

# yve event tool

## User manual

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## Content

### 1 Getting started

- 1.1 Introduction to yve
  - 1.2 First steps in yve
- 

### 2 Event setup

- 2.1 Create an event
  - 2.2 Event Navigation
  - 2.3 Event Dashboard
  - 2.4 Registration setup
  - 2.5 Companions
  - 2.6 Waitlist
  - 2.7 Registration types
  - 2.8 To Dos Checklist
  - 2.9 Event Setup Tips
- 

### 3 Edit event website

- 3.1 Event websites in yve
  - 3.2 Customize the design
  - 3.3 HTML Editor
  - 3.4 Merge Tags
  - 3.5 Greetings
  - 3.6 Language
  - 3.7 Videos, Maps & Analytics
  - 3.8 Cookie Banner
  - 3.9 Event community
  - 3.10 Websites Tips
- 

### 4 Setup survey

- 4.1 Survey editor
  - 4.2 Add questions
  - 4.3 Edit questions
  - 4.4 Conditional questions
  - 4.5 Answer questions
  - 4.6 Survey tips
- 

### 5 Edit and send emails

- 5.1 Emails in yve
  - 5.2 Legal requirements
  - 5.3 Set email sender
  - 5.4 Edit email design
  - 5.5 Merge Tags
  - 5.6 Email templates
  - 5.7 Emails and language
  - 5.8 Spam Filter
  - 5.9 Email bounces
  - 5.10 Create email campaign
  - 5.11 Email log
  - 5.12 Email tips
- 

### 6 Setup printing

- 6.1 Create letters
- 6.2 Name tags

## 6.3 Create printing

---

### **7 Import contacts**

- 7.1 Contact data
  - 7.2 Contact Fields
  - 7.3 Import contacts
  - 7.4 Identification and validation
  - 7.5 Create labels
  - 7.6 Assign contacts to an event
  - 7.7 Automatic deletion
  - 7.8 Contacts tips
- 

### **8 Data protection (GDPR)**

- 8.1 Checklist for the GDPR
  - 8.2 Privacy statement
  - 8.3 Data processing agreement
  - 8.4 Lawfulness of processing
  - 8.5 Declaration of consent
  - 8.6 Data protection processes
- 

### **9 Testing**

- 9.1 Preview event website
  - 9.2 End-to-End Test
  - 9.3 Testing tips
- 

### **10 Participant reports**

- 10.1 Create reports about participants
  - 10.2 Evaluation of the reports
- 

### **11 Manage check in**

- 11.1 Preparation for the check in
  - 11.2 Check in participants
  - 11.3 Check in tips
- 

### **12 Manage users**

- 12.1 Users and contacts
  - 12.2 Nutzer Rollen
  - 12.3 Notifications
  - 12.4 Groups of users
  - 12.5 Single Sign On
- 

### **13 Manage account**

- 13.1 Account settings
  - 13.2 Deleting an account
- 

### **14 System integration (API)**

- 14.1 API Interface
  - 14.2 API functions
-

# 1 Getting started

## 1.1 Introduction to yve

### What is yve?

Yve is a tool for managing events and participants. With yve, you can create a web page for an event that allows participants to register and log in. Optionally, you can also manage tasks, budgets, and schedules for events.

### Requirements for yve

To use yve, you need to have your own yve account. Just contact us at [support@yve-tool.de](mailto:support@yve-tool.de) to get a free trial account. You just need a browser with internet access. Yve can be used from the PC, tablet or even on the smartphone, no software or app has to be installed.

### Sign in to your account

You can access your account via 'Login' on the [www.yve-tool.de](http://www.yve-tool.de) website. Simply enter your account name, then you will be redirected to the login page of your account. Alternatively, you can go directly to where you enter [xxx.yve-tool.de](http://xxx.yve-tool.de), where xxx must be replaced by your account name.

## 1.2 First steps in yve

### Overview Navigation through functions

On the Navigatons bar you can go directly to the most important functions:

- **Events** you have created and for which you want to manage participants
- **Contacts** that belong to your event. These are participants, but also suppliers or venues
- **User manual** explained all yve features
- **EN/DE** switches between languages
- **Account** allows you to set basic settings such as language and text templates
- **Users** are all users of your account who manage the event and participants
- **Logout** logs you out.

### Create new event

You can create a new event by clicking on 'Events-> New'. Enter the name and start / end date of the event, all other fields are optional and can be filled later. With 'Ok', the event is created and you are automatically directed to the detail view of this event.

### Create new contact

You can create a new contact via 'Contacts-> New'. Yve knows over 50 attributes that can have a contact, but you only need to specify the family name, all other fields are optional. For participants, you would usually need first name, surname, and email.

### Tips for the perfect event

All articles have a 'Tips' section in the Best Practices for each topic area. These tips go beyond the use of yve and will help you manage events better.

## 2 Event setup

### 2.1 Create an event

#### Create Event

To start a registration, you must first create an event: 'Events -> New'. Select an event template from which the texts for the website and emails should be copied. Then enter the title and the start and end date. Under the status, you define the internal planning state of the event (optional, definitive, done, ...). This status is used to calculate the number of active events for your subscription and determines whether the event is displayed under 'Events'.

You will then be taken automatically to the dashboard of the event. The title of the event is only visible internally and not for participants. Further settings for the event are optional for a registration.

#### Copy event and create templates

With 'Event Dashboard -> Clone' you can clone a complete event with all texts, questions and pictures or create a template. These templates can be edited by administrators under 'Events -> Templates'. With 'Events -> Templates -> Copy Default' you can copy our standard template into your account.

### 2.2 Event Navigation

#### Event navigation

In the event details view you can see all areas of your event:

- **Event Dashboard:** all important numbers and settings for your event.
- **Websites:** Overview of all websites, here you can customize the design and content
- **Emails:** Develop email templates and send emails to participants.
- **Prints:** Create letters or name plates.
- **Participants:** Participants status
- **Reports:** Create reports for participants.
- **Check in:** Manage the check in on site

Optionally, the event contacts (suppliers, location, ...) can be created and the agenda, tasks and the event budget managed. To do this, select 'All fields' under 'Account -> Default view'. You can go to the event detail view at any time by clicking on the title of the event at 'Events'.

### 2.3 Event Dashboard

#### Event Dashboard

In the event dashboard you can see the most important settings for your event:

- **Basic data:** event title, date, event status, participant status and registration deadline.
- **Accepted:** There is a timeline for the confirmed participants, start, end and intervals are set automatically.
- **Emails:** For the same period of time, all actively sent emails will also be displayed (automated emails, such as confirmation emails are not included).
- **To Dos:** Finally, you will see the overview of all activities that need to be done for the event setup in the To Do Checklist.

### 2.4 Registration setup

#### Set the registration status

The most important settings of a registration can be made under 'Event Dashboard -> Registration'. A registration has its own title, which is also visible to participants. This title can be the same as for the event, or have its own name.

The status of a registration determines whether participant can register:

- **Design:** the event website is not visible and participants can not login or register. Use this status when designing the event website.
- **Open:** Participants may register
- **Info:** Participants can see the event website for information, but do not register. All login buttons are not displayed.
- **Check in:** Participants can see the event website for information, but do not register. All login buttons are not displayed. The check in can be carried out (see check in)
- **Closed:** the event web page is not visible, but a text is displayed instead, which can be customized under 'Event Dashboard -> Websites -> Closed page'

If you have the checkbox set to '**Modify the answer later**', a participant can change his answer to the questionnaire after answering it. Uncheck if you do not want to allow any changes after the first response. This is e.g. If you want a binding commitment from the participant and do not want to allow cancellations. In the event website, the sign-up button will no longer be displayed. If you display the questionnaire first, an error message will be displayed.

## Limits

The maximum number of participants determines how many participants are accepted. You will receive a warning email as soon as this number is reached. After this, participants can no longer sign in, but receive a message that the event is fully booked. You will receive a warning e-mail with the contact data for each participant, who wants to register after the limit has been reached, so that you can take action.

A participant who is already registered may send updates as long as the number of participants does not increase.

If a participant cancels and the number of participants is again under the limit, registration is possible again.

## Deadline

You can set a registration **deadline** for the registration with 'Event Dashboard -> Registration -> Registration deadline'. The registration is then allowed for this date until 23:59.

If the registration deadline has passed, a participant who is already registered may only cancel, all other updates will be prevented.

## Community

Each event can have its own event community (see create communities) in which participants can exchange information. You can determine whether participants will automatically enter the community or have to agree to it (Opt in).

## 2.5 Companions

### Companions

Companions are additional persons who can be assigned to a participant. A companion is not created as a contact, but only available for an event as additional information for a participant.

The maximum number of accompanying persons determines how many accompanying persons they want to allow at most. You can define an individual maximum number of companions under 'Event-> Participants' -> Action-> Change Response'. You can also import these values if you add a column 'companions\_max' with the respective values. The import has to be done via 'Event-> Participants-> Assign Participant-> Import List' because this value event is specific.

As soon as the value for max. If the number of companions is greater than zero, the number of companions is queried on the question of participation.

You can determine whether the names of the accompanying persons are also queried and whether the

name is a mandatory field. You can decide whether accompanying persons are counted when the check is carried out against the maximum number of participants.

You can choose whether to create individual pdf tickets for companions or a collect ticket. wallet tickets are always collect tickets.

You can specify whether name tags should also be printed for companions.

## 2.6 Waitlist

### Waitlist

Under 'Event Dashboard -> Edit Registration -> Waiting List Type' you can activate a waiting list. If the registration deadline is exceeded or the maximum number of participants has been exceeded, the field 'waitlisted\_at' with the current date will be set for the participant and the participant will see the website 'Waiting list'. You can customize this website under 'Event-> Websites-> Waiting list'.

In his questionnaire, all answers will be deleted.

**Caution:** The waiting list is only valid for participation in the event, limits for questions can not have a waiting list.

Under 'Event-> Participants' you can set a filter for participants with a waiting list, you can also use this status as an option when sending an email. In the detail report is also a column with 'waitlisted at' added '.

The waiting list is for information purposes only, no automatic follow-up is performed. You decide if you want to address the participants on the waiting list. For this, you set the registration deadline or maximum number of participants high and send this participant a request to sign up.

## 2.7 Registration types

### Registration types

Next, you can specify whether the registration is only accessible to a closed subscriber group, or whether you want a public registration where new subscribers register with their name, etc. For legal reasons, the double opt-in procedure is mandatory:

- **None:** only participants who you have previously created under Contacts can register (see Creating and Importing Contacts). You usually send these participants an invitation email with which they can register.
- **Double Opt-In: Event website is public:** The event website is public. When the participant clicks on the registration button, there are 2 registration steps. In the first step, your first name, last name and email are requested. The registration thank you page will then be displayed and the registration email will be sent. In the registration email you will find the registration button, which will then take the participant to the second step. In the second step the questionnaire will be displayed.
- **Double Opt-In: Take contact details, then verify email:** the contact details (first and last name, email,...) are recorded on the public website. The participant will then receive an email, the text of which you can specify under 'Event Dashboard-> Emails -> Confirmation of Registration'. In the email you place the registration button that takes you to the event website.
- **Take contact details, then display website:** this option is no longer available for new events for legal reasons.
- **Show questionnaire, then show event website:** this option is no longer available for new events for legal reasons.
- **Registration closed Show text, do not allow registration:** The text for 'Registration closed' is displayed and no further public registrations are allowed. Existing participants can continue to answer the questionnaire.

Public registrations are visible to search engines. You can make a public registration with 'Public website can only be seen with secure token.', visible only for a closed group of persons. You can only access the registration page if you know a password for the registration. This password applies to the whole registration and can also be added to the URL.

## URL for the public page

The URL for the public page is event specific. You can find them in the event under Event-> Websites-> Public Page-> URL for the public website.

## Public and closed registration at the same time

You can also start a public and closed registration in an event at the same time.

**Caution:** a participant that you have already created as a contact can no longer register via the public registration, since yve prevents duplicates. Instead, he will be redirected to the login page, where he must log in with his login name and password. If he does not know this, he can send his login link to his email address via the button 'Send login link'.

If the existing contact is not yet assigned to the event, it will automatically be assigned as a participant for the event. This assignment triggers the registration email, if it is activated. If the contact is already assigned to the event as a participant, he will not receive a registration email. For registration type 'record questions, then show event website' no registration email will be sent.

In the case of an existing contact, the data (contact data and questionnaire) are not automatically taken over by the registration, but the questionnaire must be filled out again after the login.

## 2.8 To Dos Checklist

### To do checklist

In order to make your setup easier and to make sure you have done all the necessary activities, yve has a checklist ready for you. It is sorted by the most important areas. In each area there is To Dos, which you should go through.

A To Do can have the following states:

- **Warning:** this status is automatically assigned by yve as soon as something is clearly out of order. For Example, this is the case if the event website is still empty. Please be sure to edit these to dos.
- **Progress:** since yve can not understand if your texts are correct, this status will be assigned automatically as soon as there is no warning. For Example, this is the case as soon as something is written in the text of the event website.
- **Approved:** since only you know if a text or content is correct and final, this status is never assigned by yve, but you have to do it manually by checking it off. This will document that they have done this to do.
- **Inactive:** You can turn off most of the elements in yve (for example, the 'Approved page'). That To Do will then be removed from the list and automatically become inactive

The following To Dos are included in the checklist:

### Event Setup

These to dos are responsible for the basic settings of the event, the registration and the community.

- **Event Basic Data:** Has all important event data been entered correctly (title, date, time, location, ...). This data can be entered under 'Event Dashboard -> Edit Event'.
- **Registration Basic Data:** Is all registration management data correct (Max. number, companions, public, ...). This data can be entered under 'Event Dashboard -> Edit Registration'
- **Community Setup:** Is the community set up correctly (title, members visible yes / no, ...) or switched off. This data can be entered under 'Event Dashboard -> Edit Community'.

### Website Setup

These To Dos are about the contents of the various websites of the event. You can edit the content under 'Websites'.

- **Website Design:** Have all website design settings been set correctly (colors, navigation, salutation, ...). These data can be entered under 'Websites -> Edit Design'.
- **Public registration:** Is the content correct in all necessary languages?
- **Event Website:** Is the content correct in all necessary languages?
- **Questionnaire:** Is the content correct in all necessary languages?
- **Registration Thank you Page:** Is the content correct in all necessary languages?
- **Closed page:** Is the content correct in all necessary languages?
- **Approved page:** Is the content correct in all necessary languages?
- **Canceled page:** Is the content correct in all necessary languages?
- **Login page:** Is the content correct in all necessary languages? The Login page is account wide and can only be changed by administrators under 'account->login text'.

## E-mail setup

These To Dos are about the contents of the email templates. You can edit the content under 'Emails'.

- **E-mail sender:** Is the e-mail sender correctly set (display name, sender, answers to, CC, BCC). You can change the data in 'Emails -> Email sender'.
- **Save the Date:** Is the content correct in all necessary languages?
- **Invitation:** Is the content correct in all necessary languages?
- **Reminder:** Is the content correct in all necessary languages?
- **Final Details:** Is the content correct in all necessary languages?
- **Thanks:** Is the content correct in all necessary languages?
- **Confirmation:** Is the content correct in all necessary languages?
- **Cancellation:** Is the content correct in all necessary languages?
- **Confirmation Registration:** Is the content correct in all necessary languages?
- **Confirmation Verification:** Is the content correct in all necessary languages?
- **Confirmation Delegation:** Is the content correct in all necessary languages?
- **RSVP Attachment:** Is the content correct in all necessary languages?
- **Ticket Attachment:** Is the content correct in all necessary languages?
- **Calendar Appendix:** Is the content correct in all necessary languages?

## Participants

- **Assign Participants:** Are all participants assigned or has the public registration been activated. You can assign participants in 'Participants -> Assign participants'.

## Test

- **Test Registration:** Was a test registration carried out (acceptance and cancellation, possibly public registration). You can get to the registration with 'Websites -> Preview'
- **Test E-Mail:** Has a test e-mail been sent for all active e-mail templates. You can send emails with 'Emails -> Create email campaign'.

## Activation

- **Activate registration:** Has the registration started (invitation sent, link to public registration active, ...)

### 2.9 Event Setup Tips

- Switch off elements that you do not need - this will make your setup easier to understand
- Go through all To Dos, even if you have no changes
- Put all final To Dos as approved and reset as soon as changes are needed
- Print out the To Do list for team communication
- If you have more than one subscriber group that needs to see different content, set up a separate event for each subscriber group. You can copy events completely with all web page content.
- Do not forget to adjust the maximum number of participants. Remember that you will also have participants who do not come, even though they have accepted the invitation



## 3 Edit event website

### 3.1 Event websites in yve

#### What are the event websites?

Each event has its own websites where you can display all the information about the event and participants can register:

- **Public Registration:** This page can be activated if you want to attract new participants
- **Event Website:** Here you can find information about your event and the button for the questionnaire
- **Questionnaire:** Contains the survey to the participants, contact data and freely definable questions
- **Registration Thank you:** Shown after the public registration at the type 'Email' after registration
- **Event closed:** page will be displayed when you close the registration
- **Approved and Canceled page:** Page is displayed after the participant has confirmed or canceled
- **Login Page:** Page is displayed when you call [account.yve-tool.de/login](https://account.yve-tool.de/login) to log in or when a participant logs off. This page is account wide and can be customized by administrators under 'Account'.

You can change the contents by clicking on the name of the page, via active / inactive change the activation status and on the To Do status you can set the corresponding To Do to done.

Under 'Event -> Registration -> Starting Page Registration', you can specify whether the event website is displayed after clicking the response button or directly the questionnaire.

#### Set website content

The event website has a predefined structure, you can edit the contents of each element:

- **Header:** The header area is always displayed on all tabs. This is usually the title of the event or the banner of your event
- **Tab:** You can display 0-7 Tabs below the header. A tab is displayed as soon as it has a content. If you do not want to display a tab, simply delete its contents.

As an account holder, you are responsible for the content of your event website. **Caution:** remember to submit the legally required data for your imprint, data protection and any general conditions to your event website and public page.

### 3.2 Customize the design

#### Customize the design

Yve has a white label approach that allows you to customize colors and names of control elements:

- **Background and colors:** upload a background image and adjust the colors of the text, links, tabs, borders, ... for the event website and public registration. **Caution:** Changes in the font colors are not all displayed under 'Events-> Websites-> Event Website'. Please use the function 'Events-> Websites-> Preview Website', and you will see the event website as a participant
- **Navigation:** determine whether the event website has a navigation bar above and a sidebar to the right of the page. This navigation element is only necessary if you have several events simultaneously for a participant or a community.
- **Tabs:** specifies the name for the tabs. Tabs are displayed as soon as they have a content, regardless of the name.
- **Buttons text and color:** You can set the color and the name of the login button (on the event website), the registration button (public registration) and the community button (on the event website)
- **Fonts:** You can upload your own font under 'Account -> Own Font' as an administrator, which will then automatically be displayed in the editor.

#### Responsive design

Yve uses a so-called responsive design. Yve automatically detects the width of the screen and adjusts the display. This makes your website easy to read on a PC as well as on a smartphone. There are four levels of representation:

- Large screens (e.g., desktop with HD monitor)
- Medium sized screens (e.g., desktop with small monitor)
- Small screens (e.g., touchpad)
- Mini screens (e.g., smartphone)

We recommend developing your website for large screens and testing the other sizes by making your browser window narrower. Texts are automatically collapsed to the width of the screen, and yve automatically adjusts all images larger than the respective screen to 100% of the screen. From the touchpad and smaller level, the sidebar is displayed below, the navbar is collapsed and the tabs are stacked horizontally.

The following widths apply to large screens (important when you want to insert a banner across the entire width, for example):

- Website: 840px content + 2 \* 30px border
- Public page: 690px Content + 2 \* 30px border

### 3.3 HTML Editor

#### The HTML Editor

The editor, with which you can change the content for the web pages, automatically translates your entries into HTML - you do not need to program anything. The following menu options are available in the editor:

- **Edit text:** you can search, copy and paste in the text, and undo actions
- **Change font:** you can display your text in bold, italic, or underline.
- **Inserting images:** You can upload images (jpeg, gif, png) to our server and then position the image in your text. Position the cursor where you want the image to appear. Click on the 'Image' button, then 'Browse Server' and then 'Upload'. Now you can use a file browser to search the image file on your PC. Then click on 'Open' and then on your picture as soon as it is uploaded to our server. Now you can adjust the width / height and. With 'Ok' the image is displayed in the editor, press 'Ok' again to save. If you want to delete an image from our server, simply click on the 'x' icon in the upper right corner of the image in the server file browser. **Caution:** deleting the image on the server affects every reference to that image.
- **Insert links:** enter the name of the link in the editor and mark it with the cursor. Then click on 'Link' and enter the URL. When they click on 'Browse Server', they can upload a document (doc, ppt, xls, pdf) to our servers, which can be downloaded using this link (see above). **Caution:** make sure that your links are https:// if possible, ie SSL encrypted. If you include a link with only http:// without SSL, your page will display a warning in browsers in the upper left corner of the URL (yellow exclamation mark for the certificate, will be marked with 'parts of the web page not secured' if you click on it).
- **Insert table:** position your cursor and then click on 'table'. Now you can specify the number of columns and rows, the frame (0 for no frame), and cell spacing. The table is the ideal way to accurately position elements like images on your page. Caution: HTML5 ignores table cell spacing (cellpadding). Go to 'Advanced' and add the following commands under 'style': 'border-collapse: separate; border-spacing: 5px;' (Replace 5px with your distance).
- **Insert lists:** they can insert numbered or point lists
- **Horizontal line:** Insert line for better readability. **Caution:** Be sure to use this feature for separating lines, as it will automatically adjust the screen width.
- **Page break:** this function inserts a page break, which can only be seen on the pdf version.
- **Change alignment:** they can change the alignment of their text
- **Change font:** You can change font, size, and color
- **Change line height:** You can change the line height.
- **Show source code:** If you are able to program HTML, you can display the HTML code of your page and make changes. **Caution:** this is only for HTML professionals. Some HTML tags are disabled for security reasons and are automatically removed by yve, e.g. Script tags or URL parameters. Removing the tags can cause a difference between the display in the editor and the display on the web page. Please check if your HTML code is accepted and displayed correctly on the web page.
- **Merge tags:** Insert a placeholder (see chapter [Merge Tags](#))

### 3.4 Merge Tags

#### Variable content with placeholders (Merge Tags)

You can insert variable content with placeholders (we call them merge tags). You will then see the placeholder in the editor with | \* yve \_.... \* | by pressing the Button 'Merge Tag' in the Editor. Which is then automatically updated by yve with the individual contents, e.g. salutation is replaced. The following merge tags are available for the event website:

- **Button Response:** sets the login button to this place. The login button opens the questionnaire.
- **Button Community:** sets a button with a link to the event community.
- **Button Event:** sets a button that leads to the event website.
- **Button Nominees:** sets a button, which generates an Excel list of all nominated persons.
- **Button Open Registration:** Sets a button that opens the public registration for the event.
- **Button Profile:** Sets a button that leads to the participant's profile
- **Survey Responses:** places the questions and answers of the participant at this point.
- **Greetings:** sets the individual salutation to this place as defined under Salutation.
- **Logout link:** sets a link with which the participant can log out
- **Contact Familyname:** sets the surname of the participant
- **Contact Firstname:** sets the first name of the participant
- **Contact Title:** sets the participant's title
- **Contact Company:** sets the company of the participant
- **Contact Position:** sets the position of the participant
- **Contact Country:** sets the country of the participant
- **Contact Email:** sets the participant's email
- **Companions:** sets the number of companions
- **Companion Names:** sets the names of all companions
- **Sales Contact:** sets the sales manager of the participant
- **Contact Field 1-6:** sets the content of the respective user-defined contact data field
- **Contact invitation ID:** sets the invitation ID
- **Contact unsubscribe:** sets an Unsubscribe Link (see chapter on GDPR)
- **Contact subscribe:** sets an Subscribe Link (see chapter on GDPR)
- **Event Title:** sets the title of the event
- **Event Description:** sets the description of the event
- **Event Location Name:** sets the name of the venue
- **Event Location Address:** sets the address of the venue
- **Event Start Date:** sets the start date of the event
- **Event End Date:** sets the end date
- **Event Start Time:** sets the start time of the event
- **Event End Time:** sets the end time of the event
- **Event imprint:** the event imprint
- **Event Video 1-5:** sets Youtube Video 1-5 (enter ID in Websites->Youtube Videos, first ID is autoplay). Put Merge Tag in a table to adjust the size of the video.
- **Account Company:** sets the company of this account
- **Account Logo:** puts the account's logo to this place
- **Today's Date:** sets today's date
- **Google Maps:** You can set an interactive Google Maps with up to 5 marker. The addresses of the places for the marker and the zoom level can be entered at 'Websites -> Google Maps'. For the zoom, 0 is completely zoomed out and 20 is completely zoomed in.

### 3.5 Greetings

#### Salutation and display name

On the event website and in the emails, you can have a personalized salutation and the name of the participant displayed.

In the **general salutation** yve, the contact detail field 'Gender' decides which form of salutation is selected: female, male, divers or unknown. For these four variants, you must specify the appropriate text in 'Event->Websites->Salutation'.

Under **individual salutation** you can set whether this general salutation should be overwritten individually. yve then checks for each participant, whether in the contact details for him the **field 'salutation'** is filled in. If yes, this is used, otherwise the general salutation is used. You can decide whether or not to add the name as selected in the individual salutation.

Finally, you decide which name parts are displayed after the title: first name and / or title. Yve then automatically adds a comma to the end. For the divers salutation, titel + firstname + faminlyname is always chosen.

### 3.6 Language

#### Language

With yve you can display all content for participants in German, English or French. The administration area of yve can be displayed in German or English.

You can select the language for participants in the event under 'Event -> Edit Event -> Languages for Participants'.

For each language selected, there is then a separate content for all content displayed. If you omit one of the contents, the next language will automatically be displayed according to the following rules:

- DE -> EN -> FR
- EN -> DE -> FR
- FR -> EN -> DE

You can specify for each contact which language is selected for him: ' Contact Details -> Language '. If this value is not filled in, your account language will be selected. Each participant can change the language at any time via the navigation bar at the top.

Only available languages for the event will be displayed. If no languages available for the event are filled with content, the next language is automatically displayed according to the above rules.

### 3.7 Videos, Maps & Analytics

#### Youtube videos

In yve you can view up to 5 youtube videos on the event website.

To do this, place the Merge Tag 'Event Video 1' - 'Event Video 5' on the event website.

You can set the Youtube IDs of these videos under 'Event -> Websites -> Videos (Youtube).

**Caution:** Please do not copy the complete link of the video in the field, but only the video ID.

Yve then calls the Youtube ID on the youtube.com api and shows the video in the location of the corresponding Merge tab. The videos are streamed by Google inc. .

**Caution:** To do this, the user's IP address and other technical data, such as e.g. browser and operating system will be sent to Google. You should use a cookie banner that requests the participant's consent (see user manual 'Cookie Banner'). Please ask you data protection officer how you can use youtube.

The first video has activated autoplay, i. the video will start as soon as the website loads. If you do not want autoplay, just leave the first video blank and use Video 2-5. All videos use the automatic loop.

#### Google Maps

You can display an interactive Google Maps with 5 pins (places) on the website. Only one map can be displayed.

To do this, place the merge tag 'Google maps' on the event website.

You can enter the locations for the map under 'Event -> Websites -> Google Maps'. The locations will be displayed as a pin with the label of the address.

The zoom level 0-20 determines what zoom is set on the map when it is shown. The smaller the value, the farther away is the view, 0 corresponds to the whole world.

Yve then calls the pins at the Google Maps API and shows the interactive map in the location of the merge tag. The map is generated by Google Inc. .

**Caution:** To do this, the user's IP address and other technical data, such as e.g. browser will be sent to Google. You can use a cookie banner that requests the participant's consent (see user manual 'Cookie Banner'). Please ask your data protection officer how you can use google maps.

## Google Analytics

You can enter your own Google Analytics Property ID under 'Account->Google Analytics ID' if you have activated the cookie banner. yve then uses this ID to send Anylse data to Google.

**Caution:** To do this, the user's IP address and other technical data, such as e.g. browser will be sent to Google. You must use a cookie banner that requests the participant's consent (see user manual 'Cookie Banner'). Please ask your data protection officer how you can use google analytics.

### 3.8 Cookie Banner

#### Cookie banners

You can set under 'Account->Use Cookie Banner' that participants see a cookie banner first when they access the event website. The cookie banner displays an explanatory text and you can query whether only necessary cookies or optional cookies are placed.

**Necessary cookies:** yve sets so-called session cookies, which are technically necessary to identify the session. These cookies are removed after the session. yve only works with these cookies. Technically necessary cookies do not require the participant's consent.

**Optional cookies:** if you use Google Maps, YouTube or Google Analytics, additional optional cookies are necessary and technical data such as IP address, browser and operating system are transmitted to Google. According to the GDPR, you must request the participant's consent for this.

The consent is then stored in a cookie. yve uses this cookie to recognize whether the participant has consented.

You can set the **text of the cookie banner** under 'Account->Cookie Banner Text'. The default text is a non-binding example, please ask your data protection officer which text you need.

You can also set **links for your legal notice and privacy policy**.

### 3.9 Event community

#### What is a community?

A community is a message board on which your event participants can post contributions. The community is a closed company - only participants of your event can participate in the event community and see the contributions. A post may include text, photos, files, or even surveys. All participants can comment on contributions, set them as 'likes' and vote.

#### Create the event community as an administrator

Each event automatically receives an event community, but it is not activated yet. If you do not want a community, leave this status just as it is. To activate the community, click on 'Event Dashboard -> Community' - and set the status to 'open'. Now all participants have access to the community. Titles set the title of the community.

Click on the 'Manage Community' button to go to the community section of the community. You can not post as an administrator, but you can delete any post. If you want to post your own contributions, you must

create a participant.

Finally, you can change the background of the community with 'Event Dashboard -> Community -> Background'.

## Benefits of the community as a participant

To join the Event Community, you can use the sidebar in the 'My Communities' area, or if you have added the community button to the event web page with the Merge Tag. The community is only displayed if its status is 'open'. Use 'New Post' to create a new post. Each contribution can have a photo or a file attached. Yve automatically sorts all photos, files, and surveys into the appropriate tab, so that they can instantly see all the photos at a glance.

Under 'Members' you can see all community members. If they have activated the opt-in in the registration, they only see participants who have approved a listing. However, all event participants can always access the community and create contributions, even if they are not displayed by the Opt In.

## Start an online survey

With 'New Survey', each participant can start a new survey among the participants of the event. :

- **Status:** open or close the survey. A closed survey is displayed but can not be changed.
- **Show results:** put the checkmark to display the results of the survey.
- **Show ranking:** show the placement (1st place is the highest)
- **Maximum number of points:** the number of points that can be assigned to all survey fields.
- **Survey field 1-20:** the content of your survey. For example, different projects to be evaluated.

Once the survey is open, each participant can assign 1-10 points for each survey field, but not more than the maximum number of points.

## Tips for the perfect community

- You must give the participants a reason to go to the community and participate.
- Manage your community. Read the contributions, delete them if necessary
- You can also leave a community as long as the associated event is still open. This is how you achieve continuity.

### 3.10 Websites Tips

- If you want to have a simple website without tabs, simply create all content in the header and delete the contents for all tabs. This way no tabs are displayed and the website is one flat page.
- The best designs are often very simple: match the colors well together, position your texts so that they can be read without scrolling and don't over use pictures
- If you only perform one event, you should consider switching off the navigation (Navbar + Sidebar) so that the participants do not get confused by the options and are completely focused on your page. Remember to add a logout merge tag so that the participant can log out.
- You can count on the fact that some of your participants do not want to read long texts, but only want to make a quick statement. Therefore, position the login button as best as possible on the first page.
- If possible, renounce texts to images. Due to the responsive design, large images are always adapted to screen widths. If you look at the event website on a smartphone, the text in a picture becomes very small and possibly barely readable.
- Remember that you enter your legal information. As an account holder, you are responsible for the content.

## 4 Setup survey

### 4.1 Survey editor

#### How to get to the survey

You can reach the questions of the questionnaire via 'Event Dashboard -> Websites -> Survey'.

Here you see a preview of the survey and can add new questions with 'Edit survey'. The questionnaire starts with the question of participation.

If you add more questions, you can drag & drop them up with the cursor or delete them with the 'x'.

### 4.2 Add questions

#### Add questions

You have the following options to expand your survey:

- **Contact Data**
  - You can select which contact data of the participants are displayed and, if necessary, if it can be changed, including defining mandatory fields. You can change the label of the contact fields. **Caution:** First and surname should not be editable. You can add a delegation instead (see below)
- **Question on participation**
  - **Querying / not polling:** You can switch the question of participation off and on. Usually, this option remains enabled. Caution: when you turn off the option, you will no longer be asked to participate, which means that all your ads and reports will show your attendees as 'Open'. This option is only useful if you do not wish to manage the attendance, e.g. to start a survey.
  - **Request nomination:** each participant is given the opportunity to nominate participants. To do this, the participant can add a new contact or select one from the list of his or her already nominated contacts. You can view the list of all nominated participants via the report 'Participant Report -> Nominations'. Nominees will not be automatically invited to the nomination event, if you wish, you would need to create a second event and invite all nominees. **Caution:** please do not confuse the nomination with the possibility of bringing along a companion (this is set at 'Registration').
  - **Delegation:** if a participant answers with 'no', he can instead name another person by name and email, which is invited instead of him. yve will automatically send the email 'Delegate invitation' if this option is enabled. If you click on the delegation question in the questionnaire, you can change the text and visibility.
- **Self defined question**
  - **Text field (one line):** a simple text field, use this option if the answer is only 1-2 words long.
  - **Text area (three lines, expandable):** a text area, use this option for longer responses and sentences (e.g., 'have a message for us' ...)
  - **Number field (integer):** the answer must be an integer.
  - **Date:** the answer must be a date selected with the calendar. For birthdays, you should select display type 'Choose year first'.
  - **Time:** the answer must be a time in the format HH: MM.
  - **Select field (radio button):** inserts a predefined selection. You can add as many options as you like.
  - **Checkbox:** inserts a field in which you can set a checkmark for 'yes'
  - **Image:** inserts a question to upload an image. The image is automatically displayed with 'Survey Results' and can be downloaded in the participant report via a hyperlink.
  - **File:** inserts a question to upload a file. The file is automatically displayed with 'Survey Results' and can be downloaded in the participant report via a hyperlink.
  - **Text area without question:** you can insert a text with images

**Important:** Please do not ask for credit card information. This information may not be stored in yve, as this requires special PCI certification.

**Important:** If you request particularly sensitive information in accordance with Art. 35 GDPR, a data protection impact assessment is necessary. According to Art. 35 GDPR, data that is particularly worthy of protection are data that are likely to result in a high risk for the rights and freedoms of natural persons due



to the nature, scope, circumstances and purposes of the processing. Please contact your data protection officer.

### 4.3 Edit questions

#### Edit questions

Each question has, of course, its own question-text, which can be given in German and / or English. The description is displayed below the question and is for explanation (can be omitted). The title is used to define the column name for the evaluation. **Caution:** If you change a question, this question is also changed for existing answers. When you delete a question, all answers to that question are deleted.

Each question can have a given total limit. If this is reached, you receive a warning e-mail so that you can take action if necessary. As soon as the first participant exceeds the quota, the participant will be informed that the selection is no longer possible. You will also receive an email with the participant data.

The default value for the answer is given as an answer the first time the questionnaire is opened. This can be changed by the participant. This is useful if they know that most of the participants will choose an answer. For a selection field, the preset value must be one of the possible choices.

#### Special features for selection questions (radio button / dropdown)

If you have questions (radio button / dropdown), you can add the options for the selection with 'Add option'. The orientation of the options is set (one by one or side by side or dropdown or table grid), and you can specify a quota for each option. You can display the number that is still available with 'Show available (if limit is set)'. **Caution:** If you change the text for options after participants have already answered, their answer will be changed. If you delete options, the responses from participants who selected this option are also deleted.

### 4.4 Conditional questions

You can also only display a question under certain conditions:

- Show only on participation: You can display a question depending on how the question of participation is answered:
  - Question visible at Open and Accept. Invisible on decline: this is the default setting. When someone declines, the question becomes invisible and is reset
  - Question visible at Open, Accept and Declined: the question is always visible
  - Question visible at Accept. Question invisible at open and decline: is used if additional information is required in the case of a confirmation, which should not be seen before in the case of Open
  - Question visible at Declined. Question invisible at Open and Accept: is e.g. used if the reason for the decline is to be queried, but this should not be visible on acceptance.
- Show only question: For each question, you can specify that it is only visible when a particular question has been answered:
  - Checkbox: the tick of the master question has been set
  - Radio Button / Dropdown: A specific selection was made at the Master question
- Show only for label: For each question, you can specify that the question is only visible for a specific label. If you select an label, the question is displayed only for contacts with this label.

If the visibility of a question has been changed, this question is highlighted in the questionnaire editor with a gray background and gets the 'eye' symbol.

If a question is a required field, it will only be checked if the question is visible. For core data questions, the old value is retained.

If a question becomes invisible, its value is automatically reset in the database when the questionnaire is sent.

### 4.5 Answer questions



## Answer questions as an administrator

As an event administrator, you can answer the questionnaire for each participant by clicking on 'Event Dashboard -> Participants -> Questionnaire open / answered'. If you make changes there, no confirmation email will be sent. If you would like a confirmation email, simply click on the participant's login link and answer the questionnaire on the event website.

## Cancellations

If a participant changes his answer from 'Yes' to 'No', 'Event Dashboard -> Participants' will automatically show that this participant has canceled their participation. In the detailed report you can also see in the column 'Canceled at', when this happened.

### 4.6 Survey tips

- Economize with mandatory fields, each mandatory field can be a reason why a participant does not like.
- A good example of a meaningful mandatory field is compliance questions or the confirmation of the terms
- Radio buttons are machine readable and unambiguous (e.g., workshops, travel), use them as often as they can
- Radio buttons can no longer be deselected once a selection has been made, but only a different selection can be selected. Therefore, if necessary, add an option to deselect (e.g., 'no workshop')
- Do not turn off the query to participate, unless they are doing a survey and do not need participant management.
- Avoid changes to the questionnaire as soon as the invitations have been sent and the first participants have answered. Yve always shows the current questions and options, not the historical values.
- Add a text area as a comment field in which the participant can get rid of everything that the questionnaire did not cover

## 5 Edit and send emails

### 5.1 Emails in yve

#### Emails with yve

You can send emails to participants. To do this, you set the defaults under 'Event Dashboard -> Emails' and set the email sender. Emails are sent in HTML format.

**Caution:** Some email clients do not implement the HTML format correctly. Therefore, it is essential that you test emails before sending them to your participants (see 'Testing, testing, testing, ...').

Yve HTML emails have a width of 660px + 2x20px border (important for images that are to go over the whole width).

### 5.2 Legal requirements

## Transparency and Legal Requirements for Sending Emails via Yve

When sending emails, such as invitations and newsletters through Yve, strict legal requirements apply, particularly with regard to the General Data Protection Regulation (GDPR). To avoid your emails being categorized as spam and to comply with legal requirements, the following principles should be observed:

#### Recipient Consent

- Send emails only to recipients who have explicitly given you their consent to do so. The consent must come directly from the recipient. You can request consent in the questionnaire.
- Ensure that email addresses collected through a public registration are verified using an Double opt-in process. This process ensures that the email address actually belongs to the person who provided it. You activate the procedure in yve with 'Event->Edit registration->Public registration->Take contact details, then verify email'

#### Transparency About the Origin of the Address

- Every email you send should include a clear explanation of where the email address was obtained and on what basis you believe you are allowed to send the recipient emails. This is particularly important to avoid misunderstandings and build trust with your recipients.

#### Easy Unsubscribe Option (Opt-out)

- Every email you send via Yve should provide a simple method for the recipient to unsubscribe (Opt-out link). The recipient should be clearly informed on how to unsubscribe if they no longer wish to receive emails. Large email providers such as gmail, t-online, icloud, gmx, etc. require that a campaign email contains such a link, otherwise there is a risk that the email will be viewed as spam.
- All workflow emails are sent with the one-click-unsubscribe header. Currently only Apple IOS shows this header. You can place an unsubscribe link with the merge tag 'Contact unsubscribe'. Workflow emails that do not contain an unsubscribe tag automatically have a standard unsubscribe tag 'unsubscribe' placed at the end of the email.

#### Legally Compliant Imprint

- It is necessary to include a complete imprint in every email. This is a legal obligation, ensuring the recipient can clearly identify the sender of the email.
- You can use the merge tag 'Imprint', then enter your imprint under 'Event->Edit event->Imprint'.

#### Keeping Your Email List Updated

- Always keep your email lists up to date. Avoid bounce emails (non-delivery notifications). Remove email addresses promptly if you find that they are invalid or inactive, to prevent a high number of bounce emails and protect your sender reputation. With the 'Bounced' filter you can find all undeliverable contacts under Contacts.
- You can identify inactive contacts by creating an Excel report via 'Contacts->Reports->Contacts Details'. The 'created\_at' column shows the date the contact was created. In the 'current\_sign\_in\_at'

column you can see when the contact last logged in and in the 'sign\_in\_count' column how often.

By adhering to these principles, you help ensure compliance with legal requirements and improve the deliverability of your emails. This not only protects your own interests but also the functionality of the Yve Event Tool by reducing the risk of your emails being flagged as spam or Yve's domain being blacklisted.

### 5.3 Set email sender

#### Email sender

Under 'Event Dashboard -> Emails -> Email Sender', you specify the sender of the emails:

- **Name of the sender:** this is the sender's name. This may be a freely definable text, e.g. 'Invitation to the summer festival'.
- **Sender email:** this is the FROM email address of the sender. If no 'Reply To' address is specified, this address will be used. All bounce messages will be sent to this address. We recommend that you use a sender address from yve (kontoname@yve-tool.de). Most IT departments protect their own domains so that they can only be used with whitelisting and DNS entries (DKIM and SPF). The following options are available:
  - **yve e-mail address:** We will set up a mailbox alias kontoname@yve-tool.de for you. Emails and bounces are then forwarded to the account administrator, this is set for you by yve support. If your email server filters spam filters by company name, you must whitelist kontoname@yve-tool.de. yve email addresses have SPF, DKIM and DMARC set.
  - **Own sending address:** We can activate your own sending address from your domain. If your email server spam filter filters by company name, you must whitelist our email servers yve-mail-01.yve-tool.de to yve-mail-14.yve-tool.de. Your own sending addresses must be secured with SPF and DKIM:
    - **SPF:** An SPF record must be entered in your domain as a TXT record with the value 'v=spf1 mx include:spf.yve-tool.de ~all'. If you already have an SPF record, simply add 'include:spf.yve-tool.de'.
    - **DKIM:** we store a DKIM signature for you. To do this, you must store the following entries in your domain: CNAME yve.\_domainkey yve.\_domainkey.yve-tool.de . Please contact yve support to have the signature created.
  - **Your own SMTP gateway:** You give us an SMTP gateway (URL, user, password) through which yve then sends emails. yve can only send emails via port 587 or 25 with AUTH LOGIN (SMTP basic authentication) with STARTTLS. Caution: Unfortunately, Microsoft no longer offers this format, so you cannot send emails via Office365 or MS Exchange. The gateway must be able to send your email volume (emails per Sekond and per day) as a limit, your IT can then confirm this to you. If necessary, the IP addresses of our server must also be allowed by your IT.
  - **Own domain:** We create a new domain for you and set it up so that e-mails can be sent. This requires an available domain name and may involve additional costs.
- **Reply to email:** If a participant answers to the email, this email address will be used
- **CC / BCC:** puts an email address cc/bcc on any email. **Caution:** if you send invitations to 1000 participants, you will receive 1000 emails.
- **Set email2 as CC:** the e-mail address from 'email2' of the contact is set to CC.
- **Set assistant email as CC:** the email address from 'Assistant Email' of the contact is set to CC.
- **Participant log e-mail:** If a participant accepts or declines an invitation, a log email will be sent to this e-mail address, containing the data of the event, IDs and anonymized IP address.

### 5.4 Edit email design

#### Answer Button and change background

Yve can use two types of buttons in emails. With 'Reply Button', the participant can directly access the event website without having to log in. With 'commitment / cancellation button' he replies directly after a confirmation. You can change the text and color of the email buttons here.

The answer button contains the ID of the invitation and a 20-digit security token specific to the contact. You can re-generate the token for each contact under 'Contact Details -> Password -> Login Token generate new' if this is desired for security reasons. Old invitations for this contact will then no longer work.

Via **Email Background & Colors** you can change the defaults for background color, body color, font color, font, font size.

With 'Event-> Emails-> Email type names' you can change the name of the workflow emails and PDF attachments shown in yve.

## 5.5 Merge Tags

### Variable content with placeholders (Merge Tags)

You can read about the functionality of the editor in the article 'Edit Event Website'. You can insert variable content with placeholders (we call them merge tags). You will then see the placeholder in the editor with | \* yve \_.... \* | Which is then automatically updated by yve with the individual contents, e.g. Salutation is replaced. The following merge tags are available for emails:

- **Button Left:** sets the login button to the left. The button opens the event website. **Caution:** for emails, the position of the button can not be adjusted via the orientation. Therefore, there are buttons for left and centered alignment.
- **Button Center:** sets the login button centered. The button opens the event website.
- **Button Direct: Accept+Decline** sets the accept/ decline button left-aligned. Clicking opens the browser and a confirmation is requested. Only when the confirmation is clicked, the answer is set and then opens the website. The text and button for confirmation can be changed under 'Event-> Websites-> Button Text & Color'. **Caution:** the questionnaire is bypassed with this button.
- **Button Direct: Accept** sets the acceptbutton left-aligned. Clicking opens the browser and a confirmation is requested. Only when the confirmation is clicked, the answer is set and then opens the website. The text and button for confirmation can be changed under 'Event-> Websites-> Button Text & Color'. **Caution:** the questionnaire is bypassed with this button.
- **Button Direct: Decline** sets the decline button left-aligned. Clicking opens the browser and a confirmation is requested. Only when the confirmation is clicked, the answer is set and then opens the website. The text and button for confirmation can be changed under 'Event-> Websites-> Button Text & Color'. **Caution:** the questionnaire is bypassed with this button.
- **Button Open Registration:** set a button that opens the open registration of the event
- **Button Profile:** Sets a button that leads to the participant's profile
- **Greetings:** sets the individual salutation to this place as defined under Salutation.
- **Login General:** general login URL, login name and password of the participant. We recommend to use the buttons rather than the login, so avoid typing errors.
- **Login Event:** Login URL of the event, login name and password of the participant. We recommend to use the buttons rather than the login, so avoid typing errors.
- **Survey (list):** sets the questions and answers of the participant as a list (answers are available under the questions) to this place.
- **Survey (table):** sets the participant's questions and answers as a table (answers beside the questions).
- **Survey (table short):** sets the participant's questions and answers as a table (answers beside the questions). Only questions that have been answered are displayed. For checkbox questions, the question will only be displayed if a checkmark has been set
- **Contact Surname:** sets the surname of the participant
- **Contact Firstname:** sets the first name of the participant
- **Contact Title:** sets the participant's title
- **Contact Company:** is the company of the participant
- **Contact Position:** sets the position of the participant
- **Contact Country:** sets the country of the participant
- **Contact Email:** sets the participant's email
- **Contact Login Name:** participant's login name
- **Contact Login Password:** participant's password
- **Companions:** sets the number of accompanying persons
- **Companion names:** Sets the names of all companions
- **Sales Contact:** sets the sales manager of the participant
- **Contact Field 1-6:** sets the content of the respective user-defined master data field
- **Contact invitation ID:** sets the participant's invitation ID
- **Contact unsubscribe:** sets the link to unsubscribe from the newsletter
- **Contact subscribe:** sets the link to agree to the newsletter
- **Event Title:** sets the title of the event
- **Event Description:** sets the description of the event
- **Event Location Name:** sets the name of the venue

- **Event Location Address:** sets the address of the venue
- **Event Start Date:** sets the start date of the event
- **Event End Date:** sets the end date of the event
- **Event Start Time:** sets the start time of the event
- **Event End Time:** sets the end time of the event
- **Event imprint:** the event imprint
- **Account Company:** sets the company of this account to this place
- **Today's Date:** sets the current date

## 5.6 Email templates

### Edit email text

You can set the following e-mails in yve, the name serves as a hint, they can fill these templates with content as they wish and send them whenever they want:

- **Save the date:** before the event, to block the date with the participant
- **Invitation:** the actual invitation email. Should contain the registration button
- **Reminder:** to all participants with the status 'not answered', also here with registration button
- **Final Details:** shortly before the event with the answers to the questions and details on how to get there, etc.
- **Thanks:** after the event, possibly with a new survey as feedback

As an account holder, you are responsible for the content of your emails. **Caution:** remember to provide the legally required information for your imprint, data protection and any general terms and conditions in your emails.

### Texts for automatic emails

Automatic emails are sent by yve when the participant has performed certain activities:

- **Confirmation Accept:** is automatically sent to participants when they have accepted. Should contain the answers.
- **Confirmation Decline:** will be automatically sent to participants when they have declined.
- **Confirmation Registration:** will be automatically sent to participants if they have registered with a public registration.
- **Verification:** the participant has been checked with 'verify participant'
- **Delegation:** the participant has delegated another participant
- **Send login:** the participant clicked on the 'Send login link by email' button. Should contain the login link.

You can also set the sales contact 1 and / or 2 automatic BCC with the confirmation emails with 'Event Dashboard -> Registration -> Confirmation Emails bcc sales contact(s)'.

### Email attachments

You can add attachments to the emails. You can change the content under 'Event-> Emails-> Attachments':

- **RSVP:** pdf document as invitation, e.g. with QR code or login data for registration.
- **Ticket:** pdf document as admission ticket. With QR code
- **Wallet:** Wallet ticket for admission. If the participant's smartphone can read wallet tickets in passbook format .pkpass (e.g. apple iphone), a ticket is automatically added to the participant's wallet, which can be scanned for check in. **Caution:** Android phones can only read the passbook format if an app has been installed for it beforehand. You can set the colors for the font, heading and background. The logo is displayed in the top left, the dimensions should be at least 360px wide and 100px high. The banner is displayed below across the entire width, the dimensions should be at least 750px wide and 196px high. Data for date, time, event title, participant and location name + address are filled in from the event.
- **Calendar invitation:** ics file as calendar entry, e.g. as an attachment for the Save the Date.  
**Caution:** The date in the calendar entry is not tied to the event date.

## 5.7 Emails and language

## Emails and language

A German and an English version can be created for each email. If one language is empty, the other is automatically taken. If you send emails, yve will check with each participant whether a language has been defined for the contact. If no contact language has been set, your account language is automatically selected.

**Caution:** In the preview of 'Create email campaign', you will only see the language that is set for you in yve. You can see the alternative language by changing the language in the navigation bar.

## 5.8 Spam Filter

### Emails and spam filters

We regularly check yve against spam filters, but can not guarantee that yve emails do not end up in the spam filter. The yve email templates are tested against the common email spam filters:

- **Sending throttlet:** yve sends emails individually at a speed of about 2 emails per second. E-mails to the same recipient domain are sent with an interval of 1 second per yve e-mail server. This ensures that no server gets too many emails at once.
- **SPF:** Emails with the MAIL FROM yve-tool.de have a valid SPF record. If you use your own MAIL FROM address you have to set the SPF record for spf.yve-tool.de.
- **DKIM:** Emails are signed with the domain yve-tool.de. If you have your own FROM domain, you should also have a DKIM signature created. Please contact yve support for more information.
- **Sender ID:** Emails with the MAIL FROM yve-tool.de are set so that the Sender ID Check is positive. If you have your own sender address, you have to create an SPF record for spf.yve-tool.de.
- **DMARC:** Emails with the domain yve-tool.de are set so that the DMARC check is positive. If you have your own sender address, either DKIM or SPF must align. Please contact yve support for more information.
- **Graylisting:** some receiving e-mail servers reject the e-mail with a temporary error message on the first attempt at delivery, but then accept this after a further attempt. This means that spammers are rejected because they often do not attempt to deliver again. yve tries to deliver an e-mail starting 5 increasing to 180 minutes for 12 hours if a temporary error message appears. After that, it will be considered undeliverable and you will receive a bounce message.

If you have created your own sender address, you must make the entries for SPF, DKIM, etc. yourself in your domain (see above, email sender).

We cannot, of course, foresee the content of your email, there are many traps in which they can tap. Many spam relevant terms and of course all possible obscene terms are on the spam filter lists. Every email recipient has a long-standing personal relationship with his spam filter. This remembers content very precisely, if the recipient itself identifies an email as spam.

Therefore you should test your emails yourself, see the article 'Testing, testing, testing'.

## 5.9 Email bounces

### Email bounces

If an email that you have specified as the recipient is undeliverable, you will automatically receive a message about it (SMTP Error 5xx). The error code gives you an indication of the cause (e.g. 'User unknown' or 'Address rejected' mean that the receiving email server does not know the address).

yve receives the bounce message in parallel through the so-called 'postmaster copy'. If a receiving server doesn't send the 'postmaster copy' or uses non-standard formats, yve won't be able to process the bounce. This e-mail will then be automatically blocked to prevent the wrong email addresses from being sent. Please check the email and correct the email recipient. You can simply re-send it to a changed email address. You can get a list of all blocked contacts by setting the 'Bounced' filter on Contacts. In the detail participant report, the status is displayed in the column 'Email Status'.

If you believe that the reason for the bounce of an email has been resolved, you can unblock the email in



the contact details of the participant with 'unblock email'.

**Important:** Receiving email servers detect spammers by how many undeliverable e-mails a sender has generated in a given time period. If this number exceeds a threshold, the sender will be blacklisted and all e-mails from this sender will no longer be accepted, even if they are valid addresses.

To prevent this from happening for yve as a sender, yve will automatically cancel an email as soon as a certain threshold of undeliverable emails is exceeded.

Please keep your emails so that the rate of undeliverable emails does not exceed 5% and the rate of the complaints is not 0.1%. If this value is exceeded repeatedly, your account can be blocked.

There are services that verify email addresses for you without causing reputational damage (for example, <https://www.email-validator.net>). There you can upload your email addresses and verify them for a small fee.

If you have set up your own email gateway, yve will not receive any bounces and therefore cannot block any emails. If you have set up your own MAIL FROM, emails that were first accepted by the receiving email server and then later reported as a bounce to the MAIL FROM address cannot be recognized by yve as a bounce and are therefore not blocked.

## 5.10 Create email campaign

### Create email

To create an email, click on 'Event Dashboard -> Emails -> Create Email Campaign'. Enter a title for the campaign as an internal label (e.g., 'First Wave Invitations') and select the email type.

### Mail recipient

Now you see the preview for the email with all sender information, etc. At the bottom you see the selected recipient. To add recipients, click on 'Add Recipients' and select one of the following filters:

- **All:** all participants of the event
- **Email status (no, save the date, invitation, reminder, final thank you):** Participants who have a specific email status (for example, if they want to send an invitation to everyone who has already received a save the date)
- **Participation status (not answered, accepted, declined, checked in, canceled, verified, pending verification):** Participants with a specific response (for example, if they want to send a reminder to all who have not yet replied)
- **Identifier:** select individual participants who have a specific identifier
- **Individual:** select a participant

You can also delete individual participants from the recipient list with 'x'. You can also apply several filters one after the other, all filters add the participants with the appropriate conditions, the filters are not applied simultaneously.

### Send email

Once you have assigned all recipients, you can send them by sending them. You will be asked again if the total number is correct, afterwards the campaign will be carried out in the background.

Alternatively, you can also specify a 'Schedule' when the email is to be sent. At that time, the list of recipients currently in the campaign will be used. **Important:** Filters like 'Not responded' are not applied again at the scheduled time, the list of recipients is not updated.

Yve sends individual emails with a speed of approx. 2 emails per second. That means that a campaign to 1000 participants can take 25 minutes.

## 5.11 Email log

## Email and letter log

You can see all your emails and letters under 'Event Dashboard -> Emails'. Click on the number to see the list of participants. As long as they have not sent a shipment yet, they can edit it (click on name) or delete it.

## The communication workflow

Once you have sent an email or letter to a participant, yve automatically changes the email or print status for him or her with the corresponding email or print type. You can see in the overview under 'Event Dashboard -> Emails', how many participants are in the respective status. Yve always only keeps track of the email or print type of the last shipment, where the participant was present.

You will have latecomers for your event. These can easily be selected via filters, since they still have the status 'No Email'. In this way, the participants are continuously integrated into the workflow from above and can be processed step by step.

### 5.12 Email tips

- You can count on the fact that some email clients automatically block images and only download them when the participant clicks on a link. Avoid large images at the beginning of the email and make sure your email is understandable without pictures.
- Some email clients to disable links for security reasons. If they write links in the plain text, the participant can still copy the link and open it in the browser.
- Use tables to position texts and content
- Avoid items that would occur the same way in spam messages
- Send Reminder emails - this is not obtrusive, but polite and helpful.
- Sent the invitation more than 2 weeks before, the save the date 3 months before
- Remember that you enter your legal information. As an account holder, you are responsible for the content.
- Send a save-the date 2-3 months before event
- Send the invitation 2-4 weeks before the event
- Send 1-2 reminders to open subscribers
- Send the final details to all the attendees with the answers of the questionnaire one day before the event
- A thank you email after the event helps for customer binding to the participants
- You can also use your own email campaigning tool, the participant report contains all the necessary data.
- If they have participants without email addresses, they can still send a letter if they have the postal address. An invitation by letter should have a QR code and / or the yve login (Merge tag 'yve login')
- If you want to send a high-quality printed invitation, you can check with your printer whether or not they can print the individual QR codes and logins to the invitation. The printing company needs precisely the data that they receive from the participant report.
- It is easier to produce a high-quality print without individual data and to simply attach the individual data to a cover letter from the series letter.



## 6 Setup printing

### 6.1 Create letters

#### Create texts for letters

You can also use yve to create letters instead of sending emails to participants.

To do this, you can specify the print head area under 'Event Dashboard -> Printing -> Print header'. This is set by the size so that the print address can be displayed under the header area so that it can be seen in the letter view window.

Under Print footer, you can add a footer to the letter.

You can then specify the same number of texts for the serial letters for the different phases as the email texts. When you then create a print, a pdf document with all the letters will be generated, which is sent exclusively to you as a user. Then they only need to print and send the letters (see article 'Send invitations to participants and manage workflows').

### 6.2 Name tags

#### Name tags

You can print with yve name tags. Enter the text for the name tag under 'Event Dashboard -> Printing -> Name Tag'. Name plates can then be printed as 1 per page or 10 per page under 'Create print'.

- For 1 per page yve uses 54x90mm
- For 10 per page we used 54x90 Durable 1455 BADGEMAKER® 54 X 90 MM.

### 6.3 Create printing

#### Send letters and print nameplates

The process for letters runs just as much as for emails. You can see the preview for the serial letter or name tag with a 'Create print' and assign the recipients the same way as for emails. If you click on 'Print as pdf' yve creates a pdf document containing a letter for each selected participant. This document will be sent to you as a user by e-mail, then you need to print it out and send it by post.

## 7 Import contacts

### 7.1 Contact data

#### Contacts in yve

Participants always have to be contacts first. You can assign participants for events from the existing contacts. In contacts, there can also be suppliers, locations, employees, etc. Under 'Contacts' you will see all available contacts. You can create a new contact or copy an existing contact with 'Contacts -> New'.

#### Contact data

yve has 50 fixed contact data fields that you can use to describe a contact. These fields contain the address, language, birthday, gender, and fields with which you can map your sales process (e.g., sales contact, sales level, ...).

In addition to the pre-defined fields, you can also use 6 freely definable fields. You can define the names for these fields as administrator under 'Account -> Own fields'.

Each contact receives a machine-generated password and a security token upon creation. You can change the password under 'Contact -> Password' and regenerate the token. **Attention:** if you regenerate the token, the previously created email invitation buttons and tickets of this contact become invalid.

#### Find contacts

The 'Search' field searches for the terms you enter using the contact fields firstname, familyname, email, company, yve\_id, customer\_number and identifier. You can combine multiple search terms by entering them one after the other, separated by spaces.

With 'Filter' you can enter search terms individually for the core master data and also filter undeliverable emails.

#### Copy contacts

You can copy an existing contact. All fields are copied, the surname gets the suffix "COPY". Please check the name, email and login name. The password for the contact will be automatically regenerated.

### 7.2 Contact Fields

Folgende Felder sind in yve als Kontakt Stammdaten angelegt.

Alle Felder können importiert werden und sind im Detail Bericht enthalten.

Basis Felder (ohne yve\_id) und Address Felder sind für den Teilnehmer im Profil sichtbar und mit Ausnahme von familyname und firstname editierbar. Selbst definierte Felder können sichtbar gemacht werden.

Basis Felder	Beschreibung	Werte
yve_id	Identifiziert den Kontakt eindeutig in yve	<Zahl>, fest vorgegeben
gender	Geschlecht (wird bei der Anrede verwendet)	Female/Male/Divers/Unknown, oder Herr/Frau/Divers/Unbekannt
title	Titel (Dr., Prof.,...)	<Text>
firstname	Vorname	<Text>
familyname	Nachname	<Text>, muss vorhanden sein
email	E-Mail	<E-Mail>
email2	Alternative E-Mail	<E-Mail>
company	Firma/Institution	<Text>
department	Abteilung	<Text>
position	Position	<Text>

birthday	Geburtstag	<Datum>
place_of_birth	Geburtsort	<Text>
locale	Sprache	de, en
login	Login Name	<Text>, muss im Konto eindeutig sein

### Adress Felder

phone	Telefon	<Text>
cellular	Mobil	<Text>
fax	Fax	<Text>
website	Web Seite	<URL>
video_link	Video Link	<URL>
social_media_link	Social Media Link	<URL>
street	Straße und Hausnummer	<Text>
zip	PLZ	<Text>
city	Ort	<Text>
state	Bundesland	<Text>
country	Land	2 Buchstaben-Code oder Länderbezeichnung nach ISO 3166-1
assistent_fullname	Name Assistent	<Text>
assistent_phone	Telefon Assistent	<Text>
assistent_email	E-Mail Assistent	<Email>

### Selbstdefinierte Felder

field_1	Selbst definiertes Feld	<Text>
field_2	Selbst definiertes Feld	<Text>
field_3	Selbst definiertes Feld	<Text>
field_4	Selbst definiertes Feld	<Text>
field_5	Selbst definiertes Feld	<Text>
field_6	Selbst definiertes Feld	<Text>

### Zusatz Felder

customer_number	Kunden-Nummer	
category	Kategorie	Customer, Location, Hotel, Restaurant, Caterer, Technical_Equipment, Artist, Other_Supplier, Staff, Employee, Participant, Press
salutation	Individuelle Anrede (überschreibt die Gender Anrede)	<Text>
description	Beschreibung	<Text>
comment	Kommentar	<Text>
shortcompany	Firma Abkürzung	<Text>, maximal 15 Länge
notify	Nachricht über Community updates	instant, none, daily, weekly
reg_info1	Freies Feld	<Text>

reg_info2	Freies Feld	<Text>
test_flag	Test Kontakt	true, false
contact_flag	Emails angenommen	true, false
status	Status	active, passive
label	Kennung des Kontaktes	<vorhandene Kennung, durch Kommas getrennt>

### CRM Felder

salesfunnel	Verkaufsstufe	Prospect, Contacted, Interested, Negotiation, Contract, See_later, Lost
servicelevel	Service Level	Bronze, Silver, Gold, Platinum
industry	Industrie	<Text>
source	Quelle	<Text>
targetgroup	Zielgruppe	<Text>
potential	Potential	<Zahl>
chance	Chance	<Zahl>
other	Andere	<Text>
salescontact	Verkaufs-Kontakt Name	<Text>
salescontact_email	Verkaufs-Kontakt Email	<Email>
salescontact_2	Verkaufs-Kontakt Name2	<Text>
salescontact_email_2	Verkaufs-Kontakt Email2	<Email>

## 7.3 Import contacts

### Import contacts

If you want to invite a lot of participants for an event, you can first create them using a Microsoft Excel (.xlsx) file as a contact under 'contacts -> import' and then assign them to your event. Only administrators can import contacts. Yve knows more than 40 attributes with which you can describe a contact. You can see the complete list in the user manual under Import Fields. Only the surname is a mandatory field, all other attributes are optional and can be omitted.

For yve to map the columns from your .xlsx file to the correct attribute, you must name the columns as they are in yve. In the overview of the attributes, you see the yve labels that are present. Some of the attributes have fixed values, e.g. 'Gender' -> 'Male, Female, Unknown '. For these attributes, the values in your cells must exactly match one of the given values so that yve can assign the values. Select your file with 'File -> Browse' from your PC. Please ensure that your .xlsx file contains only one workbook containing your contact data.

Columns that could not be identified are ignored during import. If you want to change contacts, only the attributes for which a column has been found in your xlsx file are overwritten - all non-found attributes are not changed.

### Behavior when importing

You can select what yve should do when importing:

- **Insert new contacts:** yve only imports new contacts. If yve already have a contact on your list, this entry is ignored
- **Insert new contacts and update existing ones:** yve imports new contacts. If yve already have a contact on your list, it will be used to update all attributes of this contact with the values from your list.
- **Insert new contacts and update existing ones and delete missing ones:** yve imports new contacts. If yve already have a contact on your list, it will be used to update all attributes of this

contact with the values from your list. In addition, yve checks for each of the existing yve contacts whether it is in your list. If the contact is not in the list, yve sets a flag to delete this contact. You are then prompted to confirm the deletion. **Caution:** if you upload an empty list with this option, all your contacts will be marked for deletion.

## 7.4 Identification and validation

### Identification of contacts

Yve identifies a contact by one of the following characteristics:

- **yve\_id:** this is an identification number that is automatically assigned by yve and is unique in the system. You can read these yve\_ids for existing contacts by selecting 'Contacts -> xls'. I.d.R. You do not need the yve\_id.
- **customer\_number:** they can give an identification number to a contact itself. Yve make sure this number is assigned only once in your account. For example, To retrieve your contact data from a CRM system, you can load the ID from the CRM system into this attribute.
- **Other:** You can set under '**Account->Contacts are identified by**' whether additional fields are used for identification. **Caution:** You can only change the setting if all of your existing contacts meet the rules of the new setting. Your options are:
  - **None - Duplicates are allowed:** no other fields are used for identification. This allows duplications. This setting makes sense if you do not use yve as a customer database and mainly carry out public registrations. Each registration leads to a new contact, this prevents yve from asking for the password for an existing contact.
  - **familyname + firstname + email:** To avoid duplicates, yve makes sure that the combination of last name, first name and email is only used once in your account. That's why yve recognizes contacts if you provide these values. This setting allows you to create contacts without email or even contacts with the same email address if they have different names. Since names can easily be spelled similarly, you will run the risk of duplicates with similar names using this setting.
  - **email:** To avoid duplicates, yve makes sure that the email in your account is only assigned once. That's why yve recognizes contacts if you enter these values and email is therefore a mandatory field. This is the strictest setting and allows strong control over your contact information. Duplicates are only possible with different email addresses.

### What does yve check on contacts?

When you upload your list, yve performs a series of checks in the background yve before the list is created in Contacts. If a condition is not met, the entire list will not be uploaded and you will receive a list of errors by email:

- Your list can not contain duplicates based on the rules of identification (see above)
- A valid email address must be provided
- Each line must contain a value for familyname (surname)
- If you are using gender, the values must be 'Male', 'Female', or 'Unknown'
- Each row in your list with a value is checked - remove all rows that do not contain contacts (or the column name at the top)

Only if the whole list is error-free, the contacts are imported and you receive the success message by email.

## 7.5 Create labels

### Create participant lists with labels

As an administrator, you can create as many labels as you like, using 'Contacts -> labels -> new'. This may be e.g. a customer group or an identification for all participants of an event. Each contact can be assigned to any number of identifiers. You can assign this assignment manually via 'Contact details -> assign label' or via the import.

In the import, simply add a column with the heading 'Label' and add the identifiers that the contact should have in the respective line. You can specify multiple identifiers separated by commas. Only identifiers existing in yve can be assigned.

## 7.6 Assign contacts to an event

### Assign participants to an event

Now you can assign your contacts to an event: 'Event Dashboard -> Participants -> Assign participant', the following options are available:

- All contacts: assigns all contacts to the event. If you only perform one event and all your contacts are only attendees, this is the easiest way
- Subscribed: all contacts who have set the contact data field 'subscribed' will be assigned to the event.
- By label: select one of the existing labels and yve assigns all contacts that have this label to the event
- Individual: select a single person from your contacts. This is usually the most practical way for latecomers.
- List: You can upload a list in yve that contains all yve contacts to be associated with this event. You will hardly need this option since the same functionality with identifiers is possible and easier to manage.

Yve checks whether a contact is already a participant and thus prevents doubles. A contact can thus occur in several labels without generating doubles. The contacts are assigned in the background, you receive an email on completion.

### Filter participants by invitation status

In the Event Dashboard -> Participants view, you can see all attendees of your event with the registration status. You can display participants with a specific registration status by clicking on 'Filter'.

### Perform actions on participants

By selecting 'Event Dashboard -> Participants -> Actions', you can assign a label to participants with a specific registration status (for example, all participants who have accepted). This allows you to easily select them, e.g. if you want to invite them to another event.

You can close or open the registration for participants of a specific label by clicking on 'Close/open registration for participants'. If you assign a participant to the event, the status is automatically 'open'. If you close the registration for participants of a label, the 'registration closed' website is displayed instead of the event web page for these participants, all other participants can still access the event website and register.

You can also perform actions on a single participant by clicking 'Action' under 'Event Dashboard -> Participants' in the row of the participant.

### Delete participants or contacts

You can delete a participant by clicking on the 'x' at the end of the line with the name of the participant in 'Event Dashboard -> Participants'. **Caution:** this does not delete the contact, only the contact is no longer assigned to this event. If you want to delete a contact completely, you can do this via 'Contacts -> Subscriber name -> Contact details -> Delete'.

## 7.7 Automatic deletion

### Automatically delete contacts

Under Account->Use automatic deletion of contacts' you can set whether and how contacts are automatically deleted from your account. This is useful if your privacy policy requires contacts to be deleted after a period of time.

The deletion is permanent and cannot be reversed. All answers to questionnaires from the deleted contacts will also be deleted.

The last event end date to which the contact is assigned is taken as the basis. If a contact is not assigned to an event, today's date is used. One of two deadlines is added to this base date to calculate the deletion date:

- Without general consent (days): This deadline applies if a contact has not consented to receive

emails. Consent is given in the declaration of consent with the yve tag 'Accept emails' or by setting 'Emails accepted' in the contact.

- With general consent (years): This period applies if a contact has consented to receive emails. Consent is given in the declaration of consent with the yve tag 'Accept emails' or by setting 'Emails accepted' in the contact.

The actual deletion will then take place on the deletion date at 11:30 p.m. CET. If a contact is assigned to a new event with a later end date, the deletion date is updated. The deletion date can only be extended by updates - if a shorter deletion date is calculated by the update, the old deletion date will be retained.

## View deletion date

You can see the deletion date for a contact by clicking on their name under Contacts. The deletion date is displayed in yellow at the top.

In the 'Event Detail Report', 'Event Self-Defined Report' and 'Contacts Detail Report' reports, the 'autodelete\_at' column is available, which contains the deletion date.

## Notifications for automatic deletion

You can set which notifications you want to receive when contacts are deleted:

- User:
  - Under 'User->Edit->Emails for pending deletion of contacts' you can set that a user will be informed about the pending deletion of contacts.
  - These users will receive an email informing them of the total number of deletions from that day at 6:30 CET on the day of deletion.
- Contacts:
  - Under 'Account->Use automatic deletion of contacts->Inform contacts before deletion' you can set that contacts are informed about the pending deletion.
  - Under 'Account->Use automatic deletion of contacts->Notify contacts before deletion (days)' you can set how many days before deletion the notification will take place.
  - You can change the content of the email under 'Event->Emails->Deletion'. You can also put a yve tag there so that the contact can accept emails.
  - The event that has the last end date for the contact is always selected for the email. Contacts who are not assigned to an event will not receive a notification email.

## 7.8 Contacts tips

- The Email field can contain only one email address, remove multiple email addresses for contacts
- If you want to change familyname, firstname or email of an existing contact, you must specify the yve\_id or customer\_number, otherwise yve will create a new contact with the new data
- Remove leading or trailing spaces, all characters of a cell are evaluated as input (ie also behind emails or predefined values)
- Your .xlsx file should contain only one workbook with your list. Remove all data that should not be considered as input
- For participants you need i.d.R. Only familyname, firstname, email, and gender - all other fields are optional
- Use the CRM fields (source, salescontact, ...) to assign participants to specific sales activities
- Use the freely definable fields (reg\_info1, ...) for further information

## **8 Data protection (GDPR)**

### **8.1 Checklist for the GDPR**

As part of the GDPR, some changes have been made that make it necessary for you, as the person responsible, to take data protection measures.

The GDPR now has a greater reach, more rights for those affected, stricter rules for data processing and much higher sentences than the provisions of the BDSG before.

To make it easier for you to prepare for compliance with the GDPR regulations for your use of yve, we have put together in this chapter on the next pages a non-binding checklist and example for you.

### **8.2 Privacy statement**

You need a privacy policy. This should be written in an easily comprehensible way according to the GDPR. A reference to the privacy policy of yve is not sufficient, because you yourself are responsible for the data processing carried out by you within the meaning of the GDPR.

A privacy policy must have the following minimum content:

- Information about the person responsible
- Purposes of processing
- Legal basis (s) of processing
- storage duration or criteria
- Legal rights of user
- Use of yve as a processor

If the following services are used, the corresponding information is also required:

- Contact details of the data protection officer
- If the legitimate interest is stated under "Purpose of processing" (Article 6 (1) (1) (f)), the interests underlying the balance of interests must also be stated
- Additional recipients or categories of recipients of personal data
- Transfer of data to other EU countries
- Automated decision-making and profiling "

If you use the option in yve to integrate Google Maps or Youtube into your event website, the user's IP address and other technical data, such as e.g. browser and operating system will be transmitted to Google Inc. This should be indicated in your privacy policy and you should get a consent from the user. Please ask your data protection officer about this.

### **8.3 Data processing agreement**

Since you use yve as your data processor, you are obliged under GDPR to conclude a data processing contract with us.

For this we have sent you a questionnaire, which you can conclude in electronic format with us.

Without data processing contract you are not allowed to process personal data with yve.

### **8.4 Lawfulness of processing**

The GDPR is basically a prohibition regulation with reservation of permission, i. everything is forbidden, which is not expressly allowed. This applies in particular to the lawfulness of the processing.

The following conditions constitute lawful processing under DSGVO:

- a. The consent for the purpose of the data processing was granted (kind 6 exp. 1 S. 1 lit. a DSGVO)



- b. The processing serves the fulfillment of a contract or preliminary contract (Art. 6 (1) sentence 1 (b) DSGVO)
- c. There is a legal obligation (Article 6 (1) (1) (c) GDPR) or a public interest (Article 6 (1) (1) (e) GDPR) for processing
- d. There is a legitimate interest of the person responsible, which outweighs the protection interests of the person concerned (Article 6 (1) sentence 1 (f) DSGVO). This is especially the case when
  - i. The affected customer or employee is and
  - ii. Direct mail for similar products (see § 7 Abs. 3 UWG) is available.

Whenever you refer to Art. 6 para. 1 sentence 1 lit. If you wish to invoke DSGVO as a legal basis, you should actually carry out the balancing of interests and scribble the result as evidence, eg in the respective list of processing activities (Article 30 GDPR).

It is inadvisable to collectively obtain the consent of your customers in order to be able to rely on it, since there is the danger that there will be no effective consent at all and that they must always expect the customer to withdraw their consent. So if you can base the processing on other legal bases, you should do that mainly. Apart from that, it is important to keep in mind what an approval for conditions is. Consent is a voluntary acknowledgment of will in an informed manner. This means that you first have to provide information about the exact purpose and the personal data required for this purpose, and you must give your consent, e. G. in the form of a tickbox check box not as a mandatory field, otherwise it is not voluntary (who should say 'yes' voluntarily, must also be able to say 'no' without any consequences). The person concerned must also be informed that consent can be revoked at any time and by what means. He may not incur costs, except, for example, ordinary telephone costs (landline telephony).

You should therefore disconnect between

Data given to you by a participant to attend a specific event (ie data required to attend the event)

The right to invite or contact him afterward.

The legal situation as to whether public registrations for an event require any consent for item 1 is controversial. In some cases it is assumed that there is (implied) consent in filling in the form itself. In that case, a reference to your privacy policy would be sufficient. If necessary, please contact the responsible regulatory authority or your national data protection officer as to how this is handled in your state.

## 8.5 Declaration of consent

The documentation of the proof can be done in electronic format. In yve you can choose the option 'Show consent form' in the questionnaire. Then the consent form described under "Account -> Consent" is displayed. You can adjust the explanation by clicking on the text of the explanation in the questionnaire. Please enter your contact information for privacy.

There are a total of 5 fields that you can use, depending on how detailed you want to query. The fields can be inserted via the 'Merge Tag' button (only once each time), they appear in the detail report ('Event -> Report -> Detail Report'):

- DSGVO / GDPR: this field is intended for the GDPR consent
- Contact by Email: if you request special contact channels, use this field for email contact
- Contact by Phone: If you request special contact channels, use this field for phone contact
- Contact by Print: if you request special contact channels, use this field for postal contact
- Compliance: if you have an additional compliance questions, use this field
- Subscribe: the contact data field 'subscribed' can be set if the consent should also apply to future invitations. This field cannot be a mandatory field according to GDPR.

You can have an e-mail log sent to you if the participant submits the questionnaire or signs up. To do this, enter the destination email address under 'Event -> E-Mails -> Sender -> Participants Log E-Mail'. The email contains all data of the participant, his anonymized IP address and the answers of his questionnaire. This e-mail can be saved as proof of the participant activity.

If you use the community, you can set under 'Event -> Edit Registration -> Community Members -> Participants with Opt in'. A question in the questionnaire will be activated, if the participant agrees to be listed in the community as a member. If this option is active, only members who have given this consent will be shown.

For public registrations, you should also select the option 'Record data, then verify email' for security, otherwise you will not be sure if the owner of the specified email has given your consent. You can activate under 'Event -> Websites -> Public Registration -> Terms' that consent to the terms will be requested at the time of the registration.

## Example declaration of consent

*"We would like to invite you via email and letter to our events. For this purpose we collect and process personal data about you. Your personal data will not be disclosed to third parties. Your personal data will not be stored longer than necessary to achieve the aforementioned purposes. To process your data we use the online service yve event tool from the service provider Buckow Enterprise Solutions GmbH (see privacy policy <https://www.yve-tool.de/en/privacy>). All data is secured against loss, destruction, access, modification and dissemination through technical and organizational measures.*

*The processing of your personal data for the aforementioned purpose is based on your consent. You have the right at any time to revoke this consent or to object to the processing. You have the right at any time to obtain information about your personal data, the right to rectify or delete them, the right to limit their processing and the right to transfer data. To contact us regarding privacy, you are welcome to contact us using the contact information below:*

*<Contact for data protection>*

*I agree that my personal information will be used for this purpose."*

## 8.6 Data protection processes

You need to set up processes that allow you to safeguard all rights of those affected.

These are as follows:

*Duty to provide information (privacy policy)*

To do this, insert your privacy policy as text or link to the event website and questionnaire.

*Obtain consent for data processing*

In yve you can choose the option 'Show terms' in the questionnaire (see above).

*Provide information about the data processing*

This is described in the privacy policy, and is visible in the participant's profile (only with Navbar turned on). The person concerned can directly contact you with a question. You can filter the master data via 'Contacts' and create a 'Contact Details' report. You can view the events for the contact via the 'Contacts Events' report and then view the participant's data in the events via the respective participant detail reports. Check in logs can be seen under 'Check in reports', email logs under 'Email History', print logs under 'Print History'.

*Correct the data by those affected*

The affected person can correct his profile himself (only with Navbar switched on) and you can change his data via 'Contacts'.

*Delete the data*

We do not have an automatic feature built-in because you have to decide whether to erase the data or if there are more important reasons than consent (see above) to keep the data. The person concerned can contact you directly. You can then delete his data via, Contacts -> <Name of contact> '.

If you want to delete all participant data in yve, you can do this with a delete import (see user manual). Additionally, events have attendee logs that can be deleted if you delete the event. If you copy the event before deleting it, the setup will remain in the copy without participant data.

yve creates a complete backup of the database every 3 hours, these backups are stored for 30 days. After that, these backups will be automatically deleted. yve creates a backup of all uploaded images and documents once a day. After 7 days, these backups are automatically deleted.

*Restrict the processing of the data*

You can put an 'unsubscribe' link in your emails with the merge tag 'Contact unsubscribe' in yve. If this link is clicked, the browser opens and a confirmation is requested. If the confirmation button is clicked, yve automatically blocks the email address of the affected contact, so that you can no longer send active emails to him. **Caution:** Only this contact will be blocked, if another contact has the same email it will not be blocked on the other contact.

Under 'Event -> Websites -> unsubscribe' you can change the text for the confirmation and the page afterwards. You can change the confirmation button under 'Event -> Websites -> Button Text & Color'. You can also set or cancel this block manually via, Contacts -> <Name of contact> -> Email -> Unsubscribed at '.

#### *Data portability*

You can find the contact under Contacts and create an Excel report with its data via 'Contacts -> Reports'.

#### *Accept cancellation of consent to data processing*

In yve you can choose the option 'Show consent form' in the questionnaire (see above). The affected person can withhold consent by deselecting the checkbox. The person concerned can also contact you directly and make the change under 'Event -> Participants -> Questionnaire'.

Within the framework of the GDPR further measures, such as create a list of processing activities, commit employees to data protection and, if necessary, appoint a data protection officer. We have here limited to the essential measures for the use of yve, our list and example makes no claim to completeness and is without guarantee. If necessary, please contact your data protection officer if you have ordered one or the responsible supervisory authority or your national data protection officer in order to coordinate your data protection procedure.

## 9 Testing

### 9.1 Preview event website

#### Preview the event website

You will see a preview of the event website under 'Event Dashboard -> Websites -> Preview -> Event Website'.

You will automatically be logged in as a test contact with your users data.

#### Preview the public page

You will see a preview of the public website under 'Event Dashboard -> Websites -> Preview -> Public Page'.

You can then register as a new contact.

#### Preview emails

You will see a preview of the emails when you create an email campaign (before you send it).

### 9.2 End-to-End Test

#### Test end-to-end

Test all steps of registration as a participant. The best way to test the event website is to send an invitation to the test participant (see Send invitations) and then click on the registration button in the invitation. Then look at all the tabs, click on all links and finally on the login button. Answer all questions, perhaps leave the mandatory fields at the first time to see the reaction of the system. Verify that you have received a commitment or cancellation email and that they look as they had planned.

Then check that they can see the response as an administrator under Event Dashboard and let yve give you a detail report and summary under 'Event Dashboard -> Reports'.

#### Test your improvements

It is very likely that you noticed things when you were testing them, which they would like to have differently. Make the changes and start a new test. You will go through this loop several times, which is normal. It is important that you have tested all the changes.

#### Go live!

If you have tested all the emails and the website, answered the questionnaire and everything looks as they want, you are ready to send the invitations.

### 9.3 Testing tips

- All functions and use cases would be too expensive to test, keep to the main process of logging in and test it once
- Look at your website and emails on a smartphone, 20-30% of the participants see your page only
- Also send invitations to your orga team, more eyes see more
- Show your web page to an unprepared colleague for 5 seconds and ask him what it is about. Some participants only invest so much time in their pages and should still know what to do
- Do not force your participants to think - every step and question should be self-explanatory. Now give your colleague enough time to get around and let him say aloud what he thinks. Maybe he can give you a valuable clue.

## 10 Participant reports

### 10.1 Create reports about participants

#### Create reports about participants

You can create various predefined reports with yve via 'participant reports' or define your custom report:

- **Predefined reports**
  - **Short report:** only includes participants with the most important contact data and the answers of the questions. Ideal for the orga team on site or for hotel bookings.
  - **Detailed report:** contains all relevant participant data and all answers to the questions. Format is xls, each participant is one line. Ideal for evaluating your event as all data are included. Rows with changes since one day before the query are highlighted in yellow. The login URL, login name, and the machine-generated password are also included, so that you can use this data to create email messages with your own email tool or to print a print containing this data.
  - **Accepted participant list:** creates a pdf document with all accepted participants (name, first name, company).
  - **Accepted participant list with pictures:** creates a pdf document with all accepted participants (name, first name, company) and the profile picture.
  - **Signature list for participants:** creates a pdf document of the participants with the most important contact data and a field for the signature. Ideal for events where the participants have to confirm their participation by signing it (for example, for training). The header of the report can be edited via 'Event Dashboard -> Printing -> Signature List Header'.
  - **Summary graph:** Each question that can be evaluated (radio button, checkbox and number field) is added together by yve and listed according to the available options and displayed graphically with a bar graph. Format is pdf. Ideal for a visually appealing evaluation.
  - **Summary text:** Each question that can be evaluated (radio button, checkbox and number field) is added together by yve and listed according to the available options. Format is pdf. Ideal to get a quick overview.
  - **Summary with names:** Like the summary text, only the participants who have chosen this option are listed for each option. Format is pdf. Ideal for workshop participant lists.
  - **Check-in report short:** Excel with a log entry for each check-in process: ticket ID, role (participant / companion#), check-in time stamp (UTC) or check-out time stamp (UTC), important contact data (name, email, telephone, companion fields)
  - **Admission detail report:** Excel with a log entry for each check-in process: ticket ID, role (participant / companion #), check-in time stamp (UTC) or check-out time stamp (UTC), detailed contact data (name, email, telephone, company, companion fields)
- **Custom reports**
  - You can create your own report via 'Create / Change / Delete Reports'. Select the fields you want and set the order.

In addition, they can also create an Excel report under 'Contacts -> Reports', which lists all your contacts with their events. The report will use all the filters you have set with 'Contacts -> Filters'.

### 10.2 Evaluation of the reports

#### Evaluation of the reports

The detail report contains all the data you need for an evaluation. These include

- Master data: the most important contact master data (name, email, company, ...) including identifiers are included
- IDs: the yve\_id, invitation\_id, customer\_number are included
- Status: the most important states are included (responded at, email status (bounces), delegated, checked in, ...)
- Companions: all fields to the escorts are included
- Time stamp: the most important times are included, all time stamps are in UTC (universal time):
  - contact created at - is set when the contact is created
  - invitation created at - will be set if a registration / invitation for the contact for this event has been created
  - responded at - every time the participant submits the questionnaire
  - updated at - is set by any update (also email status and activities of the administrator)

- canceled at - becomes law if a commitment is made to cancel
  - delegated at - is set when a participant delegates
  - checked in at - is set in at the first check in
  - checked in out - is set in at the first check out
- Login data: the login data of the participants
- Answers: the participants' answers to all questions

## 11 Manage check in

### 11.1 Preparation for the check in

#### Check in with tickets

In order to be able to check in with tickets, you must have previously sent a ticket with QR code to your participants (see article 'Create Emails').

#### Technical requirements

yve does not require a hardware scanner, you can scan the tickets with your smartphone or tablet.

To enter you need a **QR Code Scanner app** on your smartphone (iphone, android,...) or tablet (ipad, android, ...). You can use any QR scanner that recognizes a URL and can open it automatically. Please do not use the cell phone camera, otherwise you will have to click on the link every time.

We recommend the following free apps:

- **Iphone:** 'QR Scanner - Fast Scan' by Sabrina Holzer. In this app you can set under 'Settings - Ask before URL opened' that a URL is opened immediately. The QR Scanner automatically opens Safari, you can return to the scanner by clicking on 'QR Scanner...' at the top left.
- **Andoid:** 'QR Scanner' by QR Scan Team. Please select 'Open URL immediately' under Settings. The QR Scanner automatically opens your browser, you can return to the scanner by clicking on '<' at the bottom right

**Important:** The QR Code Scanner must be able to save a **cookie** from yve. You must therefore **not have the 'Private Surfing' mode activated** on your mobile phone.

You also need an existing **internet connection**. Be careful: at large events, your local cell phone distribution cell may become overloaded if all participants start using their cell phones.

#### User roles for the check in

All users roles can do the check in. We recommend you give the role 'Check in' for a user that does the check in, then this user can only be in the check in area of yve - the administration pages are blocked. This is especially useful when people are performing the check in who should not have access to the administration area.

### Preparation for the check in

The following steps are necessary for you to start with the inlet:

- Set the registration status to the 'Check In' under 'Event Dashboard -> Registration'.
- Registration is only possible if the checkbox 'Allow registration and replies during entry' is checked under 'Event->Edit registration'
- Then click on 'Event Dashboard -> Check in' to go to the check in page.
- There you will find an administration QR code, which you can read in and then log on with your user data.
- This turns the smartphone on for check in for 4 hours, and you get the Check In Screen when reading the Ticket QR Codes. **Caution:** you are not allowed to close the browser, otherwise your admin code will be deleted.

If after a ticket scan you do not see the check-in page but the event website, then your cell phone does not have the admin cookie. Please log in again (see above) and check that the event is set to 'Check In'.

### 11.2 Check in participants

#### Scan Tickets

If you read the ticket QR code without being logged on as an administrator, the event website for the participant opens. This can also be done by the participant and facilitates access to the event website. Only when you activate your smartphone to the check in, the dialog to check in is displayed when you scan the ticket.

### Check-in:

To check in the participant, you scan his ticket. They then see his status (announced, canceled, open) and see his name. If the participant has announced, they will see a '+' next to his name. Press the '+' and the participant is checked in, which they can see in the upper left of the black number and the 'Ok' next to his name.

Alternatively, you can search the participant by name, then click on 'check-in' and do a manual check-in.

If you tick the checkbox for 'Instant Checkin at TicketScan' under 'Event Dashboard - Registration', a participant and his / her companion will be checked in immediately when you scan his ticket and he / she has announced.

### Check-out:

You can also check it out by clicking on the 'x' next to its name.

### Check-in log:

Every check-in and check-out process for participants and companions is logged with the time and contact details in the check-in report.

**Caution:** the check in can only be checked in if the participant has the status 'Approved'. Open or canceled can not be checked in. To do this, you must log into the event as an administrator and change the status under Participants. Here you can also check in. Usually this is done at a separate hospitality desk with a laptop. You can also set a check **'Allow check-in of participants that have not accepted'** in 'Event Dashboard -> Registration', then you can also check in tickets of participant who did not accept.

With **'Show walk-in counter for entry'** you can display an entry counter that you can use to check in participants who are not listed as a contact. Only the number of admissions will be increased.

With **'Show questionnaire results upon entry'** you can display the questionnaire with the participant's answers after scanning under the participant's name.

With **'Allow registration and responses during entry'**, participants can continue to accept if registration has been set from 'Check In'.

## Assign seating and VIP status

If you also need a seating assignment for the check in, you can create it for each participant by clicking on the black entry number for the participant and entering the table as an entry comment. This comment is displayed when scanning the ticket below the names. You can also assign the entry comment field via Participants -> Upload List when you fill in the 'checkin\_comment' column. The entry comment field may be used for each comment, e.g. To mark a participant as a VIP.

You can show the results of the questionnaire on check in by selecting the check mark under 'Event-> Registration' 'Show survey results at check in'.

## Forgotten ticket

If a participant has not been able to print his ticket or open it on a smartphone, they can search for it on the Check In page and manually check in by clicking on the black '0 + 0' and then checking in with the '+'.

## Create nametags

You can create a name tag for each participant by designing the text at: 'Event Dashboard-> Printing -> Name Tag'.

When you have finished the template, you can select the participants under Print Create and the name tags can be sent as a pdf file. You can choose whether 1 name plate is printed per page or 10.

### 11.3 Check in tips

- Expect that 10-30% of participants do not have to bring a ticket
- Print administrations QR code for quick access



- Print your participant list on paper as a backup, if the Internet is not working
- Avoid printing on the spot, this may take too long and the printer may fail
- Print badges before check in, if necessary in envelopes with names above links, then in card boxes with name register
- Keep the check in short, no longer than 10-20 seconds. Otherwise you have queues at big events
- Use multiple check-in stations, one station can process between 50-200 persons for an event depending on the check-in duration (10-20 seconds) and the time window for check-in (15-30 minutes)
- Ensure a stable infrastructure with WLAN, the telephone can be quickly overloaded at large events
- Do not forget to press '+' after scanning the ticket, then the participant is checked in
- If possible, set up a hospitality desk with a desktop or laptop in order to be able to handle all special cases more easily (for example, the participant has canceled and wants to participate anyway)

## 12 Manage users

### 12.1 Users and contacts

#### Create user

You can create up to 100 users in yve for your account. To do this, click on 'User -> new' enter the personal data and enter an abbreviation and the password. For users, the login is performed via the email, so each user must have a valid email, which is unique in your account.

#### Permissions in yve

Yve strictly separates between the following person types:

- **Users:** organize the events, set the event, and manage the participant process
- **Contacts:** can be assigned as participants to an event

For security reasons, these two types can not access the contents of the other person. For this reason, you must first create a test contact themselves in order to test an event as a participant.

The login masks are also different (replace your account name with your account name):

- **Users:** log in via <https://accountname.yve-tool.de>
- **Contacts:** log in via <https://accountname.yve-tool.de/login>

### 12.2 Nutzer Rollen

	Account Admin	Admin	Import Admin	Manager	User	Editor	Check in
Check in	✓	✓	✓	✓	✓	✓	✓
Create / edit events	✓	✓	✓	✓	✓	✓	
Send emails	✓	✓	✓	✓	✓		
Delete events	✓	✓	✓	✓			
Finance reports	✓	✓	✓	✓			
Import contacts	✓	✓	✓				
Manage groups	✓	✓					
Manage user	✓	✓					
Delete account	✓						

### 12.3 Notifications

#### Notifications

For each user, you can decide which notifications they should receive:

- **Emails for tasks:** the user receives an email every day if he has 'only due' tasks, 'none' or 'always'
- **Calendar entries for events:** the user receives a ics calendar entry for 'all', 'own' or 'none' events
- **Emails for limits:** the user gets emails as soon as a limit (max number of subscribers, ...) is reached for 'all', 'own' or 'none' events. If none, one checks whether at least one user receives the email. If not, the account administrator will receive the email even if he has set 'none'.
- **Emails for pending contact deletion:** On the morning of the day of contact deletion, you will receive an email with the total number of accounts that will be deleted that day in the evening.

'Own' events are events where the user is registered with 'Events-> Contacts-> Manager' as manager. This option is only available if you have selected under Account-> Default view-> All.

## 12.4 Groups of users

### Groups of users

With groups, you can split your account for specific users (e.g., a department). As an administrator you can create a new group under 'Users -> Groups'. Each user can be assigned to an existing group under 'User -> Edit'.

All members of a group can only see events created in this group - events without a group or another group are no longer displayed. If a user has access to an event, he can see all the objects in the event. Users without group assignment can see all events.

The only exception are administrators who can always see all events, tasks and contacts, regardless of which group they belong to.

The group assignment of events, tasks and contacts always takes place automatically when you create them. Administrators can change the group of an element.

Under 'Groups-> Show nil groups', you can decide whether elements without a group are visible to users with group assignment.

Under 'Groups-> Groups valid for', you can decide whether groups are valid for events or also for contacts.

## 12.5 Single Sign On

With yve Single Sign On (SSO) you can use your Microsoft company account to log in to yve as a user. yve uses OAuth2.0 technology for SSO to log in via your Microsoft Azure account.

With SSO, users only need to log in once with their company account. You get full control over user access to yve via your Azure company account. If you have 2-factor authentication in your company account, this will also be used when logging in to yve.

The following steps are necessary for setup:

- Your IT creates a company app 'yve-tool' in your company Azure, which supplies the app ID.
- Your IT then creates a 'secret' for the yve app, which provides the secret key.
- Your IT creates the 'openid, profile and email' permissions for the yve app.
- Your IT sets the callback URI for the yve app (the accountname is your subdomain in yve):
  - [https://accountname.yve-tool.de/users/auth/azure\\_activedirectory\\_v2/callback](https://accountname.yve-tool.de/users/auth/azure_activedirectory_v2/callback)
- Your IT creates users for the yve app who should have access.
- You also create these users in your yve account, as they are not created automatically.
- Your IT will provide us with the following information at [support@yve-tool.de](mailto:support@yve-tool.de):
  - client\_id (the ID of the yve app)
  - client\_secret (the secret key)
  - tenant\_id (your Azure account ID)
- We will then set up access to yve for you. For this we can allow both login types (SSO + login) or only SSO

SSO is only available for yve users, not for contacts.

## 13 Manage account

### 13.1 Account settings

#### Account Settings

You can access the account settings via 'Account'. Only administrators can see this area. You can make the following settings:

- **Account data:** here you can change the name of your account (displayed as a tab name in the browser). **Caution:** when you change the domain of your account, all invitations that you currently have active will no longer lead to the correct page. Do not change this option if possible. Please ensure that you comply with trademark restrictions, as your domain name is already protected by trademark rights in the URL. The account administrator is responsible for this.
- **Subscription:** here you can change your yve subscription. Upgrades are immediately effective, downgrades only after the current period has elapsed.
- **Invoice address:** this is the address for your yve invoice
- **Account Settings:**
  - VAT: Default value for VAT, can be changed per cost point
  - Language: Default for the language, can be changed by the setting 'Language' in the navigation individually or for contacts as a language
  - Currency: Caution: the currency is a pure name, yve does not convert prices.
  - Daily emails: sent based on your open tasks
  - Default view: you can choose whether they want to see only field for participant management or all yve functions (including budget and tasks).
- **PDF Layout:** Header and footer for documents created by yve
- **Text defaults:** Defaults for documents which can then be adapted in the individual event
- **Welcome text:** Text next to the login form for participants. Here you can also change the colors of the login page.
- **Web Logo / Favicon:** the logo in the navigation of the event website and your favicon.
- **Colors for participant profile:** Here you can set the colors for the subscriber profile
- **Custom fields contacts:** Here you can change the name of the 6 self-defined fields for contacts
- **Custom fonts:** You can upload your own fonts, which are automatically displayed in the editor as a font selection. Specify fallbacks and upload the font in .woff format. Custom fonts are only available in websites and PDFs, not in emails.

### 13.2 Deleting an account

#### Deleting an account

As an account administrator, you can delete all your account data using 'delete'. We only keep data to manage your contract. Your yve subscription is automatically terminated after account deletion after expiry of the current period.

**Caution:** this step can not be undone, your data will be lost forever.

## 14 System integration (API)

### 14.1 API Interface

#### API interface

With the yve REST API interface, your system can query, change and delete data in yve.

The query is made via an HTTPS POST call in JSON format.

Authentication takes place via the HTTP Authorization header, each user has their own API key, which you can find under 'User->(Name)->Password' in your yve account.

Further technical information can be found in the API documentation, which you can request from yve support.

### 14.2 API functions

You can call the following functions in the yve REST API:

<b>Contacts</b>	contacts/show	A single contact is read
	contacts/update	A single contact is updated
	contacts/create	A single contact is created
	contacts/destroy	A single contact is deleted
	contacts/list	Multiple contacts are read
	contacts/import	Multiple contacts are created or updated
	contacts/link_labels	Multiple contacts are linked to labels
	contacts/unlink_labels	Multiple contacts are unlinked from labels
<b>Labels</b>	labels/show	A single label is read
	labels/update	A single label is updated
	labels/create	A single label is created
	labels/destroy	A single label is deleted
	labels/list	Multiple labels are read
<b>Invitations</b>	Invitations/list	All invitations from a contact are read
<b>Events</b>	events/list	All events in an account are read

Further information about functions can be found in the API documentation, which you can request from yve support.

