

User Guide



www.eventuosity.com Eventuosity, LLC | 107 Forrest Avenue, Suite 102 Narberth, PA | 19072 | USA +1 (877) 698-8664 support@eventuosity.com

Table of Contents

About eventuosity®	4
Login and Access	5
General Navigation, Home Screen and Task Bar Notification Control	
Master Event Calendar and Snapshot View	
Create and Manage Events	
Working With Templates	
Bulk Import of Events	
Event Basics: What, When and Where	
What	
When	
Project Dates	
Event Dates	
Where	
Event Management Modules	
People	
Sync People From Online Contacts Databases	
Import People From A File	
Add People Manually	
Custom People Data	
Roles Indicators	
Groups	
Adding People To An Event	
Roles	
Custom Roles: Enterprise Master Users Assigning Account-Wide Event Creators	
Event Creators in Enterprise Accounts	
Tasks	
Budget and Expenses	
Schedule	
Sync Schedules With Calendar or CRM Applications	
Resources	42
Event Binder	
Reporting and Analytics	49
Reports Module	
Event and Summary Reports	
Snapshot View	
Dashboard	
Inbox	E A
Mail	
Maii Chat	
Forms	



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	
Appendix A – Roles and Permissions	
Appendix B – Importing Spreadsheets to Eventuosity	
What Can You Import?	76
File Format - CSV	77
File Preparation: Events	77
File Preparation: People	
File Preparation: Tasks	
File Preparation: Schedule	79
Appendix C – Working with Salesforce.com	
Appendix D – Integration: Marketo	
Configuring "My Account" for Marketo Integration	82
Service Creation	
Obtaining Client Details	
Marketo REST API	
Sharing Campaign and Event Data Between Marketo and Eventuosity	
From Eventuosity to Marketo	
From Marketo to Eventuosity	
Connecting Eventuosity Forms to Marketo Leads Database	



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.



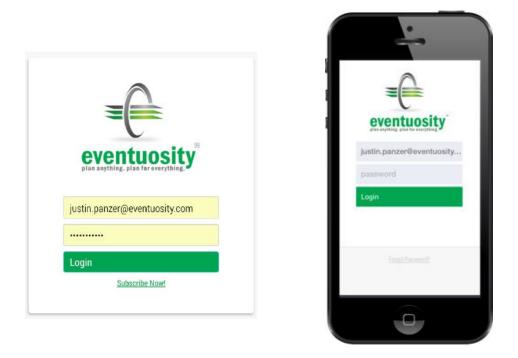


Figure 3: Users are required to log in using their email address and a password

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.

- eventuosity	R Seatth	4 2 9	🌒 Justin 🗢
Home	0	.n_n_	
Q Events	\mathbf{Q}		(
(iii) Lakendar	Create or Manage Events	Events Calendar	Dathloard
Caribboard			
To schedule	99		
21 People			
🔁 Taska	Manage People	View & Manage Tasks	Wew Event Schedules
+ P+ Resources (BETA)		~	
() Budget & Expenses	S	6 6 6	~
Pepata	Budget & Expenses	View & Manage Resources	View Reports
🖬 intex			
🖬 linder	.		
Forms			
taokings.	Binder	lebex	Farrs

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.

- eventuosity		🗜 🜌	i 🗩 🕼 Justin 👻
Home	O Create N	lew Event	
Events			
Calendar	Sort By: Event Start Date		Showing 40 out of 40 Event(s) Show 50 \$
Dashboard	Big Industry Show for 2019	Annual Meeting Demo	New Name of the Show We're Attending
Schedule	Event Creator: justin paraerigieventusity com Project Dates: 68/14/2018 to 06/18/2019 Event Dates: 05/15/2019 to 65/17/2019	Event Creator; justin, parzer@eventussity.com Project Date:: 07/02/2018 to 01/15/2019 Event Date:: 12/01/2018 to 12/06/2018	Event Creator: Justin parzer: [jeventhucolty.com Project: Dates: 02/14/2018 to 12/14/2018 Event Dates: 11/15/2018 to 11/17/2018
People	• • R 🖬 🖻		• • R 1 B
Tasks	Institute of Food Technologists (IFT)	Test Event - Community Outreach Program	American Industrial Hygiene Conference & Expo
O Resources	Event Creator: justin parcengiveentussity.com Project Dates: 80/04/2018 to 08/30/2018 Event Dates: 07/16/2018 to 07/18/2018	Event Greator; justin parcer@eventuosity.com Project Dates: 05/17/2018 to 00/31/2018 Event Dates: 07/15/2018 to 07/15/2018	Event Orestor: Justingenzer@eventussity.com Project Dates: 02/06/2018 to 07/07/2018 Event Dates: 06/21/2018 to 06/22/2018
🗿 Budget & Expenses	• • R 1 B	• • • 1 B	• • R B
Reports	SXSW 2018	RESEARCH AWARDS CELEBRATION	EXHIBITOR LIVE 2018
Inbox	Event Creator: Justin panzer@eventuonitp.com Project Datas: 06;10(2017 to 04/14/2018	Event Creator: rsup@uwa.ca	Event Cleator: Justin penzergiever/turoity.com Project Dates: 06/38:2017 to 04/01/2018

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)
0	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.



Send Notification Notification Type	(1) (Send?)	~		
Event Assigned		2 Send on Assignment	Send After	Send Manually
Event Update		O Send on Assignment	3 Send After	O Send Manually
Location Added		 Send on Assignment 	Send After	4 Send Manually

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.

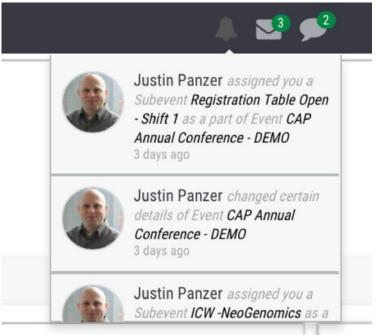


Figure 8: Notification Center in the Eventuosity web app indicates number of received notifications, mail messages, and chats. Clicking any notification in the dropdown opens the associated item.



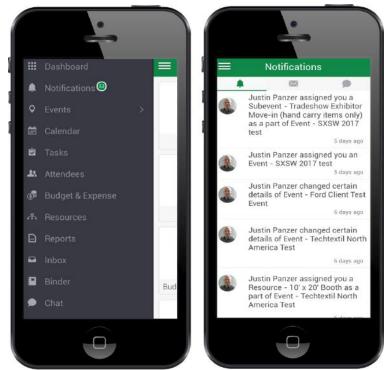


Figure 9: Assignment, Mail and Chat notifications are indicated in the Eventuosity mobile app Notification Center

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 colorcoded 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.

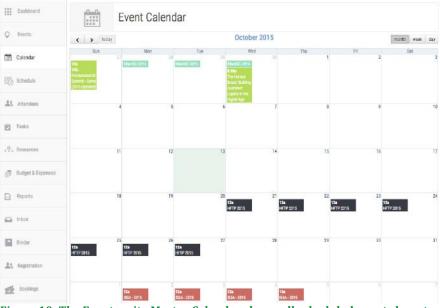


Figure 10: The Eventuosity Master Calendar shows all scheduled events by category



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.

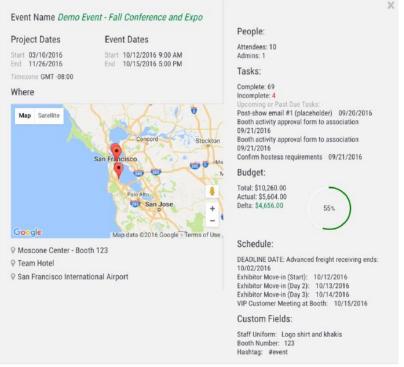


Figure 11: Snapshot View provides a quick status update for an event

Create and Manage Events

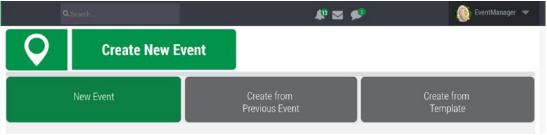
The Create and Manage Events module of Eventuosity gives the user access to all existing projects and allows creation of a new event project.

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.

	Add Event Details	
New Event Name : Select Event Start Date : Use the same date dependencies from the t	New Event From Template - Demo 07/04/2016 • Yes No	Create from Template
ite Templates		
Site Templates Eventuosity Generic Event Template		Choose
ventuosity Generic Event Template	late	Choose

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.

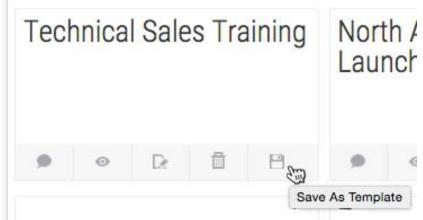


Figure 14: Save any event as a template for later use

User Templates		
Our Big Industry Trade Show - Annual	Choose	Ō
Quarterly Committee Meeting	Choose	Ō
Figure 15: User-created templates are available in the Eventuo	sity 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.

Justin's Generic Trade Sh	Choose
Quarterly Committee Meeting	Choose
Rename This	Choose
SW Southeastern Division National Sales Meeting - 2016	Choose

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 \rightarrow 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.

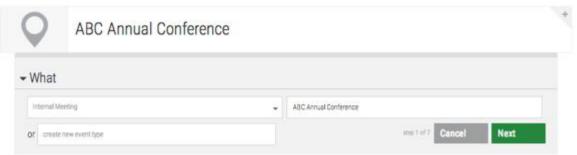


Figure 18: All events require a category and name in What

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.

When			
Set Project Dates 🕜			
Enter the date when you'll begin your planning activity		Enter the date when you expect to close this project	
07/02/2018	m	12/01/2018	m
Set Event Dates 🛛			
Set Event Dates •		12:00 AM	O
	m m	12:00 AM 11:59 PM	0

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.



Search My Locations			Map Satellite	TOWN CENTRAL AUSTIN	MUELLER	2 M () M (
or Austin Convention Center			3 Rollingwood Zilke Metropo	DOWN	ST AUSTIN	
East Cesar Chavez Street			350 BARTON HILLS		F - Dr - G	183
Address Line 2			34 SOUTH LAMAR	SOUTH S		
Austin	TX		nset Valley WESTGATE	House EAST RIVER	REIDE	1
78701			GARRISON PARK	- Ann	() Ion o	10
Save	Reset		W Hallow Cannon Co	SOUTHEAST AUSTIN Dessery Ln Torag		0 1
Save and Add Another Location	n		Google	Map data @2017	nney Google Terms	Austin-Bergstrom International of Use Report a map en
tin Convention Center ust Cesar Chavez Street, Austin	A A	stin-Bergstru rport sidential Boulevard, #	om International	₽ Hilton Aust East 4th Street, Au		
				step 3 of 8 C	ancel	Next

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.

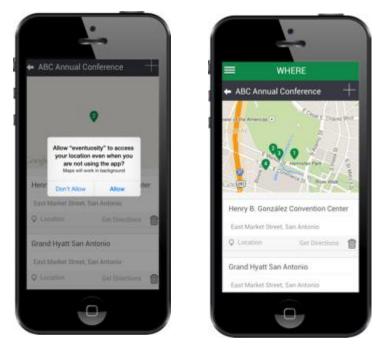


Figure 21: Event location data and turn-by-turn directions are available in iOS and Android mobile apps



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.

	Add New People	1
8.8	Add New Group	4
	All People	
	Export Propile Tor 😔 🐵 👄	
Manage People	🔄 Selest Al Vervalle 📄 Selest Al / Filterst	Delete Multiple
	B S AWAID, Sales	a Agency Market

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.

Upload	Cancel
Address1	
	Address1

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.

0		All					
1		Desition, Catting (developing lases (ant))		CORLEX pleasement on p	141	Larry	8
Ľ	100	Steve	12	Party Dejok (anaphipment and	100	Ignation arez (Included Loom)	
		Matt Degler Scools (statistics),me)	X	Carrie Naciliantian Islamiliatorite and elsi		Meliosa llinguette	
		Patrick Carler	2	Clifford Cavilla	4	Maria (adu)	
	1	(particular de la construcción d	12	Danger in the second edu)	100	Kennyetta Tillen hälle-gillelen com)	
	1	Pete Schuette	1	Maria Illicon		Sha	
L		cbelogines com		(maintender) Amaintender	1	Daniel Williams	
		Cult 110 Againe com		Bridget Schueller		Sale	
L			×.	(b Effective com)		jsingson]i om	
L	9	Ever edu)		sel title concepts/pyrall con-		Daniel Winston (American) (Speak con)	
Ŀ		mtacker []		Joing Halladined	10	Mark Kolonlein	

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).

Add New People		+
Add Multiple People From File (.csv or .vcf format)		
Choose File No file chosen	Upload	Cancel
Figure 25: Click Unload to import I	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.

eventuosity fields	CSV columns		
First Name * :	First Name	*	
Last Name * :	Last Name	*	
Email * :	Email	\$	
Company:	Company	\$	Ð
Company Id:	Make a Selection	\$	Ô
User Type:	Make a Selection	\$	ū
Title:	Title	۵	Ô
Phone:	Make a Selection	\$	ũ
Additional Email:	Make a Selection	\$	ũ
Other Phone #:	Make a Selection	\$	n

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.

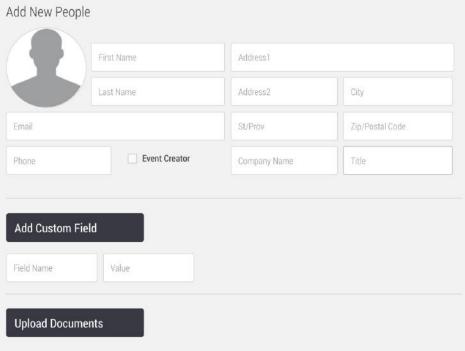


Figure 27: Create People manually when necessary



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.

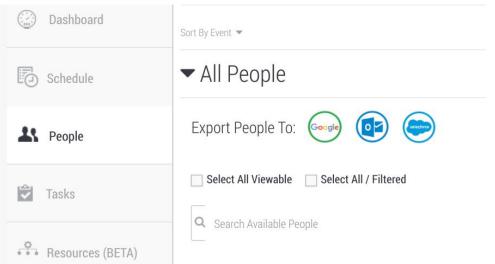


Figure 28: Send Eventuosity People data to an email or CRM application

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.

Add Data Field		
ihirt size		
lotel preference	Đ	
pouse or Emergency Contact	Ð	
ome other information	Ō	



Justin			100 Main One of			
Panzer			123 Main Street			
support@eventuosity.com			Address2		City	
431234567	Attendee	¢	PA		19111	
1431234307			Company Name		Title	
Add Custom Field						
	l					
filton Honors]	7480981234				
filton Honors]	7480981234 L		0		
filton Honors Shirt size]		Hilton)	Ō		
Add Custom Field Hilton Honors Shirt size Hotel preference Spouse or Emergency Contact		L	Hilton)			

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.

Upload Documents			
JPanzer DL - 2017.pdf	•	CEO press photo-500x525.jpg	•
Company CEO Bio.docx	0	2015 Conference Presentation-Show Version.ppt	0

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 adhoc 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.

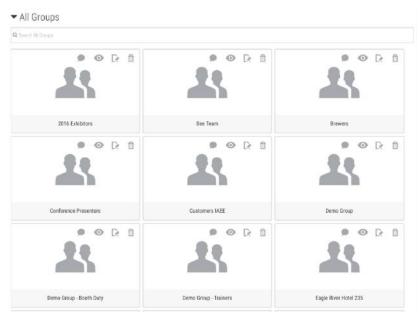


Figure 33: Creating groups can simplify communication and management



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

Name DemoC Eventuosity DemoC Eventuosity DemoA Eventuosity Demoe Eventuosity DemoB Eventuosity DEMO10003 Eventuosity DEMO10001 Eventuosity	Email testuser3@eventuosity.com testuser4@eventuosity.com testuser1@eventuosity.com testuser5@eventuosity.com testuser2@eventuosity.com DEM010003Eventuosity@noemail.com	Company Name A/V Company I&D Company	
Demod Eventuosity Demod Eventuosity Demoe Eventuosity Demo8 Eventuosity DEMO10003 Eventuosity	testuser4@eventuosity.com testuser1@eventuosity.com testuser5@eventuosity.com testuser2@eventuosity.com	1975-1979	
DemoA Eventuosity Demoe Eventuosity DemoB Eventuosity DEM010003 Eventuosity	testuser1@eventuosity.com testuser5@eventuosity.com testuser2@eventuosity.com	1975-1979	
Demoe Eventuosity DemoB Eventuosity DEM010003 Eventuosity	testuser2@eventuosity.com	1975-1979	-
Demo8 Eventuosity DEMO10003 Eventuosity	testuser2@eventuosity.com	1975-1979	_
DEMO10003 Eventuosity		1975-1979	_
	DEM010003Eventuosity@noemail.com	I&D Company	
DEMO10001 Eventuesity			
Demotoout Eventuosity	DEM010001Eventuosity@noemail.com		
DEMO10002 Eventuosity	DEM010002Eventuosity@noemail.com	Eventuosity, LLC	
DEMO10004 Eventuosity	DEMO10004Eventuosity@noemail.com	Marketing Agency	
TestDemo Test	testdemotest@noemail.com		9
-			2
	DEM010004 Eventuosity TestDemo Test	DEM010004 Eventuosity DEM010004Eventuosity@noemail.com TestDemo Test testdemotest@noemail.com	DEM010004 Eventuosity DEM010004 Eventuosity@noemail.com Marketing Agency

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.

ate New Group Name			
tes			
demo			
🗌 🔕 BOOTH_VENDOR, DEMO	🔲 🚳 BULEAD, PB-DEMO	🔲 🚳 DEMANDGEN, PB-DEMO	📃 😳 Demo, Justin
📃 Demo, Nina	Demo, SomebodylMissed	🛄 😳 Demonstration, Eventmanager	📃 DemoPerson, John
🗌 😳 EVENTLEAD, PB-DEMO	Eventuosity, DEM010001	Eventuosity, DEM010002	Eventuosity, Demo10003
Eventuosity, DEM010004	Eventuosity, DemoB	Eventuosity, Democ	Eventuosity, Demod
Eventuosity, Demoe	Eventuosity, DemoEventAsst	🔲 KidDemo, NewTest	🔲 🚳 SOCIALMEDIA, PB-DEMI
Test, TestDemo	TESTING, POSTFIXDEMO		
	Showing 1 to 2	22 of 22 entries	
	e c	1 > *	
		_	
		Car	icel Save Group

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.

Notification Settings			
went Creator			
went Creator			
Select All Viewable 📄 Select All / Fi	iltered		Assign Sele
demo			
demo			
		DEMANBGEN, PB-DEMO	🗌 😳 Demo, Justin
BOOTH_VENDOR, DEMO	🔲 🐼 BULEAD, PB-DEMO		
BOOTH_VENDOR, DEMO Demo, Nina	 Demo, Samebady/Missed 	🗌 🙆 Demonstration, Eventmanager	DemoPerson, John
🗌 Demo, Nina	Demo, Somebody/Missed	🗌 🧿 Demonstration, Eventmanager	
Demo, Nina	Demo, SomebodytMissed Eventuoeity, DEM010002 TESTING, POSTFIXDEM0	🗌 🧿 Demonstration, Eventmanager	

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.

Shared People My People EC- Event Creator AD- Admin AT- Attend			EX-Exhibitor 100-Coordinat	or				
							Ilaconian Mul	مامنا
Select All							Unassign Mul	tipie
🖂 🚢 🚳 DemoEv	R 🗇		Demo10	De	Û			
📃 🚣 🔕 DemoB E	De 🗇		Democ E	De	Ô	🔲 🚣 🔕 Demod E	De	ũ
🗆 🚢 🚇 DEM010	D: 🗇		DEM010	De	Û	🗌 🚣 💷 Demoe E	De	Ô
🖂 🚨 VendorA	D? 🌐		Julie Fre	R	Ô	🖂 🎩 💿 Marcy Pa	De	Û
📺 🔔 🧔 A-V Pers	区前	-10	Eve N. Tu	R	n			

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.



01/24/2015	N.A	EVENTUOSITY Trade Show Template	Yes
06/01/2015	11:59 PM	US2020 PHL Gamecamp	🖌 Yes
12/31/2015	11:59 PM	XIO Vegas Show	🗌 Yes
06/30/2015	11:59 PM	JDRF RE Games Demo	U Yes
03/31/2015	11:59 PM	EXHIBITOR LIVE 2015	🗌 Yes
10/18/2014	11:59 PM	Quarterly Sales Meeting at HQ	Ves
01/01/2015	11:59 PM	IAEE Expo!Expo! 2014	🗌 Yes
10/11/2014	11:59 PM	W&L Entrepreneurship Summit - Demo	🗌 Yes
11/30/2014	11:59 PM	November 2014 Training Curriculum	💌 Yes
10/18/2014	11:59 PM	Annual Sales Training and Awards	💌 Yes
11/12/2014	11:59 PM	Middle PA MPI conference	💽 Yes
02/28/2015	11:59 PM	Eagle River 2015	🗌 Yes
07/26/2014	11:59 PM	Exhibitor 2014	🗌 Yes
06/30/2014	07:00 PM	North America Product Launch Tour 2014 Q2	🖌 Yes

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.

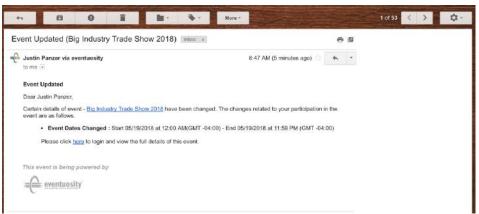


Figure 39: Example email notification sent to an attendee





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 <u>Appendix A</u> 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 <u>unless upgraded to an Enterprise level.</u>
- 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.

Contraction of the	DemoEvent/	Asst	123 Convention Center Blvd		
THE SECTION	Eventuosi	Attendee Support Team Staff Member	Address2		Las Vegas
estuser1@eventuosity.cor		Exhibitor Coordinator / Admin	NV		00000
877-698-8664		Event Creator	My Company		Assistant Event Coordinator
Add Custom Field			ny company		Assistant event coordinator
				Ū	

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.

Jul. - eventuosity A 🖾 📌 Dashboard Add New People Q Events Calendar Add New Group Co Schedule 1 People All People Tasks Company Annual Sales Conference Resource ▶SNAXPO Demo Event Budget & Exp ▶Tomorrow Tour Demo - Based on Philly 2016 ▶WEFTEC - The Water Quality Event ▶ Expo! Expo! Exhibitor Checklist 2016 inhex.

First, select All People:

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

S People	✓ All People			
Tasks	Q, demo			
%. Resources	rest2Kid DemoTest100	● [2 前	DemoC Eventuosity	● 🕞 🗊
Budget & Expenses	Demod Eventuosity	● De 前	DemoA Eventuosity	● ▷ 前
	Demoe Eventuosity	● D: □□	DemoB Eventuosity	● D: 前
Reports	DEM010003 Eventuosity	● D: 前	DEMO10001 Eventuosity	● ┣ 前
Inbox	DEM010002 Eventuosity	● □: 前	DEMO10004 Eventuosity	🖗 D: 11
Binder	EventManager EventuosityDemo	● D: 前	NewTest KidDemo	● R ff
Registration	TestKid NameDemo	● [2: 前	TestDemo Test	● D• ff
	POSTFIXDEMO TESTING	● 及前	EventManager EventuosityDemo	

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



dd New People			
	Eventmanager		
	Demonstration	107 Forrest Ave	
		Suite 226	Bethlehem
demoaccount@eventuo:		PA	181015
8776988664	Event Creator	Eventuosity, LLC	Event Planner

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.



Create Ne	w Event	
New Event	Create from Previous Event	Create from Template
- What		
Created For: O My Account	Client Select Client Name	T
	Eve N. Tuosity (supp	ort@eventuosity.com)
Select Event Type	O Handley Headney Inc (Daug Chards (deber	se in 1950 (me.com)
	New Event	Previous Event → What

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

	- What	
Calendar	Created For: Justin Panzer (justin.panzer@eventuosity.com)	
Schedule	Trade Show 🖌	viother Test for SSA
Tasks	OF create new event type	step 1 of 8 Cancel Next

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.



Incomplete	Complete		Sort By Due Date 😁
Due Date	Name	Туре	
03/11/2019	Submit entries for call for speakers	Content	◈◻▯▯▯
)3/14/2019	Reserve booth space	Show Services	◎ □ [] [] []
06/03/2019	Set show objectives and communicate to team	Planning & Strategy	◈◻▯▯▤⊵
06/03/2019	Set show budget and submit for approval	Accounting and Financial	
06/03/2019	Download and review show forms, exhibitor manual, show book	General & Logistics	◈◻▯▯▯
07/01/2019	Select booth/show team	Staffing	◈◻◙▯
07/01/2019	Set planning team meeting schedule	Planning & Strategy	◈◻◙▯
07/29/2019	Determine demo/product stations and content	Content	
07/29/2019	Determine technical requirements to support booth demos	General & Logistics	◈◻⊵▯ё

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.

 Tasks 				
Create New Tasks	Import Tasks	0	Export Tasks	
▶ Notification Settings				
Figure 43: S	Start new task creation v	vith 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.



Planning	& Strategy			•	Set show	objectives and co	mmunica	te to team	
or Creat	e Task Type								
Review	v past years' and ali	gn with o	ther department	s as app	ropriate				
Start On:	05/20/2019		12:00 PM	O	Remind Me:	11/14/2018	m	12:00 PM	O
Due By:	06/03/2019	m	5:00 PM	O	Remind Assigned:	11/14/2018	m	12:00 PM	0
Strategic n People			ract Negotiation C.						
 Attachr Strategic n People Shared F Shared F Shared F Assign 	nents Inarketing pl., I av 10 million 10 mil	e 😑 Ew	ent Creator 🛛 😑 A	ıdmin	Aember EX- Exhib	niter CO- Coordinato	r).		
Attachr Strategic m People Shared F C- Event Cro Assign Select Q Sear	nents nearketing pl. People My People ator 1AD-Admin 1AT- to me All / Filtered ch Available Pe	e 😐 Ew Attendee 13 cople	ent Creator 🥌 A SU-Support Team	idmin ST- Staff N					
 Attachr Strategio n People Shared 1 Shared 1 Assign Select Seart Q Seart 	nents exercise pl. People My People ator IAD-Admin IAT- to me All / Filtered PB-DEMO BULEA	e 😐 Ew Attendee 13 cople	ent Creator 🛛 😑 A	idmin ST- Staff N		oitor I CO-Coordinato			
Attachr People Shared i Assign Select Assign Assign	nents nearketing pl. People My People ator 1AD-Admin 1AT- to me All / Filtered ch Available Pe	e • Ew Attendee ! ! 2001e D _	ent Creator A A Support Team SU-Support Team O Nina Dem	idmin ST-Staff h O		SomebodyIMisse	-		

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.

Map your <i>e</i>	eventuosity fields to the incoming	g CSV columns
eventuosity fields	CSV columns	
Туре:	Category	•
Name * :	Activity	\$
Notes:	Notes and Updates	: 🗇
CSV Data Date Format * :	MM/DD/YYYY	\$
Start On:	Start Date	: 🗇
Start Time:	Make a Selection	• 🗇
Due By * :	Date Due	\$
Due Time:	Make a Selection	: 🗇
Remind Me date:	Make a Selection	• 🗇

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

Incomplete	Complete		Sort By Due Date 👻
Due Date	Name	Туре	
10/25/2017	Reserve following year's booth space	Registration	◈╙╔╻┇╚

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.

Assigned People	DemoA Eventuosity	Ō	✓≟ Demod Eventuosity	Ō
-----------------	-------------------	---	----------------------	---

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).

Incomplete	Complete			Sort By Due Date
Due Date	Name	Туре		
03/11/2019	Submit entries for call for speakers	Content	50%	00000
03/14/2019	Reserve booth space	Show Services	33%	00000
06/03/2019	Set show objectives and communicate to team	Planning & Strategy	679	□ [] [] [] [] []
06/03/2019	Set show budget and submit for approval	Accounting and Financial	0%	

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.

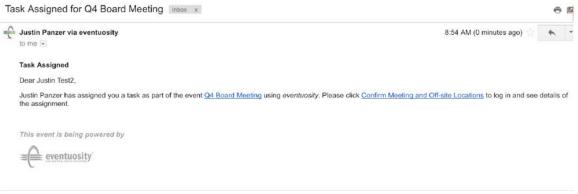


Figure 49: Email Task alert example





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.



- Budget & Expenses

Travel	\$150,000			Cancel Add Line
Category	Budget	Actual	Delta	
Audio/ Visual Information	\$200,000.00	\$225,000.00	(\$25,000.00)	
Beverages Saturday June 22	\$84.00	\$147.00	(\$63.00)	
 Early Bird Registration (500) 	\$250,000.00	S0.00	\$250,000.00	
General Service Contractor	\$150,000.00	\$125,000.00	\$25,000.00	
Medical/ EMT	\$21,600.00	\$21,600.00	\$0.00	
 Onsite Registration (108) 	\$86,400.00	\$0.00	\$86,400.00	
Regular Registration	\$130,000.00	S0.00	\$130,000.00	
Security Provider	\$5,000.00	\$5,200.00	(\$200.00)	
Snacks for June 20	\$581.94	\$551.44	\$30.50	
TOTAL	\$843,665.94	\$377,498.44	\$466,167.50	

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.

✓ Meals	\$500.00	\$256.85	\$243.15	
Add an Expense				
Value	Description		Croose File) No file chosen	
			Cance	Add Expense
Expenses				
Expense Value	Description	Attachi	ments	
\$79.58	Dinner On monday	Meals/0.jpeg 🛱		De ti
\$58.05	Lunch-Marriott Arrival	Meals/2.jpeg 🗇		De ti
\$6. <mark>5</mark> 0	Starbucks	Meals/3.jpeg		D: 1
\$15.41	Breakfast-Sunday	Meals/5.jpeg		De ti
\$8.55	Breakfast-Sunday(Marcy)	Meals/6.jpeg		Dr fi
\$24.30	Lunch-Monday(w/\$1tip)	no attachment		Dr ti
\$12.00	Lunch/snack-Starbucks(w/\$1tip)	no attachment		De ti
\$26.32	Breakfast/tip	Meals/7.jpeg	Meals/7.jpeg	
\$17.98	Food For Plane	Meals/8.jpeg 📋	Meals/8.jpeg	
\$8.16	Lunch-day 2	Meals/9.jpeg 🛱		D: 🗇

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



Event Binder	(
Miscellaneous (1)	
Receipts (13)	
► Receipts-Booth space reservation (1)	
← Receipts-Contract staff/I&D/Labor (2)	
Receipts-Contract staff/I&D/Labor contents	Add Files
Contract staff/I&D/Labor/0.jpeg	•
InstallationDismantle_0716-55419_F2.pdf	O 🗊
 Receipts-Equipment (0) 	
Receipts-Insurance (0)	

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.

Enter a Budget Category	budget		Ca	incel Add Lin
Category	Budget	Actual	Delta	
r Flights	-	-	-	
dd an Expense				
Value	Description		(Choose File) No file chose	n
			Cancel	Add Expense
xpenses				
xpense Value	Description		Attachments	
Hotel				

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.



Expense Details	Expense Details	BUDGET
Audio/ Visual Inform_	← Audio/ Visual Inform	+ IAEE Expo!Expo! 2014
Amount	Amount	+ Add Budget Category
	225000 Description	6996 Booth Rental & Svcs \$5,115,66 of \$7,500.0 \$2,344,34 Left
Description	Actual Cost	0.00
Ø Add Attachment	@ Add Attachment	22% Ground Transportation \$55.00 of \$250.00 \$195.00 Left
Save	Uptimit Image	D R B
	Camera	(112%) Marketing Expenses \$562.00 of \$500.00
	Gallery	\$62.00 Exceeded
	Cancel	() ***
0	$\overline{\mathbf{c}}$	6

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.



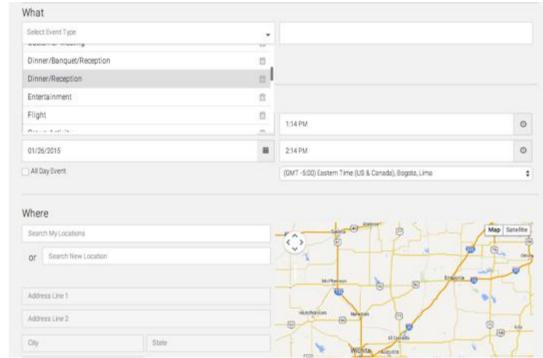


Figure 56: Create sub-events to build a calendar for one or all event participants

Search My Cocations		C S	Charles Deserry Charles Contra Contra Map Satellite
Or Baltimore Convention Cente	é	C a	
Address Line 1		erg of Farghand	united State of the State of th
Address Line 2		W Pratt St	
City	State		Conversion Corner
Zu			
Reset	Search	Carrow States Marc	WOOWN R.
		Collins Market	e Larre II op data 62215 Google Terms of Use Report a map enter
Attendees			
o, Search Available Attende	ves.		
📋 Demoß Eventuosity	DemoE Eventuosity	🖌 DemoC Eventuosity	DemoA Eventuosity
👿 DemoD Eventuosity	Marcy Panzer	🛃 John Smith	Test User
Confirmed Attendees			
			Cancel Save

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).

Notificatio	n Settings					
List View	🛗 Calendar View	🕕 Import Schedule 🛛 🗂 Export My Schedule				
Start Date	Start Time End Time	Subevent Name				
05/13/2017	12:00 PM 1:00 PM	Weekly planning committee kickoff meeting (placeholder) Noom Lacater: man confirmer room	۲	Ē	R	Ô
10/04/2017	8:00 AM 11:45 PM	Show Services Ordering: Discount Price Deadline	0		$\square r$	Ô
10/24/2017	11:00 AM 5:00 PM	Exhibitor Move in Load in allowance. May once on concurrent least with 2 wheel Berns, Load in map Attracted Patienty for drop cell VS manufes	٢	1	Dr	Ô
10/24/2017	3:00 PM 4:00 PM	Hotel Check in Contraction # 1971/111	0		Dr	Ô
10/24/2017	6.00 PM 8:00 PM	Exhibitor Appreciation Event lotes are able Matte Sound will be provided a free dirk at the bar, exact arrive between April April Exhibitors will be provided a with hand of their booth on the 16th or call when is no 6 convertige at immed of each.	0		R	Ö
10/25/2017	7:00 AM 10:00 AM	Exhibitor Move in (Final setup)	0	(iii)	$\mathbb{D}\!$	Ô
10/25/2017	8:00 AM 8:30 AM	Pre-show meeting for booth team (placeholder)	0		De	Ô
10/25/2017	10.00 AM 5:00 PM	Exhibit Hall Hours	0	Ē	De	
10/25/2017	10.45 AM 11.15 AM	Customer meeting and demo at booth	0		De	Û
10/25/2017	5:00 PM 9:00 PM	Exhibitor Move-out	0		De	۵
10/25/2017	6:30 PM 8:30 PM	HizBash NVC Post Party materior per John Marte: Cartest numbers 378-198-8430	0	î۳	De	۵

Figure 59: Example sub-event schedule in List View



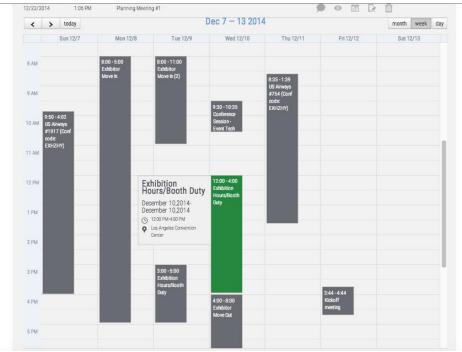


Figure 60: Example sub-event schedule in Calendar View

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.

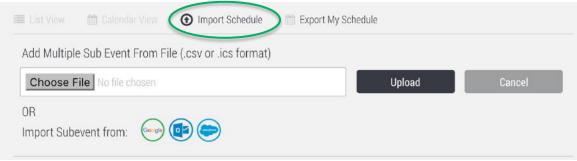


Figure 61: Use Import Schedule to add external calendar data to Eventuosity

Similarly, Export My Schedule allows users to sync their Eventuosity subevents 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.

	🛗 Calendar View	💿 Import Schedula 🛗 Export My Schedule	
Start Date	Start Time End Time	Subevent Name	
05/01/2017	12:00 PM 1:00 PM	Weekly planning committee kickoff meeting	
07/18/2017	9:00 AM 5:00 PM	Show Registration and Check-in	
07/18/2017	10:00 AM 4:00 PM	Advance team inbound flight	• 🗆 🗰 🕞 🛍
07/19/2017	8:30 AM 9:00 AM	Pre-show meeting for booth team	• 🗅 🗰 🕞 🛍



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.



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.



- Resources			
Breakout/Meeting Rooms	•	Rooms	\$
OF Create New Resource Category		Of Create New Unit	
Corporate Training Center Rooms		9	
Units Assigned:0		Units Open:0	
Each room can be configured in classroom (25), lecture (40) or U-shape (15).			
Choose File No file chosen		Or Paste URL	
Add More			
Assign Resource To: Attendee Sub-event		Both	
Q Search Available Attendees			
DemoB Eventuosity			

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.

Receipts-Audio/ Visual Information	Receipts-General Service Contractor	Receipts-Security Provider
Resource-Demonstration units for product tour		
Resource-Demonstration units for produc	t tour contents	View Delete
Cancel Add Files		

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

Equipment		\$	Units		\$
OF Create New Resource Category			Or Create New Unit		
Projectors			5		
Units Assigned:0			Units Open:0		
These are stored with the Admin by the from	t desk.				
Choose File No file chosen					
Choose File No hie chosen			Or Paste URL		
Add More					
Assign Resource To: Attendee	Sub-ever	nt	O Both		
Assigned Attendees					
Subevents					
09/23/2015	12:00 PM	Planning Tear	m Kickoff Meeting		
Assign all of this resource to the sub-event?	🔿 Yes 🔍 No		No. of Units	1	

Figure 66: Partial Resource assignment example



- Resources

Resources					
Create New Resource					
Categories					
▼Equipment					Ō
Resource Name	Assigned	Total	Open		
Nextel Radios	4	10	6	D: Ó	
Demonstration units for product tour	2	17	15	D: D	
- Security					Ō
Resource Name	Assigned	Total	Open		
Secured Room Keys	4	42	38	Dr 🗇	
- Hotel Rooms					Ô
Resource Name	Assigned	Total	Open		
Marriott Riverwalk	0	34	34		

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.



HousingInfo	
Add Files Crosse File Room Block Contract.pdf	
Choose Flig No file chosen	

Figure 69: Create virtual binder folders and add files

BizBash Live: The Expo New York 201 Event Start Date: 10/25/2017	7
Event Binder	6
• Contacts (0)	Û
 Invoices (0) 	Đ
► Registration (0)	Ô
 Travel (0) 	Đ
- Insurance (1)	ū
Insurance Items	Add Files
eventuosity LLC BizBash NYC_2017.pdf	• • •
Receipts (12)	
 Resources (1) 	
 Sub - Event (12) 	
▶ Task (35)	

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.

Task-Arrange travel (1)	
Task-Arrange travel Items	Add Files
http://www.exhibitoronline.com/live/2017/hoteltravel.asp	⊚ 🗎 …

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.

Event Ma	anageme	ent Files and Ass	ets	
 Notification Settin 	igs			
Send Notification				
Notification Type	Send?			
Folder Added/Removed		Send Immediately	O Send Manually	
File Added/Removed				
			Cancel	Save
Folders				6 D
- Contract Templates	s (2)			Û
Contract Templates Items				Add Files
Contract Negotiation Check	list - Venue.pdf			⊚ 🗊 …
Eventuosity LLC Standard N	IDA - Rev 2014031	I0.pdf		④ ⑪ …
 Marketing and Bran 	iding Assets	(0)		Û
 Special Events Idea 	is and Layou	ts (2)		Û

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).



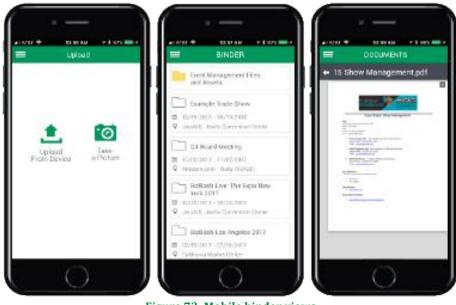


Figure 73: Mobile binder views

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.

	CC THE	 Reministration Space Reservation (1) 	4 ± 0		
	E Geder	Peoripte Roath Episor/Normation Intra		(Downlawi	
	-	Grokestell.5.1119.200710141131,edf		D can h	
	E fam.	 Recepts-Rooth Staff Registration (0) 		B CON LIN LAW	
	Santanga	 Receipts Booth ball(s)mad costs (0) 			
		 Receipts Carporting (f) 			
		 Recopts-Electrical (0) 			
		Recepts Instance (0)			
	_	 Reports Lead Capture Revtal (0) 			
		 Receipts Marketing (I) 			
	e a seis	• Recepts block and totlectainment (3)			
DODUMENTS		· Recepts Other show services or restal (security, clear in	g, humiture, Bowers) (D)		
ontesot Tempia		Receipts Promotional Items (0)			
tract Negotiation Ch	10. III	 Recepts Shapping and Materials Handling (6) 			
nuceity LLC . Vien		Recepts Signage Printing (3)			-
(Down		+ Receipts Supplies and Miscellaneous (3)			
C copy i	1				

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



	Reports
Select an option	

Figure 76: Reports module screen

Select a report category from the dropdown list.

\sim	Repor	rts
Select an option	•	
Search	Q	
 Select an option 		
Binder Content		
Budget		
Event-Summary		
Groups		

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.

~	Reports	
Task 👻	Event Category, Task Types, Task Assignment, Task Status 👻 🐱 Event	Category All Selected (18) 👻 🛪
Task Types All Selec	ted (105) 👻 🗙 Assigned to Others 👻 🛪 All Status 👻 🕱 Group by Task	Ŧ
Task Types All Selec	ted (105) 🔻 🛪 Assigned to Others 👻 All Status 👻 K Group by Task	
		*
Task Types All Selec Date Range : All 👻	Search Q	View Report Cancel

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.

ik T	ypes All Selecte	d (105) 💌 🗙	Assigned to O	thers 🔻 🛪 Inco	mplete 👻 🗙	Group by Task	*		
to	Range :								
	xt Month 👻	٦					Vi	ew Report Cance	4
		J							
x							2 Sear	oh Cr	lumns +
	• 2		_				2 Sear		
•	Task Report	1						4	20
				Event Category	Due Date		Remind Me Date	Dentied Antiperd Date	
	Task Name	Task Type	Event Name	Event Category	Due Date	Start Date	Remind Me Date	Remind Assigned Date	Task Cri
+	Complete shipping, warehouse storage and materials	Task Type Show Services	EXHIBITOR LIVE 2018	Trade Show	12/08/2017	Start Date	11/24/2017	Hemina Assigned Date	
	Complete shipping, warehouse storage and		EXHIBITOR LIVE						Justin Pa

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.



			ate : Nov	20, 2017 02:39 PM		
Eve	W 2018					
	nt Type : Trade Show			Event Creators :	Justin Panzer	
				(justin.panzer@e	ventuosity.com)	
Eve	nt Start Date : Mar 11, 2018 12:00 A	м		Project Start Date		-
	nt End Date : Mar 14, 2018 11:59 PM			Project End Date		
	om Fields Data	3				-
1	Booth Number	ITE	A within ?	30 days of show dat		-
2	Booth Property	100		counters	-	-
3	Show Website			sxsw.com/exhibition	ns/trade-show/	-
4	Show General Contractor	1.04.27		now ID 458991)		-
5	Exhibitor Kit Link (Freeman)	htt 91		freemanco.com/sto	re/show/landing.jsp?showID=4589	
6	Booth Staff Uniform					
7	Social Media Information			-		
8	Speaking and Sponsorship Detail	S				
9	Exhibitor Dashboard (SXSW) - Exhibitor ID 100109	htt	.ps://sxsw	18.exh.mapyoursho	w.com	
Loc	ation(s) Austin Convention Center : 500 E					
3 Peo Tota Ever Adm	Hilton Austin Downtown : East 4th Austin-Bergstrom International Ai ple I People In Event : 1 tt Creators Assigned : 1 ins Assigned : 0	h Street Au rport : Presi Exhibitors Staff Assi	stin TX 78 dential Bo s Assigned igned : 0	701 ulevard Austin TX 1:0	78719 Attendees Assigned : 0	
2 3 Tota Even Adm Coo	Hilton Austin Downtown : East 4th Austin-Bergstrom International Ai ple I People In Event : 1 nt Creators Assigned : 1	h Street Au: rport : Presi Exhibitors Staff Assi Support 1	stin TX 78 dential Bo s Assigned igned : 0 Feam Assi	701 ulevard Austin TX 1:0		
2 3 Tota Even Adm Coo	Hiton Austin Downtown : East 48 Austin-Bergstrom International Ai ple I People In Event : 1 tt Creators Assigned : 1 ins Assigned : 0 rdinator Assigned : 0 nt Creators and Admins Assig	h Street Au: rport : Presi Exhibitors Staff Assi Support 1	stin TX 78 dential Bo s Assigned igned : 0 Feam Assi	701 ulevard Austin TX 1:0		
2 3 Peo Tota Even Coo Even Nam	Hiton Austin Downtown : East 48 Austin-Bergstrom International Ai ple I People In Event : 1 tt Creators Assigned : 1 ins Assigned : 0 rdinator Assigned : 0 nt Creators and Admins Assig	h Street Au rport : Presi Exhibitors Staff Assi Support 1	stin TX 78 dential Bo s Assigned igned : 0 Feam Assi ent	701 ulevard Austin TX 1 : 0 gned : 0	Attendees Assigned : 0	

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.



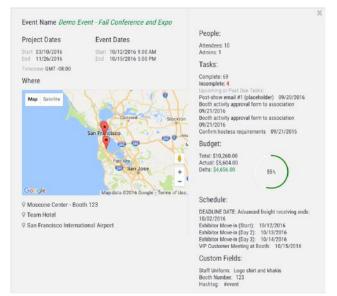


Figure 81: Event Snapshot View is available from Master Calendar and Events

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.

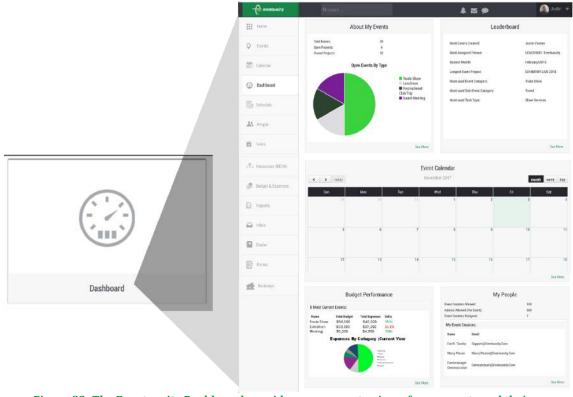


Figure 82: The Eventuosity Dashboard provides an aggregate view of your events and their performance



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.

Home	Inbox	
C Events	🖬 Mail 🔅 Chat	
allendar	Compose Mail	View Message Subject: The information you wanted about our crates for shipping
② Dashboard	 □ Inbox □ Sent Mail 	From: Eve N Toosity Tro Eve N Toosity Tro Eve N Toosity Tro EVENTUOSITY Trade Show Exhibitor Template (w/ SUGGESTED DATES) EVENTUOSITY Trade Show Exhibitor Template (w/ SUGGESTED DATES)
Schedule	Drafts LABELS	Weights, number of boxes, etc. I've updated in the task data but wanted you to know.
K People	SXSW 2018 EXHIBITOR LIVE 2018 BizBash Live: The Expo New York 2017	Reply + Forward Delete
Tasks	ST ANDREWS ENCHANGE PROGRAM	
esources (BETA)	BizBash Los Angeles 2017 Hartley Hockey Camp 2017	
🗊 Budget & Expenses	 BizBash Florida 2017 Exhibitor Live 2017 (Eventuosity Team Project) 	
Reports	SXSW Interactive 2017 (Eventuosity Team Project)	
Inbox	USA Hockey Pond Championships Eagle River 2017 Board Meeting	

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.



- eventuosity	Q Search		A 🗉 🗩	🚯 Justin 👻
	FOLDERS			
Dashboard	🕰 Inbox	✓ To To People		1
	🖂 Sent Mail	To Group To Event		
Co Schedule	Drafts	To Task		-
EG) Somethic	LABELS	To Subevent		
A People	SXSW 2018 EXHIBITOR LIVE 2018			
	BizBash Live: The Espo New York 2017			
Tasks	ST. ANDREWS EXCHANGE PROGRAM			
	BizBoah Los Angeles 2017			
*** Resources (BETA)	Hartley Hockey Camp 2017			
	BizBash Florida 2017			
🛞 Budget & Expenses	 Exhibitor Live 2017 (Eventuosity Team Project) 	Choose Label		٩
Reports	SXSW Interactive 2017 (Eventuosity Team Project)	Attachments		
	USA Hockey Pond Championships Eagle River 2017	Choose File No file chosen	2	
Inbox	Sound Meeting	Add More Documents		
	Sepor Export Exhibitor Checklist 2016			
Binder	◆ MEE Expo! Expo! 2016 (Booth #1042)	L		
	BaBash Live: The Expa New York 2016			
Forms	Event Tech Live (New)		rt Send	🛪 Cancel 🥒 Draft
122	faranan an ar sa			

Figure 84: Message recipients can be easily specified

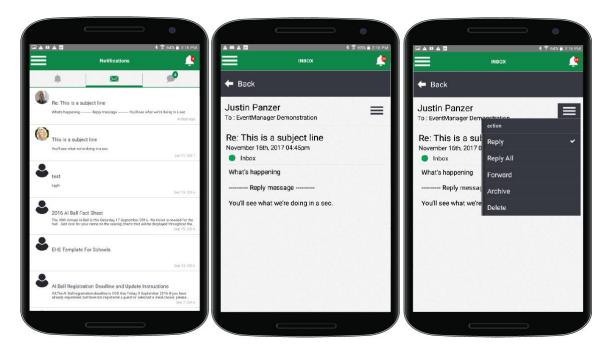


Figure 85: Eventuosity mobile messaging



Mail

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

Compose	Mail	Compose Mail * Discare	9				
OLDERS							
a Inbox		To Event	\$				
Sent Ma	ail	EXHIBITOR LIVE 2018	•				
Drafts		Team update for our event					
ABELS		2. B / U 2 Tokun Contenser. A = = = = 11					
SXSW 2018	SEXHIBITOR LIVE 2018	income and the second measurements in the second second second and second measurements measurements					
		All, This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you wo					
BizBash Live	e: The Expo New York 2017	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to	ŧ.				
ST. ANDREW	e: The Expo New York 2017 VS EXCHANGE PROGRAM		ì				
ST. ANDREW	VS EXCHANGE PROGRAM	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to)				
ST. ANDREW LUNCHEON BizBash Los	VS EXCHANGE PROGRAM	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to)				
ST. ANDREW LUNCHEON BizBash Los	VS EXCHANGE PROGRAM Angeles 2017 Rey Camp 2017	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to)				
ST. ANDREW LUNCHEON DizBash Los Hartley Hool BizBash Flor Eschibitor Liv	VS EXCHANGE PROGRAM Angeles 2017 Rey Camp 2017	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to have it offline on your mobile. Next meeting is tomorrow at noon.					
ST. ANDREW UNCHEON BizBash Los Hartley Hool BizBash Flor Exhibitor Liz Project) SXSW Intera	NS EXCHANGE PROGRAM Angeles 2017 Arey Camp 2017 Kida 2017	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to have it offline on your mobile. Next meeting is tomorrow at noon.	Q				
ST. ANDREW ST. ANDREW BizBash Los Hartley Hool BizBash Flor Exhibitor Lire Project) SXSW Intern Project) USA Hookey	NS EXCHANGE PROGRAM	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to have it offline on your mobile. Next meeting is tomorrow at noon. [*Choose Label] XEXHIBITOR LIVE 2018] Attachments					
ST. ANDREW UNICHEON BizBash Los Hartley Hold BizBash Flor Exhibitor Liv Project) SICSW Intera Project)	NS EXCHANGE PROGRAM	This is for the whole staff. You have access to Eventuosity but I have attached a report just in case you would like to have it offline on your mobile. Next meeting is tomorrow at noon.					

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.

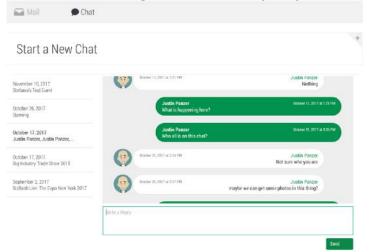


Figure 87: Chat messages for quick communication between event participants



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.

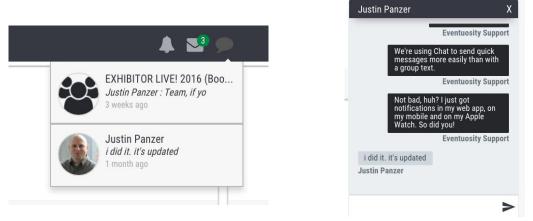


Figure 88: Click the chat bubble icon in the Message Center to open an Eventuosity Chat window in your browser

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.

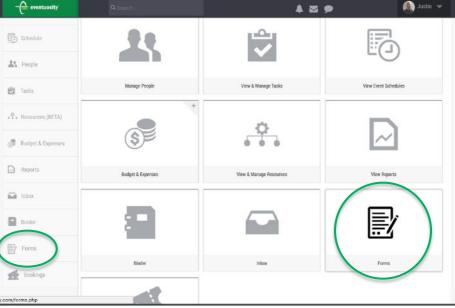


Figure 89: Select Forms to open a list of active events for which forms may be created



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

-eventuosity	C Search	A* 🔊 🗭	🛞 EventManager 👻
	July Wellness Fair		
💰 Budget & Expenses			
Reports	Create Form No Open Registration form Found		
inbox			
Binder	Eventuosity Demo		
Forms	Annual conf take 2		

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.

Create Form		
Test Form		• 🕞 🗍
Open Registration Form		
💌 Email Address	💌 First name	 Last name
Address	City	St/Prov
Postal code	Company/Org name	✓ Title
Phone number		

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.



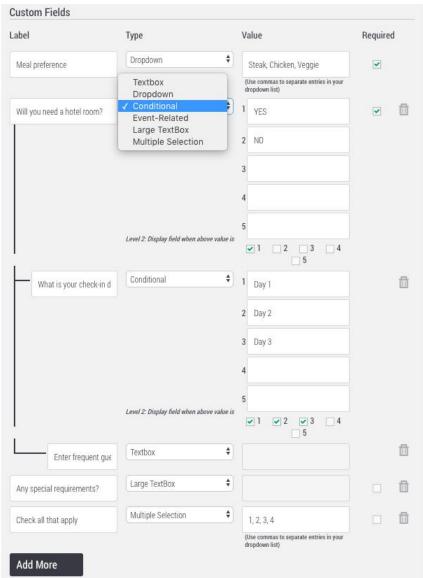


Figure 92: Add custom fields to your form

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.





More Forms Options

Several additional options are available when creating a registration form.

1	•	Require user to set a password?
	•	Receive notifications for this form? 2
3		Sync with Marketo?
		Enable Ticketing? 4
5		Customize acknowledgement email?
		Send consolidated event info in email?
7		Accept donations through this form?
	2	Save Cancel
	No	. of form views : 0
		ople registered through form : 0



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.

Enable Ticketing?	 For unpaid ticket types, do not show payment field on my 	om	Show tickets available and max quantity		
Manage Ticket Types Label	People Per Ticket	Limit/Max Quantity	Price Per Ticket	Paid?*	
	reoperernover				
Туре 1	1	100	50		
Type 2	1	100	\$1,000	2	

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.

Tickets/Registration		\sim	98 of 100 remaining
Туре 1			\$
Individual Quantity	1		

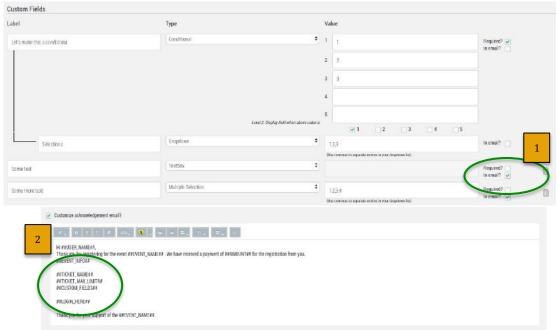
Figure 96: Show available and remaining ticket quantities

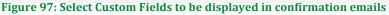
5. **Customize acknowledgement email** – Each registrant will receive an email confirming their registration. You may specify what is included in this notification. Selecting this option will open the WYSIWYG message editor where you may create and design the custom message. Several variables may



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.







- 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.

Save	Cancel	
No. of form vie People register	ews : 1369 red through form : 193	
Please use the Code Snippet	code provided to make the form available on a web page.	
<iframe widt<br="">id=576db01</iframe>	th="80%" height="500" src="https://app.eventuosity.com/open_register.php? 6cd4bd0ff34354ccd&event_id====================================	

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.



Personal Informa	ation								
first name		last name			Tickets/	Registratio	n		
address					- Purchase	туре –			
address					Total Payme	int			
sity	state		zip		Corporate	e/Individual	Donation		
Company/Organizatio	ion	- Rank/Title -		¢					
Meal Preference		Dietary Restrict	ctions		Corporate	e/Individual	Donor Name	5	
Special Seating Requ									
		Account							
		Account name on c							
		name on c	ard	MM	• www		cw		
			ard	ММ	¢ ym	•	CVV		
		name on c	ard r	MM	¢ ym	· •	CVV		
		name on c CC number Billing A	ard r	ММ	¢ ym	· •	cvv		
		name on c CC number Billing A	ard a ddress:	MM	• vm	· •	CVV		
		name on c CC number Billing A	ard a ddress:	MM	• YYYY	\$	CVV		

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.

Confirmed Attendees			
1 Rehman Aleger	🕞 📋 🛓 Keerthi Amerika	🕞 📋 🛓 Christopher A	₽ 🗇
1 Luke Amerika	🕞 📋 🛓 Gina 📷	🕞 📋 🛓 Christopher 📾	D 🗇
🔔 Ryan Smittia	🕞 📋 🛓 Jeffrey	🕞 🍈 💵 erica 🏣	D: 🗇
1 Dimitry Balance	🕞 📋 🛓 Jacqueline Brass	🕞 📋 🔺 Talha B📖	₽ 🗇
上 Hamza 🐜	🕞 📋 🛓 Alexande	🕞 📋 💵 Stanislav Bernard	D: 🗇
1 Micenteller	De 📋 🛓 Jarrett 8	De 📋 💵 mitch Bartann	De 🗇
1 Diane Buttern	🕞 📋 🕹 Anthony	De 📋 🔺 Kerri Barria	R 🗇
1 Zachary Comme	🕞 📋 🛓 Jonathan Campier	🕞 📋 💵 Steven Canada	D: 🗇
🔔 Cortnie California	🕞 📋 🔟 Clare Constant	De 📋 🔺 Lauren Companya	D 🗇
🔔 Jessica Oissee	🕞 📋 💵 Sarah 🕬	🕞 🛗 💵 Gary C	₽ 🗇
🔔 Jeremy 🕮	🕞 📋 🏦 Ash Comm	🕞 📋 🔺 Amanda Omici	D: 🗇
🔔 Brandon Dime	🕞 📋 💵 Brian Data	De 📋 🔺 Elissa Orimu	₽ 🗇
🔔 Amanda Dilih	🕞 📋 💵 Graziella 🕬	🕞 📋 🔺 Christina Dawsina,	Dr 🗇
1. Nick Downs	🕞 📋 🏦 Mike Elimitet	De 📋 🔳 Nicole Financia	R 🗇
🔔 Rachel Filter	🕞 📋 🏦 Stefanie Galinder	De 📋 🔺 Alberto 💷	₽ 🗇
🔟 Elisa 🥯	De 📋 🏦 Toni Garriago	🕞 📋 🛓 Joan 🗪	₽ 🗇
🔔 Dan G	🕞 📋 🏦 Katrina Haman	De 📋 💵 Sana Herr	D: 🗇
🔔 Jamie Homm	🕞 📋 🔺 Kelsey Hamilia	🕞 🍈 🛓 Kristen Heritaan	De 🗇
🔔 Meghan Hollewy	🕞 📋 💵 Sasha Hammerik	De 📋 🔺 Eva H	D: 🗇
🔔 MaryKathrym H	🕞 📋 🛓 Olivia Hamma	🕞 📋 🛓 Herbert H	De 🗇



Figure 100: Confirmed People list populated through Open Registration

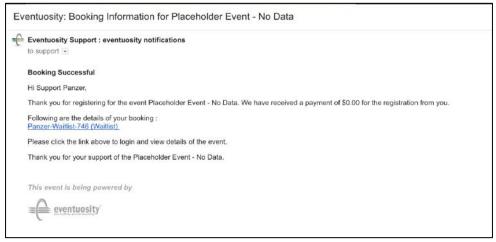


Figure 101: Example confirmation email sent to registered attendee

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

-0	Eventuosity Support via eventuosity to me 🕤	Nov 2	*	*
	Attendee Registered			
	Dear Justin Panzer,			
	A new user Justin Panzer (justing@noemail.com) has registered as an attendee in Canadian Special Events 2017 using the Open Registration form. F and view details of the event.	Nease click <u>her</u>	e to login	1
	This event is being powered by			
	≡ <u>eventuosity</u>			

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.



Dashboard	•	<u>.n_n</u>	
Q Events	\mathbf{Q}		
Calendar	Create or Manage Events	Events Calendar	View Event Schedules
Schedule			
AL Prope	23		<u>.</u>
🖄 Taska			
As Resources	Manage People	View & Manage Tasks	View & Manage Resources
🕼 Dudget & Expenses	*	D	
Reports	(\$) ¹⁰	~	
🖬 tha	Budget & Expenses	View Reports	inhor
Dinder	-	8.0	
1. Registration			
Deckings	Binder	Registration Forms	My Bookings

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.

🗒 Schedule	09/19/2016	5.00 PM	Parcer-10-top Table-190	Click here to	dd Guiet
21 People	Guest Add New Guest Mine 10			Ves	v Event Details
C Tesks	Justin		Panter	justin panael@eventuesity.com	
	116 Research Drive			Betriation	
C. Resources	Ph		18015	6	
Budget & Expenses	2		🐱 Are you attending?		
Beports	BOOKING DETAILS Tickets Purchased: Individual		12		
a lebox	First Hame		Last Nime	Email	
Rote	Address		Address	αy	
Bordan	Sate		20	Company/Organization	
& Registration	Select Rank/Title-	¢ (s	Felect Meal Preference-	Eintary Restlictions	
Bookings	Soroial Scaling Reports				
	Add More People				
	Add More People				
				Cancel	Save
	Confirmed Guest/Total: 7) & Guest One	0			

Figure 104: Bookings module view

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



12	Guest		Address1		
	Registered				
gmail.com			Address2		City
02-491-9641	Adi	nio 🗘	St/Prov		Zip/Pestal Code
.02 431 5041			Company Name		Title
		i.			
Staff Uniform Size Documentation Provided		DL		0	
Add Custom Field Staff Uniform Size Documentation Provided Check-in Date Frequent Traveler]				

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.

Langhorne Event	
Create Form	
Test Form	
Figure 106: Undat	e 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 Support Page (eventuosity.com/support) Eventuosity Resources Library (eventuosity.com/library) Eventuosity YouTube Channel (http://www.youtube.com/user/eventuosity)



	(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
	 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 	 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 	 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
People	not editable	editable	are not editable

Appendix A – Roles and Permissions



	(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
	 Event producer Senior event, marketing, sales staff IT or other internal 	 Department head Meeting or event planner/ producer. Training manager Exhibit house project manager or client account manager 	 Trade show booth captain On-site event coordinators Organizing Team members Client point-of-contact Agency point-of-contact Exhibitors
Examples	central service	- 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
	 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 	 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 	 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
Tasks	not assigned to them	to them	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
	- See above rows for		
	specifics of binder access	- See above rows for specifics	- See above rows for specifics
	associated with different	of binder access associated	of binder access associated
	modules.	with different modules.	with different modules.
	- Access to binder folders	- Access to binder folders for	- Access to binder folders for
	for any item to which	any item to which they are	any item to which they are
	they are assigned	assigned	assigned
	- Cannot create or delete	- Cannot create or delete	- Cannot create or delete
Binder	binder folders	binder folders	binder folders
billdel		binder folders	
	- Reporting provides		
	access only to accessible		
	data and own		
	assignments		
	a) All sub-events	 Reporting provides access 	
	b) My sub-events	only to accessible data and	 Reporting provides access
	c) Contact list in an	own assignments	only to accessible data and
	assigned event	a) All sub-events	own assignments
	d) My People contact list	b) My sub-events	a) My sub-events
	and full data report	c) My People contact list and	b) My People contact list and
	e) My Tasks - open and	full data report	full data report
	complete	d) My Tasks - open and	c) My Tasks - open and
	f) My Resources	complete	complete
	- No budgeting reports	e) My Resources	d) My Resources
	- No binder contents	- No budgeting reports	- No budgeting reports
	reports	- No binder contents reports	- No binder contents reports
Reports	- No Event full data report	- No Event full data report	- No Event full data report
	- Create and send Mail or		· · · · ·
	Chat messages to Admin,		
	SA and Master User only		
	- No Reply All to any		
	message received under		
	and event	- Create and send Mail or Chat	- Create and send Mail or Chat
	- May view Draft	messages to Admin, SA and	messages to Admin, SA and
	messages if tagged to an	Master User only	Master User only
	event in which they are	- No Reply All to any message	- No Reply All to any message
	Staff	received under and event	received under and event
	- May send messages to	- No access to Drafts	- No access to Drafts
	anyone in own	- May send messages to	- May send messages to
	Eventuosity People	anyone in own Eventuosity	anyone in own Eventuosity
Inbox	database	People database	People database
	- Snapshot view does not		
	include Project Dates		- Snapshot view does not
	- No budget status view	- Snapshot view does not	include Project Dates
	- All sub-events included	include Project Dates	- No budget status view
	- Only assigned tasks	- No budget status view	- Only assigned sub-events
	included	- All sub-events included	included
	- Custom WHAT fields	 Only assigned tasks included 	- Only assigned tasks included
Snapshot View	included	- Custom WHAT fields included	- No custom WHAT fields



	Staff Member	Support Team	Attendee
	- Trade show booth staff		- Ticketed/registered guests
	- Internal company		- Customers
	members supporting		- Trainees
	events	- Vendors and suppliers	- Visiting executives
	- Volunteers	- Venue management	- Contributors
	- Administrative	- Facilities staff	- Anyone with an information-
Examples	Assistants	- Service providers	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	cannot make assignments
Creation	No
What, When, Where	 Read only WHAT custom fields are read only Cannot add or change location data. May view and get directions.
	 No view of other Exhibitors. May see Admin and above for contact purposes May contact Admins
People	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
	 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
Reports	 No Event full data report Create and send Mail or
Inbox	 Create and send Mail of 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	 Snapshot view does not include Project Dates No budget status view Only assigned sub- events included Only assigned tasks included
View	- 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.

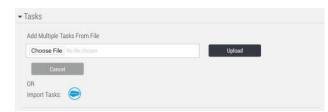
Events may be imported in bulk from the Create or Manage Events module. This functionality is available to assist event managers in moving quickly from spreadsheets to the Eventuosity platform. Start the import by clicking the CSV \rightarrow Eventuosity icon on the top right of the Events page in the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



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

Add Multiple People From File (.csv or .vcf format)		
Choose File No Me chosen	Upload	
Cancel		

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).

Notification :	Settings			
E List View	🖽 Galeridae Varia-	Import Schedule	Export My Schedule	
Add Multiple	Sub Event From F	ile (.csv or .ics format)		
Choose File	e] No file chosen		Uplos	d



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.

	New Workbook New from Template	第N 企業P		File	ta to Import	orn	nat Data	Tools	s Add-ons	He	lp Last e	dit was
	Open	жо			Share	÷	\$ %	.01	00 123 -	Arial	-	10
ndy) =	Open URL Open Recent	ûжО ▶	fx		New ► Open %0		С		D		E	
	Close	жw	1 8			36			Subevent Sta			
Calibri			2		Rename	Ш	02/28/		6:34		02/28/2	
Calibri	Save	ЖS	3 (Make a copy	r	02/27/		10:30		02/27/2	
B	Save As	ΰ₩S	4		Move to		02/27/		6:30		02/27/2	
	Save as Web Page		5	Move to tra	Move to trash	rt	02/26/		7:00		02/26/2	
5	Save Layout		6			Ш	02/26/		8:00		02/26/2	
_	ouro Eujour		7 L		Import	Ш	02/28/		10:00		02/28/2	018
	Import		8 1			L	02/24/	2018	8:00	AM	02/24/2	018
light hon	Share	•	9		Version history ►	Ш	02/25/		10:00		02/25/2	
ner meet	Share		10		D. I.I.		02/24/	2018	10.00	414	02/24/2	018
Dinner - 1 Dinner - 1	Reduce File Size		11		Download as	Ŀ			el (.xisx)	1111		
Registrati			13		1956 1955 2000 25		OpenD	ocume	nt format (.o	ds)		-
Hall Hou	Web Page Preview		14		Email collaborators		PDF do	ocumer	nt (.pdf)			
Setup	Restrict Permissions	•	15		Email as attachment	Web page (.html, zipped) Comma-separated values (.csv, current sheet)						
legistrati			16								et)	
e team i	Passwords		17		Document details							01)
Setup (cc			18		Spreadsheet settings		Tab-se	parateo	l values (.tsv	, curr	ent sheet)	
ow meet Hall Hou	Page Setup		19	-	Print #P	Т						
Hall Hou	Print Area	•	20	-	10.000 (MAR)	Jt						
Tear Dov	Print	ЖP										
	Properties											

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	Туре	Project Start	Project End	Event Start	Event End
		Date	Date	Date	Date
Text	Text	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy
		dd/mm/yyyy	dd/mm/yyyy	dd/mm/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	Event End	Custom Data	Custom Data	Location	Location Address
Time	Time	Field 1	Field 2n	Name	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	Туре	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	Remind Me	Remind	Remind	Remind	Notes
	Time	Date	Me	Assigned	Assigned	



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

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	hh:mm	mm/dd/yyyy	hh:mm
	dd/mm/yyyy	AM/PM	dd/mm/yyyy	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 >> <i>Event Name</i> >> Tasks	Syncs task lists between Eventuosity and Salesforce.com for the open event
Import/Export Schedule	Events >> <i>Event Name</i> >> 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.

Payment Gate stripe	way API Keys		
API Secret Key	**** **** **** 1234		
API Publishable Key	**** **** 1234		
Edit			
Edit			
	evs		
Marketo API K	eys		
Marketo API K	eys	~	
Marketo API K 1 Marketo	eys	~	

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.





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

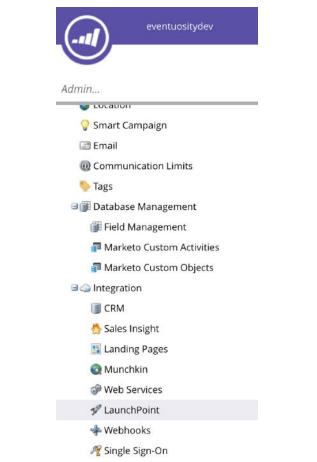


Figure 111: The Launchpoint menu is found in the Marketo Admin panel

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	Туре	Used by	Status	Details
Example Rest Service - get le	Custom	<u>0</u>	Active	View Details
Eventuosity	Custom	<u>0</u>	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.

nstalled Services				
New 🔹 🕫 Service Actions	 Bedit Serv 	rice		
New Service				
Name	Туре	Used by	Status	Details
Name Example Rest Service - get le	Type Custom	Used by	Status Active	Details <u>View Details</u>

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

New Service	_	×
Display Name: Service:	* Eventuosity * Custom	-
Settings		
Description: API Only User:	* Select	*
	CANCEL	EATE

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.



New Service			×
Display Name:	*	Eventuosity	
Service:	*	Custom	*
Settings		1	
Description:	*	Integration with Eventuosity	
API Only User:	*	Select someuser@eventuosity.com some_otheruser@eventuosity.com APluser@eventuosity.com	*
		APluser@eventuosity.com	
		CANCEL	

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.

💡 Smart Campaign	-	
🖃 Email	Web Services	
@ Communication Limits	Manage Web Services	
🍤 Tags	0	
🖃 🇊 Database Management	Endpoint:	
🇊 Field Management	Access Status:	Active
🗊 Marketo Custom Activities	Status Reason:	
🗿 Marketo Custom Objects	User ID:	
🖃 🥥 Integration	Encryption Key:	
🗊 CRM	SOAP API documentation:	http://developers.marketo.com/documentation/soap
🐣 Sales Insight		SAVE CHANGES
🔢 Landing Pages		
🚳 Munchkin	REST API	
💣 Web Services	- Landa	
💅 LaunchPoint	Endpoint:	https://xxx-xxx-xxx .mktorest.com/rest
💠 Webhooks	Identity:	https://152-LFJ-001.mktorest.com/identity
R Single Sign-On	REST API documentation:	http://developers.marketo.com/documentation/rest

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.

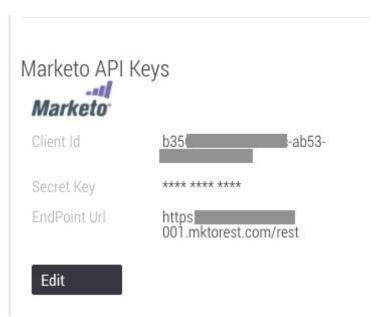


Figure 118: Paste Client ID, Secret Key, and Endpoint URL in My Account



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



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.

©
O

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.

Export Event to Marketo):			×
Folders in Marketo:	Campaign *Select Folder to export event in	to marketo	Export Event	
	121: Export events to a 1	_		



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.

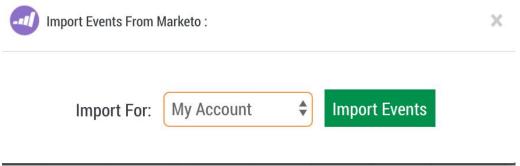


Figure 122: Dialog box guides you through an import of Marketo data

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.

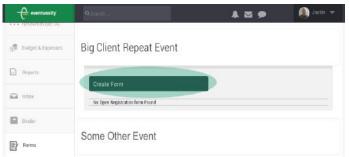


Figure 123: Use Forms to capture lead data that may be passed to Marketo

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

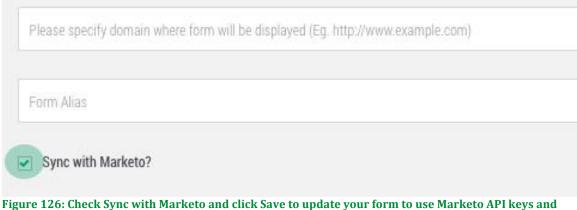
Please note that this box is greyed out and help text appears if your Marketo credentials have not yet been entered in your Eventuosity account. If you see this, save your form and exit to the My Account section of the Eventuosity application (found at the top right of your browser window).



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.



account credentials

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

