organizer's Stripe account. **Important Note:** This field is active only if the "Stripe Tax Enabled" field is set to "No," and a "Tax Rate ID" code has been entered as well.	The VAT rate is applied on the Stripe payment page (Check Out) based on the configuration within the organizer's Stripe account. If it is not activated, the payment is processed without collecting VAT.
Public key	This refers to a secret Stripe code from the organizer's Stripe account.	It is an essential key for connecting the app with the organizer's Stripe account.
Secret key	This refers to a secret Stripe code from the organizer's Stripe account.	It is an essential key for connecting the app with the organizer's Stripe account.
Create Webhook	This is about enabling the interface between the organizer's Stripe app and their Stripe account.	By clicking on it, a Webhook is generated in the organizer's Stripe account once all the aforementioned fields have been filled in correctly. This facilitates communication between the two applications.
Delete Webhook	This is about enabling the interface between the organizer's Stripe app and their Stripe account.	Clicking it removes the previously mentioned Webhook from the organizer's Stripe account. This will disrupt communication between the two applications.

		Important Note: Deletion of the Webhook should be carried out within the application and not through the Stripe admin interface.

Attention: If the key codes are not entered from the organizer's Stripe account, registrants can only acquire products with a zero value.

Form

This relates to the process of establishing registration fields and forms.

Form → Form Preview

Tutorial video (Form - Preview)

From this tab, the user can view how the registration form appears in the application's admin interface, depending on the Participant Type they select. There are variations in how the Choice fields are displayed on the form in comparison to the micro-website.

Form → Form Blocks

Tutorial video (Form – Form Blocks -New)

Tutorial video (Form – Form Blocks -Edit)

Tutorial video (Form – Form Blocks – New & Delete)

Every form should include at least one Form Block. The Form Block serves as the container for the fields we create to gather data from prospective participants.

New form block

*Name	It's about the name of the Form block.	We have the flexibility to use any language. It appears as the title of the block that contains the fields we've inputted.
*Name to be displayed	It is about whether to display the name publicly or not.	If set to "Yes," it will be displayed as the title and description of the Form block; otherwise, it will remain hidden.
*Visible	This is regarding the decision to either display or hide the Form block on a public registration form. You can choose between the following options: i. Registration form ii. Edit form iii. Both iv. None	Here are the options and their effects: i. **Registration form** If you choose "Registration form," the Form block and its fields will only appear on the registration form. ii. **Edit form** If you choose "Edit form," the Form block and its fields will only appear on the rediting form (the Edit page/form). iii. **Both**

		If you select "Both," it will appear on both forms (Registration and Edit). iv. **None** If you choose "None," it will not appear on any public form. Regardless of the chosen option, the Form block with its fields will be visible in the application admin (*Form* → ***preview*** και ***Edit participant***)
Participant type	This refers to specifying which Participant Type this Form block will be associated with.	It is exclusive to a single Participant Type and is distinct for each Participant type.

Each field (Form Field) that we create can only be placed within a Form block, and it can appear in the registration form of the same Participant Type, as well as in various Form blocks of different Participant Types.

Form Block → Position

If you create multiple Form Blocks and wish to change their order of priority, you can achieve this through the tab:

Participant Type → *List* → *Position* → ***Edit participant type position***

by using the arrows ↑ ↓ or the drag & drop method.

Form Field position in Form Block

The position and order of the fields in the registration form and especially in the Form Block is determined by the

Form → *Form Blocks* → *Position* → ***Edit form block position***

by using the arrows ↑ ↓ or the drag & drop method.

Form → Form Field Position

This tab refers to the arrangement and display order of the fields we've created in both the export (Excel / CSV) and the Participant list. You can adjust their position using the arrows ↑ ↓ or the drag & drop method.

Hence, based on the order we define, the fields will be visible in both

Participant → *Export* → ***Csv/Excel*** καθώς και στο *Participant* → ***List.***

If you create multiple email fields, the **primary email** used for correspondence will be the one that appears first in the **Form Field Position**.

Important Note: The arrangement and sequence of the fields in the registration form, particularly within the Form Block, are determined by the settings in:

*Form → Form Blocks → Position → **Edit form block position***

Form fields (Email, Url, Number, PhoneNumber, Text, TextArea, DateTime, Data, Time, File, Country, Language, Choice, Matrix, and Choice Lists)

This refers to the creation and configuration of fields that are imported or housed within Form Blocks.

Email

Tutorial video (Form - Email fields - General settings)

Form → Email fields	This refers to an email field (e-mail).	If you create multiple email fields, the primary one used for correspondence will be the one that appears first in **Form → Form Field Position.**
*Name	This relates to the field name. The field name can only include Latin characters, numbers, underscores (_), hyphens (-), and colons (:). It cannot be left blank. **(Applicable to all fields)**	It is only visible in the application manager, specifically in the *Participant → **List*** if this option is also enabled.
*Label	It refers to the public label of the field. **(Applicable to all fields)**	The public label of the field will be displayed above the input field for the public to see if this option is enabled.
*Confirmation label	This concerns the public label associated with the email account verification field. **(Applicable only to email field)**	The email field will consistently display two input fields within the form. In both fields, the same email address should be entered for verification purposes. It will be visible to the public form above the email verification field.
Placeholder	This refers to the "placeholder" text inside the field, typically provided as an example for filling it. **(This applies to all fields except File fields.)**	It will be visible if some text has been entered.
Description	This refers to the description provided for the field, such as instructions on how to	It will be displayed below the field with the letter "i" on the left, where "i" signifies information.

	complete it or additional clarifications. **(Applicable to all fields)**	
*Published	It's about whether the field will be shown to the public. **(Applicable to all fields)**	If set to "Yes," the field will be visible; otherwise, it will be hidden.
*Required	It refers to whether the field will be mandatory. **(Applicable to all fields)**	If set to "Yes," the field will be mandatory to complete in order to submit the form. A red star (*) will appear next to the Label to indicate its mandatory nature. If the form is not filled out and submitted, a corresponding error message will appear below the field.
*Scanable	This concerns whether the value of the field will be visible during the scanning process. (Note: **This applies to all fields except for Text Area and Url fields.)**	If set to "Yes," during the scanning of the QR code of the registered participant, the value of the field will be displayed on the screen in the order defined in *Form* → ***Form Field Position***.
*Visible	This is about whether the field will be shown in a public registration form or kept hidden. You can choose from the following options: i. Registration form ii. Edit form iii. Both iv. None **(Note: This is applicable to all fields.)**	Here are the options and their effects: i. **Registration form** If you choose "Registration form," the field will only appear on the registration form. ii. **Edit form** If you select "Edit form," the field will only appear on the editing form (the Edit page/form). iii. **Both** If you opt for "Both," it will be visible on both forms (Registration and Edit). iv. **None** If you pick "None," the field will not be displayed on any public forms. Regardless of the chosen option, the field will be visible in the application management **(Form → preview** and **Edit participant**).
*Constraint for user	This refers to whether the restrictions (uniqueness / mandatory) that we configure for the field will also be applicable to the organizer	If set to "Yes," all the restrictions we define for the fields will also be enforced for the User. In other words, a mandatory (required) field cannot be left blank during the registration of a participant by the organizer through the application's administration.

	(User) when registering a participant through the application's administration. (Note: **This applies to all fields.**)	Likewise, a value cannot be repeated in a field if uniqueness is specified.
*Label to be displayed	This refers to whether the public label will be visible. (Note: **This is applicable to all fields.)**	If set to "Yes," the label of the field will be visible; otherwise, it will be hidden.
*Description to be displayed	This determines whether the field description will be shown or not. (Note: T**his applies to all fields.)**	If set to "Yes," the field description will be displayed; otherwise, it will be hidden.
*Editable by visitor	This pertains to whether the field can be edited after entering and submitting information. (Note: **This is applicable to all fields.)**	If set to "Yes," the field can be edited a second time by the registered participant through the Edit page. Otherwise, it will not be editable further.
*Label to be displayed on list pages	This relates to whether we want the field to be included in the list (Participant → List) of the administrative application. (Note: **This is common to all fields except TextArea**.)	If set to "Yes," the name of the field will be included in **Participant → List** and will appear in the order defined in **Form → Form Field Position**.
Form blocks	This refers to the selection of the Form block where we wish to position the field. (Note: **This applies to all fields.)**	The field will be placed within the selected Form block.
*Value unique	This relates to whether we desire the value of the field to be unique in relation to other participants. (Note: **This does not apply to the following field types: Country fields, Language fields, Choice fields, Matrix fields, Date fields, DateTime fields, Time fields, File fields, and Text Area fields**.)	If set to "Yes," the system will not accept a second instance of the same value in this field from another participant, and form submission will not be completed. A corresponding error message will appear below the field. This is primarily used for fields like emails, identity numbers, VAT numbers, etc.

URL

Tutorial video (Form - Url fields)

Form → Url fields	This pertains to an email address field and Uniform Resource Locators (URLs).	For a URL field to be accepted during form submission, the prefix (pathinfo) must be in the form of "http" or "https."
The field encompasses all the standard settings.		

Number

Tutorial video (Form - Number field)

Form → Number fields	This pertains to a number field.	
The field contains the common settings that apply to all fields and an additional three:		
*Max value	The maximum number of inputs allowed for this field.	If the value entered is greater than the upper limit, an error message will be shown during form submission.
*Min value	The minimum number of entries required for this field.	If the value entered is less than the lower limit, an error message will be displayed upon form submission.
*Scale	This refers to the scale or arrangement we desire for the decimal digits.	If the scale is set to 1, a number with tenths can be entered. If the scale is 2, a number with hundredths can be entered, and so on.

PhoneNumber

Tutorial video (Form - PhoneNumber fields)

Form → PhoneNumber fields	This pertains to a telephone number field, whether it's for a mobile or a landline number.	
The field includes the standard settings that are applicable to all fields, as well as two additional settings:		
*Type	This is about identifying the phone number as mobile, landline, or both.	It's possible that the number of digits in a landline phone number and a mobile phone number may vary depending on the country.
*Widget type	This pertains to whether we will opt to input the prefix for the country's telephone number or if the applicant will select the prefix from a predefined list.	It will be displayed either as a number input field or as a dropdown button with a list of country prefixes, along with a second field for entering the phone number.

Text

Tutorial video (Form - Text fields)

<table>
<tr><td>Form → Text fields</td><td>This pertains to a short text field.</td><td>Up to 255 characters are allowed</td></tr>
<tr><td colspan="3">It includes the standard settings that apply to all fields and two additional settings:</td></tr>
<tr><td>Text transform</td><td>This is about the conversion of characters entered in the field, which can be set to:

i. UPPERCASE
ii. Capitalize
iii. lowercase
iv. None</td><td>i. UPPERCASE
Letters are converted and displayed in uppercase.

ii. Capitalize
The first letter of each word is converted to uppercase, and the rest are in lowercase.

iii. lowercase
Letters are converted and displayed in lowercase.

iv. None
Letters appear as entered without any conversion.</td></tr>
<tr><td>Latin only</td><td>This pertains to a restriction that allows the field to accept only Latin characters and the following symbols:

a-zA-Z0-9 ()*_\-!#$%^&*,.`~@?:;>\/<€£=|\{}+"'[]</td><td>If a character or symbol other than those allowed is entered in the field during form submission, the following error message will appear:<br><br>!Only the following characters are allowed. (a-zA-Z0-9 ()*_\-!#$%^&*,.`~@?:;>\/<€£=|\{}+"'[])</td></tr>
</table>

TextArea

Tutorial video (Form - TextArea fields)

<table>
<tr><td>Form → TextArea fields</td><td>This refers to a text area field.</td><td>Up to 5000 characters are allowed</td></tr>
<tr><td colspan="3">The field encompasses all common settings, with the exception of three: Scannable, Label to be displayed on list pages, and Value uniqueness. The TextArea field inherits the settings of the Text field, including Text transform and Latin-only, and adds two additional settings.</td></tr>
<tr><td>*Resize</td><td>This pertains to whether resizing is permitted when filling out the form.</td><td>Vertical resizing is allowed regardless of our choice. This setting is disabled.</td></tr>
<tr><td>*Rows</td><td>This relates to the number of blank lines that we want to initially appear in the field for filling out the form.</td><td>It will be displayed as a free text field with as many lines as we specify.</td></tr>
</table>

DateTime

Tutorial video (Form - DateTime fields)

Form → DateTime fields	This pertains to a date field that includes hours and minutes.	
The field includes the standard settings that apply to all fields, except for the "Value unique" setting. The DateTime field has two additional settings:		
*From date	From this date onwards.	A date and time selection from the date set and after.
*To date	By this date and earlier.	A date and time selection from the date set and earlier.

Date

Tutorial video (Form - Date fields)

Form → Date fields	This pertains to a date field.	
The field includes the standard settings that apply to all fields, with the exception of the "Value unique" setting. The DateTime field has two additional settings:		
*From date	From this date onwards.	A date selection from the date set and after.
*To date	By this date and earlier.	A date selection from the date set and earlier.

Time

Tutorial video (Form - Time fields)

Form → Time fields	It concerns time field.	The time to select is displayed.
The field includes the standard settings that apply to all fields, except for the "Value unique" setting. The Time field has two additional settings:		
*With minutes	This is a time field that includes minutes.	If it's set to "Yes," the minutes that can be selected will also be displayed.
*With seconds	This is a time field that includes minutes and seconds.	If it's set to "Yes," the seconds that can be selected will also be displayed.

File

Tutorial video (Form - File fields - File)

Tutorial video (Form - File fields - Image)

Form → File fields	It refers to **File** or **Image** field.	The maximum allowed limit is 8MB per file/image. If the limit is exceeded, an error message will appear below the field during form submission.
The field includes the standard settings that apply to all fields, with the exception of the "Placeholder" and "Value unique" settings. The File field has an additional setting:		
*Type	**It depends on whether we will choose File or Image**	Once this field is selected as either a file or an image, it cannot be changed to accept the other type.

	If we choose a file (File) then the files allowed to be submitted in the form must end in: .csv, .doc, .docx, odm, .ods, .odt .pdf, .rtf, .rtx, .sxc, . txt, .xls, .xlsx, zip. AIf you choose "Image," the files allowed to be submitted to the form must end in the following extensions: .jpg, .jpeg, .pjpeg, .png, .gif.	If an unauthorized file type is entered, an error message will appear below the field when submitting the form.

Country

Tutorial video (Form - Country fields)

Form → Country fields	This pertains to the country selection field.	
The field includes the standard settings that apply to all fields, with the exception of the "Value unique" setting.		

Language

Tutorial video (Form - Language fields)

Form → Language fields	This pertains to the language selection field.	
The field includes the standard settings that apply to all fields, except for the "Value unique" setting.		

Choice

Tutorial video (Form - Choice fields & Choice Lists)

Tutorial video (Form - Choice fields & Choice Lists - New)

Form → Choice fields	This pertains to a choice field.	
The field includes the standard settings that apply to all fields, except for the "Value unique" setting. Additionally, the selection field has four extra settings.		
Choice list	A selection is made from the list of available options in the Choice field.	
*Multiple	This pertains to whether multiple answers are allowed in the given field.	If set to "Yes," the registration form will permit multiple answers for this field. If set to "No," only one answer will be allowed.

*Appearance	It pertains to how the list of options will be presented: as checkboxes or as a dropdown list with an expandable button.	If you choose checkboxes, each option will be displayed with a circle on the left. If multiple answers are allowed, checkboxes will be replaced by squares. If you choose a list, clicking the dropdown button will reveal the available options.
Max	It refers to the maximum number of options or answers that can be selected when the "**Multiple**" option is set to "Yes."	If more answers are selected than the maximum allowed (Max), an error message will appear below the field when the form is submitted.
Min	If the field is set as both mandatory (**Required → Yes**) and allows multiple answers (**Multiple→ Yes**), this setting specifies the minimum number of options/answers that must be selected.	If the required minimum is not met, an error message will appear below the field when the form is submitted.

Matrix

Tutorial video (Form - Matrix fields & Choice Lists)

Form→ Matrix fields	It refers to a matrix field.	"Mobile Table Scroll Indicator" No matter how large the table is in terms of columns, mobile visitors will see a hand pointing to swipe the screen to the right, prompting them to view all the table columns.
The field contains the common settings that apply to all fields except the Value unique setting. The Matrix fields field has five additional settings:		
*Question list	This pertains to selecting questins from the list of choices (Choice list).	It will be displayed as the first column of the table, and the cell (a11) will be empty. Please note that you need to create a list of questions in the Choice list before using this field
*Answer list	This pertains to selecting answers from the list of choices (Choice list).	It will be displayed as the first row of the table, and the cell (a11) will be empty. Please note that you need to create a list of answers in the Choice list before using this field
*Multiple	It's about the maximum number of choices.	Αν είναι Yes τότε μέσα στον πίνακα αντί για κυκλάκια εμφανίζονται τετραγωνάκια.
Max	This setting defines the maximum number of choices a	If a participant exceeds this maximum, an error message will appear upon form submission.

	participant can make in the matrix field	
Min	This setting determines the minimum number of choices that must be made in the matrix field if the "Multiple → **Yes**" option is enabled, and the field is set as required (**Required → Yes**) .	If the participant does not select at least this many choices, an error message will appear when they submit the form

Choice List

Form → Choice Lists → +New

This setting allows you to create a list of options for a Choice field or Matrix field. It's where you define the possible answers or choices that participants can select when filling out the field.

*Name	This setting pertains to giving a name or title to the list of options.	It's a way to identify and categorize the list for easy reference when selecting options for the field.
Form field choices	This setting establishes the link between a Choice field, Matrix field question list, or Matrix answer list	It connects the options you've created in this setting to the respective field or question/answer list, allowing participants to select from these options when filling out the form.
Choices	Create options	+

Mail↓

Mail → New → New participant mail

Tutorial video (Mail - List - New)

Tutorial video (Mail - Insert QR code - Confirmation /Edit Link Url - Logo - Image - field)

This tab is about creating emails using a text editor (editor).

Edit participant mail

*Name	Email Name	The "Email Name" serves as the internal identifier within the application, visible in both the admin section and under *Participant* **→ *List***
*Type	Participant Type selection	These emails are exclusively related to the specific Participant Type. However, as previously mentioned, they can also be sent in bulk to other Participant Types through the *Participant* **→ *List***

Event	Status selection for the participant type.	The "Status" option is directly associated with the "Automated" field located below it.
*Automated	Email automation based on Status.	If the "Automated" option is set to "Yes," the specific email will be automatically sent when the participant's status changes to the one chosen in the event field. For instance, if the initial status is "Unconfirmed," and when a visitor completes a registration, the registration status changes to "Unconfirmed," the email will be automatically triggered and sent to the participant (recipient) based on the email settings.
*Include content as pdf	This pertains to whether we wish to include the email's content as a PDF attachment, essentially rendering the content generated in the text editor as an attachment to the email.	If you select "Yes," the email content will be presented as an attachment in PDF format, making it readable from the PDF. If you choose "No," the attachment will be skipped. This option is useful in cases where the email content might be challenging to read due to character compatibility issues with the user's web browser.
Cc	Carbon Copy	When you use the CC field, you're sending a copy of the email to the recipients listed there, but all recipients can see who the other recipients are. It's typically used to keep people informed or to provide a copy of the email for reference, without necessarily making them primary recipients.
Bcc	Blind Carbon Copy	BCC is an email feature that lets you send emails to multiple recipients without revealing their addresses to each other. It's used for privacy, preventing reply-all mishaps, and reducing spam or phishing risks.
Subject	Email subject	The subject is displayed in the recipient's email.
Body	This pertains to the email content, which is generated using a text (editor). On the right side of the page, there is a column with the following sections: 1. Available Information for Event 2. Available Information for Organizer 3. Available Information for Participants 4. Available Form Fields for Participant You can insert the information under each heading into the editor by copying and pasting, allowing you to configure personalized emails.	The email content appears to the recipient exactly as we create it. It's advisable to conduct a few trial tests before finalizing it to ensure optimal results.

Attachments [+]	You can attach files that are smaller than 8MB to emails. The allowed file formats include: .7z, .csv, .doc, .docx, .dotx, .mdb, .mpp, .odc, .odf, .odft, .odm, .odp, .ods, .odt, .odt, .otc, .otp, .ots, .ott, .pdf, .potx, .ppsx, .ppt, .pptx, .psd, .pub, .rtf, .rtx, .stc, .sti, .stw, .sxc, .sxg, .sxi, .sxm, .sxw, .txt, .vcf, .xls, .xlsx, .xltx, .zip.	If you attempt to upload a file that exceeds 8MB in size or is in a format that's not allowed, an error message will be displayed.
Email attachments	This pertains to the selection of personalized attachment files in PDF format, which are created in the **Mail→ New Email Attachment.**	The personalized files in PDF format, such as attendance certificates, participation certificates, badges, etc., are presented as email attachments.

Mail → List (Edit)

This tab provides a comprehensive list of all the emails we have created and offers a concise overview of the settings we have selected. It specifically displays:

Id	Name	Type	Auto. Send	Include as pdf	Participant Event	CC	Bcc	Subject	Actions

If you wish to edit an email, simply select it and click on the Edit button located in the Actions column.

Mail → Transmitted

This tab displays a comprehensive list of all the emails that have been sent. It provides specific information, such as:

Id	Name	Recipient	Subject	Include as pdf	Updated at	Status	Actions

If you wish to view a sent email and review the relevant sending information, simply click on the Show button in the Actions column. The "Status" field will indicate whether the email is pending (Pending), has been successfully sent (Successful), or if the sending failed (Failed).

Mail → New Email Attachment

Tutorial video (Mail - List and New Email Attachment)

In this tab, you can generate personalized attached files in PDF format, such as attendance certificates, certificates of participation, badges, and more.

*Name	Name of attachment	This name is displayed in the recipient's email.
*Type	Επιλογή Participant Type	Αφορά μόνο τον συγκεκριμένο Participant Type.

*Orientation	You can choose the PDF orientation from the following options: 1. PORTRAIT (Vertical) 2. LANDSCAPE (Horizontal)	Based on your selection, the PDF is presented as an email attachment either in a vertical (portrait) or horizontal (landscape) orientation.
Body	This pertains to the content of the attached file, which is generated using a text editor (editor). On the right side of the page, you will find a column with the following sections: 1. Available Information for Event 2. Available Information for Organizer 3. Available Information for Participant 4. Available Form Fields for Participant You can insert the information under each heading into the editor by copying and pasting, which allows you to create personalized emails.	The attached file appears to the recipient as a PDF exactly as it's created. It's advisable to perform a few trial tests before finalizing to ensure optimal results.

Mail → List Email Attachment (Edit)

This tab provides a list of all the email attachments (attached files) that have been created and offers a brief overview of the settings that have been selected. Specifically, it displays:

Id	Name	Type	Actions

If you wish to edit an attached file (Email Attachment), simply select it and click on the **Edit** button in the Actions column.

Mail → Smtp Email Provider Settings

Tutorial video (Mail - SMTP Email Provider Settings)

Smtp Email Provider Details

This tab enables the organizer to input their email provider's Simple Mail Transfer Protocol (SMTP) credentials, allowing emails to be sent through their official account and provider. To deactivate this feature, please get in touch with the GatherNext administrator.

*Host	Mailer Host	E.g. smtp.gmail.com
*Port	Mailer Port	E.g. 587
*Username	Mailer User	E.g. youremail@gmail.com
*Password	Mail Password	E.g. ****************
*Encryption Type	Επιλογή από τη λίστα (SSL / TLS / STARTLS)	E.g. SSL
*Auth Mode Type	Please choose from the following options in the list: (LOGIN / PLAIN / MD5 / CRAM-MD5 / DIGEST-MD5 / OAUTHNEARER / XOAUTH2 / XOAUTH)	E.g. LOGIN
*From email	Email From	E.g.: youremail@gmail.com

The recipient, irrespective of their email provider or the sender's email, sends reply emails to the organizer's email from their own account. In other words, the "**Reply**" function directs the email to the organizer's email address, as specified in the **Public→ Organizer Details** tab within the **Email field**.

Badge ↓

Badge → New

Tutorial video (Badge - List and New)

Participant badge

This tab pertains to the unique tags that carry the identifiers of the event's visitors (participants). The design of these tags is accomplished using the text editor (editor).

*Name	Badge name	This feature is exclusively visible in the administrative section of the application.
*Participant type	Participant Type selection.	Each badge is associated with a specific Participant Type.
*Used	This pertains to whether the badge is currently active or inactive.	If set to "Yes," it means that this badge is automatically the sole active badge for the specific Participant Type. Even if you have designed multiple badges, only one of them can be active at a time.
*Automatically print	This relates to the automatic printing of the badge when the participant's QR code is scanned.	If set to "Yes" and under the following conditions: i. There is an active badge for this Participant ii. The participant's status is "Approved."

		In this case, when the participant's QR code is scanned, the browser's print window will be activated, displaying a preview of the badge to be printed. It is recommended to use a laptop or PC for this feature rather than a mobile or tablet.
Body	This relates to the content of the badge, which is generated using a text editor. On the right side of the page, there is a column with the following sections: 1. Available Information for Event 2. Available Information for Organizer 3. Available Information for Participant 4. Available Form Fields for Participant You can insert the information under each heading into the editor by copying and pasting, allowing you to configure personalized badges.	The participant will only view the badge after it has been printed. It's advisable to conduct a few tests with the printer you intend to use for the best results.

Badge → List (Edit)

This tab provides a list of all the badges (tabs) that have been created and offers a brief overview of the settings that have been selected. Specifically, it displays:

Id	Name	Type	Used	Aut. Print	Participant Event	Actions

To edit a badge, simply select it and click on the **Edit** button located in the Actions column.

Participant ↓

Participant → New...("Participant's Type Name")

Tutorial video (Participant - List - New)

Tutorial video (Participant - Edit - Overview)

Tutorial video (Participant - Edit - Send Mail)

Tutorial video (Participant - Edit - Book / Cancel Product)

Tutorial video (Participant - Edit - Scan on Click)

Tutorial video (Participant - Edit -Print)

Tutorial video (Participant - Edit - Comments)

Tutorial video (Participant - Edit - History)

Participant → New Participant (E.g. Speaker) **→ New Participant**

This feature pertains to the real-time input of registrations by the organizer through the application's administration.

The fields in the participant's registration form are completed, and the Status is selected. If there is an automated email associated with this Participant Type and Status category, it will be activated and sent immediately when we click the "Save" button to complete the registration.

Upon finalizing the registration, you will be redirected to the **Edit participant** page, which displays the information from the registration you have just entered.

Right away, the "**Edit participant**" page presents the options for **Type** and **Status**, along with the **General Information**, **Extra information**, and the following buttons:

List	History Log	Send mail	Book A Product	Scan
Print	+New	Save	Delete	

You can also access the "**Edit participant**" page by navigating through **Participant → List→ Edit** using the "Actions" column on the specific record line that you wish to edit.

<u>Edit participant.</u>

This pertains to the processing and management of individual participant registrations.

In detail:

The buttons:

List	This option allows you to directly access the list of records in the **Participant→List** section	By clicking this button, you will be directed to the list of participant entries in the **Participant→List** section**.**
History Log	This pertains to the history of any modifications or changes made to the fields in the registration-participant form.	Newly added elements are highlighted in green, while elements that have been removed are displayed in red.
Send mail	Send email	This feature allows you to select emails from a list that are related to the Participant Type of the registration-participant. By clicking the button, only the emails associated with the specific Participant Type will be shown. You can choose an email from the list and press the "Send" button to send it.
Book A Product	Product registration allows each product to be registered only once within the same registration.	This feature enables you to choose products from a list that are associated with the Participant Type of the registration-participant. When you click the button, only the products linked to the specific Participant Type will be displayed, provided that the product is marked as "Active" **Active→Yes** and there is availability (**Available** $\geq$ **1.**). By selecting a product and clicking the "Book" button, the entry will be made. **Each registration is limited to obtaining the same product only once, and once it's acquired, it becomes unavailable to the same registrant.**
Scan	Scanning	You can scan the registration-participant by clicking the button without the need for a camera.
Print	Print	You can individually print a badge if it exists and is active in the Badge tab.
+New	Create a new registration	This action will redirect you to the **Participant→ New Participant (Participant Type)→ New Participant Type**
Save	Saving Changes	Please make sure to save any changes you've made before navigating to a different page, as otherwise, they may be lost.
Delete	Delete registration-participant	Permanent deletion of registration – participant.

Options:

Tutorial video (Participant - Edit -Type)

Tutorial video (Participant - Edit - Status)

Type	This refers to changing the Participant Type for	This feature allows for the change of the Participant Type. It presents a list of all the Participant Types that have been created. When you

	the registration of a participant.	change the Participant Type of a participant, for example, from VIP to Speaker, the new registration form associated with the new Participant Type (Speaker) will retain the completed common fields from the previous Participant Type (VIP). As a result, if you revert the participant to their original Participant Type (VIP), all the information they provided will still be available in their form, as if nothing had changed. However, if there are mandatory fields in the registration form that are left unfilled during the change, the modification can only be completed once those fields are filled in. Alternatively, you can perform this change from the Participant list by selecting the registration, then clicking the "Type" button and using the group management method for the record.
Status	Each registrant is associated with a specific Status, and the available Statuses include: i. Unconfirmed ii. Pending iii. Recheck iv. OnHold v. RePending vi. PreApproved vii. Approved viii. Refused ix. Cancelled The organizer or administrator has the ability to change the Status of a registrant at any time through the admin interface. It's worth noting that some Statuses come with automations. Furthermore, registered participants with the following Statuses do not have access to the Edit Page: i. Unconfirmed ii. Refused iii. Cancelled	i. Unconfirmed Automatically assigned as the initial Status upon registration submission. ii. Pending Automatically assigned once the subscriber confirms their email by clicking a confirmation link sent via email. This change occurs from Unconfirmed to Pending. iii. Recheck Automatically triggered. It switches from PreApproved to ReCheck when a PreApproved registrant makes any changes to their registration fields using the Edit Page. iv. OnHold A manual Status chosen by the organizer to designate participants as standby or pending further action. v. RePending Automatically triggered. It changes from Approved to RePending when an Approved registrant edits at least one registration field through the Edit Page. vi. PreApproved. A manual Status used by the organizer to pre-approve specific participants. vii. Approved

		Automatically assigned when a subscriber acquires a product. Regardless of their previous Status, it becomes Approved after product acquisition. viii. Refused A manual Status selected by the organizer to indicate a refusal of registration. ix. Cancelled Automatically applied when a registrant chooses to cancel their registration, regardless of their initial Status. The cancellation process is performed through the Edit Page by the registrant. ***Note**: Cancellation of registration does not imply the cancellation of products, which can only be done by the organizer.* Additionally, participants with the Status of Unconfirmed, Refused, or Cancelled are unable to access the Edit Page for editing submitted fields, even when providing a valid 5-digit OTP (one-time code). The following message will appear: **«You do not have enough permissions to perform this action.»** Furthermore, if the **Status** of a registration **changes** and an automated email is set up for the specific Participant Type with "**Event Approved**" and "**Automated**" set to "Yes," the system will **trigger** the **email** to be sent to the participant upon the completion of the Status change.

And the information:

General Information

Id	Identification Number
Created by	Who was it created by?
Created at	When was it created?
Updated by	By whom was the registration modified?
Updated at	When was the registration modified?

Extra Information

Confirmation url	Unique Participant Email Confirmation Link with a Suffix: **https://something.gathernext.com/confirm/**confirmationurl	Upon the Participant's click on this link, their Status is promptly updated from Unconfirmed to Pending. Following this action, they gain access to the Edit Page (Edit

		Submitted Fields Form), enabling them to make modifications. Without clicking the link, access is restricted. If the registration has acquired a product and the Status has been updated to Approved, the participant can access and connect to the Edit Page (Form for editing submitted fields) without the need for the specific link.
Edit url	The link that redirects the Participant to the Edit Form/Page (Form for editing submitted fields) with a prefix: **https://something.gathernext.com/authenticate_participant/**editurl To access the Edit page, registrants must have a Status other than (Unconfirmed, Refused, Cancelled).	Upon clicking the specified link, the participant is directed to a page where they need to verify their identity. A 5-digit one-time code (OTP) is automatically sent to their email. Upon entering and confirming this code within 10 minutes, they gain access to the Edit Page (Form for editing submitted fields).
Scan url	Scan link's unique ending	
QR Code	Unique QR code (quick response code)	This is utilized for scanning via a mobile, tablet, or laptop camera.

Additional information:

Scan	Recording daily scans, including the time of scan and the user who performed it. Only one scan per day is permitted.	It is possible to delete Scan in case of error.
Transmitted Mails	Systematic tracking of sent or unsent emails.	It displays whether the application has instructed the email provider to send the email, whether the email was sent successfully, if the sending failed, or if it's currently in a pending/waiting state. • Successful • Pending • Failed
Booked Products	Monitoring of the acquired Products of the participant.	It shows us which Products have been acquired and when. By pressing the **details** button on one of the products, we are taken to the Payment **Details** page, which deals with details for the payment of the specific product.

<u>Payment Details</u>

This page allows us to access and view the details of the product acquisition, specifically related to the payment.

Three buttons are displayed at the top:

Edit Participant	Payment List	Edit Payment

Edit Participant	This button directs us to the editing and management page of the participant who has acquired the particular product.	
Payment List	This button leads to the list of all payments, including zero payments, associated with the acquisition of products by participants. **Product→ Payments**	
Edit Payment	This button guides us to the payment details section if we wish to input additional information about the buyer or make corrections to existing information.	This pertains to data that may be necessary for the organizer to issue a receipt or invoice at the conclusion of the event.

In the center, there's the **Cancel Payment** button, which allows the organizer to cancel a payment and subsequently cancel the product registration. It's important to note that refunds or reimbursements are not automatically processed by the system; these actions are the responsibility of the organizer.

Upon canceling the payment for a product, that product is automatically made available for acquisition by other registered participants.

Towards the bottom of the **Edit Participant** page, organizers, particularly those with roles like ROLE_ORGANIZER and ROLE_TABLET_SCANNER, have the ability to add internal comments or notes labeled as «Comments» for the respective records.

Participant → List (Edit)

Tutorial video (Participant - List - Bulk (Scan - Print - Status - Type - Mail)

This feature is applicable to the basic participant management list. Within this list, you can perform various actions such as filtering fields, scanning participants, printing group or individual badges, sending group emails, and more.

Located just below the horizontal menu, there are buttons on a blue background, including:

Scan	Print	Status	Type	Mail

All five of these buttons are related to mass management of registered participants on the list. To execute a desired action, at least one record must be selected from the list. Selection is done by left-clicking the checkboxes in the first column, and then by pressing one of the five buttons, you can perform the desired action.

In detail:

Scan	This pertains to the scanning of at least one registrant by the administrator without using a camera. Instead, the scanning is initiated by pressing a button through the Participant List.	To successfully complete the scan, two conditions must be met: i. The Status of the registrant must be Approved. ii. The registrant hasn't been scanned on the same date. For example, if you attempt to scan 10 records simultaneously but only 6 of them have the Status Approved, then only those 6 will be scanned successfully. Similarly, if you try to scan 5 records with the Status Approved simultaneously, but 3 of them have already been scanned on the same date, only 2 of them will be scanned successfully.
Print	This refers to the printing of the badge for at least one registration directly from the administration interface using the Participant List.	For a successful printing operation, the following conditions must simultaneously apply: i. The selected entries (participants) must belong to the same Participant Type category. ii. There must be a designed and active badge for the specific Participant Type in the Badge tab. iii. A printer must be connected. The badge printing process is conducted through a web browser and involves the following: i. Browser usage: Chrome or Firefox. ii. The process must be carried out on a personal computer (PC) such as a desktop or laptop. iii. Each computer must be connected to a printer. A wired connection may offer better performance than a wireless connection. iv. It is advisable to perform a few test prints before the event to ensure that the appropriate settings have been configured on the computer, browser, and printer.
Status	It refers to changing the Status of at least one record from the administrative part of the Participant List.	If the Status of at least one registrant changes, and for the specific Participant Type (which can be more than one), there is an automated email configured with "Event Approved" and "Automated" settings set to "Yes," then as soon as the Status change is finalized, the system will trigger the sending of the corresponding emails to each participant registration, based on their Participant Type. However, if a registrant has been selected for a Status change and is already in the desired final Status, no change will be made for that record,

		and the automated email mechanism will not be activated. It's important to note that the Status change is what activates the automated email mechanism.
Type	This refers to the process of changing the Participant Type for at least one registrant from the administrative section of the Participant List.	When a participant's Participant Type is changed, for example, from VIP to Speaker, the new registration form related to the Participant Type (Speaker) will retain the previously completed common fields from the registration form of the previous Participant Type (VIP). Consequently, if the participant is reverted to their original Participant Type (VIP), they will have all the information they previously submitted available in their form, as if no changes had occurred. Importantly, it's worth noting that changing the Participant Type does not trigger the automated email mechanism.
Mail	This pertains to the mass sending of emails to at least one participant registration from the administration, specifically through the Participant List. It's important to note that there is a maximum limit for sending bulk emails, which is set to 250 at a time. <u>This feature is not intended for sending mass emails of the Marketing-Newsletter type. Attempting to send a large number of emails in bulk could potentially risk the email server being flagged as malicious by the email providers of the recipients.</u>	When sending emails from the Participant List, it's important to note that emails are typically designed to be specific to a particular Participant Type. Each Participant Type has its own unique registration form with specific fields, although some fields may be common across all registration forms. If you send an email from the Participant List to different Participant Types, the content and attachments will be sent as intended. However, if your email includes information related to fields that are not common to all registration forms, then those specific fields will not appear in the emails for Participant Types that do not have those fields. For example, if the email includes a phrase like "Dear [name] [lastname]" and "lastname" is not a common field, then only the phrase "Dear Sofia..." will appear if the "name" of the particular record (participant) is Sofia.

Directly below these buttons, you'll find the buttons for list management.

Show	This pertains to the selection of the number of records you wish to have displayed in the list. You have the options to choose from 10, 20, 50, 100, 200, or 500 records to appear on the list.
Column visibility	This refers to the customization of the columns displayed in the list table when managing the list. You can choose which columns to show or hide based on your preferences.
CSV	You have the option to download all the rows displayed on your screen, including all columns, in CSV format. This includes columns that you may have hidden in the list view.
Excel	You have the option to download all the rows displayed on your screen, along with all columns, in XLSX format. This includes columns that you may have hidden in the list view.

*These are general settings that pertain to how lists are displayed.

Just below the list, you will find the following fields:

<u>Permanently</u>

Id	Status	Type	Trans. Mails	Scan Dates	Reg. Date	Actions

<u>Not permanently</u>

The fields that we have created in the **Form** tab, with the "**Label to be displayed on list pages**" setting set to "**Yes**," will appear in the list in the order defined by their ranking in **Form→Forrm Field Position**. These fields will start appearing from the 2nd column in the list, following the column with the Id.

On the 2nd row of the table list, you have the option to filter the table by column using the **Search** field. This allows you to display only the rows that contain information matching the search term in the corresponding column.

In summary:

Id	A serial number is automatically generated by the system for each registrant after they complete their registration. This serial number serves as a unique identifier for each registration.	It is not accessible or viewable by the public or participants; it is strictly for internal administrative purposes.
Status	Each registrant is associated with a specific status, and the available statuses are as follows: i. Unconfirmed ii. Pending iii. Recheck iv. OnHold v. RePending vi. PreApproved vii. Approved viii. Refused ix. Cancelled The organizer or administrator has the authority to change the status of a registrant at any time through the administrative interface. It's important to note that certain statuses have automated actions associated with them.	i. Unconfirmed This is the initial status automatically generated upon registration after the form submission. ii. Pending This status is also generated automatically after the registrant confirms their email by clicking on the confirmation link sent in an email. It changes from Unconfirmed to Pending. iii. Recheck This is an automatic status change from PreApproved to ReCheck when a registrant with the PreApproved status makes changes to at least one field in their registration through the Edit Form/Page. iv. OnHold OnHold is a manual status chosen by the organizer to mark certain registrants as being on standby.

	Additionally, registrants with the following statuses: i. Unconfirmed ii. Refused iii. Cancelled Do not have access to the Edit Form or Page.	v. RePending RePending is an automatic status change from Approved to RePending when a registrant with the Approved status makes changes to at least one field in their registration through the Edit Form/Page. vi. PreApproved. PreApproved is a manual status chosen by the organizer to pre-approve certain participants. vii. Approved Approved is an automatic status assigned when a subscriber acquires a product. The participant's status before acquiring the product will be classified as Approved after acquisition. viii. Refused Refused is a manual status that the organizer can use to mark a registration as refused. ix. Cancelled Cancelled is an automatic status assigned when the registrant decides to cancel their registration, regardless of their current status. Cancellation is done through the Edit Form/Page, where the registrant can press the "Cancel Registration" button. If a registered participant has one of the following statuses: i. Unconfirmed ii. Refused iii. Cancelled And they attempt to access the Edit Page (Edit Submitted Fields Form), they will see the message "You do not have enough permissions to perform this action," even if they enter the 5-digit OTP one-time code.
Type	Filtering the list by Participant Type allows you to view and manage registrants based on their specific Participant Type category.	Clicking on "**Please Select**" allows you to access and choose from the list of Participant Types you have previously created in the **Participant Type** tab.
Trans. Mails	Filtering based on sent emails.	By clicking on "Please Select," the list of emails that have been created in the **Mail** tab will be displayed.
Scan Dates	Filter by scan date.	We select a calendar range.

Reg. Date	Filtering by date of registration.	We select a calendar range.
Actions	Edit participant registration.	By clicking the "**Edit**" button, we access the completed registration form of a participant.

Participant → Export→ Export participants

Tutorial video (Participant – Export – CSV -Excel)

This tab allows us to export all participant registrations with all fields (except files/images) filled in the registration form. The export is done to a CSV/Excel file with the order of the fields defined in

Form → Form Field Position.

Additionally, before downloading the list, we have the option to include the following information in the file:

i. Dates when the participants were scanned.
ii. Emails they received.
iii. Date of submission of the registration form.
iv. Registration method (online or onsite).
v. Consent for advertising (marketing), indicating if they have given positive or negative consent to the organizer.

Participant → Scan → Scan participants

Tutorial video (Participant - Scan - camera)

This tab allows **Users** (e.g., organizers and their team) to scan the QR code corresponding to each participant's registration. The scanning process is as follows:

i. The user selects the **Scan** option.
ii. The application requests access to the camera of the user's device (e.g., mobile phone, tablet, laptop).
iii. Once camera access is granted, the camera is activated.
iv. If a participant's QR code is detected, the following outcomes can occur:
    a. A success message appears if the participant's Status is Approved and it's the first scan within the same date.
    b. A failure message is displayed if the scan is repeated within the same date.
    c. A failure message appears if the participant's Status is different from Approved.
v. Regardless of the above, the data filled in by the participant, typically related to their identification, is displayed as Participant Details, including:
    a. ID
    b. Status
    c. Participant Type with a colored background as chosen.
    d. The values of the fields marked as "**Scanable**: **Yes**" and belonging to the specific Participant Type, e.g., First name, last name, ID number, etc., in the order defined in
    Form → Form Field Position.

Import

This tab allows the organizer to import a list of participants from a CSV file directly into the application, which is particularly useful when there is a pre-existing list of participants that need to be registered without the need for manual data entry.

Import participants

*Participant type	Participant Type selection.	When you select a Participant Type, a column titled "**Available Importable Form Fields for...**" appears, listing the names of the fields that have been created for that specific Participant Type. Please note that mandatory fields for participants must have a value in the CSV file and be included, while non-mandatory fields do not necessarily need to have a value.
*Status type	This setting pertains to the Status that you will assign to the registrants that you are about to enter.	After successfully entering the registrations, they will be assigned the specified Status.
*Delimiter type	This is the delimiter or separator that you can choose for the CSV file you intend to upload. It specifies how the data within the CSV file is separated or divided for proper parsing and import into the application. Common choices for delimiters include commas (,) and semicolons (;). The selection depends on how the data in your CSV file is formatted.	
*File	Allowed file: CSV	These are the allowed MIME types for file uploads. MIME types are identifiers for different types of files or data. In your case, the allowed MIME types for file uploads are: i. "text/plain": This typically represents plain text files. ii. "application/vnd.oasis.opendocument.spreadsheet": This MIME type is associated with OpenDocument spreadsheet files. iii. "application/octet-stream": This is a generic MIME type that can be used for binary data or any type of file. These MIME types specify the formats of files that can be uploaded or accepted by the application.

User ↓

User → New → New user

Tutorial video (User - List -New)

This tab allows the application's administrator/organizer to create additional users, granting access to individuals/partners within the organizer's group.

New user

*Username	Username: Must be filled out using Latin characters.	The Username will serve as the login credential for the User.
*Email	Ο λογαριασμός email του νέου χρήστη.	The User will receive an email from support@gathernext.com with the subject "**Registration System – Set new password**," as previously mentioned in the login process section. This email will contain instructions for setting a new password.
*First name	The name of the user.	This information is visible only within the application's administrative interface.
*Last name	The last name of the user.	This information is visible only within the application's administrative interface.
*Role	You can select one of the following roles for the new user: i. ROLE_MOBILE_SCANNER ii. ROLE_TABLET_SCANNER iii. ROLE_ORGANIZER	Detailed: i. **ROLE_MOBILE_SCANNER**: is specifically designed for individuals who need limited access within the application. This role is primarily focused on scanning and printing badges, especially through mobile devices. Users with this role do not have access to application data or settings, making it suitable for those who are responsible for on-site scanning and badge printing without needing access to broader application functionality. They can effectively use this role for mobile scanning and easily print badges from a desktop or laptop connected to a printer device when configured accordingly. ii. **ROLE_TABLET_SCANNER:** Users with this role can access the Participant List tab. They can perform actions such as scanning, printing, adding new registrations, and editing existing participant entries. However, they cannot perform bulk management tasks. iii. **ROLE_ORGANIZER**: This role provides full access to the application, including all data and settings. Organizers can manage all aspects of the event registration system. Choose the role that best suits the user's responsibilities and access needs.
*Active	The activation status of the user we've created determines their	Certainly, here's a refined version of the explanation:

	ability to access the application and its features.	- If "**Active**" is set to "**Yes**," the user is activated and can log in to the application. - If "**Active**" is set to "**No**," they do not have access and cannot log in. When you create a new user and set "**Active**" to "**Yes**, the system will automatically send an **email** with the subject "**Registration System – Set New Password**" to the user's email address. This email initiates the process of connecting to the application. If you initially set "**Active**" to "**No**," the email won't be sent. If you decide to activate a user who was initially set to "No," you can trigger the sending of the activation email by clicking the " **Reset Password** " button located under the horizontal menu.
Phone number	Enter mobile phone number.	
Landline number	Enter a landline phone number.	

User → List

This tab displays a list of the users (Users) we've created and provides a summary of the settings we've configured. Specifically, it shows:

Id	Username	Email	First Name	Last Name	Role	Active	Updated By	Updated at	Actions

To edit a user, simply select the user and click the **Edit** button in the Actions column.

Dashboard

Upon entering the application's administration, the initial page you will encounter is the Dashboard. This page provides an overview of statistical data and includes flow charts related to registrations and scanning. Access to the Dashboard is available to all users.

Here is a detailed breakdown of its components:

Registration statistics

The Registration Statistics section on the Dashboard provides several insights:

1. Registration Flow Charts: You can track the registration flow on a daily, monthly, and cumulative basis. This helps you understand how registrations are progressing over time.

2. Participant Distribution: View pie charts showing how participants are distributed by Status and Participant Type. This helps you see the breakdown of registrants based on their status and registration type.
3. Registration Source: A horizontal bar chart shows the source of registrations. "**Onsite**" refers to registrations made by the organizer, while "**Online**" represents registrations completed by participants themselves through the Public Form
4. Choice Fields: Vertical bar charts display the answers from choice fields. This allows you to analyze responses in various choice fields.

You can apply filters based on your desired calendar range, Participant Type, and Status. Additionally, you have the option to export and save these diagrams in formats such as PNG, JPEG, PDF, CSV, and XLS. This provides flexibility in sharing and using the statistical data.

Attendees statistics

The Attendees Statistics section on the Dashboard focuses on participants who have been Approved and have at least one scan. It provides insights into this specific group:

1. Participant Type Distribution: A pie chart (ATTENDEES PER TYPE) illustrates how participants are distributed based on their registration type (Participant Type).
2. Attendance Comparison: The horizontal bar chart (ATTENDANCE) compares the number of participants who are **Approved** (approved for attendance) with the number of participants who have been scanned, indicating their presence.
3. Attendance Source: A horizontal bar chart (REGISTRATION SOURCE for Attendees) shows the source of registrations for attendees. "**Onsite**" represents registrations made by the organizer, while "**Online**" includes registrations completed by participants themselves through the Public Form.
4. Choice Fields: Vertical bar charts display responses in choice fields by the attendees present. This helps you analyze their preferences and choices.

You can filter these statistics by the Participant Type you wish to observe. Additionally, you have the option to export and save these charts in various file formats (PNG, JPEG, PDF, CSV, and XLS) for further analysis and reporting.

Scan statistics

The Scan Statistics section on the Dashboard provides insights into the scanning process. Here's what you can do:

i. Scan Flow Chart: You can monitor the scan flow chart (SCAN FLOW) to see the daily or monthly scanning activity. This chart helps you understand when and how often participants are being scanned.

ii. Cumulative Scan Flow Chart: The additive scan flow chart (ADDITIVELY SCAN FLOW) shows the cumulative scanning activity over time. It provides an overview of the total scans.

You can filter these charts based on your preferred calendar range and the type of participation (Participant Type) you want to focus on. Additionally, you have the option to export and save these charts in various file formats (PNG, JPEG, PDF, CSV, and XLS) for further analysis and reporting.

Daily Scan statistics

The Daily Scan Statistics section on the Dashboard provides detailed insights into the scanning process for a specific date within a 24-hour period. Here's what you can do:

1. Scan Flow Chart: You can monitor the scan flow chart (SCAN FLOW) and the additive scan flow chart (ADDITIVELY SCAN FLOW) for a specific date, allowing you to see the scanning activity on that particular day.
2. Scan per Type (Participant Type): The pie chart (SCAN PER TYPE) displays how the scanned attendees are distributed according to their type of registration (Participant Type). This helps you understand the mix of participants present on that day.
3. Registration Source for Scanned Attendees: A horizontal bar chart shows the source of the registrations for attendees who were scanned. You can distinguish between registrations made by the organizer (**Onsite**) and registrations completed by participants themselves through the Public Form (**Online**).
4. Choice Fields: Vertical bar charts provide insights into the answers given in the choice fields (Choice Fields) by the attendees and scanned attendees, allowing you to analyze their preferences.

You have the flexibility to filter these charts based on the type of participation (Participant Type) you want to focus on and the specific date you select. Additionally, you can export and save these charts in various file formats (PNG, JPEG, PDF, CSV, and XLS) for further analysis and reporting.

UserName ↓

UserName → Profile (Edit)

In this section, users can access a page displaying their personal details and make edits or modifications to the information as needed.

UserName → Logout

By selecting the "Logout" option, the user can exit the application and disconnect. Additionally, there is an automatic logout feature triggered when the countdown timer, located at the top right of the screen, reaches zero.

Useful links

Tutorial videos

You can access the video tutorials here: GatherNext Video Tutorials.

Third-party services

Useful links for the third-party services integrated into GatherNext's web application:

1. **CKEditor**:
    - Official Website: CKEditor

- Documentation: CKEditor Features

2. **Stripe**:
   - Official Website: Stripe
   - Documentation: Stripe Documentation
3. **Google Tag Manager**:
   - Official Website: Google Tag Manager
   - Documentation: Google Tag Manager Documentation

These resources should provide you with the information needed to understand and use these services effectively.

Other Links

W3Schools (https://www.w3schools.com/) offers valuable resources to enhance your proficiency with CKEditor in the web application. It provides essential foundational knowledge, including HTML and CSS, to help you leverage CKEditor's full potential.

Avoid

We provide a list of common reserved SQL words to avoid in field names. It's essential to steer clear of these reserved words to prevent potential conflicts and issues in the database. Users should be aware of this list and choose field names carefully. You can access the list of common reserved SQL words here.

ABORT	DECIMAL	INTERVAL	PRESERVE
ALL	DECODE	INTO	PRIMARY
ALLOCATE	DEFAULT	LEADING	RESET
ANALYSE	DESC	LEFT	REUSE
ANALYZE	DISTINCT	LIKE	RIGHT
AND	DISTRIBUTE	LIMIT	ROWS
ANY	DO	LOAD	SELECT
AS	ELSE	LOCAL	SESSION_USER
ASC	END	LOCK	SETOF
BETWEEN	EXCEPT	MINUS	SHOW
BINARY	EXCLUDE	MOVE	SOME
BIT	EXISTS	NATURAL	TABLE
BOTH	EXPLAIN	NCHAR	THEN
CASE	EXPRESS	NEW	TIES
CAST	EXTEND	NOT	TIME
CHAR	EXTERNAL	NOTNULL	TIMESTAMP
CHARACTER	EXTRACT	NULL	TO
CHECK	FALSE	NULLS	TRAILING
CLUSTER	FIRST	NUMERIC	TRANSACTION
COALESCE	FLOAT	NVL	TRIGGER

COLLATE	FOLLOWING	NVL2	TRIM
COLLATION	FOR	OFF	TRUE
COLUMN	FOREIGN	OFFSET	UNBOUNDED
CONSTRAINT	FROM	OLD	UNION
COPY	FULL	ON	UNIQUE
CROSS	FUNCTION	ONLINE	USER
CURRENT	GENSTATS	ONLY	USING
CURRENT_CATALOG	GLOBAL	OR	VACUUM
CURRENT_DATE	GROUP	ORDER	VARCHAR
CURRENT_DB	HAVING	OTHERS	VERBOSE
CURRENT_SCHEMA	IDENTIFIER_CASE	OUT	VERSION
CURRENT_SID	ILIKE	OUTER	VIEW
CURRENT_TIME	IN	OVER	WHEN
CURRENT_TIMESTAMP	INDEX	OVERLAPS	WHERE
CURRENT_USER	INITIALLY	PARTITION	WITH
CURRENT_USERID	INNER	POSITION	WRITE
CURRENT_USEROID	INOUT	PRECEDING	RESET
DEALLOCATE	INTERSECT	PRECISION	REUSE