activeevents CONFERENCE™

Conference 6.1
Exhibitor Management Quick Reference

This quick start guide outlines the basic workflow for key Exhibitor management tasks in the ActiveEvents Conference system.

To complete these tasks, log in to the Conference Administrator as a user with the specified security role. When following these instructions, start a task from the menu bar at the top of the interface. When steps refer to “the left navigation bar,” choose an option in the list of links on the left of the page.

For detailed instructions, see the Conference documents and online help at http://www.wingateweb.com/support.

This document includes these sections:

1: Signing Up an Exhibitor

NOTE
To create a new exhibitor record, you must have a System Administrator or Exhibitor Administrator security role on your user account.

Exhibitors can sign up for your event through the Exhibitor Resource Center web site. As necessary, you can complete the sign-up process on behalf of an exhibitor.

1. Create an exhibitor record and specify the owner.

   Exhibitors > **Add New**

2. On the General Exhibitor Information page, change the status to **Approved**.
3. Complete the company profile and contacts.

   In the exhibitor record, choose these options on the left navigation bar:

   Edit Exhibitor Info > **Company Profile**
   Edit Exhibitor Info > **Contacts**

4. Choose booth or marketing packages.

   In the exhibitor record, choose Edit Exhibitor Info > **Invoices** on the left navigation bar, then click **Add an Invoice** and choose packages.

5. Enter the payment information or send an invoice.

   On the invoice page, choose **Invoice Options**

6. Assign the exhibitor to a booth.

   In the exhibitor record, choose Edit Exhibitor Info > **Booths** on the left navigation bar.

2: Managing Exhibitor Records

NOTE
To complete Management tasks, you must have a System Administrator, Exhibitor Administrator, or Exhibitor Owner security role on your user account.

After an exhibitor has signed up for your event, you can complete these management tasks, as appropriate.

1. Search for existing exhibitor records.

   Exhibitors > **Search**

2. On the General Exhibitor Information page, change the status or edit custom fields, as appropriate.
3. Add invoices.

   In the exhibitor record, choose Edit Exhibitor Info > **Invoices** on the left navigation bar, then click **Add an Invoice** and choose packages.

4. Update invoices, packages, and payments.

   Edit Exhibitor Info > Invoices > **Invoice Options**

5. Send invoices and order confirmations.

   In the exhibitor record, choose these options on the left navigation bar:

   Edit Exhibitor Info > Invoices > **Print Invoice**
   OR
   Edit Exhibitor Info > Invoices > **Email Invoice**
   OR
   Edit Exhibitor Info > Invoices > **Email Confirmation**

6. As necessary, complete tasks on behalf of the exhibitor.

   In the exhibitor record, choose Exhibitor Tasks > **All Tasks**

   (For details on the Add/Delete Registrants task, see 3: Registering an Exhibitor’s Attendees on this page.)

3: Registering an Exhibitor’s Attendees

NOTE
To complete exhibitor registration tasks, you must have a System Administrator, Exhibitor Administrator, or Exhibitor Owner security role on your user account.

After an exhibitor has signed up for your event, that exhibitor can register their attendees using the Add/Delete Registrants task. As necessary, you can complete attendee registration on behalf of an exhibitor.

1. If necessary, create Registration Codes for Exhibitor Participants. (If your administrator configured Reg Code Rules for exhibitor types, the codes are automatically generated for each exhibitor.)

   In the exhibitor record, choose Exhibitor Admin Tasks > **Create/Edit Reg Codes** on the left navigation bar.

2. Register attendees.
   - In the exhibitor record, choose Edit Exhibitor Info > **Registration** on the left navigation bar.
   - Under the registration code to which you want to add a registrant, click **ADD/DELETE**.
   - Complete the **First Name**, **Last Name**, **Title**, and **Email** fields for each person you want to register with this registration code.
   - If requested, enter complete payment information.

4: Viewing and Exporting Leads

If the exhibitor rented a lead capture unit from ActiveEvents, you can view and export the exhibitor's leads during or after the event.

In the exhibitor record, choose Exhibitor Admin Tasks > **View Leads** on the left navigation bar and then click **Export**.

5: Running Exhibitor Reports

1. View exhibitor leads by day or other lead reports about retrieval devices, retrieval order, and terminal IDs.

   Reports > Exhibitor > **Lead Reports**
2. View basic information about exhibitors.

   Reports > Exhibitor > **Exhibitor Basic Info**
3. View exhibitor files for downloading.

   Reports > Exhibitor > **Exhibitor Files Report**
4. View payment transactions for exhibitor orders.

   Reports > Exhibitor > **Exhibitor Payment Transactions**
5. View the completion status of tasks for approved exhibitors.

   Reports > Exhibitor > **Exhibitor Task Report**
6. View the schedule for staff that are working booths.

   Reports > Exhibitor > **Participant Schedule**
7. View the participants who have not registered for the event.

   Reports > Exhibitor > **Participants Not Registered**