Create Collaborate Manage

Integrate Access Analyze

eventuosity®

plan anything. plan for everything.

User Guide

eventuosity®
plan anything. plan for everything.

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Table of Contents

About *eventuosity®* 4

Login and Access 5

General Navigation, Home Screen and Task Bar 6
- Notification Control 8

Master Event Calendar and Snapshot View 10

Create and Manage Events 11
- Working With Templates 12
- Bulk Import of Events 14

Event Basics: What, When and Where 14
- What 14
- When 14
  - Project Dates 15
  - Event Dates 15
- Where 15

Event Management Modules 17
- People 17
  - Sync People From Online Contacts Databases 17
  - Import People From A File 18
  - Add People Manually 19
  - Custom People Data 20
  - Roles Indicators 21
  - Groups 22
  - Adding People To An Event 24
  - Roles 26
  - Custom Roles: Enterprise Master Users 27
  - Assigning Account-Wide Event Creators 27
  - Event Creators in Enterprise Accounts 29
- Tasks 30
- Budget and Expenses 35
- Schedule 38
  - Sync Schedules With Calendar or CRM Applications 41
- Resources 42
- Event Binder 45

Reporting and Analytics 49
- Reports Module 49
- Event and Summary Reports 51
- Snapshot View 52
- Dashboard 53

Inbox 54
- Mail 56
- Chat 56

Forms 57

Manage Basic Information Form Fields 58
Manage Custom Form Fields 58
Specify Form Name and Location 60
More Forms Options 60
View Form Information 63
Registrant Management 64

Additional Product Information and Support 67

Appendix A – Roles and Permissions 68

Appendix B – Importing Spreadsheets to Eventuosity 76
What Can You Import? 76
File Format - CSV 77
File Preparation: Events 77
File Preparation: People 78
File Preparation: Tasks 78
File Preparation: Schedule 79

Appendix C – Working with Salesforce.com 81

Appendix D – Integration: Marketo 82
Configuring "My Account" for Marketo Integration 82
Service Creation 83
Obtaining Client Details 85
Marketo REST API 86
Sharing Campaign and Event Data Between Marketo and Eventuosity 87
From Eventuosity to Marketo 87
From Marketo to Eventuosity 88
Connecting Eventuosity Forms to Marketo Leads Database 89

About *eventuosity®*

Eventuosity is a cloud-based, software-as-a-service (SaaS) application for event planning and management. It is the first event technology application to address the needs of event managers to ensure successful execution of event strategy.

Despite strong growth in the event technology sector, few solutions have attempted to look beyond attendee-facing capabilities such as registration/ticketing, promotion, and social engagement to address the needs of event professionals who are responsible for logistics, project management, staffing, budgeting, and the other functions necessary to keep programs on track and successfully accomplishing their objectives.

As a result, event managers often use between 5 and 7 different products to run their programs. Most common among them are e-mail, spreadsheets and calendar applications such as Microsoft Outlook.

Figure 1: Eventuosity is the first application to bridge the event technology gap

Eventuosity utilizes many elements of project management, scheduling and communication software but is unique in that it has been built specifically for an events workflow. Eventuosity eliminates manual processes and disconnected tools to:

- shorten planning time
- optimize resource utilization
- reduce costs
- provide 360° event views for better control and insight.

Furthermore, Eventuosity has been developed with the understanding that event planning may start in an office but much management activity takes place elsewhere. So Eventuosity is cloud-based and optimized for mobile usage.

Figure 2: Eventuosity is cloud-based so event professionals can work from their office, on the road or at their event venue

With Eventuosity, event managers can focus less on administrative work and more on the strategic aspects of their events such as lead generation and attendee experience that drive higher event ROI.

Login and Access

All Eventuosity users, regardless of their role in an event, are required to log in with an email address and password. Logging into the system provides the user with access to their profile and to all event data for which their privileges have been granted.

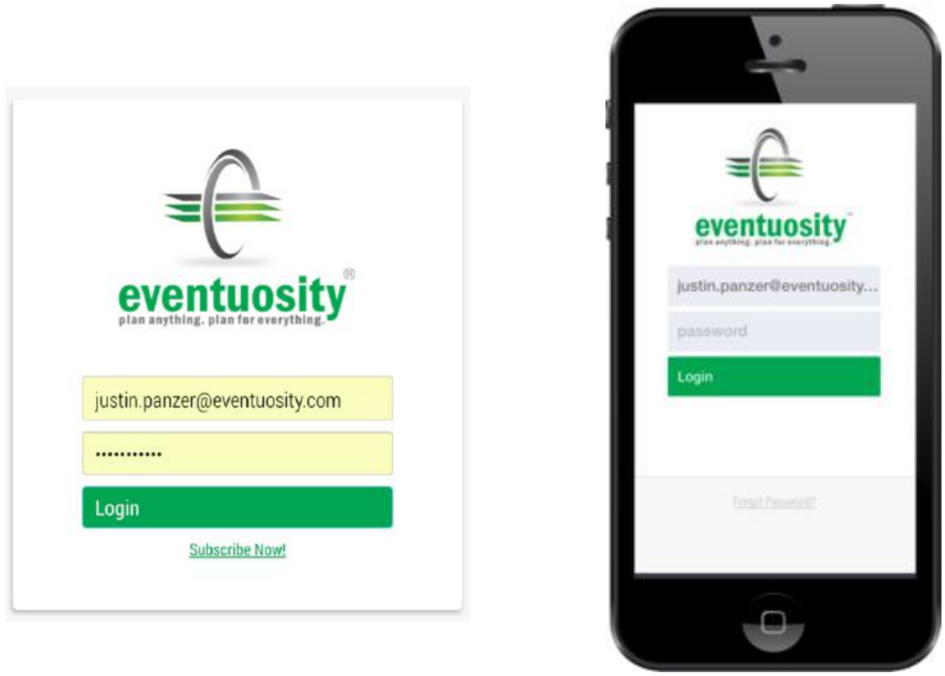


Figure 3: Users are required to log in using their email address and a password

General Navigation, Home Screen and Task Bar

When a user logs in, they are taken to their Eventuosity Home Screen. The Home Screen is the entry point into all other areas of the application and can always be accessed from the Home button on the Task Bar. The Task Bar is always available on the left side of the user's browser or mobile app window.

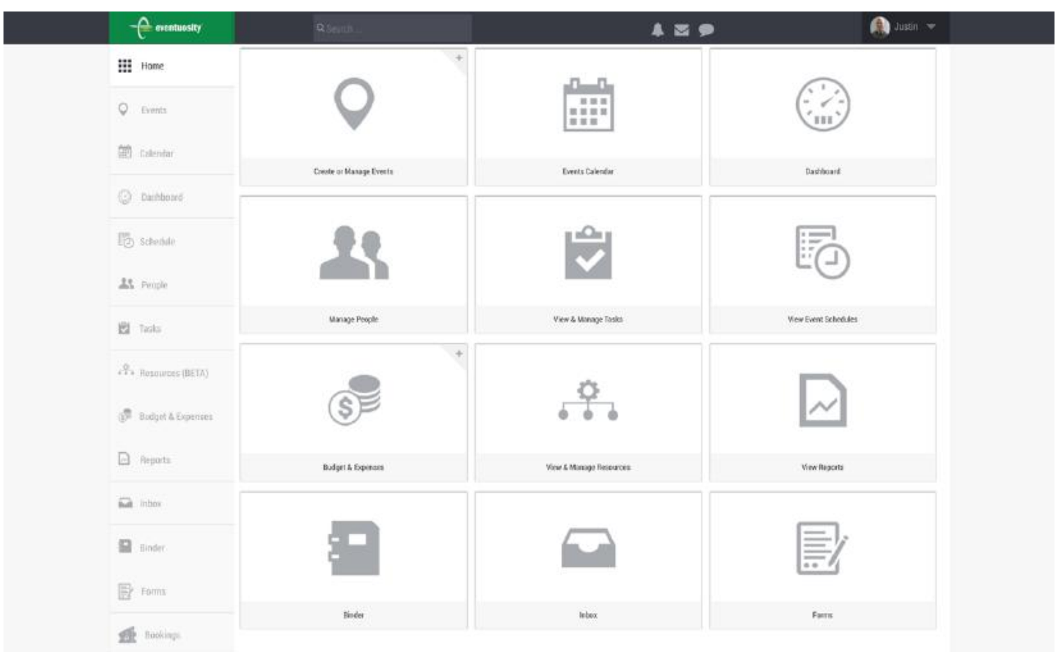


Figure 4: The Home Screen is the main entry point into Eventuosity

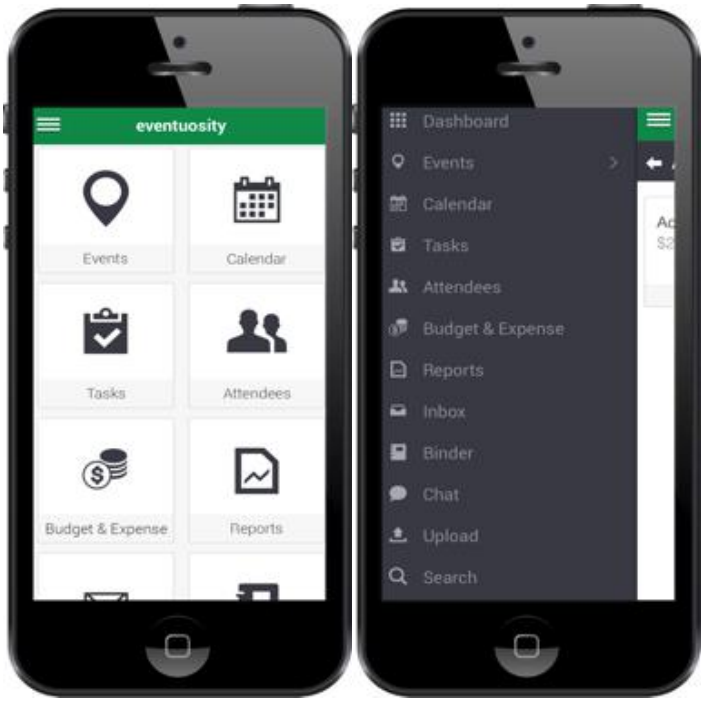


Figure 5: Home Screen and Task Bar navigation are available on the Eventuosity mobile apps

Users can choose to view each event and all associated data or a single event element (People, Budget, Tasks, Resources, etc.) for one or all events.

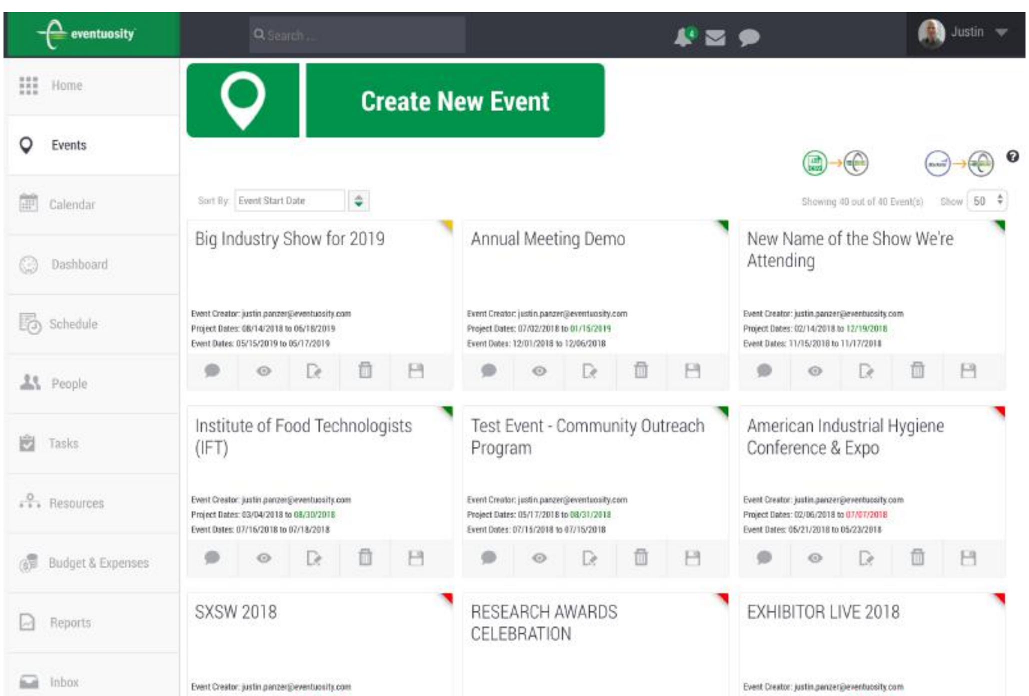


Figure 6: View an entire event or all events by module

Throughout Eventuosity, several icons can be seen that indicate functionality that is not event-specific. Availability of those icons/functions is role-dependent. Functions available in various Eventuosity locations are:

	Send a Mail or Chat message (more detail in Inbox)
	View
	Edit
	Duplicate (for Tasks or Resources)
	Delete
	Save As Template
	View associated Binder folder
	Export to calendar application
	Send a Reminder
	Mark Complete
	Reset to Incomplete

Notification Control

Throughout the Eventuosity Product Guide, references will be made to notifications that are sent to Attendees. Notifications are sent to inform event participants of assignments and status updates. Each section of an event from which notifications are triggered has an associated Notification Control. The Notification Control panel provides administrators with the option to continue sending notifications or to selectively turn them off (1). Timing for notifications that are kept on may then be specified by selecting one of three options.

- **Send on Assignment** (2)– The default setting for all notifications. When selected, this option triggers notifications to be sent immediately when an assignment is made by an administrative user.
- **Send After** (3) – Allows an administrator to set a fixed time delay after an assignment for notifications to be sent.
- **Send Manually** (4) – Holds all notifications while changes and updates are being made. An administrative user triggers a single notification with the latest data for any event element by clicking the Send button.

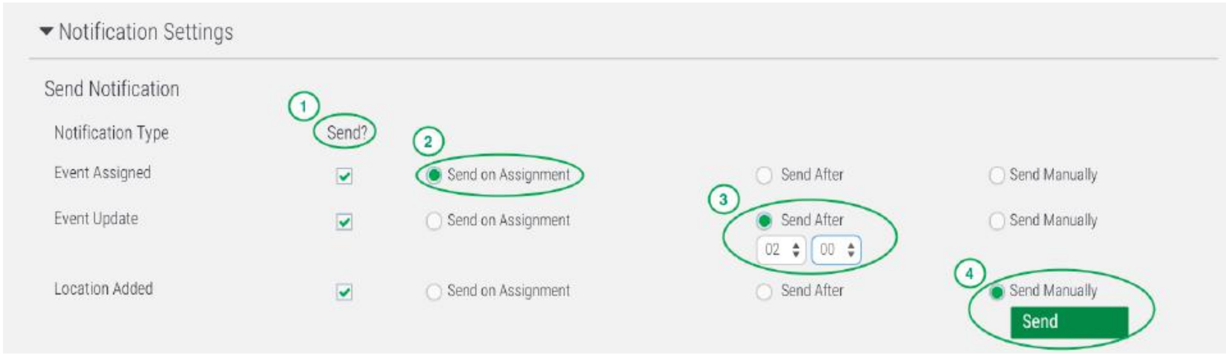


Figure 7: Notification Control Panel example

Notification receipts are indicated in the Eventuosity web and mobile applications by badges which specify the number of notifications received by a user. Indicators in the web application are shown in the Notification Center on the top menu bar.

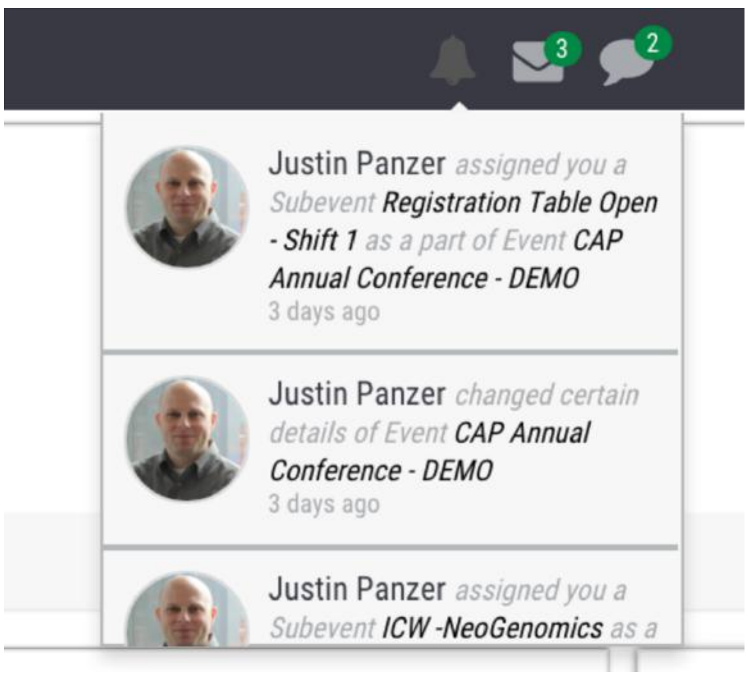


Figure 8: Notification Center in the Eventuosity web app indicates number of received notifications, mail messages, and chats. Clicking any notification in the dropdown opens the associated item.

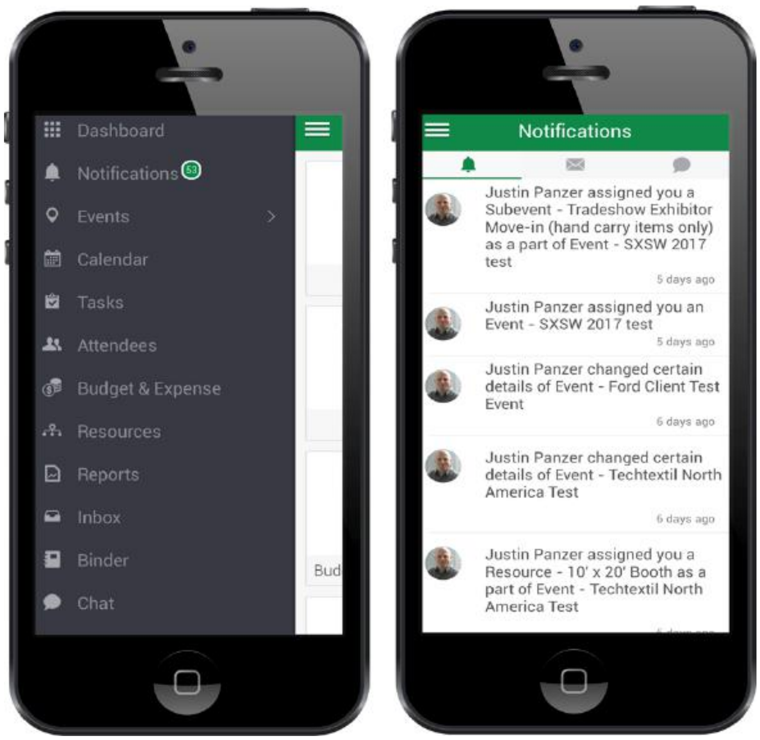


Figure 9: Assignment, Mail and Chat notifications are indicated in the Eventuosity mobile app Notification Center

Master Event Calendar and Snapshot View

All events created in Eventuosity are shown in the Master Calendar which can be accessed from the Home Screen or Task Bar. Each Master Calendar entry is color-coded based on the event category assigned by the event manager. This allows users to quickly determine what program types are scheduled in a given time period.

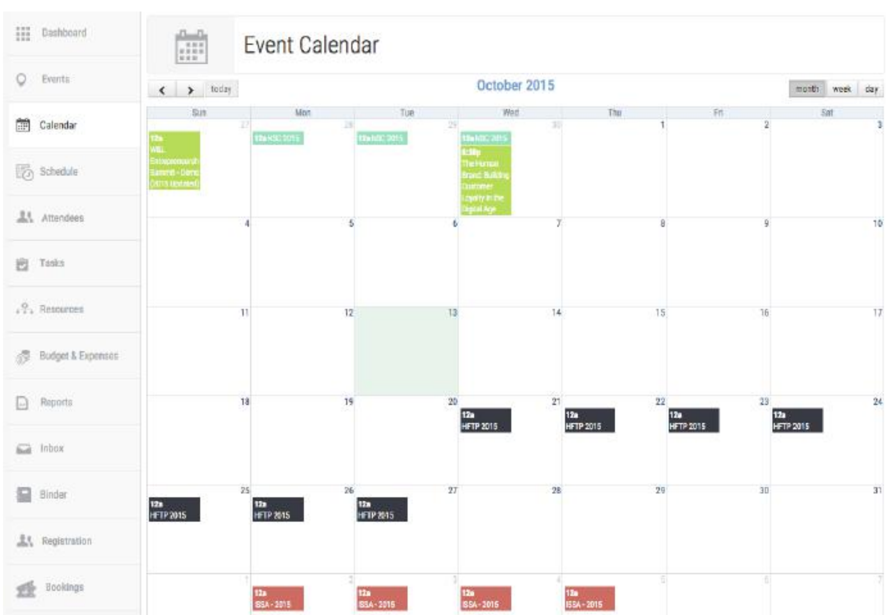


Figure 10: The Eventuosity Master Calendar shows all scheduled events by category

Clicking on any of the events in the Master Calendar, or clicking the View icon from the Create and Manage Events screen, opens the event Snapshot View. Snapshot View provides event organizers with a quick status update on their program which includes number of participants in each role, upcoming tasks, budget status and more.

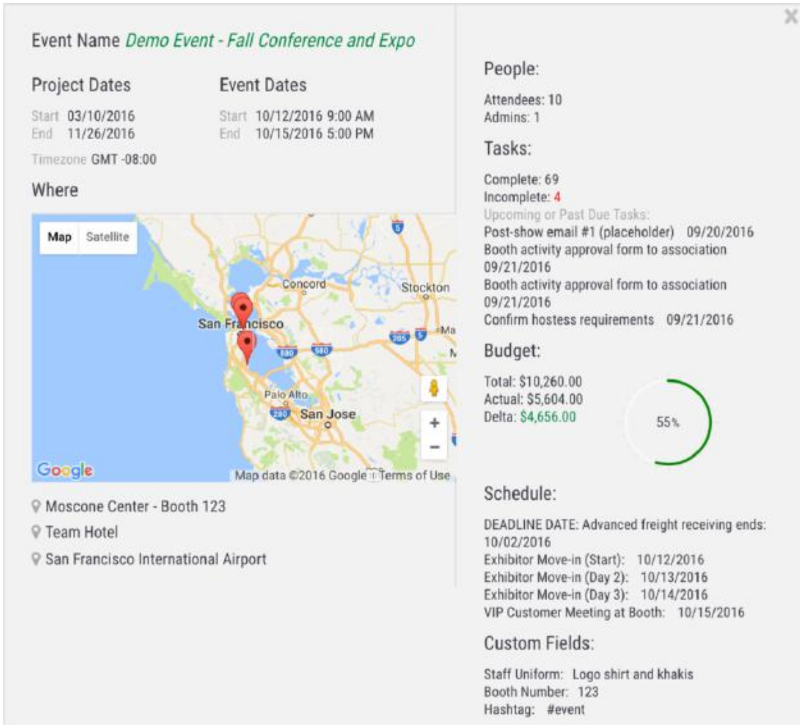


Figure 11: Snapshot View provides a quick status update for an event

Create and Manage Events

The Create and Manage Events module of Eventuosity gives the user access to all existing projects and allows creation of a new event project.

There are four ways to create new events.

1. Create a new event from scratch. The user builds all of the details of their event with no information pre-populated.
2. Create a new event from a previous event. The user can create a new event from any program they have done in the past. This is extremely useful for recurring events such as annual meetings or for common event types that follow a recurring workflow. Any event that a user creates from scratch can be used later to create a new event.
3. Create a new event from a template. Eventuosity provides several templates that give the user pre-defined tasks, sub-events, budget items, resources, and binder folders that experienced event planners suggest be used as the foundation for trade shows, sales meetings, group travel and more. Users can also create their own templates for later use.

4. Add events in bulk by importing from spreadsheets. This functionality is available to assist event managers in moving quickly from spreadsheets to Eventuosity by eliminating any need to re-enter data that may already exist in another location.

All events are 100% customizable no matter how they were created.

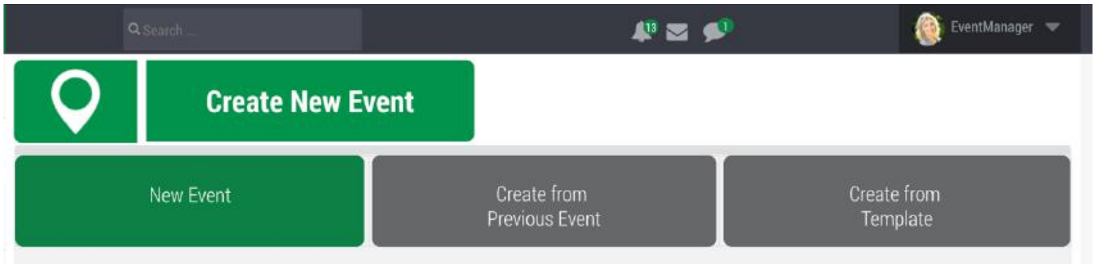


Figure 12: Create new events from scratch, from a previous event, or from an Eventuosity event template

Working With Templates

Eventuosity includes several templates to simplify new event creation. Both experienced and novice event planners will find templates to provide useful planning guidelines and to reduce data entry. Eventuosity's built-in template library incorporates project, task, and sub-event dates that are all based on the event start dates. Date dependencies can be re-used when creating an event from a template. Simply enter a start date for your new event, choose the option to use date dependencies, and click Create Event.

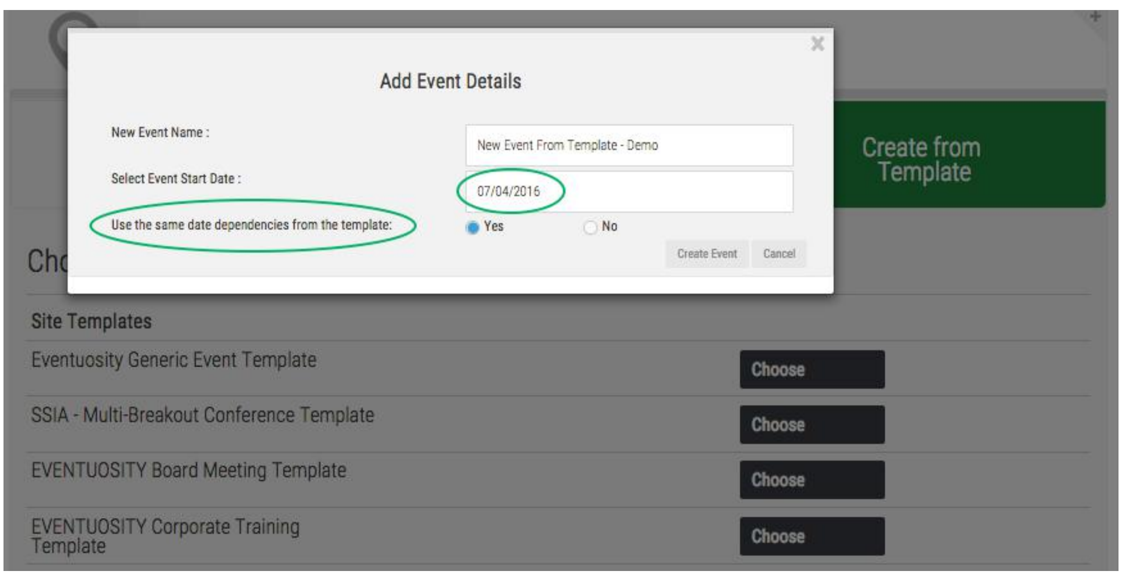


Figure 13: Create an event from a template with project, task and sub-event dates based on event start date

User-created templates are also available in Eventuosity. To create your own templates, build an event using any of the three event creation methods, click the Save As Template icon, and Save the template.

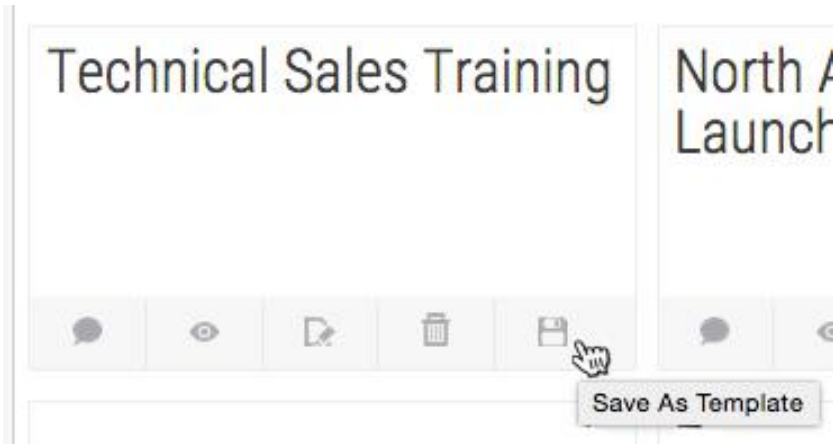


Figure 14: Save any event as a template for later use

Figure 15: User-created templates are available in the Eventuosity template library

To rename a saved template, simply click on the template title to open up the name editor. Click the green check box icon to save the new name.

Figure 16: Template names may be edited in the User Templates list

Bulk Import of Events

Many event organizers begin using Eventuosity after having managed events in spreadsheets for some time. Though spreadsheets are not very efficient for event management, they often hold quite a bit of event data that is needed when migrating to Eventuosity. For that reason, we offer users a tool to quickly import spreadsheet-based data into Eventuosity to create multiple events at once.

Importing events starts on the *Create or Manage Events* page of the Eventuosity web application. Click the CSV→ Eventuosity icon located on the top right of that page and follow the prompts to complete the import.

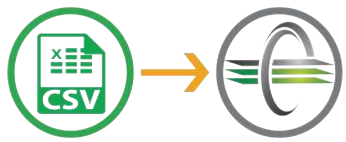


Figure 17: The CSV → Eventuosity icon on the Create or Manage Events page of the web application will start the process of importing multiple events from spreadsheets.

Sample spreadsheets are available on the Library page of the Eventuosity website along with other useful resources for preparing your spreadsheets for import. For step-by-step instructions on importing spreadsheet data throughout Eventuosity, please refer to <u>Appendix B</u> of this User Guide.

Event Basics: What, When and Where

Creating an event starts with basic information about it.

What

"What" includes an event category. Users can add a new category at any time or choose from the Category dropdown. The event must also be given a title.

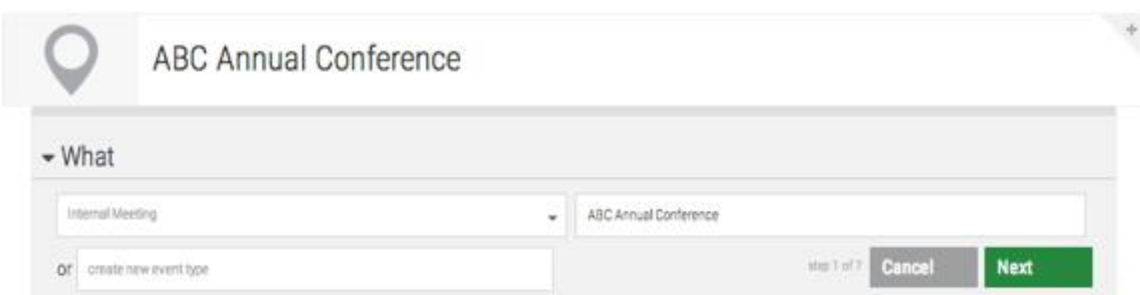


Figure 18: All events require a category and name in What

When

"When" is how the user creates the scope of their event project. There are two sets of dates associated with each event.

Project Dates

Set a start and end date to the project. For example, the start date may be the date of the first planning team meeting and the end date may be the date that the event manager plans to close the post-event tasks such as expense reporting. All sub-events, tasks and other parts of the event are constrained by these dates.

Event Dates

Event dates are the actual days on which the event will occur. This is a sub-set of the entire project. An example is the three days of a trade show as part of a year-long planning period for that show.

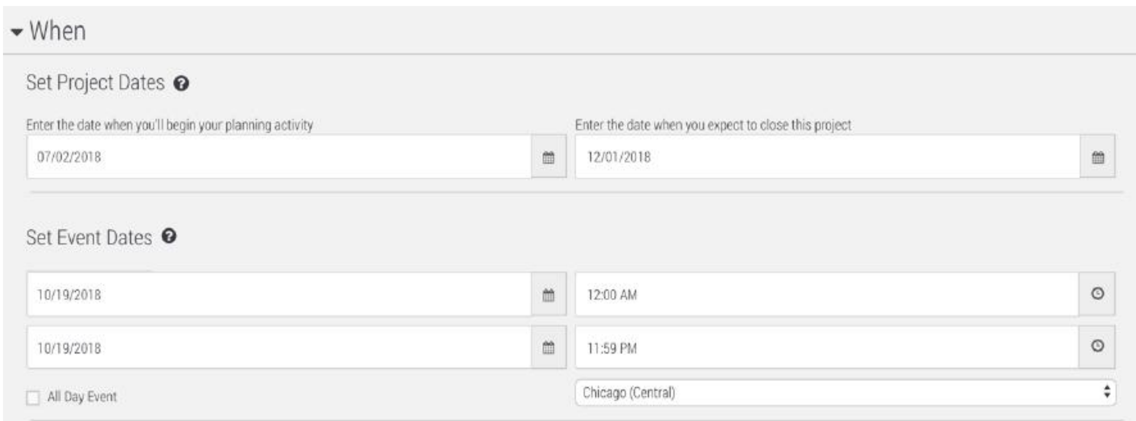


Figure 19: When provides the project scope for the event

Where

"Where" gives the event manager the ability to inform everyone associated with their program of any location that is associated with it. Eventuosity's Where section is integrated with Google Maps so users can add any location with a very simple search. Location name can be edited before saving to be something that is easy to remember. Previously used locations can be recalled quickly in the Search My Locations field.

There is no limit to the number of locations that can be added to an event. However, not all locations MUST be added here. Later, we will look at sub-events and how to attach alternate locations to them for places that may not be relevant to everyone in an event.

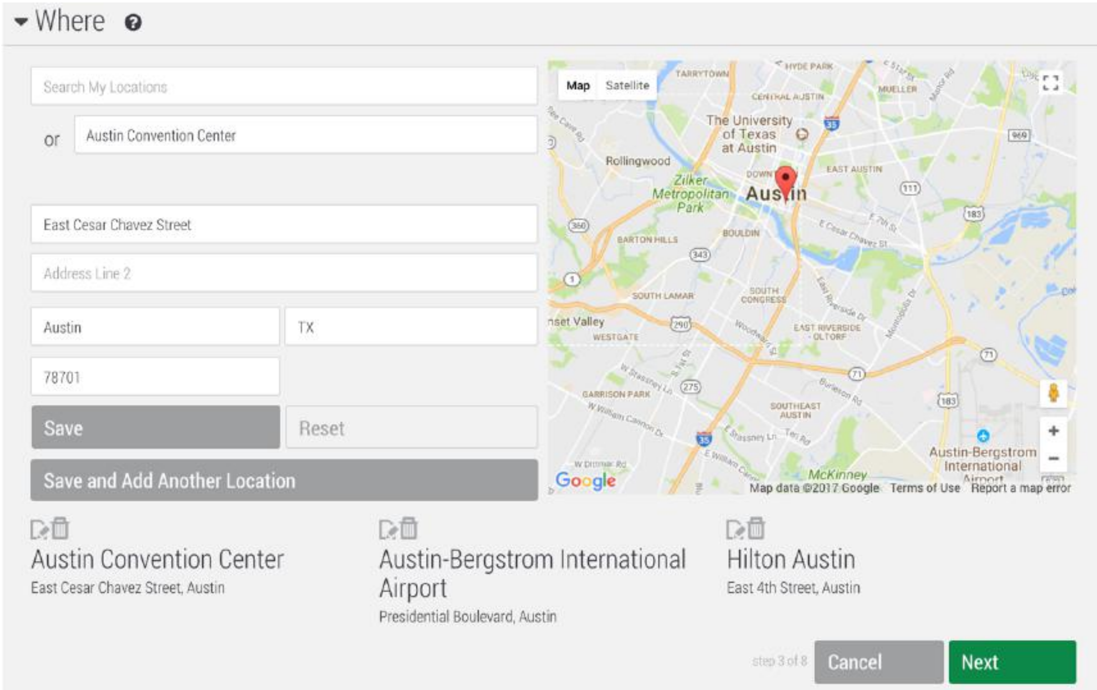


Figure 20: Google Maps integration provides location data for all event participants

All places added in Where or in sub-events are available in the Eventuosity iOS and Android mobile apps to give end users complete turn-by-turn directions (via Google Maps) to event locations.

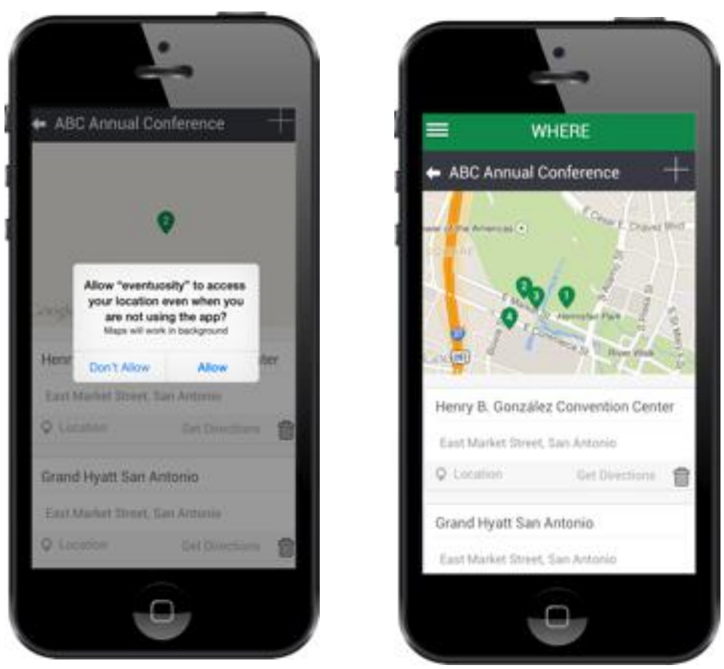


Figure 21: Event location data and turn-by-turn directions are available in iOS and Android mobile apps

Event Management Modules

The following Eventuosity modules are discussed in the order in which they appear under an event when opened by the user. Each of these application areas can be viewed and managed on their own as well.

People

In Eventuosity, contacts are called People and can be added to an event in several different roles.

Figure 22: All contacts added to Eventuosity are in the People Management area

People can be added to the user's database through a sync with cloud services such as Microsoft Outlook Online, Gmail, Salesforce.com, and iCal; import from standard file types such as .CSV or Microsoft Outlook's .VCF; a self-registration process (described later), bulk add with a variety of field mapping options, or manually by the event manager.

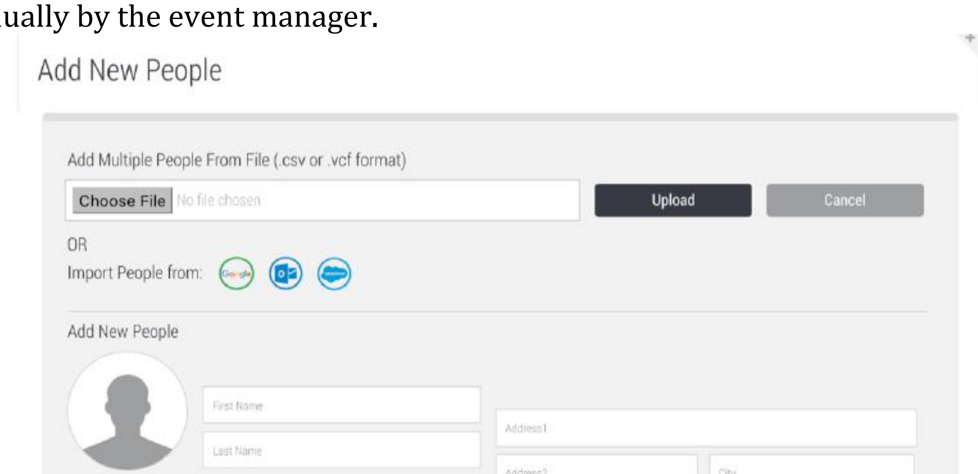


Figure 23: Add new People in the *Manage People* module via file upload or via sync with cloud-based services such as Microsoft Outlook, Salesforce.com, or Gmail.

Sync People From Online Contacts Databases

To import contact data from your email or CRM application to Eventuosity, click the logo icon of the service in which your existing contacts currently exist. A new window will open (varies by application) asking you to authorize Eventuosity to fetch your contact data. Enter the login credentials for the source application to complete the authorization.

Eventuosity will match the data being imported with data already in your Eventuosity People database to ensure that duplicate data is not made available for import.

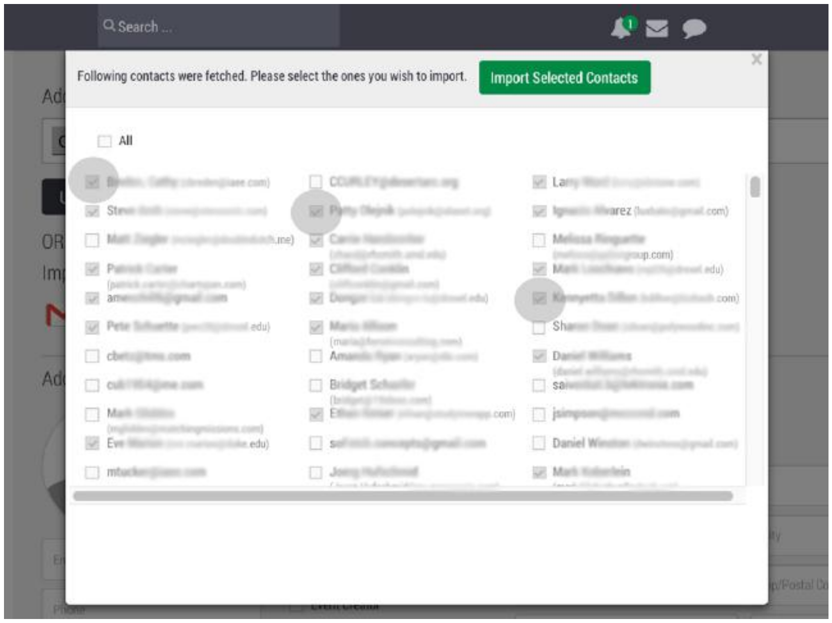


Figure 24: People data that has been previously imported into Eventuosity will not be synced.

You may then select the contacts you wish to import. Click the sync as often as you wish to ensure your Eventuosity People are always in sync with your contacts database.

Please note that due to the custom nature of many Salesforce.com implementations, the Eventuosity support team may need to provide assistance when performing your first sync. This may require access to your Salesforce.com sandbox. Please contact Eventuosity for support with Salesforce.com data sync.

Import People From A File

In cases where the data you wish to sync with Eventuosity is offline, or is in an application that is not currently supported by automated sync, you may import that data using a .CSV of Microsoft .VCF file (created when exporting MS Outlook contacts data).

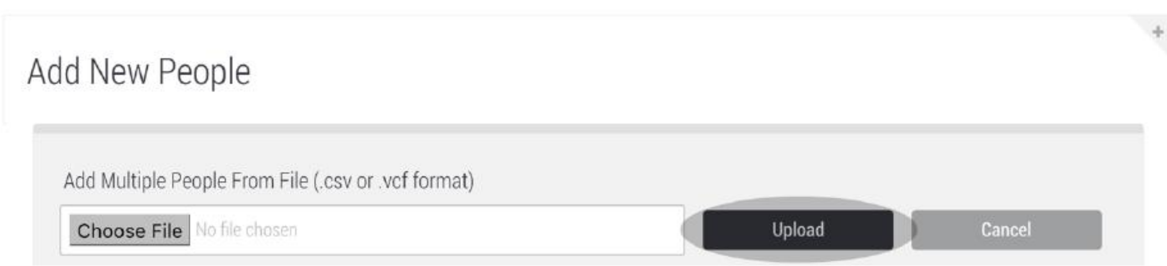


Figure 25: Click Upload to import People data from a file

A pop-up window will guide you through mapping your .CSV columns to Eventuosity data fields. For easiest .CSV import, visit eventuosity.com/library for a People import template.

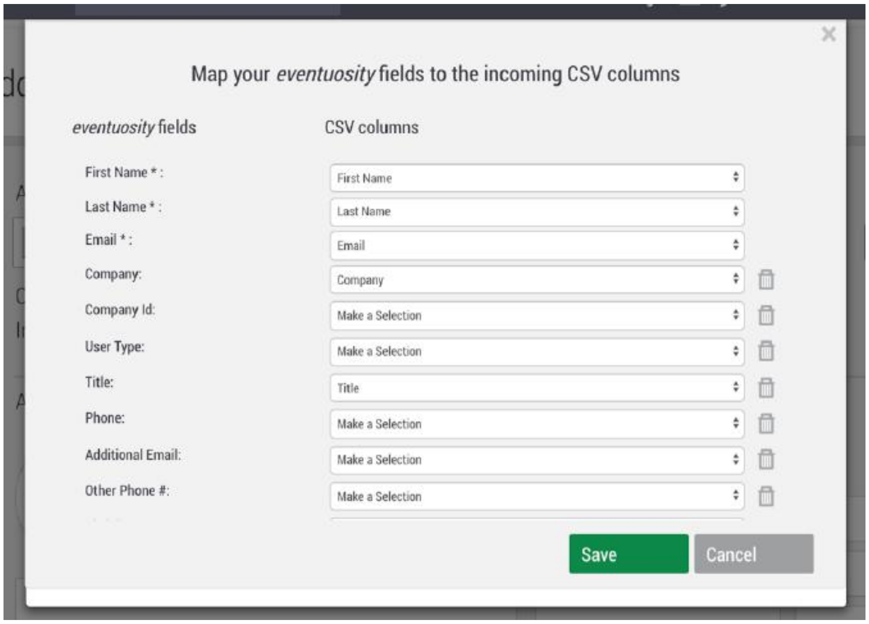


Figure 26: Map your .CSV column headers to Eventuosity data fields

Add People Manually

Manual additions can be completed under an event or in the Manage People module of Eventuosity.

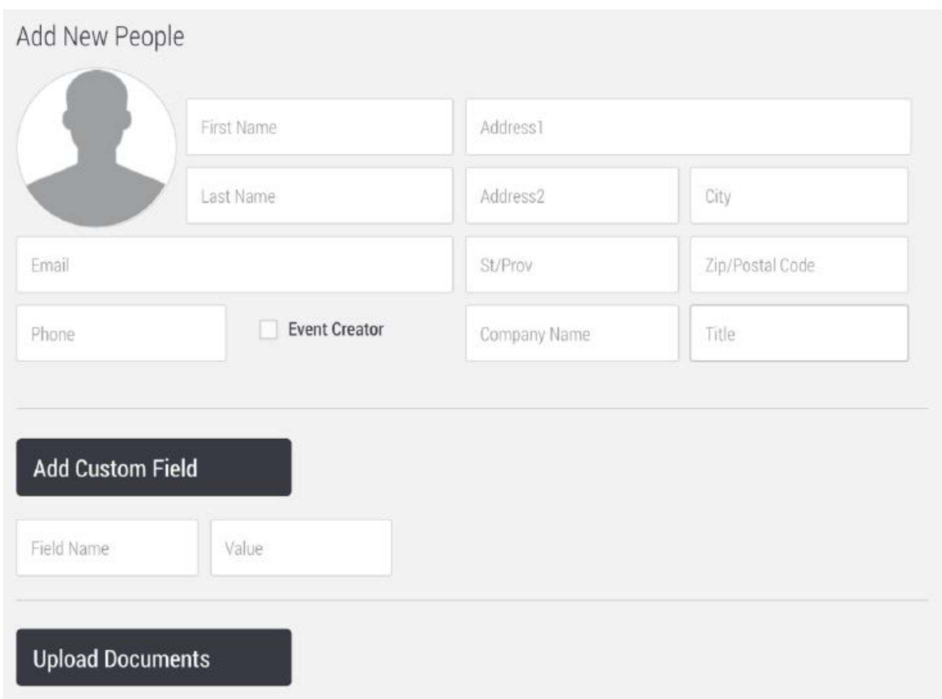


Figure 27: Create People manually when necessary

If you have added People manually in Eventuosity, you can sync that data back to your email and/or CRM applications. To do this, expand the All People section of the Manage People module, click the logo icon of the application to which you'll be sending your data, and follow the prompts to complete the export or sync.

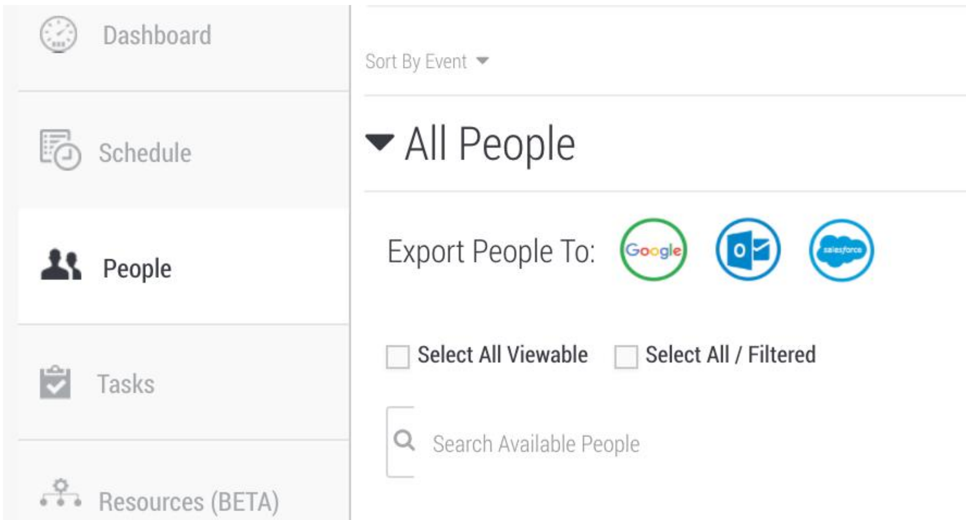
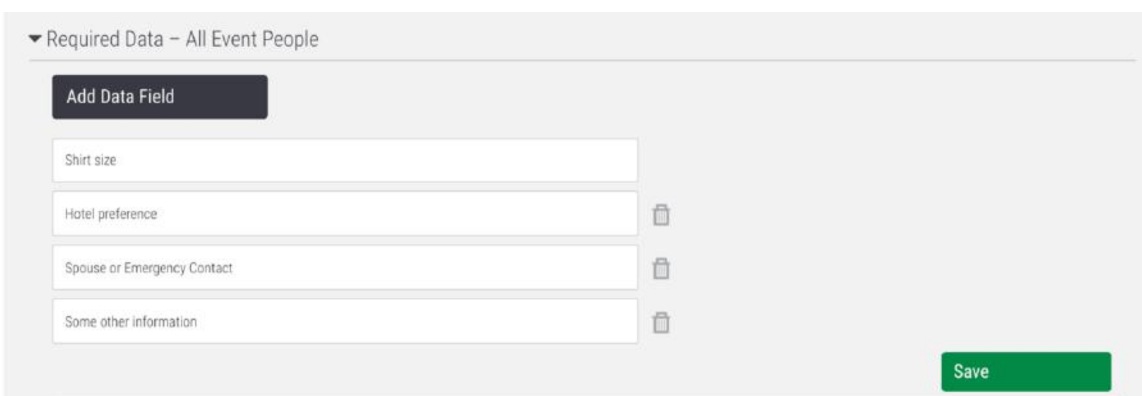


Figure 28: Send Eventuosity People data to an email or CRM application

Custom People Data

All people can have custom data associated with their profile either by themselves or by the Event Creator or Admin. Custom data is added simply by adding a field in the Person's profile. Custom fields can be added for one person or across all people in an event. An example of a custom field added across an event is a frequent traveler number that is going to be applied when an Event Manager reserves a hotel room block.



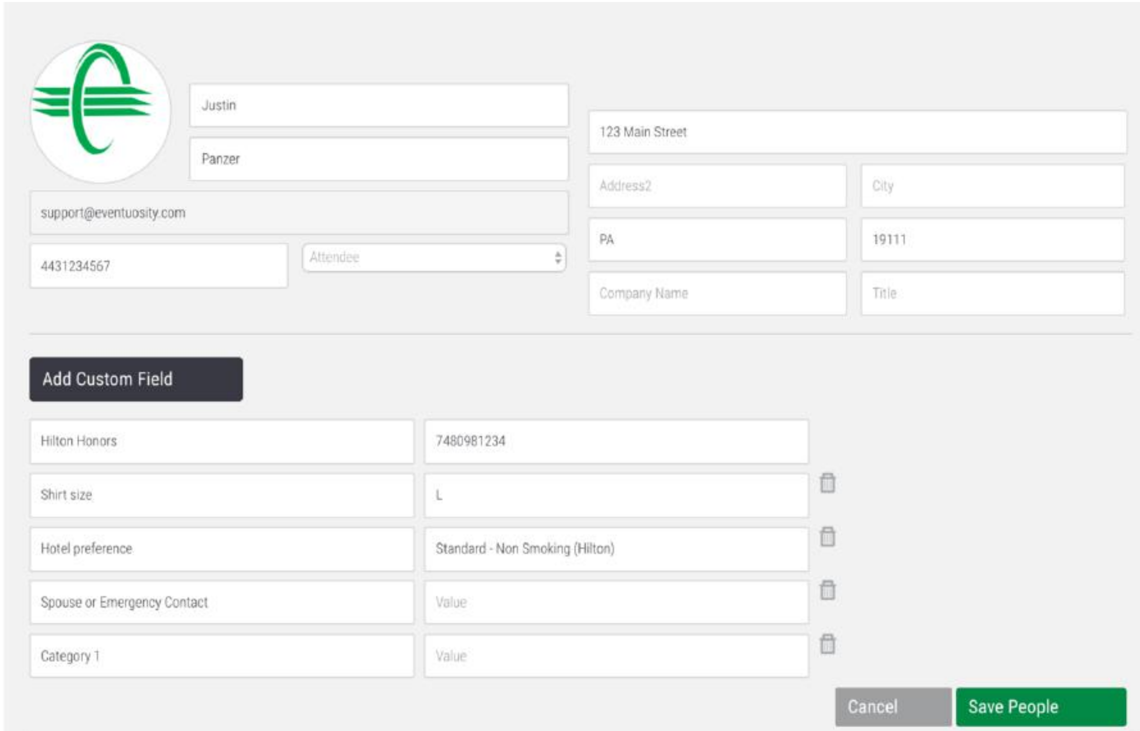


Figure 29 & Figure 30: Add custom data to attendees for a single event or in their profile

Other custom data can be added to a person's record as an attachment. Speaker bios, press photos, presentations, registration documents, etc. can be added to a profile.

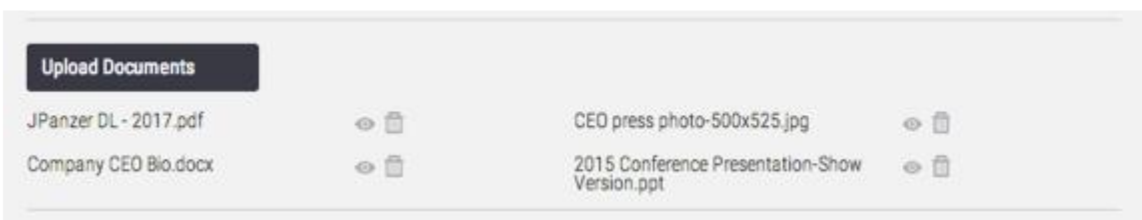


Figure 31: Files can be attached to a person's record

Roles Indicators

People in your Eventuosity database may be assigned roles at either an account or an event level. Event-level roles will be discussed in a later section of the Eventuosity User Guide. Account-level roles are indicated by a small tag next to the profile photo of a Person in your account. Green tags indicate that a Person's record is shared from another user's database.

Shared records appear when you are an Event Creator or an Admin in another person's account. You will be able to assign and contact shared People but you are not able to edit their profile data. Only the owner of the record can edit a Person.

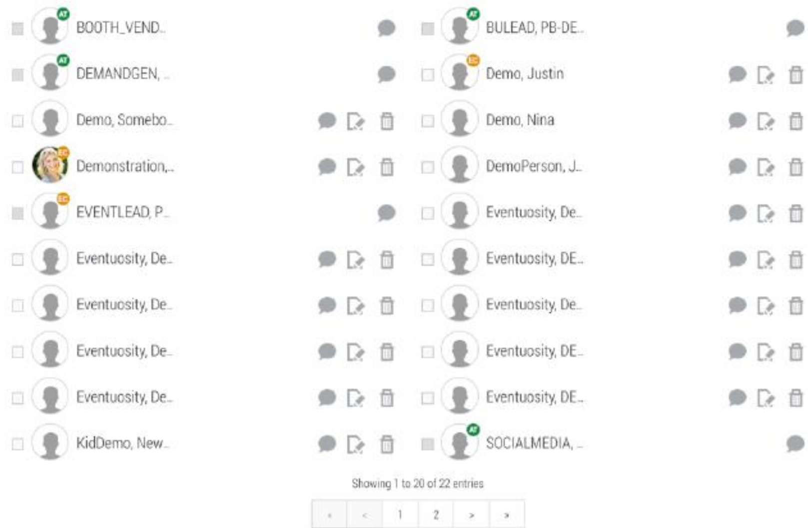


Figure 32: Event-wide role indicators are shown in All People

Groups

Sometimes it may be useful to group people based on common traits like title, event role, travel plans, etc. Eventuosity allows user's to create static or ad-hoc groups from the People Management module or under any event. Groups can be used to quickly add multiple people to an event or sub-event, communicate with several people at once, or assign tasks and resources to multiple responsible persons. There is no limit to the number of Groups that can be created or the number of people that can be in a group.

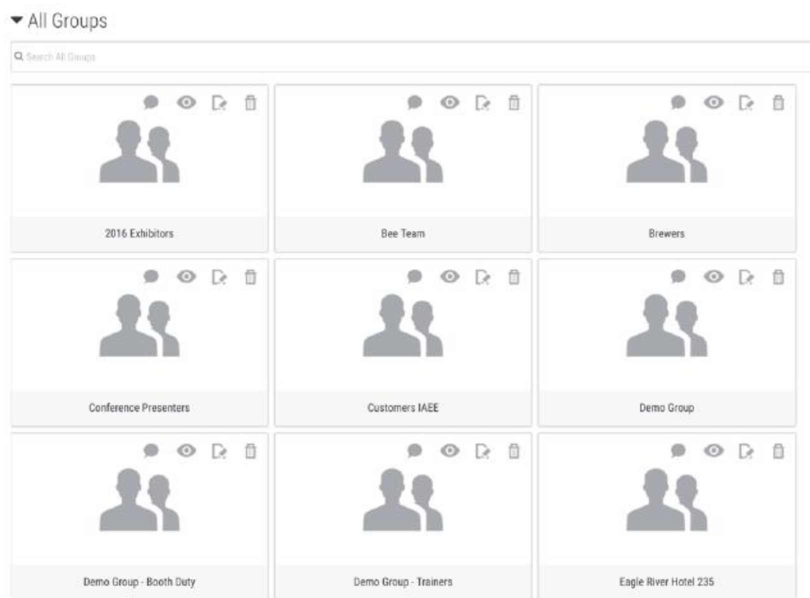


Figure 33: Creating groups can simplify communication and management

Use the View icon to see a list of People in a group.

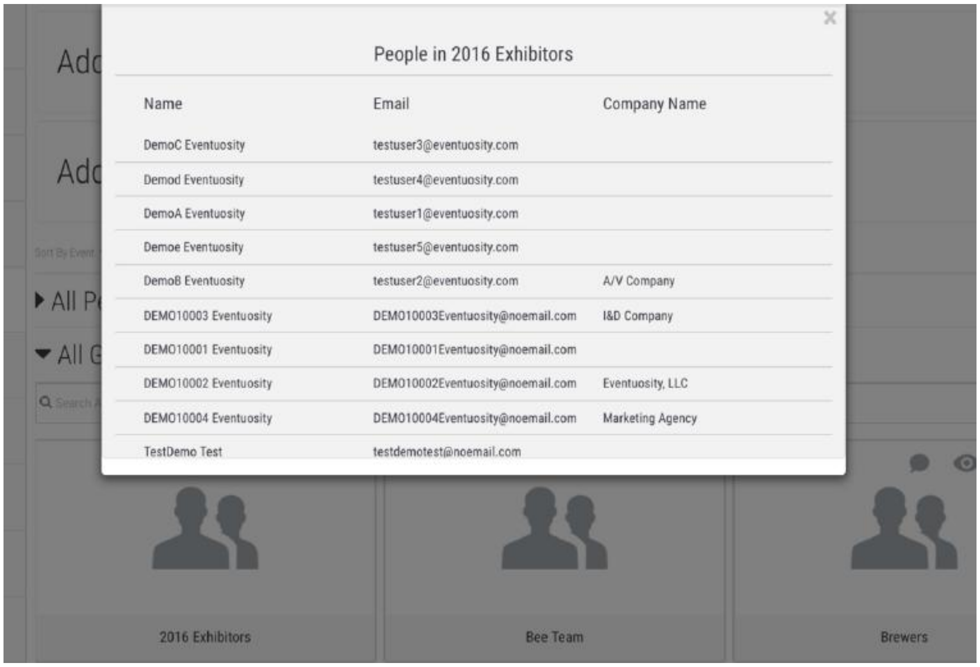


Figure 34: The View icon will display a listing of Group members

If an Event Creator or Admin determines that they need to create a group while working in an event, they can quickly do so using the link under the People section of the event window.

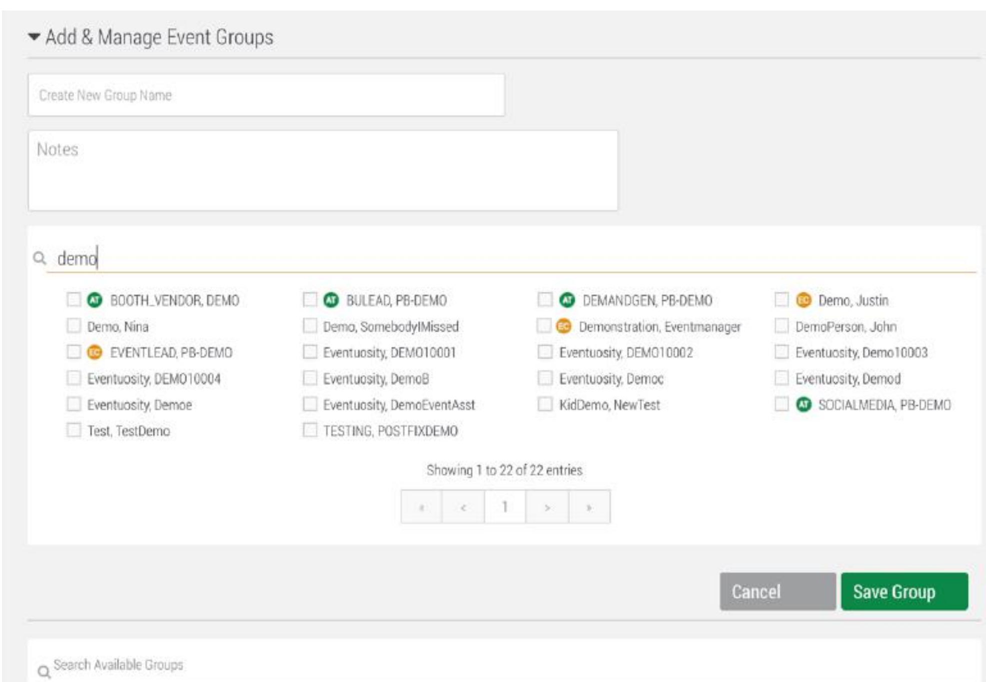


Figure 35: Create groups on the fly while working in an event

Adding People To An Event

Every person in a user's People database is shown in the People section of an event under Available People. Search Available People for the participants to be added to the event and check the box next to them to include them in the event. After selecting all the people to be included in the Event, click Save to move them to the Confirmed People list.

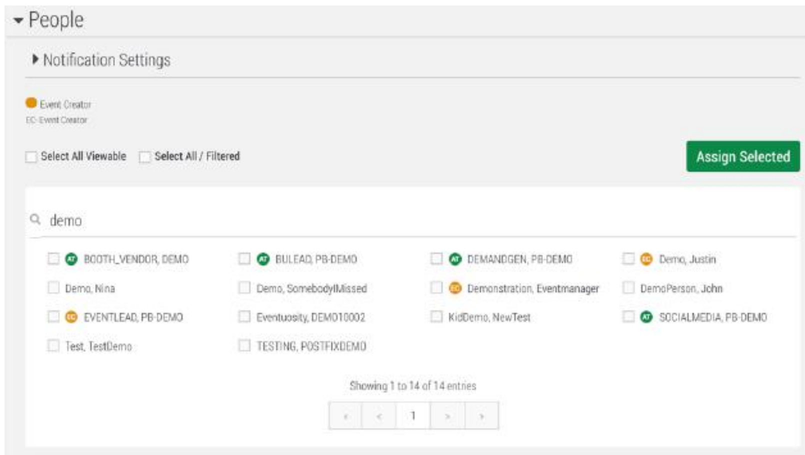


Figure 36: Search Available People to add existing contacts to an event

All People and Groups added to an event are shown in the Confirmed People area. Confirmed People can be removed (set back to Available People) or have their profile data edited from within the event. If necessary, new Groups can be created from within the event.

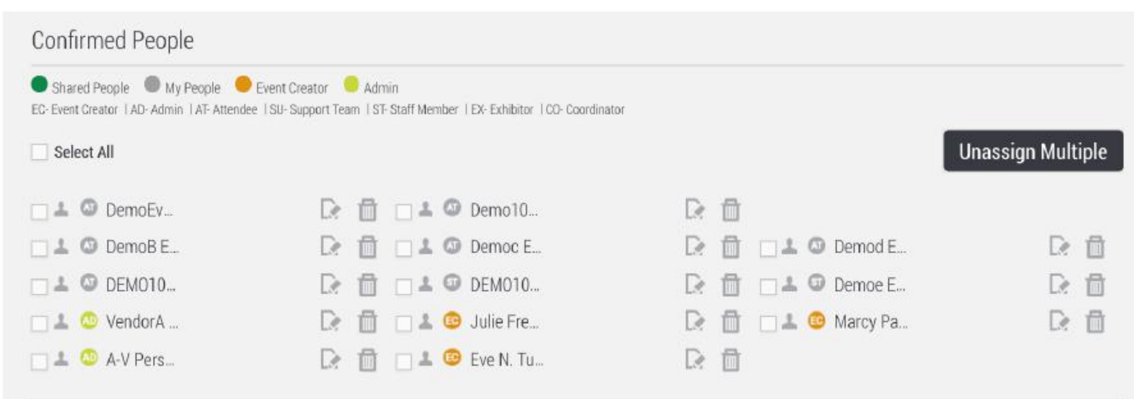


Figure 37: Confirmed People shows individuals and groups that have been added to the event

When working with people in the Manage People module of Eventuosity, Admins can quickly add someone to one or more events without viewing each event separately. This saves time when there are people or groups that will be participating in multiple events throughout the event manager's scheduling period.

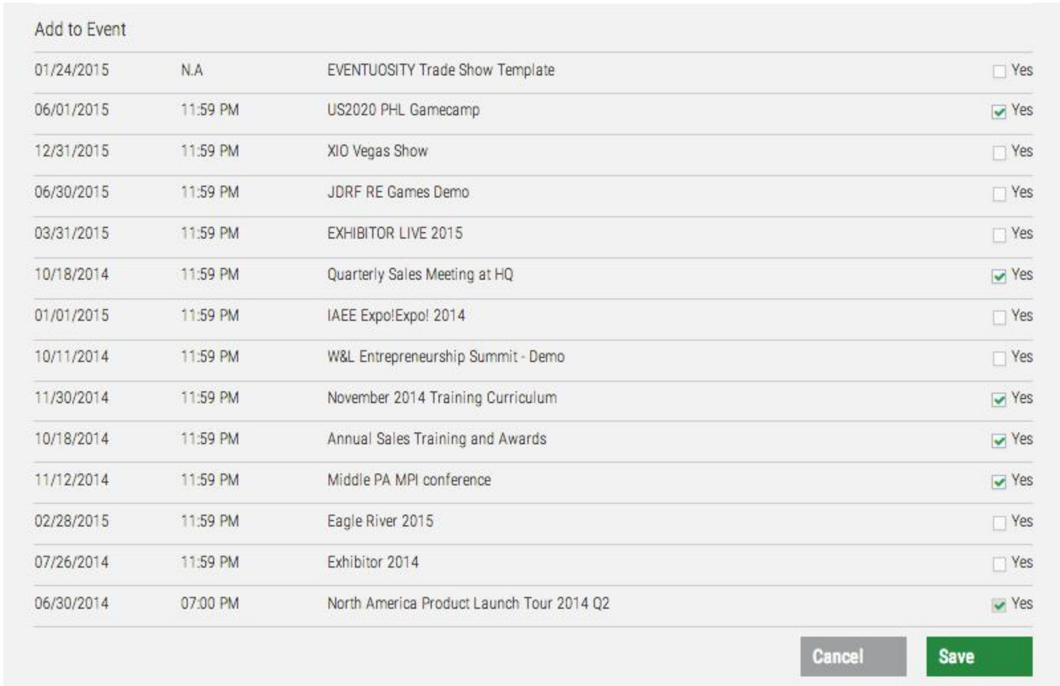


Figure 38: Add people to one or multiple events quickly from the People Management module

Each participant added to an event will receive an email and/or mobile push notification informing them that they have been included in the event.

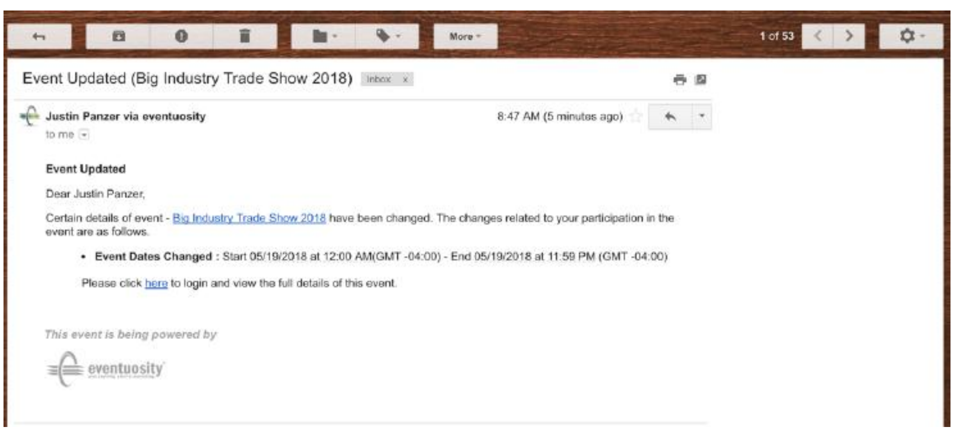


Figure 39: Example email notification sent to an attendee

Figure 40: Example mobile push notification sent to an attendee with Eventuosity mobile app installed

Roles

People can be assigned roles at the discretion of the event manager. Eventuosity includes six standard permission levels with corresponding roles. Roles are summarized here with full detail on each permission level provided in Appendix A of this User Guide. The six standard roles are:

1. **Event Creator** – The Eventuosity account holder. This user can add, edit and delete any information; assign roles; and view all data for every event. Eventuosity subscriptions include only one Event Creator unless upgraded to an Enterprise level.
2. **Admin** – This user is assigned by the Event Creator. The Admin can perform most tasks of the Event Creator but is prevented from deleting an entire event; changing What and When data of an event; certain account management functions; and certain People management functions. The Admin can assign and manage tasks, confirm new attendees to an event, create schedules, and more.
3. **Exhibitor** – Many Eventuosity users have responsibility for the production of trade shows or other events that feature exhibitions of products or services. For such projects, an Exhibitor role is available that may be used to inform participants of deadlines and assign them tasks. Event organizers may view task status across all Exhibitors but Exhibitors are limited to viewing their own assignments.
4. **Staff Member** – In addition to viewing and editing their own data, Staff Members have read-only access to most scheduling data, event

participants, and budget categories. They are not able to see tasks assigned to others, contact other event participants without permission, or see complete budget detail.

5. **Support Team** – This role is well-suited for vendors and contractors that may be important contributors to an event but should not have access to data that may be proprietary to your organization. Limited Access to schedule, people, budget and resources is very limited.
6. **Attendee** – This is the default role for any person added to an event. Attendees can see basic event information and can be assigned tasks or resources. Add, edit and delete functionality is restricted for Attendees.

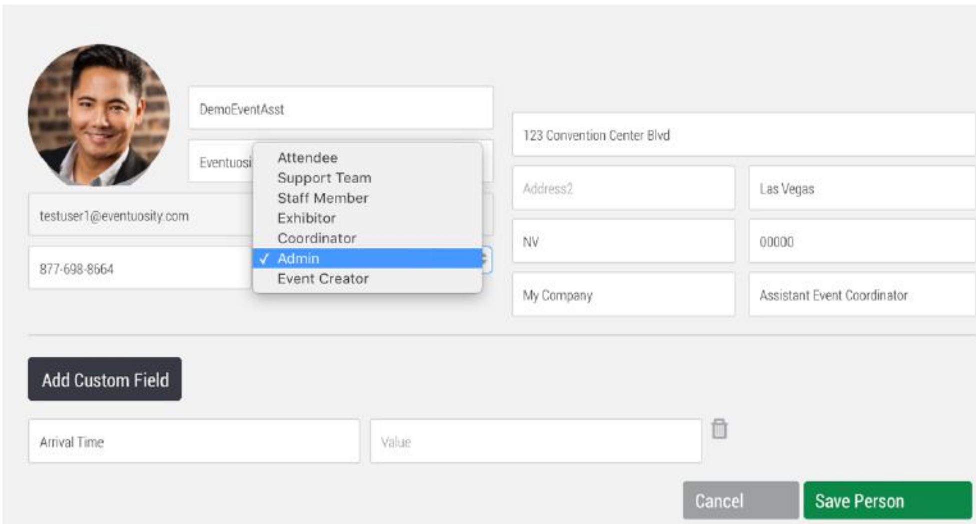


Figure 41: Assign Admin rights to an attendee for one or more events

Custom roles can be created for Eventuosity customers on a fee basis as required.

Custom Roles: Enterprise Master Users

In the case of certain Enterprise deployments of Eventuosity, multiple Event Creators are required under a single account. For such cases, Eventuosity supports an Enterprise Master User role under which multiple Event Creators may be assigned. The following sections describe the Enterprise Master role, the steps to assign and manage multiple Event Creators, and how Event Creators will work within their Eventuosity account.

Enterprise Master Users have all of the permissions of Event Creators (account holders) but with the added capability to assign multiple Event Creators on an account-wide or per-event basis. This feature is only available when purchasing an Eventuosity Enterprise subscription which includes customizations for the account holder.

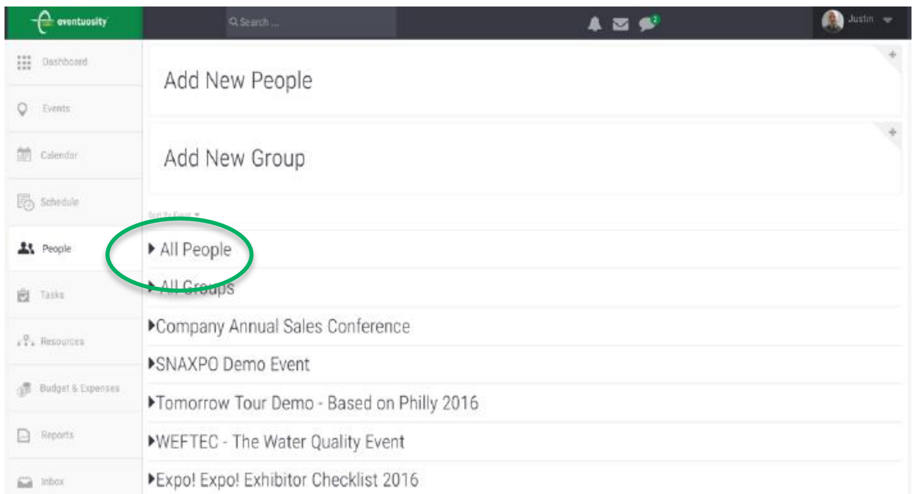
Assigning Account-Wide Event Creators

Enterprise Master Users may assign Event Creators on an account-wide or per-event basis. Event Creators have full create and delete permissions as well as full read/write access to events in which they've been designated an EC or in events that they create.

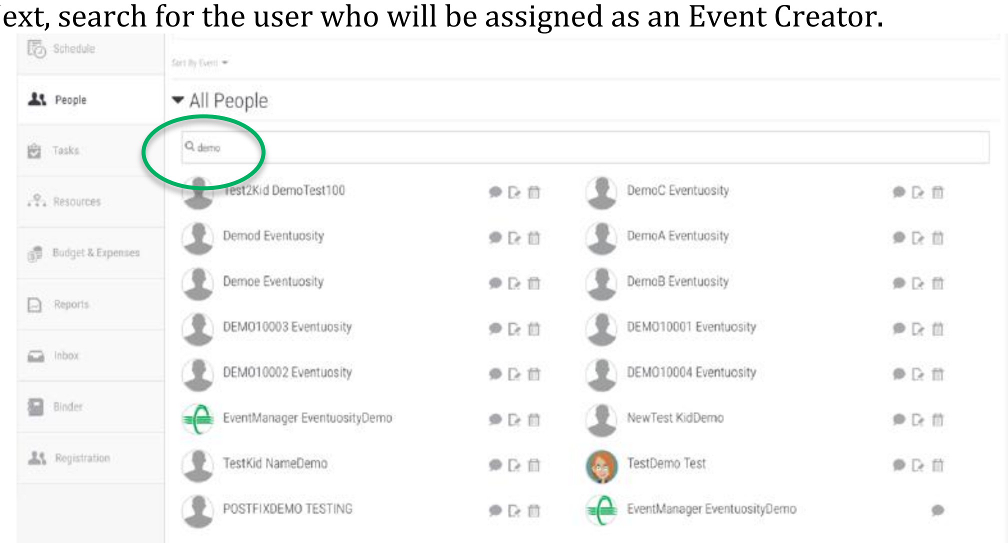
To assign an EC on an account-wide basis, giving them ability to create new events and full read/write access to them, the Enterprise Master User must open the People module by clicking the People section on the Home Screen or the Task Bar.

Once in the People module the Enterprise Master User must select the user to whom Event Creator privileges will be assigned.

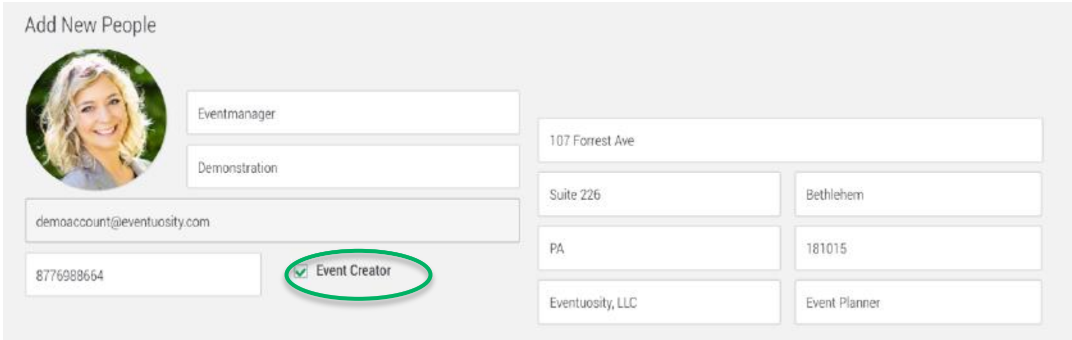
First, select All People:



Next, search for the user who will be assigned as an Event Creator.



Open the user's profile by clicking the Edit icon and place a check in the Event Creator box.



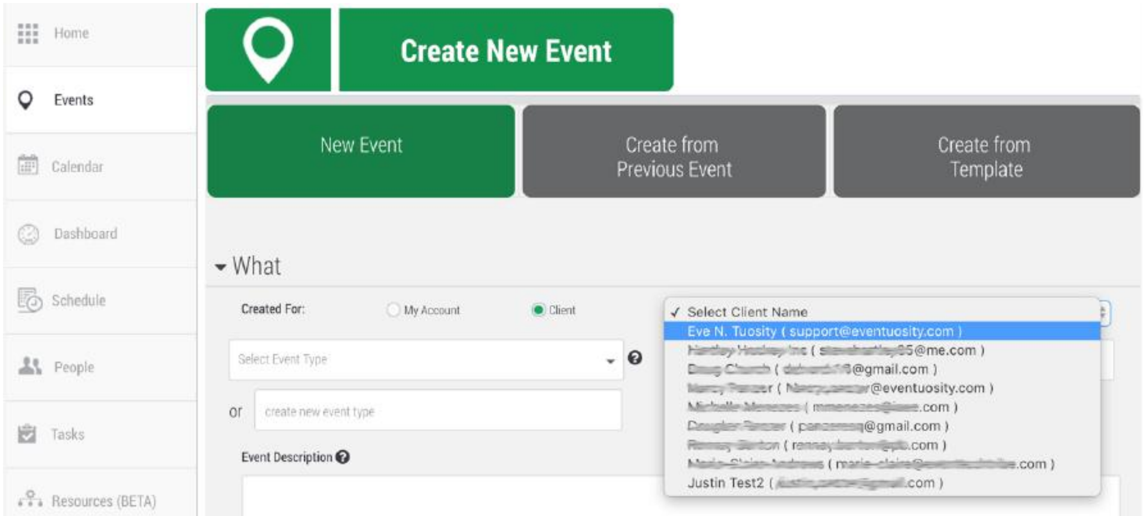
After filling the box, click Save to assign the Event Creator role to the user. The user is now an account-wide Event Creator with ability to create new events and perform all event-related tasks.

Event Creators in Enterprise Accounts

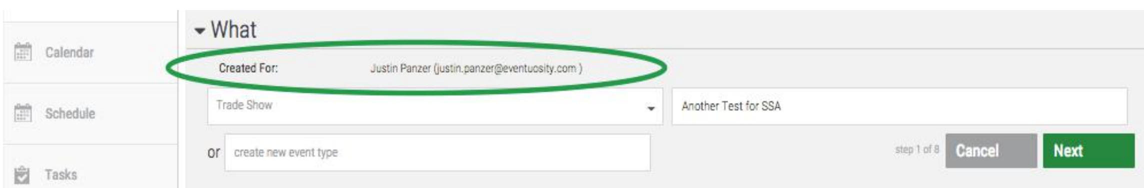
When users in an Enterprise account are upgraded to an Event Creator role, new options will appear to them in their event projects.

The most notable new option is a radio button and associated dropdown that indicates the master account under which an event is created. Event Creators who have their own Eventuosity subscription AND are assigned as an EC in someone's Enterprise account may select which of the accounts their event is being created under. If the user does not have their own Eventuosity subscription, they will only be able to select the Enterprise account(s) for which they have been given EC rights.

In the example screenshot below, the user is not a subscriber and can, therefore, only create an event under the account in which they are an Event Creator. It is possible for an individual user to be an EC in multiple Enterprise accounts. This is common in the case of vendors, suppliers and contractors that may service several event planning clients. In such cases, multiple accounts (designated by the user ID of the Enterprise Master User) will be shown in the dropdown field.



When working in an event, a Event Creator will always see the user ID of the Enterprise account for which the project is created.



Tasks

Eventuosity is the first event planning and management application that treats events like the complex projects that they are. The key difference between Eventuosity and leading project management applications is that Eventuosity handles task assignment and tracking specifically in the context of an event.

All Eventuosity templates have a task list built in that is common to the event type. Of course, Enterprise Master Users, Event Creators and Admins in Eventuosity can build their own tasks, categorize them, assign them to themselves or others, set reminders, and create progress reports. Tasks can be assigned to anyone associated with an event regardless of their role and can be assigned to multiple people. This means that the planning team, corporate management, on-site staff, volunteers, attendees, vendors/suppliers and venue staff tasks can all be tracked and status reported back to the Event Manager.

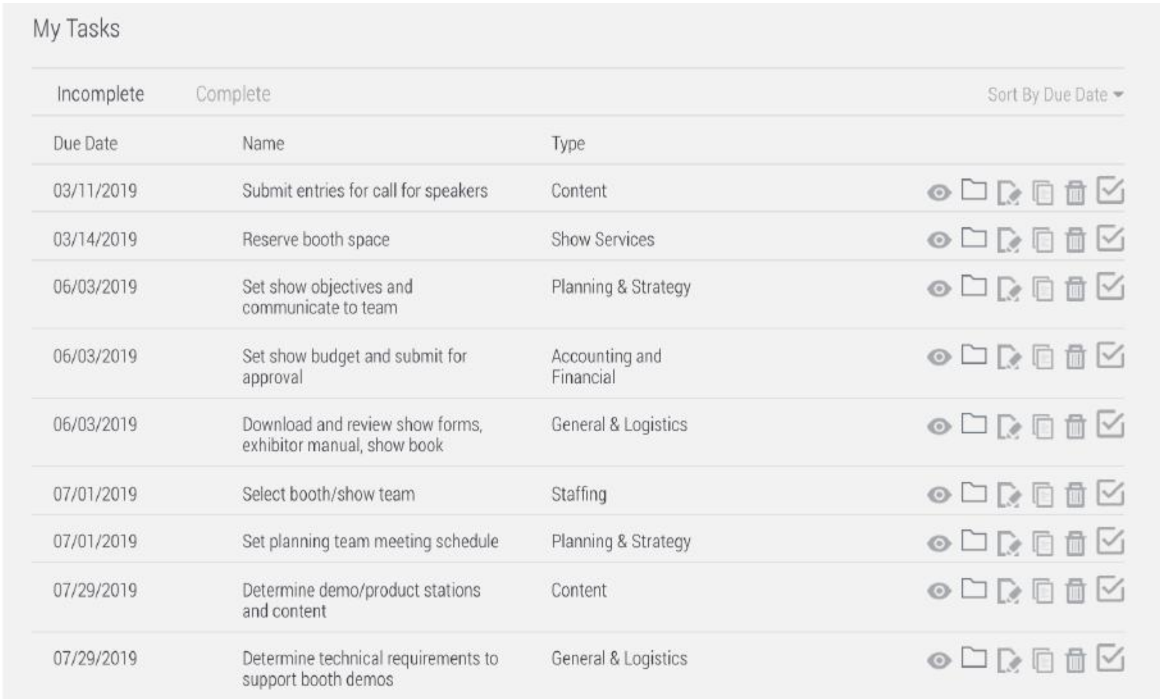


Figure 42: Above is a partial list of tasks from an Eventuosity event template

Creating a new task starts with clicking the Create New Tasks button.

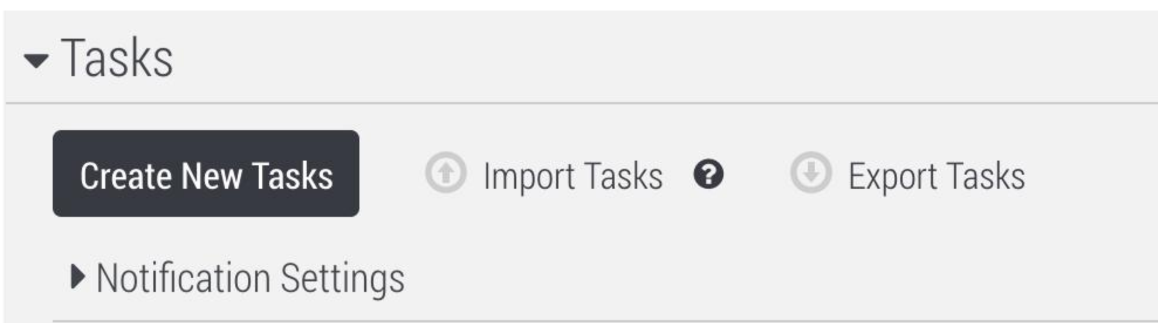


Figure 43: Start new task creation with one click

Each task can be categorized using an existing category or one that the user creates and stores for later use. In addition to a name the task has fields for notes, a start and due date, a reminder date for the assignor and a reminder date for the assignee.

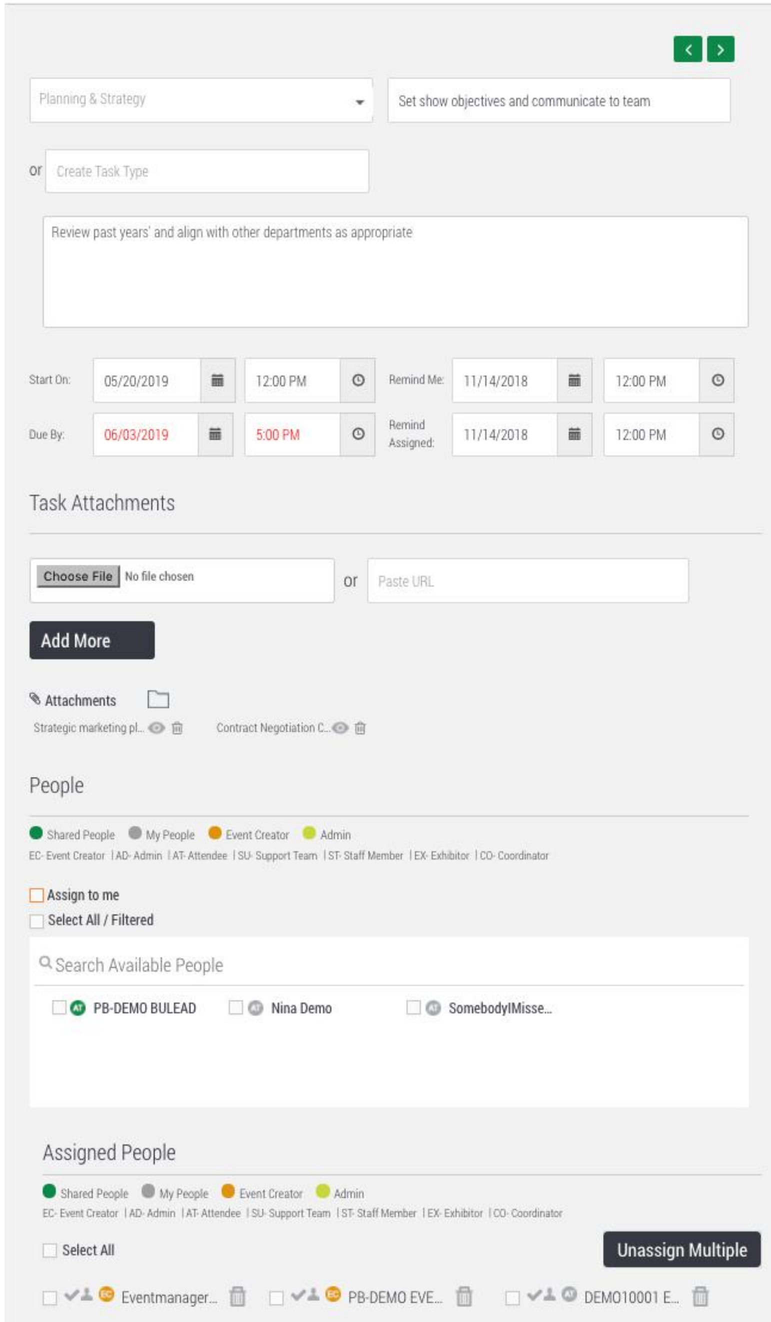


Figure 44: Tasks may include key dates, attachments, type and assignee data

Of course, many Eventuosity users migrate to our platform after having relied on spreadsheets for event task tracking. Though not very efficient, spreadsheets may have a lot of useful workflow information that can be used in building Eventuosity projects. For that reason, Eventuosity also allows users to create their task lists by importing spreadsheet data.

Simply click the Import Tasks button, select a CSV file with your task data, and map your spreadsheet's fields to the Eventuosity Task fields.

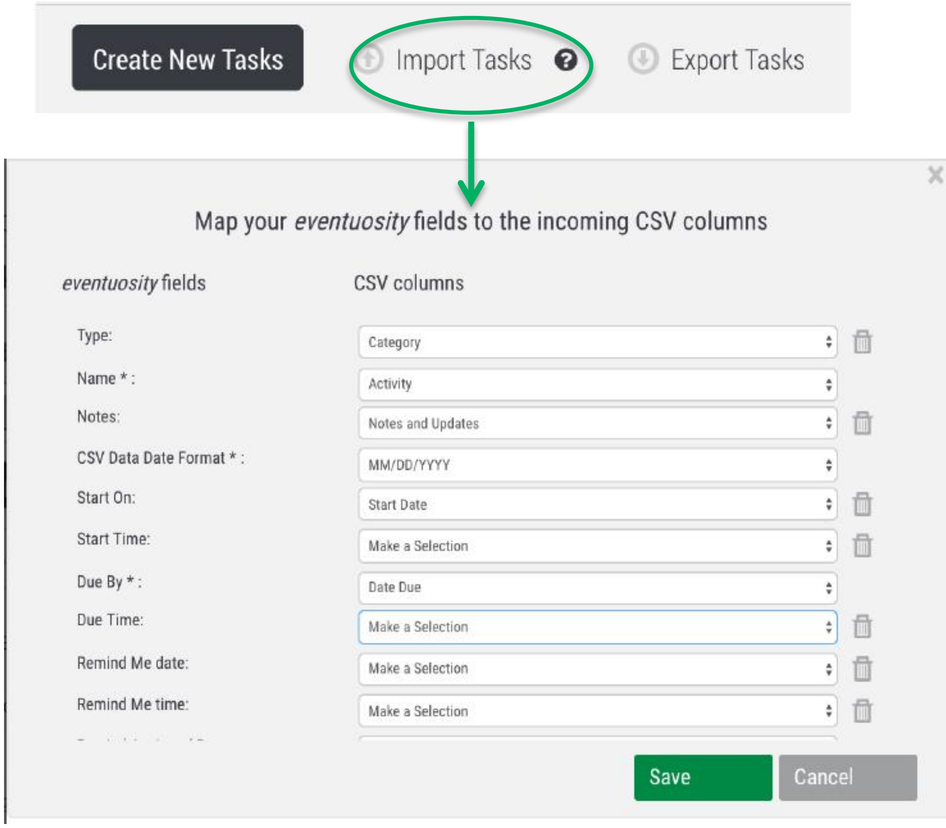


Figure 45: Import Tasks easily from a spreadsheet using the Import Task(s) button

Eventuosity also supports an unlimited number of attachments for any task. Attachments may be digital assets such as documents or they may be URLs that point the assignee to a place on the Internet where they can complete their task. Any attachment or link added to a task is automatically placed in the Binder folder associated with the task and can be viewed by clicking the Task Folder icon or the links within the task form itself

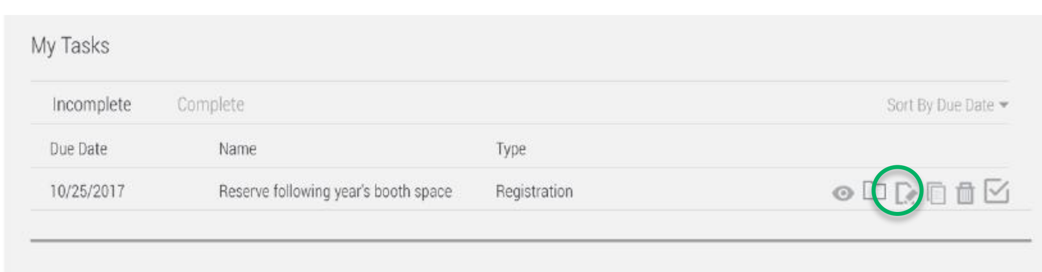


Figure 46: The Task Folder icon links to the associated Virtual Binder folder

Tasks that are assigned to others include an icon next to each responsible attendee that indicates if they have completed the task or not. As assignees mark their tasks complete, the check mark icon will become green under the assignor's account. Administrative users can mark tasks complete, or revert them to incomplete, on behalf of the assignee.

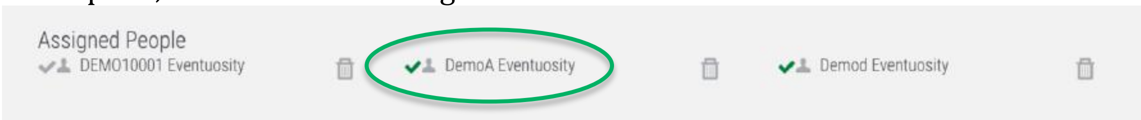


Figure 47: Task completion status for each assignee is indicated by a check mark

In addition to the automated reminders that are set at the time a task is created, administrative users can manually send a reminder at any time to the assignee(s).

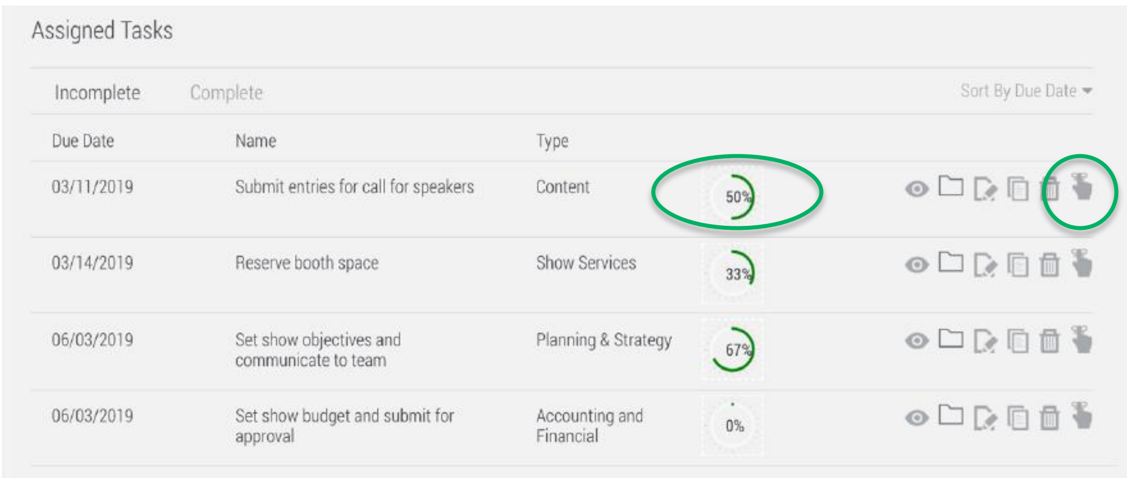


Figure 48: Check Task status and send manual reminder from Tasks list view

Task alerts are sent by email and/or mobile push notifications depending on the end-user's settings. Each task assignee can view their assigned tasks and provide status to the Event Manager.

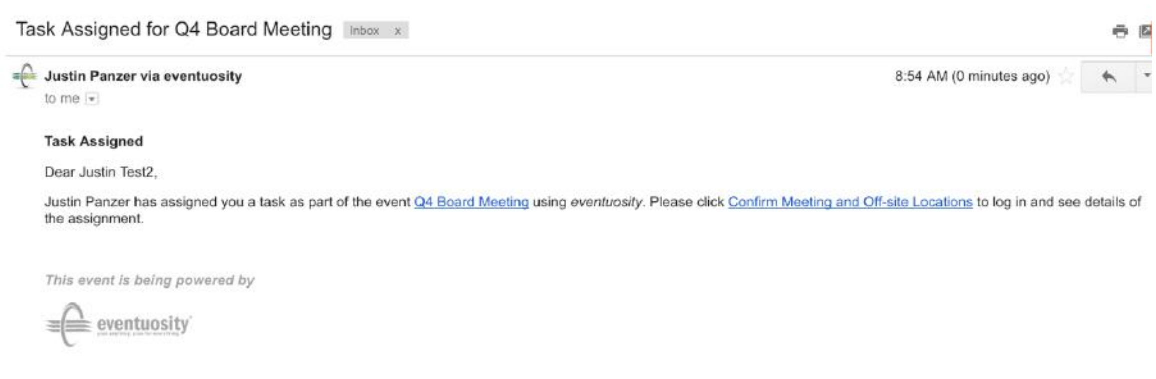


Figure 49: Email Task alert example

Figure 50: Tasks are viewable on mobile devices and notifications may be sent for all task reminders

Task status is updated in real-time, meaning that Eventuosity users can determine the most up-to-date completion level for everything that has been assigned. Tasks that are 100% complete can be viewed by toggling from Incomplete to Complete under Tasks.

There are many ways to view tasks including:

- By Type
- By Due Date
- My Tasks vs. Assigned Tasks (for Admin level and above)
- Complete vs. Incomplete

Task reporting (discussed in Reporting section) allows for additional filters and sort criteria.

Budget and Expenses

The Eventuosity Budget & Expense module allows user's to create a budget and manage all relevant expenses in real-time. Budget categories can be created quickly using the Add Line category under the Budget & Expenses module.

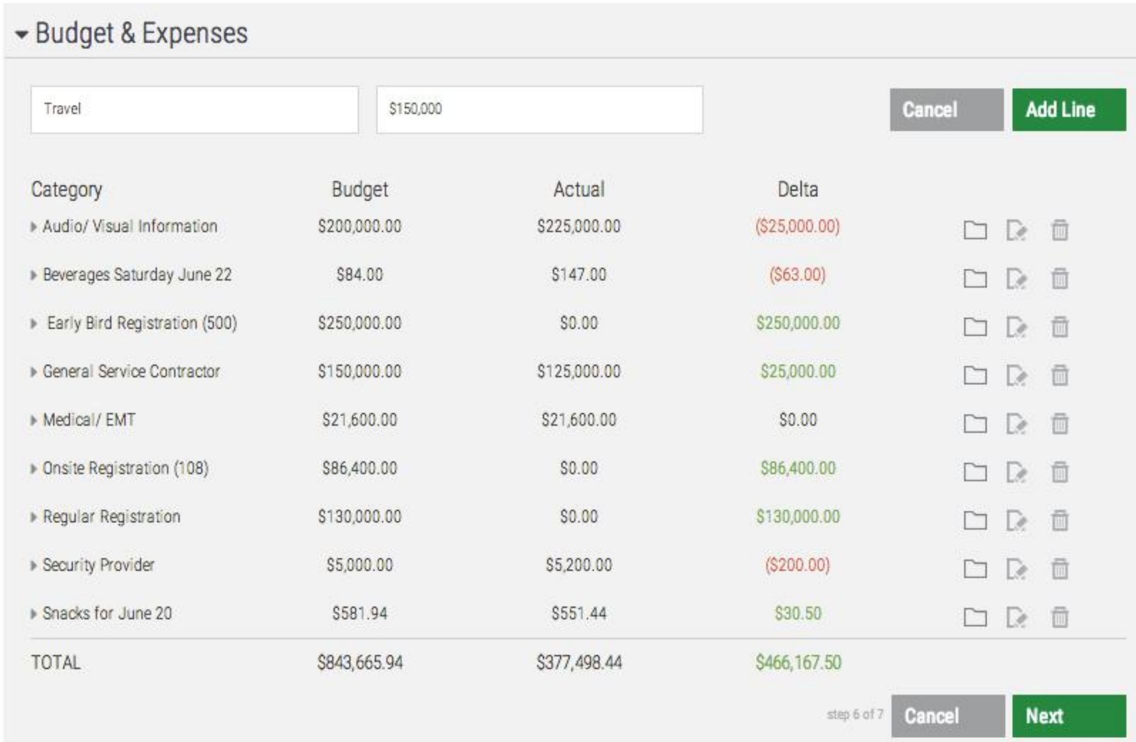


Figure 51: Example budget and expense detail for an event

Upon creation of the budget line, expenses can be added and a Binder folder is created where receipts, invoices and other financial documentation can be stored.

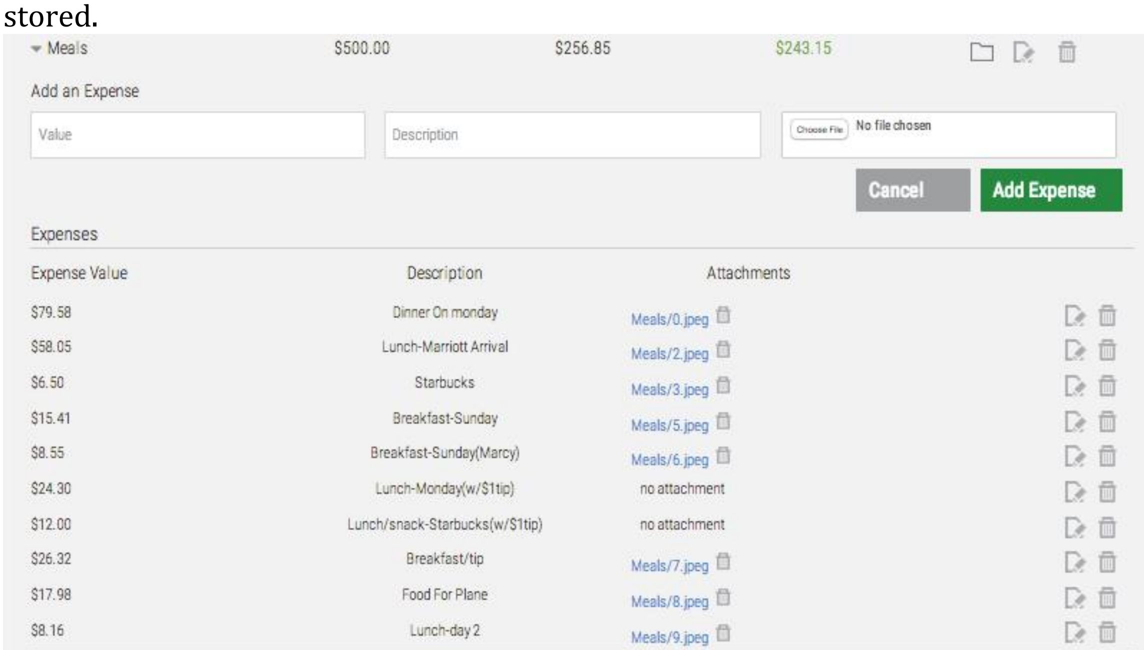


Figure 52: Expanded view of a budget category in an event with receipts attached

Figure 53: All expense attachments are placed in the appropriate binder folder

Full budget and expense details are available to Event Creators and Admins. Other roles have access to enter expenses and upload expense documentation but are prevented from viewing the event budget or expenses entered by others.

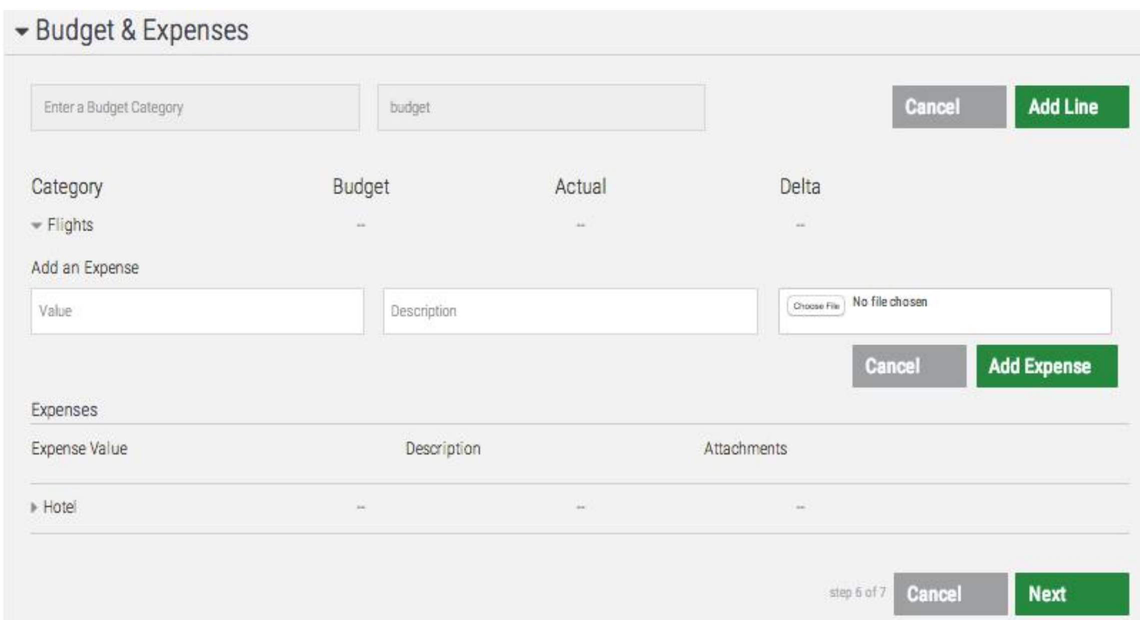


Figure 54: Certain roles allow users to submit expenses without viewing budget data

Expense data can be entered into Eventuosity from the web or mobile apps. As soon as data is saved the budget variance is updated to reflect current status.

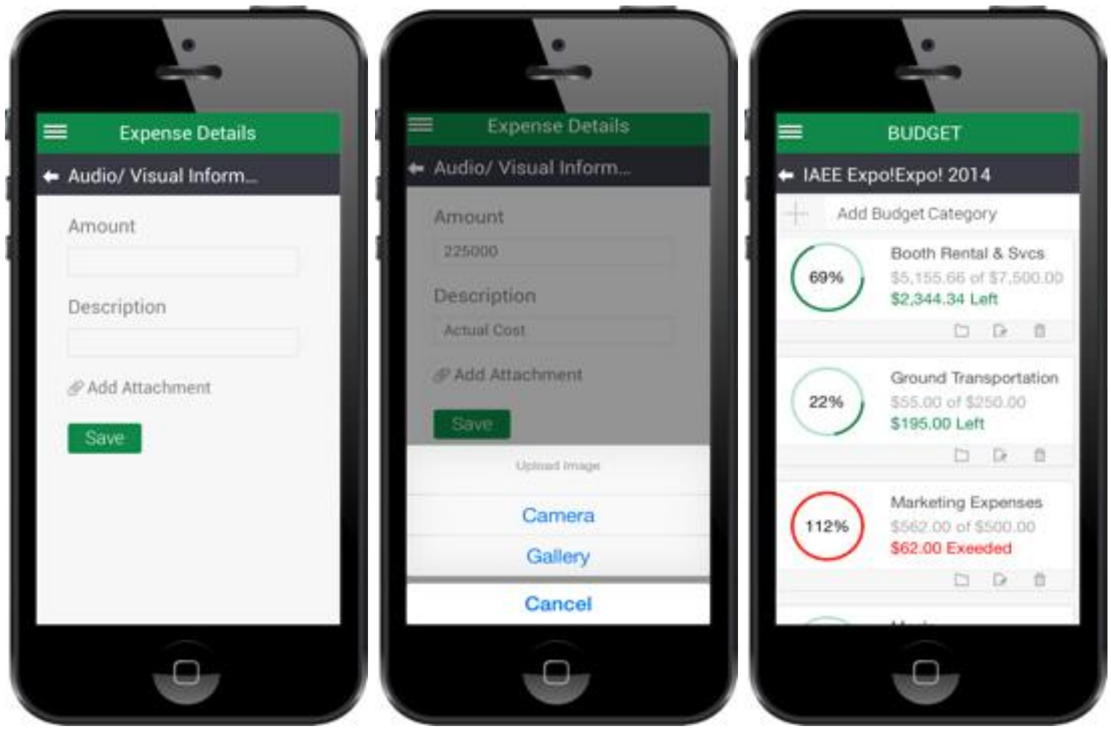


Figure 55: Mobile expense submission and budget tracking

All budget, expense and variance data for a single event or multiple events may be exported using the Eventuosity reporting tools. All budget reports are available in CSV format as this is the most universally accepted by accounting and expense management software.

Schedule

Schedule is where users create sub-events that are part of their larger event project. Sub-events can be anything within the scope of the project timeframe including planning meetings, site visits, participant travel, day-of-event breakout sessions and more. All sub-events can be categorized and any number of event participants can be assigned to them.

In addition, sub-events can be scheduled in different time zones than the event project itself and in locations other than those saved in the Where section of the event. These two capabilities give the user the flexibility to include all relevant activities in their event project regardless of their site or time.

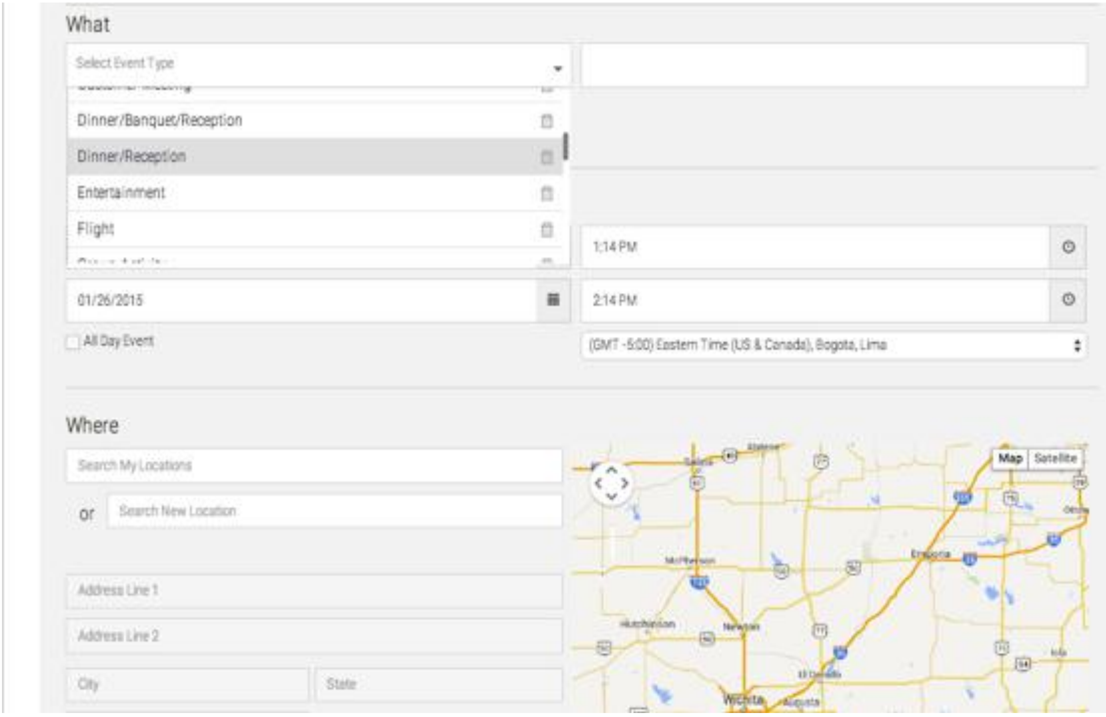


Figure 56: Create sub-events to build a calendar for one or all event participants

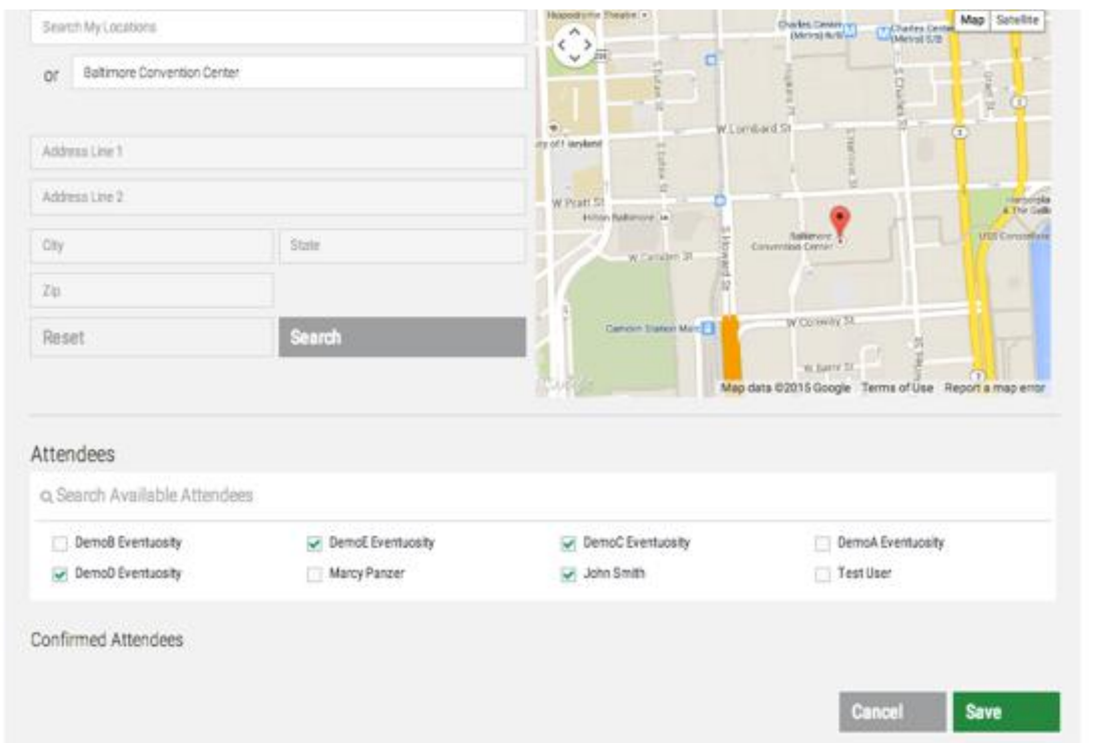


Figure 57: Sub-events can be in locations other than those at the event level and can include a sub-set of event participants

As event participants are added to a sub-event, they receive a notification that provides them with the event details. Sub-event notifications are sent by email and/or mobile push notification depending on the user's profile settings.

Figure 58: Mobile views of sub-event notifications and calendar screens

The sub-event schedule may be viewed as a list or in a calendar view. Some details of the schedule entry are shown when the user mouses-over the event in Calendar View. Clicking on the event shows full detail (depending on role).

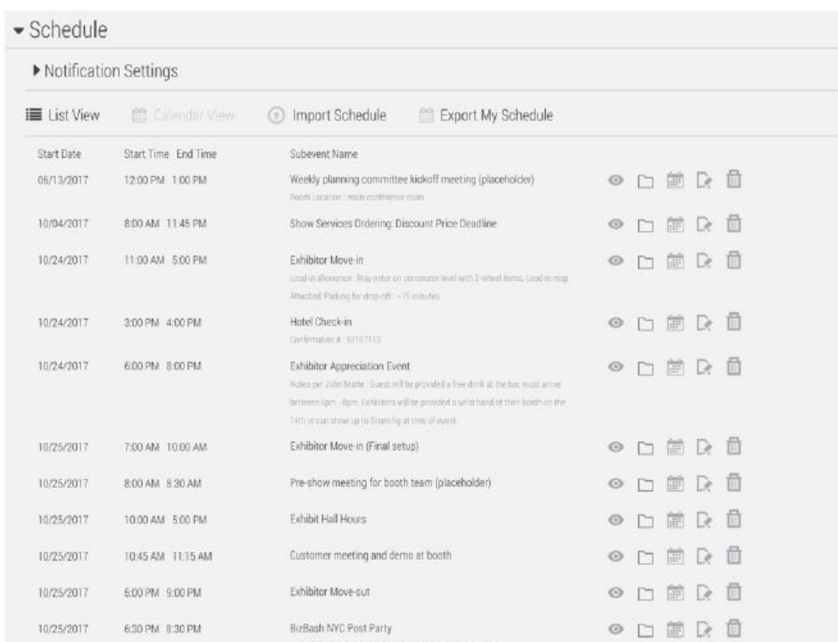


Figure 59: Example sub-event schedule in List View

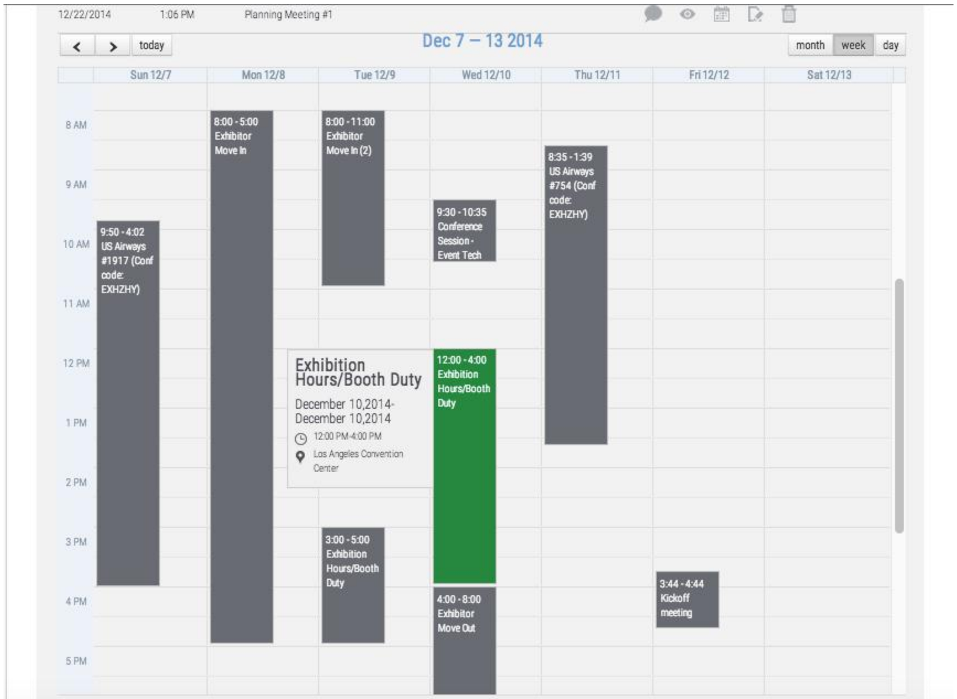


Figure 60: Example sub-event schedule in Calendar View

Sync Schedules With Calendar or CRM Applications

Ensuring that your event schedules align with your non-Eventuosity calendar, and those of your other event participants, is an important consideration. Therefore, Eventuosity allows you to sync your event schedules with third-party applications.

To bring external calendar data into Eventuosity, click Import Schedule and select the appropriate source for your data. Automated syncs are available with Google Calendar, Microsoft Outlook Online/Outlook 365, and Salesforce.com. Other calendar data may be imported via .CSV or .ICS file format. In the case of .CSV files, a field map similar to People and Tasks will be presented. For the quickest import of .CSV files, visit eventuosity.com/library to download our Schedule Import Template.

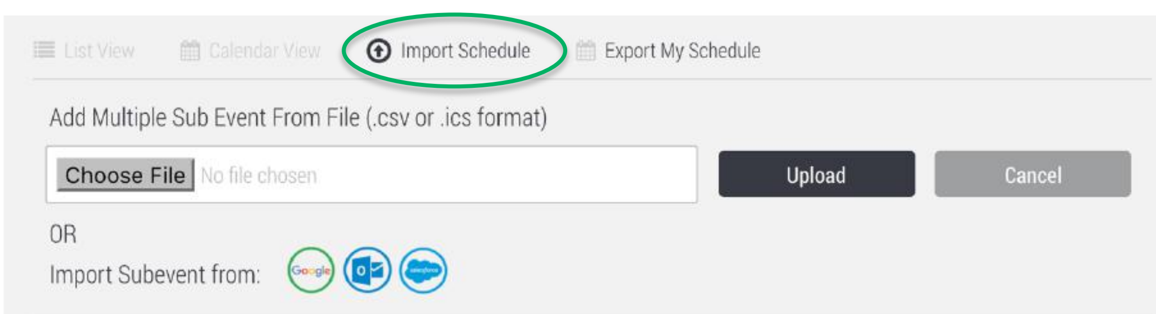


Figure 61: Use Import Schedule to add external calendar data to Eventuosity

Similarly, Export My Schedule allows users to sync their Eventuosity sub-events with several calendar applications. To export your Eventuosity schedule, click the appropriate logo icon, authorize Eventuosity to login to your application, and follow any application-specific prompts that are presented. In List View, any sub-event can be individually exported to your external calendar application.

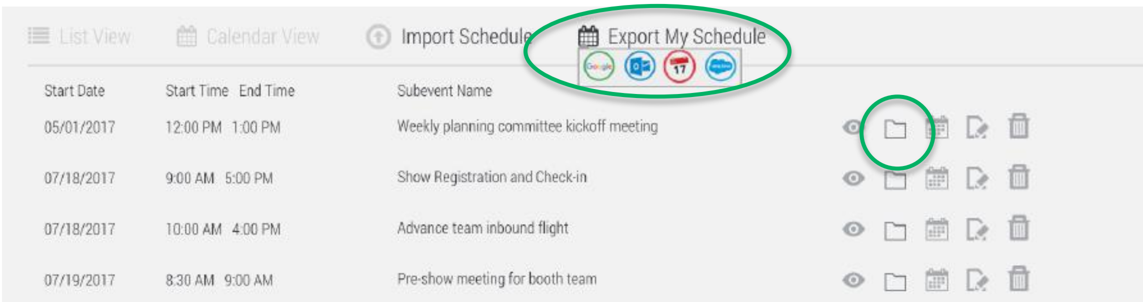


Figure 62: One or all sub-events can be exported to common calendar applications

Resources

Eventuosity gives users the ability to manage inventories of spaces, equipment, people and more with the Resources module. Resource categories are highly variable depending on event type but some common uses for Eventuosity's Resources module are assignment of breakout rooms, hotel room block inventory, trade show booth stations, audio-visual equipment, shuttle bus seating, classroom capacity, athletic team roster spots, on-site staff, volunteers, and more.

Click the Create New Resource button to begin creating inventory for an event.

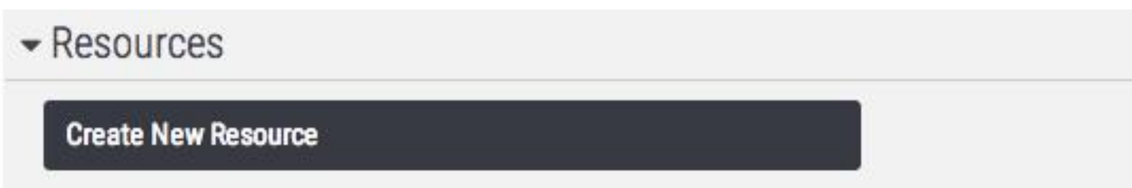


Figure 63: Create resources such as hotel rooms, breakout rooms, demo equipment, and more

Resources can use an existing category and unit of measure or custom data can be entered for each. Total inventory of the resource is set along with any required notes about the resource. Similar to Attendees, Tasks and Expenses, Resources in Eventuosity can have attachments and URLs associated with them.

When creating a Resource, a user can specify how it will be allocated. Resources can be allocated by Attendee, by Sub-event, or both. The allocation determines how the total resource inventory will be decremented throughout the event.

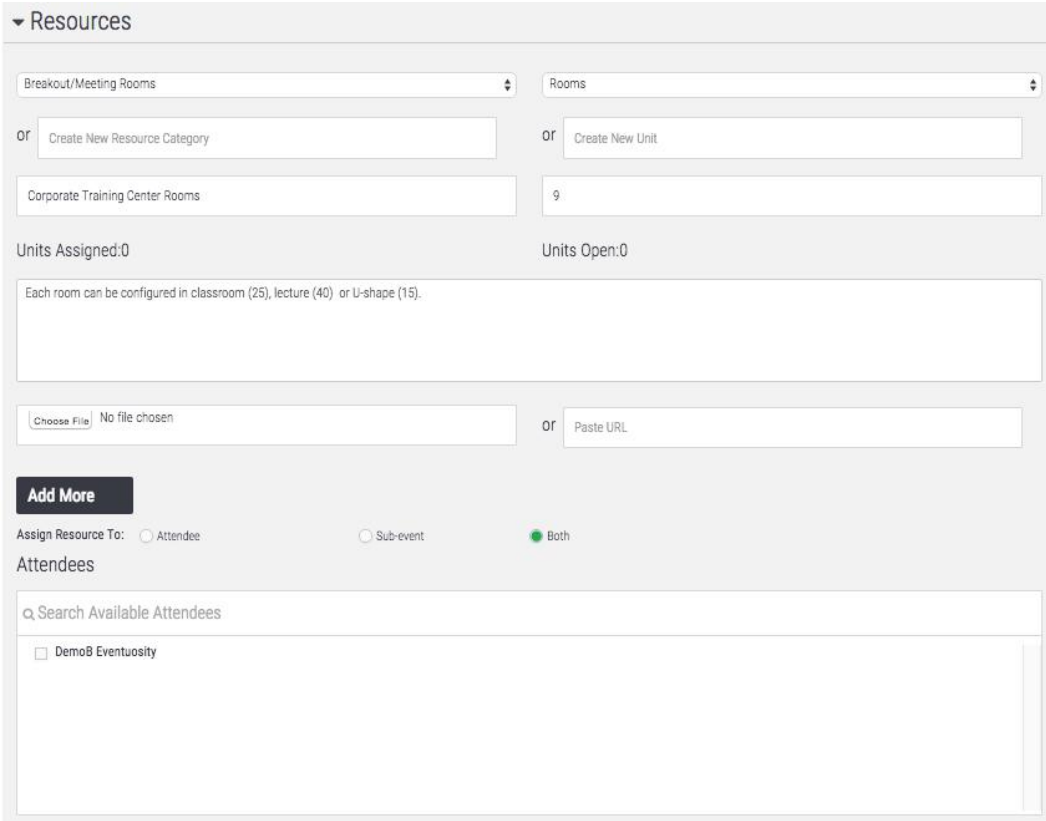


Figure 64: Resources can be assigned to people or to sub-events

All added information is placed in a Binder folder for the resource and can be accessed by the Event Manager or others depending on role. Common use of the URL attachment in Eventuosity is to point to a 3rd party reservation system that may be in place with a venue or company where the event is being held.

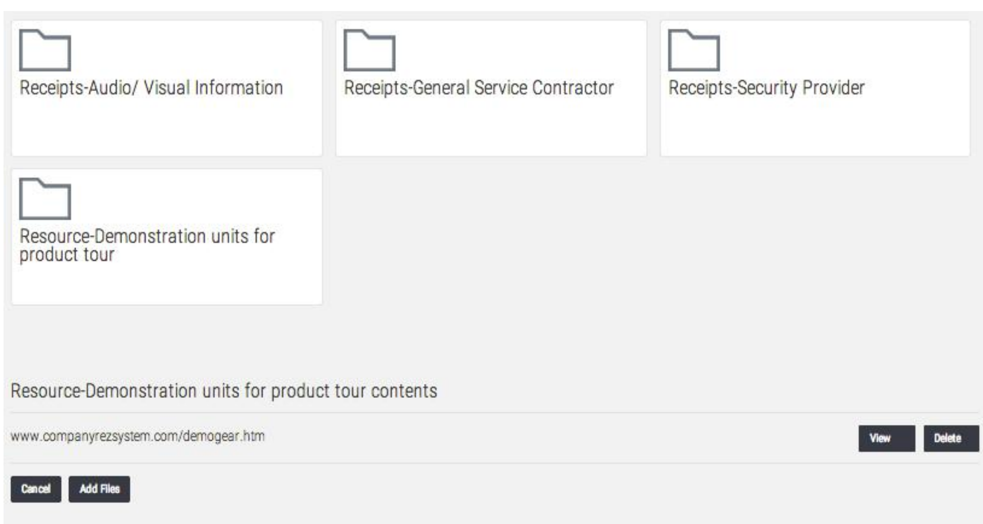


Figure 65: Resource attachments and URLs are placed in the appropriate virtual binder folder

As stated above, resources can be assigned to Schedule events, to any number of people, or to both (up to the inventory maximum) in the event. Utilization and availability figures are updated in real-time once those assignments are saved. Eventuosity prohibits users from exceeding capacity and returns a warning when attempting to do so. Assigned resources are decremented as follows:

Allocation Type	Decrement
If allocated by Attendee	One unit decremented per Attendee
If allocated by Sub-event	All or partial inventory allocation based on quantity entered by user
If allocated by Both	One unit decremented per Attendee, 100% of units assigned to scheduled sub-event

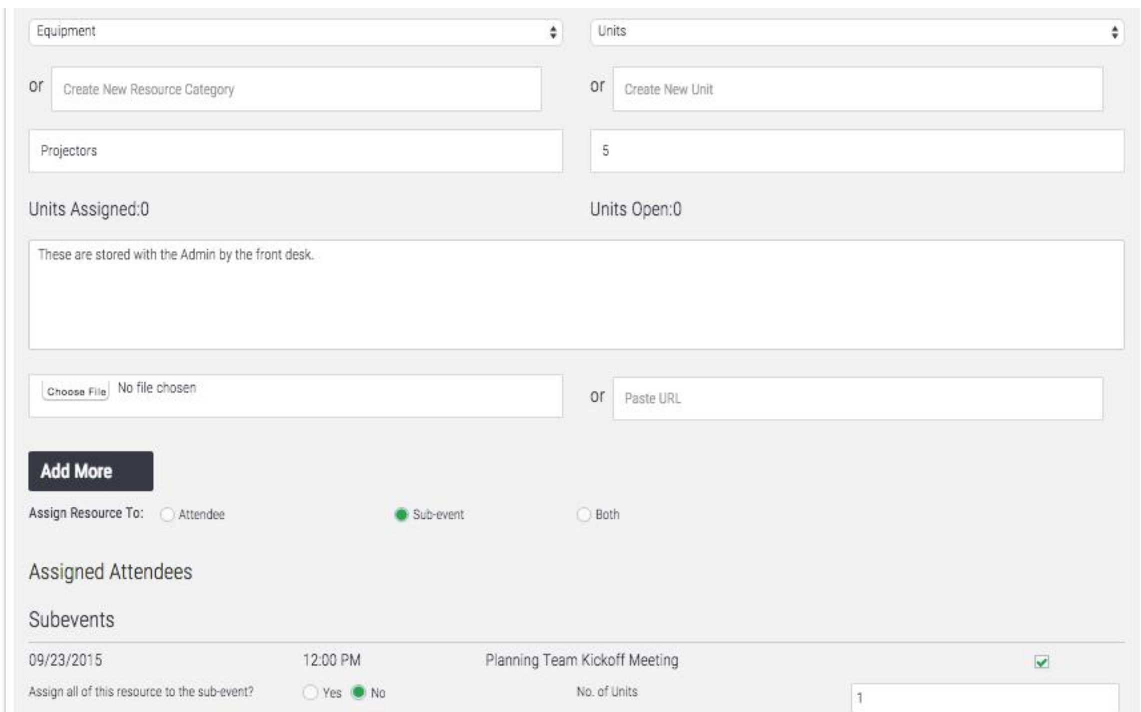


Figure 66: Partial Resource assignment example

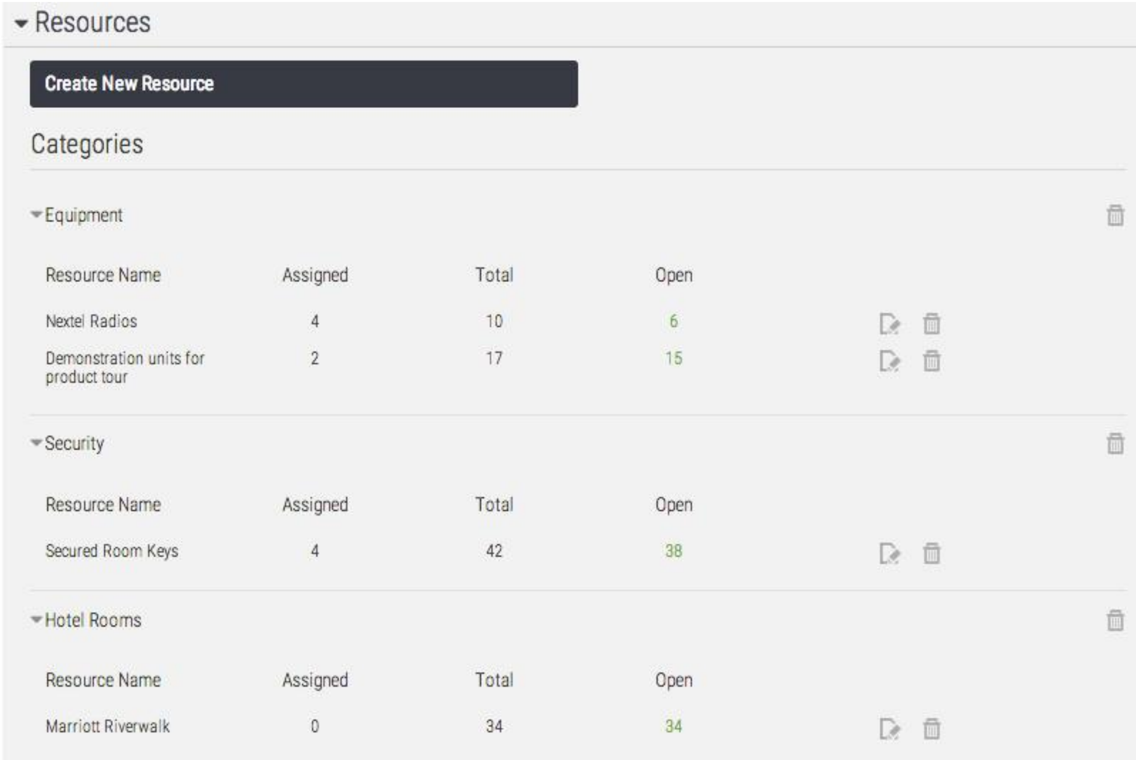


Figure 67: Example resource utilization overview

Customizations of the decrementing and warning logic is possible (on a fee basis) if required by the user.

Event Binder

Eventuosity takes the concept of a traditional event binder and applies it to documents and other digital assets. Each event has its own "Virtual Binder" with folders that can be customized by the user.

Figure 68: Use the Add Folder button to create needed sub-folders in your Binder

In addition to the folders created by the user, folders are auto-created and populated with assets added to a Person, Task, Sub-event, Expense, or Resource. For example, uploading a receipt from a mobile device to an expense category will automatically create a folder in which that receipt will be placed (and future receipts in that category) to reduce the amount of effort a user must perform on their device.

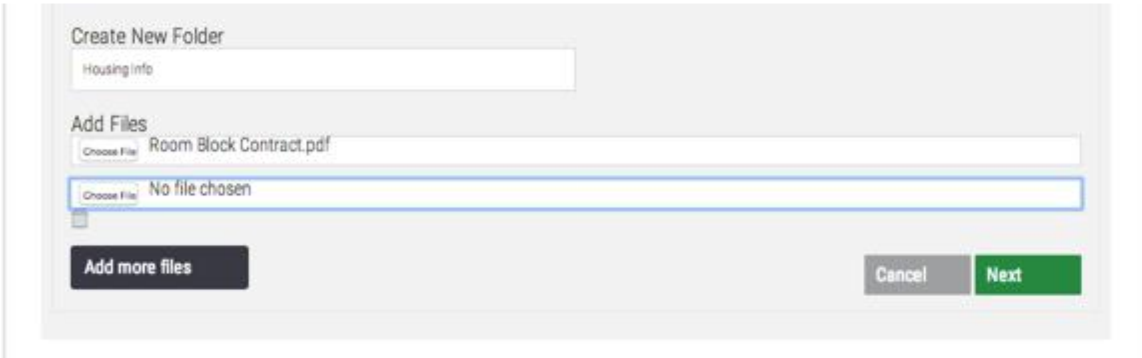


Figure 69: Create virtual binder folders and add files

Figure 70: Partial view of a binder for an Eventuosity event

Weblinks (URLs) associated with the event can also be stored in the Binder folders. This may be useful for version control purposes in that a file in cloud storage can be linked rather than re-saving the file itself to Eventuosity (or locally by the user) every time it is updated.

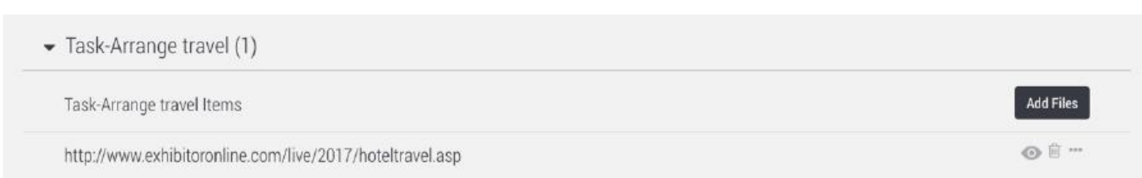


Figure 71: Clicking View next to a URL in the virtual binder opens the specified web page

In addition to storing contents associated with each of your Eventuosity events, you may use the Virtual Binder to create a repository of files and weblinks to be shared by multiple users and across multiple events.

Above the event binders in the Eventuosity Binder module you will find a binder titled "Event Management Files and Assets." This binder and its sub-folders are provided to allow you to store event-related materials that you or your team may need when working on future projects. Rather than store these items offline or in a separate application, you may keep them in Eventuosity to easily recall, share, and utilize them as required when managing events.

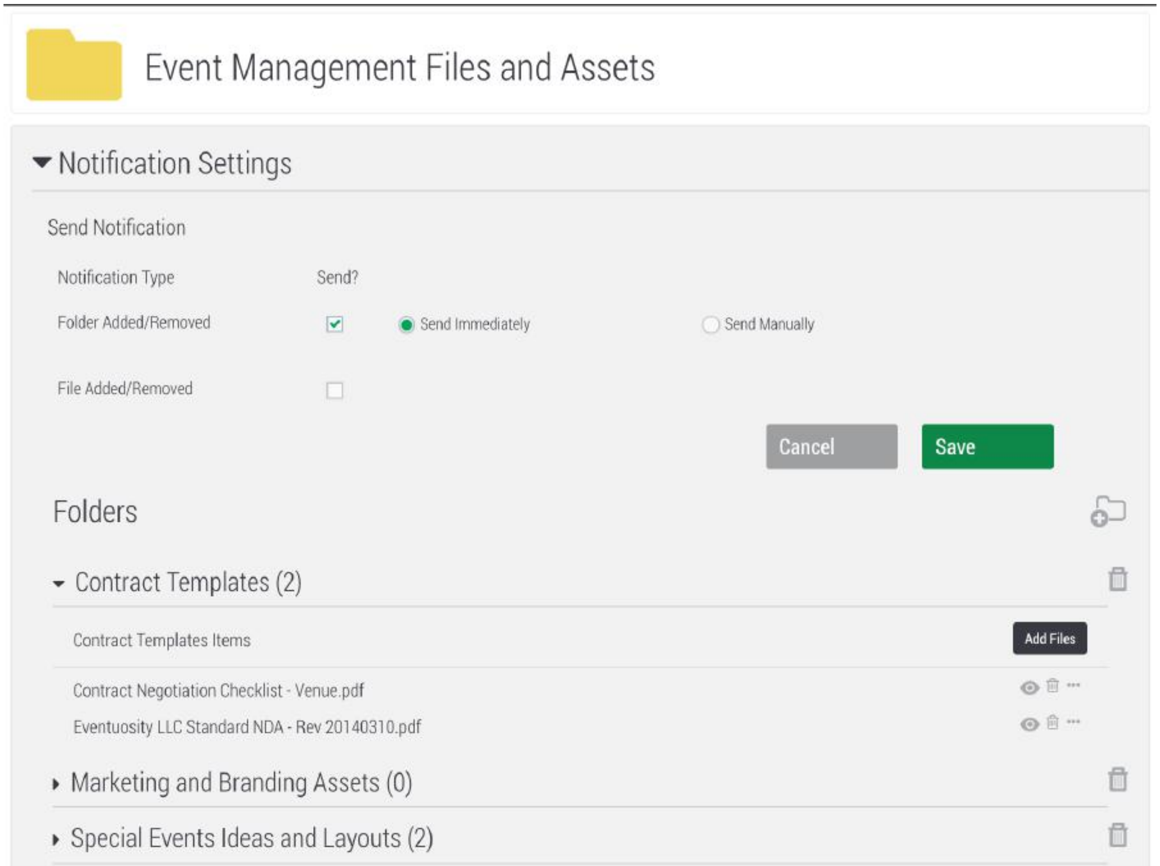


Figure 72: The Event Management Files and Assets Binder helps you keep all of your event-related materials in one place

Users may upload assets to the event binder from their iOS or Android mobile app. In the case of mobile uploads and viewing, file types may be restricted by the mobile device's operating system. The Eventuosity web app allows virtually all file types to be stored and viewed (some files may need to be downloaded to be viewed in their native application).

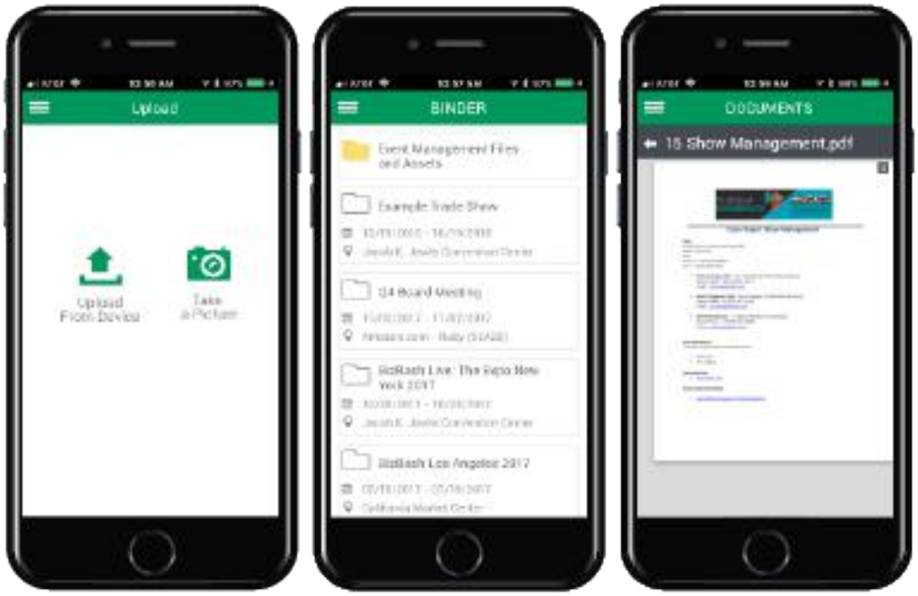


Figure 73: Mobile binder views

Both the Event Management Files and Assets Binder and the individual event binders have a number of actions that can be performed; either at the Binder or file levels. The familiar View and Delete icons are available at all times for each file as is the Add Files button in each folder.

Other actions may be performed using the ellipsis button in the Eventuosity web app or the grid button in the mobile applications.

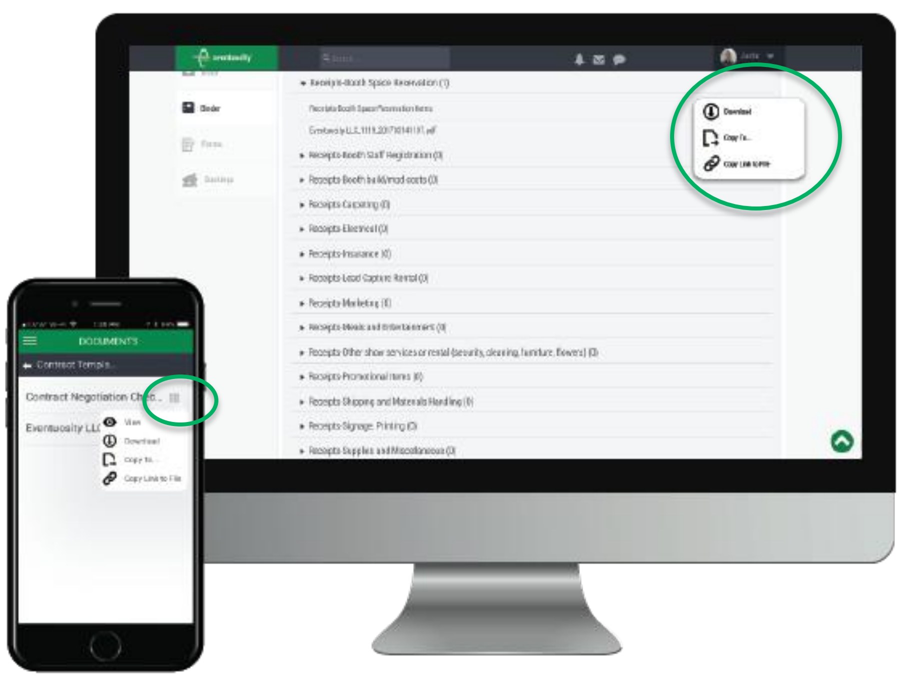


Figure 74: Multiple file-related actions are available in Binder

The actions available are:

- **Download** – Save the file to your device for offline access
- **Copy To** – Copy the file or link to another folder in the current Binder or in another event's Binder
- **Copy Link To File** – Copy the URL of the Binder item to paste in your browser's address bar or a message you are sending to someone who needs to access it

Access to Binder contents is permission-based. Customization of Binder access rights based on role and/or permissions is possible (on a fee basis) if required by the user.

Reporting and Analytics

By creating a 360° view of an event, Eventuosity allows planners and managers to gain deeper insight to their projects. Our built-in reporting tools provide the mechanism for users to extract event data for further analysis in order to identify cost savings, optimize utilization of resources, review staffing, and determine trends that may be strategically important to their business. Eventuosity reporting also gives users a way to easily create commonly required documentation for their event such as contact lists and daily schedules.

Access to create and view reports is provided on a permissions basis. Only Event Creators and Admins have permission to run and view reports. Customization and control of Reports permissions is possible (on a fee basis) if required by the user. All reports are exportable in PDF and CSV formats for easy presentation or import to another data analysis tool.

Reports Module

The following sections highlight the functionality of the Reports module.

Upon selecting Reports from the Home Screen or Task Bar, the Reports module will open to provide a series of dropdown selections through which data can be viewed.

Figure 75: Access Reports from the Home Screen or Task Bar

Figure 76: Reports module screen

Select a report category from the dropdown list.

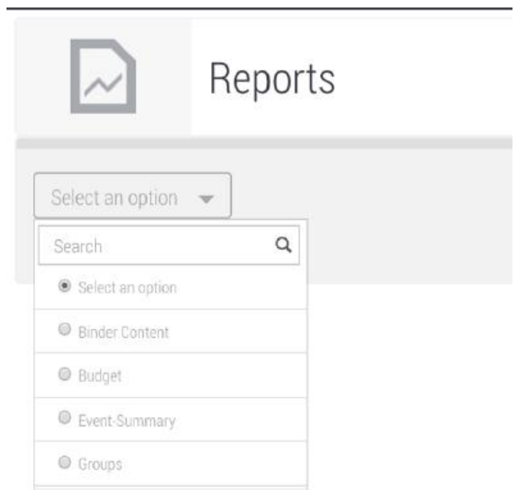


Figure 77: Report category selection determines availability of data below

After selecting the type of report that you will run, Eventuosity will provide lower level drop down options based on available data. Some data elements allow multiple selections. Pre-defined or custom data ranges may also be specified.

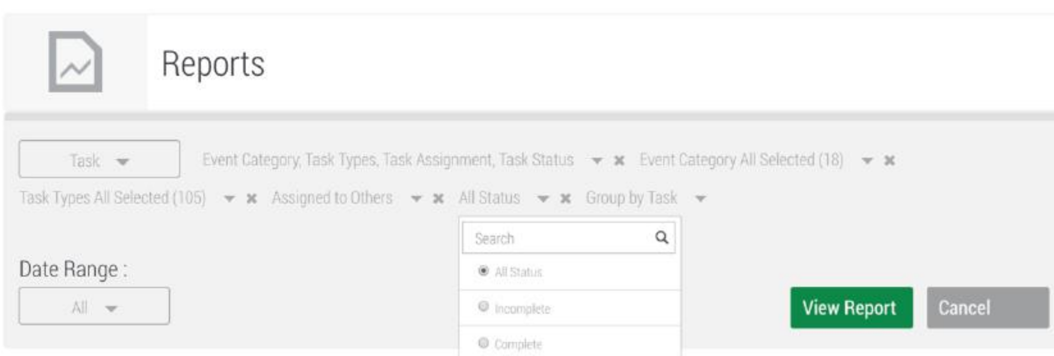


Figure 78: Single or multi-selection are available for certain reporting areas. Radio buttons or checkboxes serve as indicators.

In the example below, we have drilled down to the lowest level of detail available based on selection criteria. A summary of the reported data will be shown in Eventuosity and everything can be exported in CSV or PDF format. PDF exports are pre-formatted to be easily shared with others.

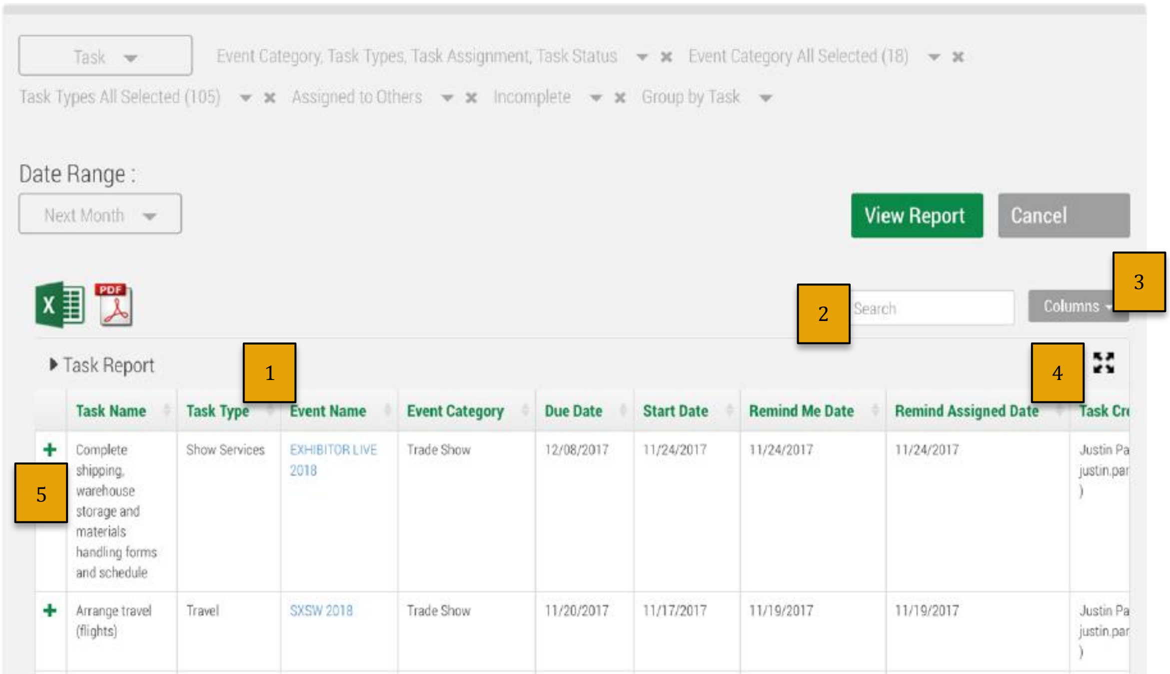


Figure 79: Reports can be viewed in the Eventuosity web app or exported to CSV or PDF

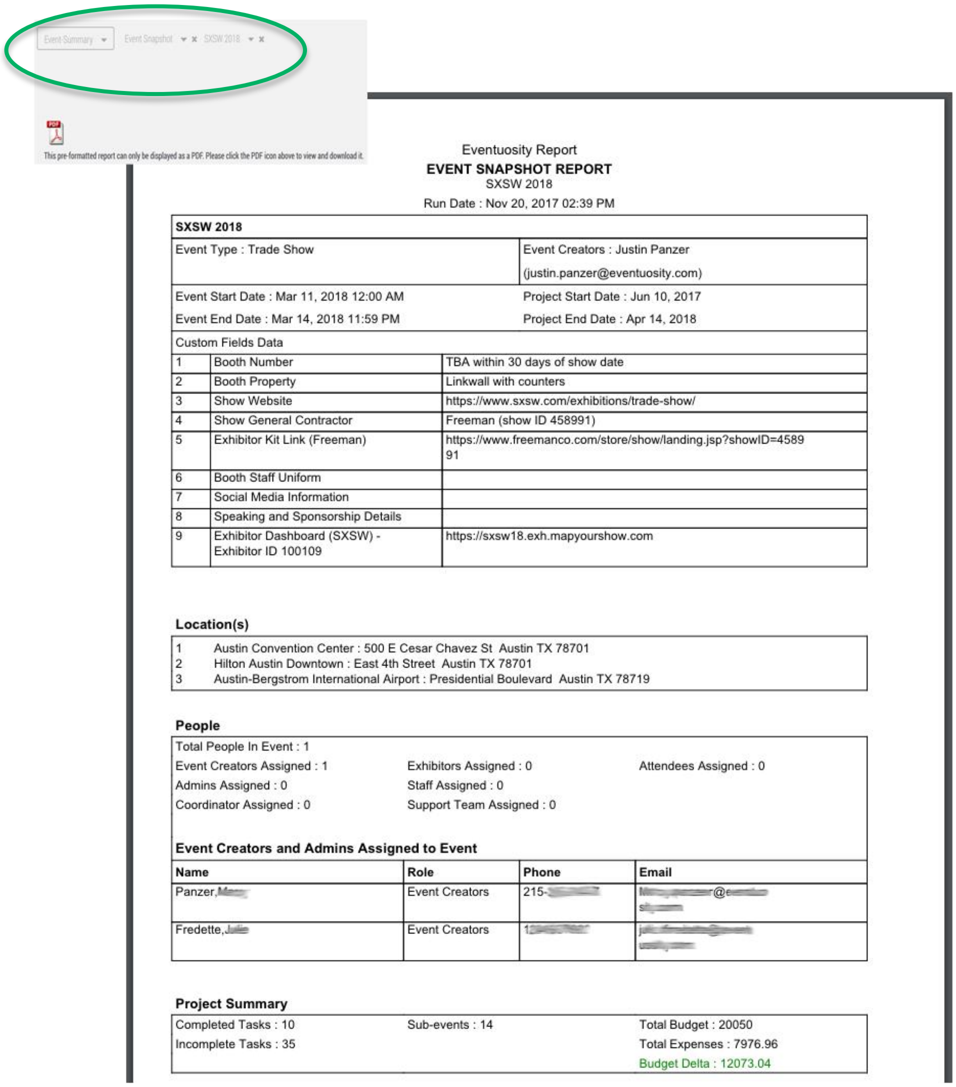
The tabular results in the Reports module include a number of dynamic features.

1. Click any column header to change how your data is sorted.
2. Use the Search Bar on the right to look for specific data in your results table.
3. Use the Columns button to change the layout of your table.
4. Click the Full Screen icon to expand your results in your browser window.
5. Click the + symbol next to any data record to view additional information associated with it.

Given the ability to select different data dimensions in different sequences, dozens of reports are possible in Eventuosity. Custom reporting capabilities are available on a fee basis.

Event and Summary Reports

Also available in the Reports module are a number of pre-formatted reports available in PDF format for quick export and offline viewing. To run those reports, select "Event-Summary" from the dropdown, choose your report, and select the event for which you want to run it. Click the PDF icon that appears below your selections to view the report.



Eventuosity Report
EVENT SNAPSHOT REPORT
SXSW 2018
Run Date : Nov 20, 2017 02:39 PM

SXSW 2018

Event Type : Trade Show	Event Creators : Justin Panzer (justin.panzer@eventuosity.com)
Event Start Date : Mar 11, 2018 12:00 AM	Project Start Date : Jun 10, 2017
Event End Date : Mar 14, 2018 11:59 PM	Project End Date : Apr 14, 2018

Custom Fields Data

1	Booth Number	TBA within 30 days of show date
2	Booth Property	Linkwall with counters
3	Show Website	https://www.sxsw.com/exhibitions/trade-show/
4	Show General Contractor	Freeman (show ID 458991)
5	Exhibitor Kit Link (Freeman)	https://www.freemanco.com/store/show/landing.jsp?showID=458991
6	Booth Staff Uniform	
7	Social Media Information	
8	Speaking and Sponsorship Details	
9	Exhibitor Dashboard (SXSW) - Exhibitor ID 100109	https://sxsw18.exh.mapyourshow.com

Location(s)

1 Austin Convention Center : 500 E Cesar Chavez St Austin TX 78701
2 Hilton Austin Downtown : East 4th Street Austin TX 78701
3 Austin-Bergstrom International Airport : Presidential Boulevard Austin TX 78719

People

Total People In Event : 1

Event Creators Assigned : 1	Exhibitors Assigned : 0	Attendees Assigned : 0
Admins Assigned : 0	Staff Assigned : 0	
Coordinator Assigned : 0	Support Team Assigned : 0	

Event Creators and Admins Assigned to Event

Name	Role	Phone	Email
Panzer,	Event Creators	215-	@
Fredette,	Event Creators	1	

Project Summary

Completed Tasks : 10	Sub-events : 14	Total Budget : 20050
Incomplete Tasks : 35		Total Expenses : 7976.96
		Budget Delta : 12073.04

Figure 80: Event & Summary Reports are pre-formatted for quick export and offline viewing

Snapshot View

Sometimes in the course of planning an event a quick status update is all that is required. In order to meet this need, Eventuosity offers the Event Snapshot View. The Event Snapshot View can be accessed by clicking the event on your Master Calendar or clicking the eye icon under your event on the Events screen.

A pop-up will appear with the latest information about your event including any past due tasks, the next five things on your schedule, and an indicator of budget performance. Graphical elements, coloration, and a consolidation of your most recent or upcoming event data make the Snapshot View a great tool for daily status checks.

Click the Event Name at the top of the Snapshot View to open the full event.

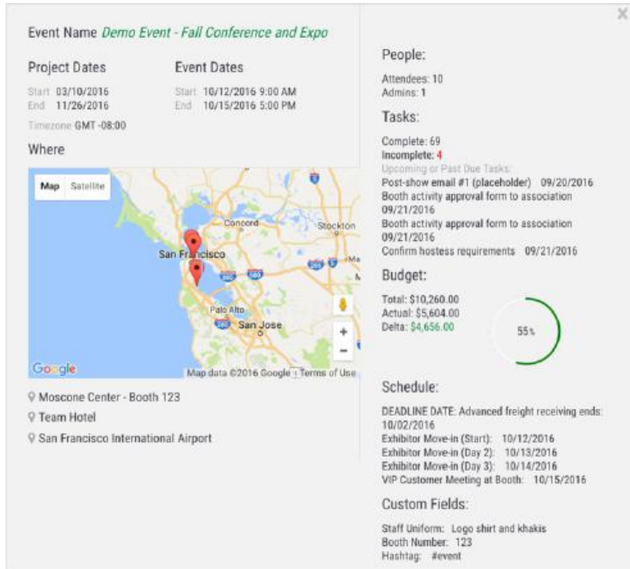


Figure 81: Event Snapshot View is available from Master Calendar and Events

Dashboard

Whether you are managing one or multiple events, there are a lot of moving pieces to keep track of. Viewing those elements in the aggregate can help you to evaluate your events' impact on your team and your business. For a big-picture look at your events, use the Eventuosity Dashboard.

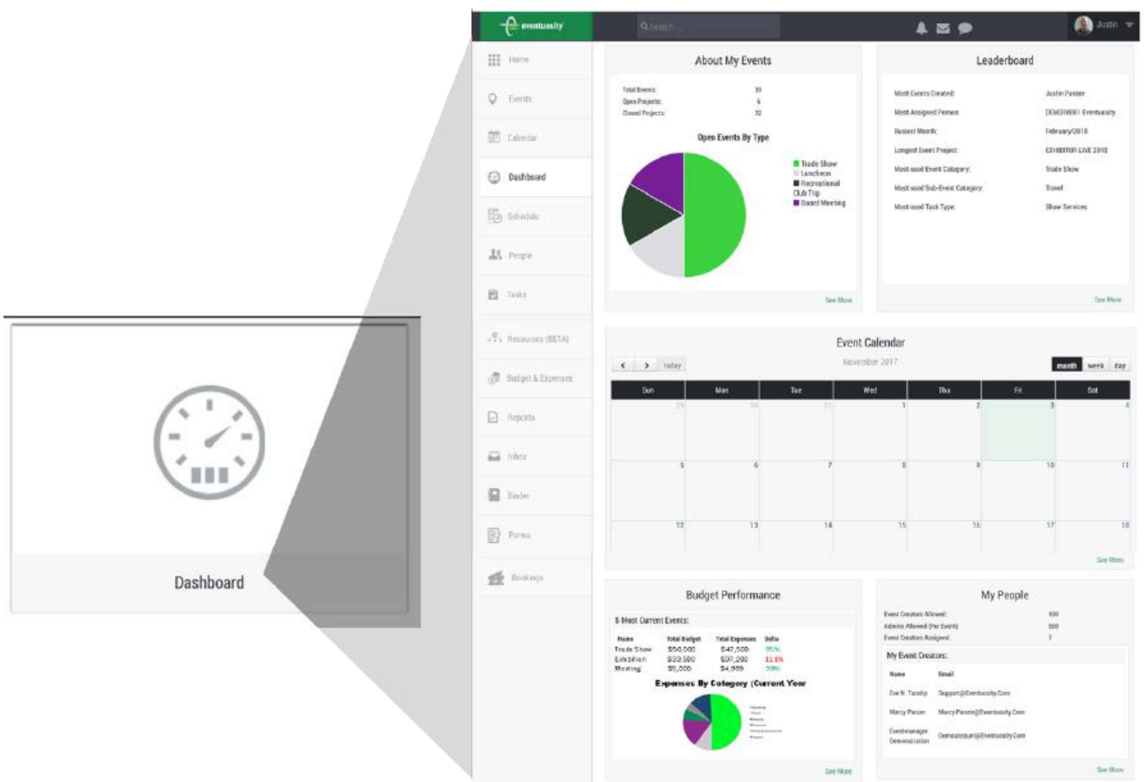


Figure 82: The Eventuosity Dashboard provides an aggregate view of your events and their performance

The Dashboard includes a summary of your events by category, a number of key indicators on projects and staff, a quick look at your Master Calendar, a Snapshot View of your next event, as well as Task, Budget, and People data from across your entire event portfolio.

Inbox

Communication and collaboration are key to event success. Eventuosity takes contact with planning team members, internal staff, clients, vendors/suppliers, or venue management out of multiple inboxes and texts and puts it all in one place. There is no concern about SPAM filters, incompatibility of e-mail clients or audit trails. Every communication about an event can be kept in one place with the same permission-based access that is present throughout Eventuosity.

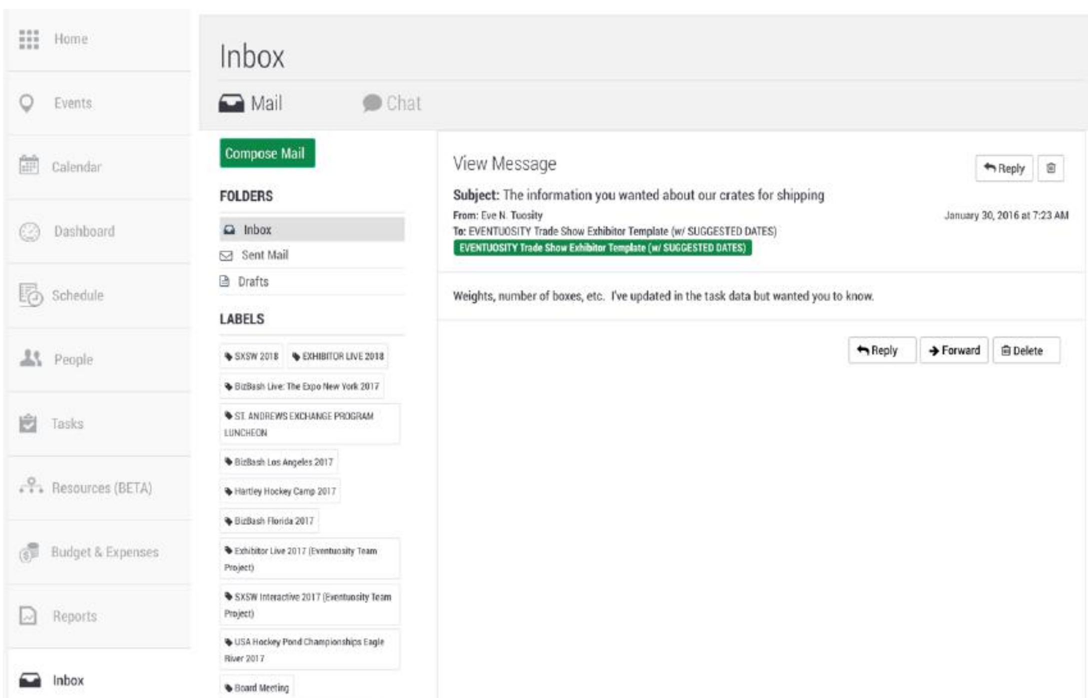


Figure 83: Mail and Chat messaging are available in the Eventuosity Inbox

Messages in Eventuosity can be sent to a single attendee, an attendee group, everyone who is part of an event, only those who are part of a single sub-event or people assigned to a task. Notifications of new messages are received based on the profile settings of the end user. All messages can be tagged with event, task, resource or sub-event data for easy filtering when viewing contents of the inbox.

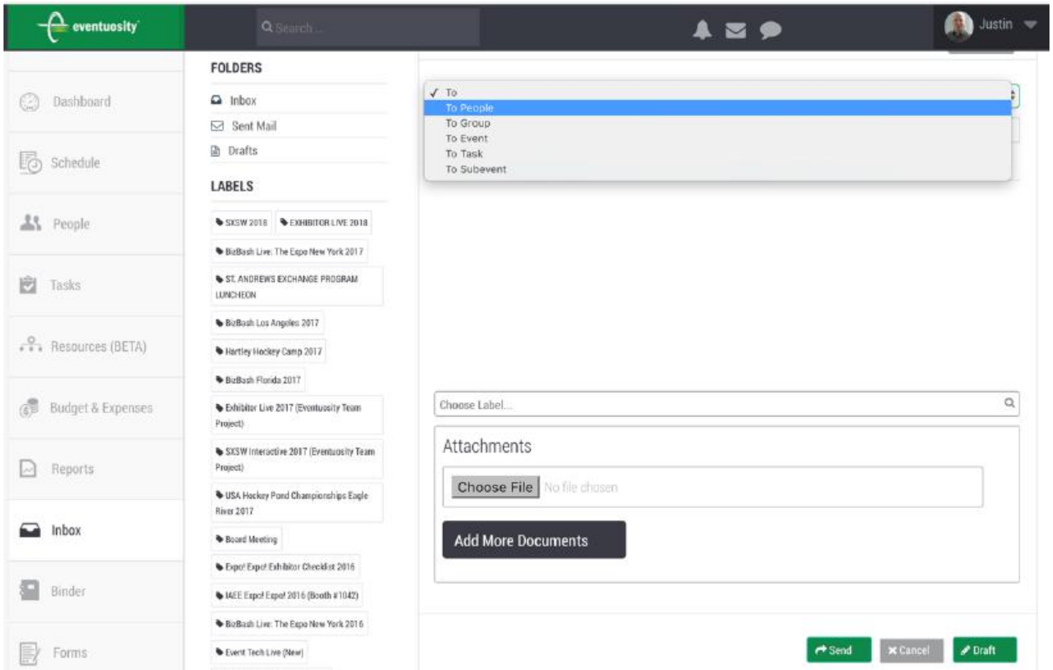


Figure 84: Message recipients can be easily specified

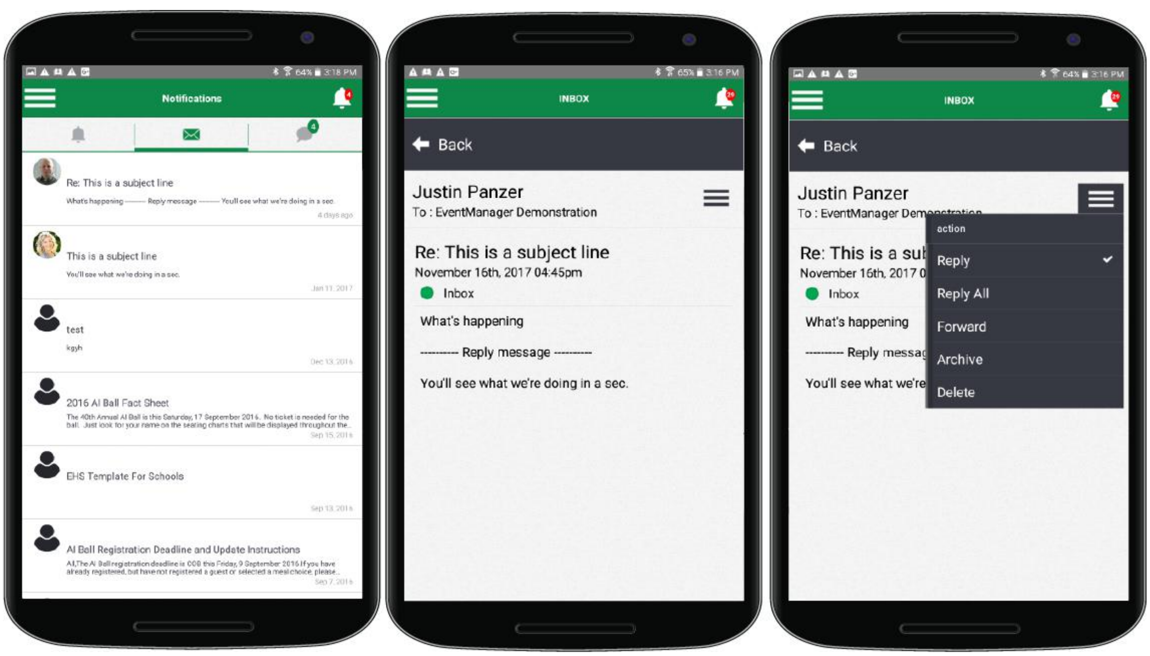


Figure 85: Eventuosity mobile messaging

Mail

Mail messages in Eventuosity are like a standard e-mail. Reply, Forward and Reply All functionality is available and attachments are supported.

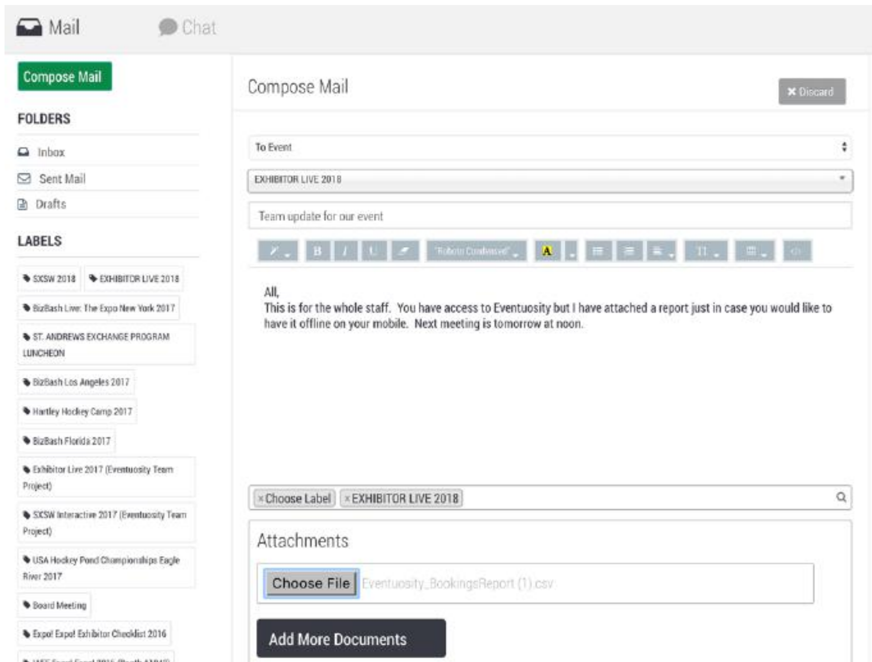


Figure 86: Create mail messages with appropriate tags for filtering

Chat

Chats in Eventuosity are similar to texts or instant messages. Chats are most frequently used for short communications with instant notification between parties. Coordination of on-site logistics is incredibly easy with Chat.

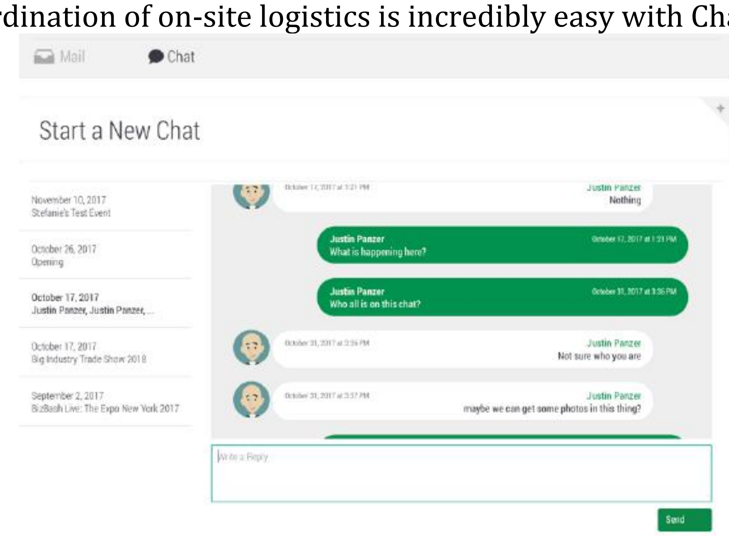


Figure 87: Chat messages for quick communication between event participants

Chat can also be accessed by clicking a conversation under the chat bubble icon in the Message Center. This will open the selected chat in a window on the lower, right side of your browser's screen.

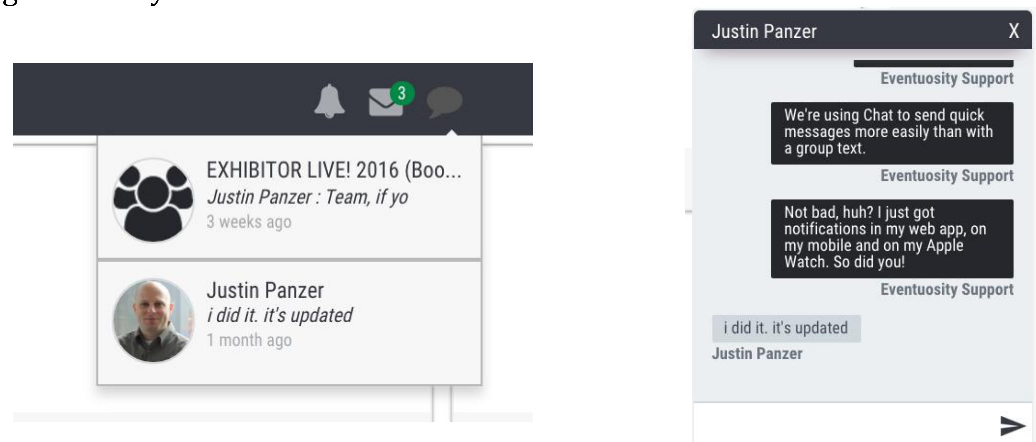


Figure 88: Click the chat bubble icon in the Message Center to open an Eventuosity Chat window in your browser

Forms

In many event types, organizers require participants to self-populate data to be used in planning the program. To support this requirement, Eventuosity provides users with the Forms module. This module allows for easy creation of online forms by the user through which staff, volunteers, guests, or other participants may submit information. Forms are displayed in an iframe that may be included in any web page.

Prior to creating a form, an event must be created. To see a list of active events with which forms may be used, select Forms from the Home Screen or Task Bar.

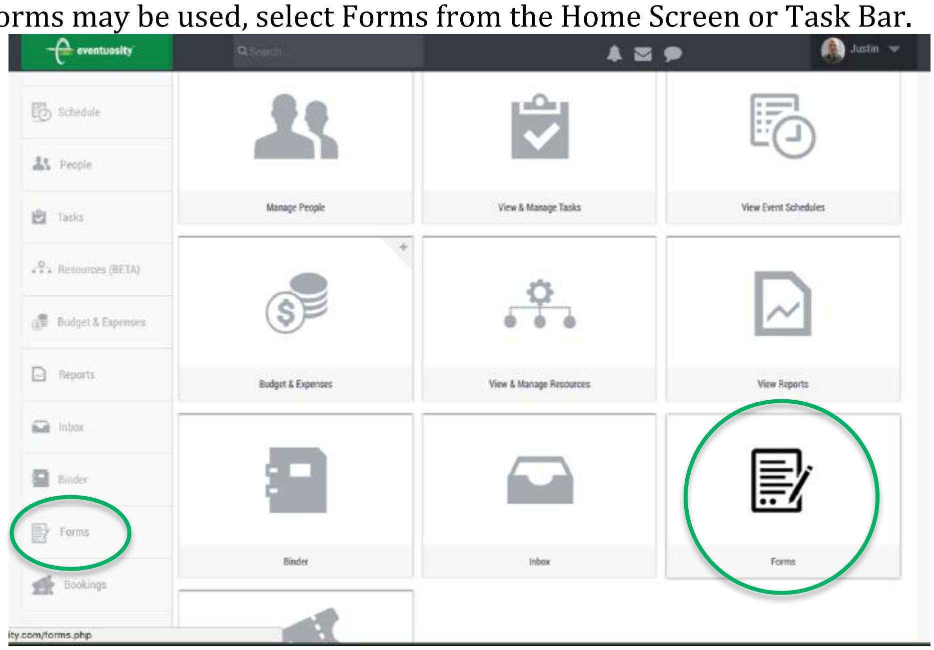


Figure 89: Select Forms to open a list of active events for which forms may be created

Click on an event to reveal the Create Form button and click to begin building your form.

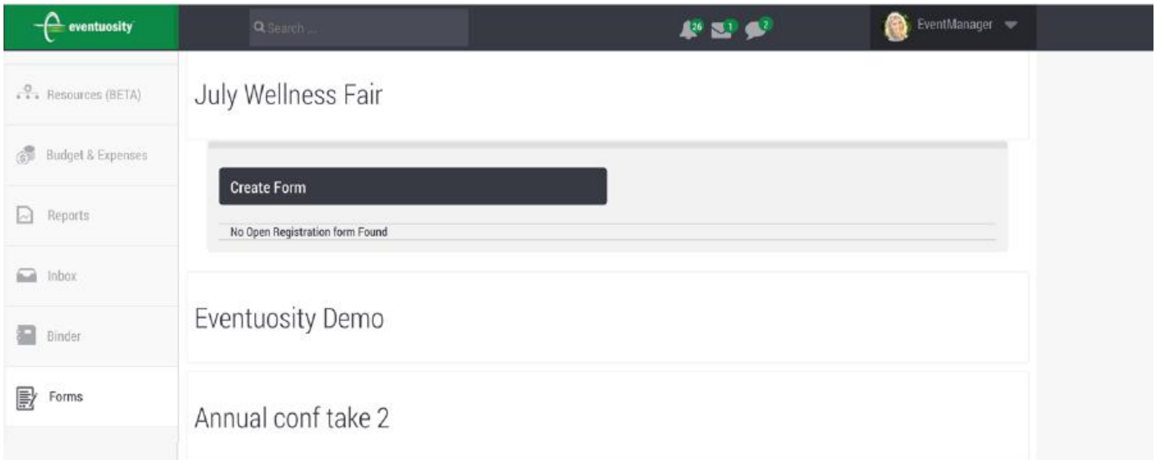


Figure 90: Selecting an event in the Forms module reveals form builder options

The most frequently utilized form type is Registration. The steps below provide instruction on using the Registration functionality of Eventuosity.

Manage Basic Information Form Fields

Required fields such as email, first name and last name will be pre-selected. Users may check other standard fields such as address and phone number that request registrants to submit general personal data.

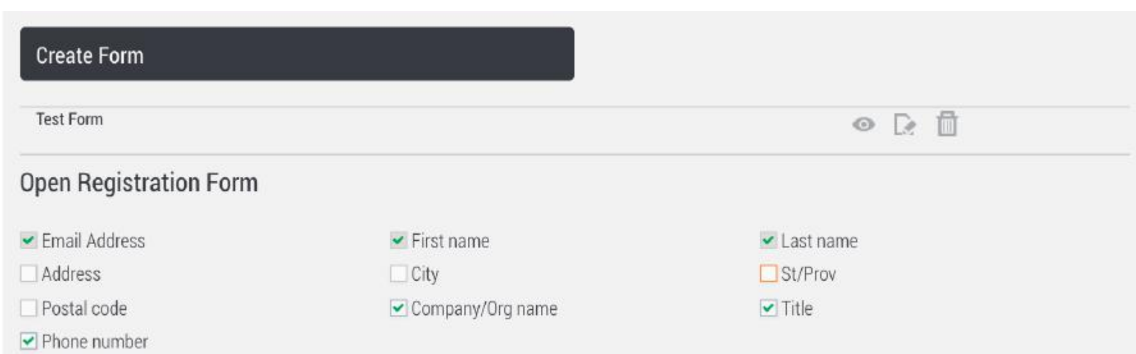


Figure 91: Select basic information fields to be included in your form

Manage Custom Form Fields

Next, users may add any number of custom fields. In the case of fields that require a dropdown selection, enter selections in the Value field separated by commas. Each custom field has a check box next to it with which the Eventuosity user can make those fields required by registrants.

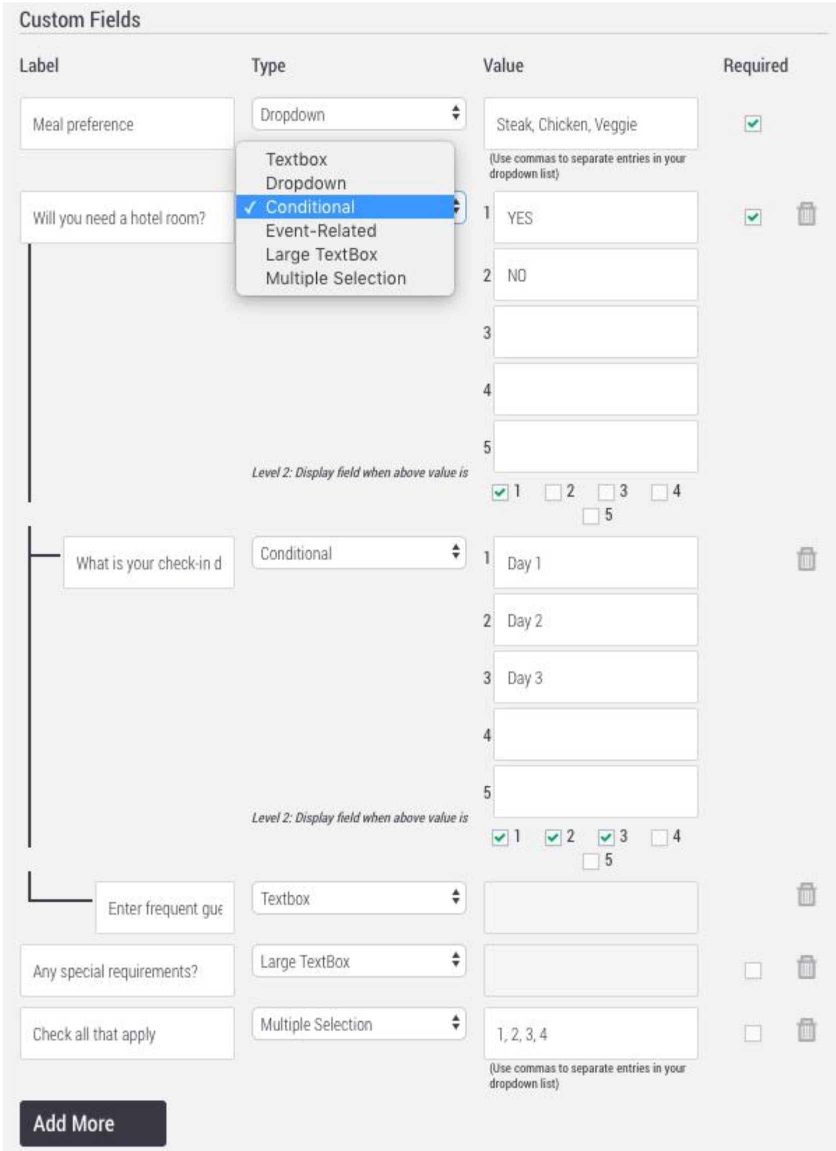


Figure 92: Add custom fields to your form

There are six field types that may be used as custom fields in a registration form. They are:

- Conditional – Dynamic presentation of form fields are based on responses provided by the user. Up to three levels are permitted under a Conditional field.
- Dropdown – Registrants may select one response from a list of choices. To create the list, separate values with commas.
- Event-Related – Offer registrants the option to submit their registration data for multiple events at once. Check the events that you would like presented in the list.
- Large Textbox – Registrants may provide a response to a question using up to 250 characters.

- Multiple Selection – Registrants may select multiple choices from a list. Create the list by separating values with commas.
- Textbox – Registrants may provide a response using one or a few words only.

Specify Form Name and Location

Enter the full domain on which the form will be made available for access by potential registrants. Once the user completes the entry in this field, the domain will be validated to ensure the form will work properly based on what data has been entered.

Then provide a name under which your form will be saved.

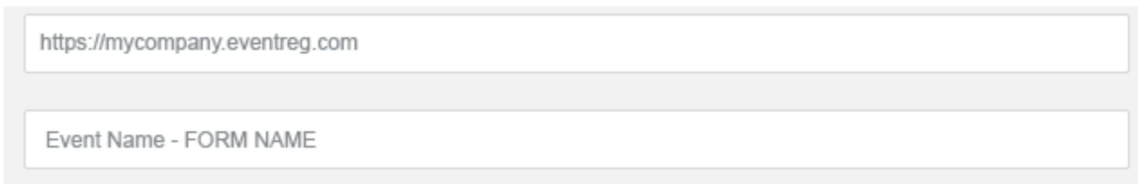


Figure 93: Specify a form name and a web location for it to be viewed by registrants

More Forms Options

Several additional options are available when creating a registration form.

Figure 94: Advanced registration features

1. **Require user to set a password** – Registrants will be required to create a password when using your form for the first time. This will allow them to get back into Eventuosity to manage their reservation or manage assignments that you make for them.

2. **Receive notifications for this form** - Choose to be notified by email of each registration. If this box is not checked, the Eventuosity administrator will NOT receive notifications when someone registers for their event.

3. **Sync with Marketo –** Pass registration data from Eventuosity to your Marketo leads database. Marketo credentials must be entered in My Account. See the related Appendix for configuring your Eventuosity/Marketo integration.

4. **Enable Ticketing –** Create paid or free tickets to your event. Selecting this option will open the Manage Ticket Types dialog. Tickets may be of various types, may be limited in quantity, and may include multiple “seats” per ticket. To accept payments, you must first enter credentials for an approved payment processor (such as PayPal or Stripe) in My Account.

When Ticketing is enabled, the form creator is given additional options to determine what information will be presented in the iframe form. The first option allows the user to remove all payment fields for any non-paid ticket types that will be selectable in a registration form. No sub-total fields will be shown when the registrant selects a ticket type that has no associated fee.

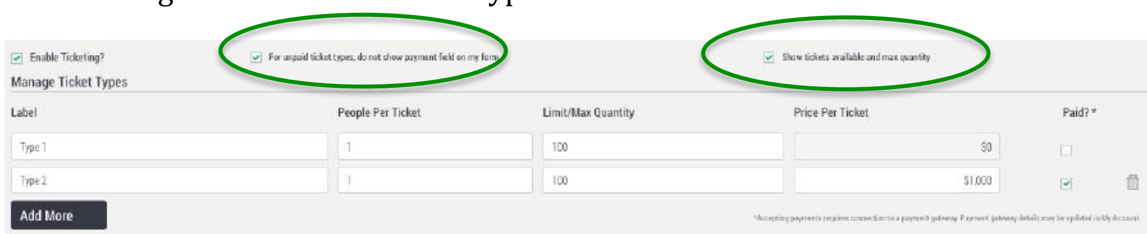


Figure 95: Ticketing Options

The second option allows the form creator to show registrants how many tickets are still available in their event. In a situation where a maximum number of any ticket type is specified, a registrant may see the quantity of that type that remains for registration/purchase.

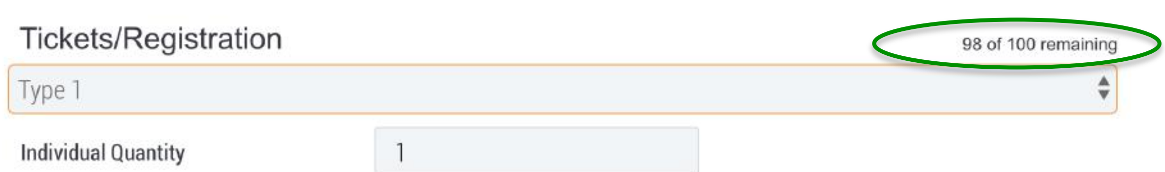


Figure 96: Show available and remaining ticket quantities

5. **Customize acknowledgement email –** Each registrant will receive an email confirming their registration. You may specify what is included in this notification. Selecting this option will open the WYSIWYG message editor where you may create and design the custom message. Several variables may

be added to the confirmation email in order to include event data in the message body. Variables are:

- ##USER_NAME## - the name of the registrant to whom the event notification is being sent
- ##EVENT_NAME## - the name of the event for which the person is registering
- ##EVENT_NAME_WITH_LINK## - the name of the event with a hyperlink to its record in Eventuosity
- ##AMOUNT## - the total amount to be charged if using Ticketing
- ##EVENT_INFO## - includes event name with link to Eventuosity, date/time, location with link to Google Maps
- ##LOGIN_HERE## - Link to Eventuosity login screen. Use when not using Consolidated Event Information.
- In addition to the Event and People-related merge fields, the following merge fields may be included in an acknowledgement email to registrants:
    - ##TICKET_NAME## - The label given to the ticket type(s) that was selected by the registrant
    - ##TICKET_MAX_LIMIT## - Information related to the maximum number of a particular type still available. This is the same information presented to the registrant in the iframe form.
    - ##CUSTOM_FIELDS## - Allows the form creator to specify which registration form data will be presented to the registrant as a confirmation of their selections. This requires selection of "In email?" for at least one custom field in the form builder.

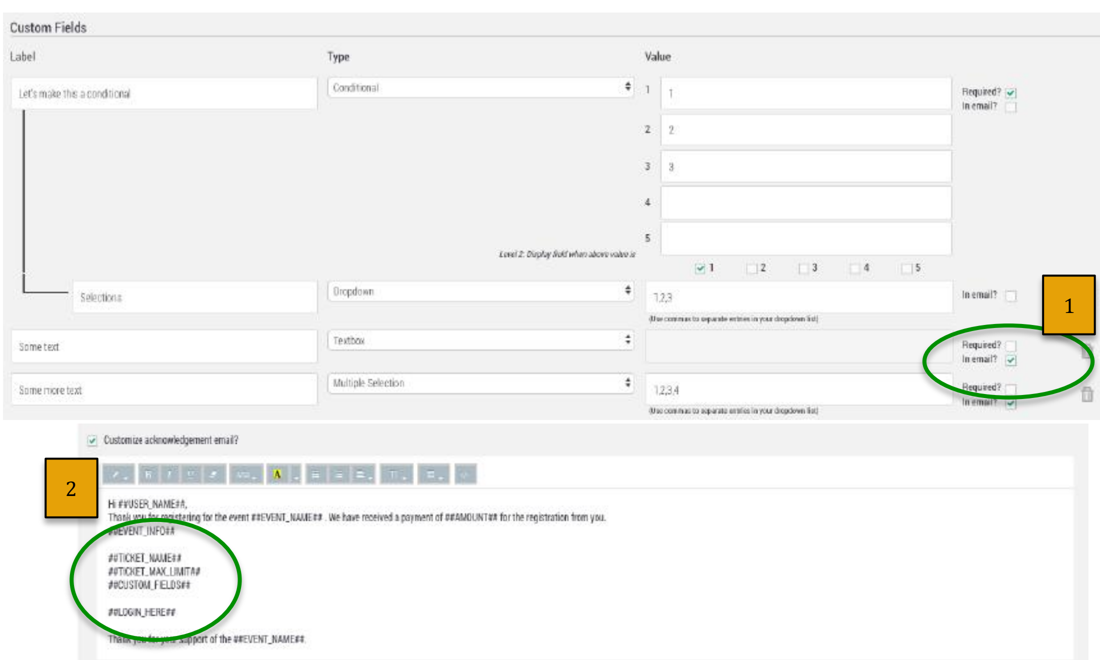


Figure 97: Select Custom Fields to be displayed in confirmation emails

6. **Send consolidated info in email** – Includes default links to Eventuosity in the confirmation email to registrants. This feature is suggested for advanced users only.

7. **Accept donations through this form** – Perfect for non-profit organizations and others raising money through events. Selecting this option will add fields to your registration form for a donation amount and detail to be submitted. Again, connection to a payment gateway is required.

View Form Information

Click Save to confirm all of your form fields and your form options. Below the Save button, you will then see information related to your form's presentation on a web page.

Each time the iframe in which your form is presented is seen, the view counter will be updated. Each time someone enters all required form data and clicks the Submit button, the registered counter will be updated.

The above are enabled using the iframe code that is provided when your form is saved. This code is used to create the iframe on your web page. Once it is added to your page, any updates to your form will be made in real-time. There is no need to re-publish the code to your page. For assistance with iframe code, please contact Eventuosity.

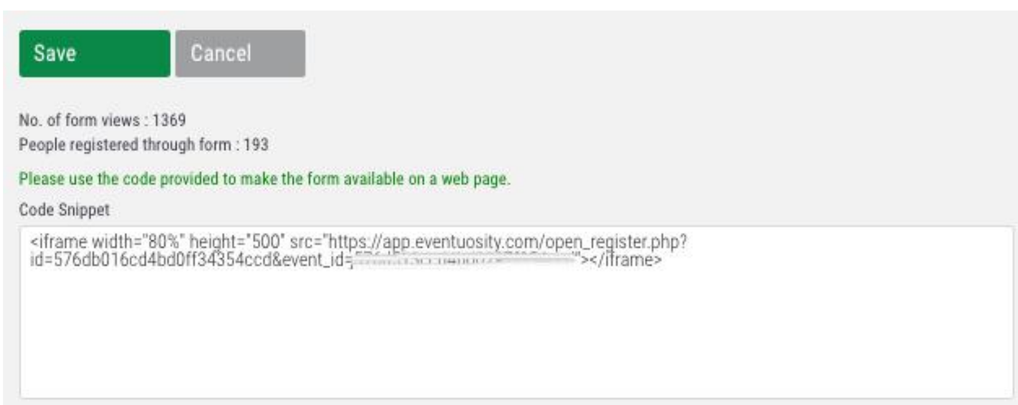
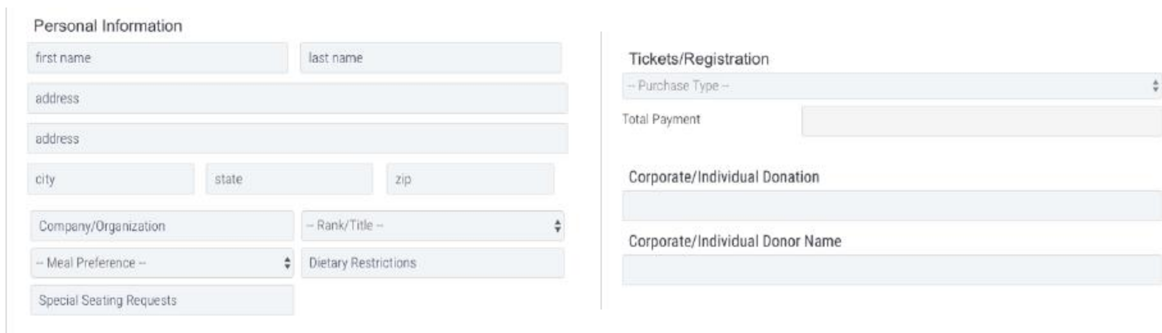


Figure 98: Use HTML code snippet to make your form available in an iframe on any webpage

After the code for the validated domain is added to the event web page, the registration form will be available for use by event participants. An example is shown below.



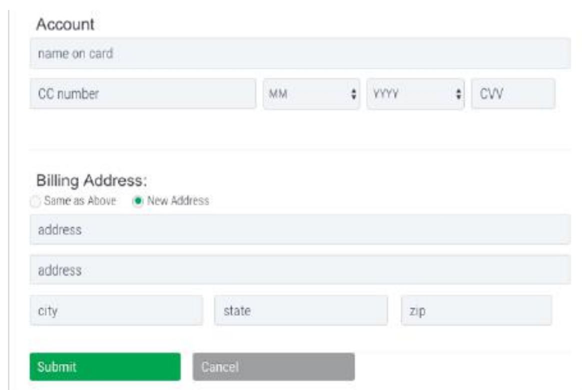
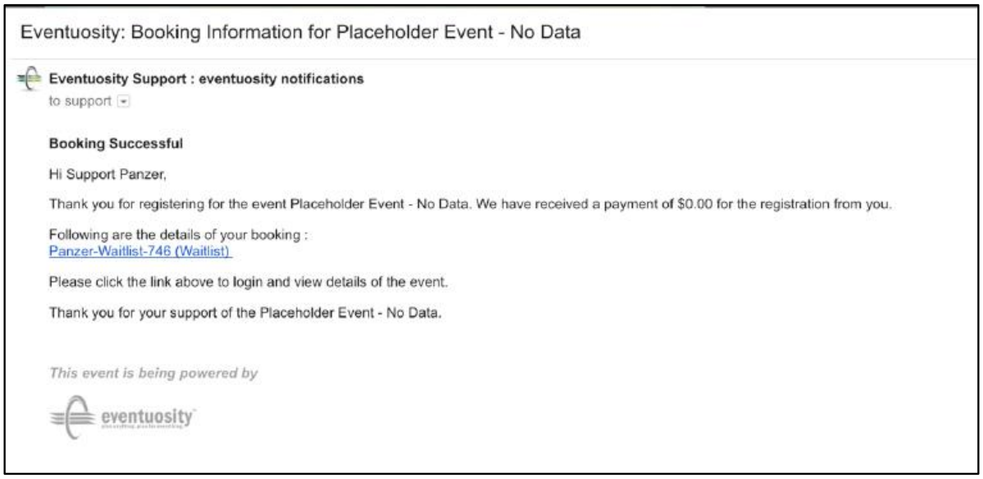


Figure 99: Example registration form. Forms can be made available on any validated website.

Registrant Management

Each person who enters their data through an Eventuosity registration form will be added to your Confirmed People in the related event and receive a confirmation notification.

Figure 100: Confirmed People list populated through Open Registration



Eventuosity: Booking Information for Placeholder Event - No Data

Eventuosity Support : eventuosity notifications
to support

Booking Successful

Hi Support Panzer,

Thank you for registering for the event Placeholder Event - No Data. We have received a payment of $0.00 for the registration from you.

Following are the details of your booking :
Panzer-Waitlist-746 (Waitlist)

Please click the link above to login and view details of the event.

Thank you for your support of the Placeholder Event - No Data.

This event is being powered by

eventuosity

Figure 101: Example confirmation email sent to registered attendee

If you have chosen to receive notifications of bookings, you will also receive an email with the registrant's data.

Eventuosity Support via eventuosity Nov 2
to me

Attendee Registered

Dear Justin Panzer,

A new user Justin Panzer (justinp@noemail.com) has registered as an attendee in *Canadian Special Events 2017* using the Open Registration form. Please click here to login and view details of the event.

...

This event is being powered by

eventuosity

Figure 102: Example confirmation email sent to Event Creator

If Ticketing is enabled, registrants may edit their registration details. Users may click a link in their notification email or enter eventuosity.com/bookings.php into their Web browser to access the Eventuosity Bookings module.

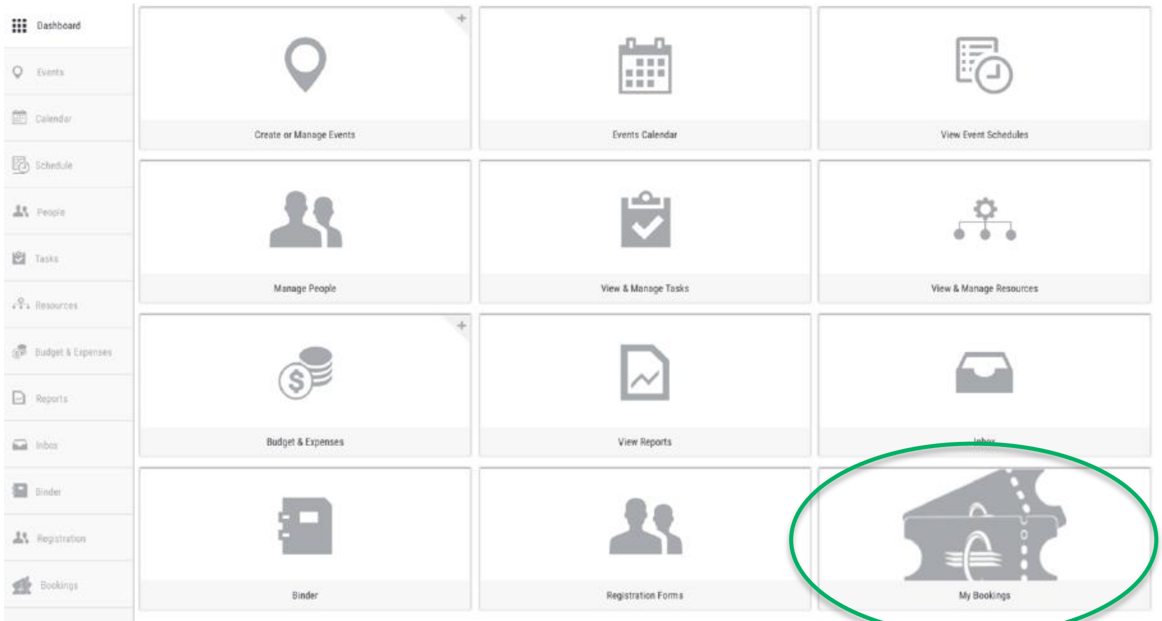


Figure 103: Ticketed registrants may access the Eventuosity Bookings module

The Bookings Module gives registrants access to their ticketing profile, allowing them to add preferences, guests, or other data required in order to manage your event.

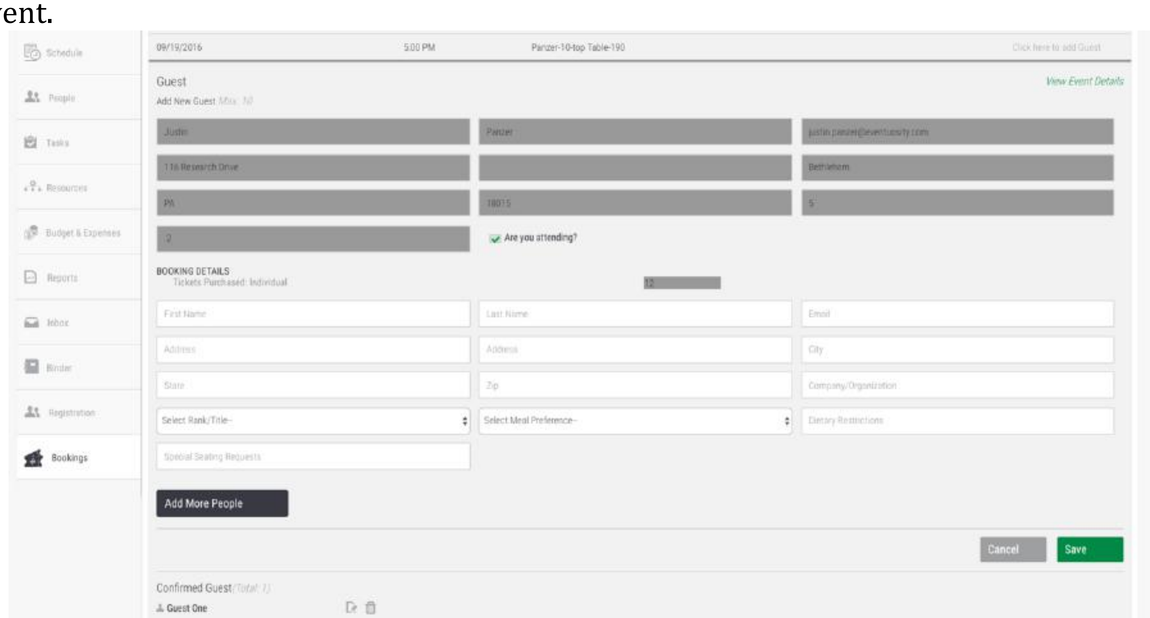


Figure 104: Bookings module view

Event administrators can view and edit participant data which includes all information submitted through the form.

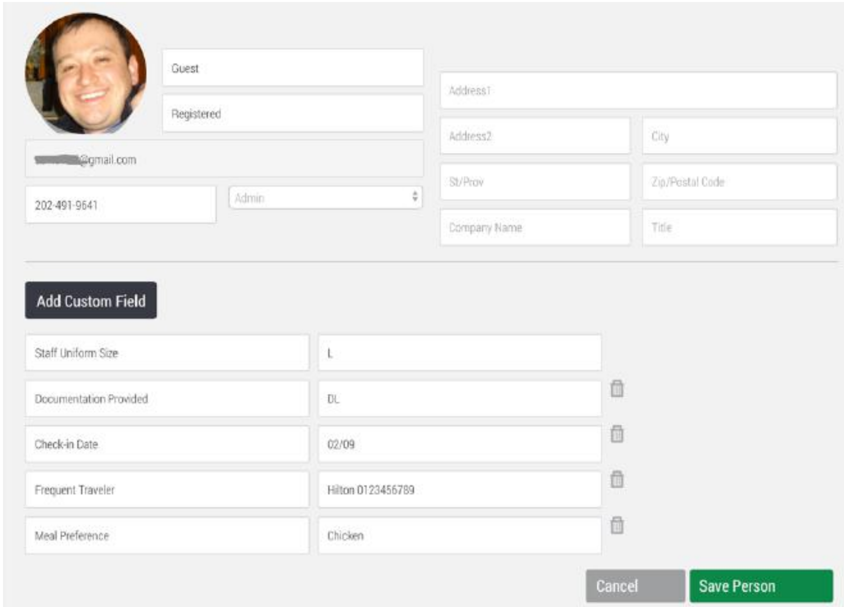


Figure 105: Single Attendee view includes all data submitted through Registration form

To view or edit the form at any time, or to see updated view and submit counts, return to the Registration module and select the appropriate event from the dropdown list.

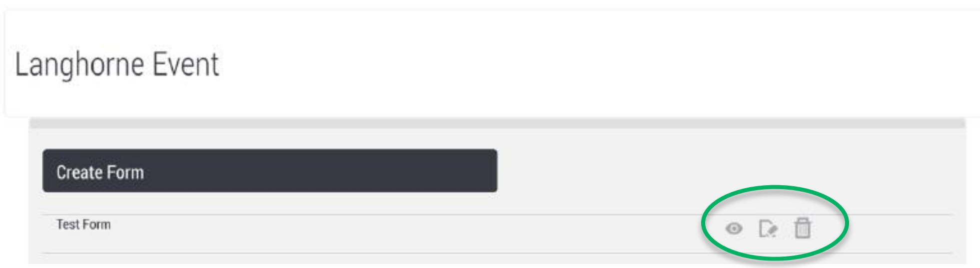


Figure 106: Update a Registration form at any time

Additional customizations are available upon request. Registration customizations may include connection to a payment gateway, hosting of a registration site, landing page design, and more.

Additional Product Information and Support

More support resources and product information are available online at the following locations:

[Eventuosity Homepage (eventuosity.com)](eventuosity.com)
[Eventuosity Support Page (eventuosity.com/support)](eventuosity.com/support)
[Eventuosity Resources Library (eventuosity.com/library)](eventuosity.com/library)
[Eventuosity YouTube Channel (http://www.youtube.com/user/eventuosity)](http://www.youtube.com/user/eventuosity)

Appendix A – Roles and Permissions

	(Enterprise) Master User	Event Creator	Administrator
Scope	Account-wide	Account-wide	Per Event
General	- Account owner. - Full create, edit, delete capabilities and ability to assign others to roles. - Will have view of Super-Administrator data in Enterprise level accounts	- Event creation and edit capability. - Can delete own events and perform all tasks under events to which they are assigned by Master User. - Only available in Enterprise accounts. - May change notification settings	- Assist Master User and/or Super-Administrator with event management functions. - Cannot create or delete events. - Must be given Admin rights to then make assignments and edit project data. - Full view of all event data but limitations on editing and deleting (specified below) - May change notification settings
Event Creation	Yes	Yes	No
What, When, Where	Full read/write capability.	Full read/write capability	- Cannot change basic what, when, where - May add and edit custom fields data to WHAT - Can add locations - Can update location data but not delete locations added by higher-level user or admin
People	- Add, edit, delete. - Add custom fields and data. - May edit or remove people in event that were added by someone else. - Create groups. - May assign roles - People and Groups of SA and Admin are accessible for assignment. People and groups of others are not editable	- Add, edit, delete People from own database in event. - May add and remove People and/or groups from Master User DB. Edits only in the event - Edit People to an Event that were assigned by another User. - Add custom fields and data for People - Create groups. - May assign roles - People and Groups of Master User and Admin are accessible for assignment. People and Groups of others are not editable	- Can add People that are in both own and event creator's database. May then edit or delete them from event. - Can add and edit custom data for People added to event by another user. Assist in managing custom data fields that are required for all People - Cannot delete People added by another user - People and Groups of Master User and SA are accessible for assignment. People and Groups of others are not editable

	(Enterprise) Master User	Event Creator	Administrator
Tasks	- Full read/write and assignment capability. - May mark tasks complete or incomplete on behalf of another user	- Full read/write and assignment capability. - May add and edit assignments for tasks created by Master User and Admin. - May send task reminders.	- Full view of tasks - Assignment of tasks is permitted for all tasks. - May create new tasks and assign. - Cannot delete tasks added or assigned by others but may add people to any task. - May send task reminders. - May mark tasks complete on behalf of another user.
Schedule	- Full read/write and assignment capability for all sub-events regardless of creator	- Full read/write and assignment capability for all sub-events regardless of creator	- View all subevents created by other users under event - Assign available People to any sub-event, including those created by others - May edit locations of any sub-event - Create and assign new sub-events
Budget	- Create budgets - View, edit or delete all budget data and expense or revenue entries - May upload expense and revenue items	- Create budgets - View, edit, or delete all budget data and expense or revenue entries - May upload expense and revenue items	- View entire budget detail - Add expense and revenue items - Cannot edit or delete budget line items - Cannot add budget line
Resources	- Full read/write and assignment capability - Add, edit, delete Resources	- Full read/write and assignment capability - Add, edit, delete Resources	- Full read/write and assignment capability - Add, edit, delete Resources
Binder	- See above rows for specifics of binder access associated with different modules. - May manually create or delete Binder folders - Add files or links to any Binder folder - View and access all Binder contents	- See above rows for specifics of binder access associated with different modules. - May manually create or delete Binder folders - Add files or links to any Binder folder - View and access all Binder contents	- See above rows for specifics of binder access associated with different modules. - Full binder access - Cannot delete binder folders created by another user - Can create and delete own binder folders
Reports	Full reporting capability with no restrictions	Full reporting capability with no restrictions	Full reporting capability with no restrictions

	(Enterprise) Master User	Event Creator	Administrator
Inbox	- Create and send Mail or Chat messages to any event or account-level contact - Create, edit, delete draft messages - Assign draft messages to events	- Create and send Mail or Chat messages to any event or account-level contact - Create, edit, delete draft messages - Assign draft messages to events	- Create and send Mail or Chat messages to any event or account-level contact - Create, edit, delete draft messages - Assign draft messages to events
Snapshot View	Full view of Snapshot data with no restrictions	Full view of Snapshot data with no restrictions	Full view of Snapshot data with no restrictions
Examples	- Event producer - Senior event, marketing, sales staff - IT or other internal central service	- Department head - Meeting or event planner/ producer. - Training manager - Exhibit house project manager or client account manager - Exhibitors	- Trade show booth captain - On-site event coordinators - Organizing Team members - Client point-of-contact - Agency point-of-contact - Exhibitors - Administrative Assistants

	Staff Member	Support Team	Attendee
Scope	Per Event	Per Event	Default
General	- Able to VIEW most event data but limited to their assigned items for edit capability. - Restrictions apply on budget, documentation and reporting. - Can be assigned but cannot make assignments	- No create, edit or delete capability. - Able to view entire schedule of sub-events. - No budgeting or reporting capability. - Can be assigned but cannot make assignments	- Default role. Read-only capability. - May add notes and files in tasks to which they are assigned. - Very limited access to project data if not directly applicable.
Event Creation	No	No	No
What, When, Where	- Read only - WHAT custom fields are read only - Cannot add or change location data. May view and get directions.	- Read only - WHAT custom fields are read only - Cannot add or change location data. May view and get directions.	- Read only - WHAT custom fields are read only - Cannot add or change location data. May view and get directions.
People	- Read only. - Able to see names, email and organization of all People in an event. - May contact other people	- Read only. - Able to see list of people in event but not open their record. - May contact Admins and above only	- Read only. - Able to see list of people in event but not open their record. - May contact Admins and above only

	Staff Member	Support Team	Attendee
Tasks	- See and respond to tasks assigned to them - Cannot see tasks to which they are not assigned - May edit notes field in their assigned tasks - May attach files or links to assigned tasks - May mark assigned tasks complete and back to incomplete - May view binder folder contents for assigned tasks. - May not view binder folder contents of tasks not assigned to them	- See and respond to tasks assigned to them - Cannot see tasks to which they are not assigned - May edit notes field in their assigned tasks - May attach files or links to assigned tasks - May mark assigned tasks complete and back to incomplete - May view binder folder contents for assigned tasks. - May not view binder folder contents of tasks not assigned to them	- See and respond to tasks assigned to them - Cannot see tasks to which they are not assigned - May edit notes field in their assigned tasks - May attach files or links to assigned tasks - May mark assigned tasks complete and back to incomplete - May view binder folder contents for assigned tasks. - May not view binder folder contents of tasks not assigned to them
Schedule	- View entire list of sub-events - Export My Schedule is possible - View and update binder folder contents for any assigned sub-event	- View entire list of sub-events - Export My Schedule is possible - VIEW ONLY binder folder contents for any assigned sub-event	- View entire list of sub-events - Export My Schedule is possible - VIEW ONLY binder folder contents for any assigned sub-event
Budget	- Can upload expenses and revenue items into budget categories but cannot view entire budget or see allocations - Cannot make any edits or update to budget - Can only see expense and revenue documents that they uploaded.	- No budget view - No budget folder contents view	- No budget view - No budget folder contents view
Resources	- May view full list of Resources assigned to the event and see their total allocations - No Resource add, edit, or delete - May add to notes or binder of Resources to which they are assigned	- May only view Resources to which they are assigned - May view binder contents of Resources to which they are assigned - May not add any attachments or notes to Resources - NO EDITING	- May only view Resources to which they are assigned - May view binder contents of Resources to which they are assigned - May not add any attachments or notes to Resources - NO EDITING

	Staff Member	Support Team	Attendee
Binder	- See above rows for specifics of binder access associated with different modules. - Access to binder folders for any item to which they are assigned - Cannot create or delete binder folders	- See above rows for specifics of binder access associated with different modules. - Access to binder folders for any item to which they are assigned - Cannot create or delete binder folders	- See above rows for specifics of binder access associated with different modules. - Access to binder folders for any item to which they are assigned - Cannot create or delete binder folders
Reports	- Reporting provides access only to accessible data and own assignments a) All sub-events b) My sub-events c) Contact list in an assigned event d) My People contact list and full data report e) My Tasks - open and complete f) My Resources - No budgeting reports - No binder contents reports - No Event full data report	- Reporting provides access only to accessible data and own assignments a) All sub-events b) My sub-events c) My People contact list and full data report d) My Tasks - open and complete e) My Resources - No budgeting reports - No binder contents reports - No Event full data report	- Reporting provides access only to accessible data and own assignments a) My sub-events b) My People contact list and full data report c) My Tasks - open and complete d) My Resources - No budgeting reports - No binder contents reports - No Event full data report
Inbox	- Create and send Mail or Chat messages to Admin, SA and Master User only - No Reply All to any message received under and event - May view Draft messages if tagged to an event in which they are Staff - May send messages to anyone in own Eventuosity People database	- Create and send Mail or Chat messages to Admin, SA and Master User only - No Reply All to any message received under and event - No access to Drafts - May send messages to anyone in own Eventuosity People database	- Create and send Mail or Chat messages to Admin, SA and Master User only - No Reply All to any message received under and event - No access to Drafts - May send messages to anyone in own Eventuosity People database
Snapshot View	- Snapshot view does not include Project Dates - No budget status view - All sub-events included - Only assigned tasks included - Custom WHAT fields included	- Snapshot view does not include Project Dates - No budget status view - All sub-events included - Only assigned tasks included - Custom WHAT fields included	- Snapshot view does not include Project Dates - No budget status view - Only assigned sub-events included - Only assigned tasks included - No custom WHAT fields

	Staff Member	Support Team	Attendee
Examples	- Trade show booth staff - Internal company members supporting events - Volunteers - Administrative Assistants	- Vendors and suppliers - Venue management - Facilities staff - Service providers	- Ticketed/registered guests - Customers - Trainees - Visiting executives - Contributors - Anyone with an information-only role in event

	Exhibitor
Scope	Per Event
General	- No create, edit or delete capability. - Able to view entire schedule of sub-events. - No budgeting or reporting capability. - Can be assigned but cannot make assignments
Event Creation	No
What, When, Where	- Read only - WHAT custom fields are read only - Cannot add or change location data. May view and get directions.
People	- No view of other Exhibitors. May see Admin and above for contact purposes - May contact Admins and above only

	Exhibitor
Tasks	- See and respond to tasks assigned to them - Cannot see tasks to which they are not assigned - May edit notes field in their assigned tasks - May attach files or links to assigned tasks - May mark assigned tasks complete and back to incomplete - May view binder folder contents for assigned tasks. - May not view binder folder contents of tasks not assigned to them
Schedule	- View entire list of sub-events - Export My Schedule is possible - VIEW ONLY binder folder contents for any assigned sub-event
Budget	- No budget view - No budget folder contents view
Resources	- May only view Resources to which they are assigned - May view binder contents of Resources to which they are assigned - May not add any attachments or notes to Resources - NO EDITING
Binder	- See above rows for specifics of binder access associated with different modules. - Access to binder folders for any item to which they are assigned - Cannot create or delete binder folders

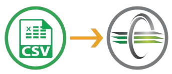
	Exhibitor
Reports	- Reporting provides access only to accessible data and own assignments a) My sub-events b) My People contact list and full data report c) My Tasks - open and complete d) My Resources - No budgeting reports - No binder contents reports - No Event full data report
Inbox	- Create and send Mail or Chat messages to Admin, EC and Master User only - No Reply All to any message received under and event - No access to Drafts - May send messages to anyone in own Eventuosity People database
Snapshot View	- Snapshot view does not include Project Dates - No budget status view - Only assigned sub-events included - Only assigned tasks included - No custom WHAT fields
Examples	- Trade show exhibitors

Appendix B – Importing Spreadsheets to Eventuosity

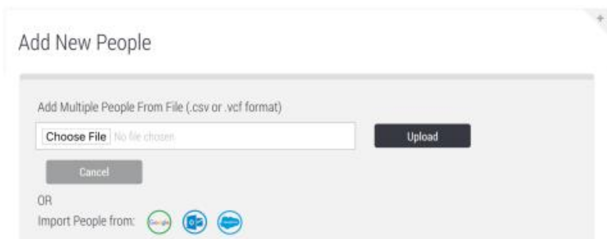
What Can You Import?

Import Events (Projects), People, Tasks, or Schedule from spreadsheets.

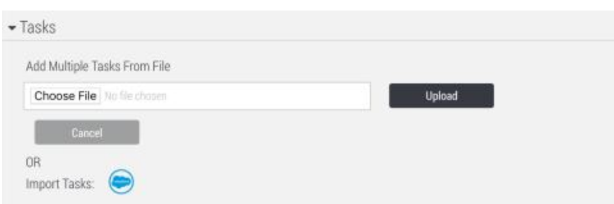
Events may be imported in bulk from the Create or Manage Events module. This functionality is available to assist event managers in moving quickly from spreadsheets to the Eventuosity platform. Start the import by clicking the CSV → Eventuosity icon on the top right of the Events page in the web application.



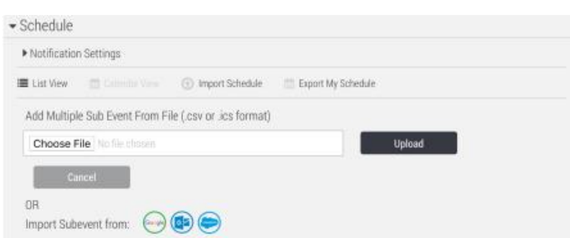
People may be imported in the Manage People module and will be in Available People when you create events and make assignments.



Tasks make up your to-do list and may be imported to any event. Bulk import of Tasks with associated dates will be an important step in creating User Templates (see Eventuosity User Guide for more information on templates).

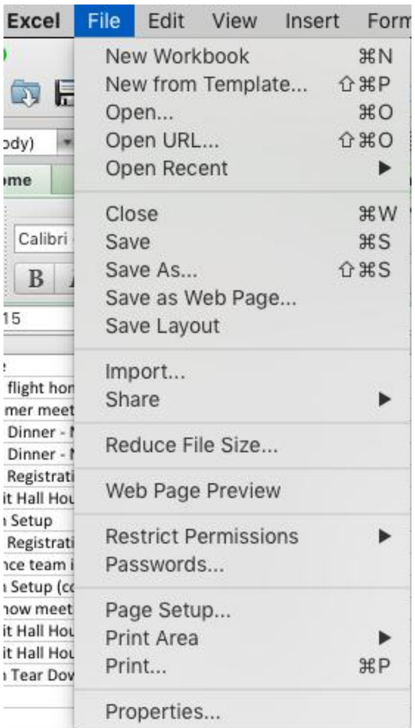


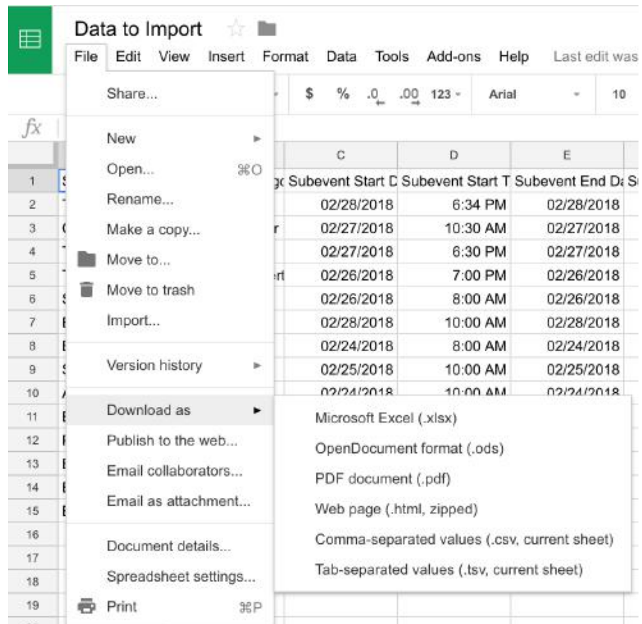
Schedule detail your day-to-day activity and may be imported to any event. Bulk import of Schedule with associated dates will be an important step in creating User Templates (see Eventuosity User Guide for more information on templates).



File Format - CSV

Start by opening or creating a spreadsheet (Excel or Google Docs). You'll want to be sure your output file (the final spreadsheet you use) is saved in a .CSV format. To save to a .CSV format in Excel use Save As on the File Menu. In Google Sheets, use Download As in the File Menu.





File Preparation: Events

Each row in your spreadsheet will represent an event (project) and each column will represent properties to be included in the WHAT, WHEN, and WHERE sections of that event. Required columns are:

- Name
- Type
- Project Start Date
- Project End Date
- Event Start Date
- Event End Date

Name	Type	Project Start Date	Project End Date	Event Start Date	Event End Date
Text	Text	mm/dd/yyyy dd/mm/yyyy	mm/dd/yyyy dd/mm/yyyy	mm/dd/yyyy dd/mm/yyyy	mm/dd/yyyy dd/mm/yyyy

Dates may be in MM/DD/YYYY or DD/MM/YYYY format. You will be asked to select the format you are using prior to completing the import.

No other fields are required but many additional field options are available, including Start/End Times, Custom Data Fields, and Location Data as shown below.

Event Start Time	Event End Time	Custom Data Field 1	Custom Data Field 2…n	Location Name	Location Address Columns
hh:mm AM/PM	hh:mm AM/PM	Text	Text	Text	Text (street, city, state…)

For best results, use the column headers in the sample spreadsheets available on our website. See the Eventuosity User Guide for further information.

Note: If your date values are converted to 2-digit years when saving to .CSV format in Excel, open the application's edit preferences and place a check next to the "**Preserve display of dates entered with 4-digit years**" option.

File Preparation: People

Each row in your spreadsheet will represent a person and each column will represent properties associated with that person's profile. Required columns are:

- First Name
- Last Name
- Email

For best results, use the above as the column headers and ensure that each person's record has data in all three fields. No other fields required for a successful People import but you may include additional information as necessary. See the Eventuosity User Guide for further information.

File Preparation: Tasks

Each row in your spreadsheet will represent a separate task and each column will represent properties associated with that task. Required columns are:

- Task Name
- Task Type
- Due Date
- Due Time

Task Name	Type	Due Date	Due Time
Text	Text	mm/dd/yyyy dd/mm/yyyy	hh:mm AM/PM

No other fields are required but we recommend you also include the following:

Start Date	Start Time	Remind Me Date	Remind Me	Remind Assigned	Remind Assigned	Notes

			Time	Date	Time	
mm/dd/yyyy	hh:mm AM/PM	mm/dd/yyyy	hh:mm AM/PM	mm/dd/yyyy	hh:mm AM/PM	Text

For best results, use mm/dd/yyyy or dd/mm/yyyy format for all dates. You may wish to paste your data into our pre-formatted, sample spreadsheets to ensure data and time values will import successfully.

Eventuosity will import the dates exactly as you have entered them in your file. **Please update all of your dates to fall within your Project window before importing**. Tasks that fall outside of the Project Dates will be imported with the current date at the time of your upload.

Note: If your date values are converted to 2-digit years when saving to .CSV format in Excel, open the application's edit preferences and place a check next to the "**Preserve display of dates entered with 4-digit years**" option.

File Preparation: Schedule

Each row in your spreadsheet will represent a separate sub-event and each column will represent properties associated with that sub-event. Required columns are:

- Sub-event Name
- Start Date
- Start Time
- End Date
- End Time

Sub-Event Name	Start Date	Start Time	End Date	End Time
Text	mm/dd/yyyy dd/mm/yyyy	hh:mm AM/PM	mm/dd/yyyy dd/mm/yyyy	hh:mm AM/PM

No other fields are required but we recommend you also include the following:

Sub-event Type	Sub-event Location	Street Address	City	State	Zip or Postal Code	Notes (as Custom Field)
Text	Text	Text	Text	Text	Text	Text

For best results, use mm/dd/yyyy or dd/mm/yyyy format for all dates. You may wish to paste your data into our pre-formatted, sample spreadsheets to ensure data and time values will import successfully.

Eventuosity will import the dates exactly as you have entered them in your file. **Please update all of your dates to fall within your Project window before importing**. Sub-events that fall outside of the Project Dates will be imported with the current date at the time of your upload.

Note: If your date values are converted to 2-digit years when saving to .CSV format in Excel, open the application's edit preferences and place a check next to the "**Preserve display of dates entered with 4-digit years**" option.

Appendix C – Working with Salesforce.com

Given the importance of events in supporting sales and marketing programs, it is often necessary to share project data between Eventuosity and a Customer Relationship Management (CRM) platform. With this in mind, Eventuosity offers Salesforce.com integration for all users.

Figure 107: Eventuosity is available on the Salesforce.com AppExchange

To send data from Eventuosity to Salesforce.com, look for the Salesforce icon in various places in the web application.   Clicking the icon will open a dialog for the appropriate actions at that place in Eventuosity.

Figure 108: Click the Salesforce icon in Eventuosity to being import or export actions

The following Salesforce.com-related actions are available in Eventuosity.

Action	Location in Web App	Details
Add People	Manage People >> Add New People	Imports selected contact data from Salesforce.com into the Eventuosity People database.
Export People	Manage People >> All People	Export selected People data from Eventuosity to Salesforce.com's contacts database.
Import/Export Tasks	Events >> *Event Name* >> Tasks	Syncs task lists between Eventuosity and Salesforce.com for the open event
Import/Export Schedule	Events >> *Event Name* >> Schedule	Syncs schedules between Eventuosity and Salesforce.com for the open event

Appendix D – Integration: Marketo

Many of the events that Eventuosity users manage are part of a marketing campaign. When tracking the overall campaign activity and results, it is necessary to look holistically at the programs that are supporting it. Therefore, Eventuosity is built to integrate with marketing automation platforms such as Marketo.

There are two general categories of Eventuosity/Marketo integration. The first is sharing of project data. The second is sharing of event-related sales leads. The functionality of each is discussed below after a review of the steps necessary to configure your Marketo integration in Eventuosity.

Configuring "My Account" for Marketo Integration

In My Account, scroll to the Integrations area and click the Edit button next to the Marketo section. You will be asked to populate three fields to set up your integration.

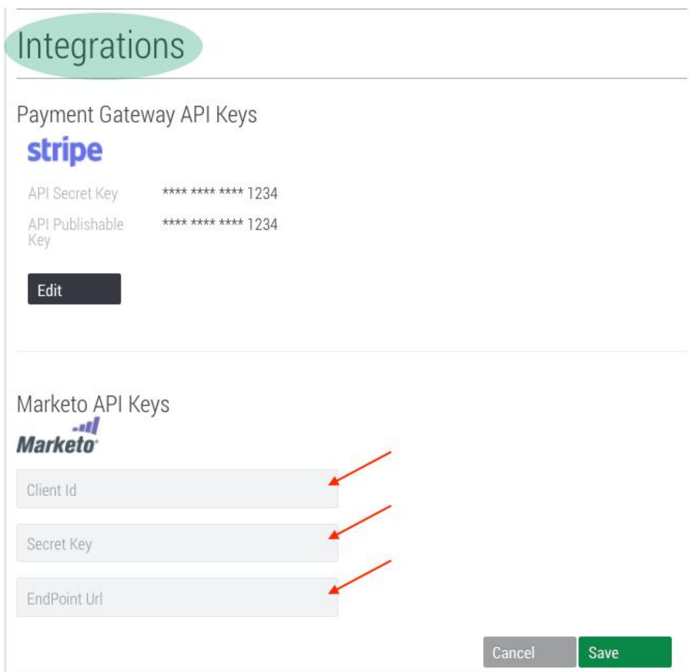


Figure 109: Populate fields in My Account with necessary Marketo credentials

The values for these fields are found in your Marketo account. To obtain them, log into Marketo and click Admin on the top menu bar.

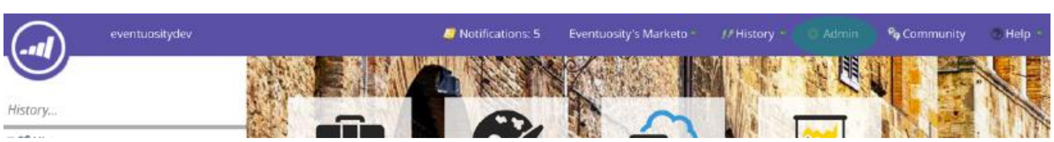


Figure 110: Marketo Admin gives access to integration settings

From Admin menu that appears on the left of your screen, select Launchpoint under the Integration heading.

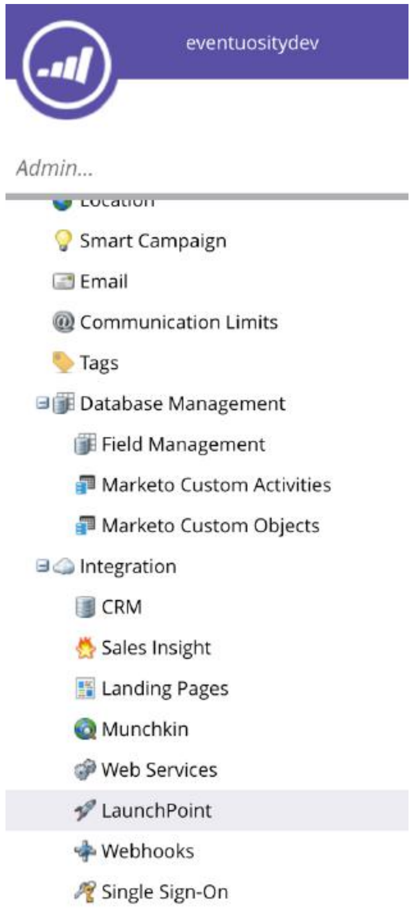
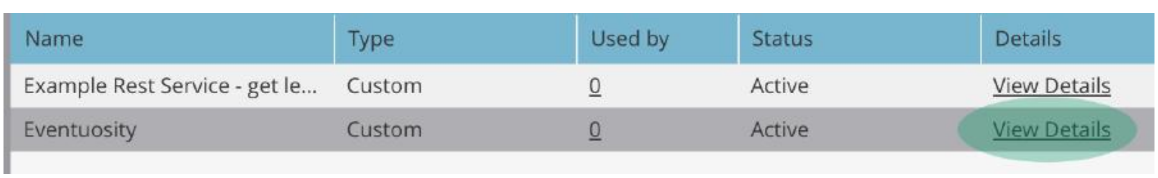


Figure 111: The Launchpoint menu is found in the Marketo Admin panel

You will then see a list of configured services in your Marketo account. Click the View Details link next to the service to get the necessary information to be entered into Eventuosity.



Name	Type	Used by	Status	Details
Example Rest Service - get le...	Custom	0	Active	View Details
Eventuosity	Custom	0	Active	View Details

Figure 112: A configured service is required to obtain credentials necessary for integration

Service Creation

Please note that it may be necessary for you to add a Custom service to your Marketo account for a user with appropriate role/permission level in Marketo. To add a custom service, follow these additional steps. If you have a service in place, skip to the section called Obtaining Client Details.

From the Launchpoint screen, click New >> New Service at the top left of your menu bar.

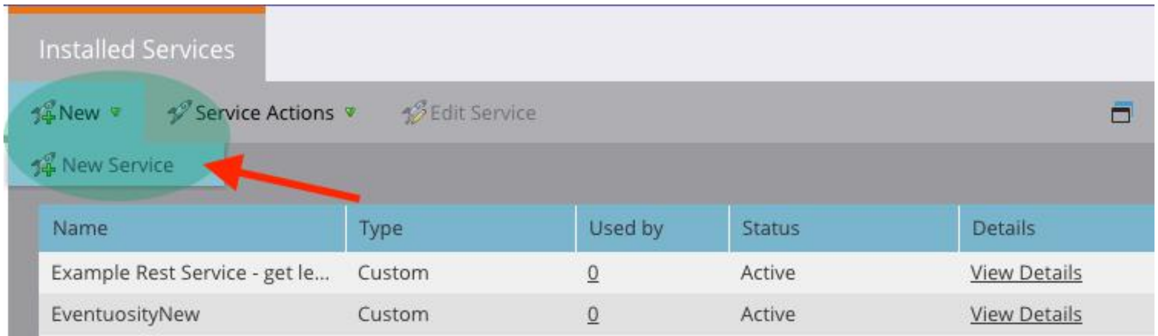


Figure 113: Add a custom service

In the New Service dialog box, add a display name (this may be whatever name you choose) and select *Custom* from the Service dropdown.

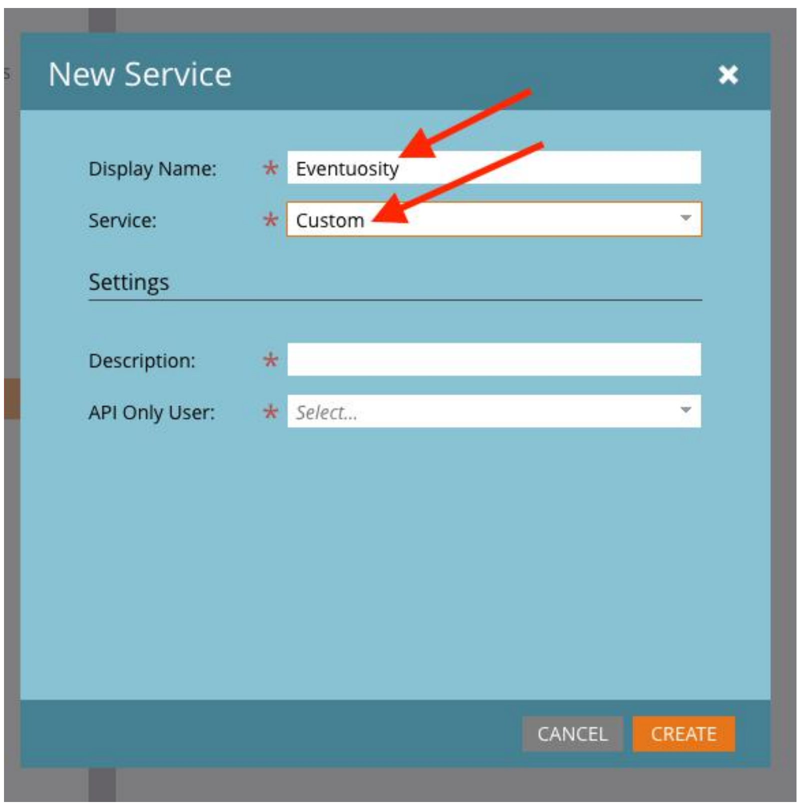


Figure 114: Service creation step 2 - Name the service

Create a description for your service (something easily identifiable) and choose the user with whom the service is associated. Then click Create.

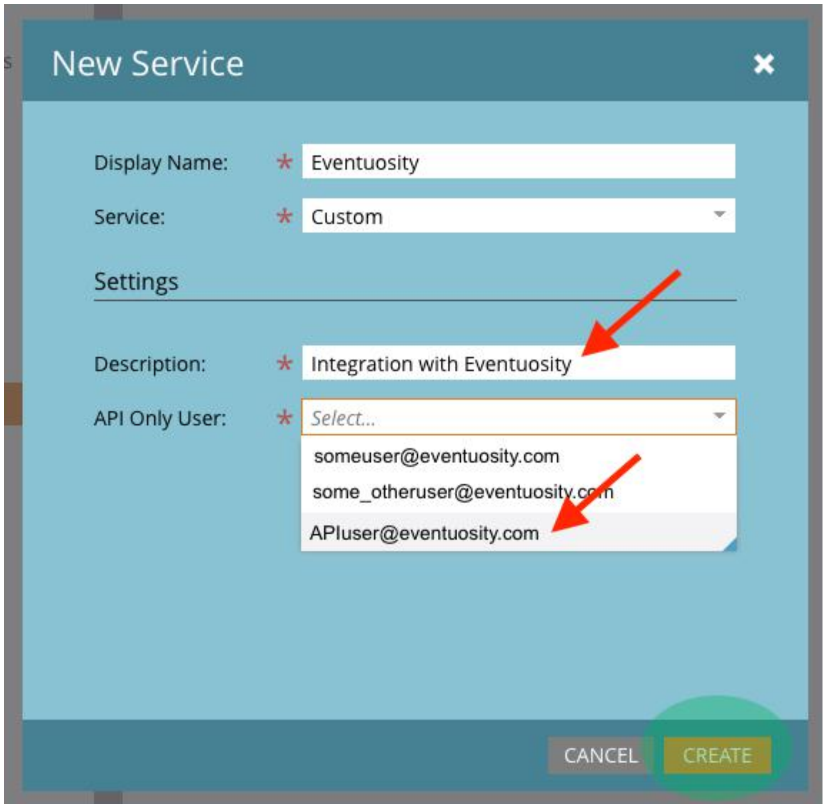


Figure 115: Service creation step 3 - Description and association with a user

The service will now appear in your list of Installed Services so that you may complete the rest of the integration set-up.

Obtaining Client Details

From the Details box that is displayed after clicking View Details, copy the Client id and the Client Secret values and paste them into the corresponding fields in Eventuosity.

Figure 116: Get key data from Client Details

Marketo REST API

Next, return to the Admin menu and select Web Services. Scroll to the REST API section, copy the Endpoint value and paste it into the corresponding field in Eventuosity.

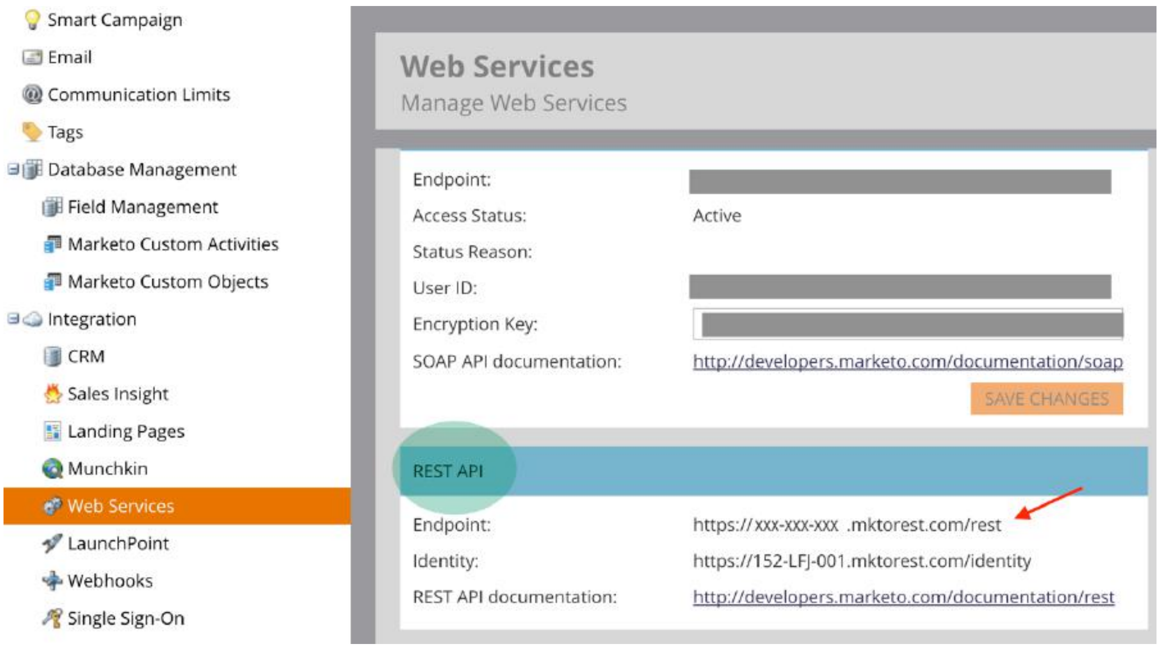


Figure 117: REST API data is found in Web Services

Once you have pasted the Marketo values in all three fields in Eventuosity, click Save. You will receive a confirmation message in your browser that your credentials have been updated.

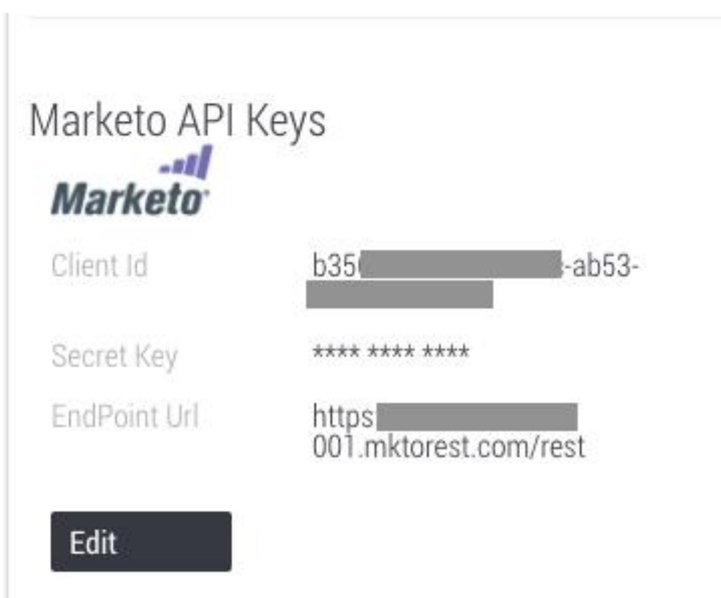


Figure 118: Paste Client ID, Secret Key, and Endpoint URL in My Account

Sharing Campaign and Event Data Between Marketo and Eventuosity

Event and campaign information can be shared in both directions between Eventuosity and Marketo. To initiate the push of data, look for the Marketo integration icons in the Eventuosity web app. The displayed icon will indicate whether information is being pushed from or pulled into Eventuosity

Figure 119: Click the Marketo-related icons to push or pull data

From Eventuosity to Marketo

To add an Eventuosity event as a marketing activity under a Marketo campaign, take the following steps.

Locate and click the Eventuosity to Marketo button below the WHEN section of your selected event.

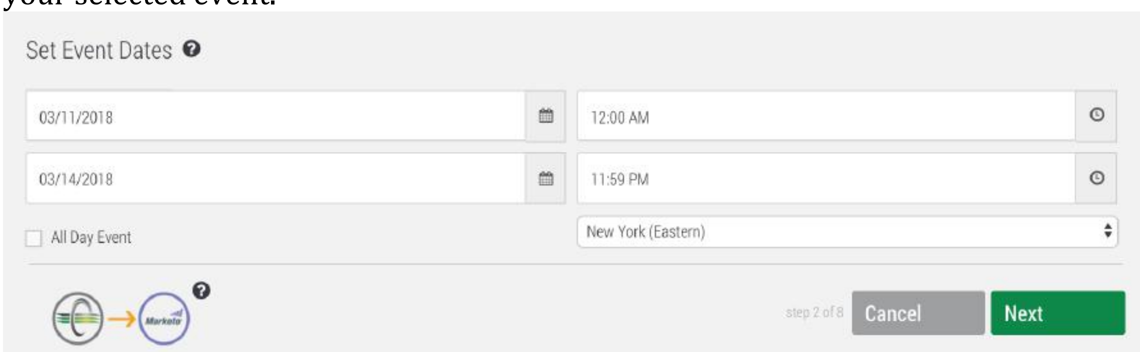


Figure 120: The Eventuosity to Marketo button below WHEN initiates the export process

Select the Marketing Activity folder to which you want to add your event and click Export Event.

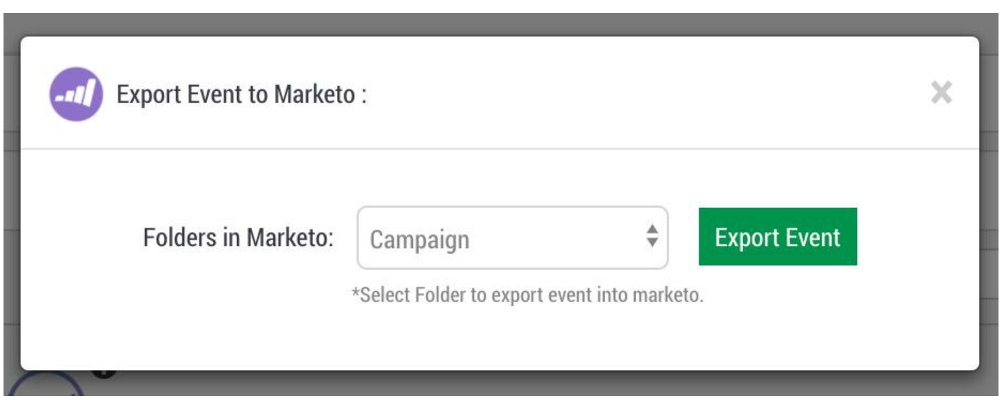


Figure 121: Export events to a Marketo folder

The event created in Marketo will include:

- Event Name
- Description
- Program Type – Set to Event
- Channel – From Event Type

Please note that there are some limitations in Marketo's handling of event dates when using the REST API. If your event is not listed with the correct dates in Marketo, look at the current date (date when you imported) to find it and adjust the calendar entries.

From Marketo to Eventuosity

From the Events screen of Eventuosity you can retrieve Marketo campaign data in order to create an Event. To create an Event for a Marketo campaign, click the Marketo to Eventuosity icon, select the account to which you want to import (if you are an Event Creator in multiple accounts), click Import Events.

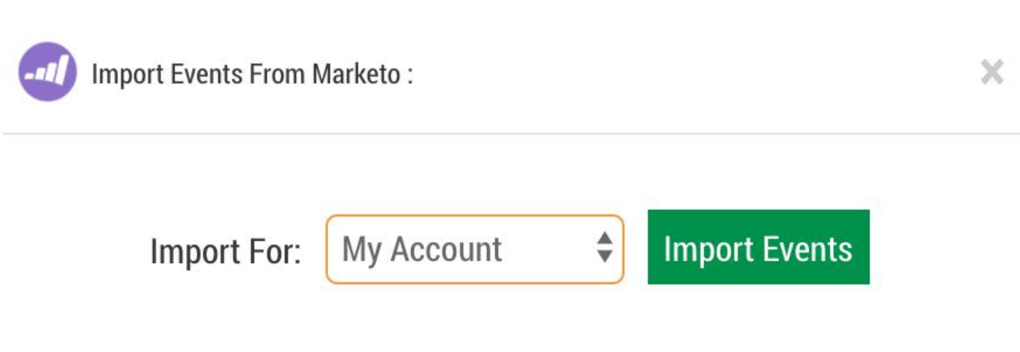


Figure 122: Dialog box guides you through an import of Marketo data

Eventuosity will search your Marketo Marketing Activities folders for events to import. Follow the prompts to complete the import of the marketing activities to Eventuosity.

Eventuosity can use the following data from Marketo when creating events.

- Name of Event
- Description
- Marketo ID
- Channel (to be used as Event Category)

Please note that Marketo does not require a great deal of data when an event is created as a marketing activity. If you are unsure of where your events are after import, go to the bottom of your Eventuosity events page. Events without a start and end date in Marketo will be located there.

Connecting Eventuosity Forms to Marketo Leads Database

If you are using Forms to register people in an event, the information collected at registration can be used to create or update a lead in your Marketo database.

To set up Eventuosity for syncing of captured form data with your Marketo leads database, you must create a form with appropriate options selected. Start by going to the Forms module in Eventuosity from the Home Screen or Task Bar.

Select the event with which your form data will be associated and click the Create Form button or the edit button for an existing form.

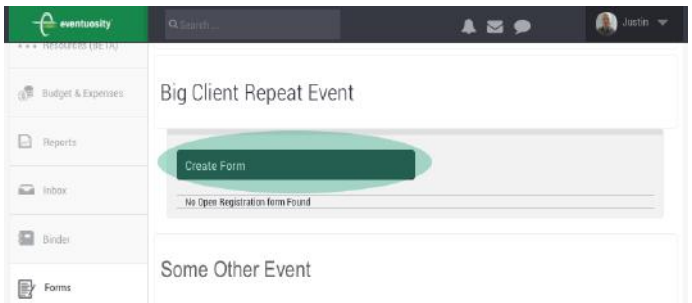


Figure 123: Use Forms to capture lead data that may be passed to Marketo

Build your form as you normally would. See the Forms section above for detailed instructions on form creation. Below the main section of the form builder, you will see a number of options indicating how that form will function. To ensure that form data is entered into your Marketo leads database, check the Sync with Marketo box.

Figure 124: Check the Sync with Marketo option to link received form data with your leads database

Please note that this box is greyed out and help text appears if your Marketo credentials have not yet been entered in your Eventuosity account. If you see this, save your form and exit to the My Account section of the Eventuosity application (found at the top right of your browser window).

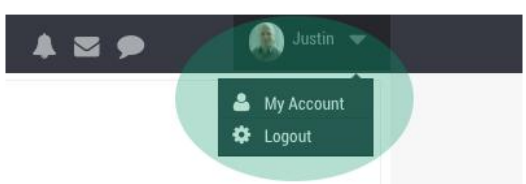


Figure 125: Marketo credentials must be entered before forms can be set to share leads data

You may then return to your form and check the Sync with Marketo box. If your credentials have been entered in My Account, the checkbox will be available and the help text will not be shown.

Figure 126: Check Sync with Marketo and click Save to update your form to use Marketo API keys and account credentials

All submissions through your form will be sent to your Marketo leads database from this point forward.