When an Advancement employee wishes to Import a spreadsheet of Event Attendees into CADENCE after the event has occurred.

Retrieve template file ‘Event Attendee Import Template.xlsx’, Link can be found in the documentation library.

1. Make sure the Event is already created in CADENCE.
2. Make sure there is a Registration Option, ticket type, in your event.
   1. This is the event under Options-> Registration Options -> Registration Type
3. Fill out Spreadsheet using guidelines below.
   1. Do not change the name of any column headings
   2. Do not add column headings
      1. If another column is needed Create an Advancement IT Help Desk Ticket.
   3. Use table on the next page for Column Data needs.
      1. Columns that are not required can be left Blank if not needed by submitter
   4. The quantity column needs to be the number of tickets/registration options needed for the number of people attending the event with that registration option.
      1. If one person is attending with 1 guest, for a ‘Single’ ticket option the count would be 2. For a ‘couple’ ticket option the count would be 1.
      2. The system assumes that if you have a quantity above 0 but the registrant is not attending then all of the tickets are for guests that are attending in their place.
   5. If a Guest Lookup ID is not entered, the guest will be set up as an un-named guest, if you want the guest record linked to a constituent the ID must be provided in spreadsheet, This includes if the Spouse is attending with the Registrant.
      1. If a quantity of 3 is entered with no guest information the Registrant will be registered with 2 Unnamed guests.
      2. If a quantity of 3 is entered with 3 guest IDs listed, the Registrant will be marked as ‘Will Not Attend’ but will still be the host of the guests.
   6. If Walk-in Registration is chosen, the attendee and all guests will default to registered and attended, no matter what else is in the file.
   7. If Preregistration is chosen, status and registered can be modified
      1. If Registrant is 'Registered (will not attend)' or 'Canceled', the registrant attendance will be marked as no show, but the guests will get marked with whichever option you chose for them.
4. Verify all data in spreadsheet
   1. Registrants and guests that are deceased cannot be imported into the event through batch.
5. Users should submit their uploads through an Create an Advancement IT Help Desk Ticket and continue to direct issues related to queries, reports, new data fields, and access roles to their Data Steward.
6. Event Registrants are imported, and exceptions returned to Submitter.
7. File exceptions are handled Manually by Submitter.

**NOTE:** Do not enter a Guest as a registrant, for example if John Smith attends with Jane Smith as a guest, do not put Jane Smith in as a registrant on her own, leave her as a guest of John Smith. The event will show up on Jane’s record, but if you enter her as a registrant and a quest she will error out.

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| **Column Name** |  |
| Event lookup ID | Required |
| Event | Not Required |
| Registrant | Lookup ID of Registrant |
| Registration type | Required, options are 'Walk-in registration' or 'Preregistration' |
| Date |  |
| Status | Required, options are 'Registered ', 'Registered (will not attend)' or 'Canceled' |
| Registration option | Required, whatever 'ticket' options you set up are available |
| Quantity | # of tickets of the registrant option needed for the number of people attending |
| Guests Guest 1 | Guest Lookup ID, required for 'named' guests such as spouses |
| Guests Attended 1 | Attended, only options are 'Yes' and Blank |
| Guests Guest 2 | Same as Above |
| Guests Attended 2 |  |
| Guests Guest 3 |  |
| Guests Attended 3 |  |
| Guests Guest 4 |  |
| Guests Attended 4 |  |
| Waive benefits | Not required, Defaults to 'False' in batch |
| Attended | Required options for registrant are 'Yes' and 'No show' |