



2B-EVENTS 365 USER GUIDE

Table of Contents

INTRODUCTION.....	3
ABOUT 2B-EVENTS 365.....	3
GETTING STARTED WITH 2B-EVENTS 365.....	4
INSTALLATION OF 2B-EVENTS 365 IN DYNAMICS	4
INITIAL CONFIGURATION OF 2B-EVENTS 365.....	4
NAVIGATING THE CORE 2B-EVENTS 365 APPLICATION.....	9
DASHBOARDS	9
EVENTS.....	10
Creating New Events	10
Creating Related Events (Sub-Events).....	11
CONTACTS.....	14
Creating New Contacts.....	14
View Existing Contacts	16
TICKETS	17
Creating New Tickets.....	17
View or Update Existing Tickets.....	21
BULK PRINT ACTIVE TICKETS.....	22
SCANS	25
View Ticket Scan Information	26
Enter Scans Manually	26
EXHIBITOR LEADS.....	27
View Exhibitor Leads	28
NAVIGATING THE 2B-EVENTS 365 MOBILE APPLICATION FOR ADMINISTRATORS.....	30
DASHBOARDS	30
EVENTS.....	31
CONTACTS.....	32
TICKETS	33
MOBILE TICKET/BADGE PRINTING.....	34

SCANS	41
EXHIBITOR LEADS.....	44
2B-EVENTS MOBILE APP FOR EVENT STAFF.....	47
2B-EVENTS MOBILE APP FOR EXHIBITORS.....	54
INFORMATION ON OPTIONAL WEB PORTAL	55
HELPFUL LINKS	56
ABOUT 2B SOLUTIONS, INC.	59

INTRODUCTION

ABOUT 2B-EVENTS 365

2B-Events 365 is a solution built for Microsoft Dynamics 365 to give you event attendance and ticket management. It's web-based and mobile-optimized to enable event management, event staff and exhibitors to work from any device, anywhere.

- **Attendance management** – Event staff can use a mobile application to scan an attendee's QR Code to manage entry to an event.
- **Exhibitor lead retrieval** – Give exhibitors permission to access your mobile application from their phone for lead retrieval.
- **Exhibitor management** - Allow exhibitors access to their lead information with the optional web portal.
- **Ticket/badge printing** – Print tickets or badges before an event or on-site using a Bluetooth printer.
- **Registration** – Allow attendees to register for upcoming events with the optional web portal.
- **QR Code Generator** – Automatically generate QR Codes to include in confirmation emails and/or attendee tickets/badges.
- **Analytics** – Administrators can view dashboards for analytics and other data via a mobile application or the web-based access of Dynamics 365. Export data to Microsoft Excel for additional reporting.

GETTING STARTED WITH 2B-EVENTS 365

INSTALLATION OF 2B-EVENTS 365 IN DYNAMICS

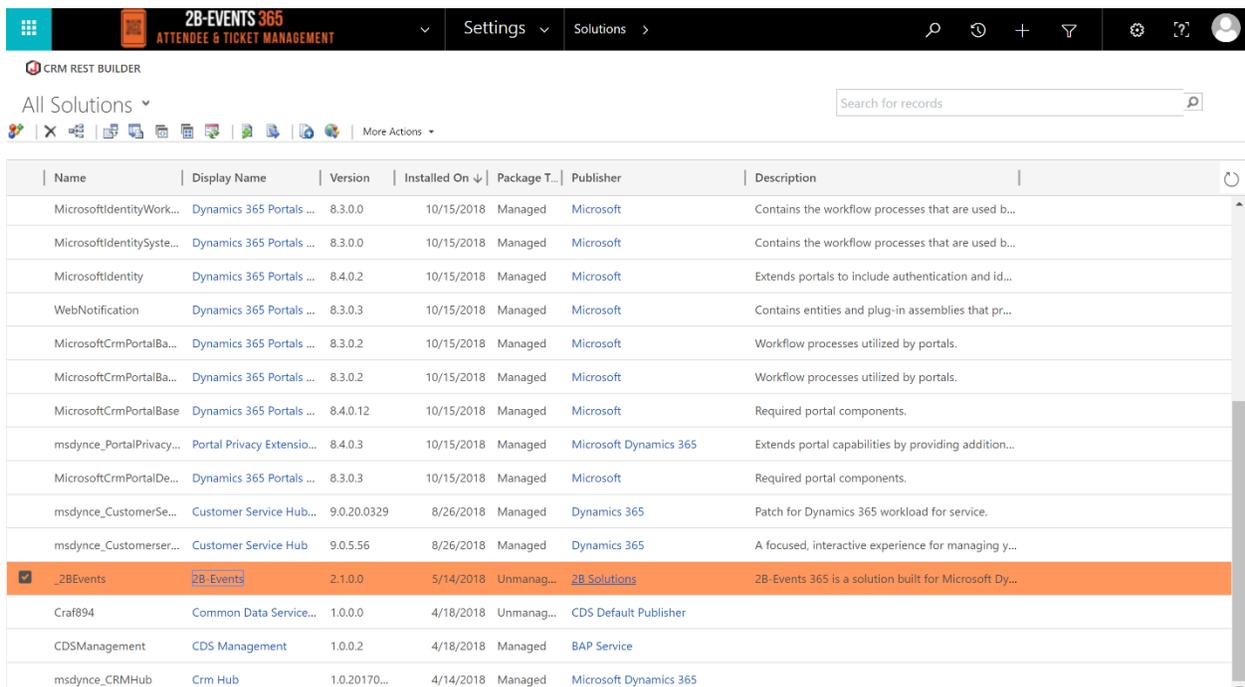
To Install: Save the files to your desktop and import the .zip file into your Dynamics 365 instance by choosing Settings/Solutions/Import. Once the solution completes the import, choose Publish All Customizations from the ribbon bar and continue with the instructions in the document to configure the solution.

Before you continue with the following, you should have already installed and published the 2B-EVENTS 365 solution into your Dynamics 365 instance.

INITIAL CONFIGURATION OF 2B-EVENTS 365

Step 1. License Registration

In Dynamics 365, navigate to Settings/Solutions and open the entry called **_2BEvents**.



The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. The top navigation bar includes 'Settings' and 'Solutions'. Below the navigation bar, there is a search bar and a list of solutions. The solution '_2BEvents' is highlighted in orange, indicating it is selected. The table below lists various solutions installed in the instance.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
MicrosoftIdentityWork...	Dynamics 365 Portals ...	8.3.0.0	10/15/2018	Managed	Microsoft	Contains the workflow processes that are used b...
MicrosoftIdentitySyste...	Dynamics 365 Portals ...	8.3.0.0	10/15/2018	Managed	Microsoft	Contains the workflow processes that are used b...
MicrosoftIdentity	Dynamics 365 Portals ...	8.4.0.2	10/15/2018	Managed	Microsoft	Extends portals to include authentication and id...
WebNotification	Dynamics 365 Portals ...	8.3.0.3	10/15/2018	Managed	Microsoft	Contains entities and plug-in assemblies that pr...
MicrosoftCrmPortalBa...	Dynamics 365 Portals ...	8.3.0.2	10/15/2018	Managed	Microsoft	Workflow processes utilized by portals.
MicrosoftCrmPortalBa...	Dynamics 365 Portals ...	8.3.0.2	10/15/2018	Managed	Microsoft	Workflow processes utilized by portals.
MicrosoftCrmPortalBase	Dynamics 365 Portals ...	8.4.0.12	10/15/2018	Managed	Microsoft	Required portal components.
msdynce_PortalPrivacy...	Portal Privacy Extensio...	8.4.0.3	10/15/2018	Managed	Microsoft Dynamics 365	Extends portal capabilities by providing addition...
MicrosoftCrmPortalDe...	Dynamics 365 Portals ...	8.3.0.3	10/15/2018	Managed	Microsoft	Required portal components.
msdynce_CustomerSe...	Customer Service Hub...	9.0.20.0329	8/26/2018	Managed	Dynamics 365	Patch for Dynamics 365 workload for service.
msdynce_Customerser...	Customer Service Hub	9.0.5.56	8/26/2018	Managed	Dynamics 365	A focused, interactive experience for managing y...
<input checked="" type="checkbox"/>	_2BEvents	2.1.0.0	5/14/2018	Unmanag...	2B Solutions	2B-Events 365 is a solution built for Microsoft Dy...
Craf894	Common Data Service...	1.0.0.0	4/18/2018	Unmanag...	CDS Default Publisher	
CDSManagement	CDS Management	1.0.0.2	4/18/2018	Managed	BAP Service	
msdynce_CRMHub	Crm Hub	1.0.20170...	4/14/2018	Managed	Microsoft Dynamics 365	

Open the solution, and you should be in the **Configuration** node of your Solution environment.



In the right pane, you will see the License Registration information. Enter the token key provided to you into the space provided and choose **Submit**.

NOTE: The token code is sent to you in a separate email. Copy and paste the code into the text box.

Once successfully submitted, click the **Refresh Page** button and you should see detailed license registration information. If it does not appear right away, wait a couple of minutes and select **Refresh Page** again.

PowerApps

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: 2B-Events
Configuration

Solution 2B-Events

- Information
- Configuration
- Components
- Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
- Plug-in Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Model-driven Apps
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources

2B Solutions
Be Mobile. Be Connected.

Solution Version: 2.1.0.0 Refresh Page

License Registration ^

Token Key ?
hpz4IM6FvelYnnBSctBJRN1XesvYr4zVBal5rB9hbVw=

License Type: **Trial**

Licensed Users: **5**

Expiration Date: **Tue Jan 01 2019**

Update

Solution Configuration ^

Users ^

Status: Existing

Step 2. Solution Configuration

In the area below the License Registration information, you should now see Solution Configuration and Users.

PowerApps

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: 2B-Events
Configuration

Solution 2B-Events

- Information
- Configuration
- Components
- Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
- Plug-in Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Model-driven Apps
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources

2B Solutions
Be Mobile. Be Connected.

Solution Version: 2.1.0.0 Refresh Page

License Registration ^

Token Key ?
hpz4IM6FvelYnnBSctBJRN1XesvYr4zVBal5rB9hbVw=

License Type: **Trial**

Licensed Users: **5**

Expiration Date: **Tue Jan 01 2019**

Update

Solution Configuration ^

Configure

Users ^

Select Solution Configuration and then select the **Configure** button.

Note: You must select **Configure** to ensure a fully functioning solution.

Once the configuration is successful, the progress bar below will complete (if any popup messages appear, choose “Ok” and the progress bar will complete).

Step 3. Users

You will need assign or unassign 2B-EVEENTS 365 licenses for a list of users. The gray label in the top right corner indicates the number of 2B-EVENTS 365licenses that are available for assignment and how many are currently assigned.

The screenshot shows the PowerApps Solution Configuration interface. The left navigation pane is expanded to 'Configuration' > 'Users'. The main content area shows the 'Users' section with a dropdown menu set to 'Assigned Users'. A yellow highlight is placed over the '5/5 Licensed Users' label. Below the dropdown is a table of users with checkboxes for selection and a 'Submit' button.

Status	Full Name	Business Unit
<input checked="" type="checkbox"/>	Alan Camp	2bevents365dev
<input checked="" type="checkbox"/>	George Moreno	2bevents365dev
<input checked="" type="checkbox"/>	Jeff Cross	2bevents365dev
<input checked="" type="checkbox"/>	Shawn Shelton	2bevents365dev
<input checked="" type="checkbox"/>	Tiffany Lisowski	2bevents365dev

Use the dropdown to toggle from a list of inactive, active, or all users. Choose “All Users”, select which users you want to license for 2B-EVENTS 365 and choose **Submit**.

PowerApps

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: 2B-Events
Configuration

Solution 2B-Events

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sqlk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Model-driven Apps
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources

Solution Configuration

Users

5/5 Licensed Users

Assign or unassign 2B-Events licenses to users. ?

All Users

Status	Full Name	Business Unit
<input type="checkbox"/>	# Sales	2bevents365dev
<input type="checkbox"/>	# Support	2bevents365dev
<input checked="" type="checkbox"/>	Alan Camp	2bevents365dev
<input type="checkbox"/>	Appsource User	2bevents365dev
<input type="checkbox"/>	Business Application Platform Service account	2bevents365dev
<input type="checkbox"/>	Delegated Admin	2bevents365dev

Submit

Status: Existing

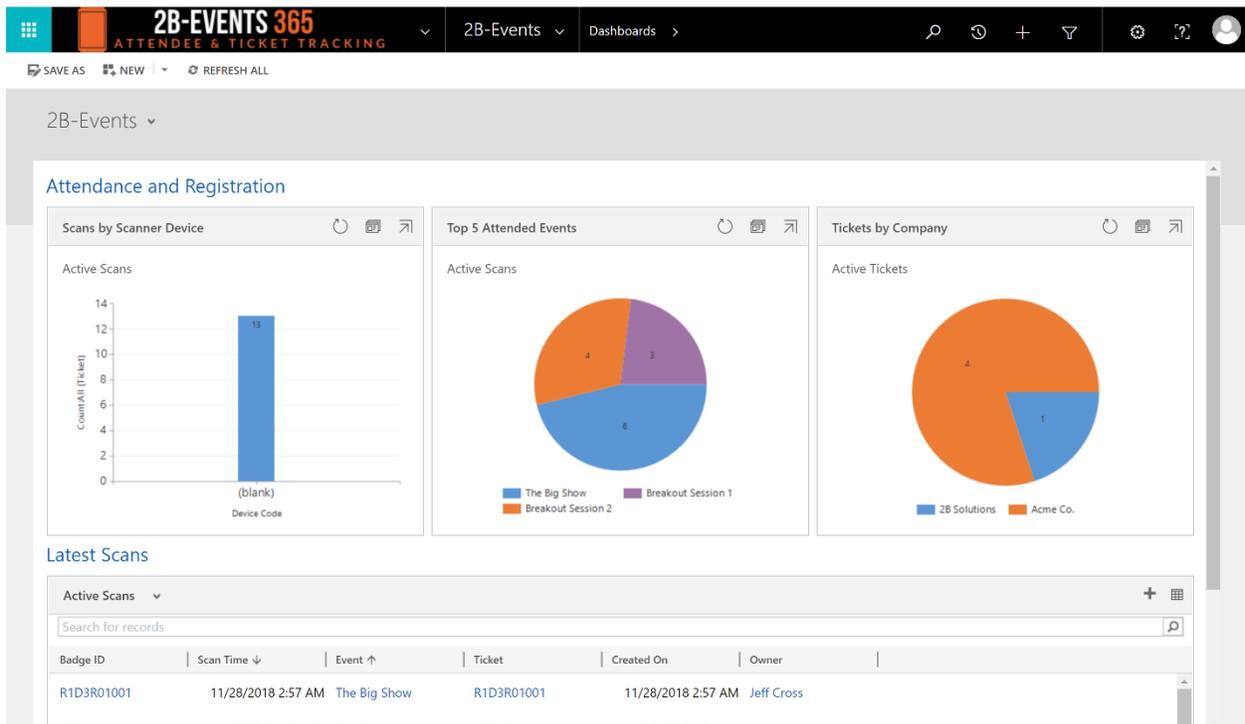
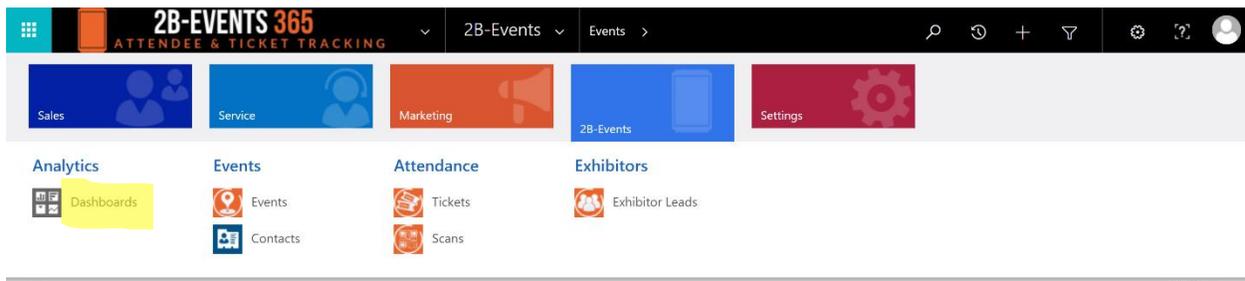
License Registration, Solution Configuration and Users Complete!

NAVIGATING THE CORE 2B-EVENTS 365 APPLICATION

DASHBOARDS

Included with 2B-EVENTS 365 is a Dashboard showing attendance and registration information such as Scans by Device, Top 5 Attended Events, Tickets by Company and Latest Scans. New Dashboards can be created to show whatever data is relevant to you. See [Create and Edit Dashboards](#).

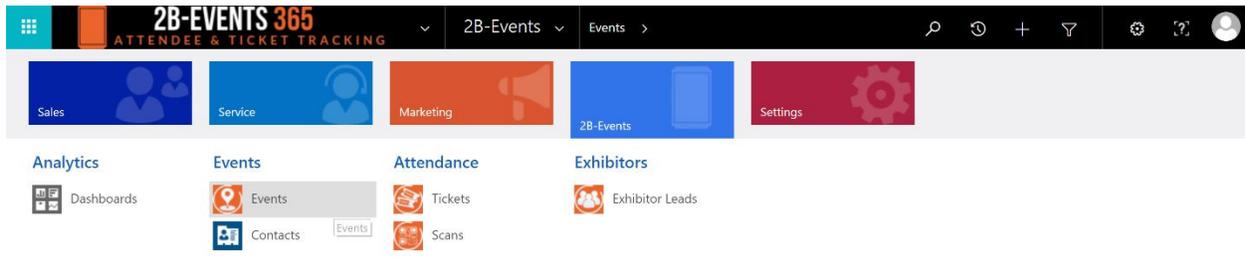
To Navigate to the 2B-Events Dashboard, go to 2B-EVENTS → Analytics → Dashboards



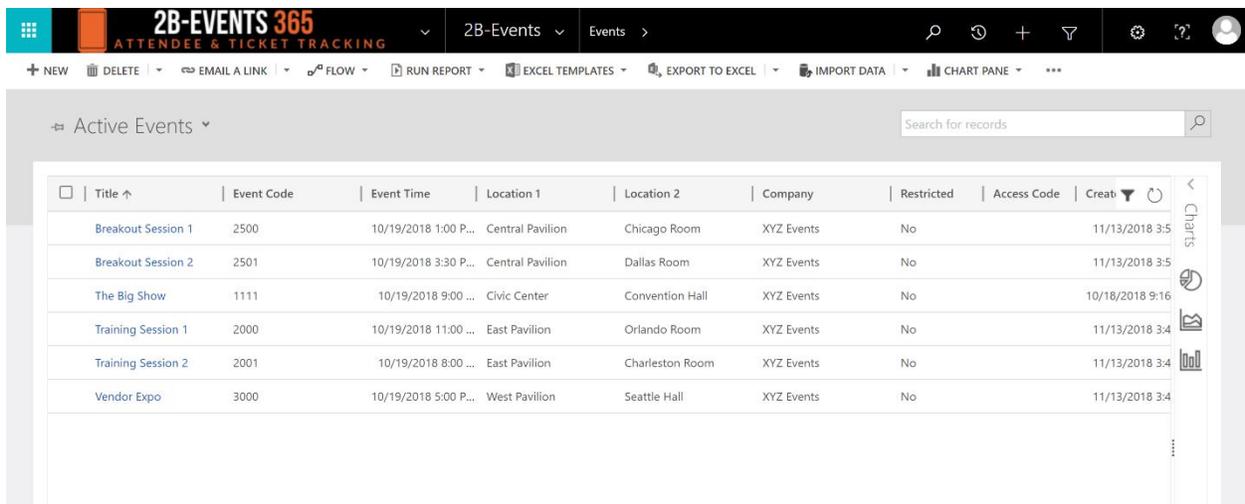
EVENTS

CREATING NEW EVENTS

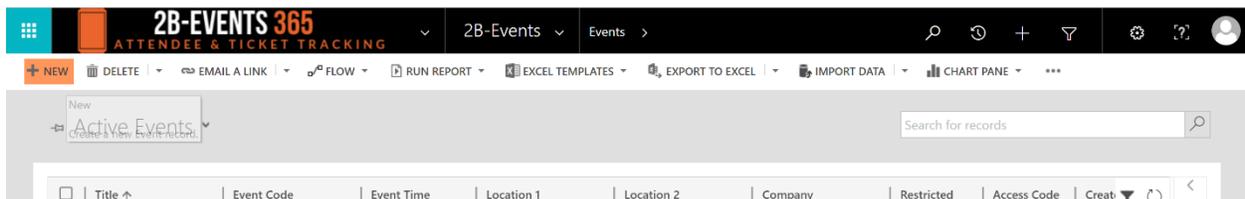
1. To navigate to Events, go to 2B-EVENTS → Events



2. The view of Active Events is the default view. (To view Inactive Events, use the arrow to the right of Active Events.) To create new or edit existing views, see [Create & Edit Views](#).



3. To enter a New Event, click +NEW.



4. Enter information within the blank New Event form and then SAVE & CLOSE. While the default New Event form cannot be modified, new fields and forms can be created to reflect the information you need. See [Create and Edit Fields](#) (Attributes) and [Create & Design Forms](#).

2B-EVENTS 365
ATTENDEE & TICKET TRACKING

2B-Events > Events > New Event

SAVE SAVE & CLOSE NEW FLOW FORM EDITOR

EVENT : INFORMATION
New Event

Title * Event Time

General

Title *

Event Code

Event Time

Location 1

Location 2

Restricted No

Access Code

Company

Company Code

Owner * Tiffany Lisowski

ACTIVITIES NOTES

There aren't any notes to show. To get started, enter a note.

Related Events

Title ↑	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Created On	Modified On	Modified By						

Active

2B-EVENTS 365
ATTENDEE & TICKET TRACKING

2B-Events > Events > The Big Show

NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG FLOW

EVENT : INFORMATION
The Big Show

Title * The Big Show Event Time 10/19/2018 9:00 AM

General

Title * The Big Show

Event Code 1111

Event Time 10/19/2018 9:00 AM

Location 1 Civic Center

Location 2 Convention Hall

Restricted No

Access Code

Company XYZ Events

Company Code 2222

Owner * Jeff Cross

ACTIVITIES NOTES

Enter a note

Related Events

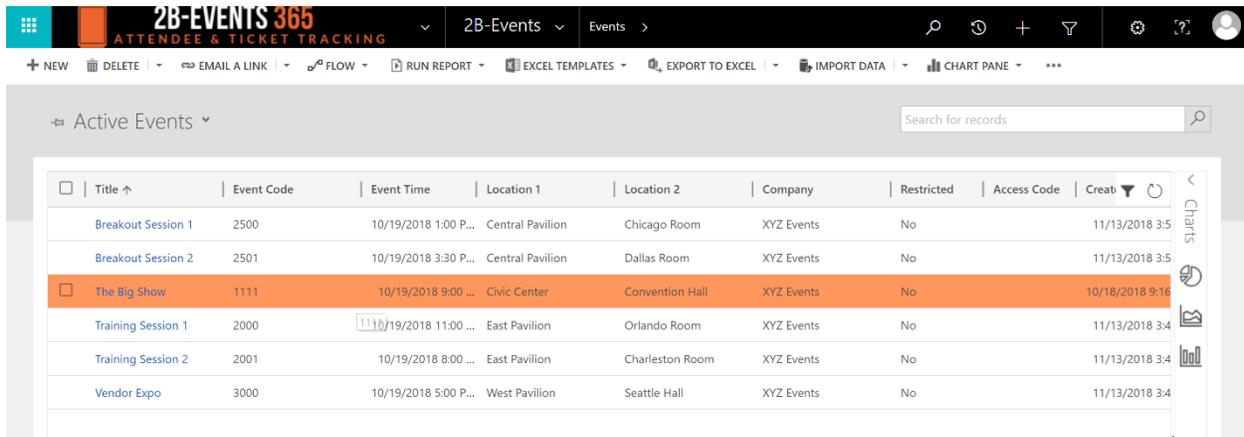
Title ↑	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Breakout Session 1	2500	10/19/2018 1:00 ...	Central Pavilion	Chicago Room	XYZ Events	No		11/13/2018 3:51 ...
Breakout Session 2	2501	10/19/2018 3:30 ...	Central Pavilion	Dallas Room	XYZ Events	No		11/13/2018 3:53 ...
Created On	10/18/2018 9:16 PM	Modified On	10/18/2018 9:16 PM	Modified By	Jeff Cross			

Active

CREATING RELATED EVENTS (SUB-EVENTS)

Related Events can be created to account for breakout sessions, sub-events, etc.

1. Navigate to the main Event. Go to 2B-Events → Events → Double-click on the appropriate Active Event.



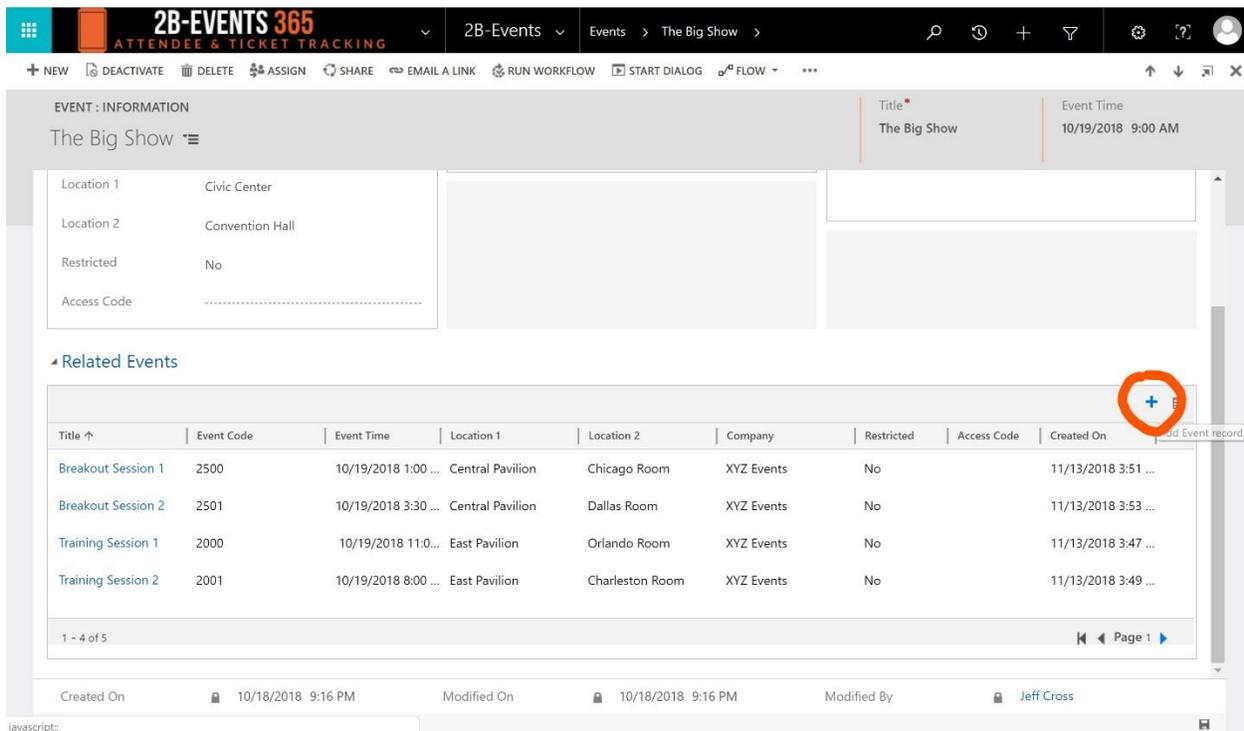
2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events > Events >

Active Events

Title	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Breakout Session 1	2500	10/19/2018 1:00 P...	Central Pavilion	Chicago Room	XYZ Events	No		11/13/2018 3:5
Breakout Session 2	2501	10/19/2018 3:30 P...	Central Pavilion	Dallas Room	XYZ Events	No		11/13/2018 3:5
The Big Show	1111	10/19/2018 9:00 ...	Civic Center	Convention Hall	XYZ Events	No		10/18/2018 9:16
Training Session 1	2000	11/10/19/2018 11:00 ...	East Pavilion	Orlando Room	XYZ Events	No		11/13/2018 3:4
Training Session 2	2001	10/19/2018 8:00 ...	East Pavilion	Charleston Room	XYZ Events	No		11/13/2018 3:4
Vendor Expo	3000	10/19/2018 5:00 P...	West Pavilion	Seattle Hall	XYZ Events	No		11/13/2018 3:4

2. Scroll down to Related Events and click +.



2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events > Events > The Big Show >

EVENT : INFORMATION

The Big Show

Title: The Big Show | Event Time: 10/19/2018 9:00 AM

Location 1: Civic Center | Location 2: Convention Hall | Restricted: No | Access Code:

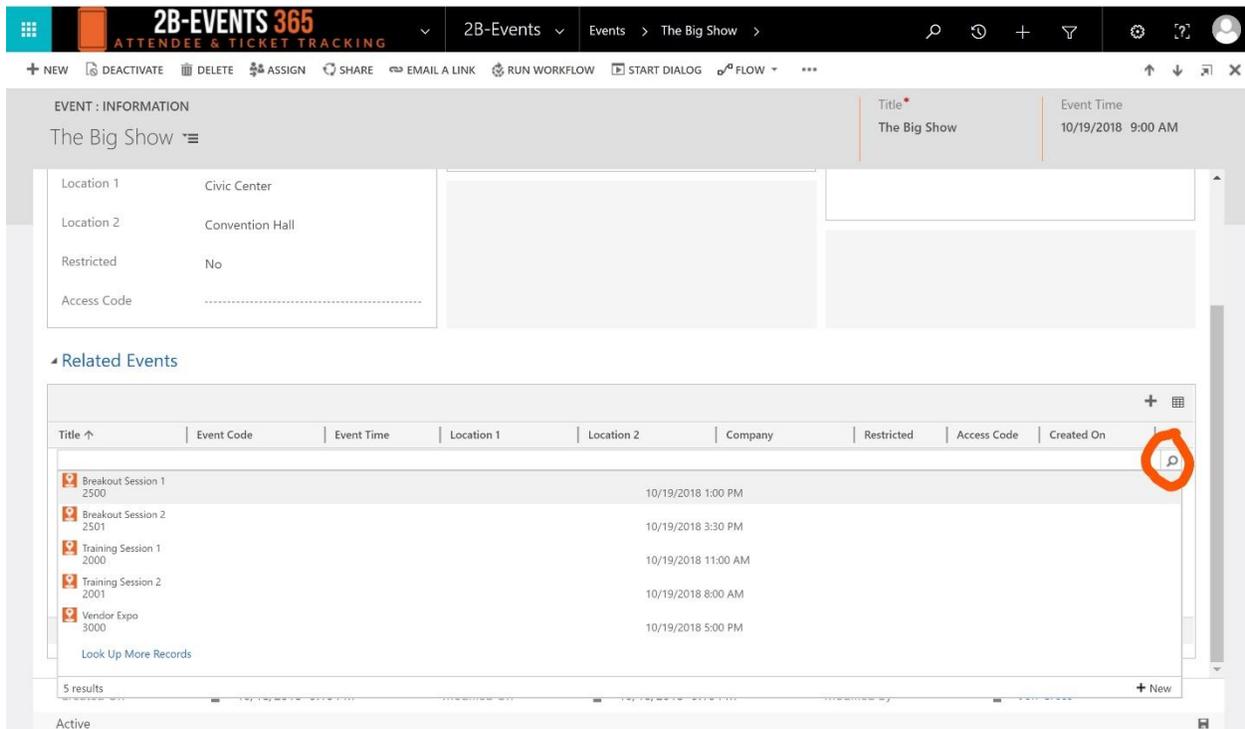
Related Events

Title	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Breakout Session 1	2500	10/19/2018 1:00 ...	Central Pavilion	Chicago Room	XYZ Events	No		11/13/2018 3:51 ...
Breakout Session 2	2501	10/19/2018 3:30 ...	Central Pavilion	Dallas Room	XYZ Events	No		11/13/2018 3:53 ...
Training Session 1	2000	10/19/2018 11:0...	East Pavilion	Orlando Room	XYZ Events	No		11/13/2018 3:47 ...
Training Session 2	2001	10/19/2018 8:00 ...	East Pavilion	Charleston Room	XYZ Events	No		11/13/2018 3:49 ...

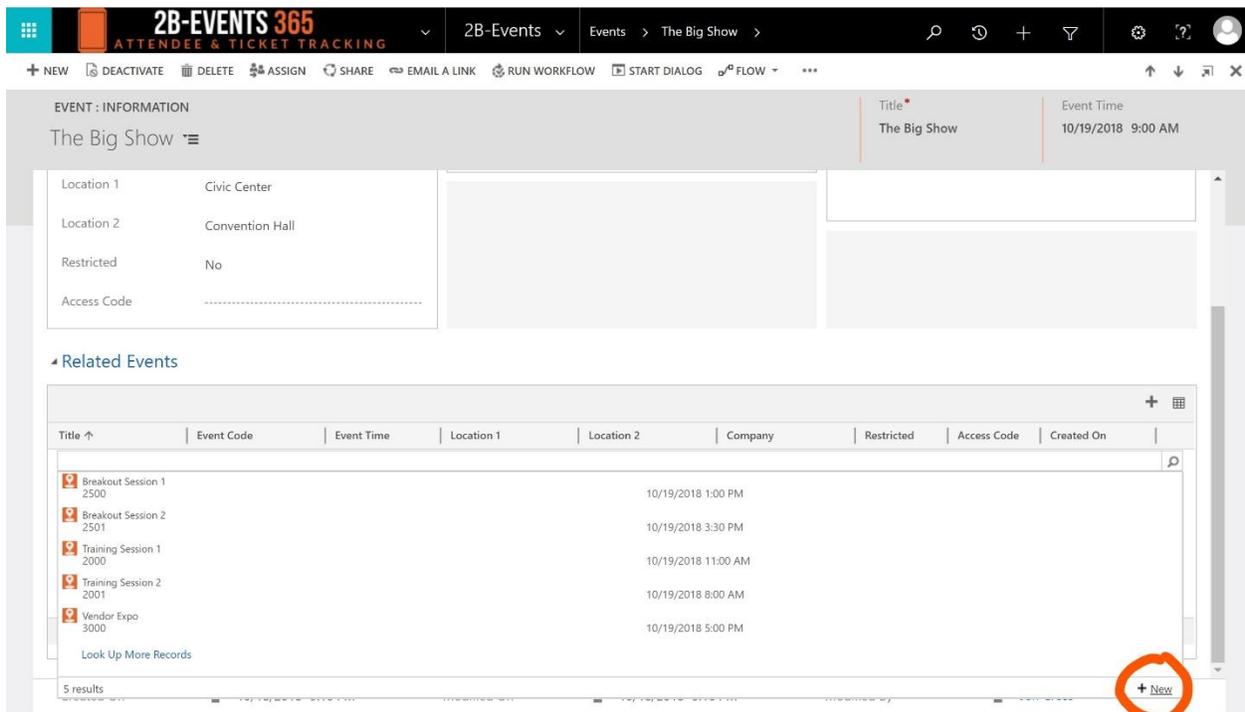
1 - 4 of 5 | Page 1

Created On: 10/18/2018 9:16 PM | Modified On: 10/18/2018 9:16 PM | Modified By: Jeff Cross

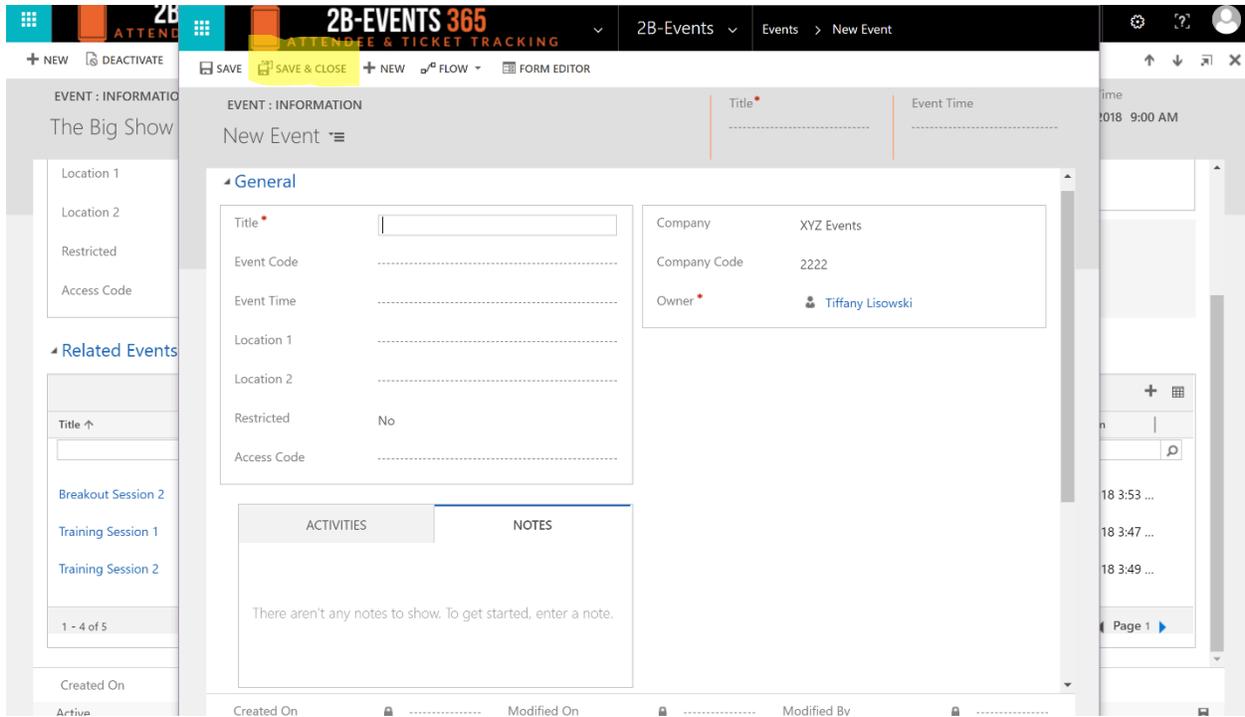
3. To relate an Event that already exists, click the search icon and search for the Event.



4. To relate a new related Event, click +New.



5. A New Event form will pop up. Enter pertinent information and SAVE & CLOSE.

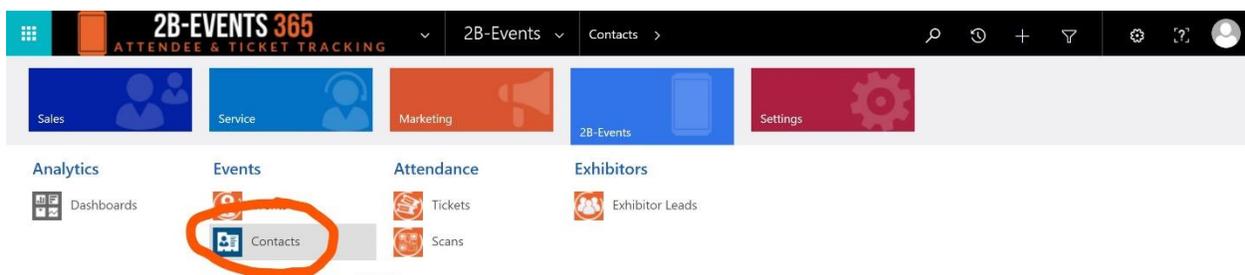


CONTACTS

CREATING NEW CONTACTS

2B-EVENTS uses the Contacts functionality available with Dynamics 365. To learn more about Contacts, see [Work with Accounts and Contacts in Customer Engagement Apps](#).

1. Navigate to 2B-EVENTS → Events → Contacts



2. The default view shows Active Contacts. (See [Create and Edit Views](#) to learn more about creating new views.) Click +NEW to create a new Contact.

2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events > Contacts >

NEW DELETE EMAIL A LINK FLOW RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

New Active Contacts Create a new Contact record

Search for records

Full Name ↑	Email	Company Name	Business Phone
George Moreno	George@2bsolutions...	2B Solutions	
Jeff Cross	jeff@2bsolutions.net	2B Solutions	2054089991
John Smith	john@email.com	Acme Co.	773-555-1212
Mister Krabs	mkrabs@underthec.co...	Acme Co.	836-555-5555
Patrick Star	Patrick@underthec.com	Acme Co.	334-444-4444
Portal Customer	customer@contoso.co...		425-555-5555
Sandy Cheeks	sandy@underthec.com	2B Solutions	404-555-5555
Spongebob Squarepants	sb@underthec.com	Acme Co.	703-555-5555
Squidward Tentacles	squid@underthec.com	Acme Co.	202-555-5555
Susan Johnson	susan@email.com	Acme Co.	703-555-1212
System Administrator	admin@contoso.com		425-555-5555
Tiffany Lisowski	tiffany@2bsolutions.c...	2B Solutions	205-408-9991
Tim Jones	tim@email.com	Acme Co.	404-555-1212

1 - 13 of 13 (0 selected) All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Page 1

- Enter information in the 2B-EVENTS Contact form. The 2B-EVENTS Contact form cannot be edited. However, new forms and fields can be created. See [Create and Edit Fields \(Attributes\)](#) and [Create & Design Forms](#) to learn more. Click SAVE & CLOSE.

2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events > Contacts > New Contact

SAVE SAVE & CLOSE NEW FORM FLOW

CONTACT : 2B-EVENTS CONTACT

New Contact

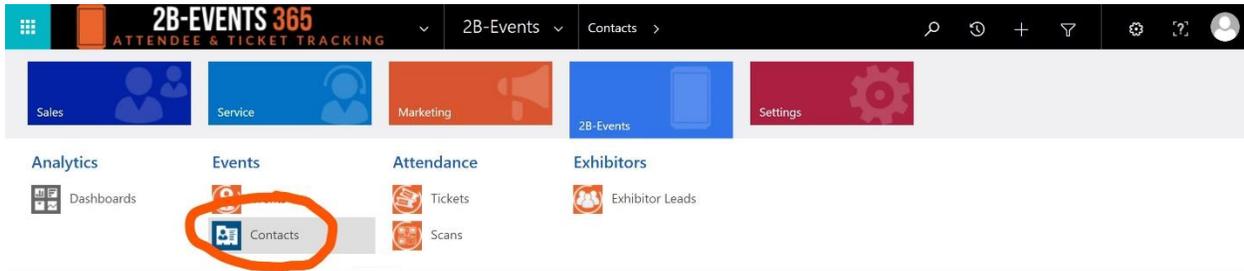
Owner Tiffany Lisowski

Summary

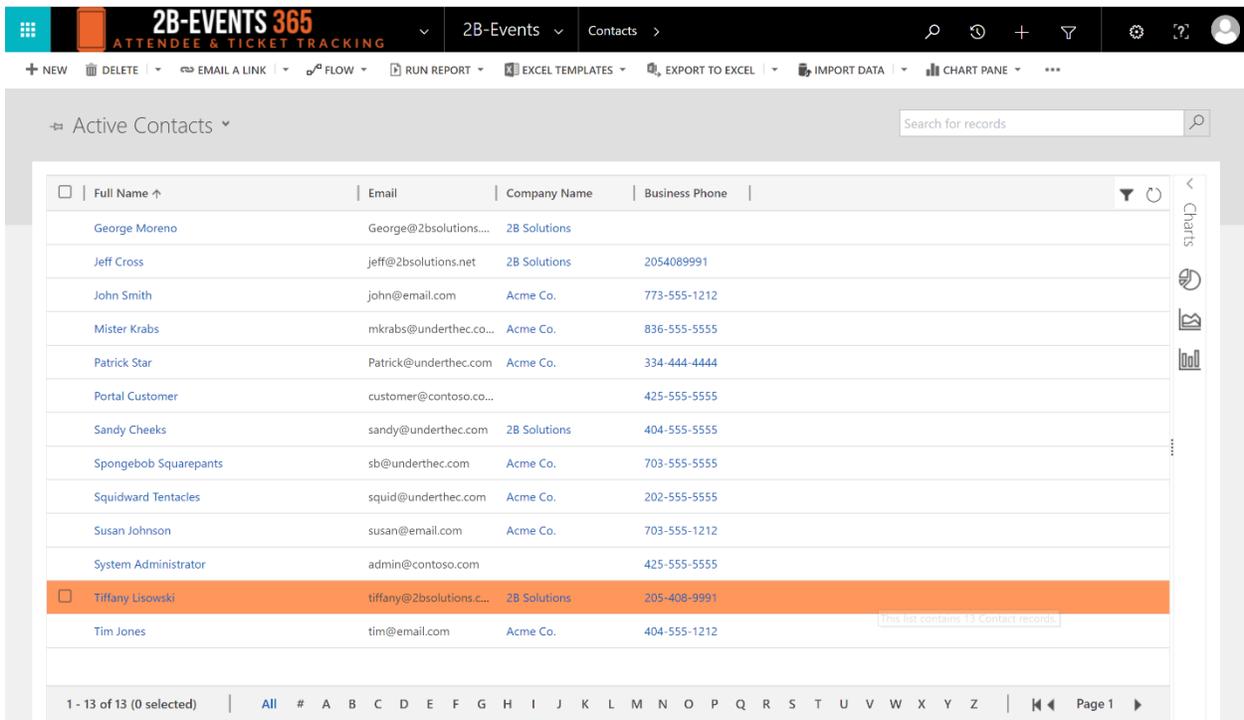
CONTACT INFORMATION	POSTS	ASSISTANT	ACTIVITIES	NOTES	TICKETS
Full Name * First Name * Last Name * Job Title Account Name Email Business Phone Mobile Phone Fax Preferred Method of Contact Any Address				There aren't any notes to show. To get started, enter a note.	Badge Number Contact To enable this content, create the record. Company RECENT OPPORTUNITIES Topic Est. Revenue Est. Cl To enable this content, create the record.

VIEW EXISTING CONTACTS

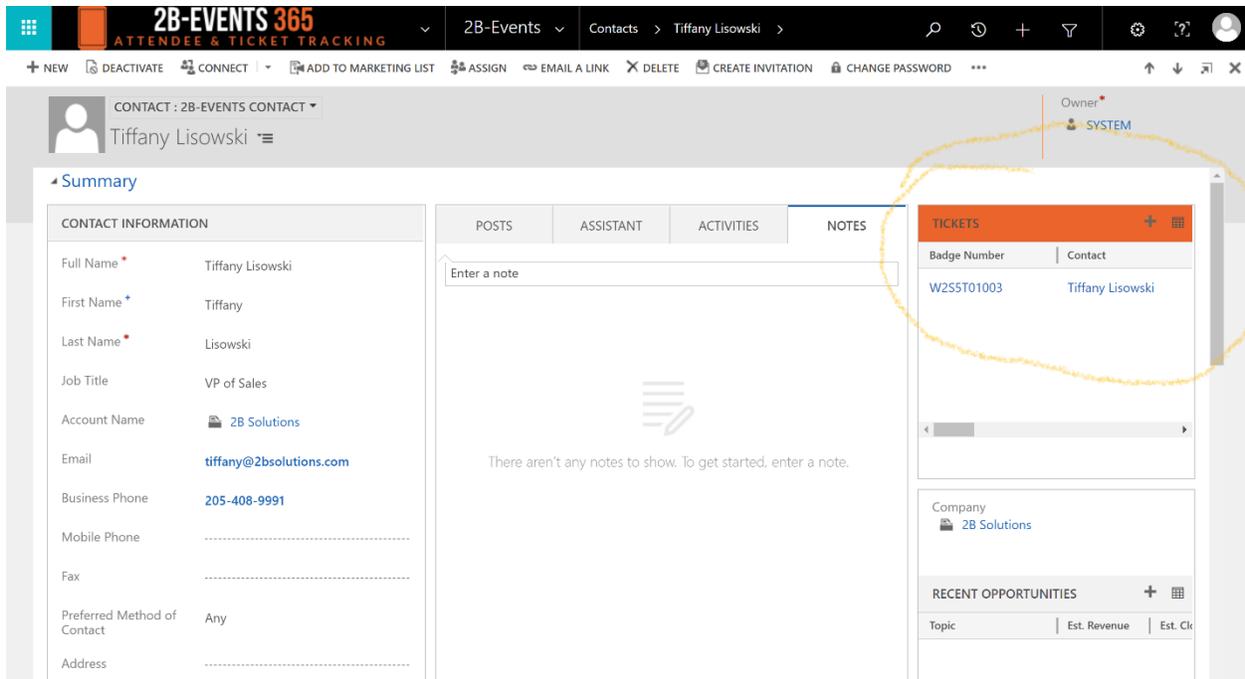
1. Navigate to 2B-EVENTS → Events → Contacts



2. Double-click on the Contact record.



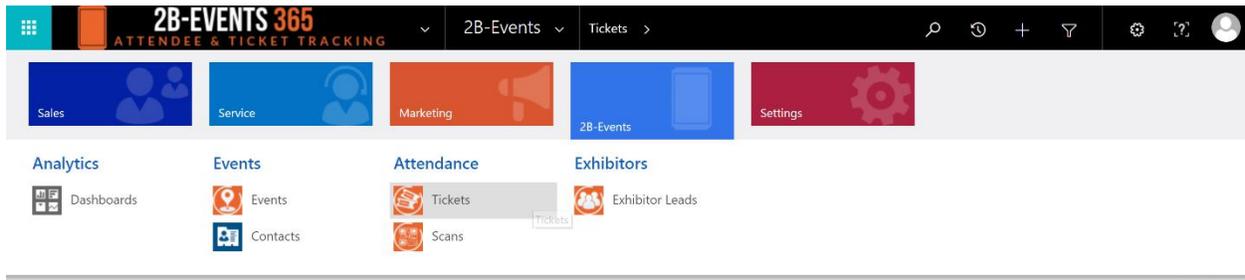
3. On the 2B-EVENTS Contact form, sections showing Ticket information related to the Contact is located on the right.



TICKETS

CREATING NEW TICKETS

1. Navigate to 2B-EVENTS → Tickets



2. The default view shows Active Tickets. (See [Create and Edit Views](#) to learn more about creating new views.)

2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events Tickets

NEW DELETE EMAIL A LINK FLOW RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Active Tickets Search for records

Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	
S6W8Y01009	Sandy Cheeks	The Big Show	No	Sandy	Cheeks	Karate Instructor	2B Solut
R1D3R01001	Jeff Cross	The Big Show	Yes	Jeff	Cross	CEO	2B Solut
X5P4C01002	Susan Johnson	The Big Show	Yes	Susan	Johnson	CFO	Acme C
S9S5W01005	Tim Jones	The Big Show	Yes	Tim	Jones	CMO	Acme C
C6Z0Z01011	Mister Krabs	The Big Show	No	Mister	Krabs	Owner	Acme C
W2S5T01003	Tiffany Lisowski	The Big Show	Yes	Tiffany	Lisowski	VP of Sales	Acme C
L2L1X01007	George Moreno	The Big Show	No	George	Moreno	VP	
Y4J3S01004	John Smith	The Big Show	Yes	John	Smith	CFO	Acme C
Q7M8R01010	Spongebob Squarepants	The Big Show	No	Spongebob	Squarepants	Fry Cook	Acme C
V0K1K01008	Patrick Star	The Big Show	No	Patrick	Star	Facilitator	Acme C
Z7J1Z01012	Squidward Tentacles	The Big Show	No	Squidward	Tentacles	Jazz Virtuoso	Acme C

1 - 11 of 11 (0 selected) All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Page 1

3. Click +NEW to create a new Ticket.

2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events Tickets

NEW DELETE EMAIL A LINK FLOW RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Active Tickets Search for records

Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	
S6W8Y01009	Sandy Cheeks	The Big Show	No	Sandy	Cheeks	Karate Instructor	2B Solut
R1D3R01001	Jeff Cross	The Big Show	Yes	Jeff	Cross	CEO	2B Solut
X5P4C01002	Susan Johnson	The Big Show	Yes	Susan	Johnson	CFO	Acme C

4. Enter Ticket information, including related Event and Contact information. Click SAVE.

2B-EVENTS 365
ATTENDEE & TICKET TRACKING

2B-Events > Tickets > New Ticket

SAVE SAVE & CLOSE NEW FLOW FORM EDITOR

TICKET : INFORMATION
New Ticket

Badge Number: Scanned: No

ATTENDEE	QR CODE	SCANS
Badge Number:		Scanned: No
Event:	QR Code Data:	Scan Count: 0
Contact:	ACTIVITIES	Owner: Tiffany Lisowski
First Name:	NOTES	LOCATION
Last Name:	There aren't any notes to show. To get started, enter a note.	Section:
Title:		Row:
Company:		Seat:
Email:		
Phone:		
Access Code:		

Created On: Modified On: Modified By:

Active

- Once the form is saved, a unique Badge Number and QR Code embedded with the Badge Number will be created. (The screen may need to be refreshed before it will display the QR Code.)

2B-EVENTS 365
ATTENDEE & TICKET TRACKING

2B-Events > Tickets > TOP4Y01013

NEW DEACTIVATE DELETE PROCESS ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG

TICKET : INFORMATION
TOP4Y01013

Badge Number: TOP4Y01013 Scanned: No

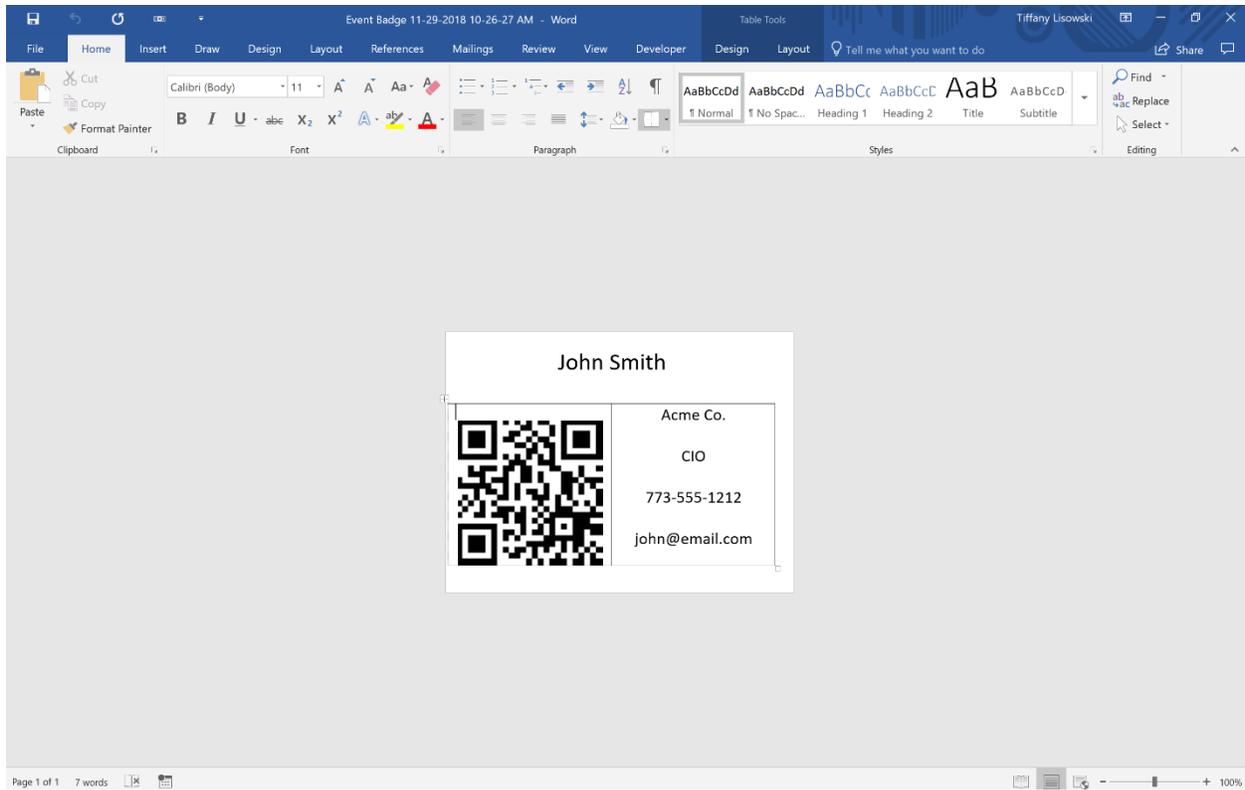
ATTENDEE	QR CODE	SCANS
Badge Number: TOP4Y01013		Scanned: No
Event: The Big Show	QR Code Data: iVBORw0KGgoAAAANSUhEUgA	Scan Count: 0
Contact: John Smith	ACTIVITIES	Owner: Tiffany Lisowski
First Name: John	NOTES	LOCATION
Last Name: Smith	Enter a note	Section:
Title: CIO		Row:
Company: Acme Co.		Seat:
Email: john@email.com		
Phone: 773-555-1212		
Access Code:		

Created On: 11/29/2018 10:21 AM Modified On: 11/29/2018 10:21 AM Modified By: Tiffany Lisowski

- A badge or ticket can then be created. Navigate to ... → Word Templates → Event Badge.

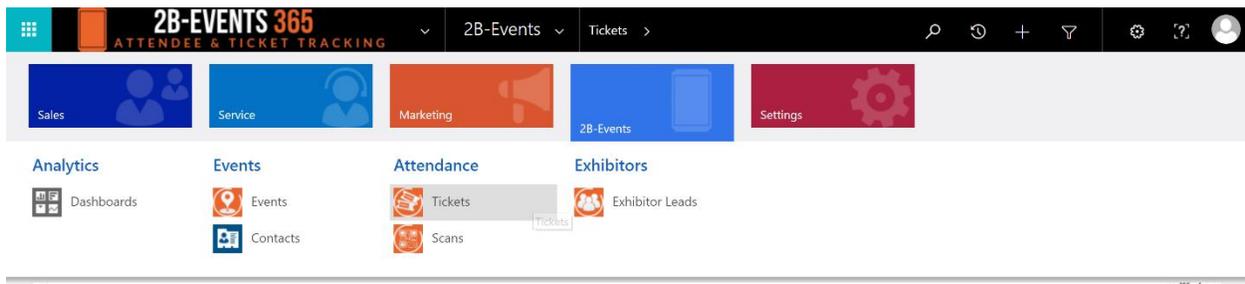
The screenshot displays the '2B-Events 365 ATTENDEE & TICKET TRACKING' interface. The main content area is titled 'TICKET : INFORMATION' and shows details for ticket 'TOP4Y01013'. The 'ATTENDEE' section lists: Badge Number (TOP4Y01013), Event (The Big Show), Contact (John Smith), First Name (John), Last Name (Smith), Title (CIO), Company (Acme Co.), Email (john@email.com), Phone (773-555-1212), and Access Code. The 'QR CODE' section shows a QR code and its data: iVBORw0KGgoAAAANSUHEUgA. Below this are 'ACTIVITIES' and 'NOTES' tabs, with a text input field for notes. The 'SCANS' section shows: Scanned (No), Scan Count (0), and Owner (Tiffany Lisowski). The 'LOCATION' section has fields for Section, Row, and Seat. At the bottom, it shows 'Created On' (11/29/2018 10:21 AM), 'Modified On' (11/29/2018 10:22 AM), and 'Modified By' (Tiffany Lisowski). A dropdown menu is open, showing options: Flow, Word Templates (with sub-options: Create Word Template, Create Word Template, Word Templates, Event Badge), Run Report, Other Activities, and Form Editor.

- A customizable Word template containing the QR Code will be generated in Word. This template can be modified based on your requirements. The ticket can then be printed or attached to an email.



VIEW OR UPDATE EXISTING TICKETS

1. Navigate to 2B-EVENTS → Tickets



2. Double-click Ticket record.

Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	
S6W8Y01009	Sandy Cheeks	The Big Show	No	Sandy	Cheeks	Karate Instructor	2B Solut
R1D3R01001	Jeff Cross	The Big Show	Yes	Jeff	Cross	CEO	2B Solut
X5P4C01002	Susan Johnson	The Big Show	Yes	Susan	Johnson	CFO	Acme C
S9S5W01005	Tim Jones	The Big Show	Yes	Tim	Jones	CMO	Acme C
C6Z0Z01011	Mister Krabs	The Big Show	No	Mister	Krabs	Owner	Acme C
<input type="checkbox"/> W2S5T01003	Tiffany Lisowski	The Big Show	Yes	Tiffany	Lisowski	VP of Sales	Acme C
L2L1X01007	George Moreno	The Big Show	No	George	Moreno	VP	
Y4J3S01004	John Smith	The Big Show	Yes	John	Smith	CFO	Acme C
TOP4Y01013	John Smith	The Big Show	No	John	Smith	CIO	Acme C
Q7M8R01010	Spongebob Squarepants	The Big Show	No	Spongebob	Squarepants	Fry Cook	Acme C
VOK1K01008	Patrick Star	The Big Show	No	Patrick	Star	Facilitator	Acme C
Z7J1Z01012	Squidward Tentacles	The Big Show	No	Squidward	Tentacles	Jazz Virtuoso	Acme C

3. Changes can be made from the Ticket record.

2B-EVENTS 365 ATTENDEE & TICKET TRACKING
2B-Events > Tickets > W2S5T01003

TICKET : INFORMATION
W2S5T01003

Badge Number: W2S5T01003

Event: The Big Show

Contact: Tiffany Lisowski

First Name: Tiffany

Last Name: Lisowski

Title: Sales Manager

Company: Acme Co.

Email: tiffany@2bsolutions.com

Phone: 205-408-9991

Access Code:

QR CODE



QR Code Data: iVBORw0KGgoAAAANSUHEUgA

SCANS

Scanned: Yes

Scan Count: 1

Owner: Jeff Cross

ACTIVITIES

Enter a note

- Event Badge.docx
Jeff Cross - Yesterday 5:06 AM
- QR Code
QR Code
qrcode.png
Jeff Cross - 11/27/2018 4:05 AM

NOTES

Section:

Row:

Seat:

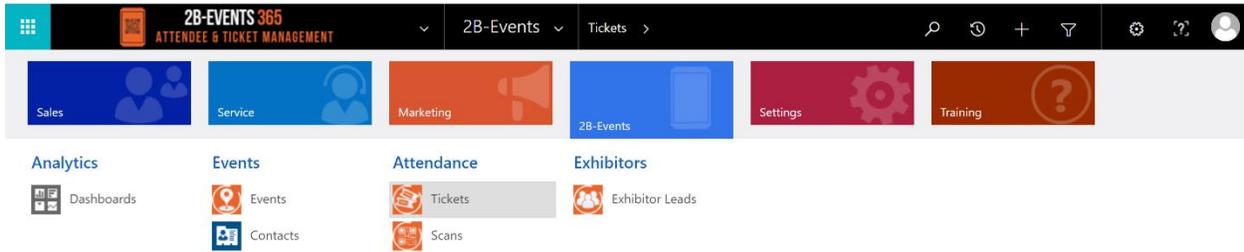
Created On: 10/17/2018 5:29 PM Modified On: 11/29/2018 10:51 AM Modified By: Tiffany Lisowski

Active

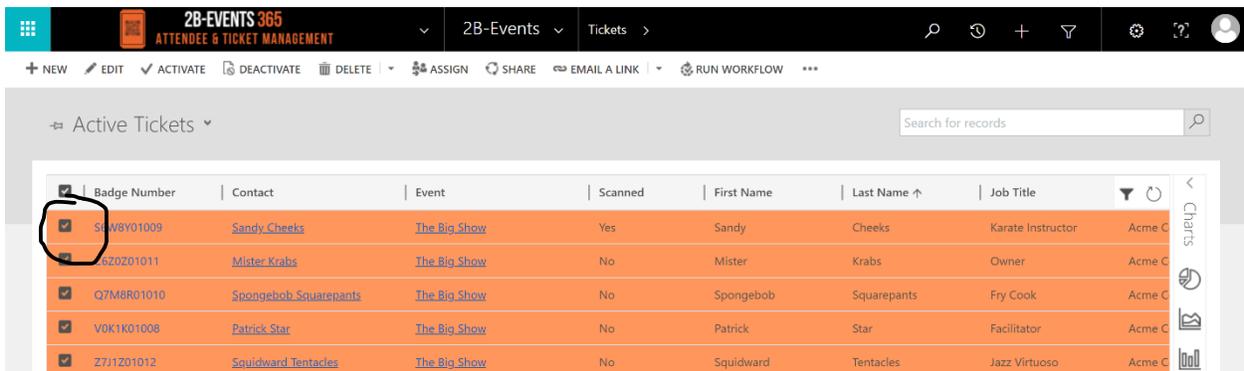
BULK PRINT ACTIVE TICKETS

To print all Active Tickets (or several select Tickets) at once:

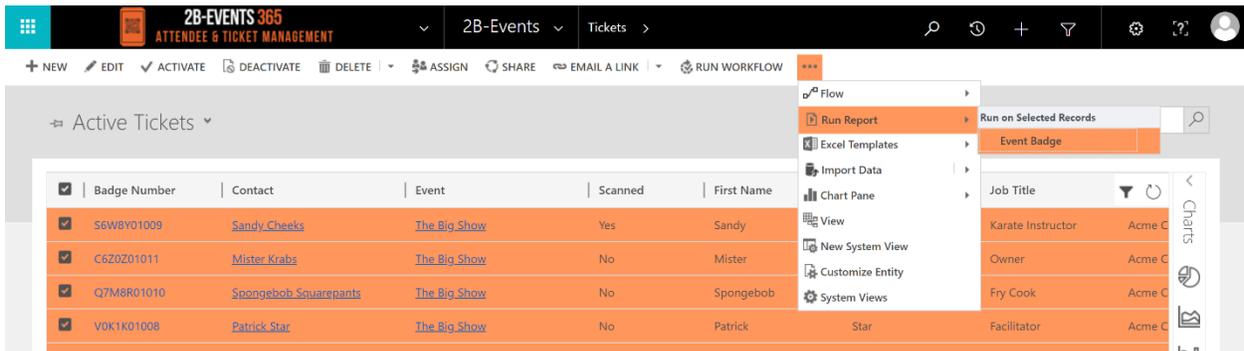
1. Navigate to 2B-Events → Attendance → Tickets



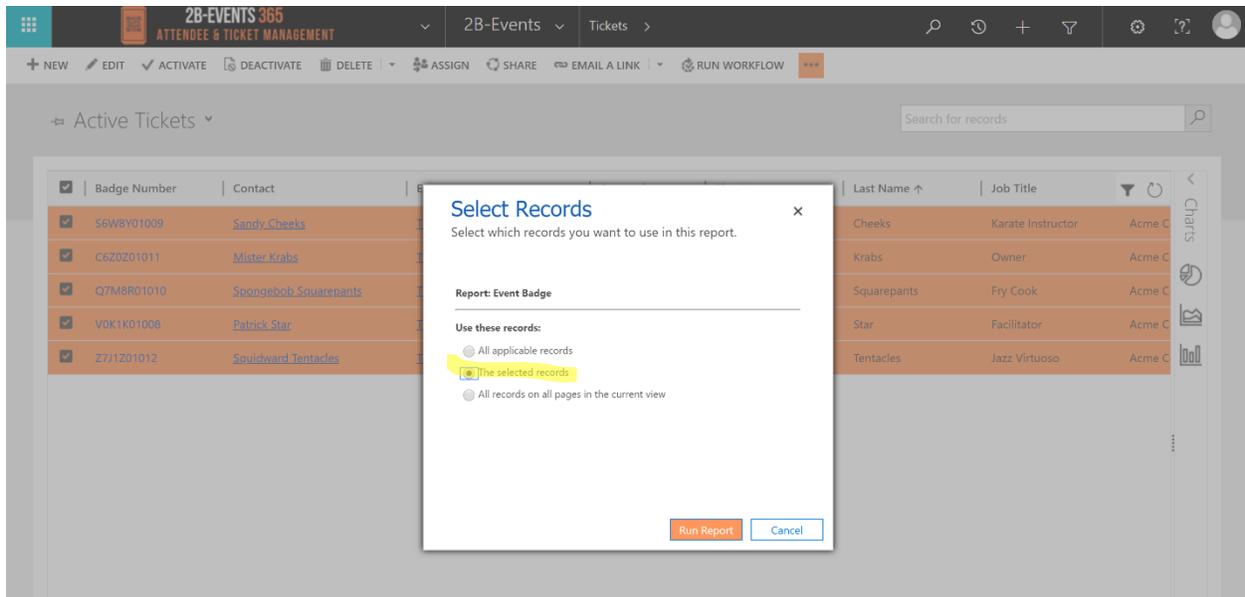
2. The default view shows all Active Tickets. Select the tickets to be printed by checking the box to the left of the record.



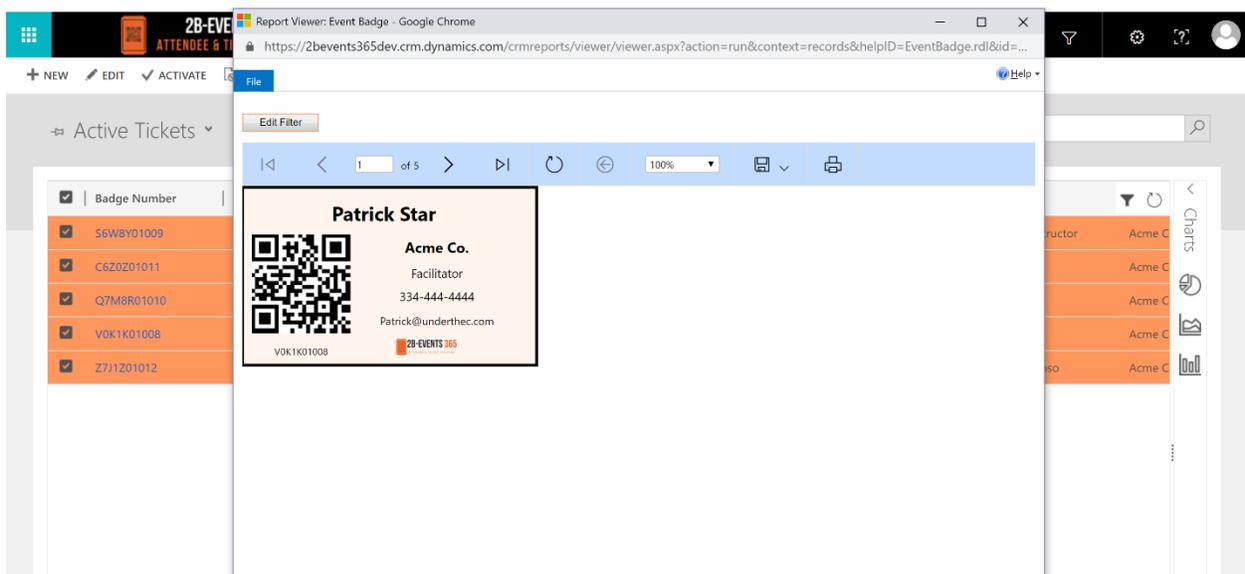
3. After selecting the tickets to be printed, navigate to ... → Run Report → Event Badge.



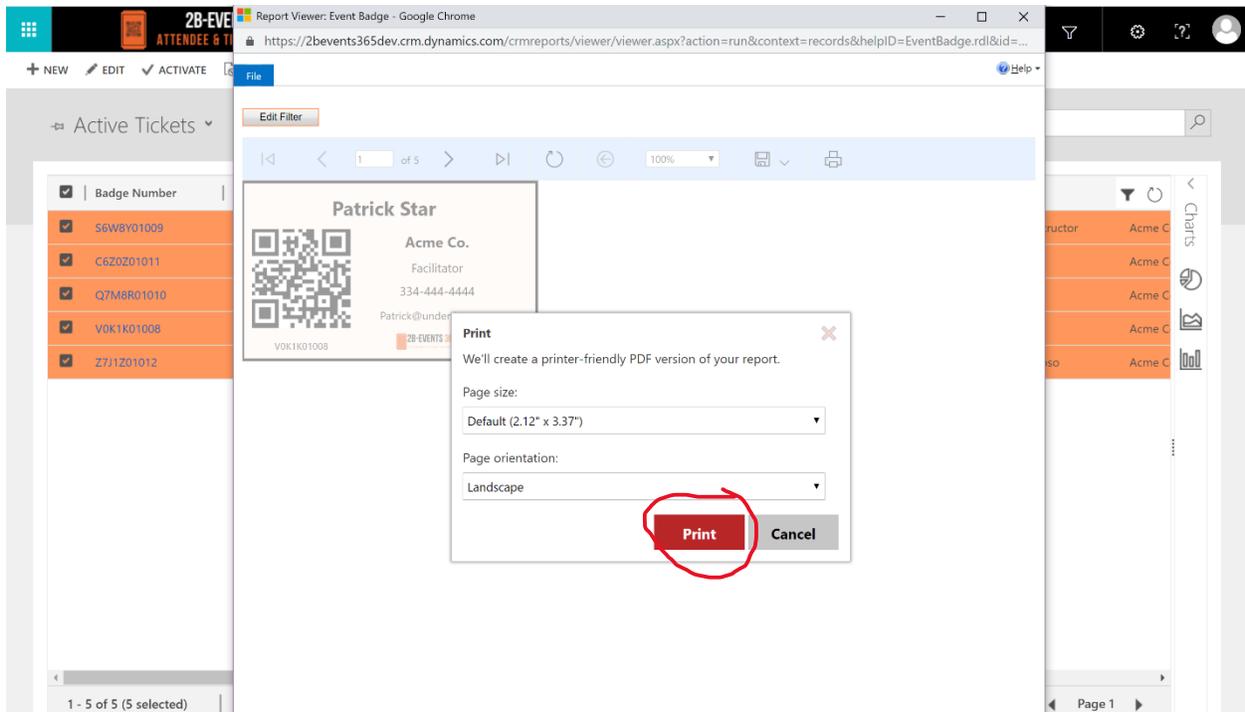
4. When the Select Records box appears, choose “The selected records” to print those records selected in the previous step.



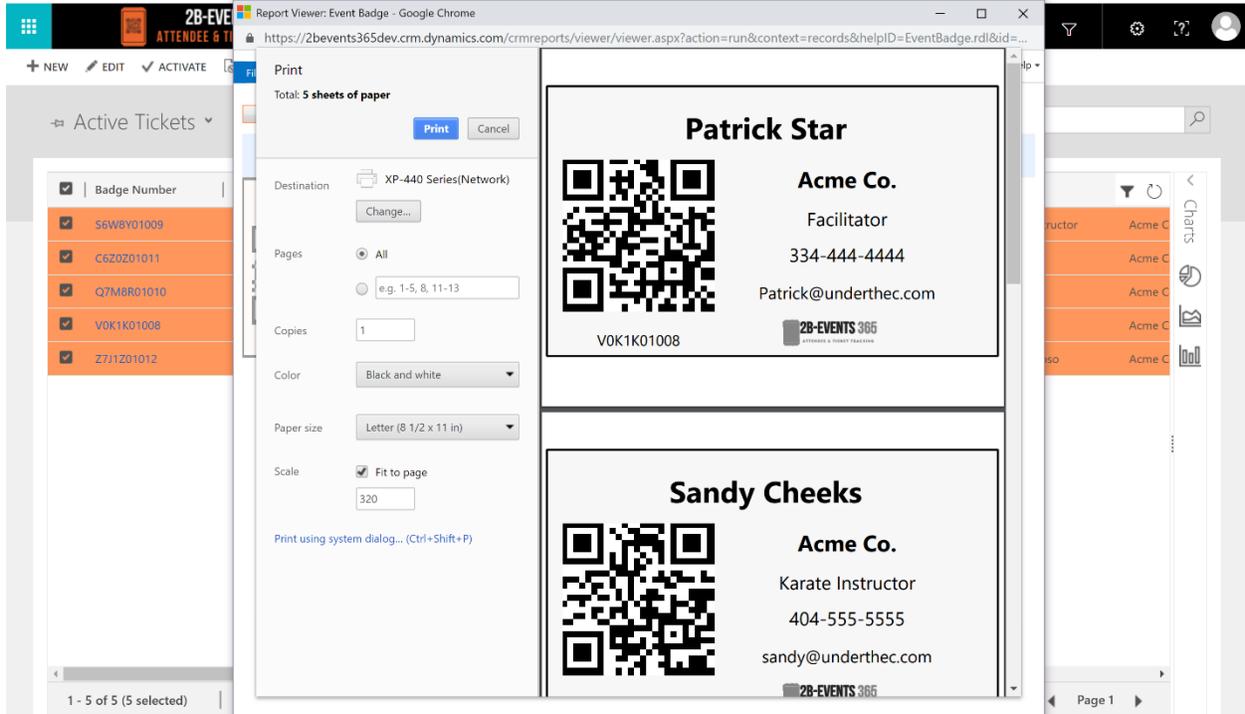
5. A ticket will be created for each of the selected records.



6. Click PRINT. (The default size for tickets is set at 2.12" x 3.37". To create a custom badge/ticket for batch printing, please contact us.)



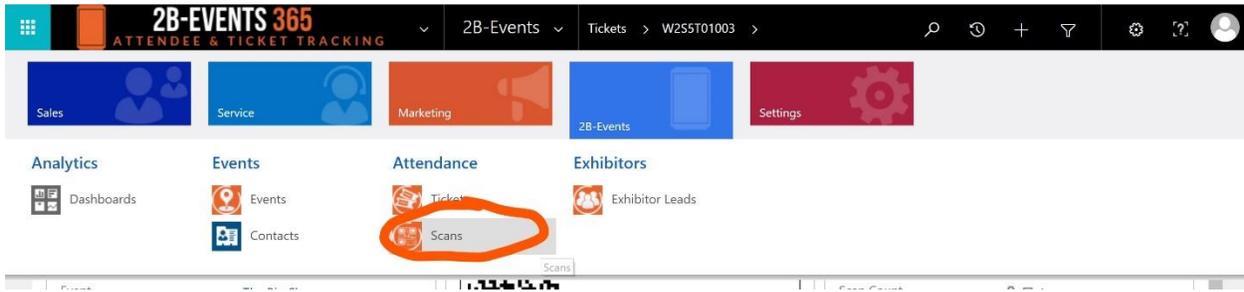
7. A PDF will be created containing tickets/badges for all selected records. Simply print the PDF.



SCANS

VIEW TICKET SCAN INFORMATION

1. Navigate to 2B-EVENTS → Tickets → Scans



2. The default view shows all Active Scans. For more information on Views, see [Create and Edit Views](#).

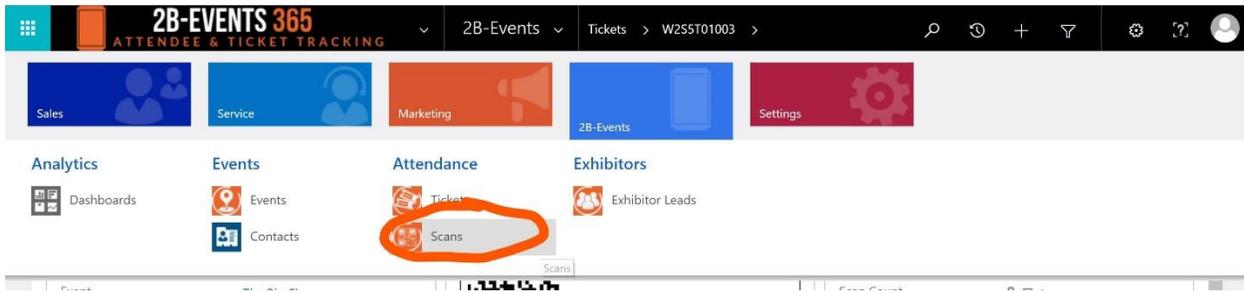
The screenshot shows the 2B-EVENTS 365 ATTENDEE & TICKET TRACKING 'Active Scans' view. The table displays a list of scans with columns for Badge ID, Scan Time, Event, Ticket, Created On, and Owner. The table is filtered to show 13 active scans.

Badge ID	Scan Time	Event	Ticket	Created On	Owner
R1D3R01001	11/28/2018 2:57 AM	The Big Show	R1D3R01001	11/28/2018 2:57 AM	Jeff Cross
XSP4C01002	11/27/2018 4:34 AM	The Big Show	XSP4C01002	11/27/2018 4:34 AM	Jeff Cross
W255T01003	11/27/2018 4:07 AM	The Big Show	W255T01003	11/27/2018 4:07 AM	Jeff Cross
Y4J3S01004	11/26/2018 5:17 PM	Breakout Session 1	Y4J3S01004	11/26/2018 5:17 PM	Jeff Cross
L2X7D01006	11/26/2018 4:39 PM	The Big Show	L2X7D01006	11/26/2018 4:39 PM	Jeff Cross
L2X7D01006	11/26/2018 4:37 PM	The Big Show	L2X7D01006	11/26/2018 4:37 PM	Jeff Cross
S955W01005	11/26/2018 4:19 PM	Breakout Session 1	S955W01005	11/26/2018 4:19 PM	Jeff Cross
S955W01005	11/26/2018 4:19 PM	Breakout Session 1	S955W01005	11/26/2018 4:19 PM	Jeff Cross
S955W01005	11/26/2018 4:19 PM	The Big Show	S955W01005	11/26/2018 4:19 PM	Jeff Cross
XSP4C01002	11/26/2018 3:43 PM	Breakout Session 2	XSP4C01002	11/26/2018 3:43 PM	Jeff Cross
XSP4C01002	11/26/2018 3:43 PM	Breakout Session 2	XSP4C01002	11/26/2018 3:43 PM	Jeff Cross
XSP4C01002	11/26/2018 3:43 PM	Breakout Session 2	XSP4C01002	11/26/2018 3:43 PM	Jeff Cross
R1D3R01001	11/26/2018 3:42 PM	Breakout Session 2	R1D3R01001	11/26/2018 3:42 PM	Jeff Cross

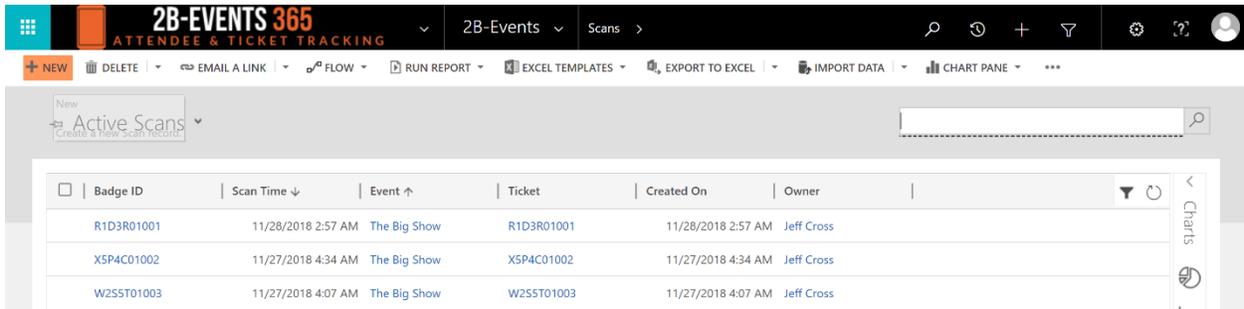
ENTER SCANS MANUALLY

While ticket scanning will most likely occur using the mobile application, scans can be entered manually.

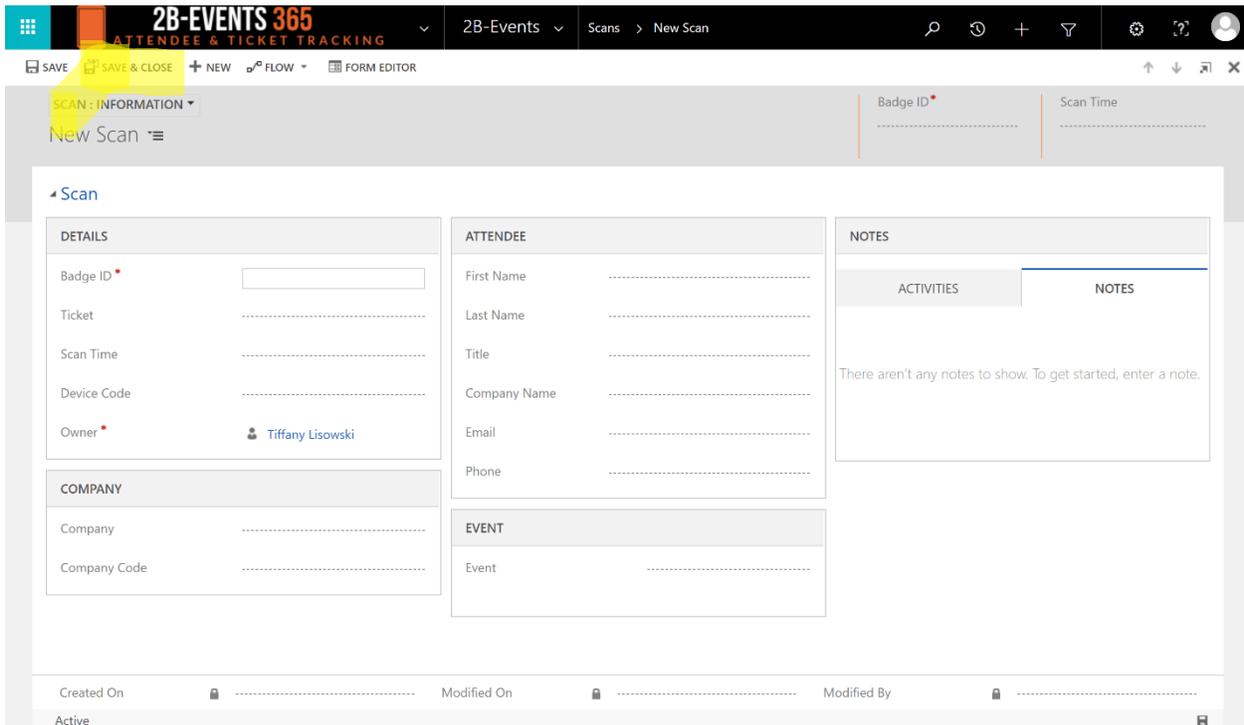
1. Navigate to 2B-EVENTS → Tickets → Scans



2. Click +NEW to create a new Scan record.



3. Enter Scan information and SAVE & CLOSE

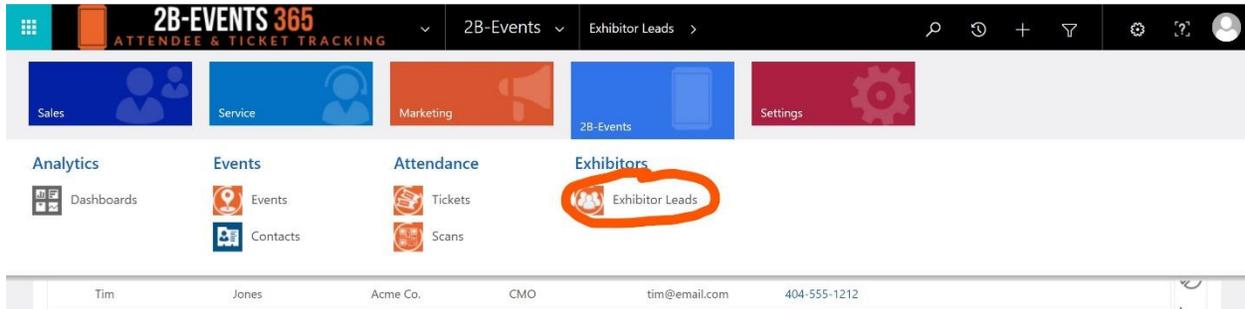


EXHIBITOR LEADS

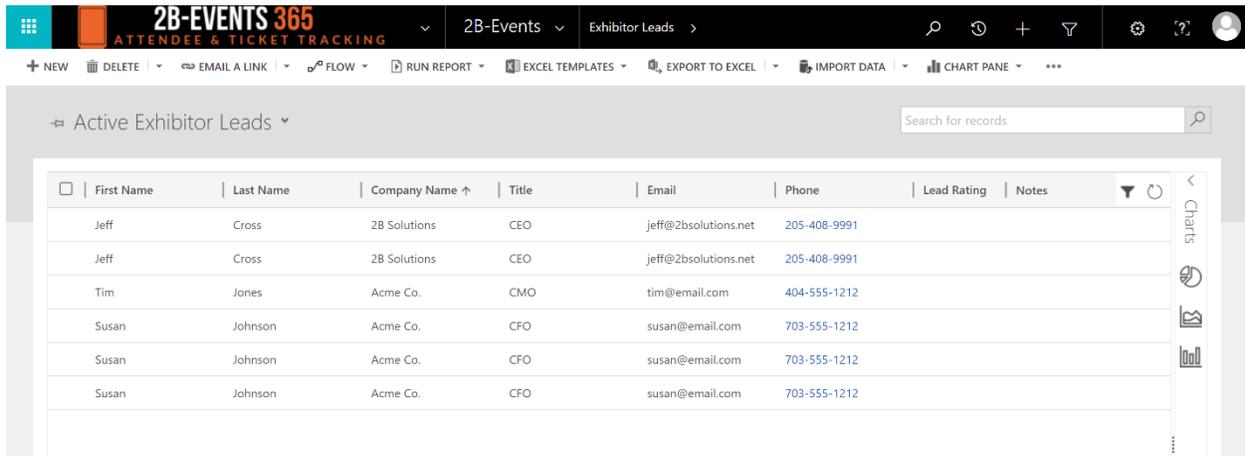
Exhibitors can capture lead information at events such as trade shows using the 2B-EVENTS mobile application for Exhibitors. See Navigating the Mobile Application for Exhibitors for instruction on its use.

VIEW EXHIBITOR LEADS

1. Exhibitor Lead information is captured within 2B-EVENTS 365 and can be viewed by navigating to 2B-EVENTS 365 → Exhibitors → Exhibitor Leads



2. The default view is Active Leads. This view shows all active Exhibitor Leads. For more information on Views, see [Create and Edit Views](#).



3. The Exhibitor Leads can be exported to Excel by utilizing the Export to Excel function. See [Export Data to Excel](#) for more information.

2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events Exhibitor Leads

NEW DELETE EMAIL A LINK FLOW RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Active Exhibitor Leads Search for records

First Name	Last Name	Company Name ↑	Title	Email	Phone	Lead Rating	Notes
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		
Tim	Jones	Acme Co.	CMO	tim@email.com	404-555-1212		
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		

4. An Excel spreadsheet will be created.

Active Exhibitor Leads 11-29-2018 11:27-54 AM [Protected View] - Excel

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

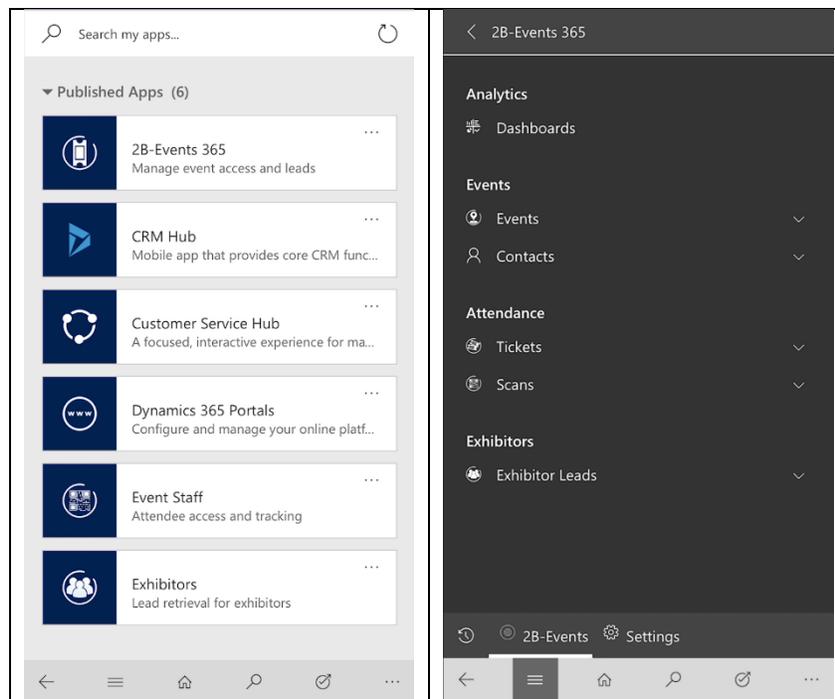
(Do Not Modify) Exhibitor Lead

First Name	Last Name	Company Name	Title	Email	Phone	Lead Rating	Notes
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		
Tim	Jones	Acme Co.	CMO	tim@email.com	404-555-1212		
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		

NAVIGATING THE 2B-EVENTS 365 MOBILE APPLICATION FOR ADMINISTRATORS

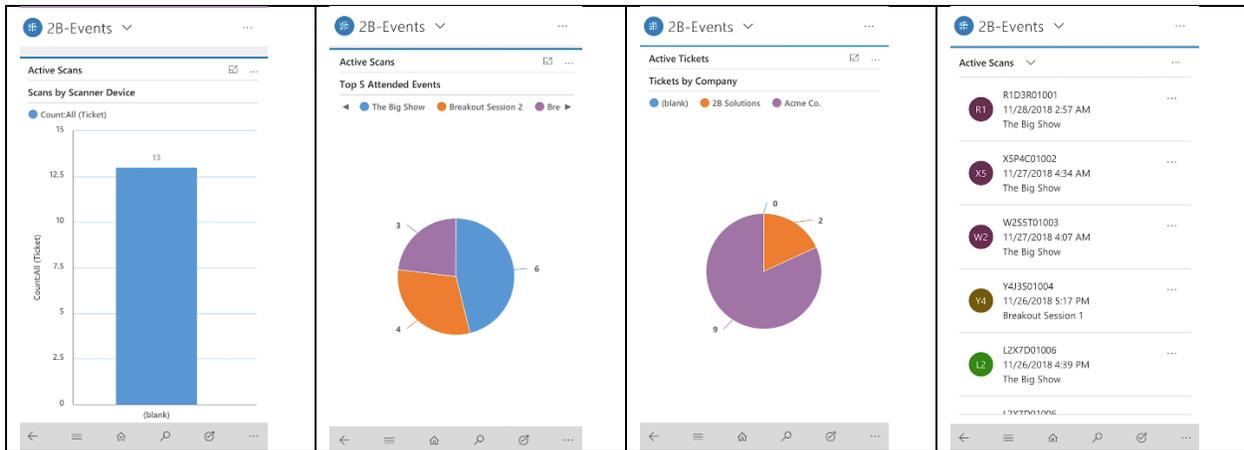
The mobile application for 2B-EVENTS 365 Administrators shows most of the same information available in the core application. This information includes Dashboards, Events, Tickets, Scans and Exhibitor info.

After logging into your Dynamics 365 Mobile Application, choose 2B-Events 365. The home screen shows the 2B-Events 365 Menu.



DASHBOARDS

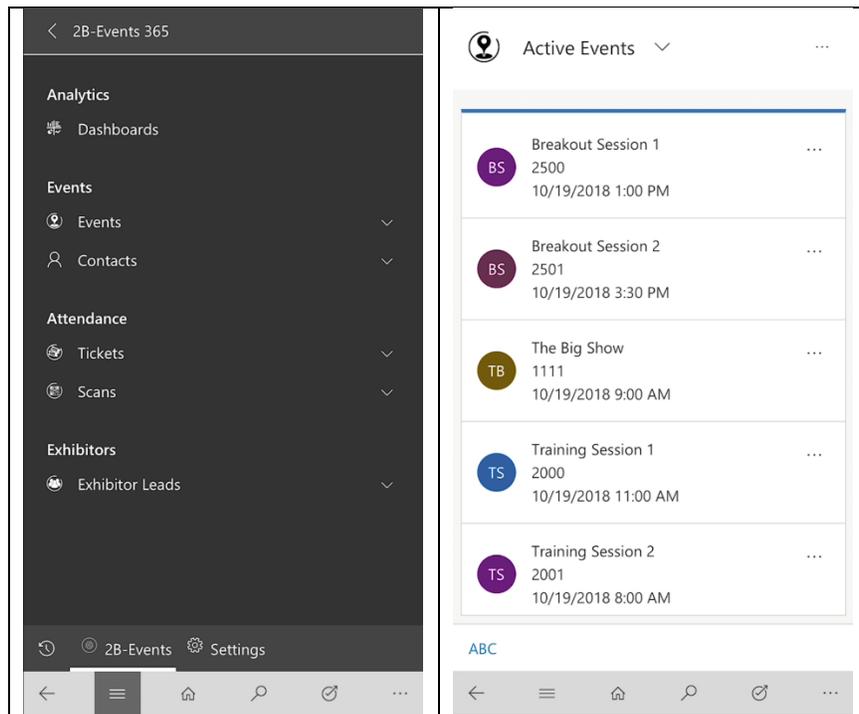
1. Under Dashboards, the user can see analytics relating to Scans by Device, Active Scans, Tickets by Company and Active Scans by scrolling down the page.



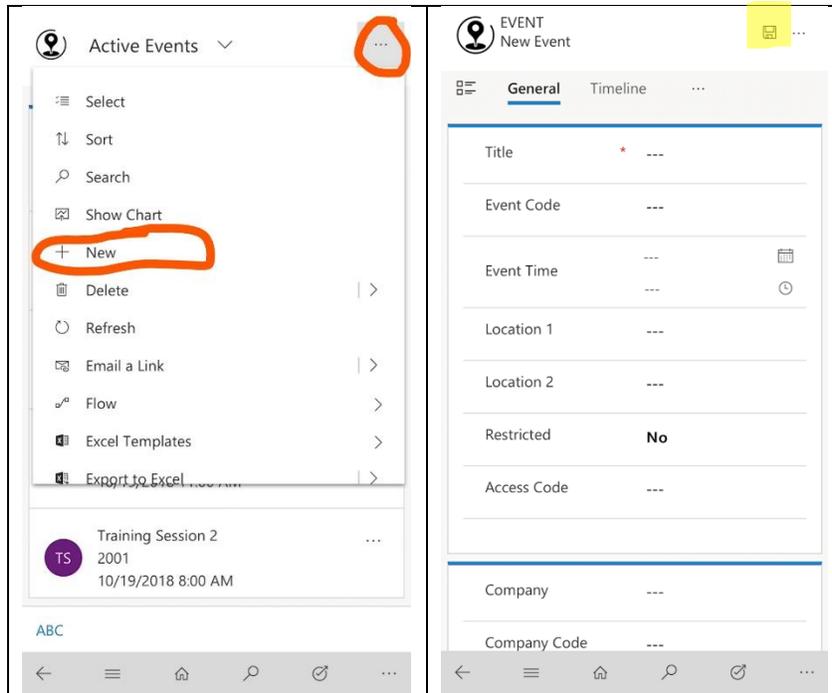
2. While these are the out-of-the-box Dashboards, new dashboards can be created. See [Create and Edit Dashboards](#) and/or [Dashboard Views in Dynamics 365 for Phone and Tablets](#) for more information.

EVENTS

1. From the home screen, choose Events to see a list of Active Events.

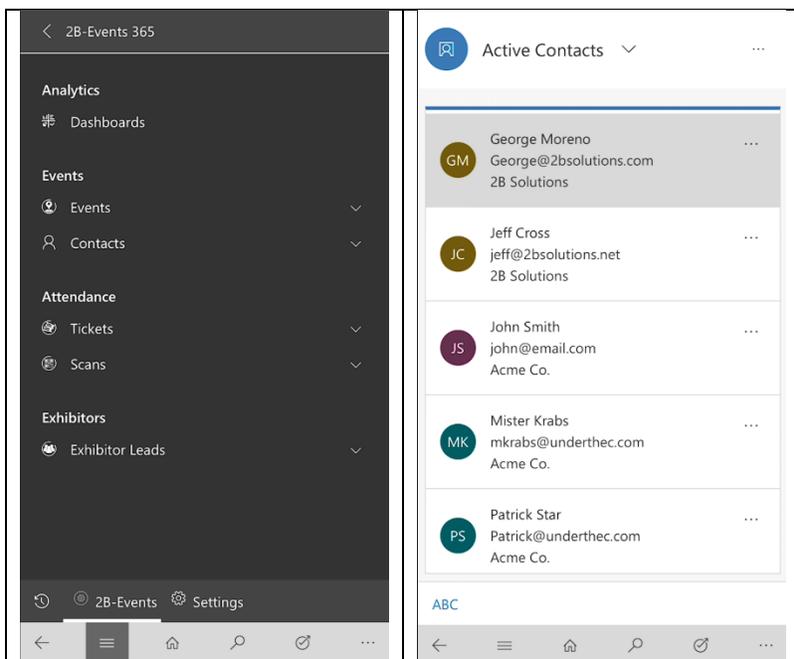


2. A new Event can be added by pressing ... and choosing +NEW. A blank Event form will appear. Enter information for Event and Save.

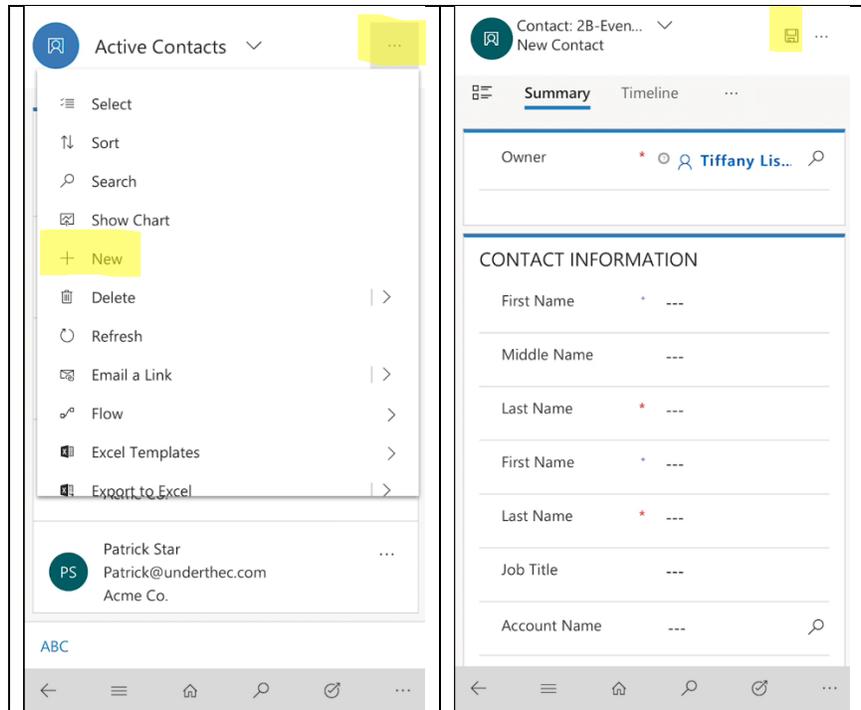


CONTACTS

1. From the home screen, select Contacts to view a list of Contacts.

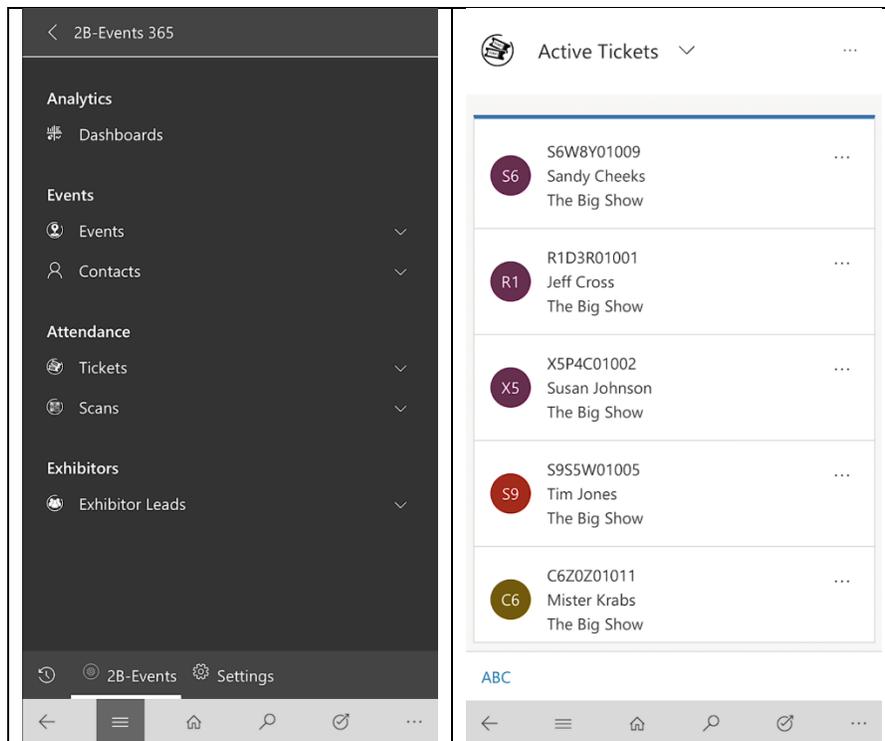


3. To add a new Contact, press ... and choose +NEW. A blank Event form will appear. Enter information for Event and Save.

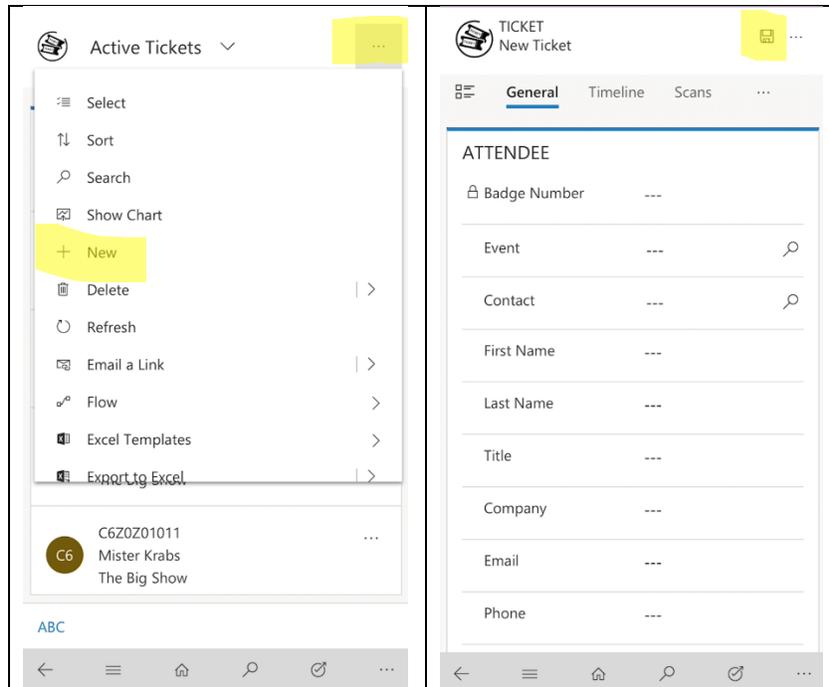


TICKETS

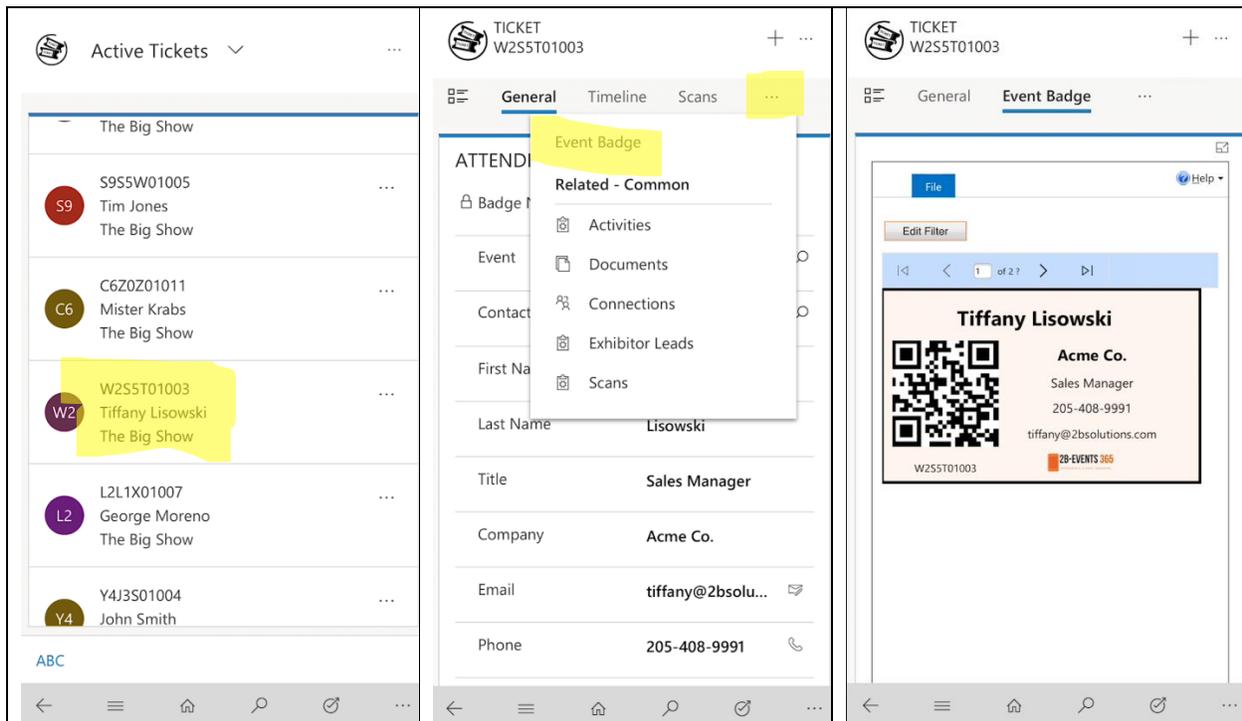
1. From the home screen, select Tickets to see a list of Active Tickets.



2. To add a new Ticket, press ... and then +NEW. A blank Ticket form will appear. Enter information and Save.



3. Badges/Tickets can be viewed by choosing a Ticket record, pressing ... and then Event Badge.

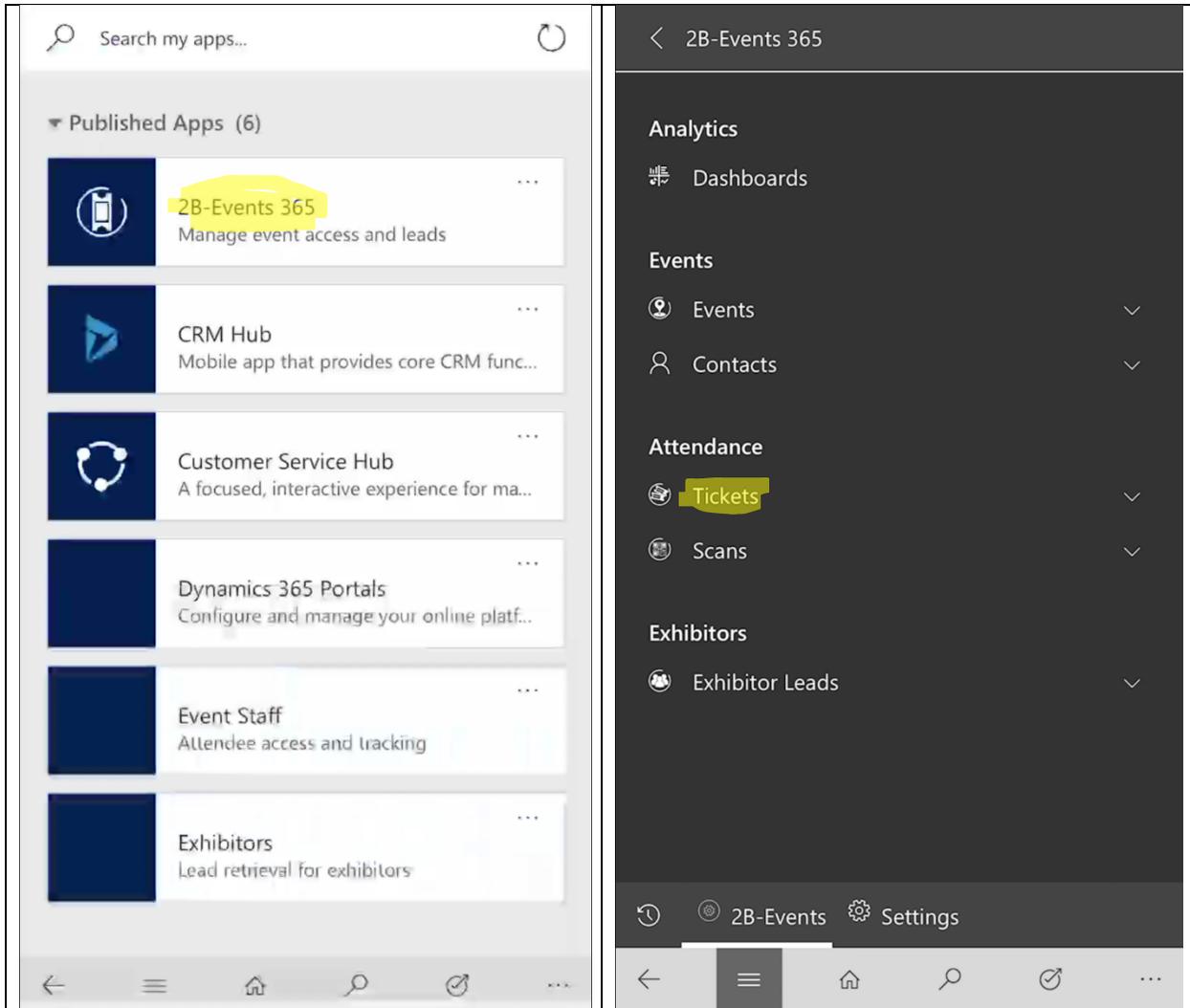


4. If on-site badge or ticket printing is required, please see Mobile Badge Printing.

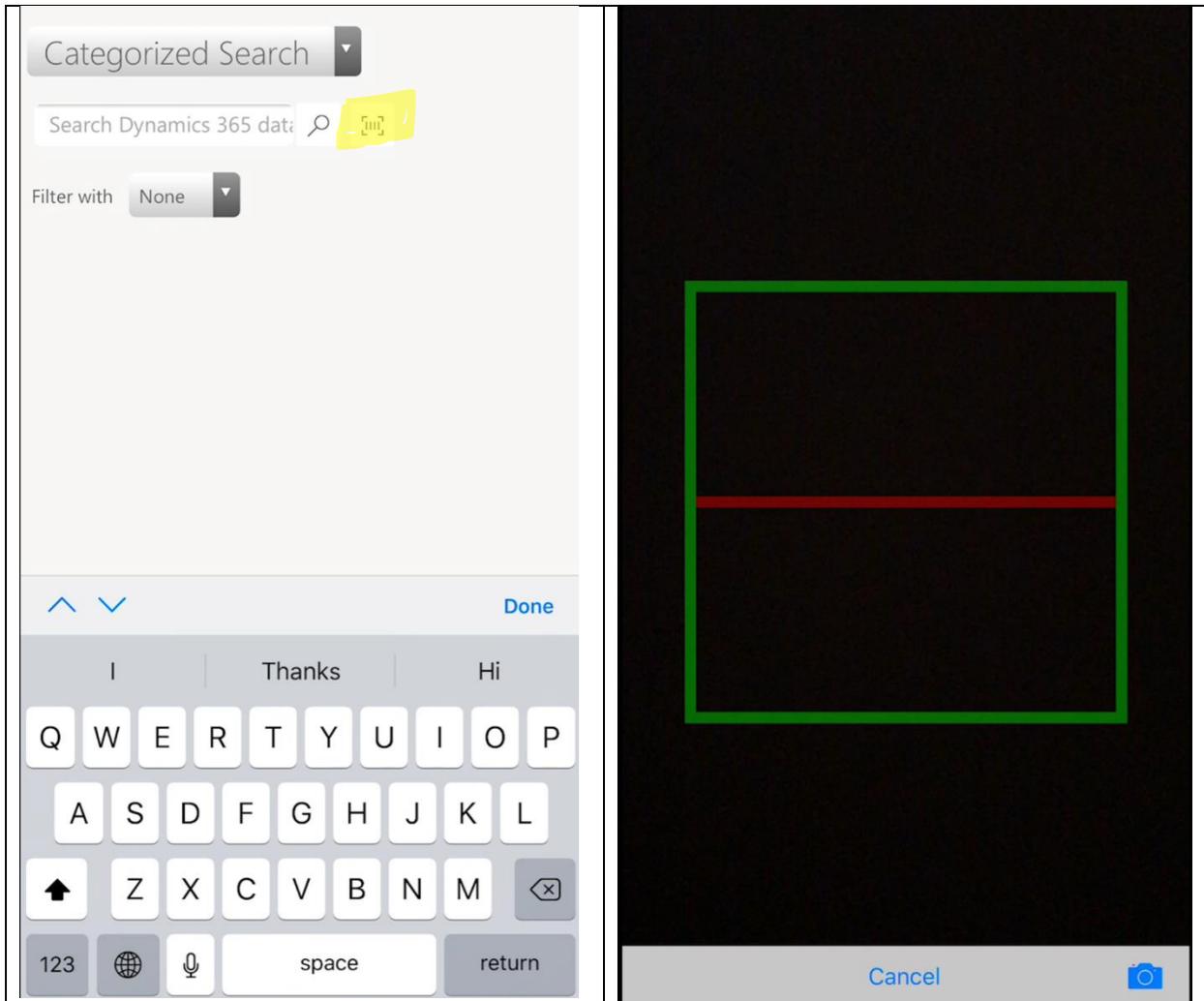
MOBILE TICKET/BADGE PRINTING

If you have a Bluetooth enabled badge printing device, tickets/badges can be printed on-site.

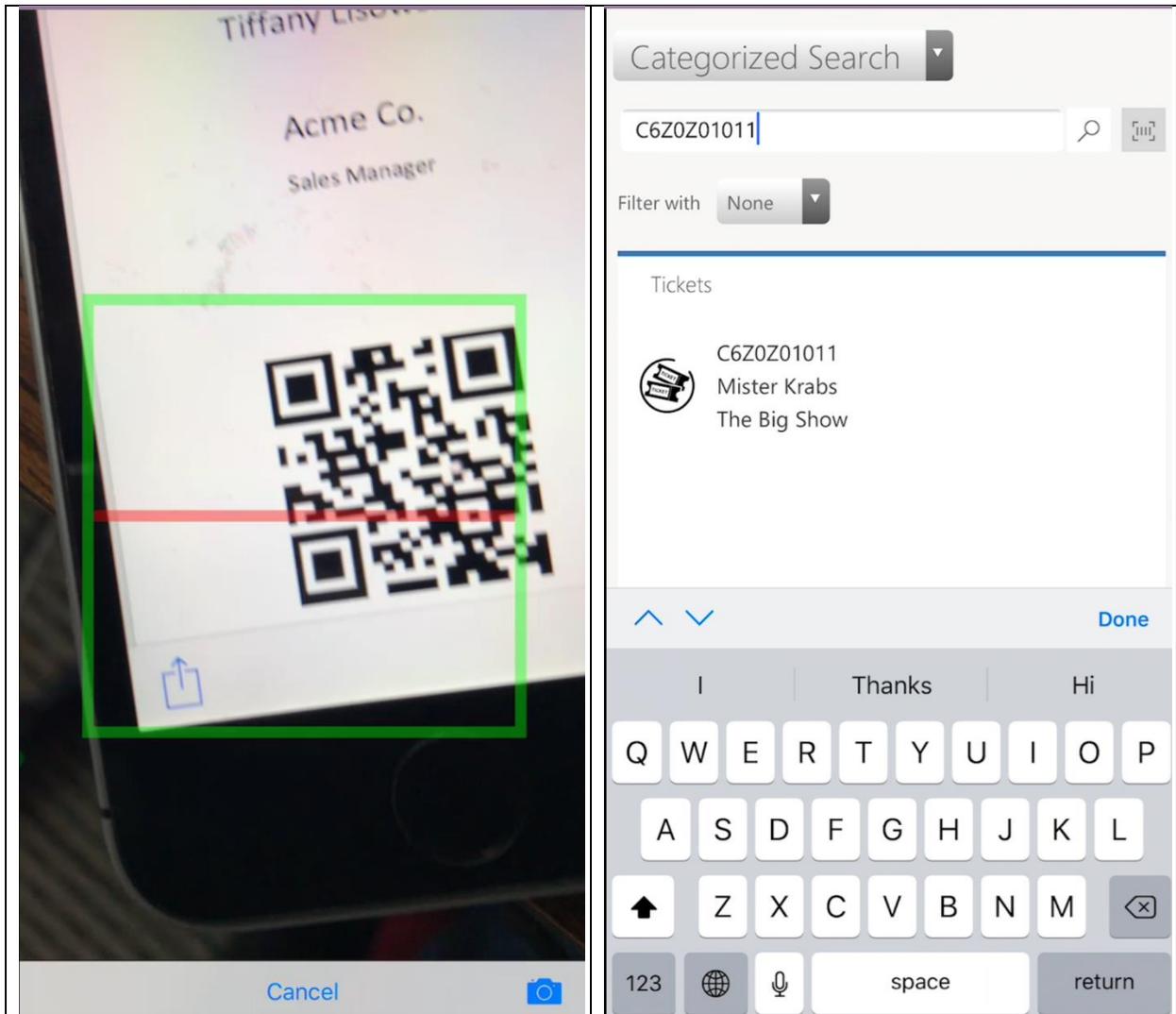
1. Log into your Dynamics 365 Mobile App. Navigate to 2B-Events 365 then Tickets.



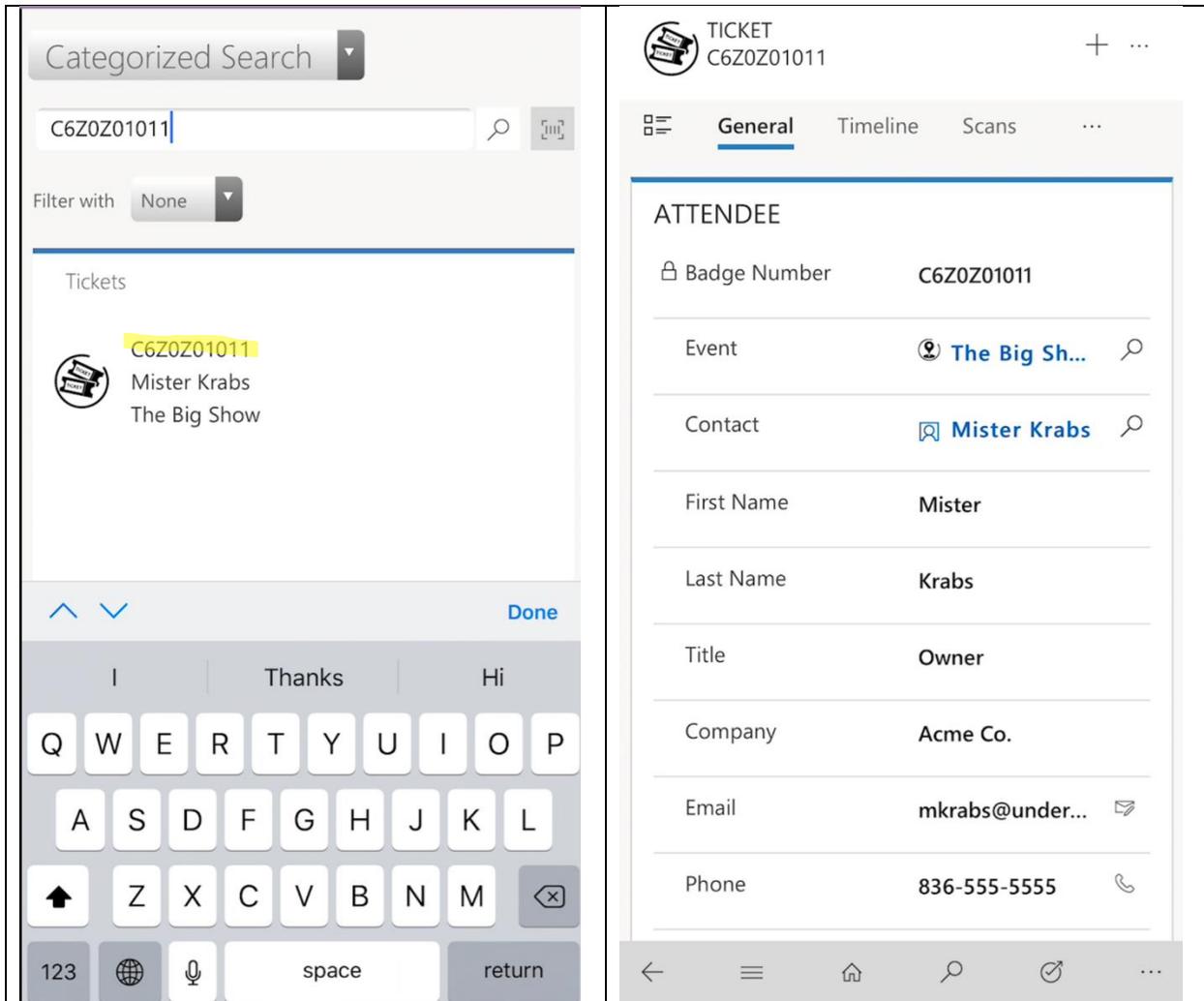
2. The following screen will appear. Click on the scanner button to open camera for ticket scanning.



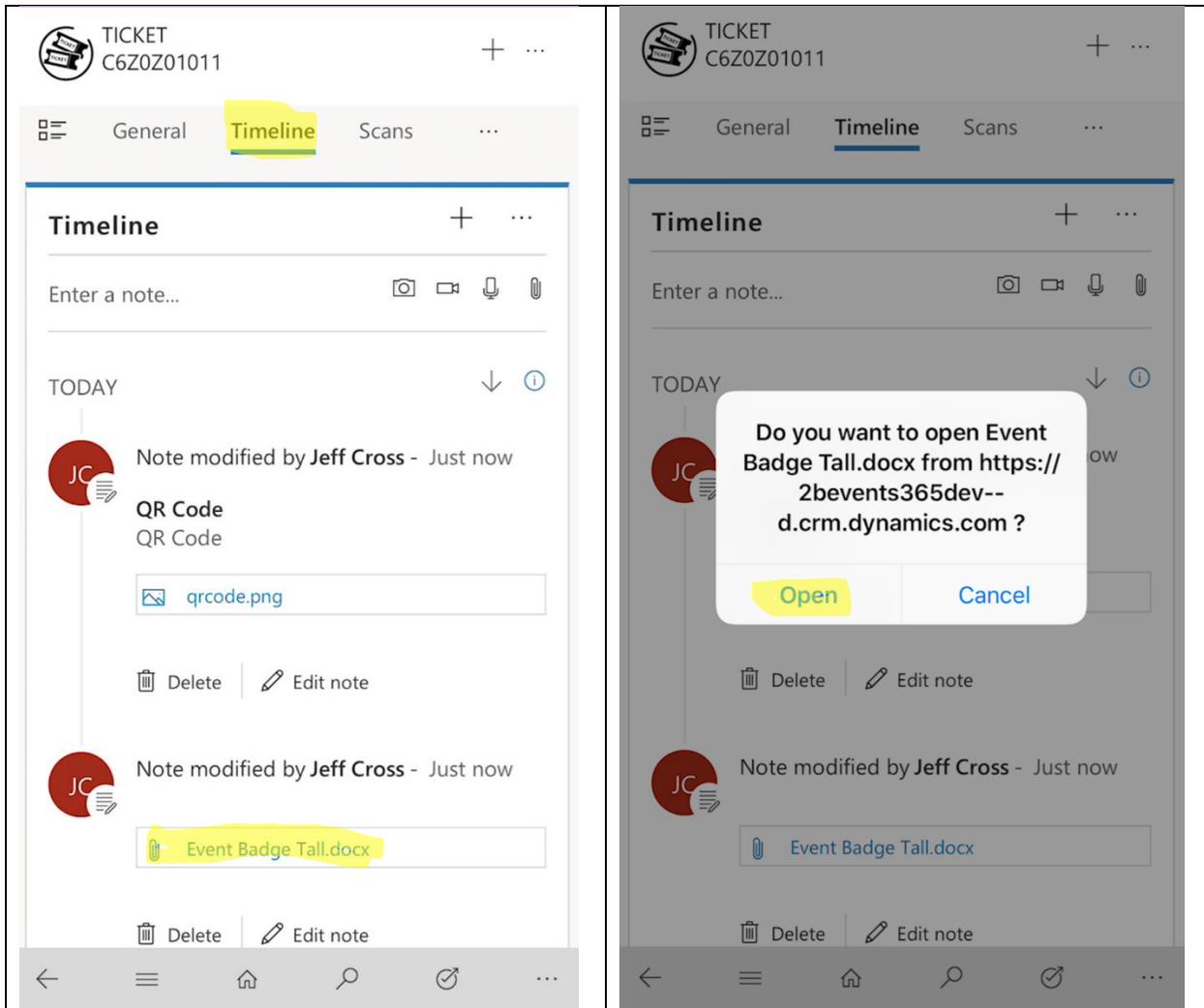
3. Scan the QR Code on the ticket to bring up the ticket record.



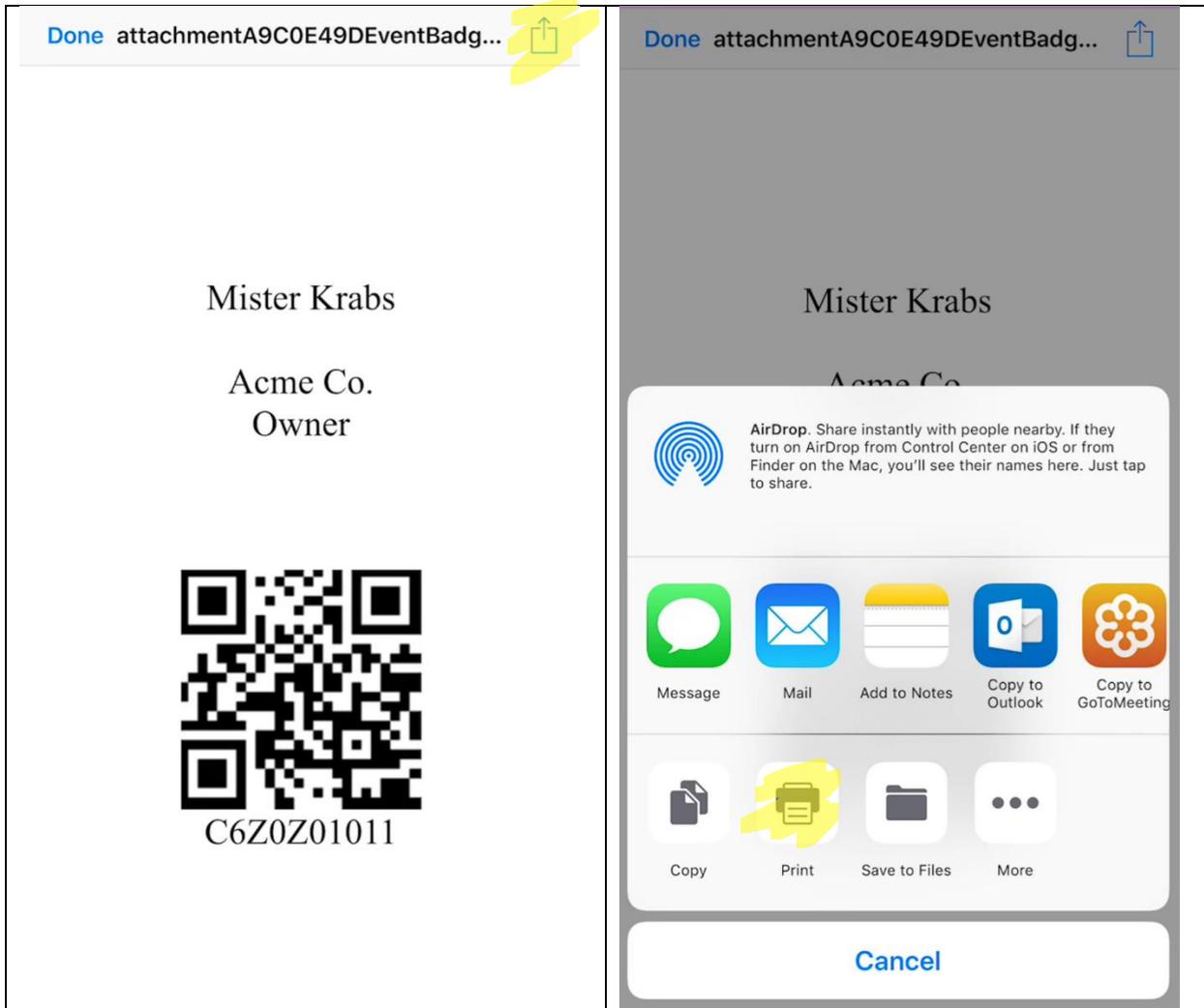
4. Click on the ticket record to open.



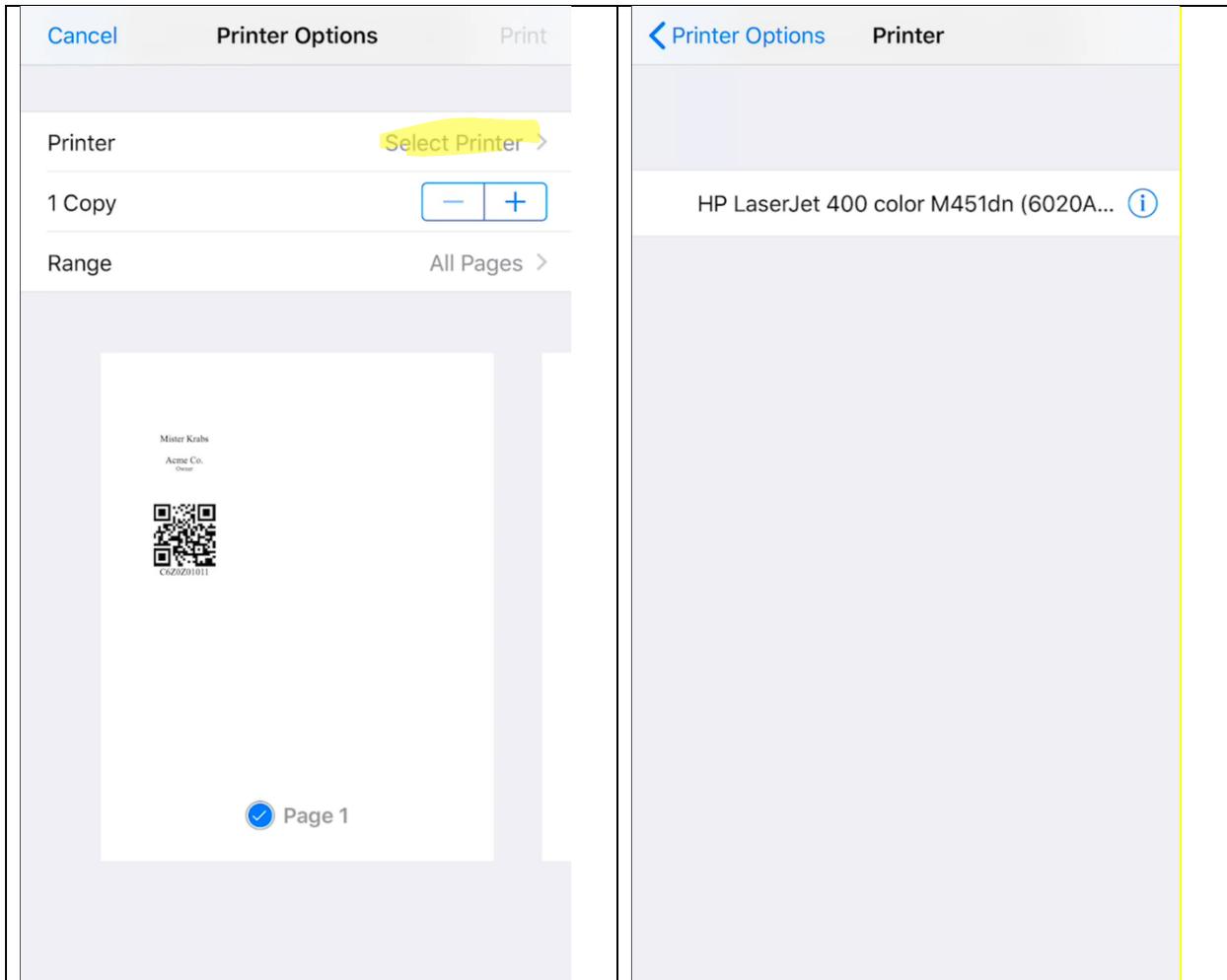
5. On the ticket record, choose Timeline. Then click on the Event Badge template to open. Choose Okay.



6. The Badge/ticket template will open. Click on the icon. Then choose Print. (**NOTE: This example is shown using an iOS device. The procedure may vary slightly on an Android device.**)

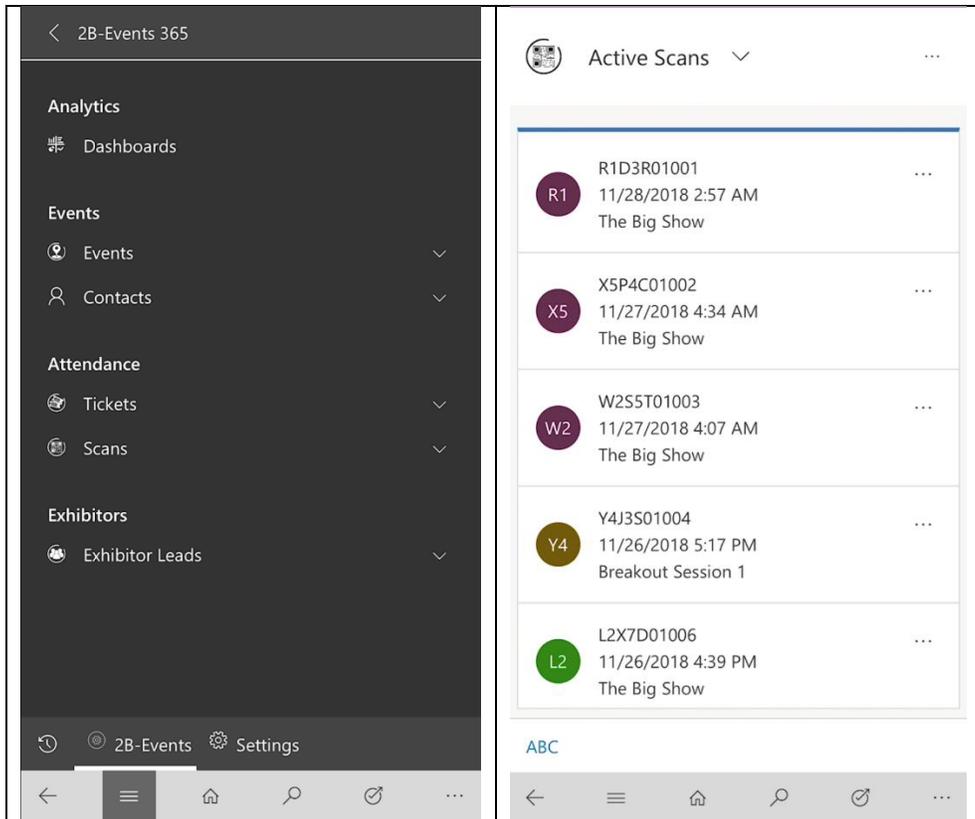


7. Select the appropriate printer and then PRINT.

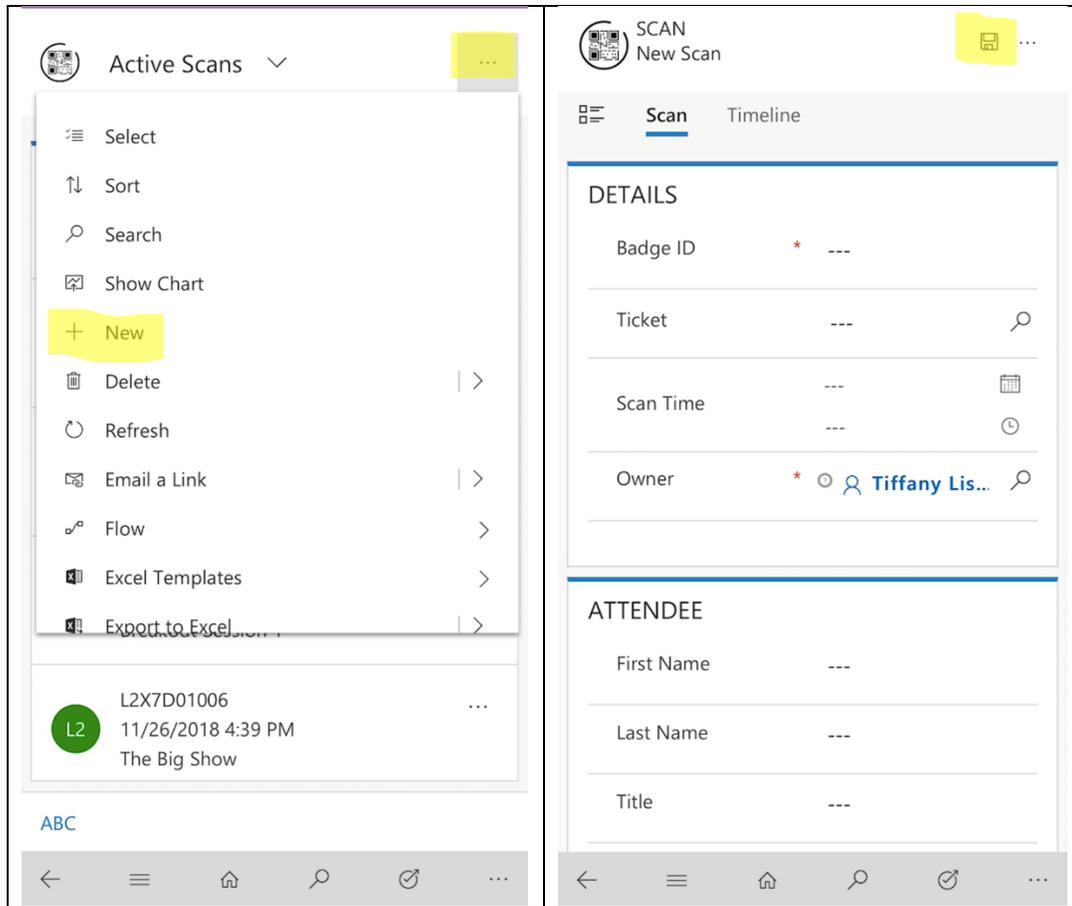


SCANS

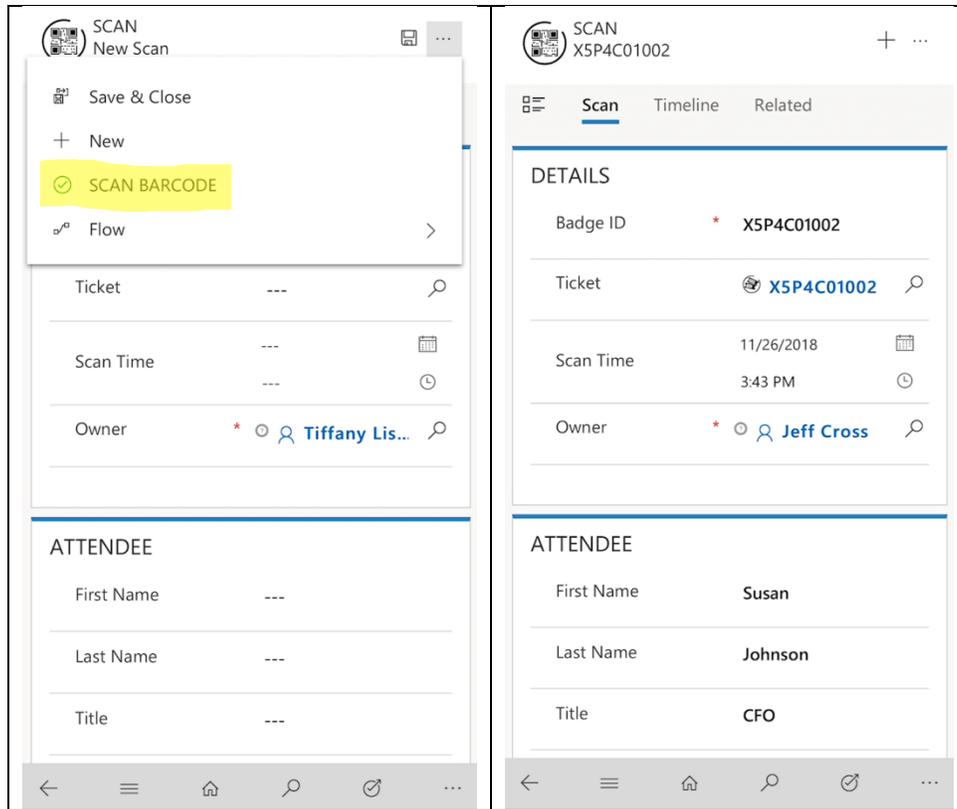
1. To see a list of Active Scans, select Scans from home page.



2. A Ticket scan can be entered manually if necessary. Press ... then +NEW. Enter information and Save.

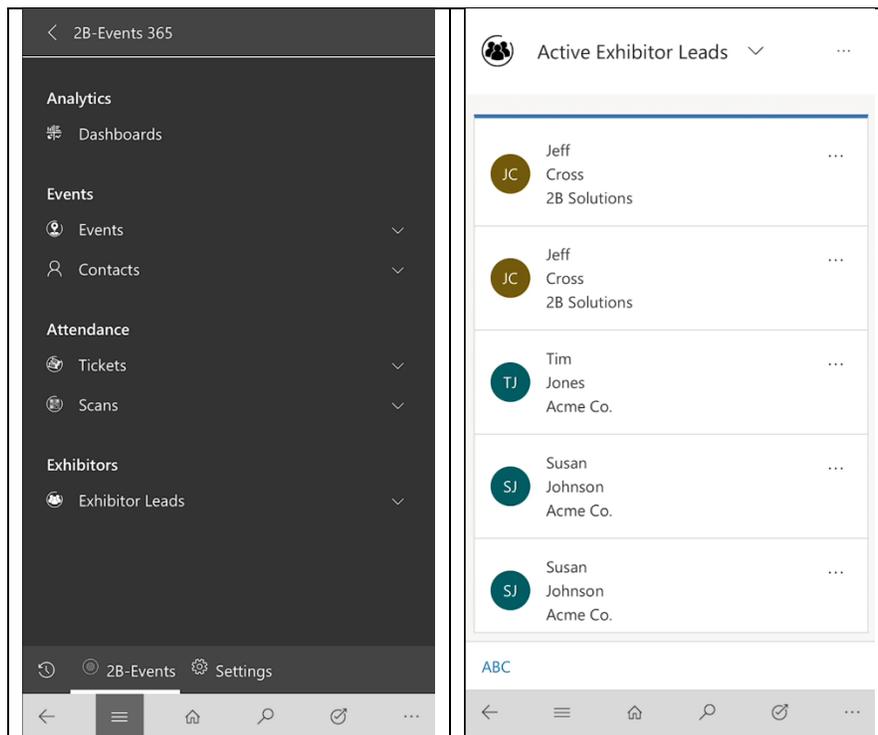


3. To scan an existing ticket/badge, press ... then Scan Barcode. The device camera will open and the QR Code can be scanned. The Scan record will auto-populate.

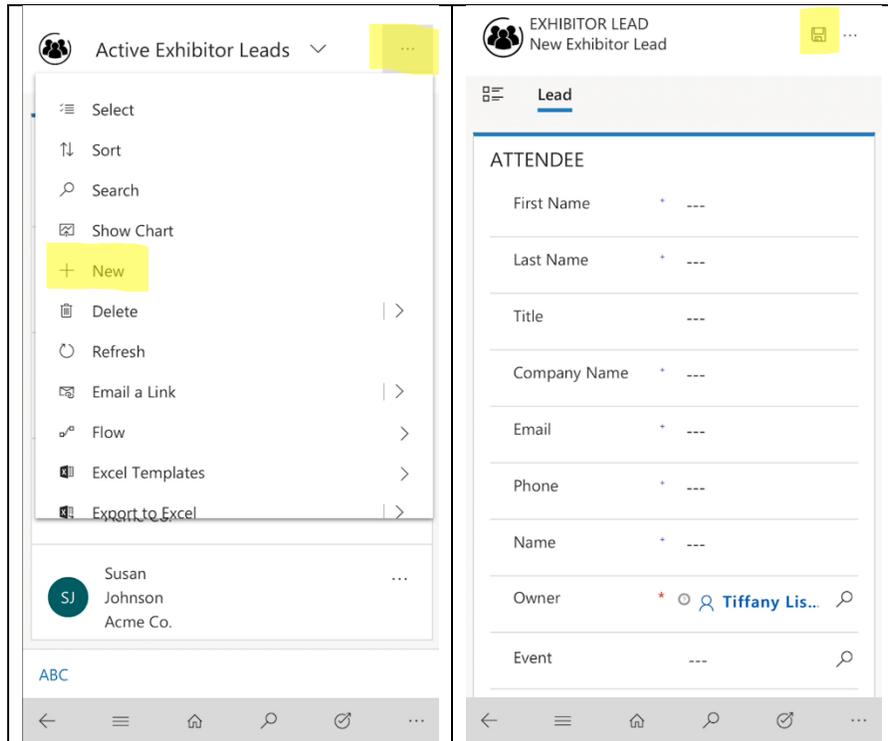


EXHIBITOR LEADS

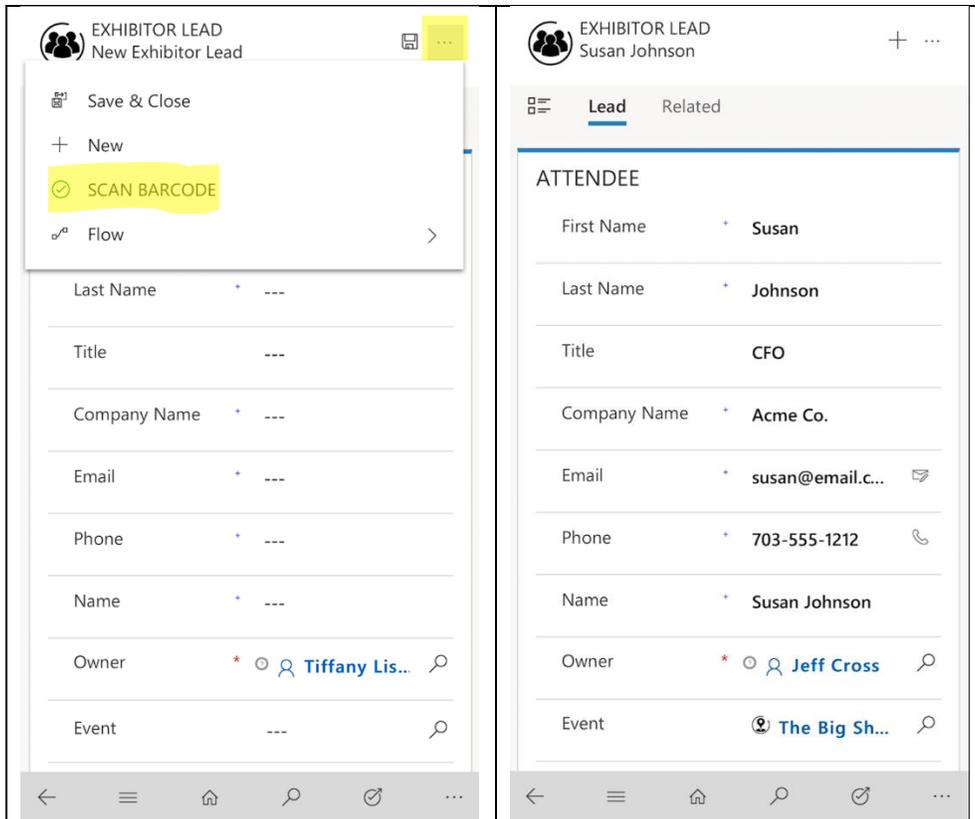
1. To view a list of Active Exhibitor Leads, choose Exhibitor Leads from the home screen.



2. A new Exhibitor Lead can be entered manually. Press ... then +NEW. Enter information and Save.



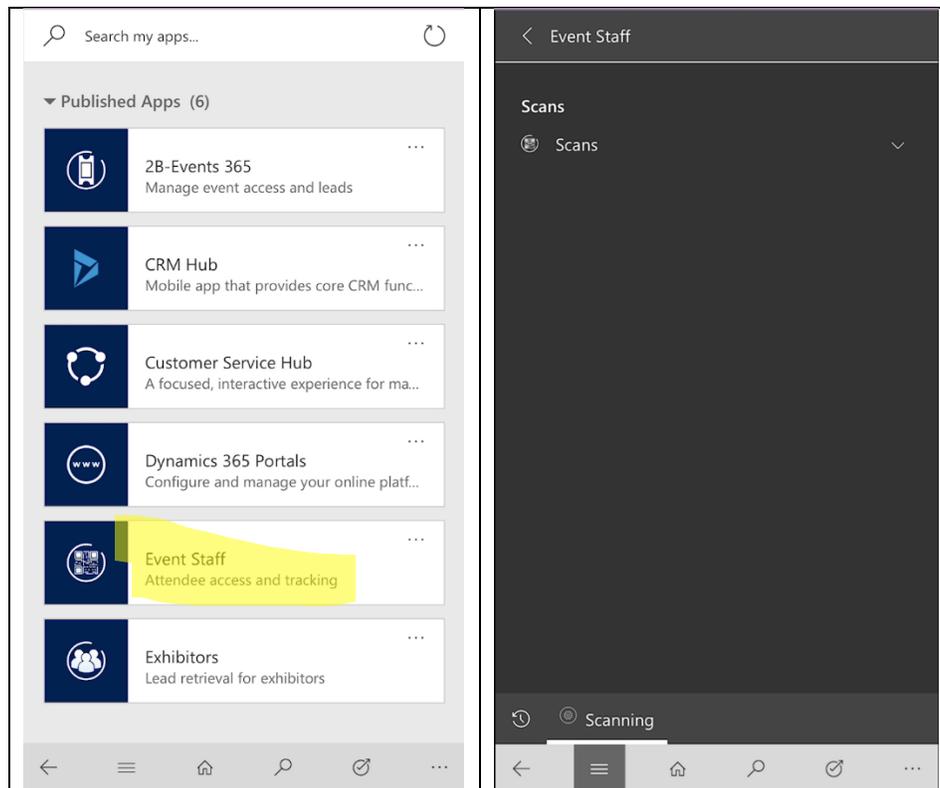
4. To enter a new Exhibitor Lead by scanning a QR Code, press ... then Scan Barcode. The device camera will open and the QR Code can be scanned. The Exhibitor Lead record will auto-populate based on the QR Code.



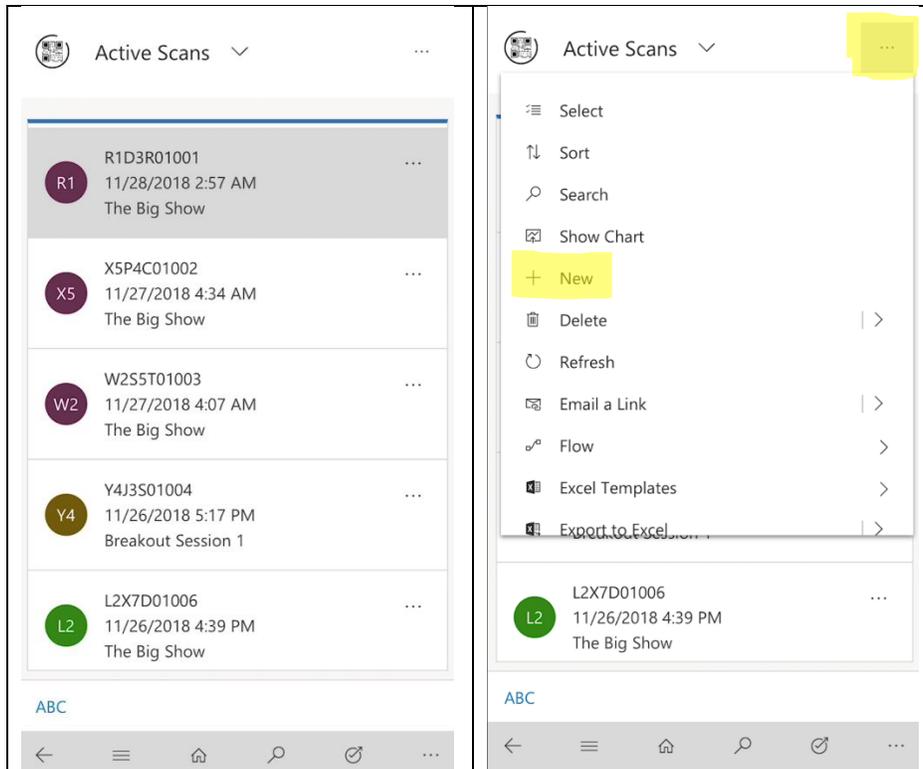
2B-EVENTS MOBILE APP FOR EVENT STAFF

There is a separate mobile app for on-site event staff to streamline ticket/badge scanning and printing. This mobile application is intended for use by those event personnel who will be scanning attendee tickets and/or printing on-site and only includes the Scan functionality.

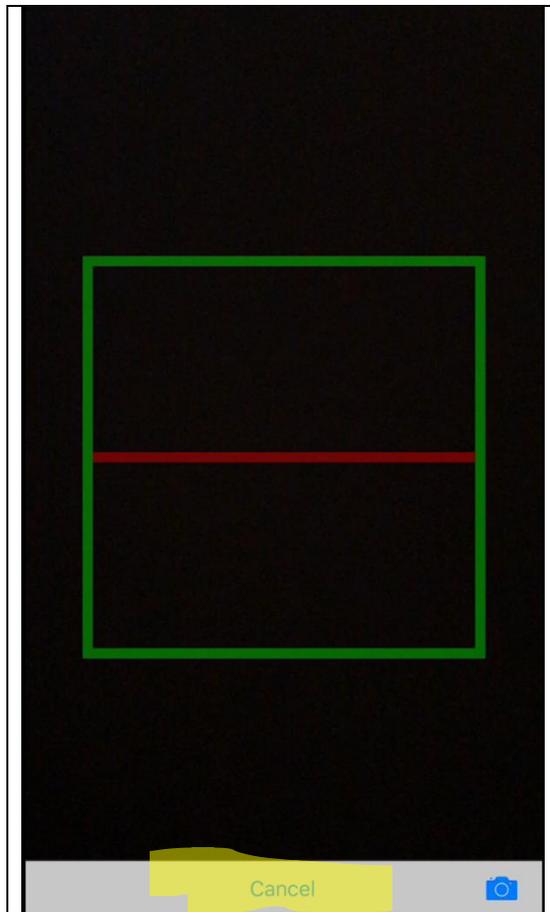
1. After logging into your Dynamics 365 mobile application, select the Event Staff application.



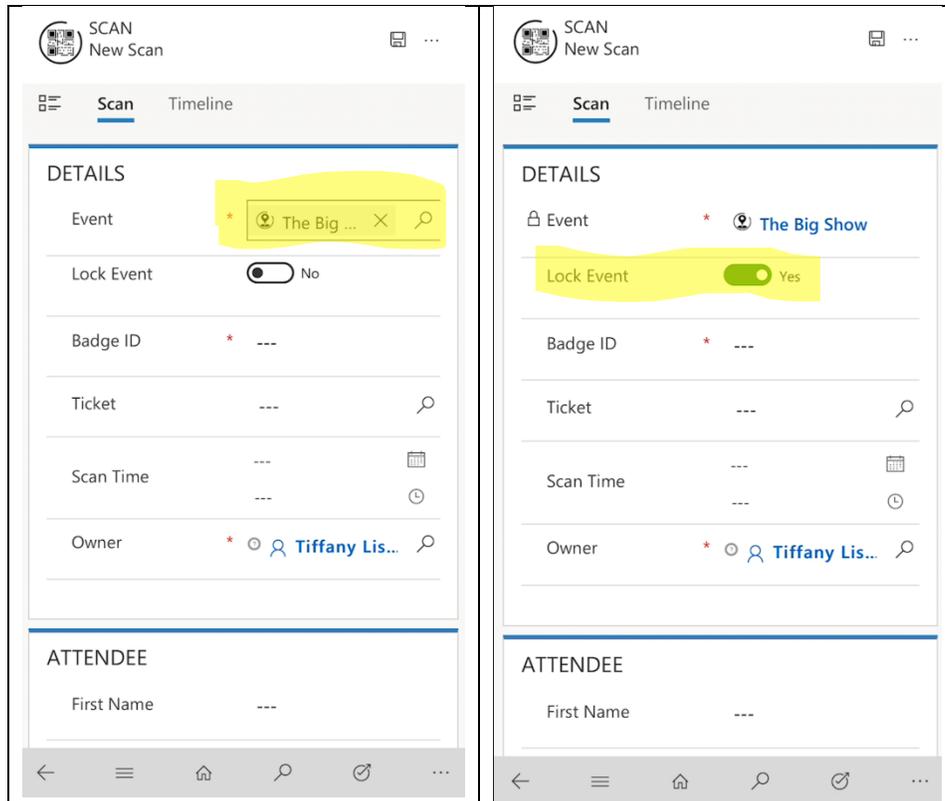
2. To set up the app to begin a series of ticket scans, choose Scans. Then choose ... and + New.



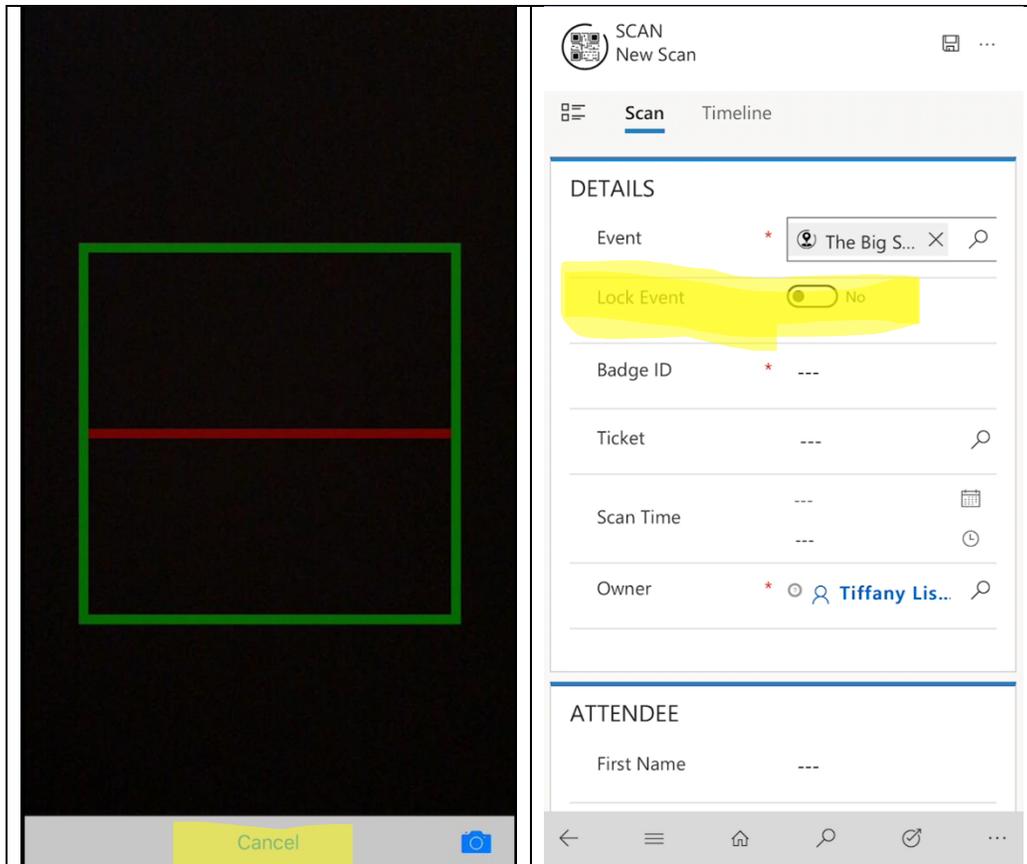
3. At this point, the device may automatically open the camera. Hit Cancel to continue setting up for ticket scanning.



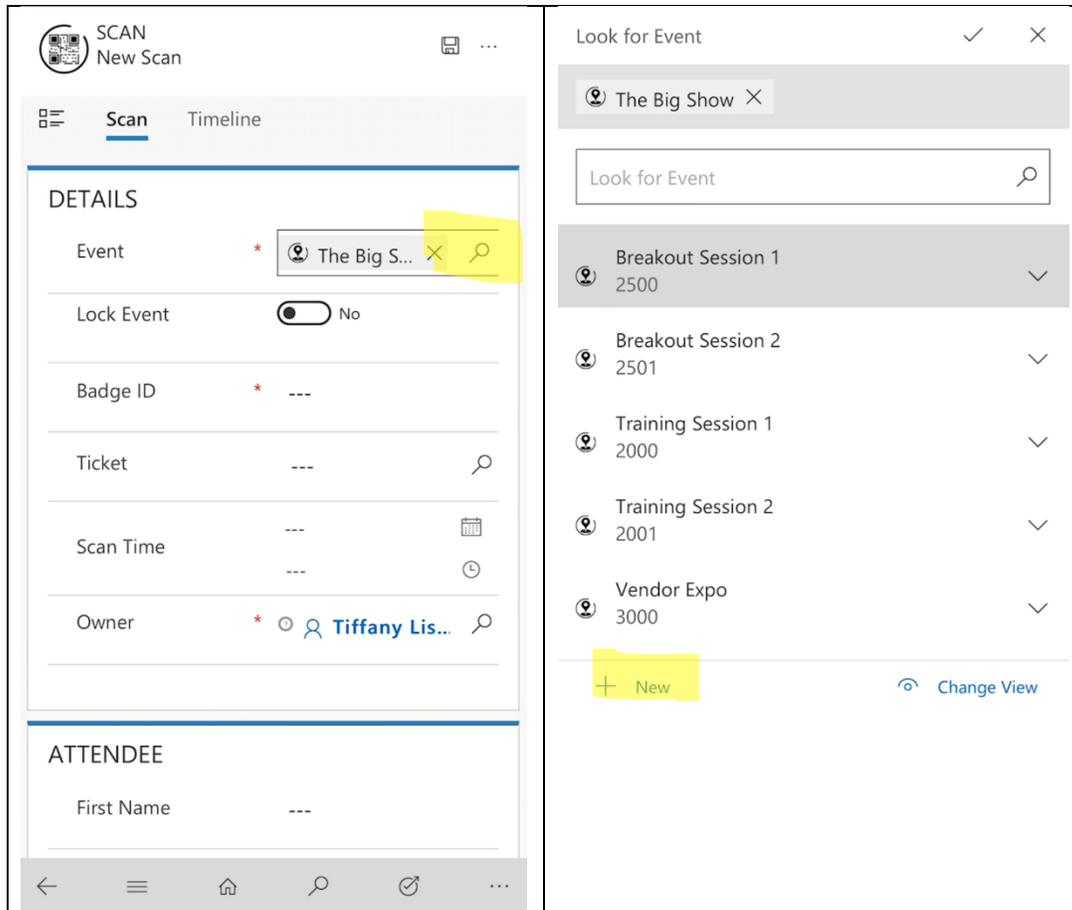
4. The screen will return to a new Scan record. Search for the related Event. Then toggle Lock Event to YES. This locks the Event and allows for multiple ticket scans for the same event.



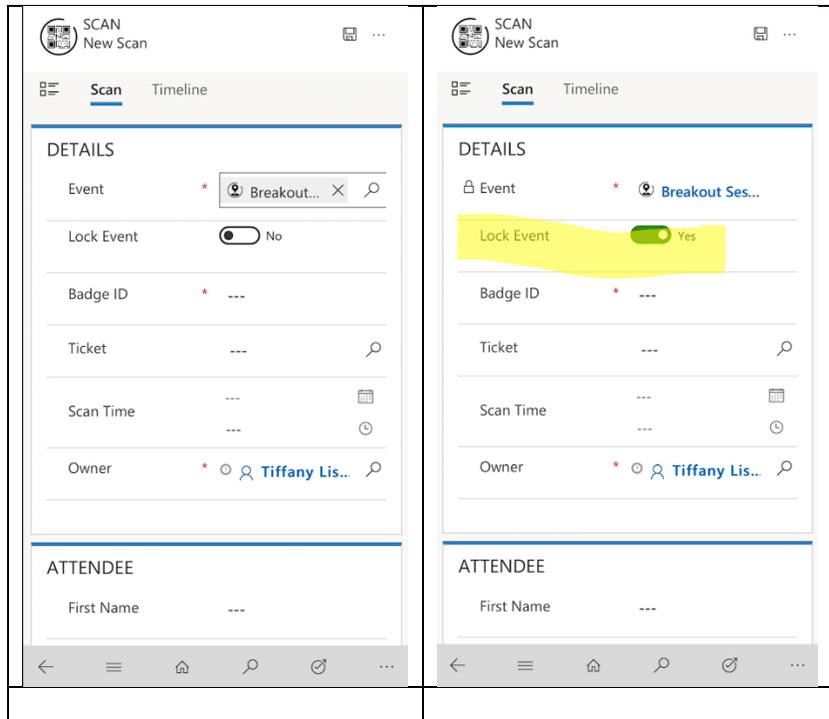
5. The device camera will open allowing the QR Code to be scanned. The form will auto-populate with the scan information, auto-save and reopen the camera to scan the next ticket. Tickets can continue to be scanned in this way until the Event is over or until the related Event needs to be changed.
6. To change to another Event, press Cancel on the camera screen.



7. Search for a new Event by using the Event search box. There is also an option to create a new Event if needed. Simply choose + New and enter the Event information.



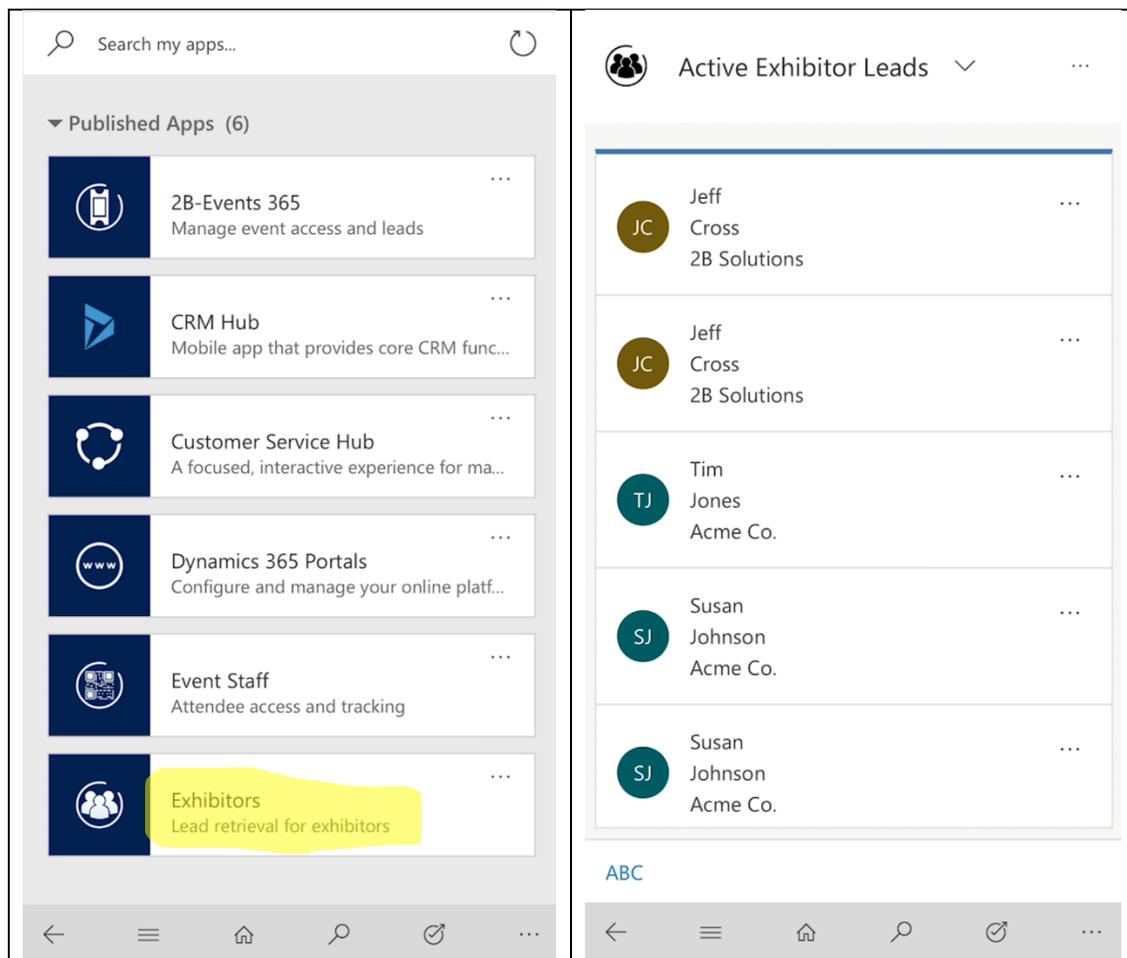
8. Select the new Event. Toggle Lock Event to YES and continue scanning tickets for the new Event as instructed above.



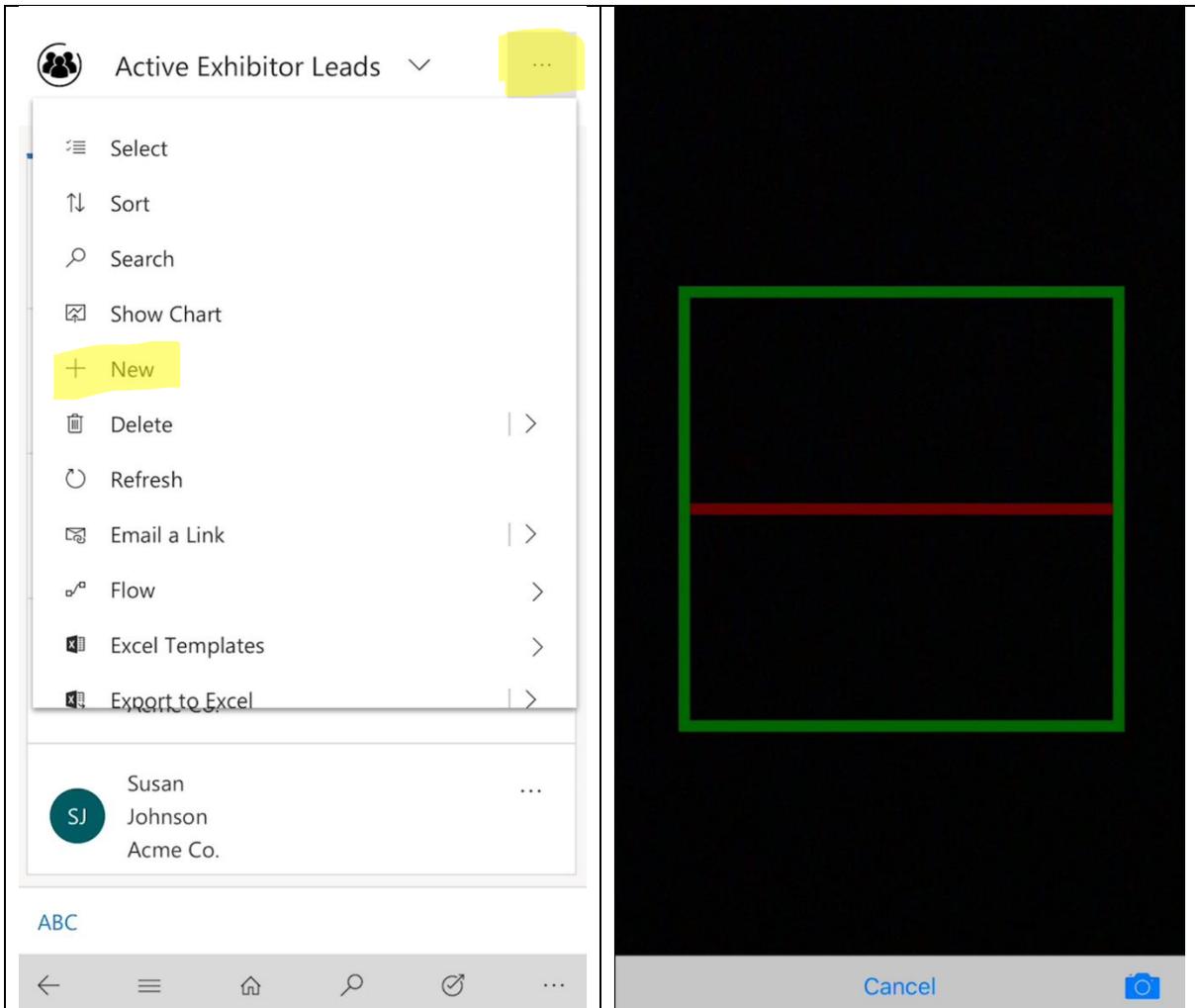
2B-EVENTS MOBILE APP FOR EXHIBITORS

2B-EVENTS 365 also offers a mobile application for exhibitors which allows them to scan attendees' QR Codes for lead information.

1. After logging into the Dynamics 365 mobile application, select the Exhibitors application. The default view shows all Active Exhibitor Leads.



2. To scan a new Lead, press ... then + New. The device will open the camera for scanning.



3. Scan the attendee's QR Code and the form will auto-populate with lead information.
4. Lead information can be retrieved either by exporting the information from 2B-EVENTS 365 in .CSV format (see [VIEW EXHIBITOR LEADS](#)) or by using the optional web portal (see [OPTIONAL WEB PORTAL FOR EXHIBITORS](#)).

INFORMATION ON OPTIONAL WEB PORTAL

There is an optional web portal available for both Attendee and Exhibitor use. If given a log in and password, Attendees can register for upcoming events and Exhibitors can log into the web portal to retrieve lead information gathered in the [2B-EVENTS APP FOR EXHIBITORS](#).

To learn more about the web portal, contact us at sales@2bsolutions.com.

HELPFUL LINKS

Although there are some “out-of-the-box” configurations which suit the User perfectly, most of the time that is not the case. For instance, the User will often want to modify the forms, form fields, views, etc. Because 2B-EVENTS365 was built on Dynamics 365, the configuration tools for Dynamics 365 can be used within 2B-EVENTS 365 as well. The following are the most commonly asked for configurations.

In addition to the custom configurations, most Users are going to want to take advantage of the integrations between Dynamics 365, 2B-EVENTS 365 and other Microsoft products (SharePoint, OneNote, Outlook, Word, etc.) See links below for more information on these integrations as well.

If unfamiliar with the functionality of **Microsoft Dynamics 365**, the basics are covered at <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/basics-guide>. As the following subjects are far from exhaustive of the features of Dynamics 365 or 2B-EVENTS 365, more information can be found at <https://docs.microsoft.com/en-us/dynamics365>.

Create or Edit Dashboards

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-dashboards>

Create and Edit Fields (Attributes)

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-fields>

Create and Design Forms

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-design-forms>

Create and Edit Views

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-views>

Create Connections to Define and View Relationships Between Records

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/create-connections-view-relationships-between-records>

Set up Dynamics 365 (online) to use SharePoint

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-dynamics-365-online-to-use-sharepoint-online>

Set up OneNote Integration

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-onenote-integration-in-dynamics-365>

Dynamics 365 App for Outlook User Guide

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-app/dynamics-365-app-outlook-user-s-guide>

Word Templates within Dynamics 365

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/using-word-templates-dynamics-365>

Excel Templates within Dynamics 365

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/analyze-your-data-with-excel-templates>

ABOUT 2B SOLUTIONS, INC.

Headquartered in Birmingham, Alabama, 2B Solutions, Inc. specializes in custom Dynamics 365 and mobile applications. Our custom solutions allow our customers to manage any kind of resources. From company car/truck fleets, to medications throughout a pharmacy, to dog trainers and their schedules, we improve the ability of businesses to respond to their customers and critical events from anywhere.

Our custom solutions include 2B-LAW 365, a legal management solution for law firms of all sizes, WIMS 365, a warehouse, asset and inventory management solution, WIMS for STEM, an inventory management solution specifically for STEM education materials centers and 2B-EVENTS 365, an attendee and ticket management solution.

2B Solutions has also developed custom add-ons for NCR Counterpoint such as 2B-Inventory, 2B-Picking, 2B-Sales and 2B-PriceChecker.

We are a Microsoft Partner with competencies in Microsoft Mobility Solutions, Microsoft Business Solutions and ISV/Software Solutions.

