2B-EVENTS 365 USER GUIDE

2B Solutions, Inc.

Version 2.1.0.0

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

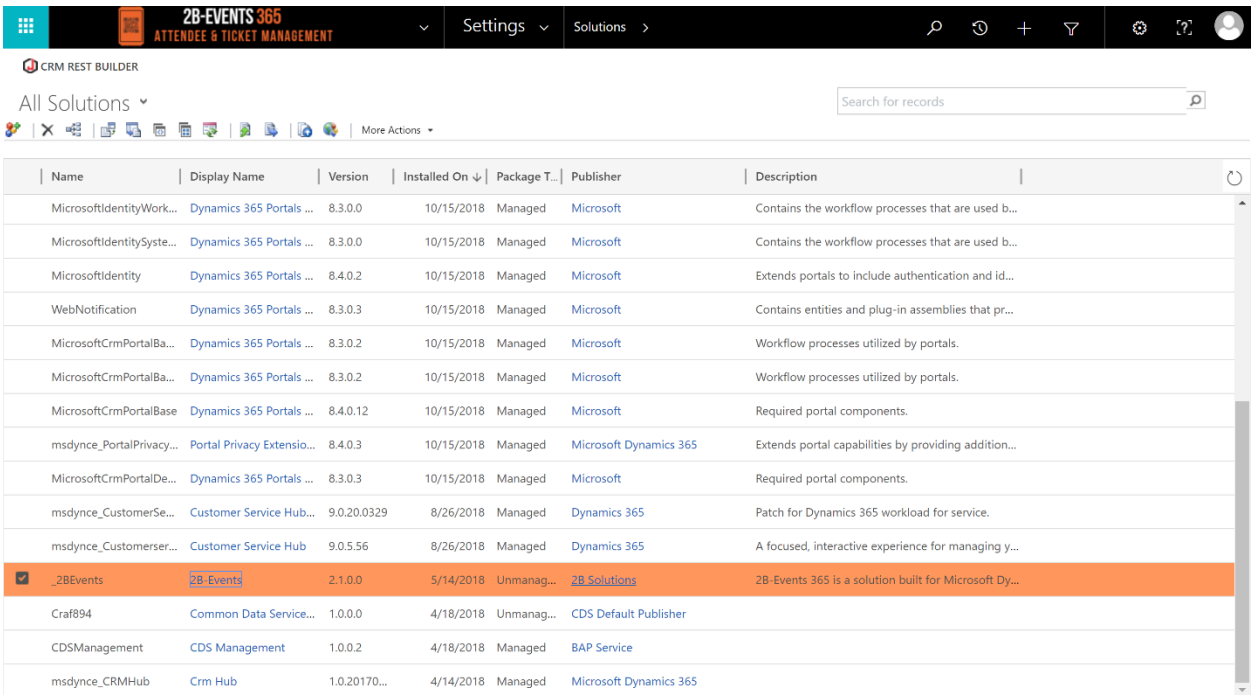
To Install: Save the files to your desktop and import the .zip file into your Dynamics 365 instance by choosing Settings/Solutions/Import. Once the solution completes the import, choose Publish All Customizations from the ribbon bar and continue with the instructions in the document to configure the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

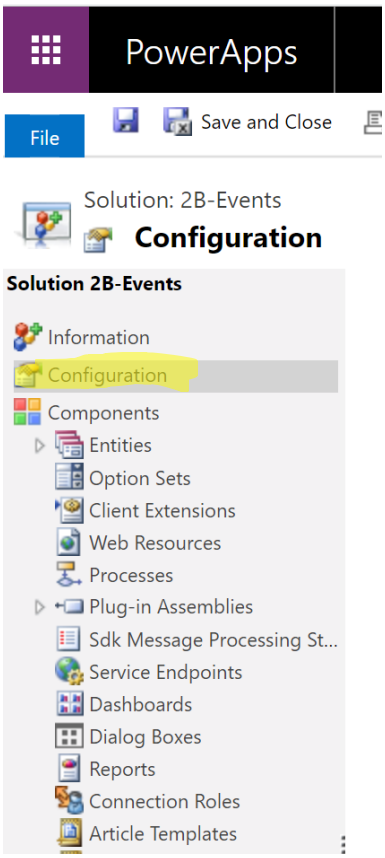
Step 1. License Registration

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



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...
_2BEvents	2B-Events	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	

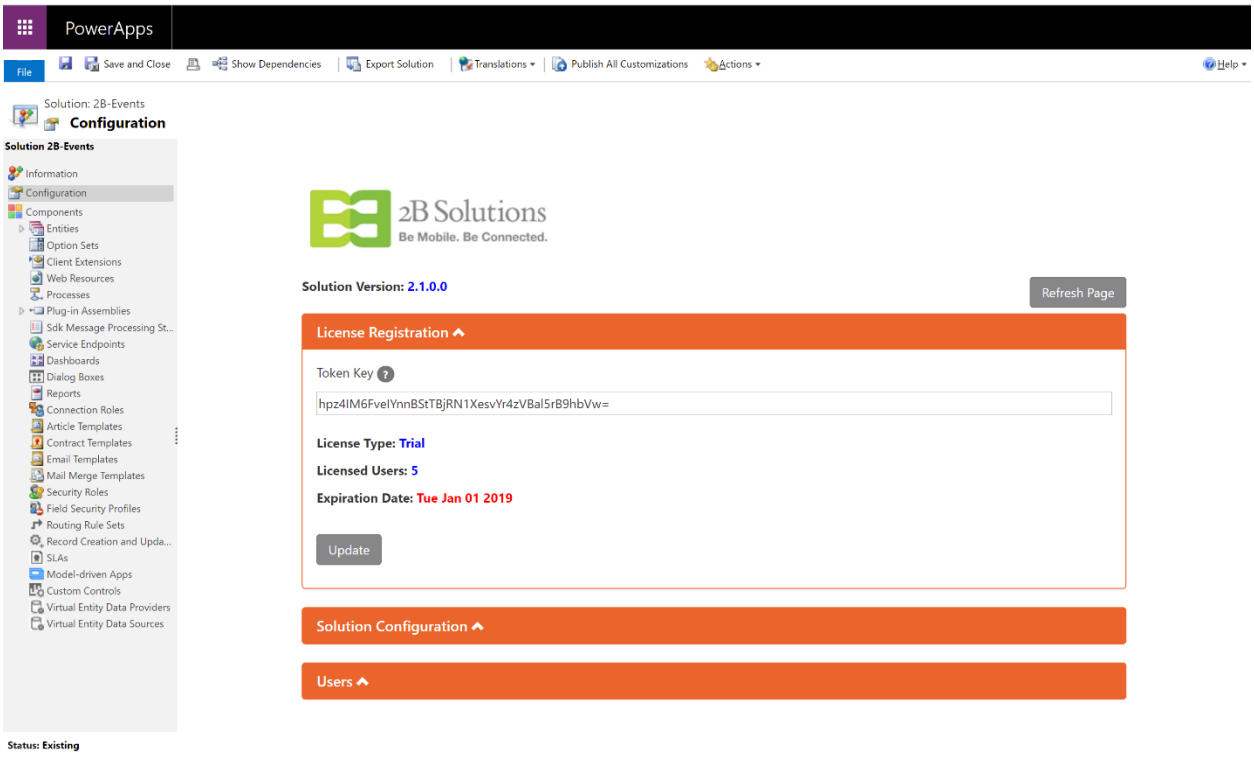
Open the solution, and you should be in the **Configuration** node of your Solution environment.



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**.

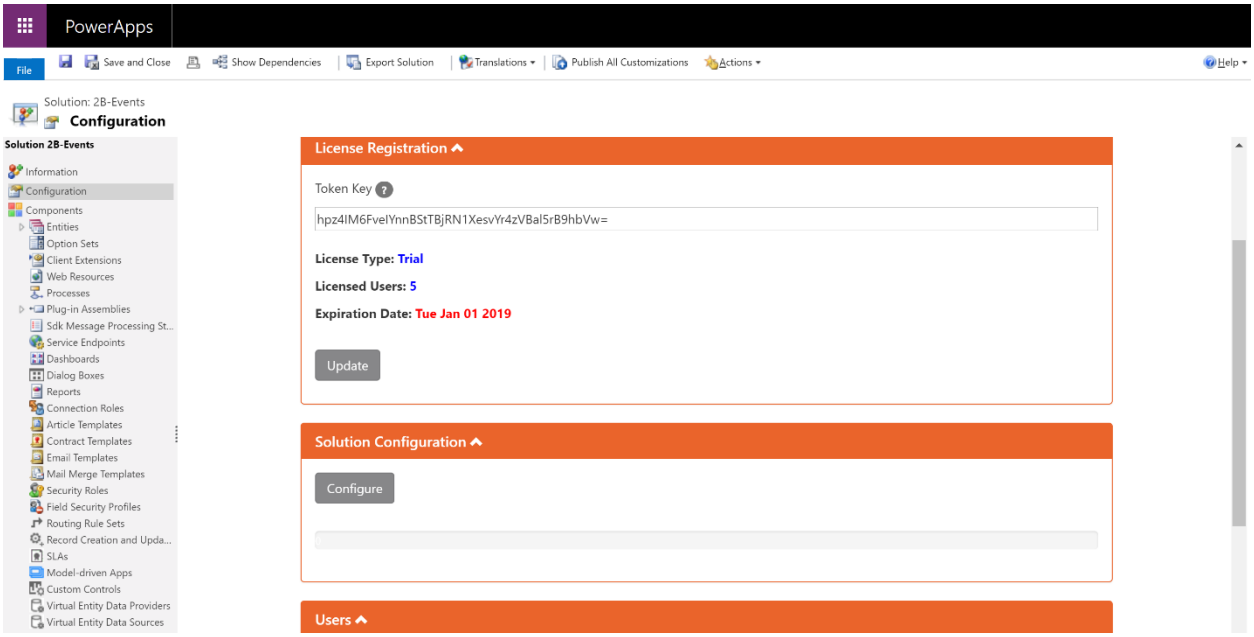
NOTE: The token code is sent to you in a separate email. Copy and paste the code into the text box.

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.



Step 2. Solution Configuration

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



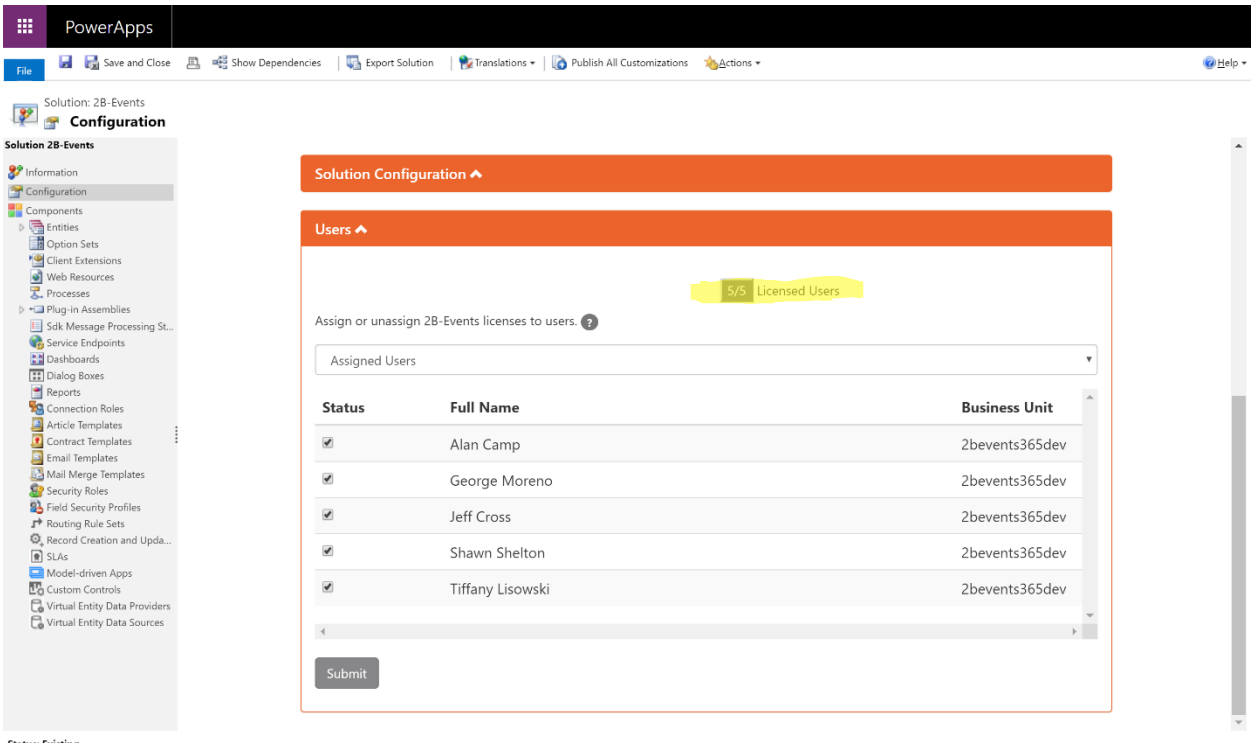
Select Solution Configuration and then select the **Configure** button.

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

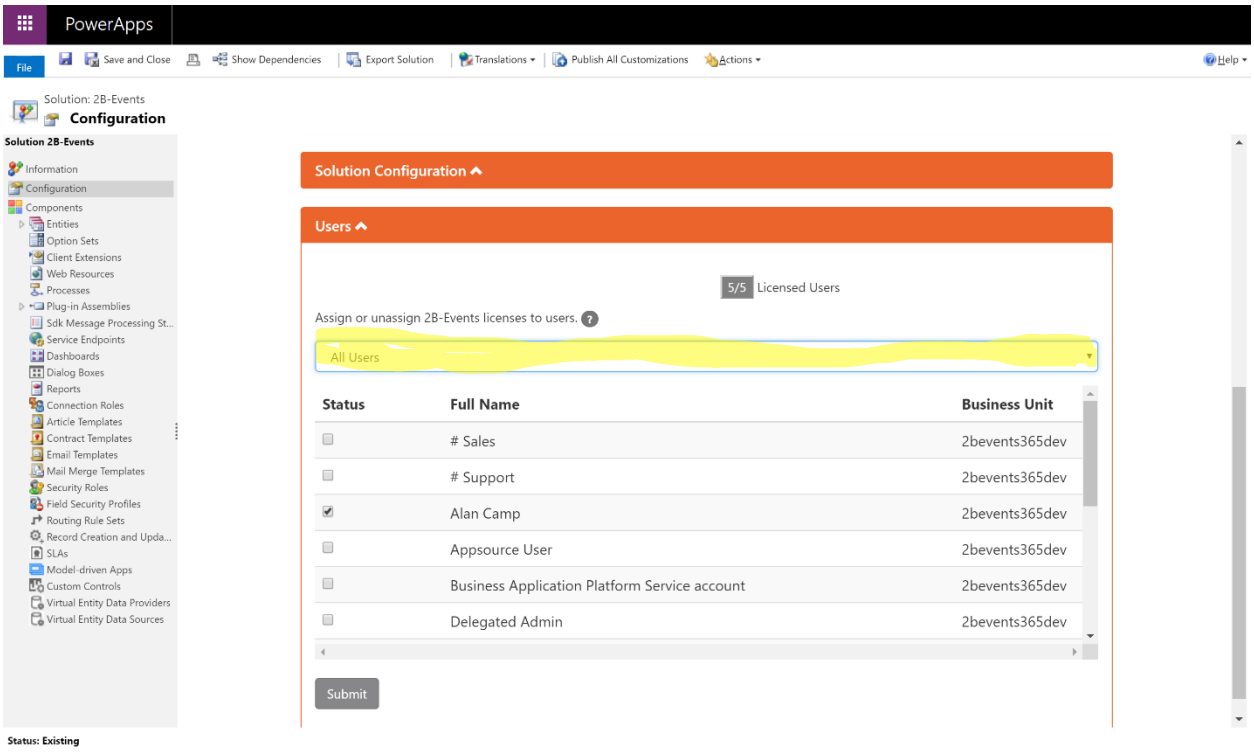
Once the configuration is successful, the progress bar below will complete (if any popup messages appear, choose “Ok” and the progress bar will complete).

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.



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**.



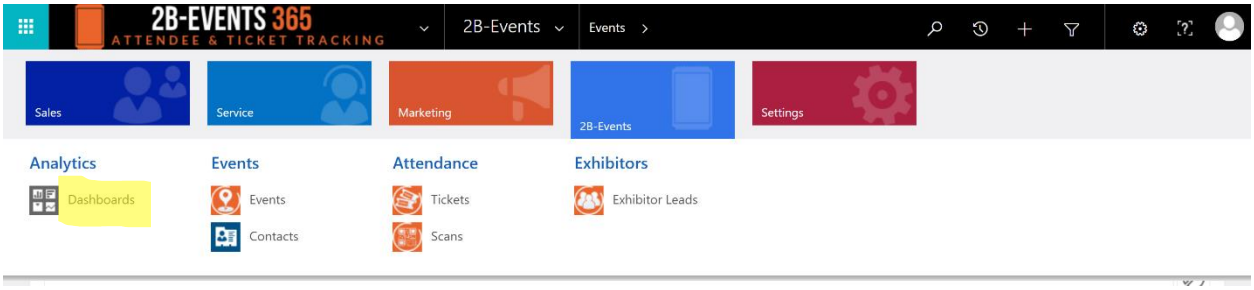
License Registration, Solution Configuration and Users Complete!

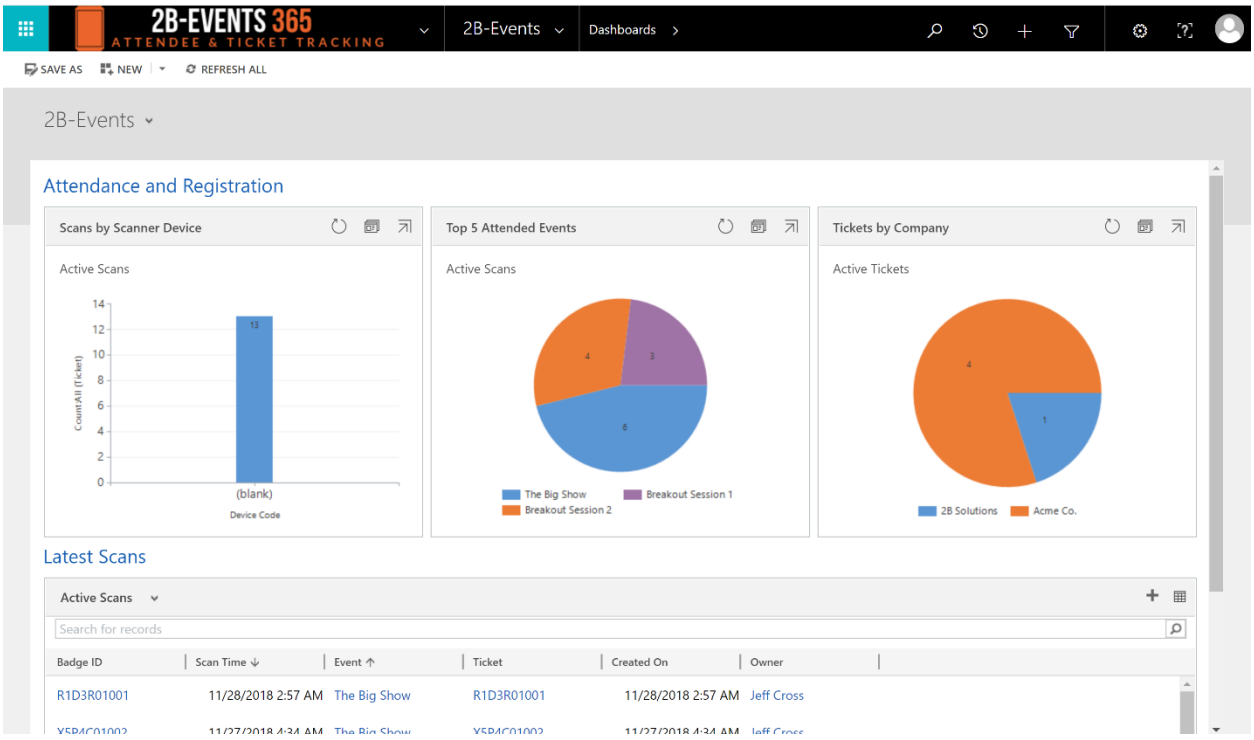
NAVIGATING THE CORE 2B-EVENTS 365 APPLICATION

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

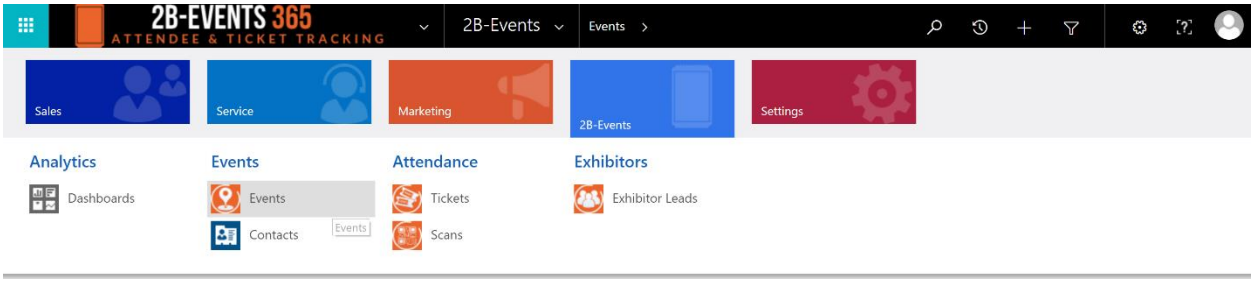




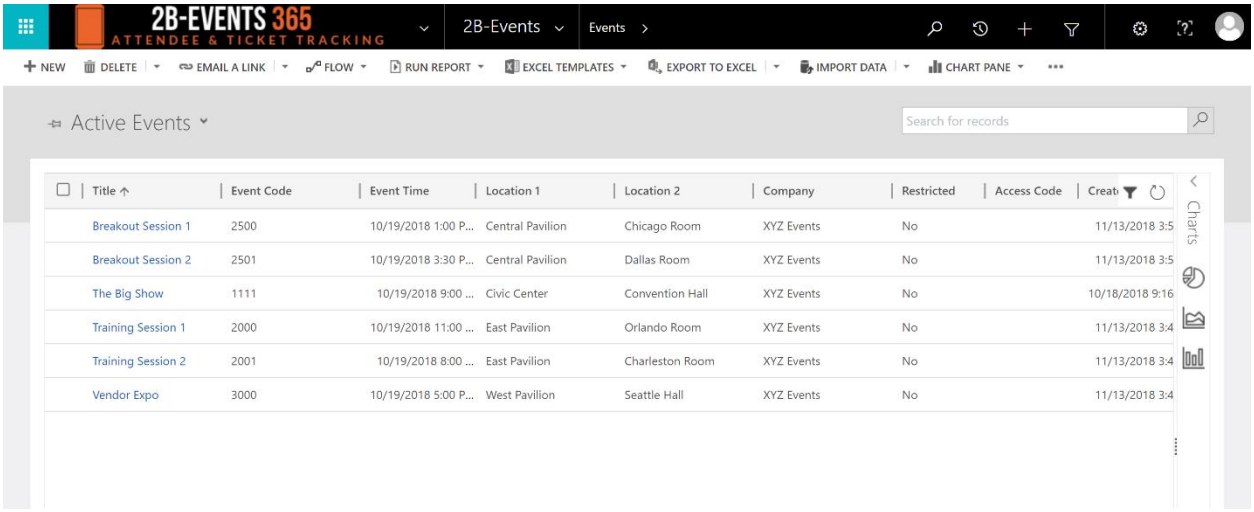
EVENTS

CREATING NEW EVENTS

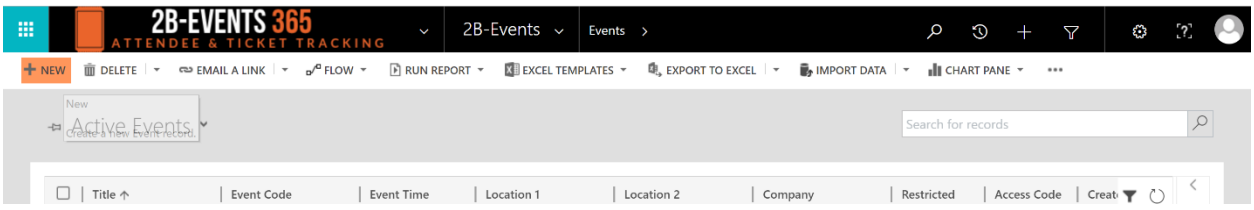
1. To navigate to Events, go to 2B-EVENTS → Events



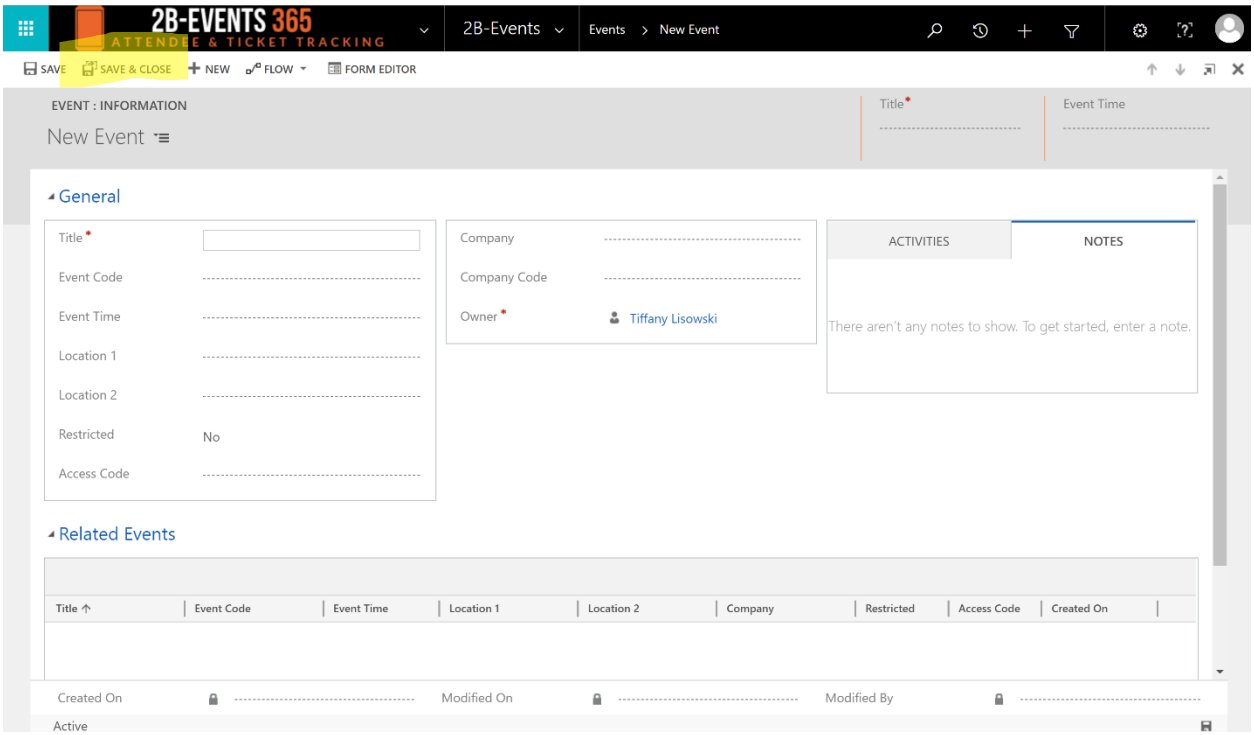
2. The view of Active Events is the default view. (To view Inactive Events, use the arrow to the right of Active Events.) To create new or edit existing views, see Create & Edit Views.

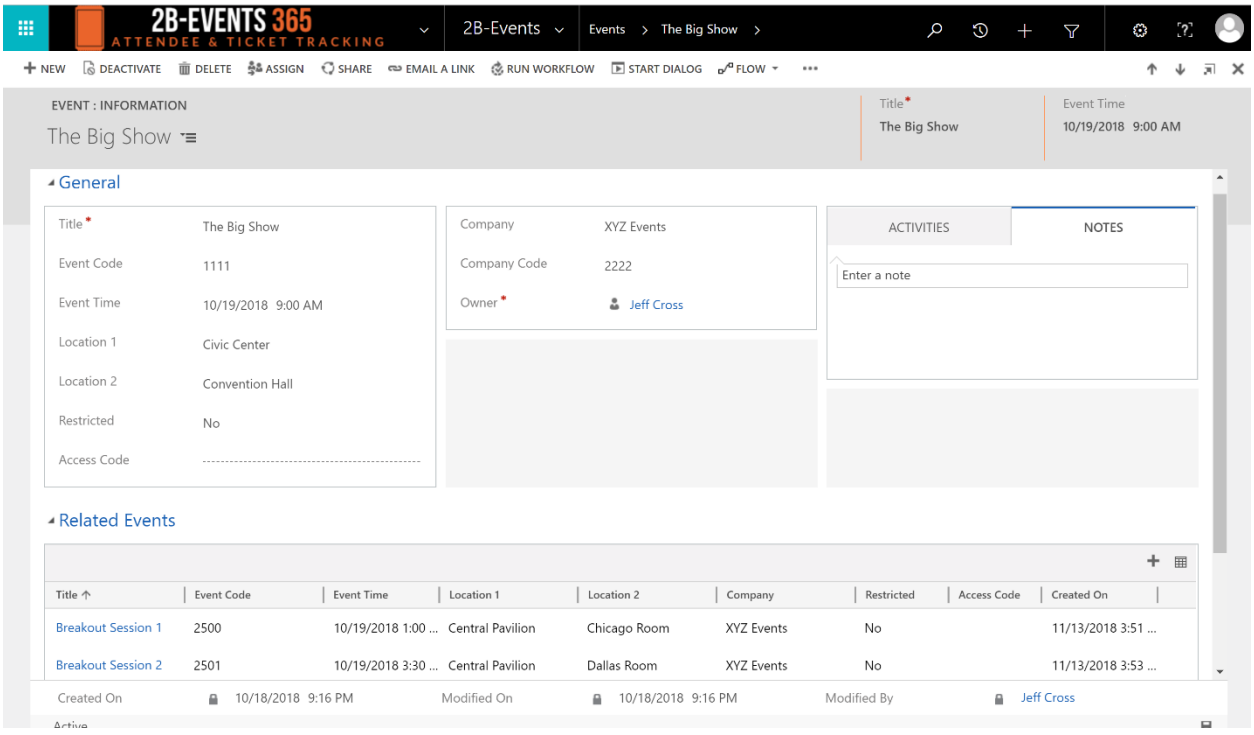


3. To enter a New Event, click +NEW.



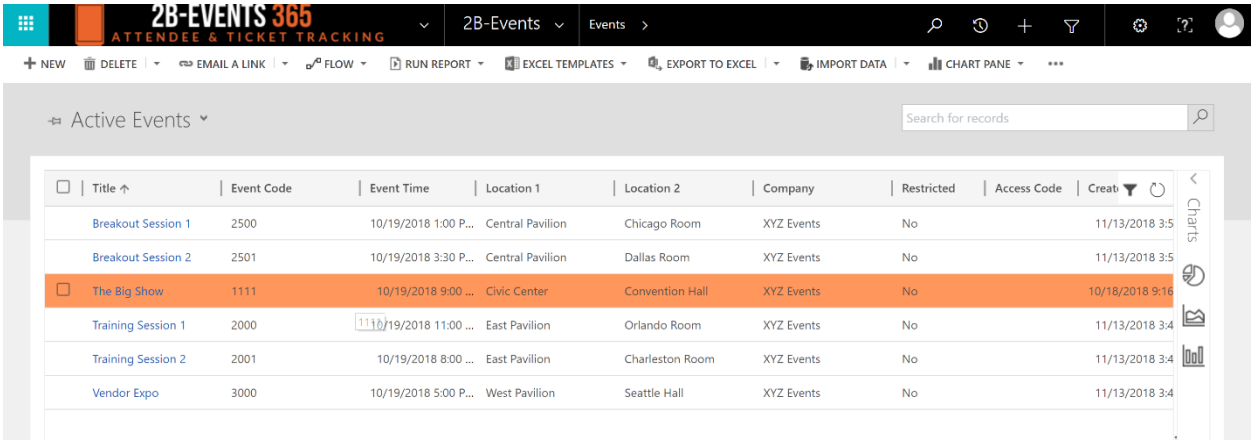
4. Enter information within the blank New Event form and then SAVE & CLOSE. While the default New Event form cannot be modified, new fields and forms can be created to reflect the information you need. See Create and Edit Fields (Attributes) and Create & Design Forms.


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

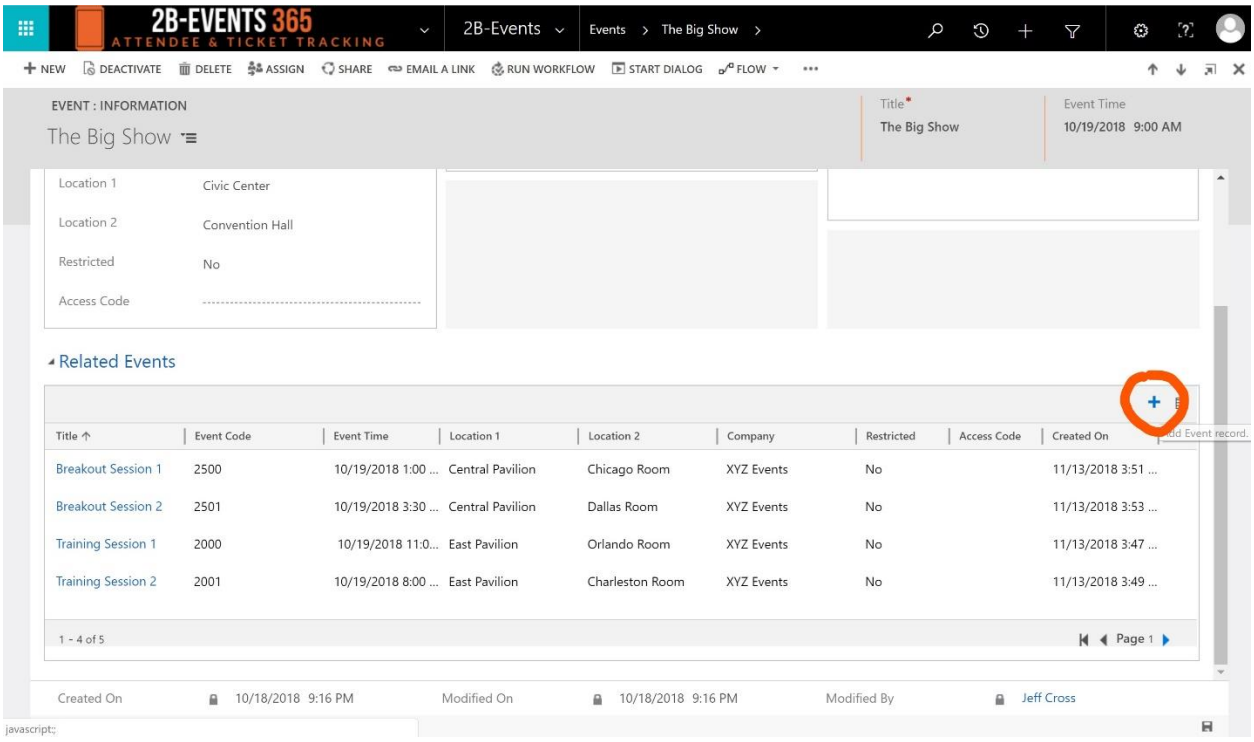

2B-EVENTS 365
ATTENDEE & TICKET TRACKING
2B-Events
Events > The Big Show
NEW
DEACTIVATE
DELETE
ASSIGN
SHARE
EMAIL A LINK
RUN WORKFLOW
START DIALOG
FLOW
EVENT : INFORMATION
The Big Show
Title*
The Big Show
Event Time
10/19/2018 9:00 AM
General
Title*
The Big Show
Event Code
1111
Event Time
10/19/2018 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

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

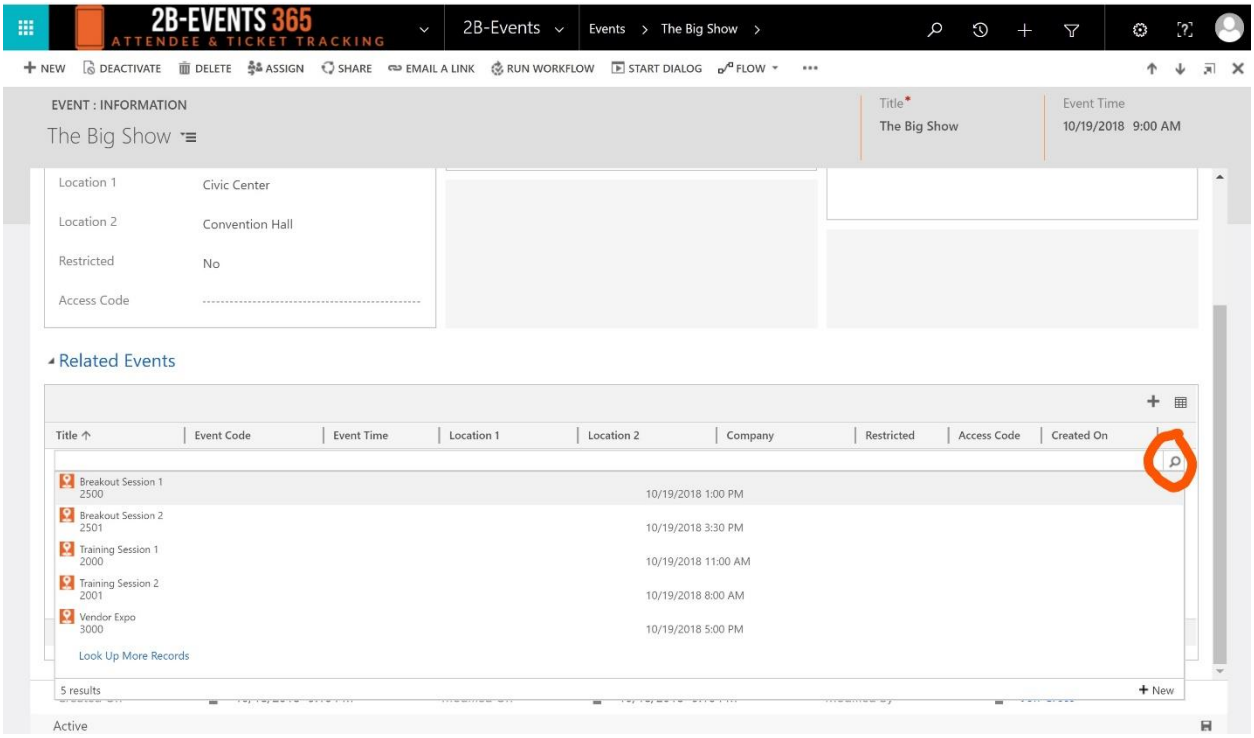
1. Navigate to the main Event. Go to 2B-Events → Events → Double-click on the appropriate Active Event.



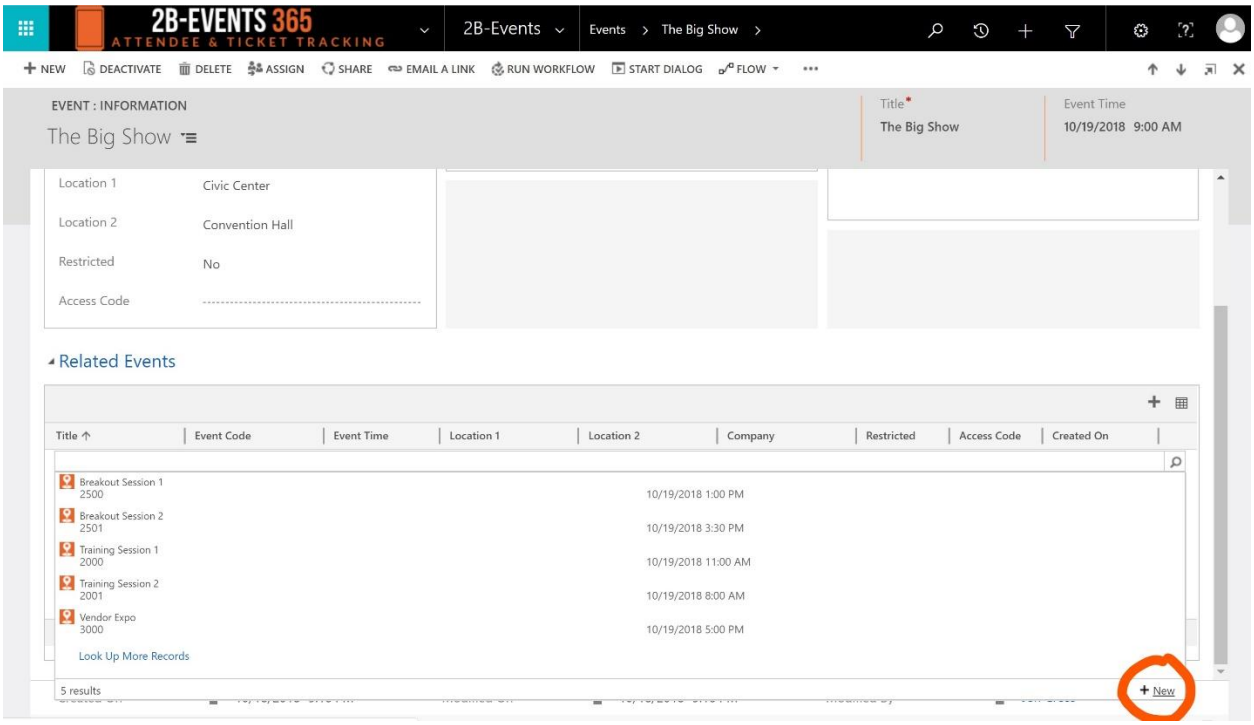
2. Scroll down to Related Events and click +.



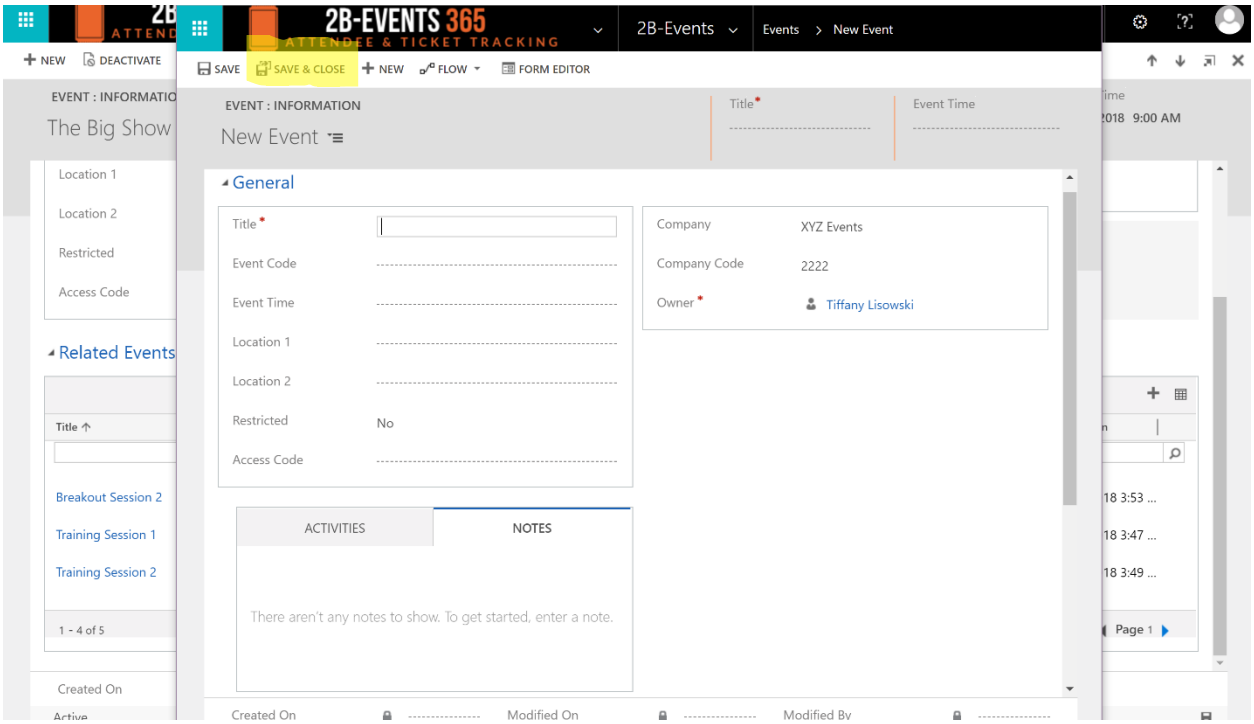
3. To relate an Event that already exists, click the search icon and search for the Event.



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



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

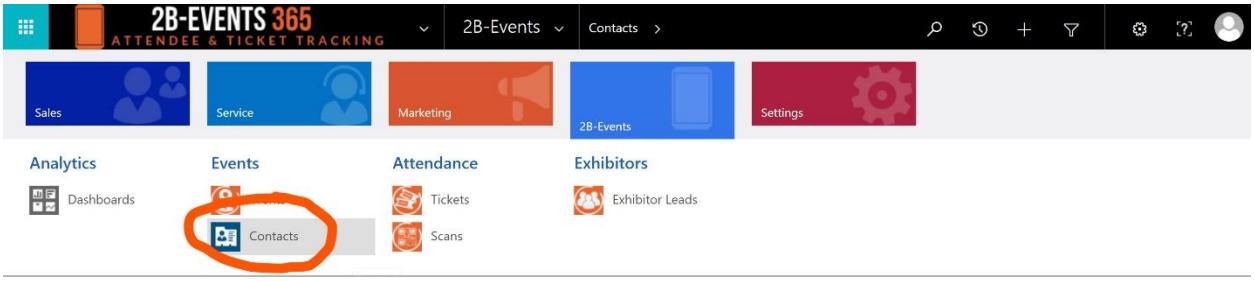


CONTACTS

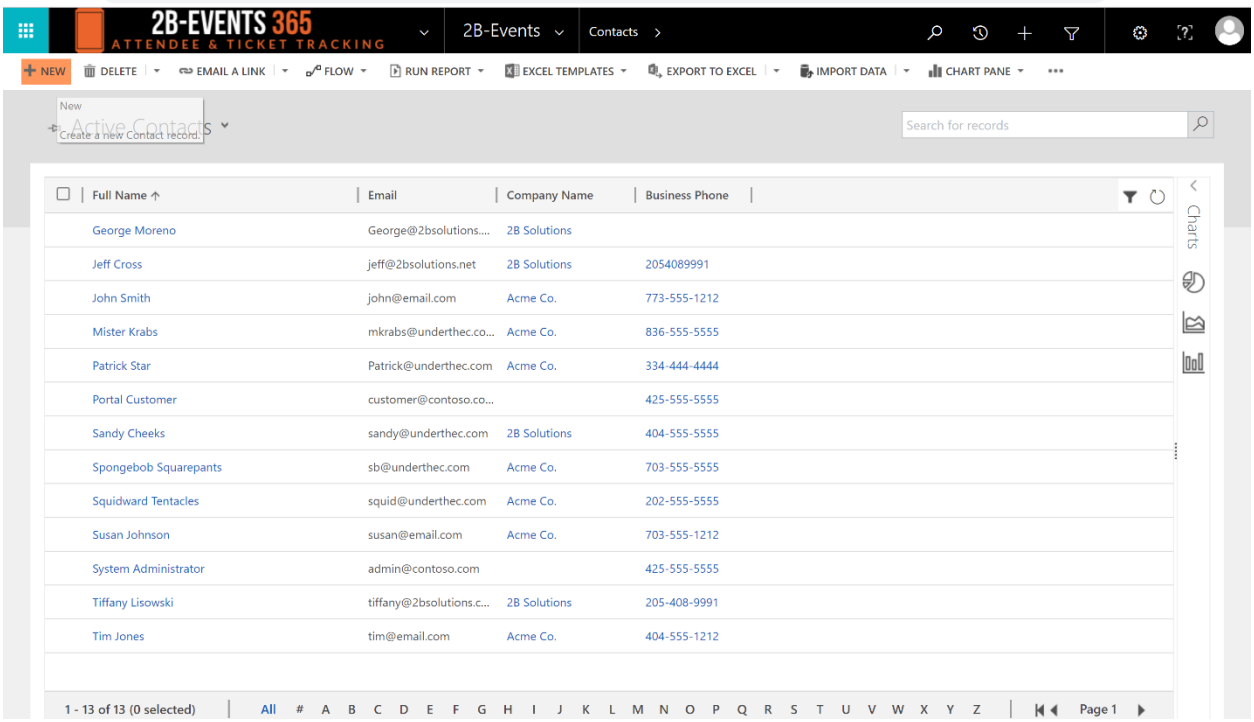
CREATING NEW CONTACTS

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].

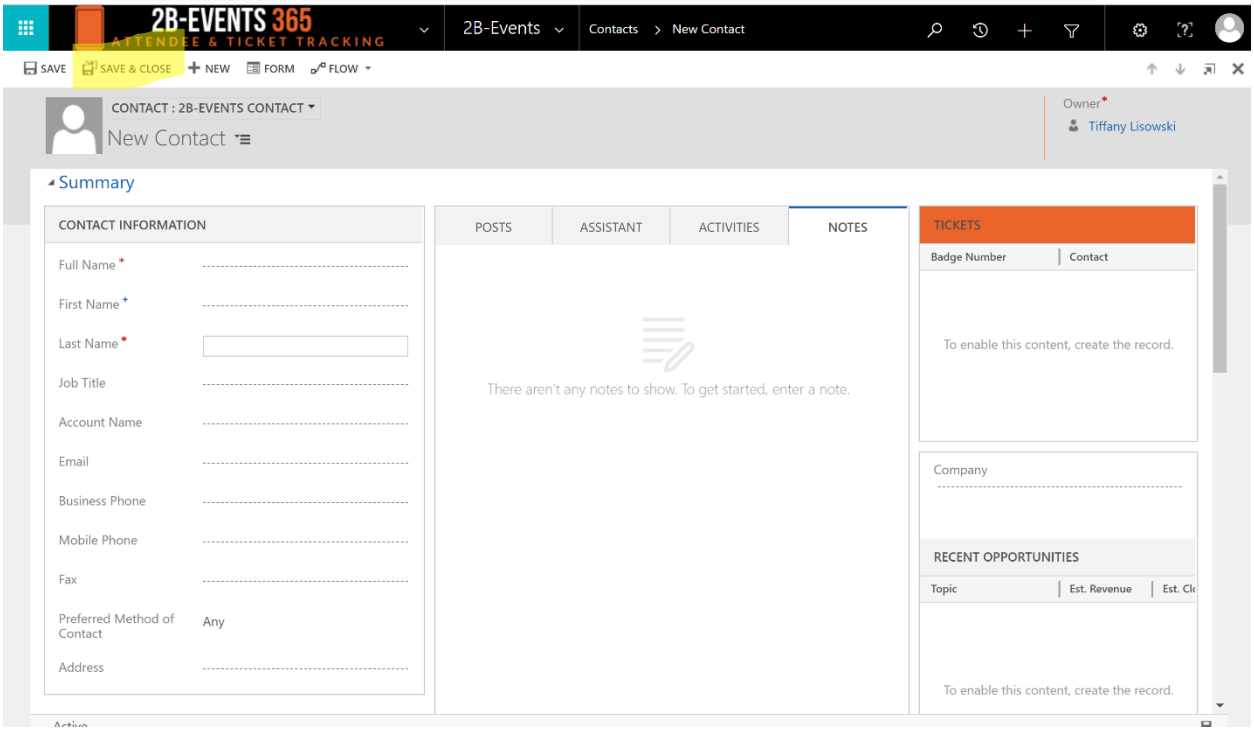
1. Navigate to 2B-EVENTS → Events → Contacts



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.

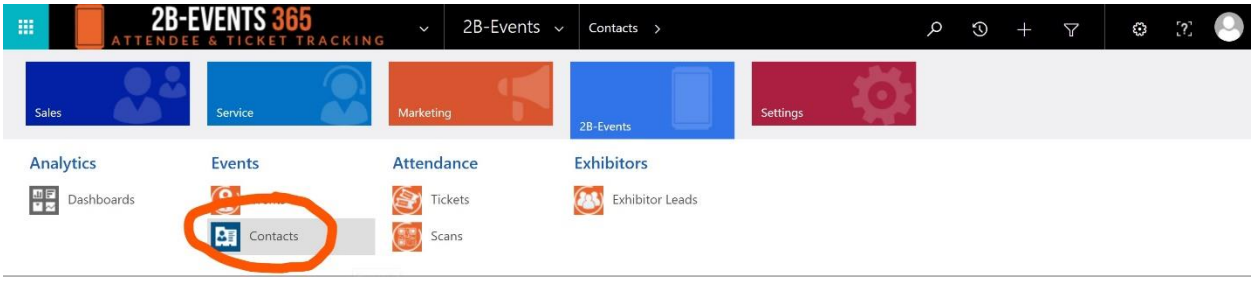


3. Enter information in the 2B-EVENTS Contact form. The 2B-EVENTS Contact form cannot be edited. However, new forms and fields can be created. See Create and Edit Fields (Attributes) and Create & Design Forms to learn more. Click SAVE & CLOSE.

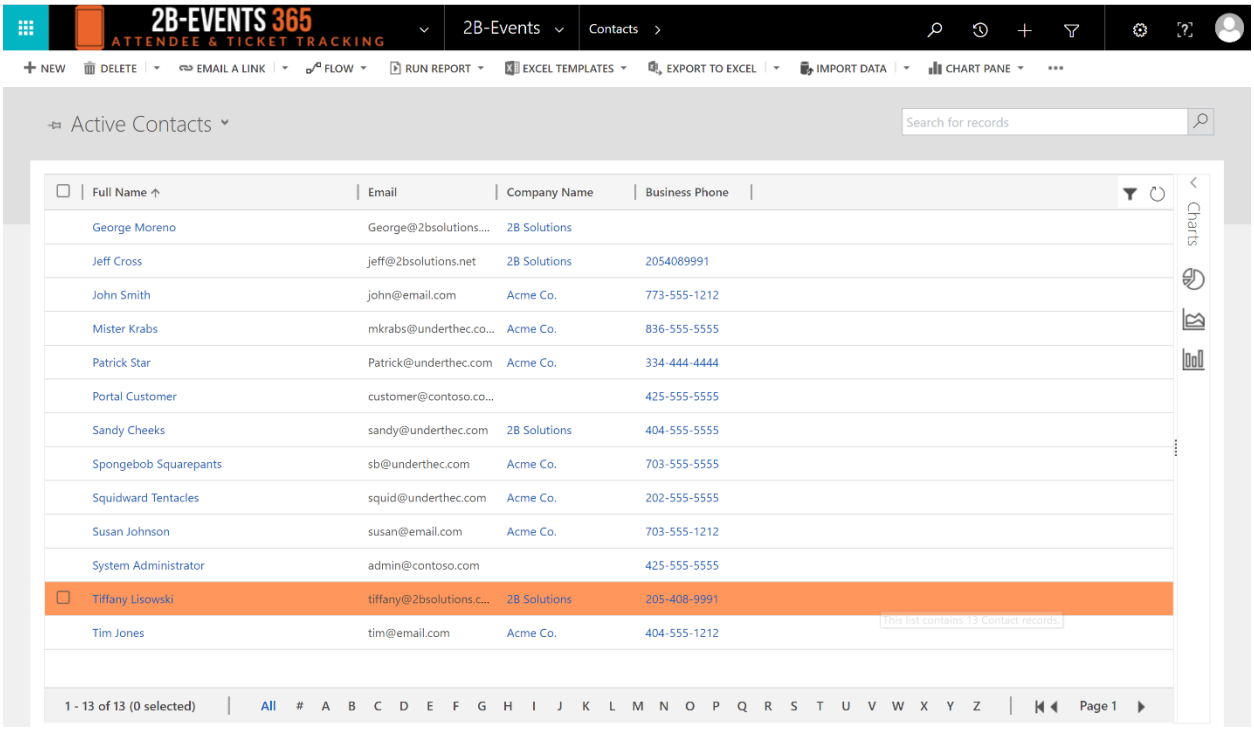


VIEW EXISTING CONTACTS

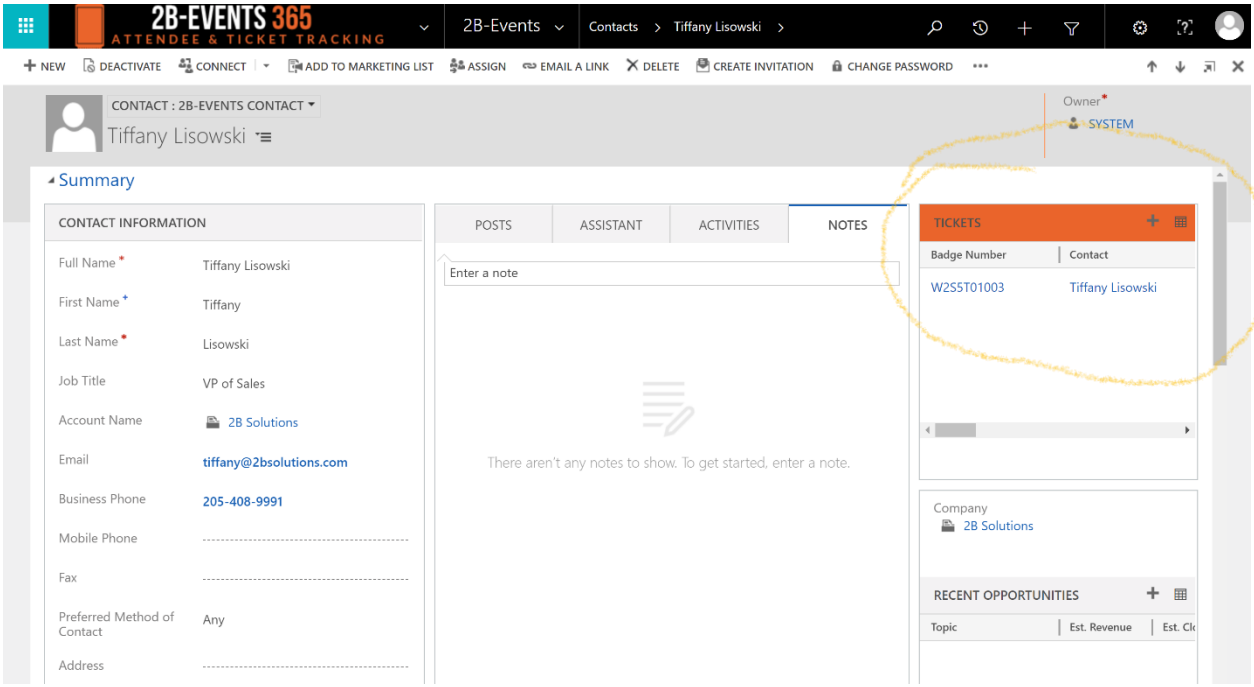
1. Navigate to 2B-EVENTS → Events → Contacts



2. Double-click on the Contact record.



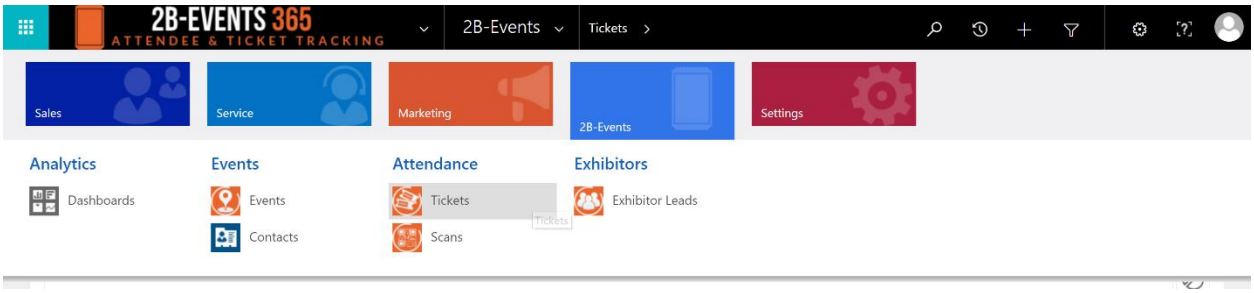
3. On the 2B-EVENTS Contact form, sections showing Ticket information related to the Contact is located on the right.



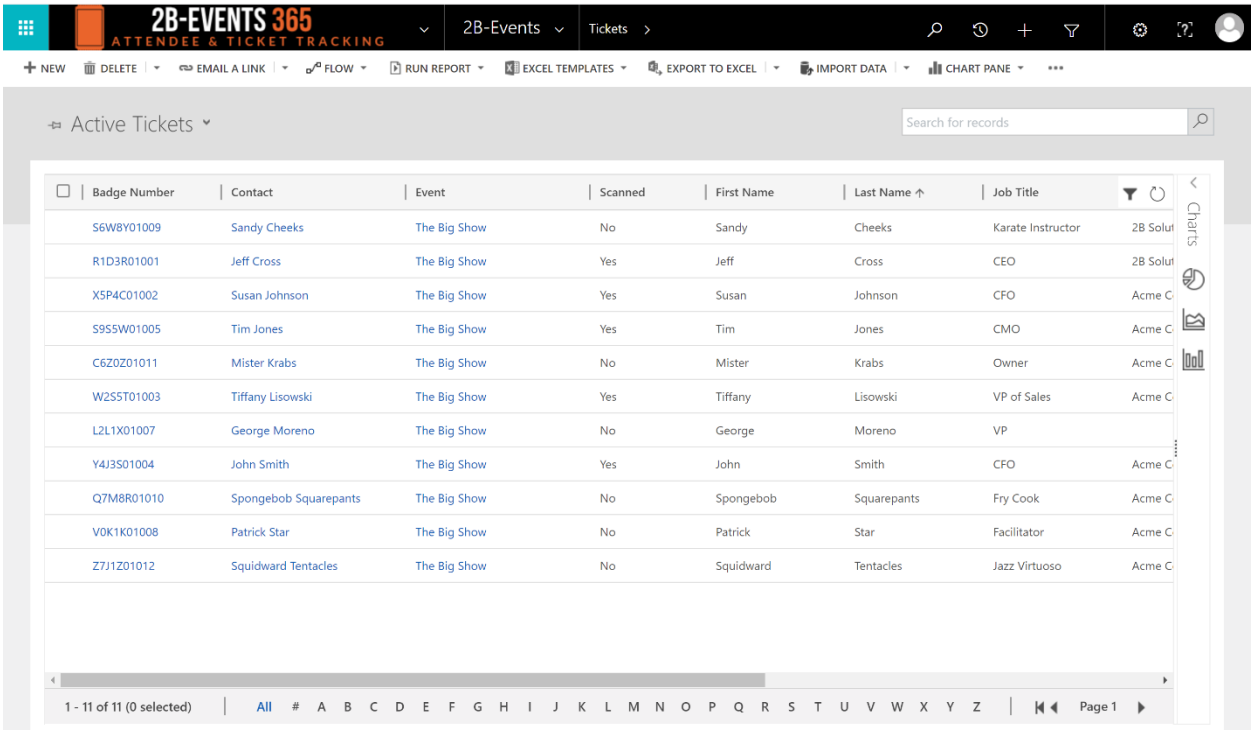
TICKETS

CREATING NEW TICKETS

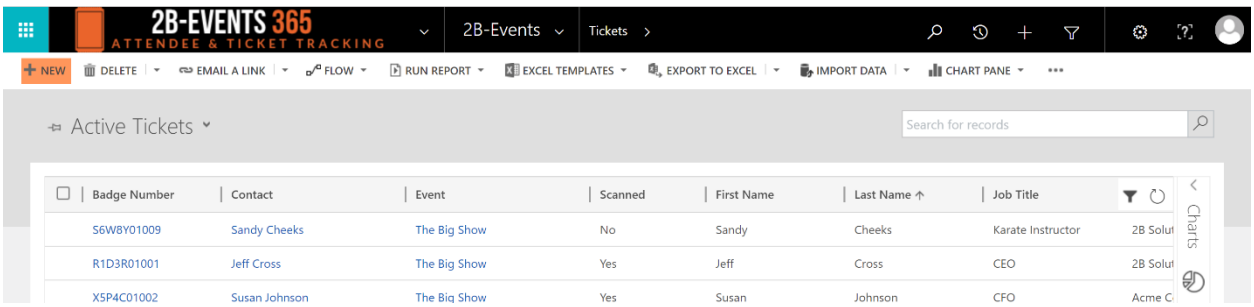
1. Navigate to 2B-EVENTS → Tickets



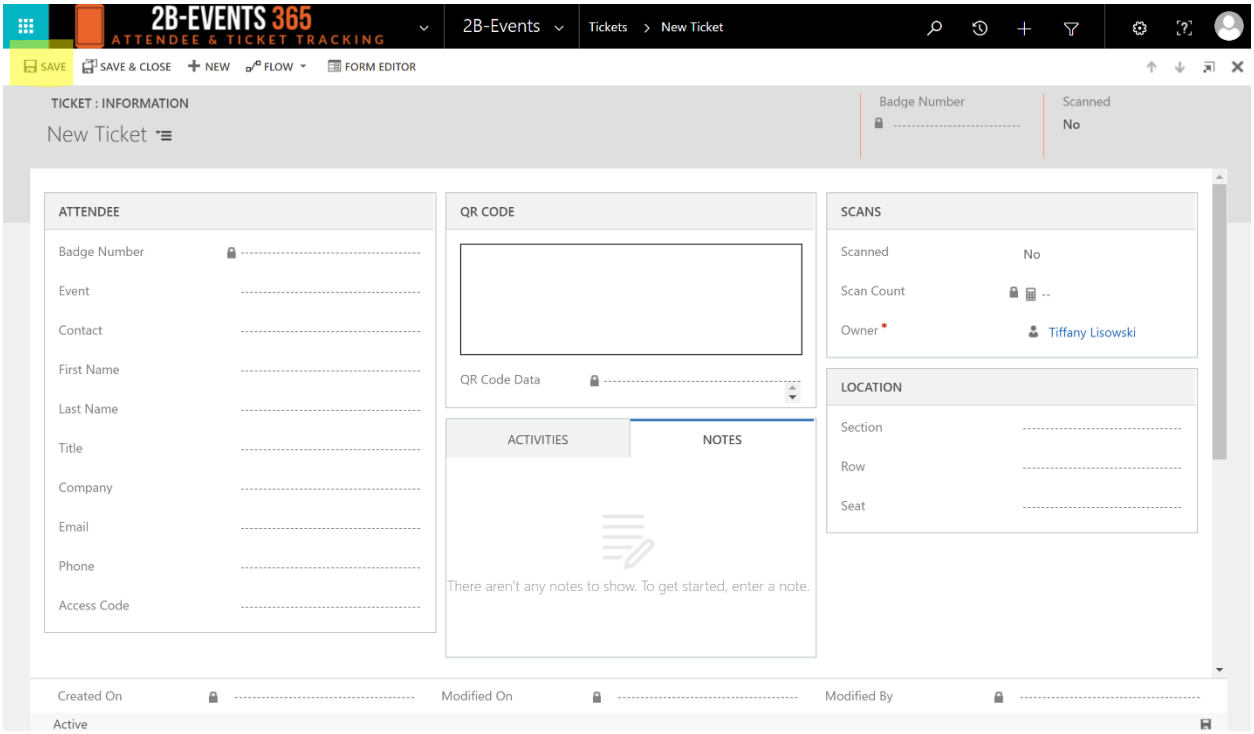
2. The default view shows Active Tickets. (See Create and Edit Views to learn more about creating new views.)



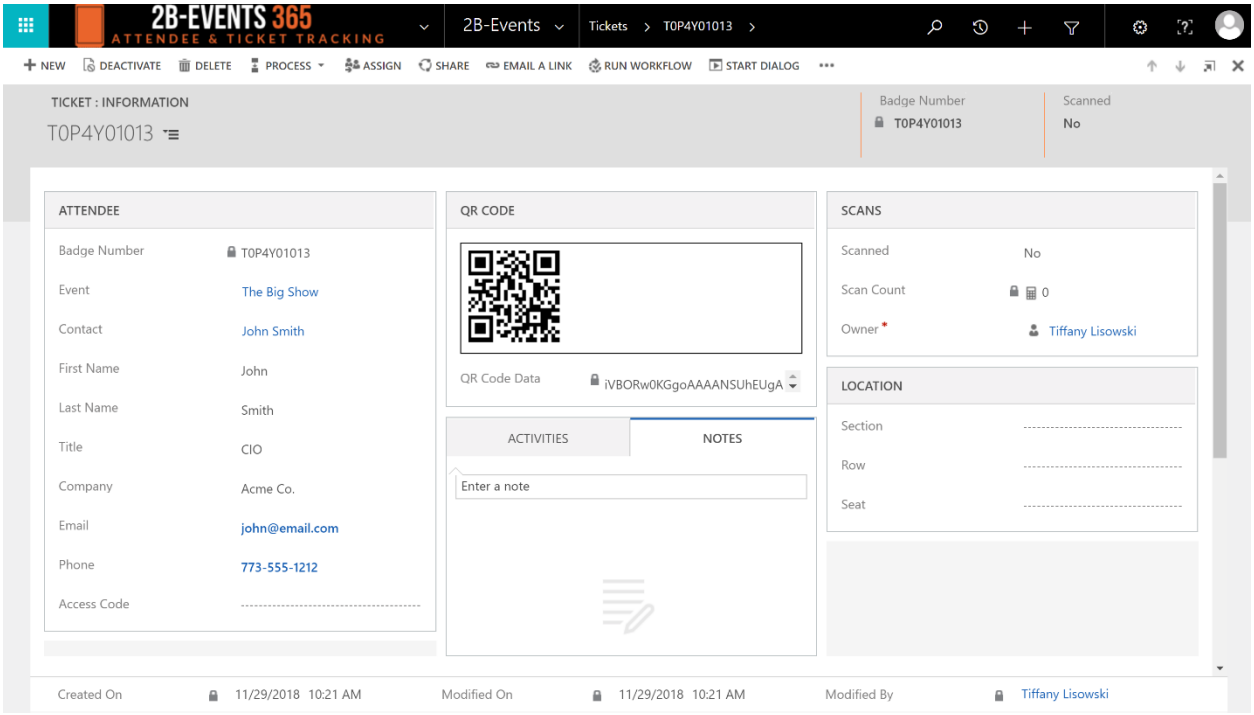
3. Click +NEW to create a new Ticket.



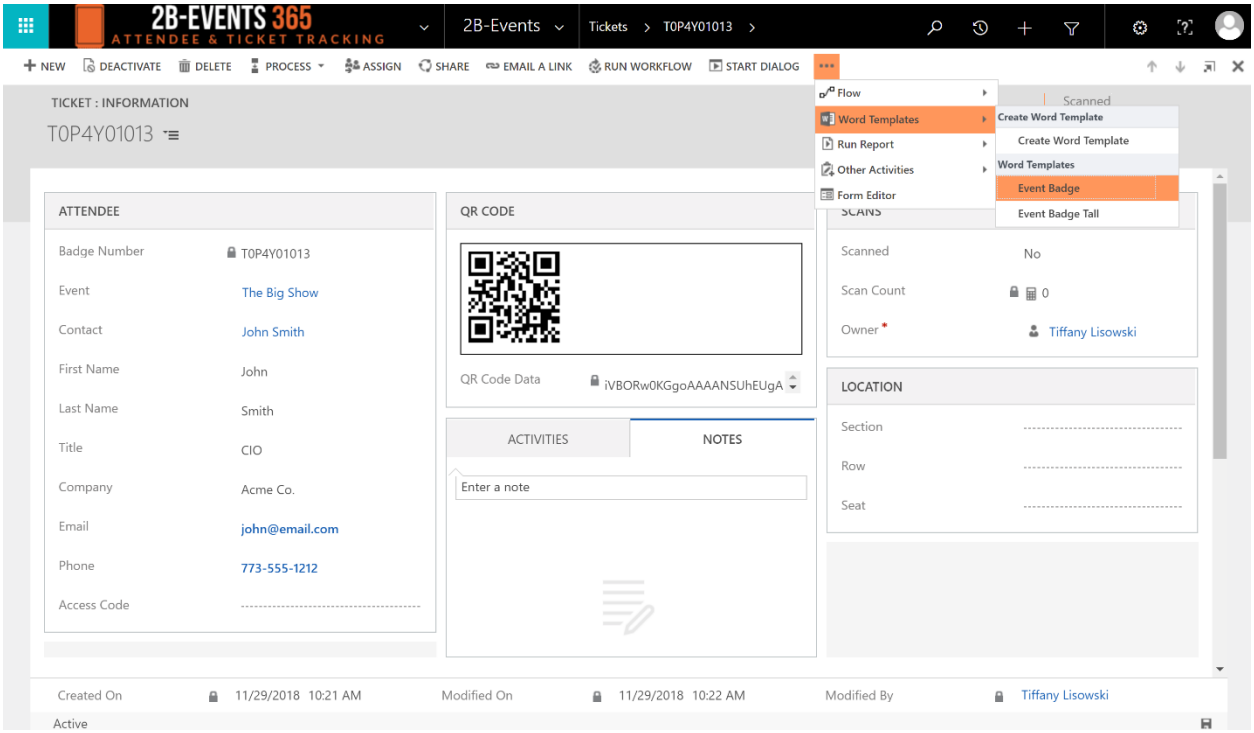
4. Enter Ticket information, including related Event and Contact information. Click SAVE.



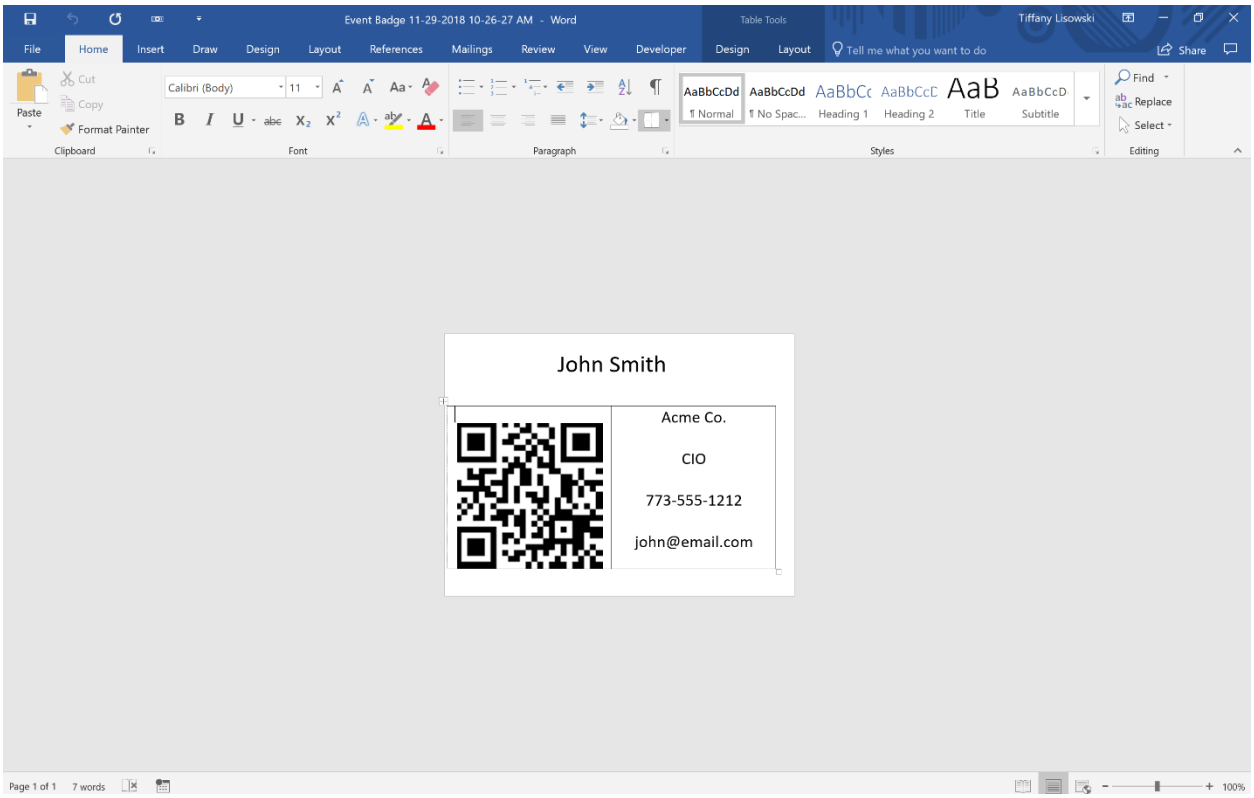
5. Once the form is saved, a unique Badge Number and QR Code embedded with the Badge Number will be created. (The screen may need to be refreshed before it will display the QR Code.)



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

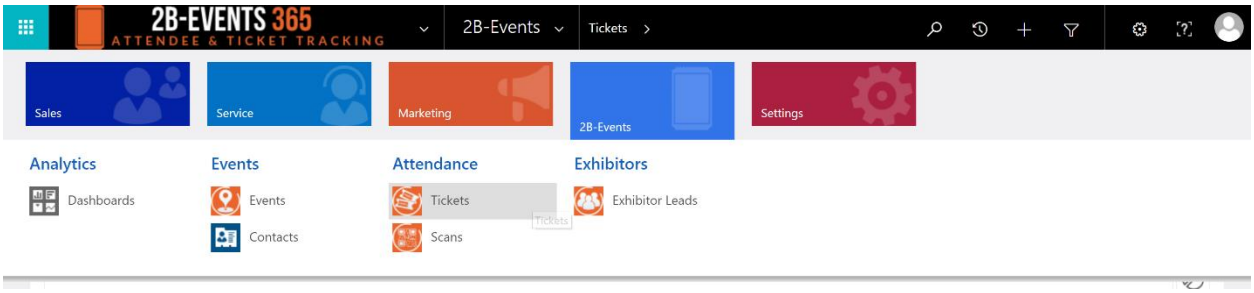


7. A customizable Word template containing the QR Code will be generated in Word. This template can be modified based on your requirements. The ticket can then be printed or attached to an email.

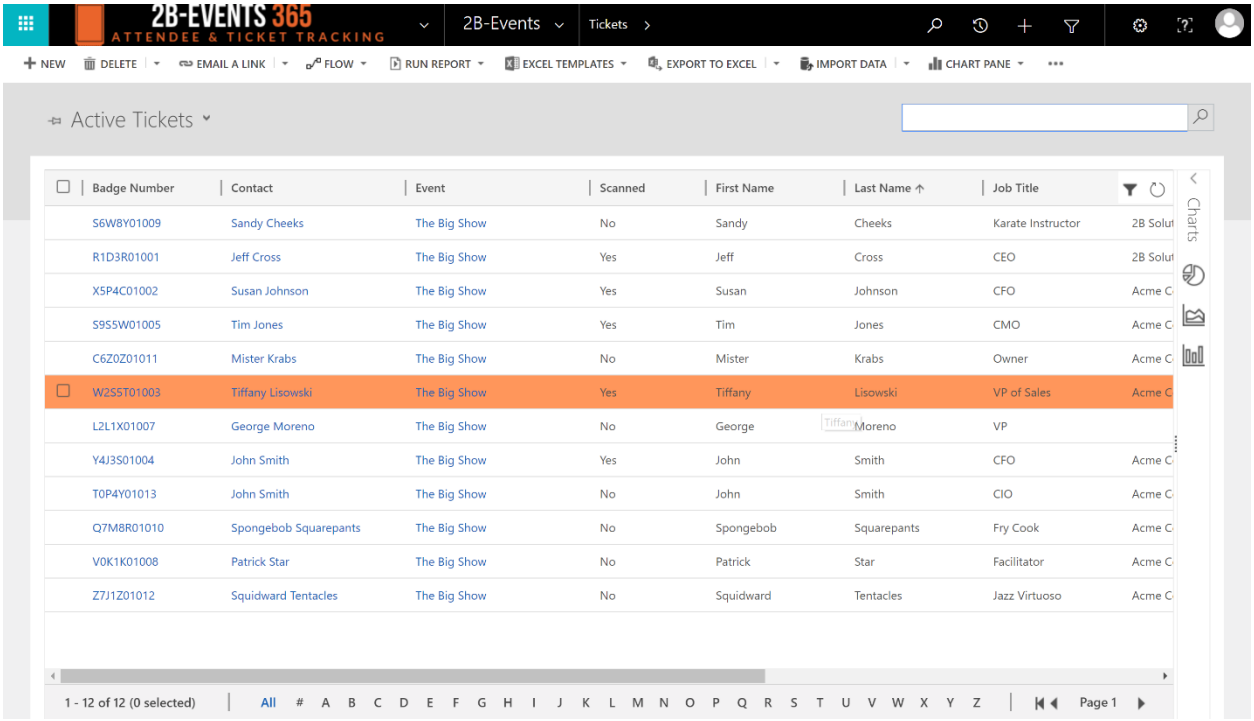


VIEW OR UPDATE EXISTING TICKETS

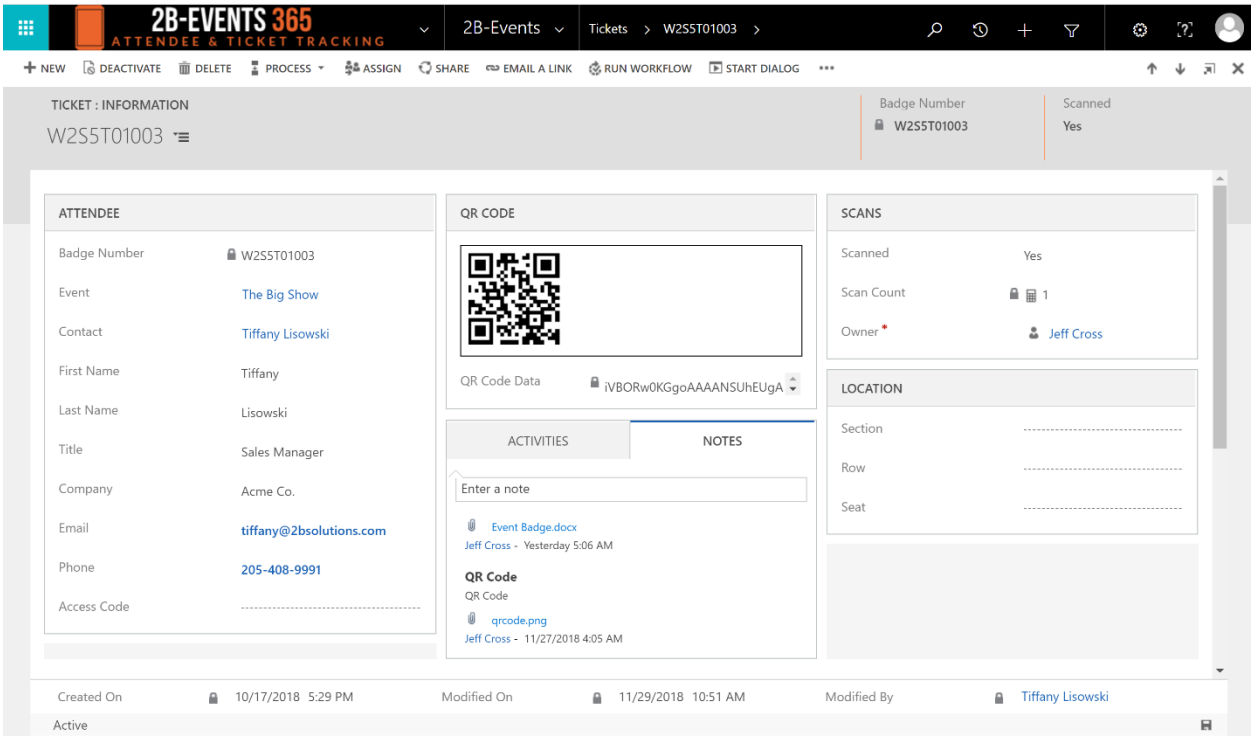
1. Navigate to 2B-EVENTS → Tickets



2. Double-click Ticket record.



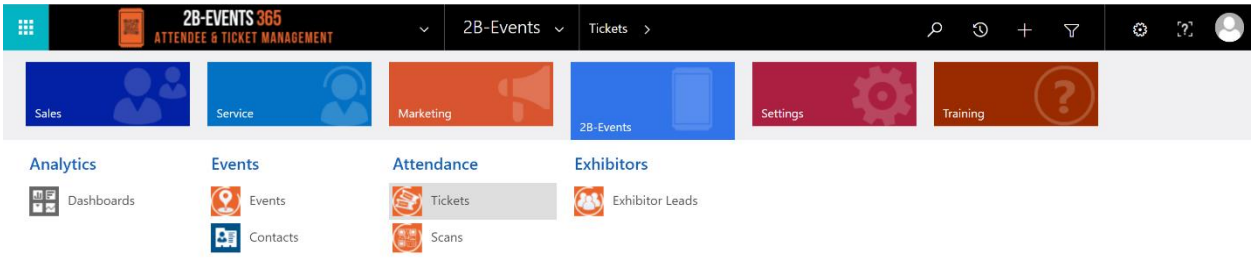
3. Changes can be made from the Ticket record.



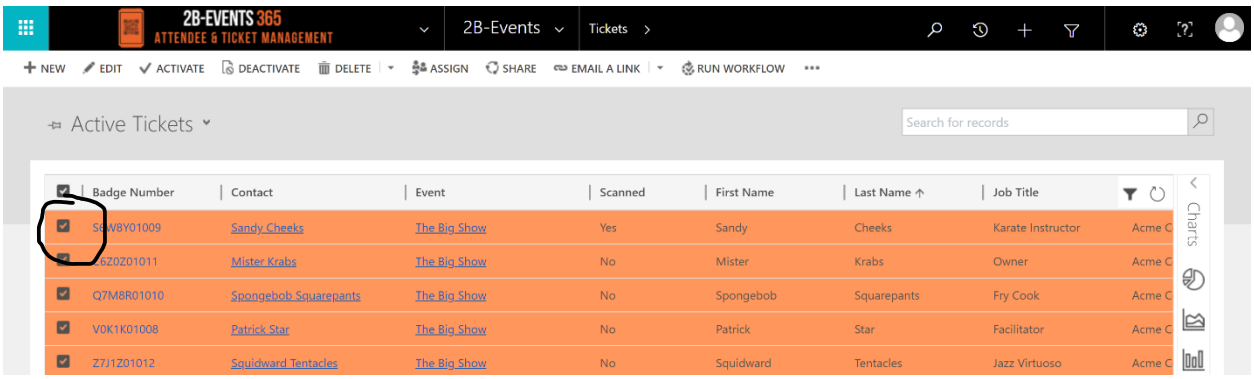
BULK PRINT ACTIVE TICKETS

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

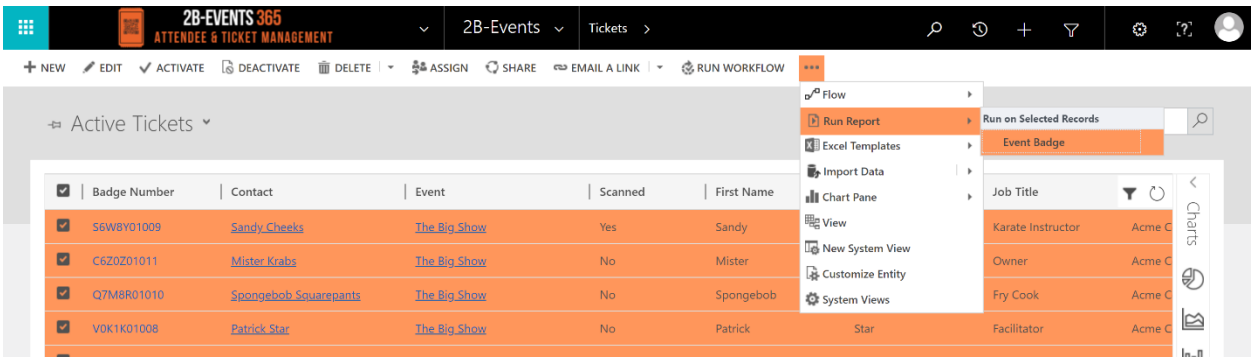
1. Navigate to 2B-Events → Attendance → Tickets



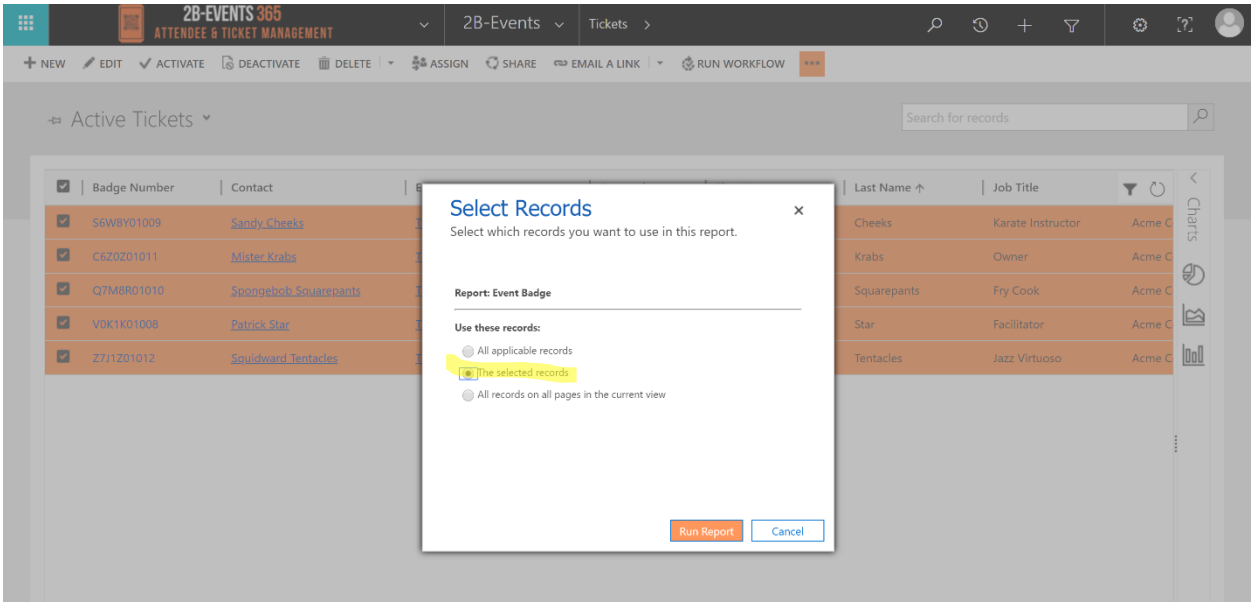
2. The default view shows all Active Tickets. Select the tickets to be printed by checking the box to the left of the record.



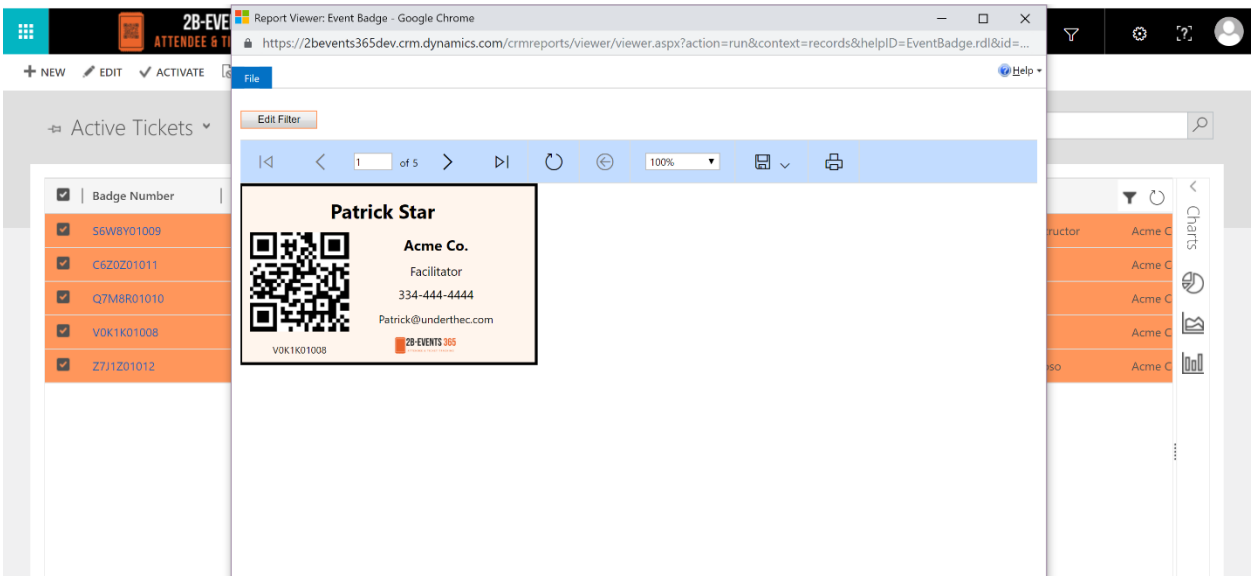
3. After selecting the tickets to be printed, navigate to … → Run Report → Event Badge.



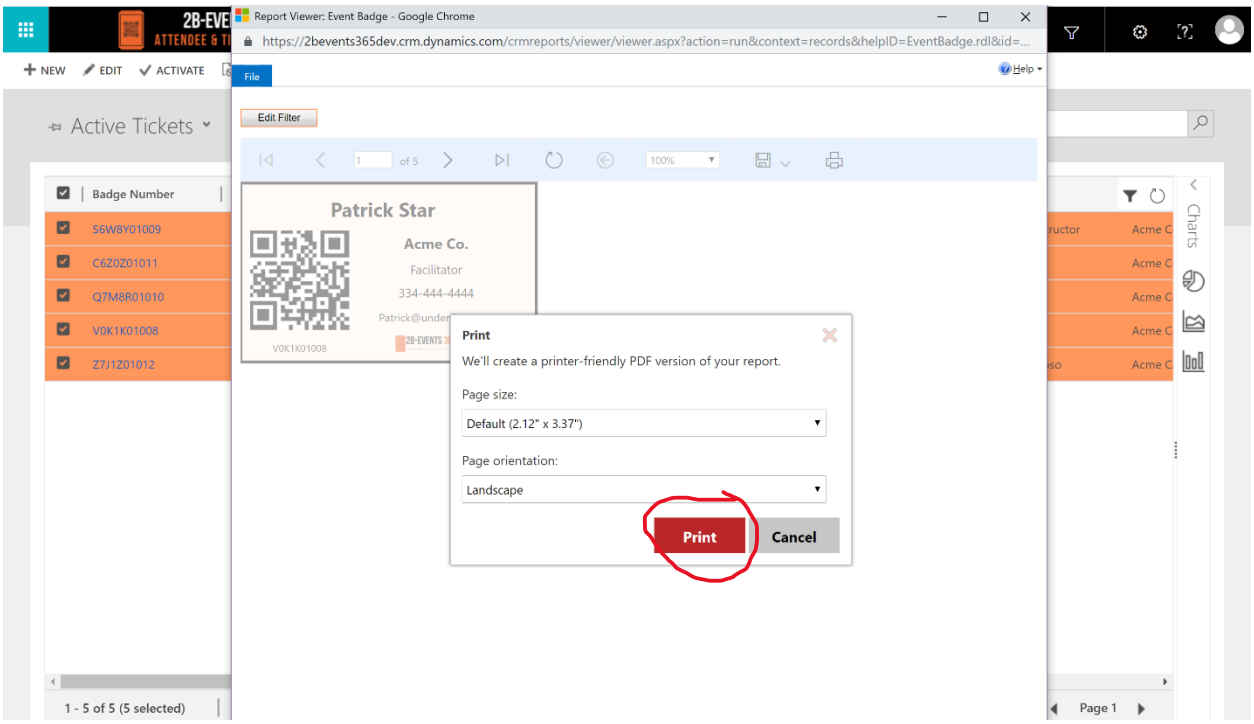
4. When the Select Records box appears, choose “The selected records” to print those records selected in the previous step.



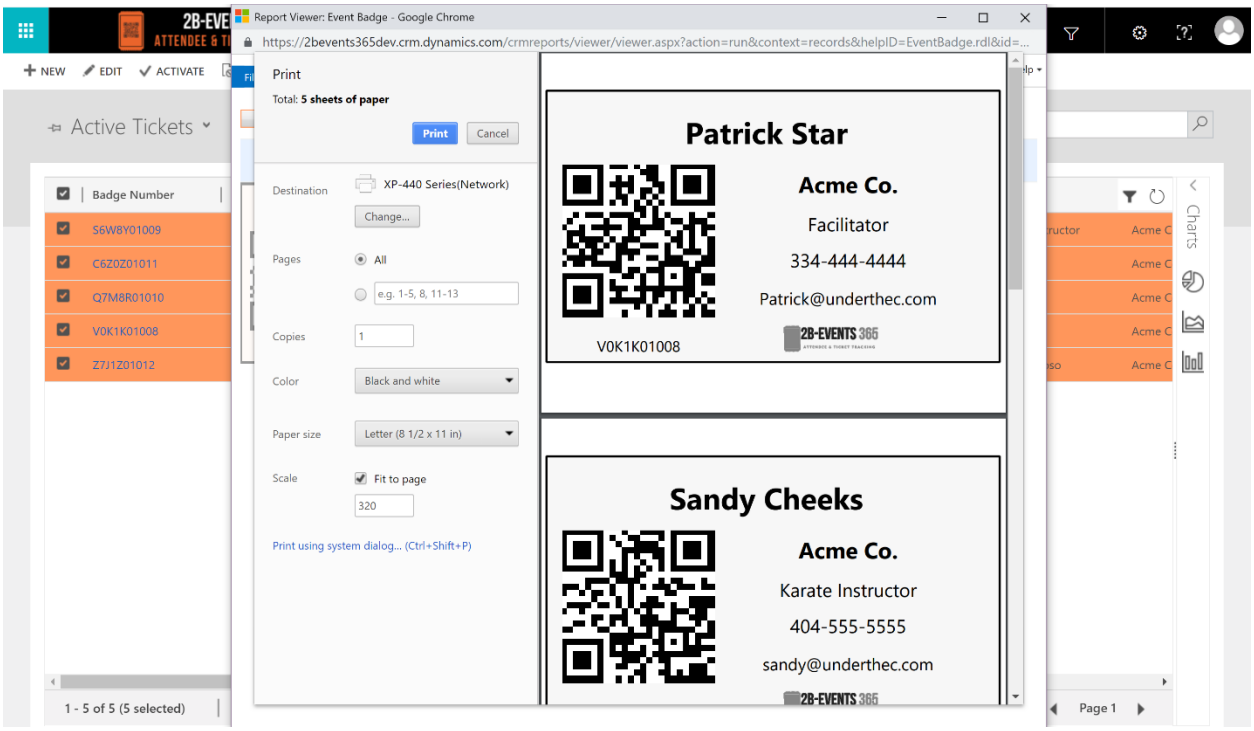
5. A ticket will be created for each of the selected records.



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.)



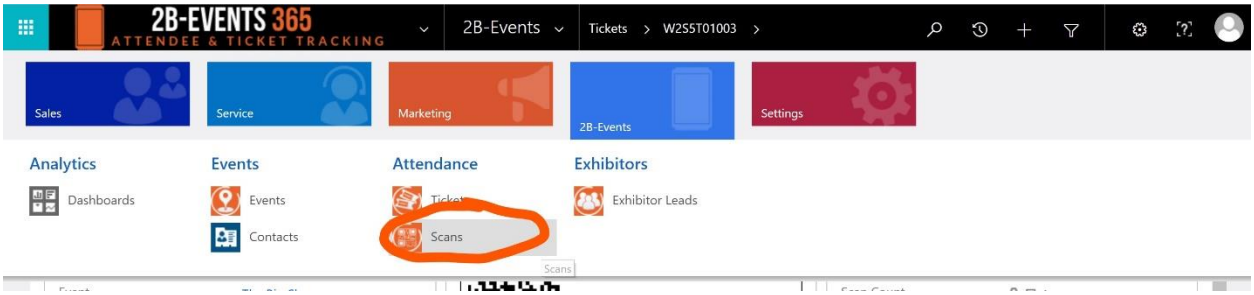
7. A PDF will be created containing tickets/badges for all selected records. Simply print the PDF.



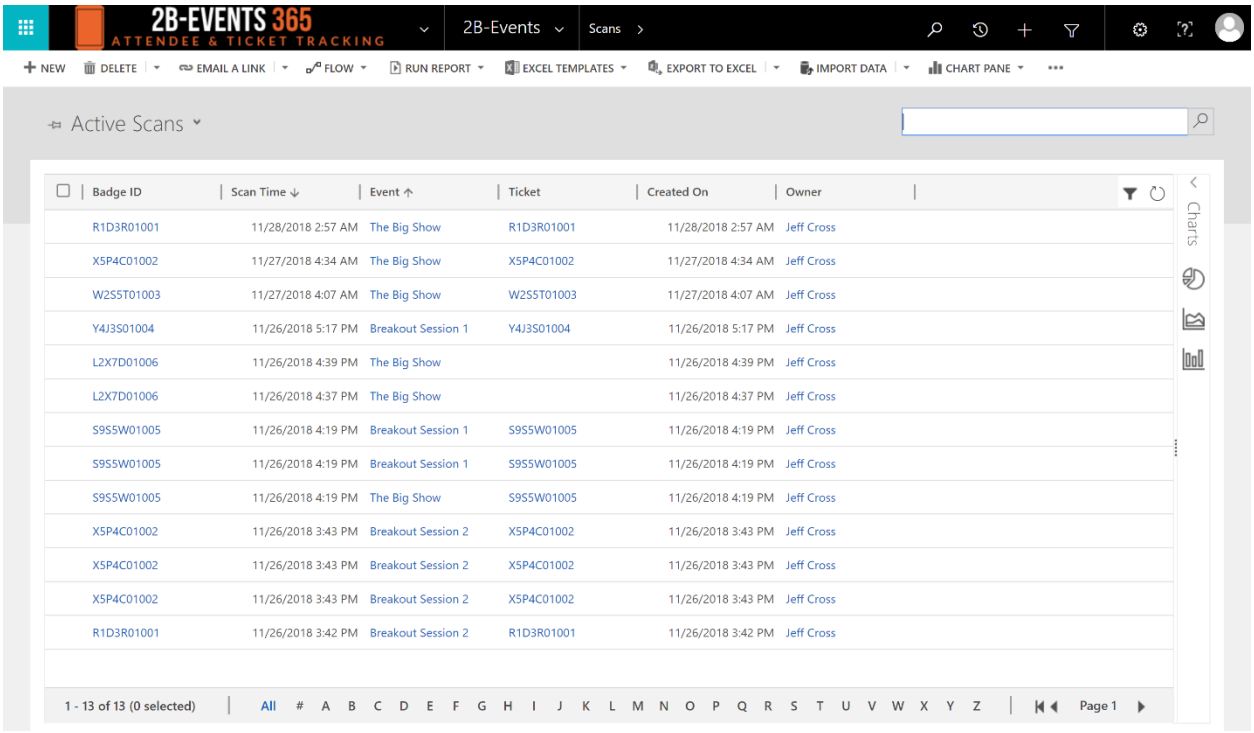
SCANS

VIEW TICKET SCAN INFORMATION

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



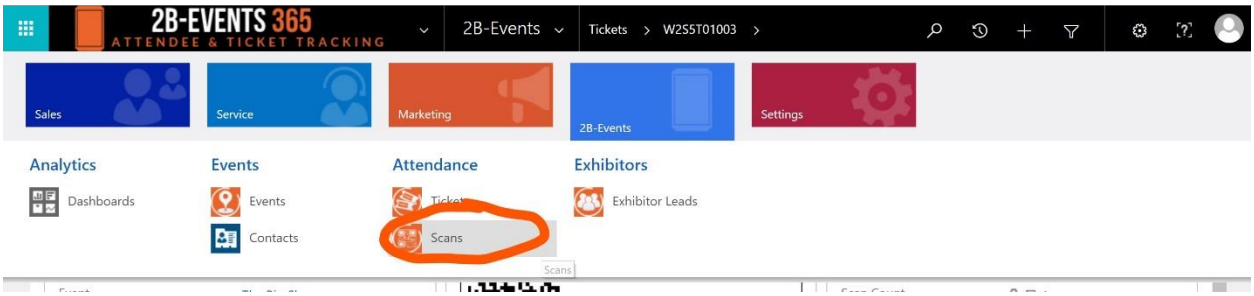
2. The default view shows all Active Scans. For more information on Views, see Create and Edit Views.



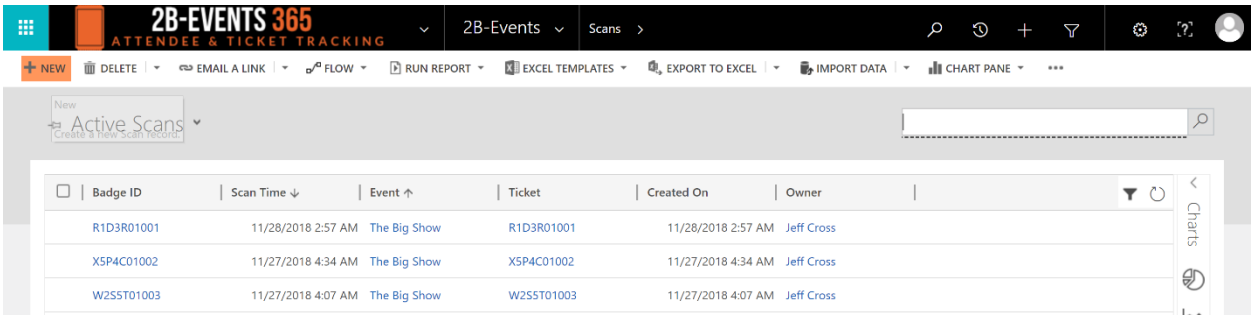
ENTER SCANS MANUALLY

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

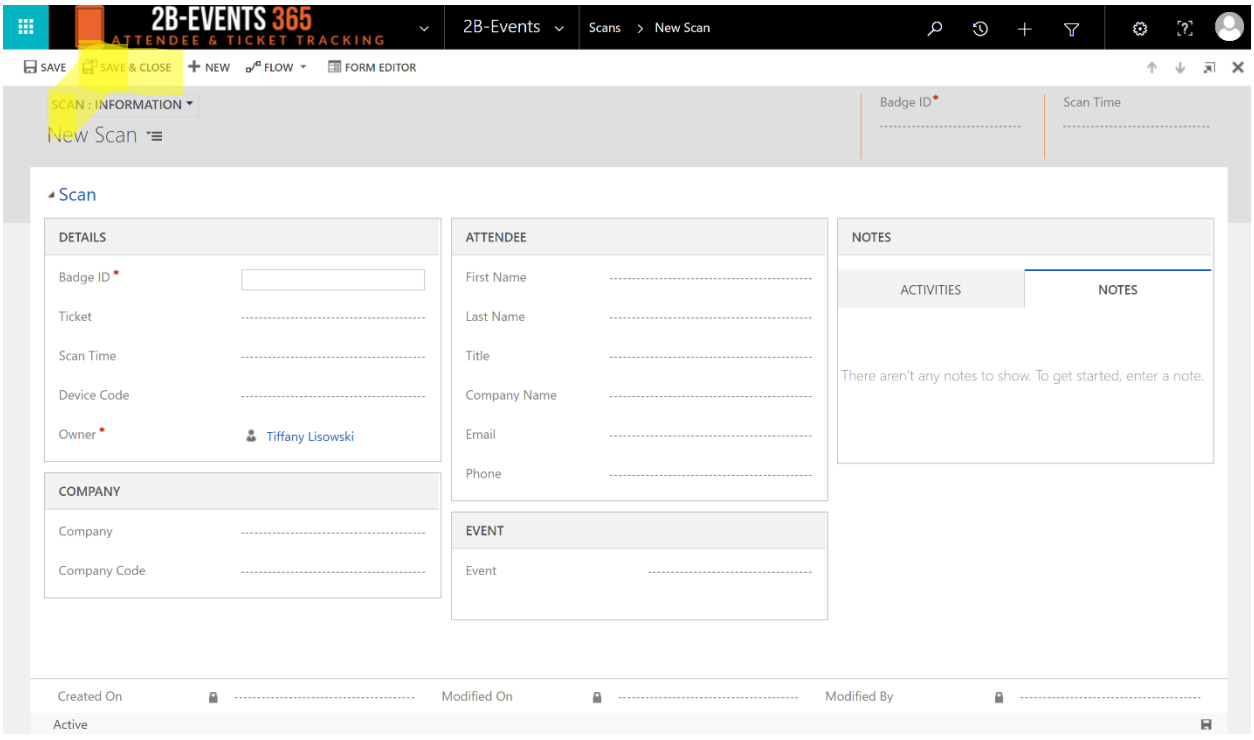
1. Navigate to 2B-EVENTS → Tickets → Scans



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



3. Enter Scan information and SAVE & CLOSE

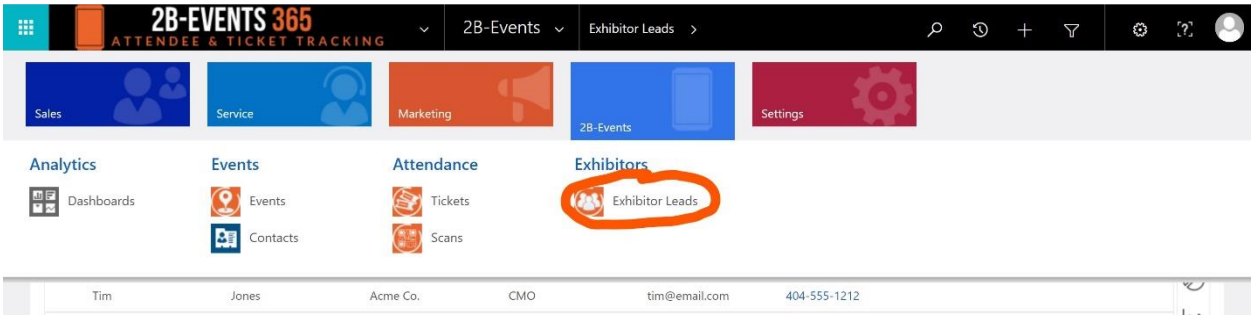


EXHIBITOR LEADS

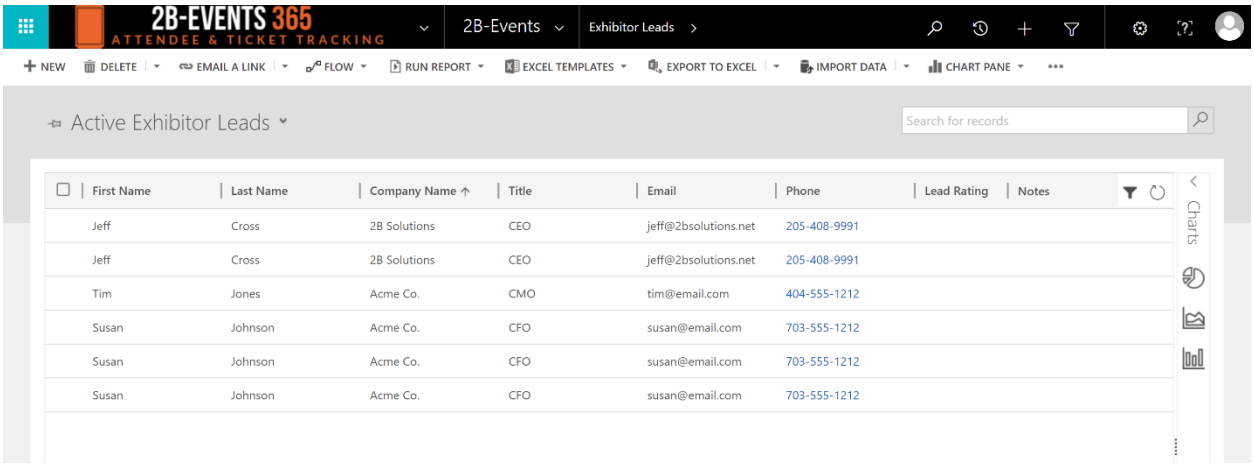
Exhibitors can capture lead information at events such as trade shows using the 2B-EVENTS mobile application for Exhibitors. See Navigating the Mobile Application for Exhibitors for instruction on its use.

VIEW EXHIBITOR LEADS

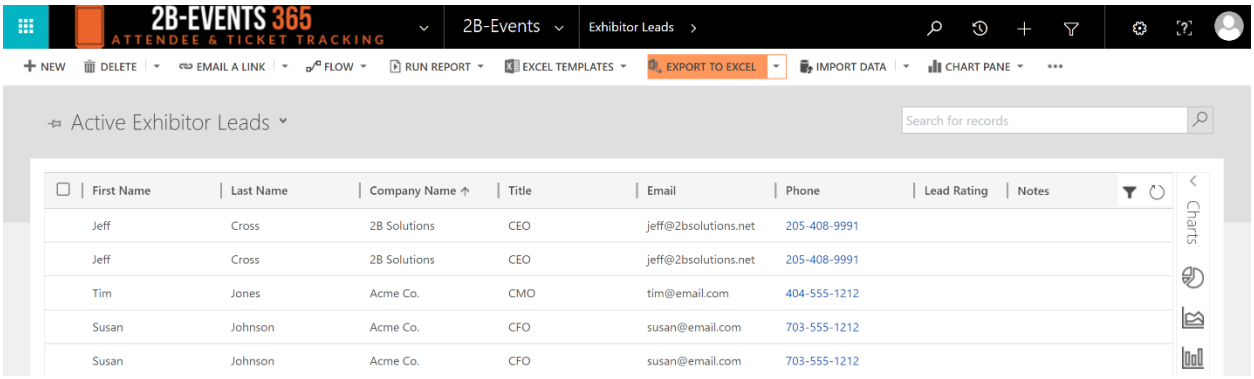
1. Exhibitor Lead information is captured within 2B-EVENTS 365 and can be viewed by navigating to 2B-EVENTS 365 → Exhibitors → Exhibitor Leads



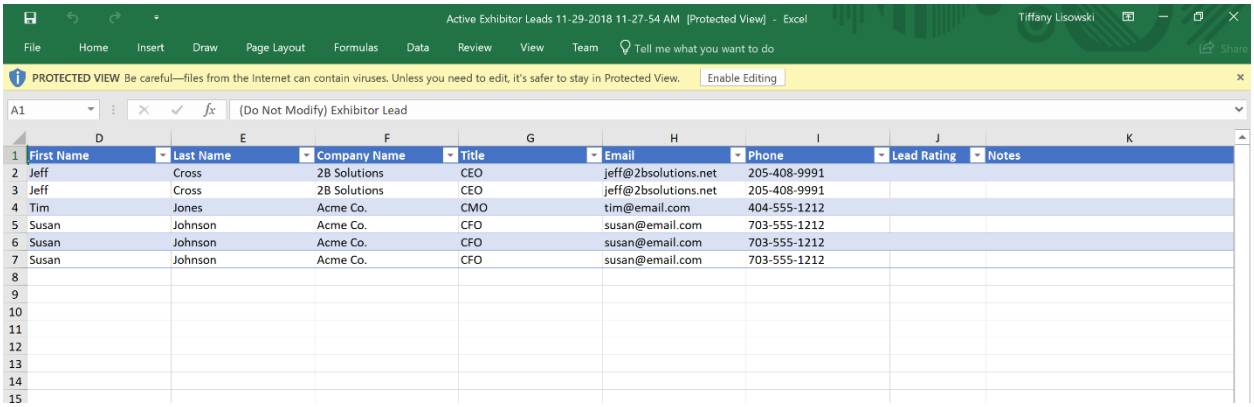
2. The default view is Active Leads. This view shows all active Exhibitor Leads. For more information on Views, see Create and Edit Views.



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



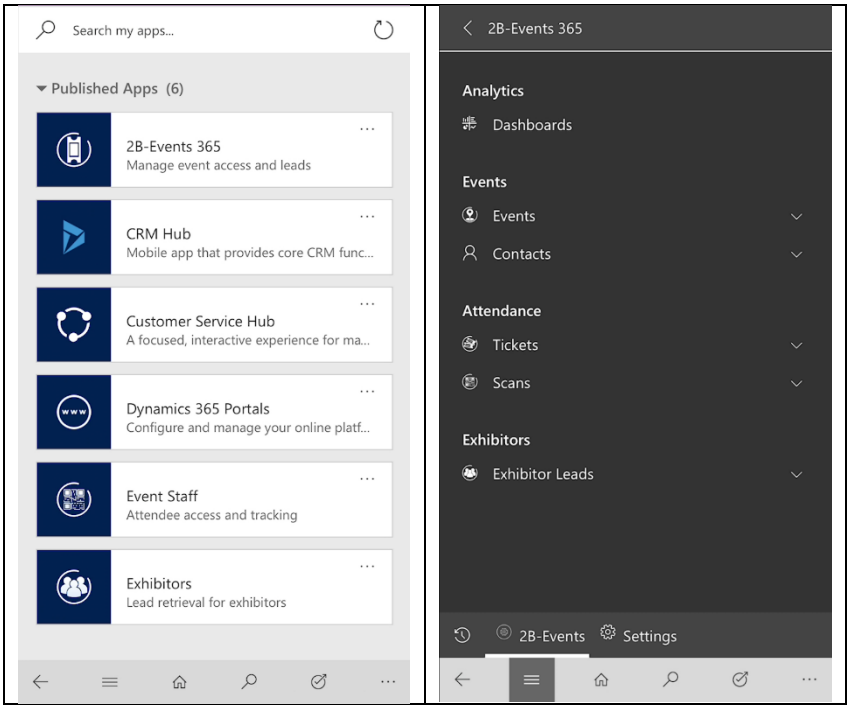
4. An Excel spreadsheet will be created.



NAVIGATING THE 2B-EVENTS 365 MOBILE APPLICATION FOR ADMINISTRATORS

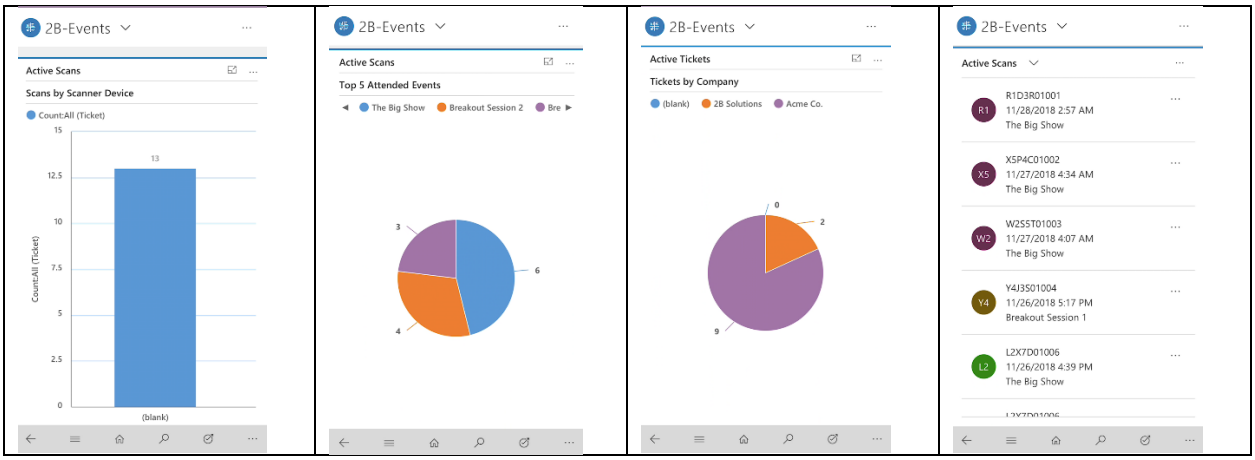
The mobile application for 2B-EVENTS 365 Administrators shows most of the same information available in the core application. This information includes Dashboards, Events, Tickets, Scans and Exhibitor info.

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



DASHBOARDS

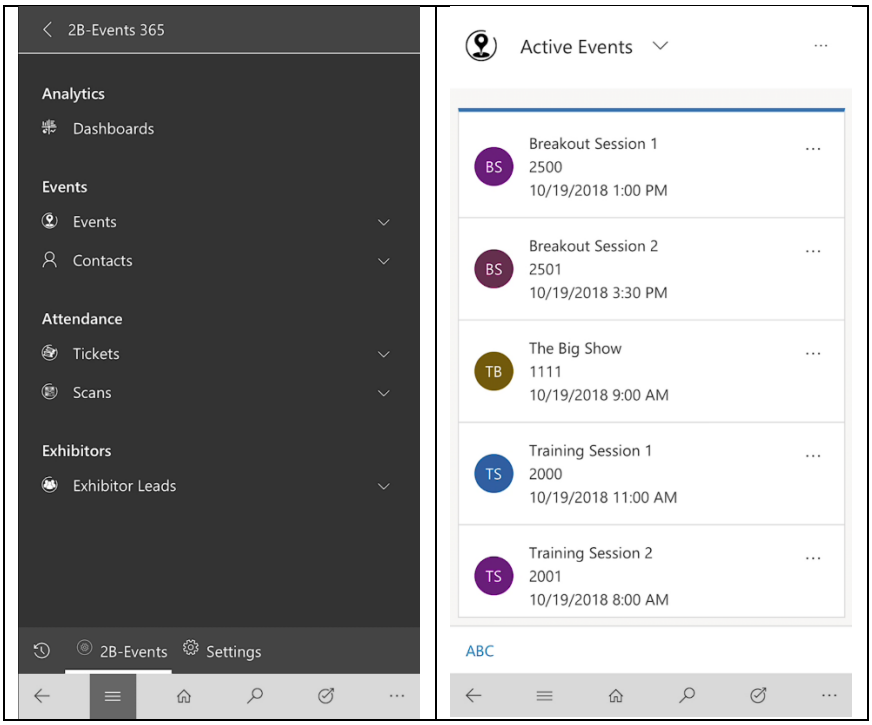
1. Under Dashboards, the user can see analytics relating to Scans by Device, Active Scans, Tickets by Company and Active Scans by scrolling down the page.



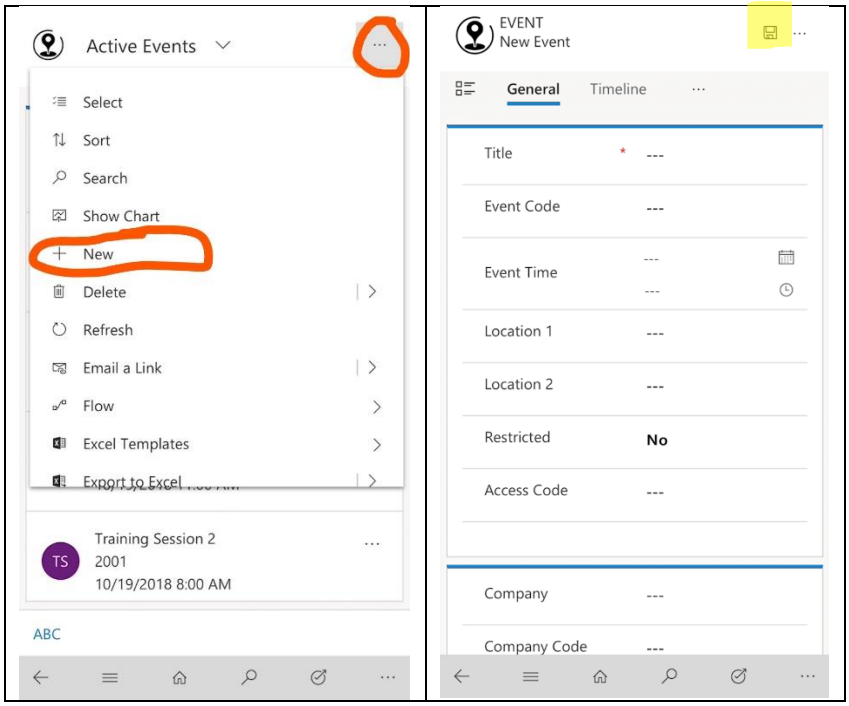
2. While these are the out-of-the-box Dashboards, new dashboards can be created. See Create and Edit Dashboards and/or Dashboard Views in Dynamics 365 for Phone and Tablets for more information.

EVENTS

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

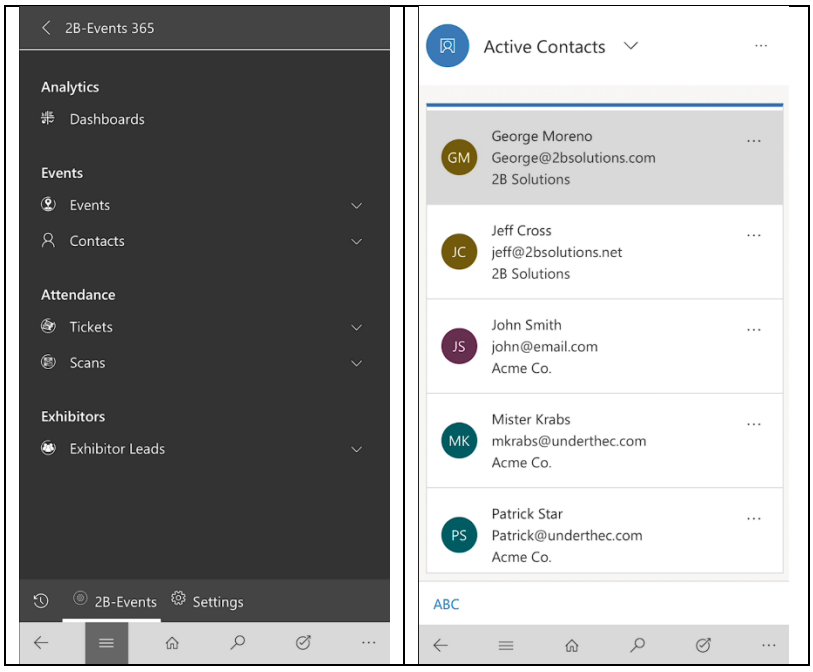


2. A new Event can be added by pressing … and choosing +NEW. A blank Event form will appear. Enter information for Event and Save.

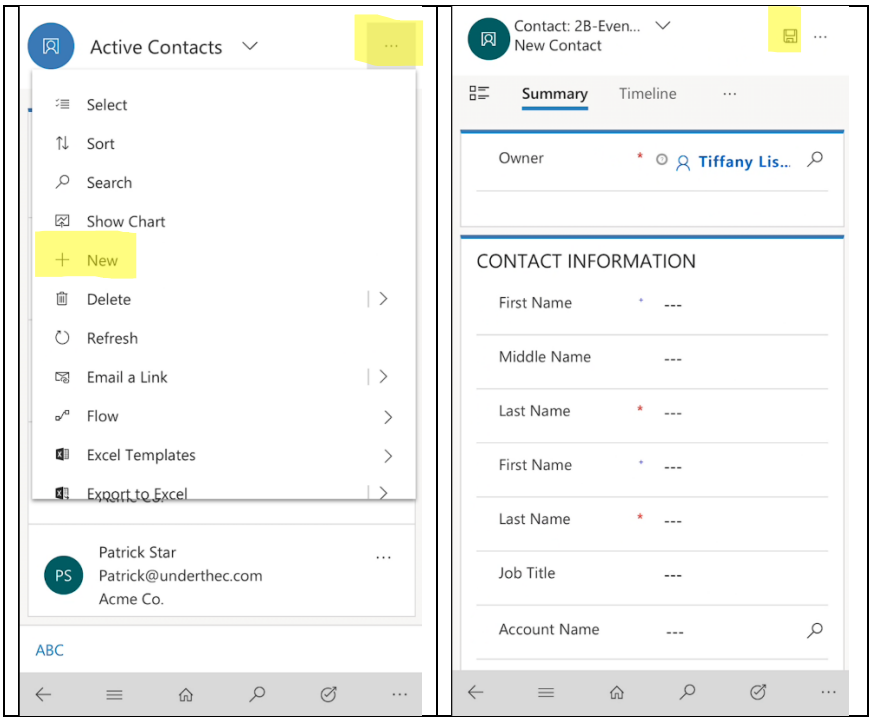


CONTACTS

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

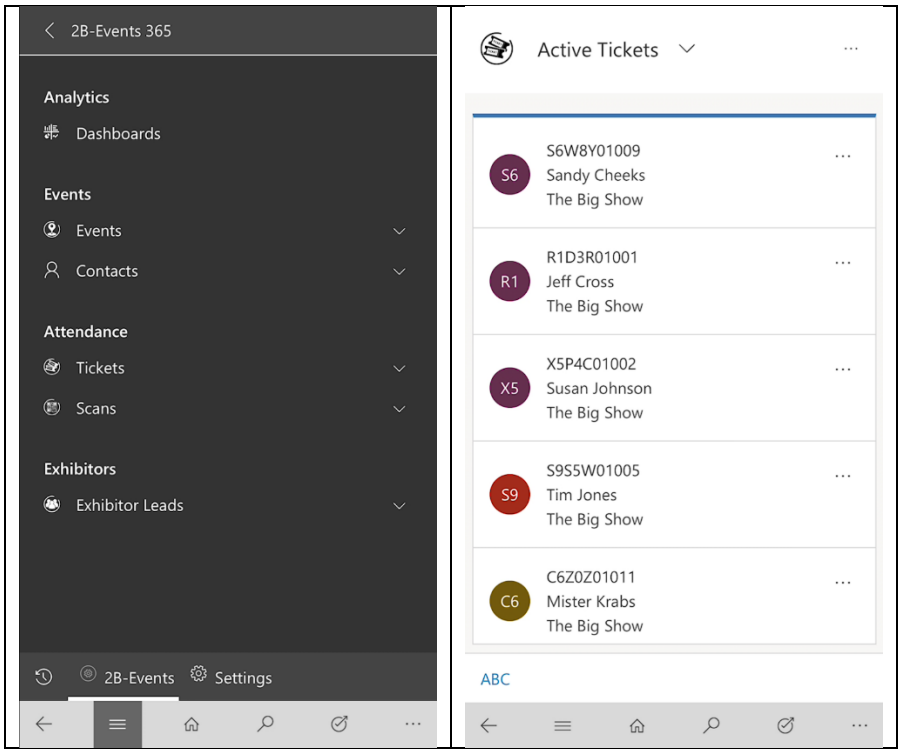


3. To add a new Contact, press … and choose +NEW. A blank Event form will appear. Enter information for Event and Save.

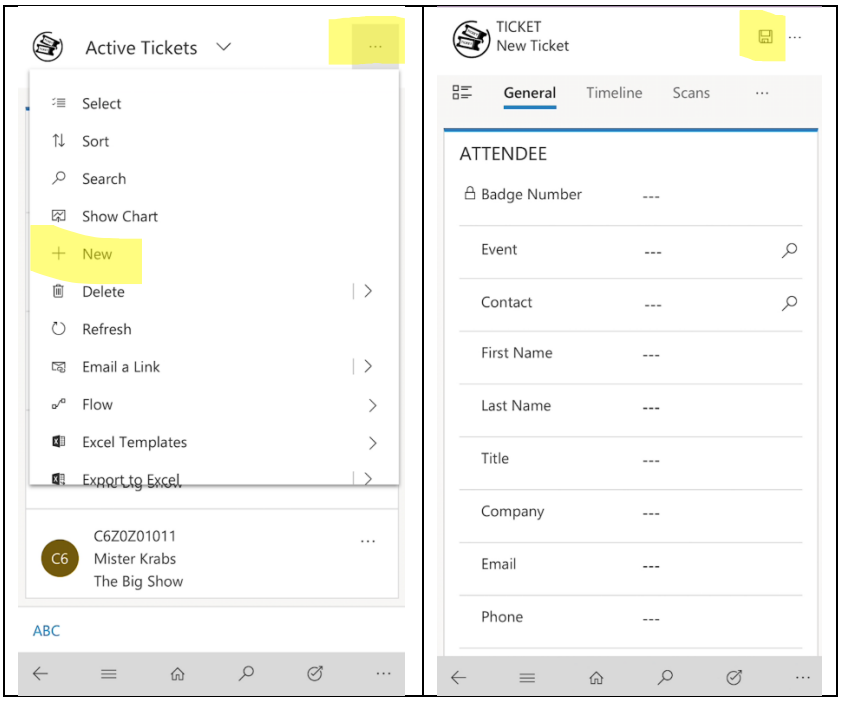


TICKETS

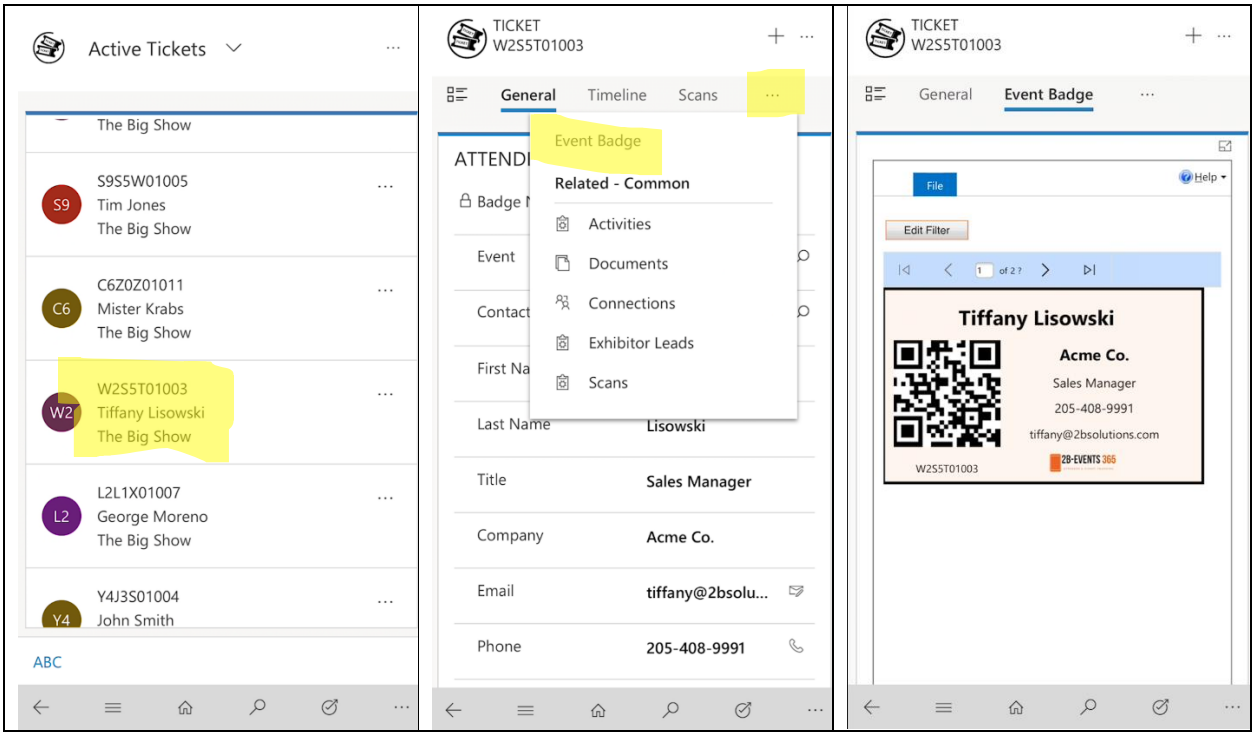
1. From the home screen, select Tickets to see a list of Active Tickets.



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.

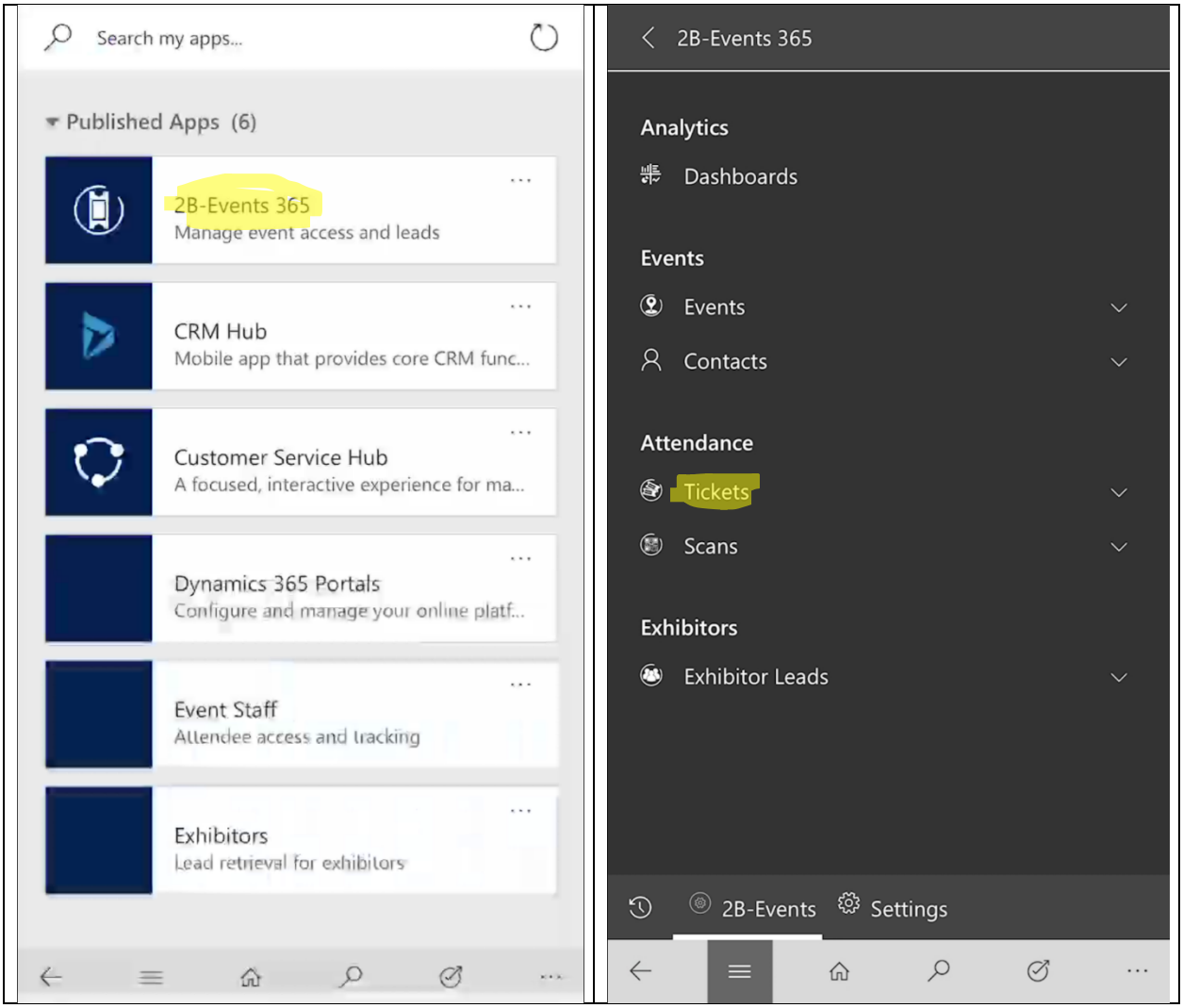


4. If on-site badge or ticket printing is required, please see Mobile Badge Printing.

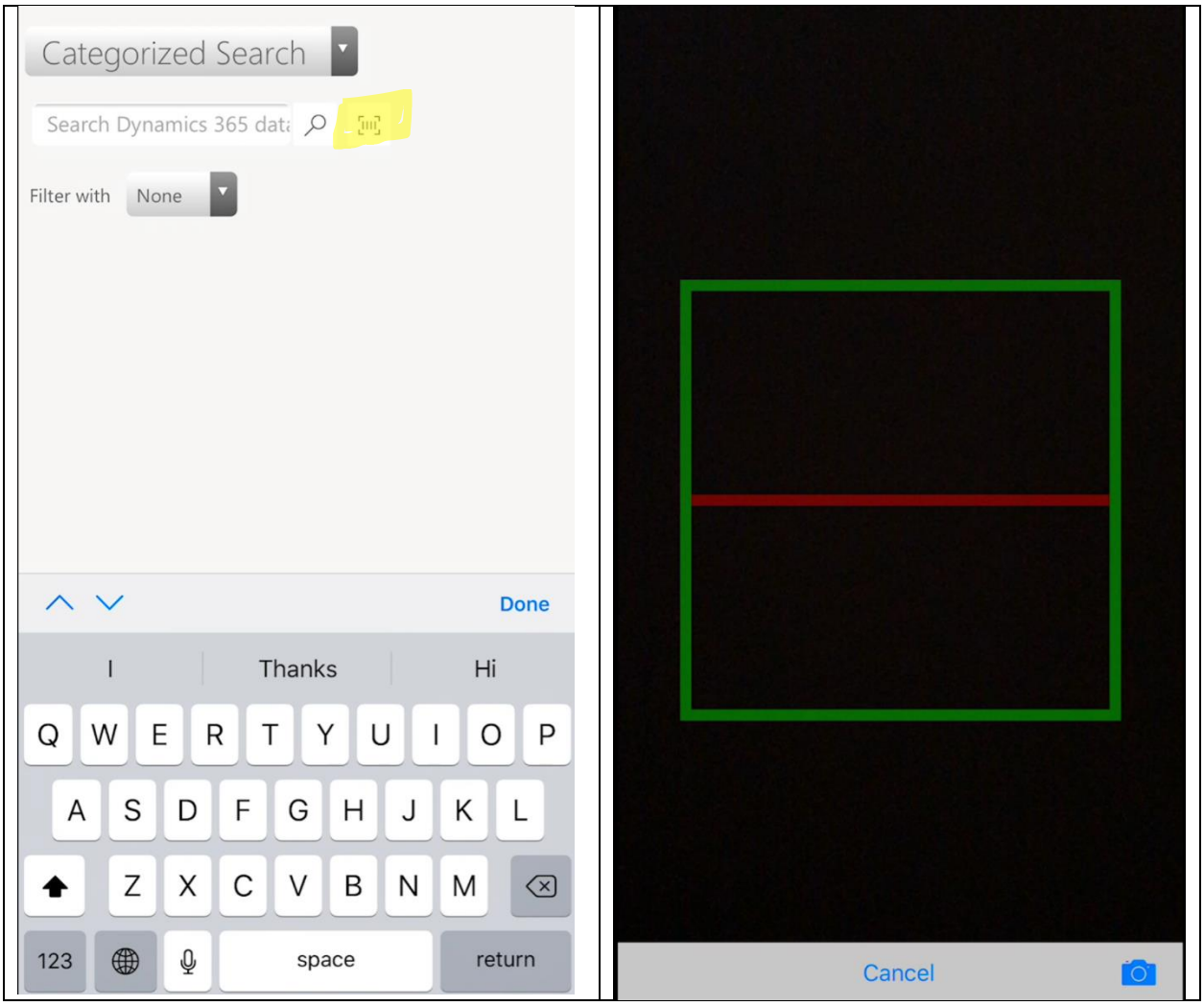
MOBILE TICKET/BADGE PRINTING

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

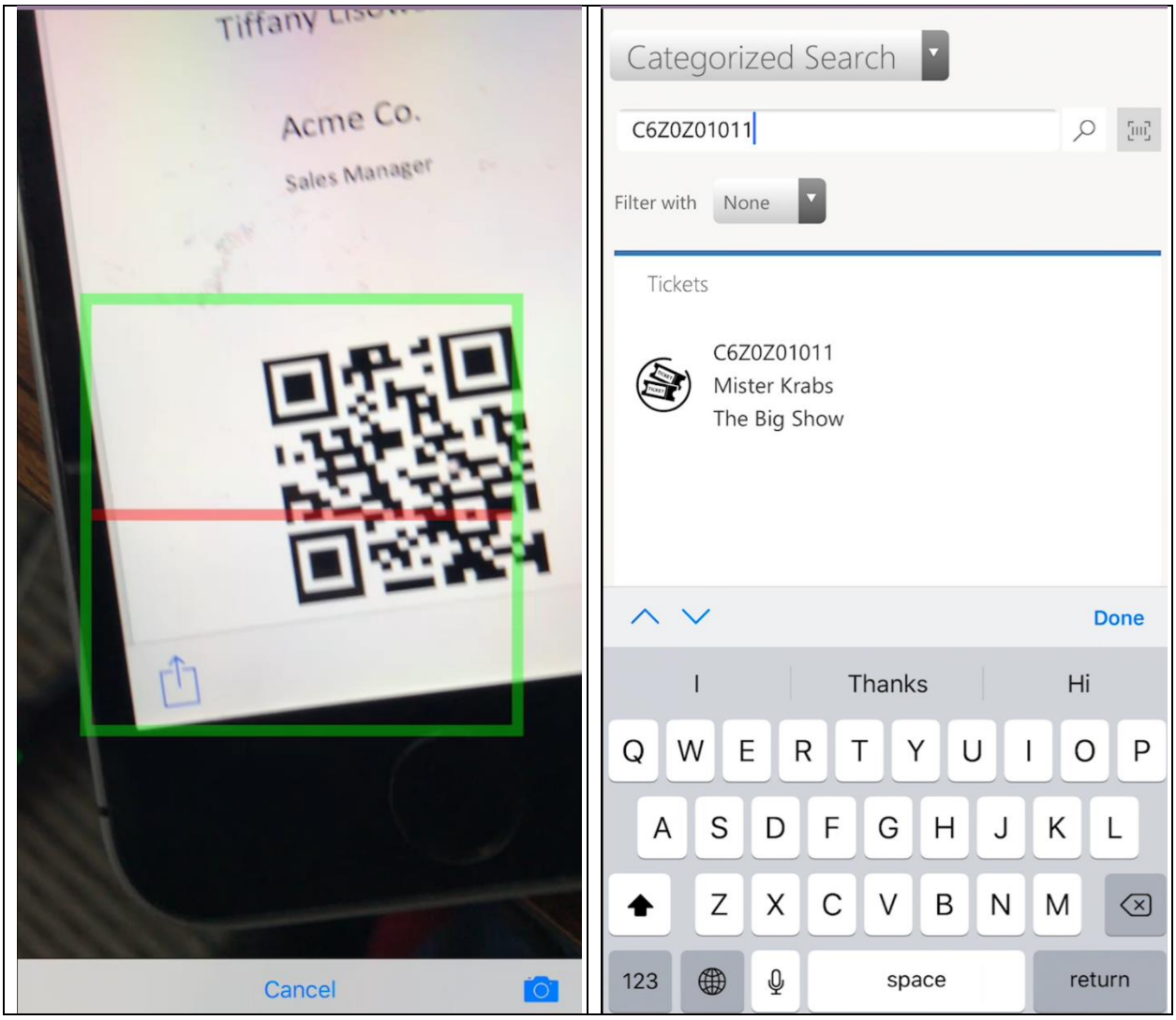
1. Log into your Dynamics 365 Mobile App. Navigate to 2B-Events 365 then Tickets.



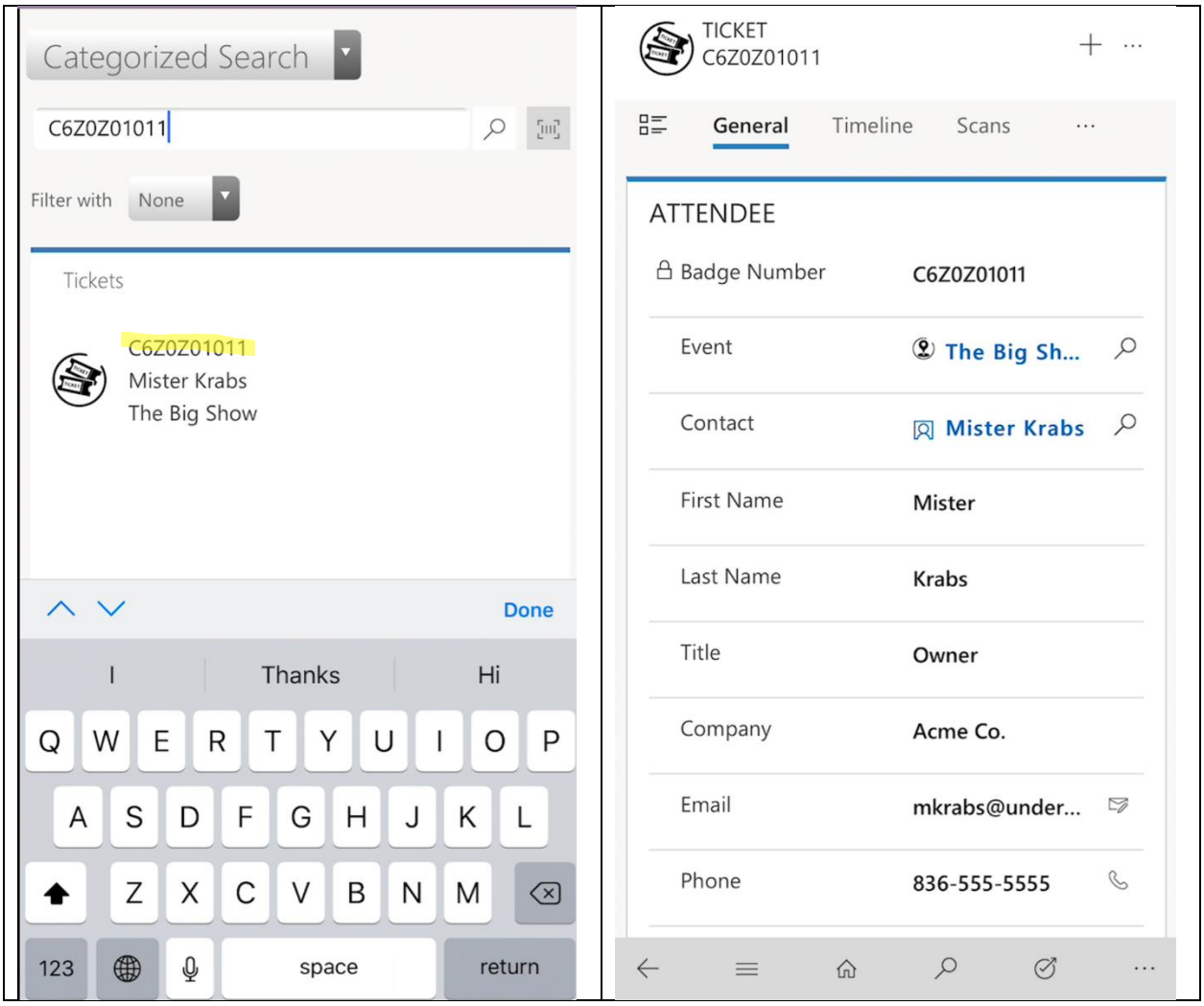
2. The following screen will appear. Click on the scanner button to open camera for ticket scanning.



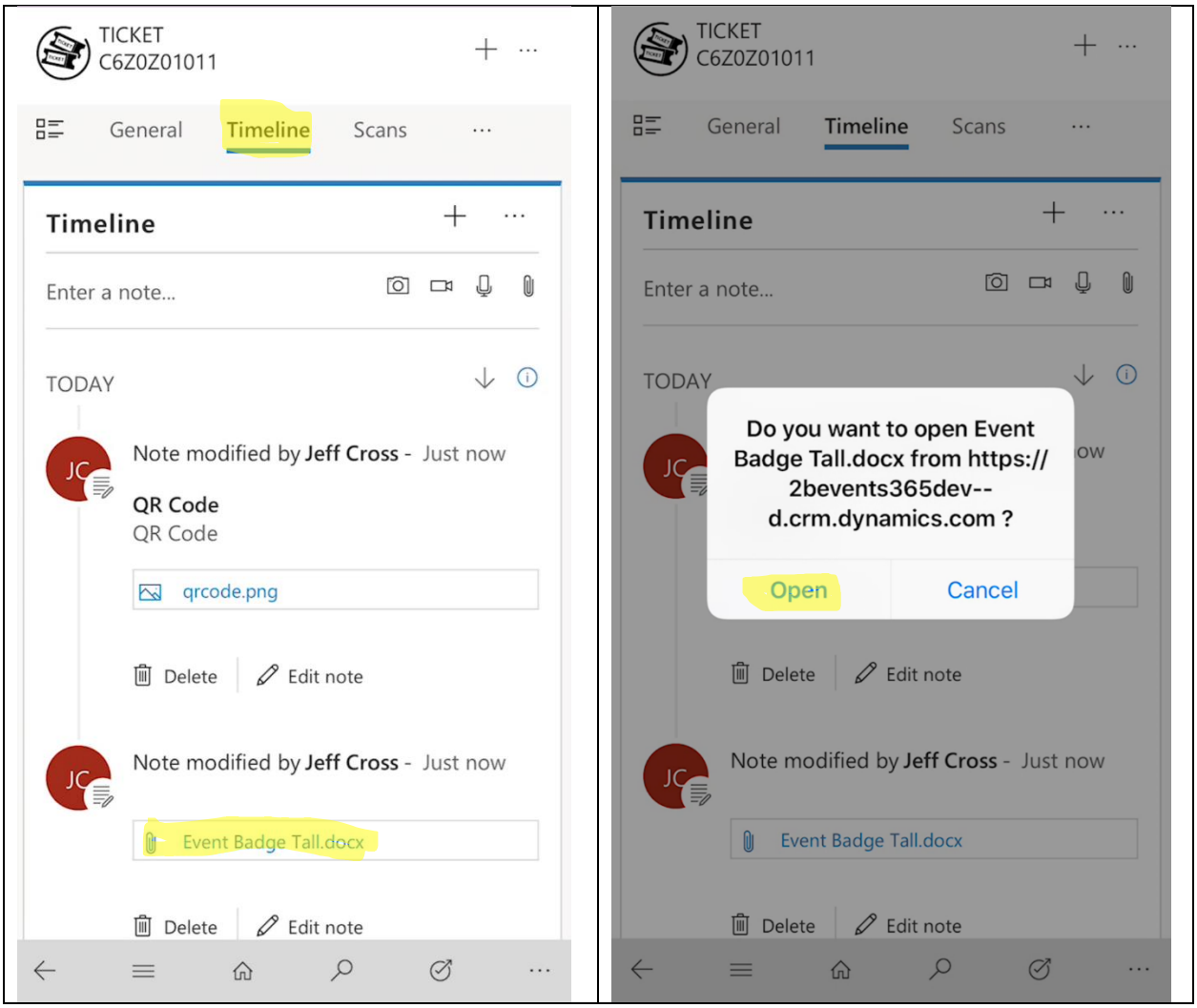
3. Scan the QR Code on the ticket to bring up the ticket record.



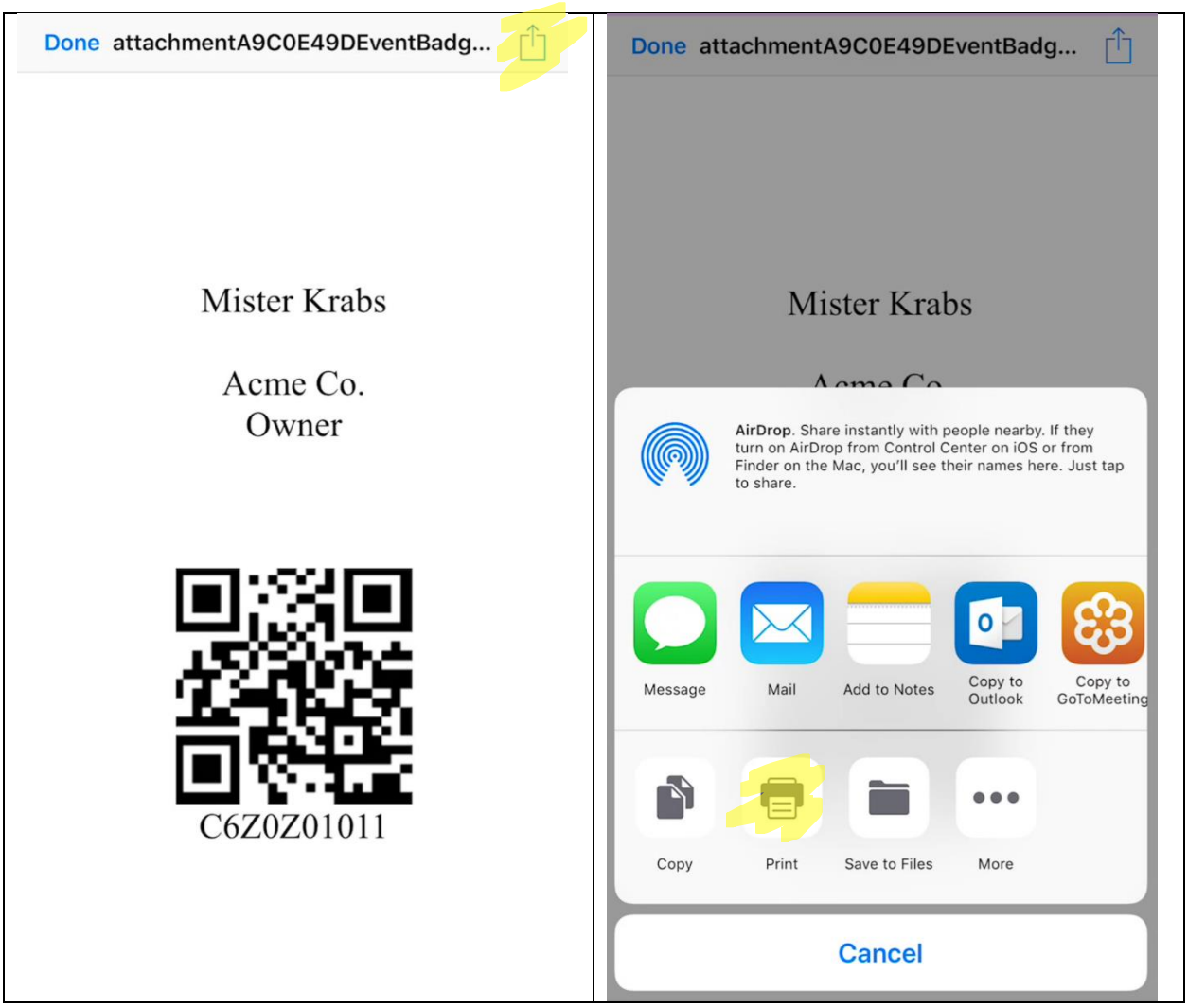
4. Click on the ticket record to open.



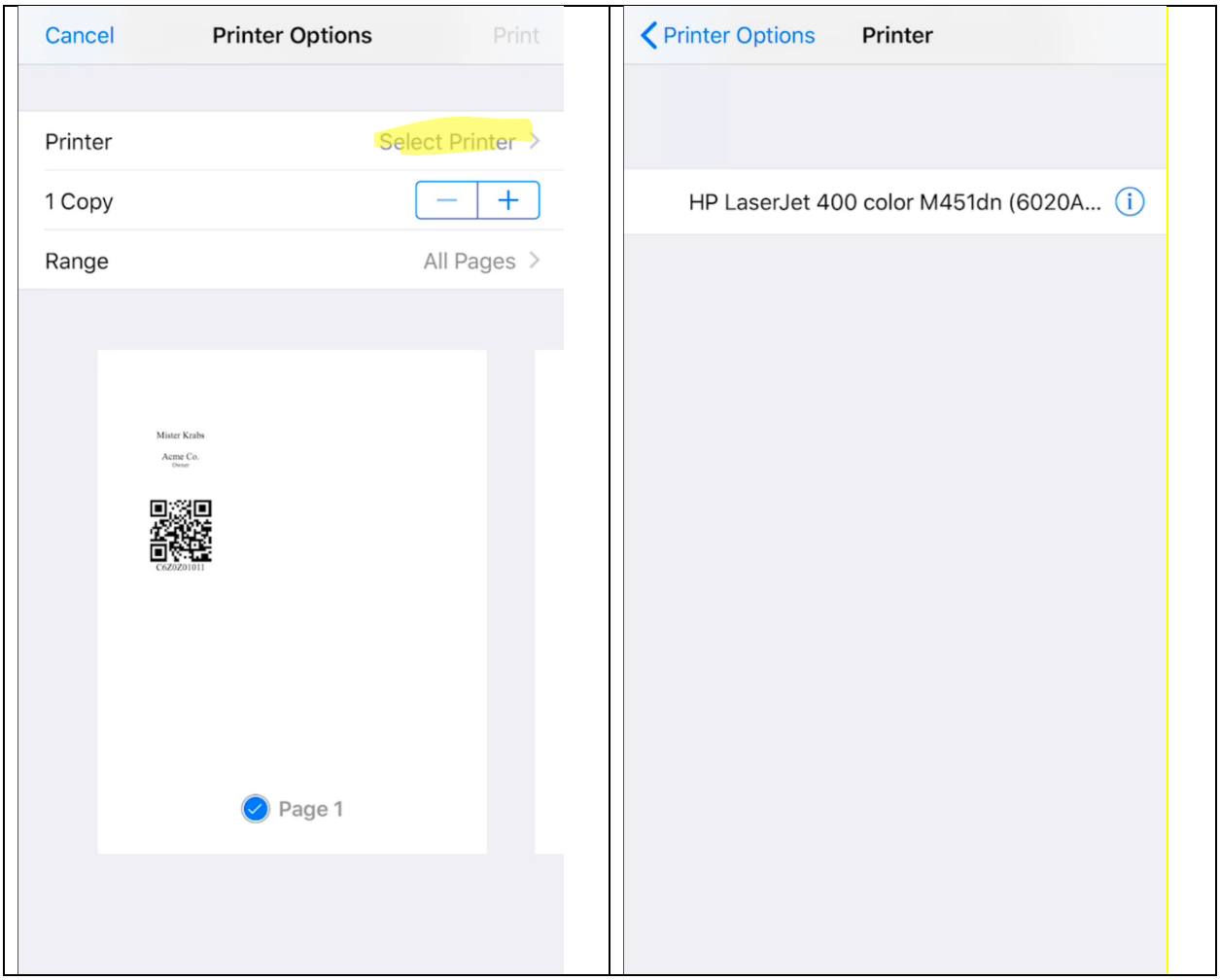
5. On the ticket record, choose Timeline. Then click on the Event Badge template to open. Choose Okay.



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.***)

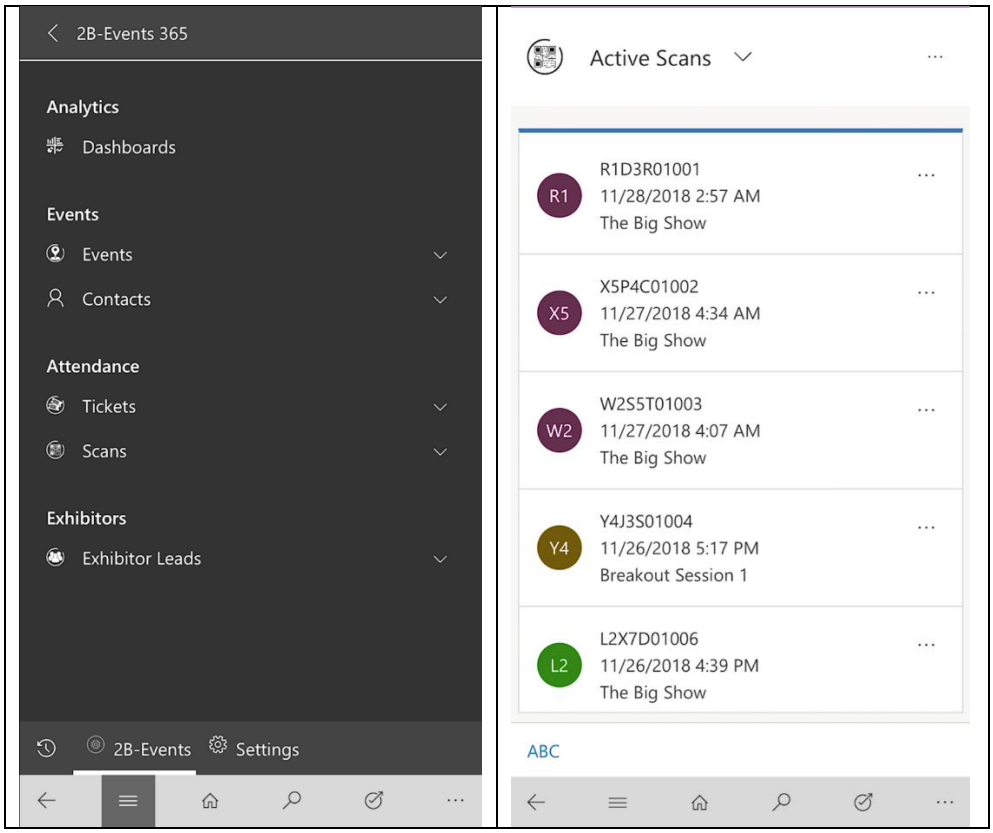


7. Select the appropriate printer and then PRINT.

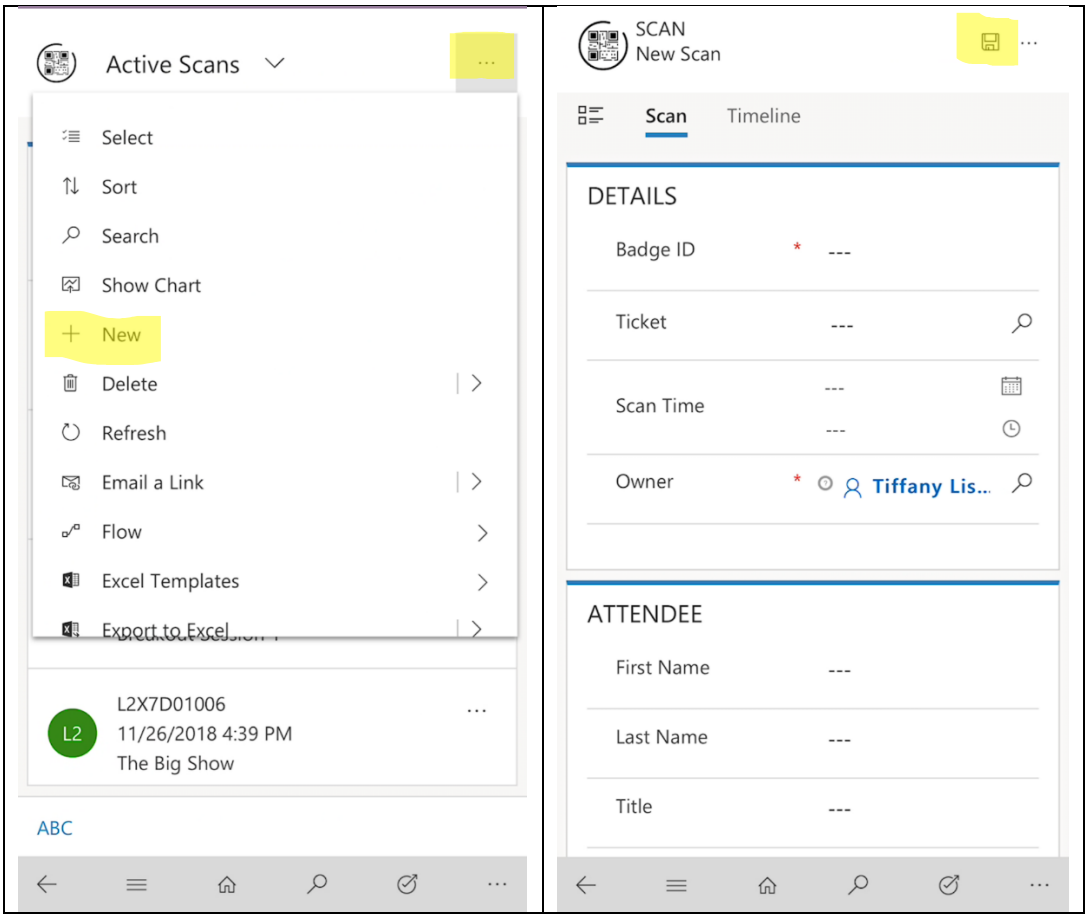


SCANS

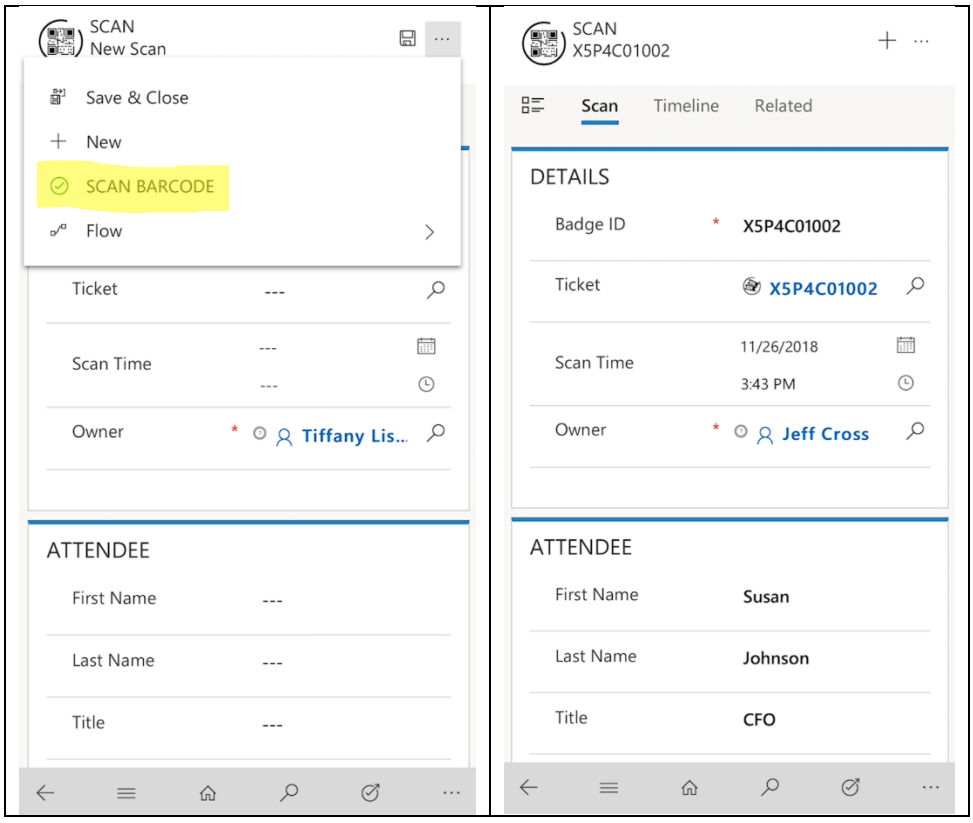
1. To see a list of Active Scans, select Scans from home page.



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

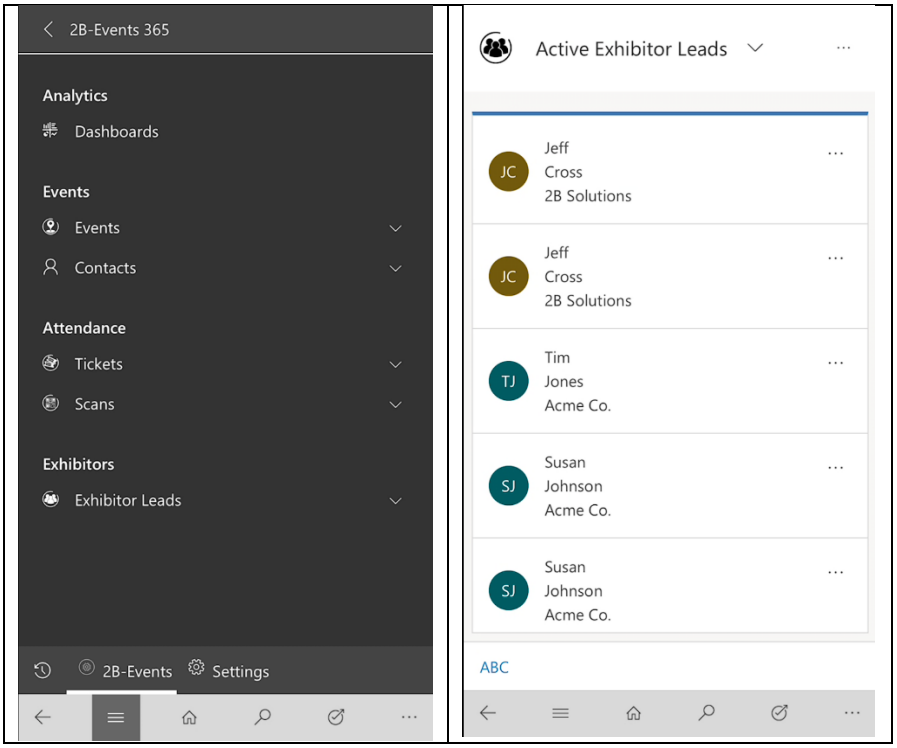


3. To scan an existing ticket/badge, press … then Scan Barcode. The device camera will open and the QR Code can be scanned. The Scan record will auto-populate.

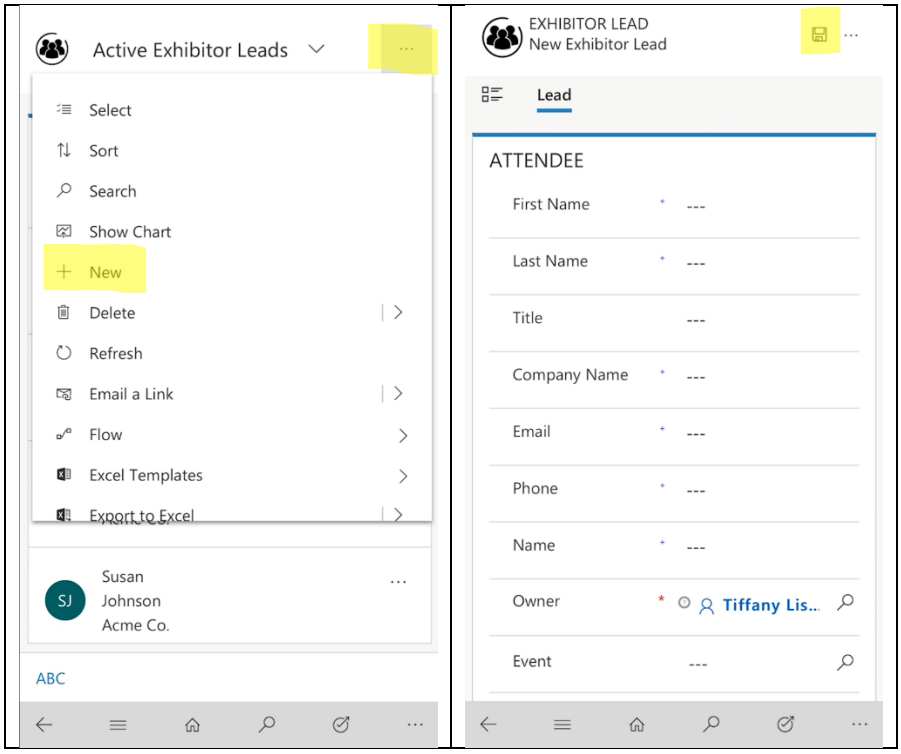


EXHIBITOR LEADS

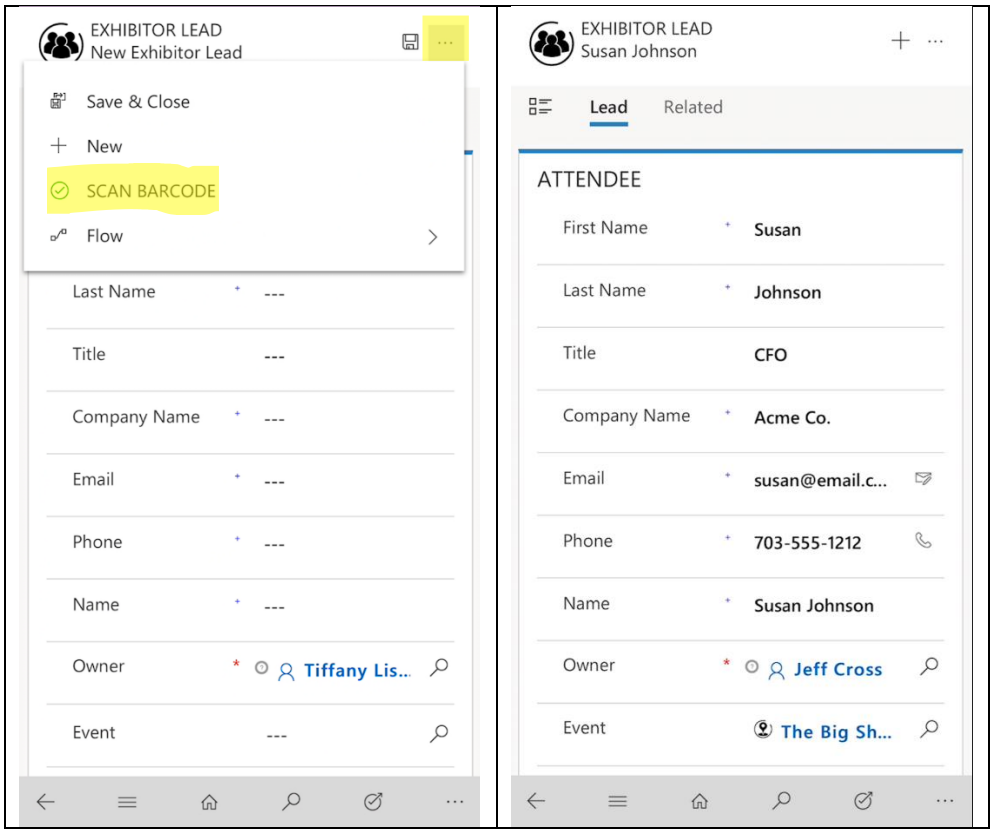
1. To view a list of Active Exhibitor Leads, choose Exhibitor Leads from the home screen.



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



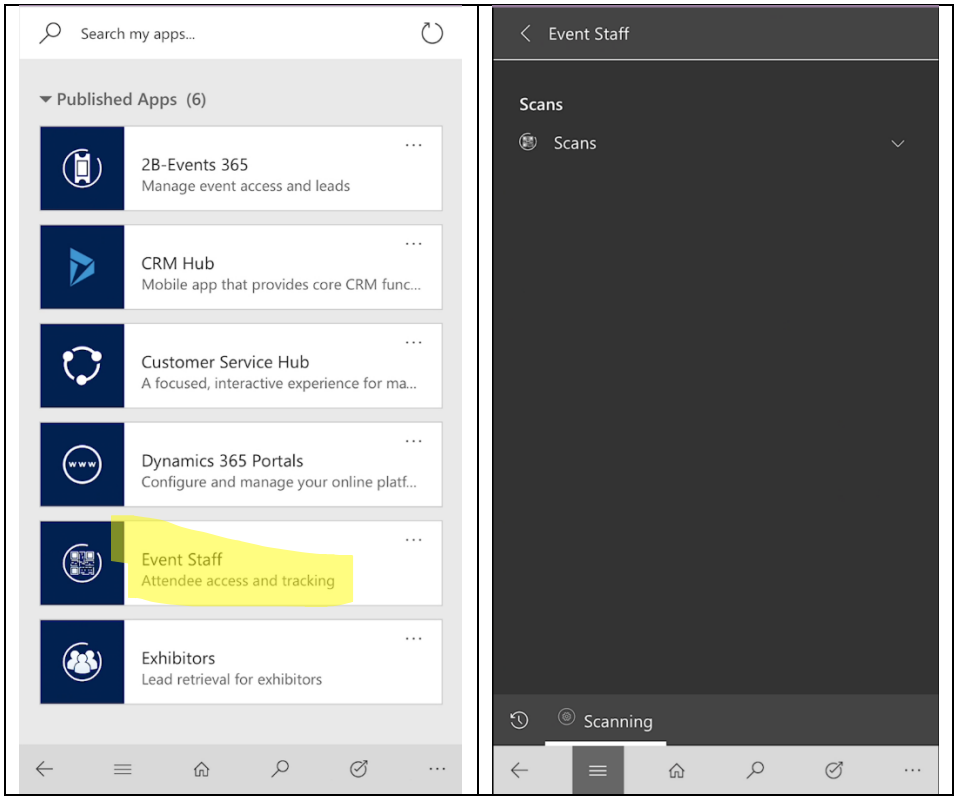
4. To enter a new Exhibitor Lead by scanning a QR Code, press … then Scan Barcode. The device camera will open and the QR Code can be scanned. The Exhibitor Lead record will auto-populate based on the QR Code.


EXHIBITOR LEAD
New Exhibitor Lead
Save & Close
New
SCAN BARCODE
Flow
Last Name
Title
Company Name
Email
Phone
Name
Owner
Tiffany Lis...
Event
EXHIBITOR LEAD
Susan Johnson
Lead
Related
ATTENDEE
First Name
Susan
Last Name
Johnson
Title
CFO
Company Name
Acme Co.
Email
susan@email.c...
Phone
703-555-1212
Name
Susan Johnson
Owner
Jeff Cross
Event
The Big Sh...

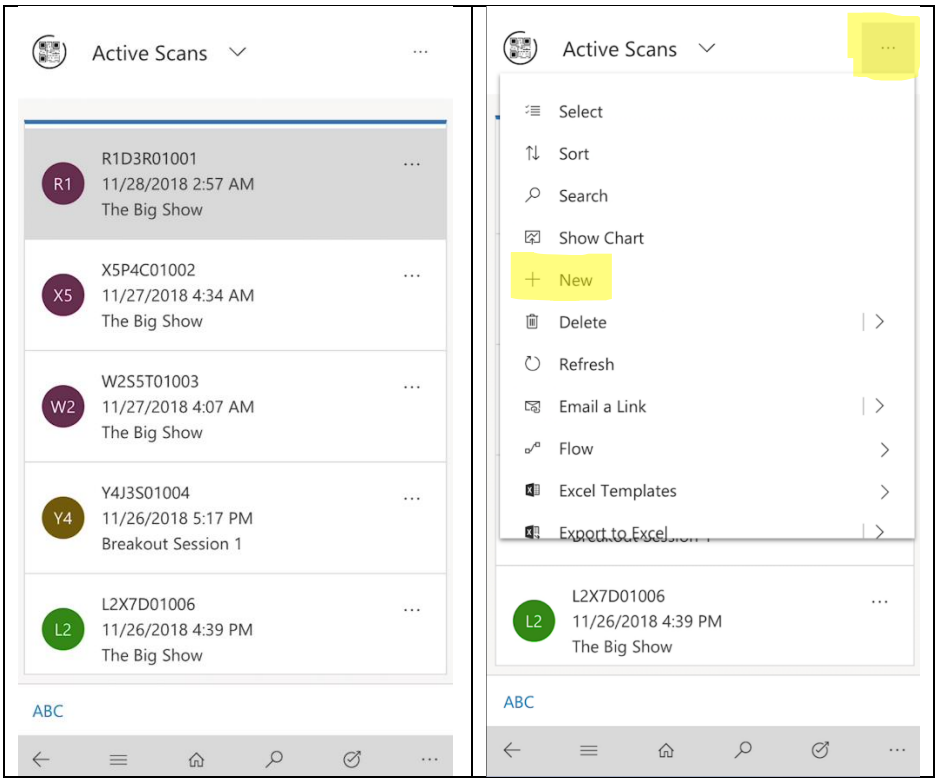
2B-EVENTS MOBILE APP FOR EVENT STAFF

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.

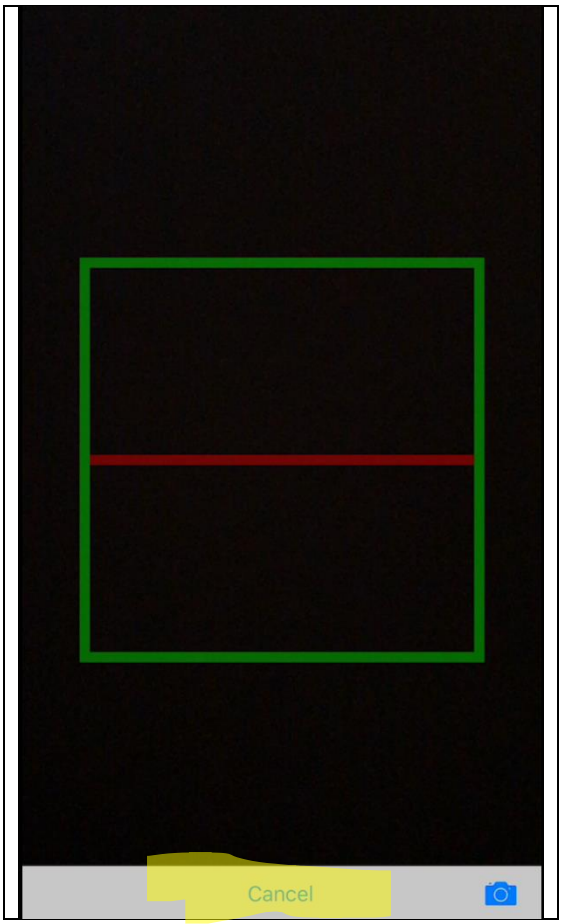
1. After logging into your Dynamics 365 mobile application, select the Event Staff application.



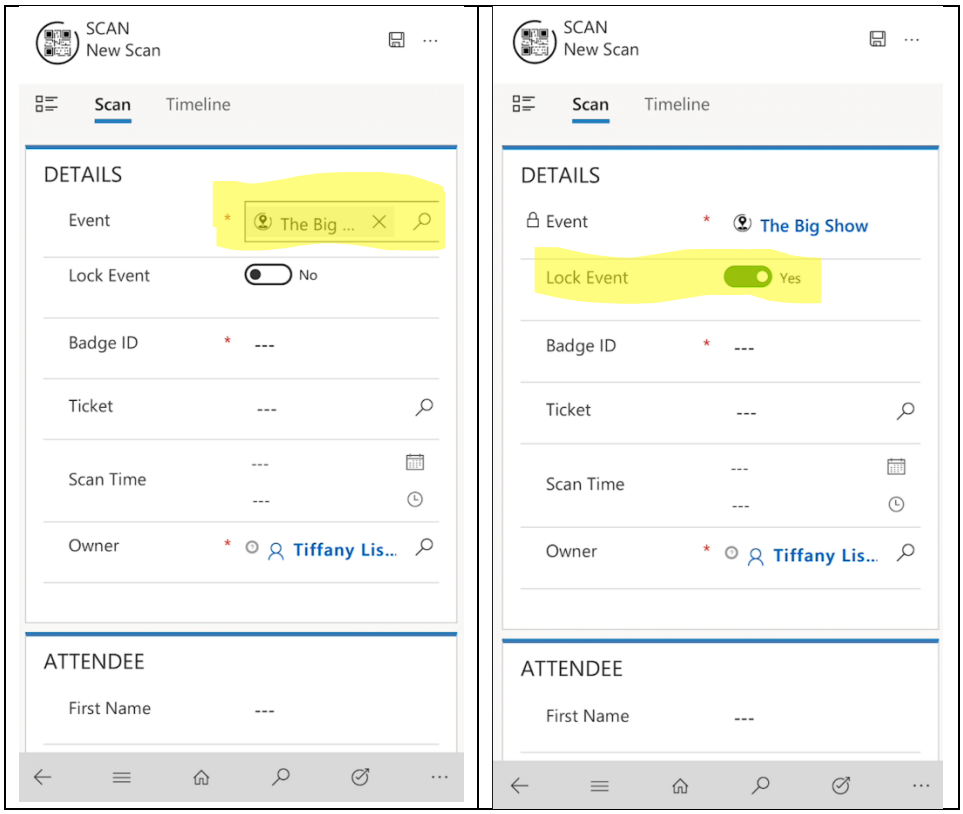
2. To set up the app to begin a series of ticket scans, choose Scans. Then choose … and + New.



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

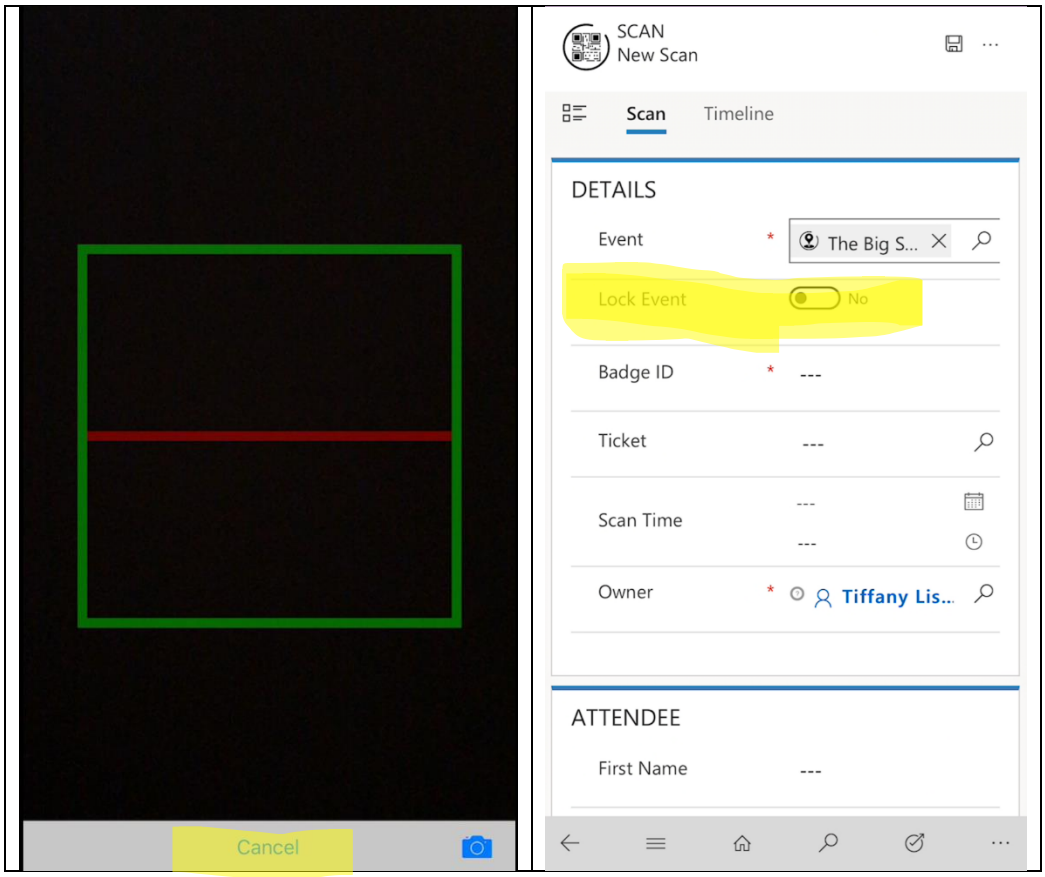


4. The screen will return to a new Scan record. Search for the related Event. Then toggle Lock Event to YES. This locks the Event and allows for multiple ticket scans for the same event.

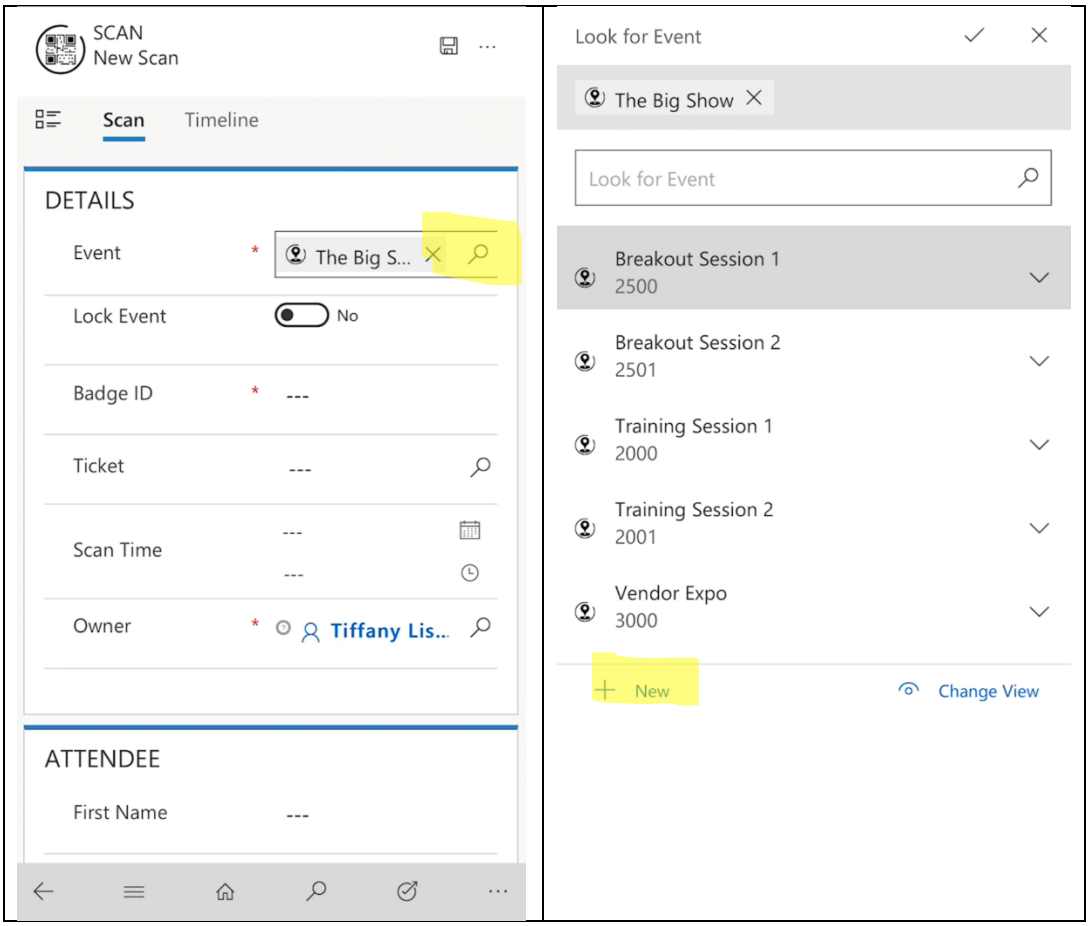


5. The device camera will open allowing the QR Code to be scanned. The form will auto-populate with the scan information, auto-save and reopen the camera to scan the next ticket. Tickets can continue to be scanned in this way until the Event is over or until the related Event needs to be changed.

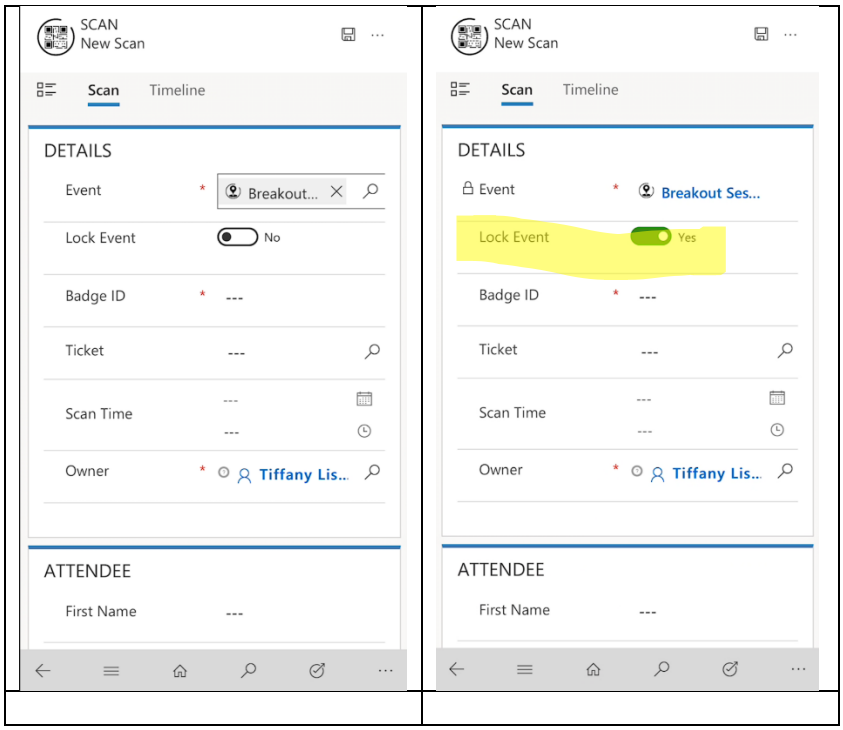
6. To change to another Event, press Cancel on the camera screen.



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.


SCAN
New Scan
Scan
Timeline
DETAILS
Event
Breakout...
Lock Event
No
Badge ID

Ticket

Scan Time

Owner
Tiffany Lis...
ATTENDEE
First Name

SCAN
New Scan
Scan
Timeline
DETAILS
Event
Breakout Ses...
Lock Event
Yes
Badge ID

Ticket

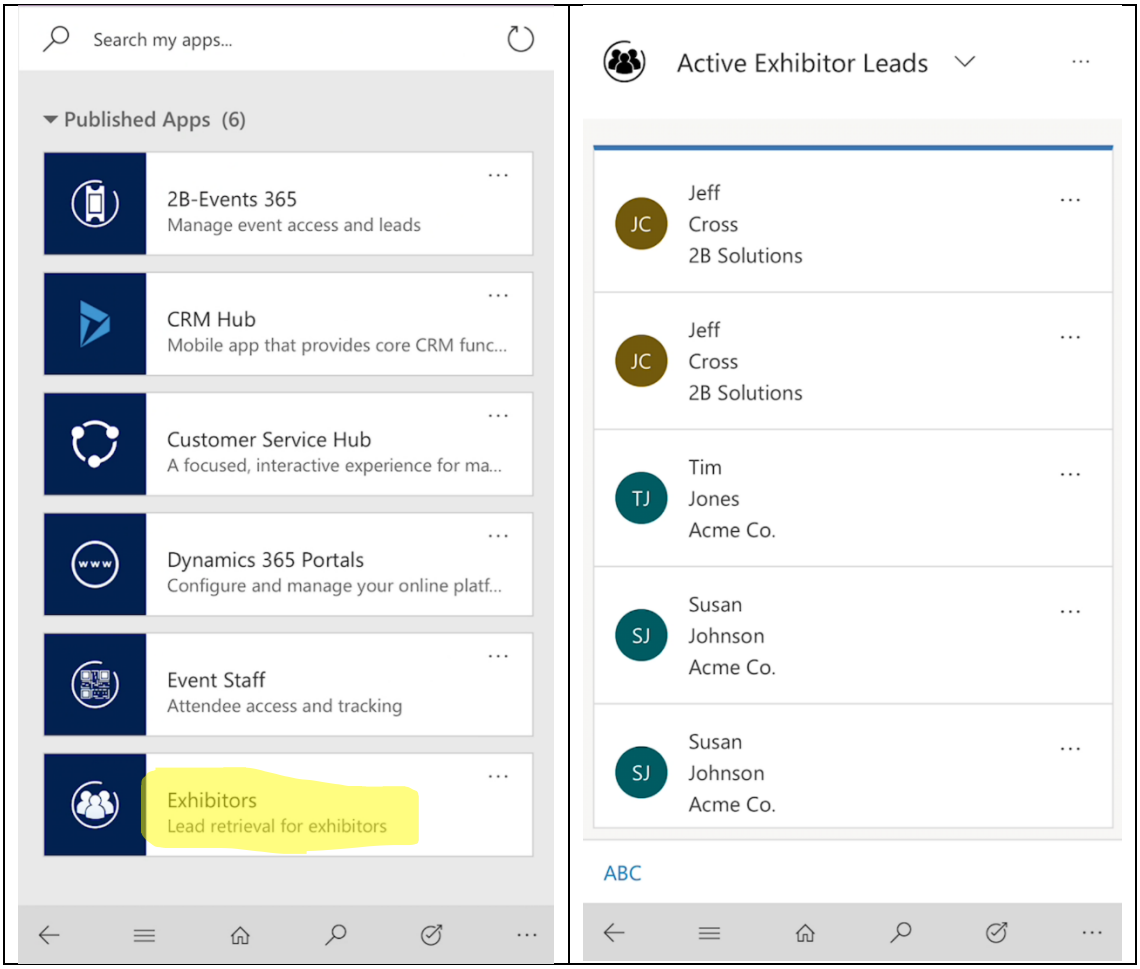
Scan Time

Owner
Tiffany Lis...
ATTENDEE
First Name

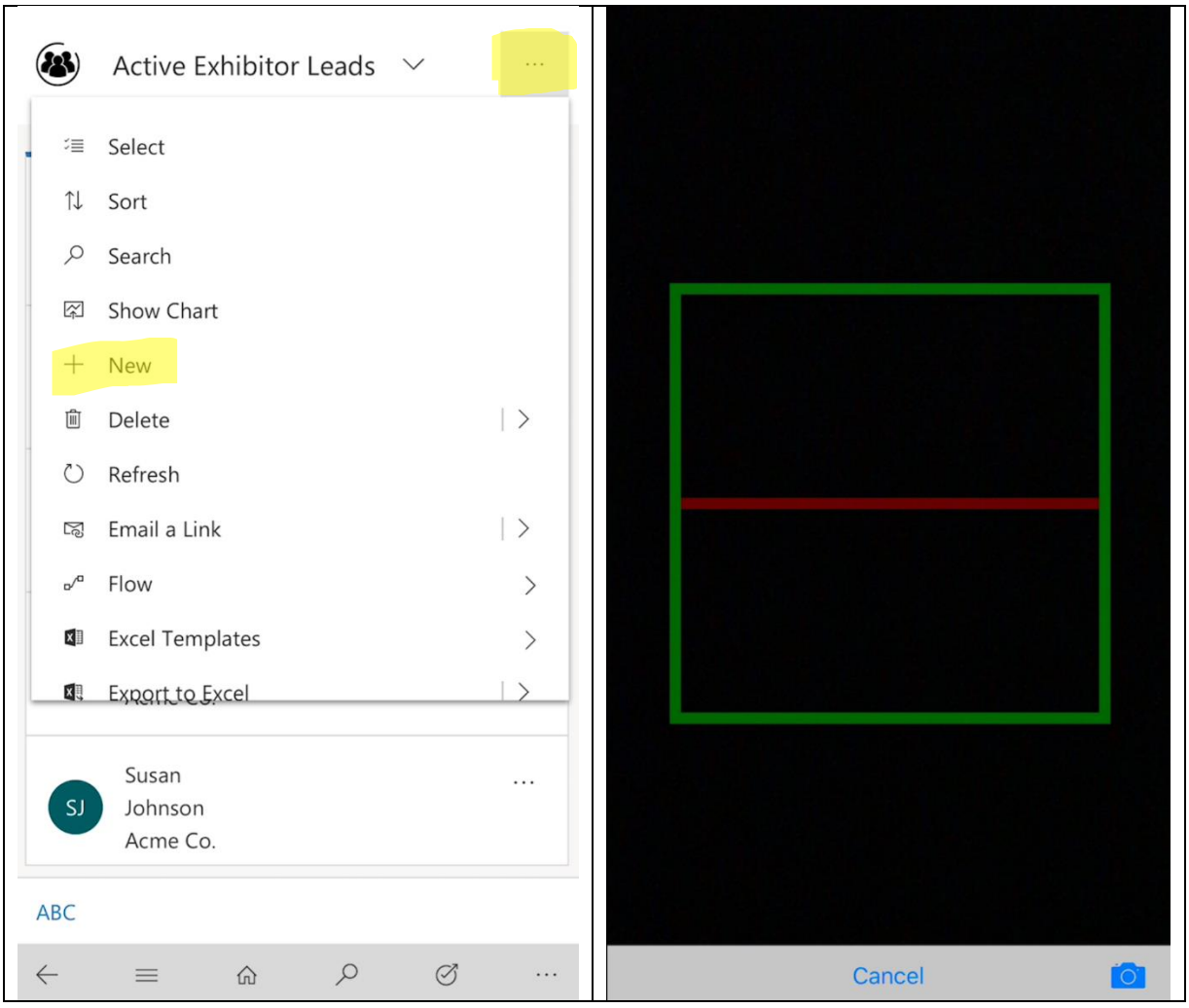
2B-EVENTS MOBILE APP FOR EXHIBITORS

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.