yve event tool

FAQs

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1 Getting started with yve

2 Event Setup: Registration & Settings

How can I create a new event?
You can create a new event:

- By clicking Events-> New and selecting a template
- By clicking on 'Copy event' in an existing event

Which URL has the public registration?
The public registration URL can be found at:
Event-> Websites-> Public Registration -> URL

How can I limit the maximum number of participants?
The maximum number of participants you can limit with:
Event-> Edit Registration-> maximum number

What does the participant see when an event has reached the maximum number of participants?
The participant can no longer register, but receives a message that the event is fully booked when he submits the questionnaire.

Can I restore a deleted event?
A deleted event cannot be restored.

Why do some participants get to the login page after public registration?
If a participant already exists as a contact, yve recognizes the participant and asks him to log in for security reasons.
If the participant does not know his login data, he can send his login link with the button 'Send login link'.

Why do I get an error message when I click on the public registration preview?
You must enable public registration, otherwise the error message 'Page not found' appears:
‚Event-> Edit Registry-> Public Registry.

I can no longer see the reply button on the website - why is that?
If you uncheck 'Event->Edit registration->Participants can change answer later', the questionnaire can only be completed once, after which the answer button is hidden.

How can I set events to 'Done'?
You can set the status 'Done' at 'Event->Edit Event->Status'.

Is it possible to access the questionnaire directly via the button in the email without first going to the event page?
You can skip the event website. To do so, select 'Survey is displayed first' under 'Event->Edit Registration->Starting page registration'.

How can I set the maximum number of accompanying persons for a participant?
You can set a custom maximum number of companions under 'Event->Participants'->Action->Change Response'. You can also import these values by adding a 'companions_max' column with the respective values. The import must be done via 'Event->Participants->Assign Participants->Import List', as this value is event-specific.

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3 Event-websites: create & design

How can I add, change or delete a tab?
You can change the name of the tabs with Event -> Websites -> Tab.
You can add and change tabs by filling the tab with content below:
‚ Event-> Websites->Webpages edit ->Event website-> <name of tab> '.
You can delete tabs by deleting the contents of the tab.

How can I insert a document as a file into the website?
You can insert a document into the web page by highlighting the word editor and uploading the document with 'insert link'.

How can I use a Google Map?
You can display up to 5 locations (pins) on a Google Map. Enter these places with the real address: Websites-> Google Maps -> Pin.
You then place the Google Map in the editor with the merge tag 'Google Map'.

How to edit the login page?
You can change the login page under: Account-> Login Site EN

Is it possible to embed videos on the websites?
Videos can only be displayed as YouTube videos on the event website. Embedding your own videos via iframes is not possible.

Can I change the date format for the merge tag 'Event Start Date'?
If you use the merge tag for the date, you can't change the format. However, you can delete the merge tag and enter the desired date as text instead.

Is it possible to display custom fonts on the website?
Custom fonts are available for the website via ‘Account->Custom Fonts’.

Wie kann ich einen Link einfügen?
Enter the link name into the editor and highlight it with the cursor. Then click 'Link' and enter the URL.

Is it possible to make the buttons on the website and in emails larger?
The button automatically adjusts to the font size. You can change the default font size under 'Background & Colors'.

How can I create an imprint?
The merge tag 'Event Imprint': places the event imprint, possibly with a link, at this location. The content can be entered under 'Event->Imprint & Privacy Policy'

How can I adjust the background color in a table?
You can customize the background color of a table by right-clicking inside the table and then entering the color in 'Cell->Cell Properties->Advanced->Background Color'.

My table has a large white gap - how do I get rid of it?
If your table has fixed heights, spacing will occur. Please delete all heights under 'Table Properties', 'Row Properties', and for all cells in 'Cell Properties'.

How can I copy the contents of the editor?
You can copy the contents of the editor by copying the source code. To do this, click the '<>' symbol in the editor, copy everything using CTRL A and CTRL C, go to the print template, and paste the source code using '<>' and CTRL V.

4 Design Survey/Registration Form

Is it possible to change the questionnaire in between?
You can edit the questionnaire at any time. Caution: If you change the text of a question, the old text will not be saved. Instead, it will be changed for all participants, even those who have already responded. If you want to keep the old text, you should create a new question and set the old one to invisible.

How can I create a yes / no question?
A yes - no question is a radio button question with the selection 'yes' and 'no' and the orientation 'radio button horizontal'.

How can I change the text of the declaration of consent?
The declaration of consent can be changed under 'Event-> Websites-> Terms'.

I don't see any confirmations, although the participants have replied, why is that?
The confirmations are not displayed if you have deleted the question about the participation in the questionnaire.All functions related to participation will be switched off when you delete the question about participation.
You can add the question about participation in the questionnaire editor on the right under the heading 'Add questions' by clicking on 'Participation'.

I only see acceptances and rejections, but the other questions in the questionnaire are not answered - why is that?
If you use one of the 'Button direct' instead of the 'Button email left' or 'Button email center' in the email, the questionnaire will be skipped and only participation will be requested.

How can I add multiple choice to the questionnaire in yve?
Yve does not have a multiple selection, you can set checkbox questions per option.

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5 Emails: Sender, Design, Campaign & Logs

How can I send a document by email?
You can send document by:

- Attach an attachment in yve. The content can be edited in Event-> Emails-> Attachments and these attachments can be selected in any Email Template
- You can insert a link to the document in the email by highlighting the text in the editor, then clicking 'Insert Link', uploading and selecting the document.

How can I view an overview of the bounces?
In the 'Event-> Reports-> Detail Report' there is an 'Email Status' column where you can see the bounces. This column is also included in the contact details report under 'Contacts'. Under Contacts you can also set a filter with 'Undeliverable'.

How can I unblock an email address?
Emails are blocked if they are undeliverable in order to maintain yve's email reputation.
If you believe that the reason for this has been fixed, you can unblock the email in the contact details of the participant with 'unblock email'.

Can I immediately display images in emails?
yve sends pictures in emails as links. Some email clients block these links and you can not see the pictures until you click on a button. Whether these links are displayed immediately is a security setting for the email recipient - unfortunately, this can not be set on the sender side.

How can I see if an email has been sent?
You can see the scrapped emails with:

- Dasboard-> Emails
- Emails-> Email History-> Date

How can I send the login data to a participant?
You can send the data with the Merge Tag 'Login Event' or simply send the sign up button with the merge tag 'Button Response'.

The graphics in the mail are very pixelated, what can that be?
yve creates from each picture a version that fits the width - with email it is 660px. If this image is too pixelated, you can choose an image that has a width of 660px in the original (or 840px for the webpage).

Is it possible to display the opening rate of emails?
It is not possible to display opening rates of emails.

We decided against it because this would require tracking images to be set in the emails. Some spam filters rate this as spam. Also, such a technique would only report the emails open when the owner downloaded the images - which is not really the opening rate.

How can I change the text of the default unsubscribe link?
To change the text of the standard unsubscribe link, you can set the merge tag 'Contact unsubscribe' yourself, then yve will no longer place the link.
You can then change the text for the link under 'Event->Emails->Button Text & Color->Unsubscribe'.
You can then change the text for the confirmation page under 'Event->Websites->Unsubscribe'.

How can I change the forwarding for the sender?
The forwarding for your yve-tool.de sender address can only be changed for you by yve Support.

Is it possible to send an email to only those contacts who did not answer the questionnaire?
You can create an email and select 'No Response' as the recipient. yve will then select all participants who did not answer the question about their participation as email recipients.

Is it possible to preview emails?
You will see a preview after 'Create email campaign' and can click 'Test' for each email, then a test email will be sent to you.

How can I verify a participant before they receive final confirmation?
To do this, remove the ticket from the confirmation email and reword it so that verification is still pending. Once a participant has been verified, set the status to "Verified" under "Event->Participants->Verification Pending." This will trigger the verification email, which should contain the confirmation and, if applicable, the ticket.

How can I create an additional event workflow email?
The number of workflow emails is limited to 5. You can use inactive or unused workflow templates. You can change the template title under 'Event->Emails->Email Type Names'.

How can I resend the confirmation email to a participant?
If the participant has confirmed, the confirmation email can be sent again with 'Event->Participant->(Name)->Action->Send confirmation email'.

How can I create a participant's ticket as an admin?
You can copy the ticket into one of the print templates (disable the print head) and then create a form letter for the participant.

6 Printing & dokuments: badges, mail merge & individual letters

How can I remove the print address?
You can remove the print address under, Print-> Print Address -> Print Address'.

How can I change the salutation in the letter?
You can change the salutation in the letter under, Event -> Websites -> Salutation '. This salutation (merge day, greetings') is the same for website, emails and printing. The salutation in the address in the letterhead is fixed.

We will be sending the invitations in paper form. Is it possible to generate a QR code?
You can create a mail merge and place the merge tag 'QR Code' in the editor. yve will then place the individual QR code for this participant's registration in this location.

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7 Contacts & participants: fields, import, label, assignment

How can I create categories or group names for multiple participants?
Categories or group names correspond to yve identifiers. You can create a new identifier under 'Contacts-> Identifiers' and assign them as 'label' in the import.

How can I differentiate between core team, VIPs, coaches and participants?
You can assign identifiers during the import by:

- Create the identifier under Contacts-Label-New
- In Excel, import the column 'label' with the identifier

How can I change several labels at the same time?
If you carry out an import with the behavior 'Insert new and change existing', you can use the check mark 'Existing labels will be overwritten' to overwrite the existing labels of a contact with the labels in the Excel list.

How can I delete several contacts at the same time?
You can delete contacts at the same time by dragging an entire contact report (Contacts -> Detail Report) and then deleting in Excel all you no longer need (you can also delete all your contacts).
Then import this Excel with the behavior 'Insert, Update and Delete'. After a confirmation email, all removed contacts will be deleted.

Why do I get the error message when importing 'familyname is invalid'?
The error message 'familyname is invalid' may have the following causes:

- There must be a value in the familyname column
- A familyname has to start with a letter
- The column name must be in the first line, i. Tiitel lines must be deleted in Excel
- The list must be in Excel in the first tab, i. it is best to delete all other tabs

Only when all errors have been fixed will the liste be imported.

Why do I get the error message 'unknown identifier' during import?
In the 'label' column, only label may be used that were previously created under 'Contacts -> Labels-> New'.

Why do I get the error message 'The combination of familyname, firstname and email already exists' on import?
yve prevents duplication, so the combination of familyname, firstname and eimal must be unique.
The error message will be displayed if duplicates are included in your list.

Why do I get the error message 'xxx occurs multiple times' when importing?
When importing, the yve_id, customer_number or the combination of 'familyname + firstname + email' may only appear once in your Excel list. Please remove all duplicates.

How can I change a participant's password?
You can change the password of a contact with: Contacts-> <name> -> password

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Does the number of contacts from my license apply per event or across all events?
The maximum number of contacts from your license applies to all events account-wide.

Can I restore a deleted contact?
Contacts or participants cannot be restored once they have been deleted.

We have received registrations from people who, in our opinion, are not even invited - why is that?
If you have a public registration, anyone who receives the link can register, and a new participant will be created for them.
This isn't possible with a closed registration (importing a list and sending invitations). If the individual registration link is forwarded, no new participant is created; instead, access is granted to the existing participant. You can tell this because the participant's login name is still the same as the old one. If the name in the questionnaire is editable, anyone who receives the forwarded invitation can overwrite the

name. Therefore, you shouldn't make the participant's name editable in the questionnaire.

Is it possible for participants to register without creating a Yve contact with a login?
A participant is always first a contact in yve.

What do I have to write in my Excel list if I don't have any names for the email?
The 'familyname' field is required, meaning you must enter a value there. If you don't have a name, you can use a placeholder, e.g., '(Please fill in)' or the email address. You can then add the last name as a field in the questionnaire, and participants can overwrite the value. Important: The last name is used in the salutation, so you should no longer use the 'yve_greetings' merge tag. Instead, use a fixed text such as 'Dear Sir or Madam,'.

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8 Data security (GDPR): legality, consent, processes

9 Preview & end-to-end-tests before go-live

10 Evaluate participant-reports & create exports

How can I view the self-created report?
You can seea self-created report by clicking on: Event-> Reports-> Name of the report

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How can I see if participants have been checked in and out multiple times?
The check-inshort report and detailed report ('Event-> Reports-> check-in') contain a log entry for each check-in process. You can check a participant in and out several times, he will then receive a log entry with a time stamp for each time.

Where do I see participant numbers in the report?
You see the answers of the participants under the column 'Response'.

How can I see the fields of the companions?
You can see the companion fields under:

- Detail Report: Columns 'companions' and 'companion1 familyname', ...
- Self-defined report: Fields 'Companion Number' and 'Companion Name' fields

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11 Prepare and execute check in on site

Where can I find the admin QR code?
The Admin QR Code can be found at: Event -> Check In-> Admin QR Code

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Is there an app for check in?
For chek in, you'll need a QR code scanner app. You can use any QR scanner that recognizes and automatically opens a URL. We recommend 'QR Scanner - Fast Scan' by Sabrina Holzer for iPhone and 'QR Scanner' by QR Scan Team for Android.

How to check in companions one by one?
To be able to check in escorts individually, please remove the checkmark: Edit registration -> Instant checkin ticket scan

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How can I add a comment for checkin?
You can add an entry for each participant at: Participants -> Action -> Check In-> Comment for Check in. The comment will be displayed when scanning the ticket.

How can I block a ticket?
You can lock a ticket in which you either:

- Regenerate the token under Contact -> (Name) -> Regenerate Token
- Delete the invitation
- Delete the contact

How to check in a participant who has not accepted or is not in the system at all?
Not accepted -> check the box next to 'Allow chekc in for participant that have not accepted'.
Not available -> you create the contact as admin and assign it to the event.

How can I check in and check out a participant multiple times with the same ticket?
You can scan a ticket and then check out afterwards multiple times. Every check-in process is documented with a log entry in the check-in report.

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12 User management: roles, groups, notifications, SSO

How can I reset my password?
You can click on 'forgot password' when logging in.

I can no longer log in. How can I unlock my blocked login access to my account?
The account will automatically unlock after 10 minutes. You can also have an unlock link called 'Unlock login'.

How can I turn off the notifications?
You can set the notifications under: User-> (Name) -> Edit-> Event Calendar Entries / Emails for Tasks / Emails for Limits

How can I get access to the yve tool for a new colleague?
You can create new users and ‘User->New’.

13 Manage your account and settings

How can I display an order number or project name on the invoice?
If you need an order number or project description on the invoice, you can enter it under 'Account->Billing Address->Order Number'.

How can I change the login page?
You can change the text of the login page under ‘Account->Login Page->DE’.

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14 System integration & API: interface & functions