

2B-EVENTS 365 USER GUIDE

Version 2.1.0.0

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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.

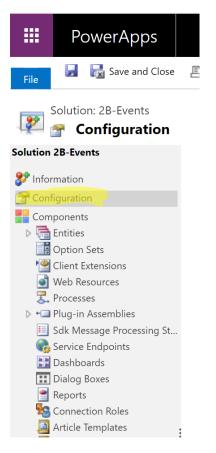
INITIAL CONFIGURATION OF 2B-EVENTS 365

Step 1. License Registration

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

Solutions 🖌 🗙 🖷 🗗 🖏 👼	🖩 🐺 👂 👒 ն	a l Mari	Actions *				Search for records	1
Name	🛗 💀 🗩 👒 💽	Version	Installed On ↓	Package T	Publisher	Description	I	
MicrosoftIdentityWork	Dynamics 365 Portals	8.3.0.0	10/15/2018	Managed	Microsoft	Contains the v	vorkflow processes that are used b	
MicrosoftIdentitySyste.	Dynamics 365 Portals	8.3.0.0	10/15/2018	Managed	Microsoft	Contains the v	vorkflow processes that are used b	
MicrosoftIdentity	Dynamics 365 Portals	8.4.0.2	10/15/2018	Managed	Microsoft	Extends porta	s to include authentication and id	
WebNotification	Dynamics 365 Portals	8.3.0.3	10/15/2018	Managed	Microsoft	Contains entit	ies and plug-in assemblies that pr	
MicrosoftCrmPortalBa.	Dynamics 365 Portals	8.3.0.2	10/15/2018	Managed	Microsoft	Workflow pro	cesses utilized by portals.	
MicrosoftCrmPortalBa.	Dynamics 365 Portals	8.3.0.2	10/15/2018	Managed	Microsoft	Workflow pro	cesses utilized by portals.	
MicrosoftCrmPortalBas	e Dynamics 365 Portals	8.4.0.12	10/15/2018	Managed	Microsoft	Required port	al components.	
msdynce_PortalPrivacy	Portal Privacy Extensio	8.4.0.3	10/15/2018	Managed	Microsoft Dynamics 365	Extends porta	capabilities by providing addition	
MicrosoftCrmPortalDe.	Dynamics 365 Portals	8.3.0.3	10/15/2018	Managed	Microsoft	Required port	al components.	
msdynce_CustomerSe.	Customer Service Hub	9.0.20.0329	8/26/2018	Managed	Dynamics 365	Patch for Dyna	amics 365 workload for service.	
msdynce_Customerser	Customer Service Hub	9.0.5.56	8/26/2018	Managed	Dynamics 365	A focused, int	eractive 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	4/19/2019	Unmanag	CDS Default Publisher			

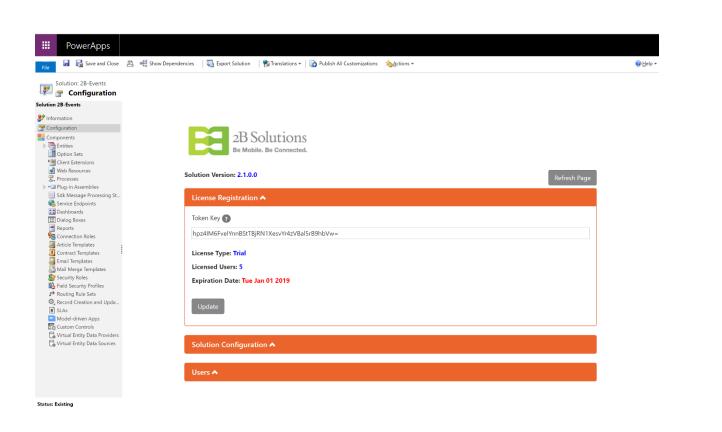
Open the solution, and you should be in the **Configuration** node of your Solution environment.



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**.

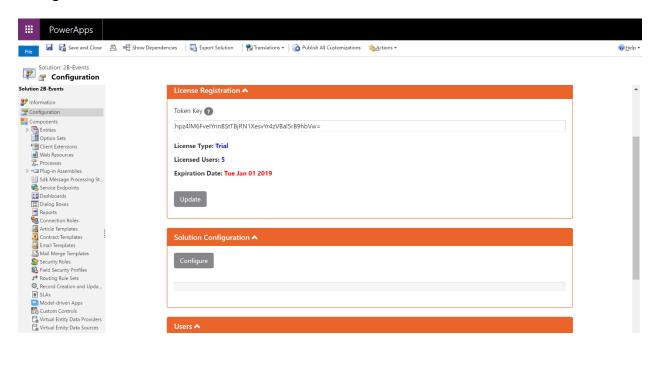
NOTE: The token code is sent to you in a separate email. Copy and paste the code into the text box.

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 365 licenses that are available for assignment and how many are currently assigned.

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mail Templates				
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outing Rule Sets		Jeff Cross	2bevents365dev	
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LAs		Shawn Shelton	2bevents365dev	
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ustom Controls		Tiffany Lisowski	2bevents365dev	
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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**.

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Service Endpoints				
Dashboards	All Users		*	
Dialog Boxes Reports				
Connection Roles	Status	Full Name	Business Unit	
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Article Templates				
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Contract Templates Email Templates Mail Merge Templates Security Roles		# Support	2bevents365dev	
Contract Templates Email Templates Mail Merge Templates Security Roles Field Security Profiles Routing Rule Sets				
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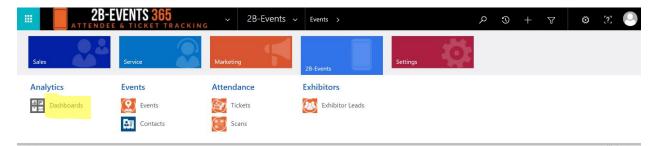
License Registration, Solution Configuration and Users Complete!

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 \rightarrow Analytics \rightarrow Dashboards



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Attendance and Registra	ation						
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	2018 2:57 AM The Big Show	R1D3R01001 1	1/28/2018 2:57 AM Jeff Cross				-

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EVENTS

CREATING NEW EVENTS

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

	VENTS 365	∽ 2B-Events ~	Events >	Q	Ś	+	∇	۵	[?]	0
Sales	Service	Marketing	28-Events	Ö						
Analytics	Events	Attendance	Exhibitors							
Dashboards	Events	Tickets	Exhibitor Leads							
	Contacts Events	Scans								

 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 <u>Create & Edit</u> <u>Views</u>.

⊨ Active Events	¥				Search for r	ecords	
□ Title ↑	Event Code	Event Time Location	1 Location 2	Company	Restricted	Access Code Creati 🍸 🖒	
Breakout Session 1	2500	10/19/2018 1:00 P Central	avilion Chicago Room	XYZ Events	No	11/13/2018 3:	5 0
Breakout Session 2	2501	10/19/2018 3:30 P Central	avilion Dallas Room	XYZ Events	No	11/13/2018 3:	:5
The Big Show	1111	10/19/2018 9:00 Civic Ce	ter Convention Hall	XYZ Events	No	10/18/2018 9:1	6
Training Session 1	2000	10/19/2018 11:00 East Pav	lion Orlando Room	XYZ Events	No	11/13/2018 3:	4
Training Session 2	2001	10/19/2018 8:00 East Pav	lion Charleston Roon	m XYZ Events	No	11/13/2018 3:	4 0
Vendor Expo	3000	10/19/2018 5:00 P West Pa	ilion Seattle Hall	XYZ Events	No	11/13/2018 3:	4

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

2B-EVENTS 365 2B-Events ~ Events >	ଓ ନ ୬ ଓ ବ	[?]
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Antive Events Y	Search for records	Q
□ Title ↑ Event Code Event Time Location 1 Location 2 Company	Restricted Access Code Creati 🍸 💍	<

 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 <u>Create and Edit Fields</u> (Attributes) and <u>Create &</u> <u>Design Forms</u>.

		<mark>se +</mark> NEW ⊿∕ ^a FLOW	▼ I FORM EDITOR			1	т Ψ
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								11/13/2018 3:		

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 \rightarrow Events \rightarrow Double-click on the appropriate Active Event.

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	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	Ð
	Training Session 1	2000	1110/19/2018 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	000
	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 +.

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		1.000	Central Pavilion	Chicago Room Dallas Room	XYZ Events XYZ Events	No	11/13/2018 3:51 11/13/2018 3:53
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Breakout Session 1 Breakout Session 2	2500 2501	10/19/2018 1:00 10/19/2018 3:30	Central Pavilion Central Pavilion East Pavilion	- Dallas Room	XYZ Events	No	11/13/2018 3:53

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

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Location 2	Convention Hall									
Restricted	No									
Access Code										
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Title ↑		Event Time	Location 1	10/19/20 10/19/20 10/19/20	18 1:00 PM 18 3:30 PM	Restricted	Access Code	Created On		
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4. To relate a new related Event, click +New.

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

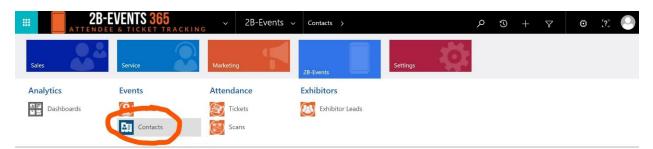
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The Big Show	New Event 📹				
Location 1	▲ General				•
Location 2	Title *		Company XYZ Event	s	
Restricted	Event Code		Company Code 2222		
Access Code	Event Time		Owner * 🚨 Tiffan	y Lisowski	
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Training Session 2					18 3:49
1 - 4 of 5	There aren't any notes to sho	w. To get started, enter a note.			Page 1 🕨
Created On					•

CONTACTS

CREATING NEW CONTACTS

2B-EVENTS uses the Contacts functionality available with Dynamics 365. To learn more about Contacts, see <u>Work with Accounts and Contacts in Customer Engagement Apps</u>.

1. Navigate to 2B-EVENTS \rightarrow Events \rightarrow Contacts



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

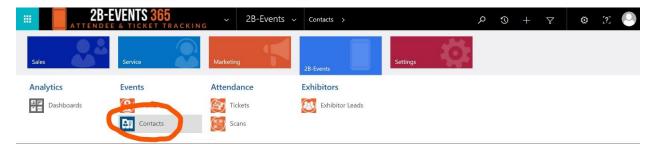
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New "create tive concentrations" ~				Search for records	
□ Full Name ↑	Email	Company Name	Business Phone		τÖ
George Moreno	George@2bsolutions	2B Solutions			
Jeff Cross	jeff@2bsolutions.net	2B Solutions	2054089991		
John Smith	john@email.com	Acme Co.	773-555-1212		Q
Mister Krabs	mkrabs@underthec.co	Acme Co.	836-555-5555		Ę
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		1
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		

 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 <u>Create and Edit Fields</u> (Attributes) and <u>Create & Design Forms</u> to learn more. Click SAVE & CLOSE.

	ntact 📹						Owner* Tiffany Lisowski
Summary						_	
CONTACT INFORMATI	ON	POSTS	ASSISTANT	ACTIVITIES	NOTES	TICKETS	
Full Name *						Badge Number	Contact
First Name *							
Last Name *						To enable this co	ontent, create the record.
Job Title		There aren	i't any notes to show	w. To get started, er	nter a note.		
Account Name							
Email						Company	
Business Phone							
Mobile Phone						RECENT OPPORT	UNITIES
						Торіс	Est. Revenue Est. C
Fax							
Fax Preferred Method of Contact	Any						

VIEW EXISTING CONTACTS

1. Navigate to 2B-EVENTS \rightarrow Events \rightarrow Contacts



2. Double-click on the Contact record.

EW 🛅 DELETE 🔽 🖘 EMAIL A LINK	✓ _B / ^a FLOW ✓ → RUN REPORT	▼ K EXCEL TEMPLAT	es 👻 🔍 export to excel 🛛 👻 📳	IMPORT DATA	
Active Contacts ▼				Search for records	,
□ Full Name ↑	Email	Company Name	Business Phone		τÜ
George Moreno	George@2bsolution	s 2B Solutions			Charts
Jeff Cross	jeff@2bsolutions.ne	t 2B Solutions	2054089991		
John Smith	john@email.com	Acme Co.	773-555-1212		Ð
Mister Krabs	mkrabs@underthec.	co Acme Co.	836-555-5555		Ê
Patrick Star	Patrick@underthec.c	com Acme Co.	334-444-4444		00
Portal Customer	customer@contoso.	co	425-555-5555		
Sandy Cheeks	sandy@underthec.co	om 2B Solutions	404-555-5555		
Spongebob Squarepants	sb@underthec.com	Acme Co.	703-555-5555		
Squidward Tentacles	squid@underthec.co	om Acme Co.	202-555-5555		
Susan Johnson	susan@email.com	Acme Co.	703-555-1212		
System Administrator	admin@contoso.cor	n	425-555-5555		
Tiffany Lisowski	tiffany@2bsolutions	.c 2B Solutions	205-408-9991		
Tim Jones	tim@email.com	Acme Co.	404-555-1212	This list contains 13 Contact records.	

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

W LO DEACTIVATE	CONNECT 🖾 👘 ADD TO MARKETING	LIST 😤 ASSIGN 🖘 EI	MAIL A LINK X DELI	TE CREATE INVITA	TION I CHANG	E PASSW	ORD ***		ΥΨ
CONTACT : 2	B-EVENTS CONTACT 🔻							Owner*	
Tiffany Li	sowski ™							STSTEIN	and the second for the second
Summary						4	y diana ng ang ang ang ang ang ang ang ang a		
CONTACT INFORMATI	ON	POSTS	ASSISTANT	ACTIVITIES	NOTES		TICKETS		+ =
Full Name *	Tiffany Lisowski	Enter a note					Badge Number	Contact	
First Name *	Tiffany	Linter a note				ter l'	W2S5T01003	Tiffany Liso	wski
Last Name *	Lisowski					1	and a second		
Job Title	VP of Sales						and the statistic statistical statistics	and an a second seco	And States of the Advanced
Account Name	2B Solutions					4	_		•
Email	tiffany@2bsolutions.com	There are	n't any notes to sho	w. To get started, en	ter a note.				
Business Phone	205-408-9991						Company		
Mobile Phone							2B Solutions		
Fax									
Preferred Method of Contact	Any						RECENT OPPORTU	Est. Revenue	+ III
Contact									

TICKETS

CREATING NEW TICKETS

1. Navigate to 2B-EVENTS \rightarrow Tickets

	VENTS 365 & ticket tracking	~ 2B-Events ~	Tickets >		Q	3	+	7	۵	2
Sales	Service	Marketing	2B-Events	Settings						
Analytics	Events	Attendance	Exhibitors							
Dashboards	Events	Tickets	Exhibitor Leads							
	Contacts	Scans								

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

 Active Tickets 	*					or records	
Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	ΥŬ
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	СМО	Acme C
C6Z0Z01011	Mister Krabs	The Big Show	No	Mister	Krabs	Owner	Acme G
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 G
V0K1K01008	Patrick Star	The Big Show	No	Patrick	Star	Facilitator	Acme C
Z7J1Z01012	Squidward Tentacles	The Big Show	No	Squidward	Tentacles	Jazz Virtuoso	Acme G

3. Click +NEW to create a new Ticket.

	VENTS 365					9 + V	© [?]
vew 🔟 delete 🔹 🖘	EMAIL A LINK ▼ _D / ²⁴ FLOW	👻 🖻 RUN REPORT 👻 🖾 EXCE	EL TEMPLATES ▼ 48, EXI	PORT TO EXCEL 👻	MPORT DATA	HART PANE 👻 🚥	
-⊨ Active Tickets	v				Search f	or records	
Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	τυ
		Event The Big Show	Scanned No	First Name	Last Name ↑ Cheeks	Job Title	각 (신)
Badge Number	Contact			•			τυ

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

	Badge Number Scanned
QR CODE	SCANS
	Scanned No
	Scan Count 🔒 📓
	Owner * 🕹 Tiffany Lisowski
QR Code Data	
·	Section
ACTIVITIES NOTES	Row
	Seat
	Seat
There aren't any notes to show. To get started, enter a not	
	QR Code Data

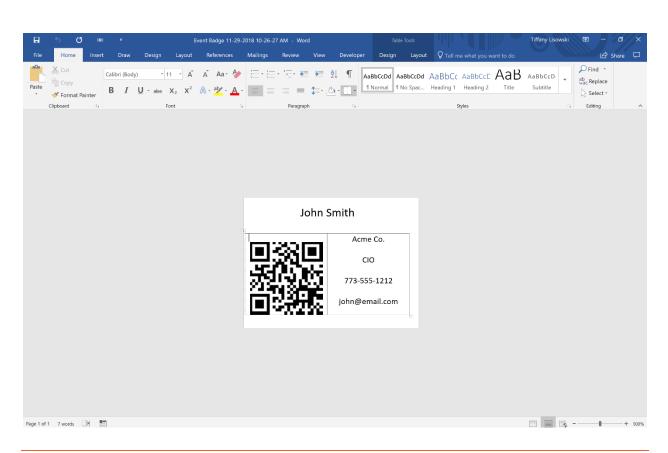
5. Once the form is saved, a unique Badge Number and QR Code embedded with the Badge Number will be created. (The screen may need to be refreshed before it will display the QR Code.)

W 🗟 DEACTIVATE 🧃	🗊 DELETE 📲 PROCESS 👻 🚔 ASSIGN	I 😲 SHARE 🖙 EMAIL A LIN	K SKON WORKFLOW	START DIALOG			Т
ICKET : INFORMATION 0P4Y01013 ™	ı				Badge Number TOP4Y01013	Scanned No	
ATTENDEE		QR CODE			SCANS		
Badge Number	TOP4Y01013				Scanned	No	
Event	The Big Show				Scan Count	■ 🖬 0	
Contact	John Smith				Owner *	🌡 Tiffany Lisow	vski
First Name	John	QR Code Data	iVBORw0KGgoA	AAANSUhEUgA 🗘	LOCATION		
Last Name	Smith						
Title	CIO	ACTIVITIES	5	NOTES	Section		
Company	Acme Co.	Enter a note			Row		
Email	john@email.com				Seat		
Phone	773-555-1212						
Access Code							

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

EW 🗟 DEACTIVATE 👖	EE & TICKET TRACKING	✓ 2B-Events ✓ × 2B-Events ✓ × SHARE ∞ EMAIL A LIN		_	م	S	I	∇	۲	[?]
		N Q SHARE 📾 EMAIL A LIN	K 🤯 RUN WORKFLOW	_	√ ^a Flow	•			Т	*
TICKET : INFORMATION	4			_	Word Templates		Create Word	Scanned d Template		
T0P4Y01013 -≡					Run Report	•	Create	Word Templa	ate	
				G	Other Activities	•	Word Temp	lates		
					E Form Editor		Event B	ladge		
ATTENDEE		QR CODE			SCAINS		Event B	Badge Tall		
Badge Number	TOP4Y01013				Scanned		No			
Event	The Big Show				Scan Count		₽ 0			
Contact	John Smith				Owner *		å 1	Tiffany Lisov	wski	
First Name	John	QR Code Data	ivborw0KggoAA	AANSUhEUgA 🇘	LOCATION					
Last Name	Smith									
Title	CIO	ACTIVITIES	5	NOTES	Section					
Company	Acme Co.	Enter a note			Row					
Email	john@email.com				Seat					
Phone	773-555-1212									
Access Code										
Created On	11/29/2018 10:21 AM	Modified On	11/29/2018 10):22 AM	Modified By		Tiffan	iy Lisowski		

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 \rightarrow Tickets

	EVENTS 365 e & ticket tracking	∽ 2B-Events √	/ Tickets >		Q	Ś	+	Y	٢	[?]	0
Sales	Service	Marketing	2B-Events	Settings							
Analytics	Events	Attendance	Exhibitors								
bashboards	Events	Tickets	Exhibitor Leads								
	Contacts	Scans									

2. Double-click Ticket record.

-¤ A	ctive Tickets	~							2
	Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	T O	<
	S6W8Y01009	Sandy Cheeks	The Big Show	No	Sandy	Cheeks	Karate Instructor	2B Solut	Charts
	R1D3R01001	Jeff Cross	The Big Show	Yes	Jeff	Cross	CEO	2B Solut	
	X5P4C01002	Susan Johnson	The Big Show	Yes	Susan	Johnson	CFO	Acme C	Ð
	S9S5W01005	Tim Jones	The Big Show	Yes	Tim	Jones	СМО	Acme C	
	C6Z0Z01011	Mister Krabs	The Big Show	No	Mister	Krabs	Owner	Acme C	000
	W2S5T01003	Tiffany Lisowski	The Big Show	Yes	Tiffany	Lisowski	VP of Sales	Acme C	
	L2L1X01007	George Moreno	The Big Show	No	George	Tiffany	VP		
	Y4J3S01004	John Smith	The Big Show	Yes	John	Smith	CFO	Acme C	
	T0P4Y01013	John Smith	The Big Show	No	John	Smith	CIO	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	

3. Changes can be made from the Ticket record.

TICKET : INFORMATIO			Badge Number Scanned
W2S5T01003 •	=		
ATTENDEE		QR CODE	SCANS
Badge Number	W2S5T01003	ne:n	Scanned Yes
Event	The Big Show		Scan Count 🛛 🔒 🖩 1
Contact	Tiffany Lisowski		Owner * 🎍 Jeff Cross
First Name	Tiffany	QR Code Data IVBORw0KGgoAAAANSUhEU	
Last Name	Lisowski		
Title	Sales Manager	ACTIVITIES NOTES	
Company	Acme Co.	Enter a note	
Email	tiffany@2bsolutions.com	Event Badge.docx Jeff Cross - Yesterday 5:06 AM	Seat
Phone	205-408-9991	QR Code	
Access Code		QR Code	
		Jeff Cross - 11/27/2018 4:05 AM	

BULK PRINT ACTIVE TICKETS

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

1. Navigate to 2B-Events \rightarrow Attendance \rightarrow Tickets

	2B-EVENTS 365 Ndee & ticket management	~ 2B-Events 、	✓ Tickets >		<u>ک</u> کر	+ 7	۲	<u>?</u>
Sales	Service	Marketing	2B-Events	Settings	Training	?		
Analytics	Events	Attendance	Exhibitors					
Dashboards	Events	Tickets	Exhibitor Leads					
	Contacts	Scans						

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

		-EVENTS 365 e & ticket management	~ 2B-Events	✓ Tickets >		Q	9 + 7	⊜ 3
IEW	🖋 EDIT 🛛 🗸 ACTIVATE	🗟 DEACTIVATE 🛛 🗴 DELETE	👻 🍰 ASSIGN (🤇 SHARE	🖘 EMAIL A LINK 🔻	🔅 RUN WORKFLOW			
-= A	Active Tickets	v				Search f	or records	
		1.0.1	1.5.1		Let us		L c c seu	
	Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	▼ ()
	SeW8Y01009	Sandy Cheeks	The Big Show	Yes	Sandy	Cheeks	Karate Instructor	Acme C
						encerts		Acine e
2	.620201011	Mister Krabs	The Big Show	No	Mister	Krabs	Owner	Acme C
	.6Z0Z01011 Q7M8R01010	<u>Mister Krabs</u> Spongebob Squarepants	The Big Show	No				
0					Mister	Krabs	Owner	Acme C

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

NEW PEDIT		前 DELETE > 출ቆ ASSIGN Event	SHARE 👓 EMAIL A LI	- -	e ^{ya} Flow Run Report Excel Templates By Import Data))))	Run on Selected Reco Event Badge		2
🗹 Badge Nu		Event	Scan	eret Nam	Run Report	•	Event Badge		
🗹 Badge Nu		Event	Scan	ned First Nam	Excel Templates	•	Event Badge		
	umber Contact	Event	Scan	and First Nam	🗊 Import Data				<
- 1 - 0	umber Contact	Event	Scan	ed First Nam		•			<
	umber Contact	Event	Scan	ed First Nam					
S6W8Y01					e Chart Pane	•	Job Title	T ()	
	009 <u>Sandy Cheek</u>	<u>s The Big Sh</u>	<u>10W</u> Yes	Sandy	曜 View		Karate Instructor	Acme (Charts
C6Z0Z010	011 <u>Mister Krabs</u>	The Big Sh	now No	Mister	👍 New System View		Owner	Acme	
		<u></u>			Customize Entity				Ð
Q7M8R0	1010 <u>Spongebob S</u>	iquarepants The Big Sh	<u>now</u> No	Spongebo	b System Views		Fry Cook	Acme (
V0K1K01	008 Patrick Star	<u>The Big Sh</u>	now No	Patrick	Star		Facilitator	Acme (

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

🗹 Badge Numb	er Contact	9		Last Name 🛧	Job Title	U T
S6W8Y01009		Select Records Select which records you want to use in this report.	×		Karate Instructor	
C6Z0Z01011				Krabs		Acme C
Q7M8R01010		Report: Event Badge			Fry Cook	
V0K1K01008		Use these records:				Acme C
Z7J1Z01012		All applicable records All provide the cords All records All records on all pages in the current view				Acme C

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

III 2B-EVE Attendee & ti	Report Viewer: Event Badge - Google Chrome – – × https://2bevents365dev.crm.dynamics.com/crmreports/viewer/viewer.aspx?action=run&context=records&helpID=EventBadge.rdl&id= 	7 0	2 🕓
+ NEW 🖋 EDIT 🗸 ACTIVATE 🕼	File 🕜 <u>H</u> elp +		
-⇔ Active Tickets ×	Edit Filter		Q
Badge Number		T (5 4
S6W8Y01009	Patrick Star	ructor Acmi	e Charts
C6Z0Z01011	Acme Lo.	Acm	
Q7M8R01010	334-444-4444 Patrick@underthec.com	Acm	e C
V0K1K01008	VOK1K01008	Acmi	
Z7J1Z01012		oso Acmi	e C 000

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.)

EDIT ✓ ACTIVATE	https://2bevents365dev.crm.dynamics.com/crmreports/viewer/viewer.aspx?action=run&context=records&helpID=EventBa	□ × ndge.rdl&id= ⊘Help •	© [?]
→ Active Tickets ×	File Edit Filter I		٩
Badge Number S6WBY01009 C6Z0Z01011 Q7M8R01010	Patrick Star Acme Co. Facilitator 334-444-4444	ructor	Acme C Acme C
V0K1K01008 Z7J1Z01012	Patrick@under Voktko1003 Print We'll create a printer-friendly PDF version of your report. Page size: Default (2.12" x 3.37")	iso	Acme C
	Page orientation: Landscape Print Cancel		
1 - 5 of 5 (5 selected)		Pa) age 1

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

	Report Viewer: Event Badge - Google Chrome	-		7 🗢 🖸 🔍
+ NEW ✓ EDIT ✓ ACTIVATE	FI Print	reports/viewer/viewer.aspx?action=run&context=records&helpID=EventBadg	ge.rai&ia=	
⇔ Active Tickets ×	Total: 5 sheets of paper Print Cancel	Patrick Star		Q
Badge Number	Destination The Area (Network)	Acme Co.		× 0 ×
S6W8Y01009	Change	Facilitator	ruct	or Acme C
C6Z0Z01011	Pages 💿 All	334-444-4444		Acme C
Q7M8R01010	e.g. 1-5, 8, 11-13	Patrick@underthec.com		Acme C
V0K1K01008	Copies 1	V0K1K01008		Acme C
Z7J1Z01012	Color Black and white		ISO	Acme C
	Paper size Letter (8 1/2 x 11 in)			1
	320	Sandy Cheeks		
	Print using system dialog (Ctrl+Shift+P)	Acme Co.		
		Karate Instructor 404-555-5555		
•		sandy@underthec.com		•
1 - 5 of 5 (5 selected)		20-14CH13-300	•	Page 1 🕨
SCANS				

2B-EVENTS 365 USER GUIDE pg. 25

VIEW TICKET SCAN INFORMATION

1. Navigate to 2B-EVENTS \rightarrow Tickets \rightarrow Scans

	EVENTS 365	v 2B-Events 🗸	Tickets > W2S5T0100)3 >	م	3	+	Y	٢	[?]
Sales	Service	Marketing	2B-Events	Settings	Į.					
Analytics	Events	Attendance	Exhibitors							
Dashboards	Events	Tickat	Exhibitor Leads							
	Contacts	Scans	ns							
P	and the second	1.124.25		1.1.1	e		0 -			

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

⇔ Active Scans	~					1	
Badge ID	Scan Time ↓	Event 🛧	Ticket	Created On	Owner		T O
R1D3R01001	11/28/2018 2:57 AM	The Big Show	R1D3R01001	11/28/2018 2:57 AM	Jeff Cross		
X5P4C01002	11/27/2018 4:34 AM	The Big Show	X5P4C01002	11/27/2018 4:34 AM	Jeff Cross		
W2S5T01003	11/27/2018 4:07 AM	The Big Show	W2S5T01003	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		11/26/2018 4:39 PM	Jeff Cross		
L2X7D01006	11/26/2018 4:37 PM	The Big Show		11/26/2018 4:37 PM	Jeff Cross		
S9S5W01005	11/26/2018 4:19 PM	Breakout Session 1	S9S5W01005	11/26/2018 4:19 PM	Jeff Cross		
S9S5W01005	11/26/2018 4:19 PM	Breakout Session 1	S9S5W01005	11/26/2018 4:19 PM	Jeff Cross		
\$9\$5W01005	11/26/2018 4:19 PM	The Big Show	S9S5W01005	11/26/2018 4:19 PM	Jeff Cross		
X5P4C01002	11/26/2018 3:43 PM	Breakout Session 2	X5P4C01002	11/26/2018 3:43 PM	Jeff Cross		
X5P4C01002	11/26/2018 3:43 PM	Breakout Session 2	X5P4C01002	11/26/2018 3:43 PM	Jeff Cross		
X5P4C01002	11/26/2018 3:43 PM	Breakout Session 2	X5P4C01002	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 \rightarrow Tickets \rightarrow Scans

E 2B-	EVENTS 365	→ 2B-Events →	Tickets >	W2S5T01003	>		ۍ م	+	Y	۲	(?) 🕓
Sales	Service	Marketing	2B-Events		Settings	Ö					
Analytics	Events	Attendance	Exhibitors								
Dashboards	Events	Ticket	Exhibitor	Leads							
	Contacts	Scans Sca	ns								
P	and and and	1,726 (2,76			I III -	c Ct		0 -			

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

2B-	EVENTS 365 e & ticket tracki	NG	2B-Events ~ Scan	s >		Q	9 +	\mathbb{V}	۲	[?]
NEW 🛅 DELETE 👻 🖙	P EMAIL A LINK ↓ ▼ P/ ^a FLOW	RUN REPOR	RT -	• 🔍 EXPORT TO EXCEL 🛛 •	import data	🔹 📲 сн/	ART PANE 🔻	•••		
^{New} → Active Scans	v.									C
Create a new Scan record.										···· >
Badge ID	Scan Time ↓	Event ↑	Ticket	Created On	Owner	1			T Ü	<
Creaté à New Scan Tecord.			Ticket R1D3R01001	Created On						<
Create & New Scan Netbrid: Badge ID	Scan Time ↓	The Big Show			Jeff Cross					<

3. Enter Scan information and SAVE & CLOSE

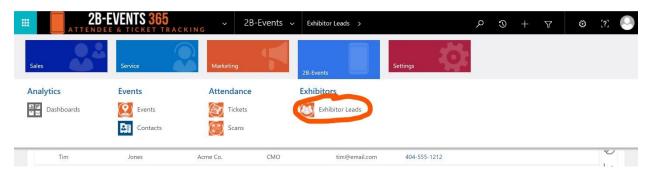
New Scan ™				
⊿ Scan				
DETAILS		ATTENDEE	NOTES	
Badge ID *		First Name	 ACTIVITIES	NOTES
Ticket		Last Name		
Scan Time		Title	 There aren't any notes to sho	u To get started opter a pet
Device Code		Company Name	 There aren't any notes to sho	w. lo get started, enter a not
Owner *	Tiffany Lisowski	Email		
COMPANY		Phone		
Company		EVENT		
Company Code		Event		

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 \rightarrow Exhibitors \rightarrow Exhibitor Leads



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

W m delete - 🗬	EMAILALINK	CKING		ATES 👻 🔍 EXPORT TO EXCEL		A CHART PANE	
W W DELETE I - C		LOW - FROM REPORT	EXCEL TEMPE			CHARTPANE · ····	
🛱 Active Exhibit	or Leads 🖌					Search for records	
First Name	Last Name	│ Company Name ↑	Title	Email	Phone	Lead Rating Notes	TO C
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		Charts
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		
Tim	Jones	Acme Co.	СМО	tim@email.com	404-555-1212		Ð
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		Ê
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		00
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		

 The Exhibitor Leads can be exported to Excel by utilizing the Export to Excel function. See <u>Export Data to Excel</u> for more information.

	EVENTS 365		-Events 🗸 🛛	Exhibitor Leads >		∇ + \mathcal{O} \mathcal{A}	(?]
NEW <u> </u> DELETE – 🛪	EMAIL A LINK 🔍 🗸 🖓	FLOW - PRUN REPORT	EXCEL TEMPLA	ATES 👻 🔍 EXPORT TO EXCEL	 IMPORT DAT. 	A 👻 📲 CHART PANE 🍷 🚥	
-¤ Active Exhibi	tor Leads 👻					Search for records	Q
🗌 First Name	Last Name	│ Company Name ↑	Title	Email	Phone	Lead Rating Notes	Y O K
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		Charts
Jeff	Cross	2B Solutions	CEO	jeff@2bsolutions.net	205-408-9991		
Tim	Jones	Acme Co.	смо	tim@email.com	404-555-1212		Ð
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		
Susan	Johnson	Acme Co.	CFO	susan@email.com	703-555-1212		000

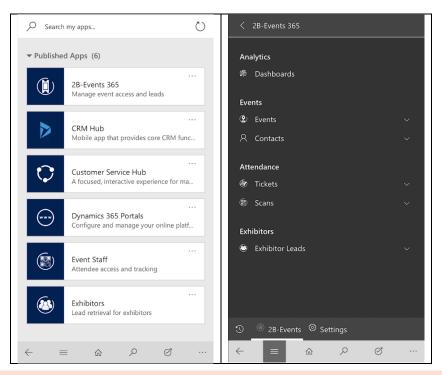
4. An Excel spreadsheet will be created.

	5 ¢	÷			A	ctive Exhib	itor Leads 1	11-29-201	8 11-27-54 AM [Prote	ected View] - Excel		Tiffany Lisowsk	— •	o x
	Home	Insert Draw	Page Layout	Formulas	Data	Review	View	Team	🖓 Tell me what yo					
🚺 PRO	DTECTED VIEW	Be careful—files from	the internet can o	ontain viruses. U	Jnless you r	need to edi	t, it's safer t	to stay in	Protected View.	nable Editing				×
A1	· ·	$\times \checkmark f_x$	(Do Not Modif	y) Exhibitor Le	ad									~
1	D		E	F			G		н	1	J		к	
	t Name	💌 Last Name		Company Nan	ne 🔽	Title			Email	Phone	💌 Lead Rating	 Notes 		
2 Jeff		Cross		2B Solutions		CEO			jeff@2bsolutions.ne					
3 Jeff		Cross		2B Solutions		CEO			jeff@2bsolutions.ne	t 205-408-9991				
4 Tim		Jones		Acme Co.		CMO			tim@email.com	404-555-1212				
5 Susa	an	Johnson		Acme Co.		CFO			susan@email.com	703-555-1212				
6 Susa	an	Johnson		Acme Co.		CFO			susan@email.com	703-555-1212				
7 Susa	an	Johnson		Acme Co.		CFO			susan@email.com	703-555-1212				
8														
9														
10														
11														
12														
13														
14														
15														

NAVIGATING THE 2B-EVENTS 365 MOBILE APPLICATION FOR ADMINISTRATORS

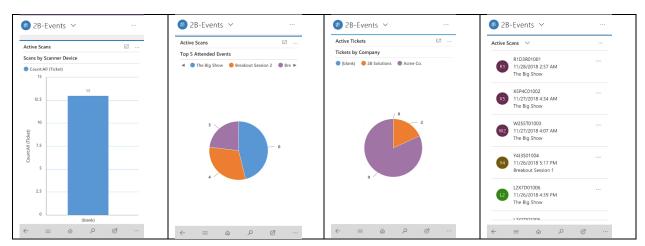
The mobile application for 2B-EVENTS 365 Administrators shows most of the same information available in the core application. This information includes Dashboards, Events, Tickets, Scans and Exhibitor info.

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



DASHBOARDS

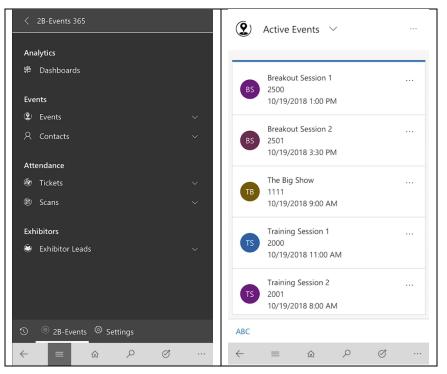
1. Under Dashboards, the user can see analytics relating to Scans by Device, Active Scans, Tickets by Company and Active Scans by scrolling down the page.



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

EVENTS

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

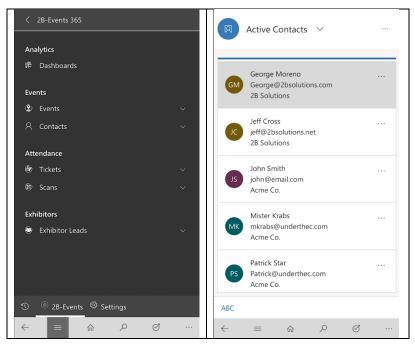


2. A new Event can be added by pressing ... and choosing +NEW. A blank Event form will appear. Enter information for Event and Save.

9)	Active Events $~$		EVENT New Event	
:=	Select		E General Timeline	
î↓	Sort		Title *	
Q	Search			
R	Show Chart		Event Code	
Ŧ	New		 Event Time	
Û	Delete	>		Ŀ
Ö	Refresh		Location 1	
M	Email a Link	>	Location 2	
⊳∕ ^a	Flow	>		
X	Excel Templates	>	Restricted No	
Ø	Export to Excel	>	Access Code	
	Training Session 2			
TS				
	10/19/2018 8:00 AM		Company	
ABC			Company Code	
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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.

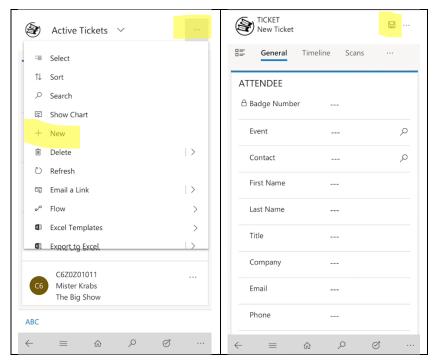
R	Active Contacts $~~$		Contact: 2B-Even V 🔡
. *=	Select		E Summary Timeline …
ĵ.	Sort		Owner * O & Tiffany Lis A
۶	Search		
- -	Show Chart		
+	New		CONTACT INFORMATION
Û	Delete	>	First Name *
C	Refresh		
De	Email a Link	>	Middle Name
^	' Flow	>	Last Name *
X	Excel Templates	>	First Name *
1	Export to Excel	>	
	Patrick Star		Last Name *
P	Patrick@underthec.com		Job Title
	Acme Co.		Account Name O
ABC			Account Name
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TICKETS

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

 ∠ 2B-Events 365 	🔄 Active Tickets 🗸 …
Analytics	
帶 Dashboards	S6W8Y01009
Events	56 Sandy Cheeks The Big Show
${ label{eq:states}}$ Events \checkmark	
A Contacts ∨	R1D3R01001 Jeff Cross
Attendance	The Big Show
🕙 Tickets 🗸 🗸	Х5Р4С01002
🕲 Scans 🗸 🗸	X5 Susan Johnson The Big Show
Exhibitors	\$9\$5W01005
left \sim Exhibitor Leads \sim	S9 Tim Jones The Big Show
	C6Z0Z01011 Mister Krabs The Big Show
🕚 🐵 2B-Events 🍄 Settings	ABC

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.

	Active Tickets	~	 TICKE W2S5	T T01003	+ …	TICKET W2SST01003	+ …
			∃≣ Gene	eral Timeline Scan	is ···	E General Event Badge	
_	The Big Show			Event Badge	_		ß
59	S9S5W01005 Tim Jones The Big Show		 ATTENDI	Related - Common		File Edit Filter	@Help ▼
C6	C6Z0Z01011 Mister Krabs The Big Show		 Event Contact	 Documents 옷 Connections 窗 Exhibitor Leads 	ρ	Id < 1 or 27 > ⊳I Tiffany Lisowski	
W2	W2S5T01003 Tiffany Lisowski The Big Show		 First Na Last Nar	窗 Scans		Sales Manager 205-408-9991 tiffany@2bsolutions.	com
L2	L2L1X01007 George Moreno		 Title	Sales Ma	nager	W255T01003	
	The Big Show		Compan	ny Acme Co).		
Y4	Y4J3S01004 John Smith		 Email	tiffany@	2bsolu 🖙		
ABC			Phone	205-408-	-9991 🕓		
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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.

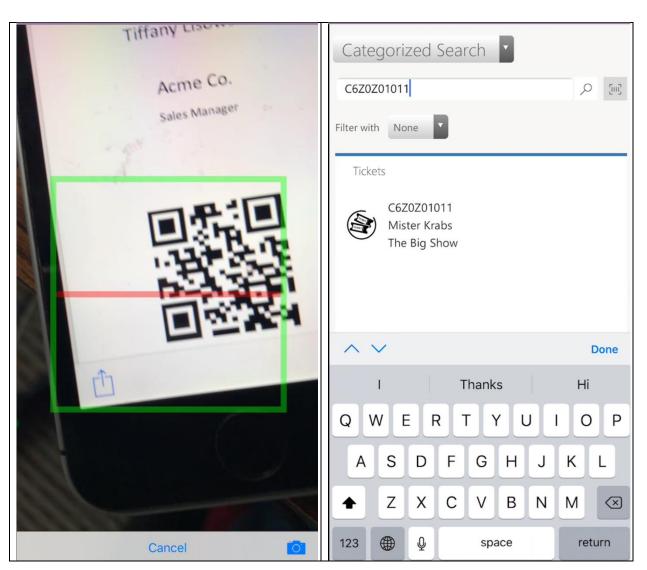
1. Log into your Dynamics 365 Mobile App. Navigate to 2B-Events 365 then Tickets.

Search my apps	< 2B-Events 365
• Published Apps (6)	Analytics
2B-Events 365 Manage event access and leads	罪 Dashboards
	Events
CRM Hub	Events
Mobile app that provides core CRM func	\aleph Contacts \checkmark
Customer Service Hub A focused, interactive experience for ma	Attendance
 Dynamics 365 Portals Configure and manage your online platf	Scans Exhibitors
Event Staff Attendee access and tracking	Exhibitor Leads
Exhibitors Lead retrieval for exhibitors	
	🕚 💿 2B-Events 🎬 Settings
← ≡ क़ ,	

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

Categorized Search Search Dynamics 365 data ρ filter with None	
∧ ∨ Done	
I Thanks Hi	
QWERTYUIOP	
ASDFGHJKL	
◆ Z X C V B N M <	
123 🔮 👰 space return	Cancel O

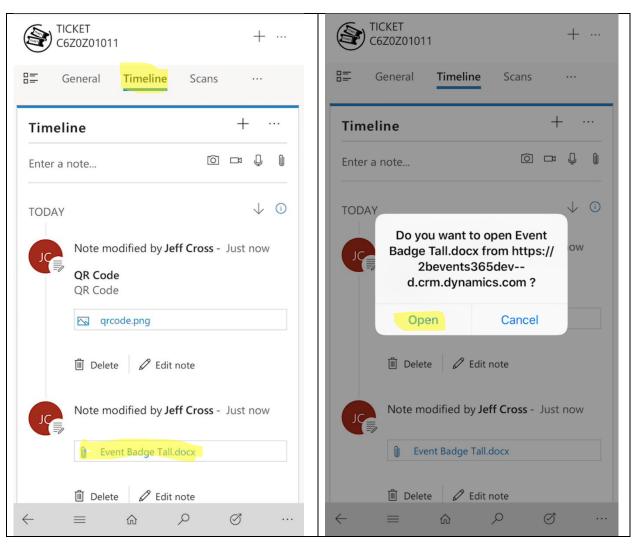
3. Scan the QR Code on the ticket to bring up the ticket record.



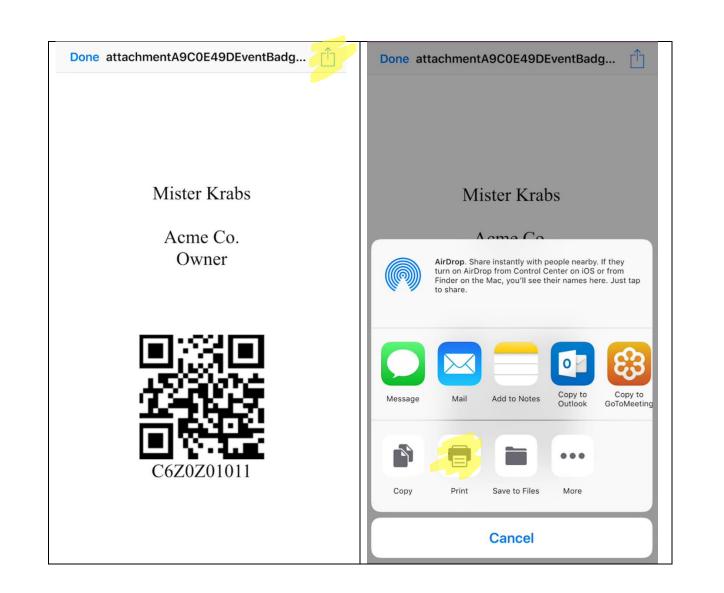
4. Click on the ticket record to open.

Categorized Search	(L	TICKET C6Z0Z01011	+	
C6Z0Z01011		General Timelir	ne Scans …	
Filter with None	A	TTENDEE		
Tickets		Badge Number	C6Z0Z01011	
C6Z0Z01011 Mister Krabs		Event	(2) The Big Sh	Q
The Big Show		Contact	🛛 Mister Krabs	Q
		First Name	Mister	
A X/	Done	Last Name	Krabs	
I Thanks	Hi	Title	Owner	
Q W E R T Y U I	0 P	Company	Acme Co.	
ASDFGHJK	(L	Email	mkrabs@under	
★ Z X C V B N M	1 🙁	Phone	836-555-5555	S
123 💮 👰 space	return ←	≡ ŵ	\$ S	

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.*)

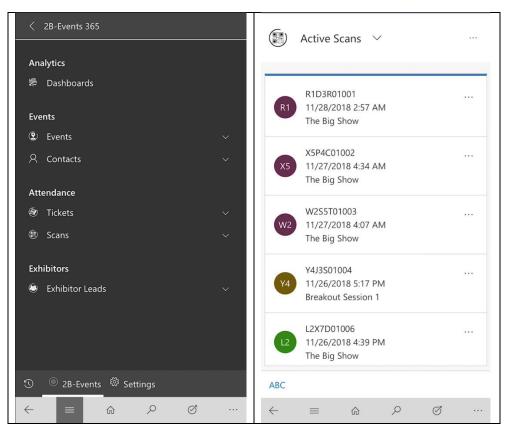


7. Select the appropriate printer and then PRINT.

rinter Select Printer Copy - + ange All Pages >	HP LaserJet 400 color M451dn (6020A 🤇
	HP LaserJet 400 color M451dn (6020A
ange All Pages >	
Mister Krabs Acree Co.	
🧭 Page 1	

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.

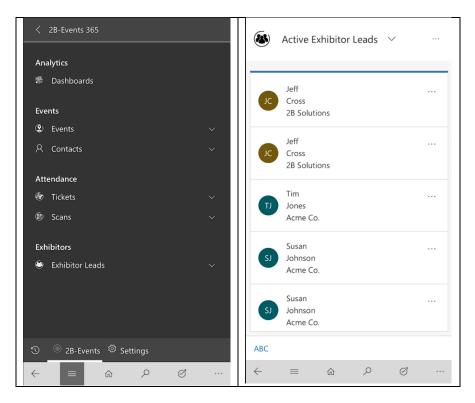
	Active Scans \checkmark		SCAN New Scan
. ∵≣	Select		∃ ≕ Scan Timeline
î↓	Sort		DETAILS
Q	Search		Badge ID *
- R	Show Chart		
+	New		Ticket ,O
Ĩ	Delete	>	Scan Time
Ö	Refresh		©
N	Email a Link	>	Owner * ◎ ♀ Tiffany Lis ♪
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×	Export to Excel		ATTENDEE
			First Name
L2	L2X7D01006 11/26/2018 4:39 PM		Last Name
	The Big Show		
ABC			Title
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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.

SCAN New Scan				SCAN X5P4C01	1002		+ …
i Save & Close 十 New				Scan	Timeline	Related	
SCAN BARCODE			DET	TAILS			
⊿″ Flow		>	В	adge ID	*	X5P4C01002	
Ticket		Q	Т	ïcket		X5P4C010	002 $ ho$
Scan Time		Ē.	S	ican Time		11/26/2018 3:43 PM	Ē
Owner	* O 🎗 Tiffai	ny Lis 🔎	C	Owner	*	◎ ႙ Jeff Cro	ss D
ATTENDEE			ATT	TENDEE			
First Name			F	irst Name		Susan	
Last Name			L	ast Name		Johnson	
Title			Т	ïtle		CFO	
$\leftarrow \equiv \square$	Q	Ø	\leftarrow	=	ŵ	<u>ب</u>	3

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.

(23)	Active Exhibitor Leads $~~$		EXHIBITOR LEAD New Exhibitor Lead
·=	Select		E Lead
î↓	Sort		ATTENDEE
Q	Search		First Name *
R	Show Chart		
+	New		Last Name *
Û	Delete	>	Title
Ö	Refresh		
2	Email a Link	>	Company Name •
⊳⁄¤	Flow	>	Email +
×	Excel Templates	>	Phone +
X	Export to Excel	>	
	<i>.</i>		Name +
SJ	Susan Johnson		Owner * © 8 Tiffany Lis 🔎
	Acme Co.		
ABC			Event O
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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 Lea	ad		EXHIBIT Susan J	OR LEAD ohnson		+ …
ave & Close + New			E Lead	Related		
SCAN BARCODE			ATTENDEE			
⊳⁄ª Flow		>	First Nam	e +	Susan	
Last Name	+		Last Name	•	Johnson	
Title			Title		CFO	
Company Name	+		Company	Name *	Acme Co.	
Email	+		Email		susan@email.c	
Phone	+		Phone	.+	703-555-1212	S
Name	+		Name		Susan Johnson	
Owner	* ^②	s ,0	Owner	*	◎ ႙ Jeff Cross	م
Event		Q	Event		The Big Sh	م .
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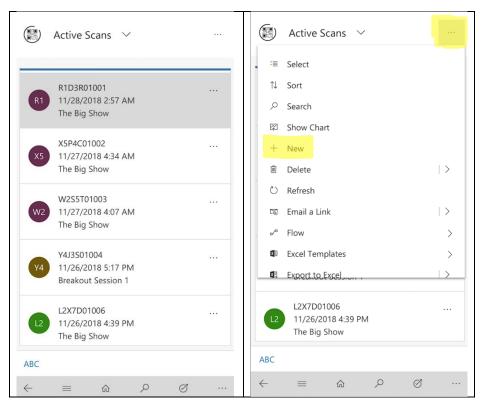
2B-EVENTS MOBILE APP FOR EVENT STAFF

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.

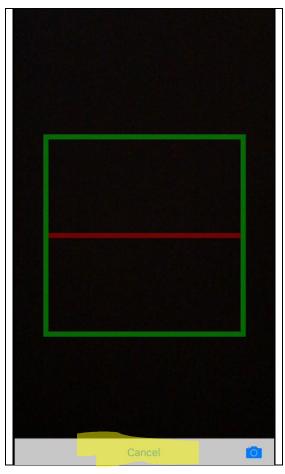
1. After logging into your Dynamics 365 mobile application, select the Event Staff application.

Search my apps	< Event Staff
▼ Published Apps (6)	Scans
 2B-Events 365 Manage event access and leads	🕲 Scans 🗸 🗸
CRM Hub Mobile app that provides core CRM func	
Customer Service Hub A focused, interactive experience for ma	
Dynamics 365 Portals Configure and manage your online platf	
Event Staff Attendee access and tracking	
Exhibitors Lead retrieval for exhibitors	
	Scanning
$\leftarrow \equiv \ \ \ \ \ \ \ \ \ \ \ \ \$	← ≡ ⋒

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.

SCAN New Scan		L	SCAN New Scar	ı		
E Scan Tin	meline		∃≡ Scan	Timeline		
DETAILS			DETAILS			
Event	* 😟 The Bi	g× ,0	습 Event	* (오 The Big	Show
Lock Event	No No		Lock Event		Yes	
Badge ID	*		Badge ID	* _		
Ticket		Q	Ticket			Q
Scan Time		Ē	Scan Time	-		Ē.
Owner	* © ႙ Tiffa	any Lis 🔎	Owner	* ⊙) ス Tiffan	y Lis 🔎
ATTENDEE			ATTENDEE			
First Name			First Name			
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- 5. The device camera will open allowing the QR Code to be scanned. The form will autopopulate 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.

		SCAN New Scan		.
		E Scan Tin	meline	
		DETAILS		
		Event	* 😟 The Big	s × ,0
		Lock Event	No No	
		Badge ID	*	
		Ticket		Q
		Scan Time		Ē
		Owner	* © 只 Tiffan	y Lis ,O
		ATTENDEE		
		First Name		
Cancel	()	\leftarrow =	<u>م</u> ک	Ø

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.

SCAN New Scan					Loo	k for Event		\checkmark	×
E Scan	Timeline				٢	The Big Show $ imes$			
DETAILS			_		Lo	ok for Event			Q
Event	*	(The Big	g S ×	ρ	٢	Breakout Session 1 2500			\sim
Lock Event	(No No			٢	Breakout Session 2 2501			\sim
Badge ID	*				٢	Training Session 1			\sim
Ticket				Q	٤	2000			Ŷ
Scan Time			_	Ē 9	٢	Training Session 2 2001			\sim
Owner	* @	ා උ Tiffa			٢	Vendor Expo 3000			\sim
						- New	୍	Change	View
ATTENDEE									
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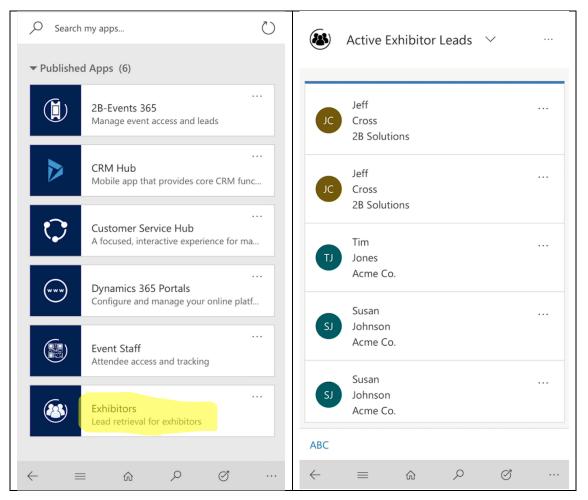
8. Select the new Event. Toggle Lock Event to YES and continue scanning tickets for the new Event as instructed above.

SCAN New Scan			SCAN New Scan	ı	
B= Scan Ti	meline		Scan	Timeline	
DETAILS			DETAILS		
Event	* 😟 Breakou	t× ,0	🛆 Event	* 😢 Breal	kout Ses
Lock Event	No No		Lock Event	Yes	
Badge ID	*		Badge ID	*	
Ticket		Q	Ticket		Q
Scan Time		 • 	Scan Time		Ċ
Owner	* ☉ ႙ Tiffan	y Lis 🔎	Owner	* © ႙ Tif	fany Lis 🔎
ATTENDEE			ATTENDEE		
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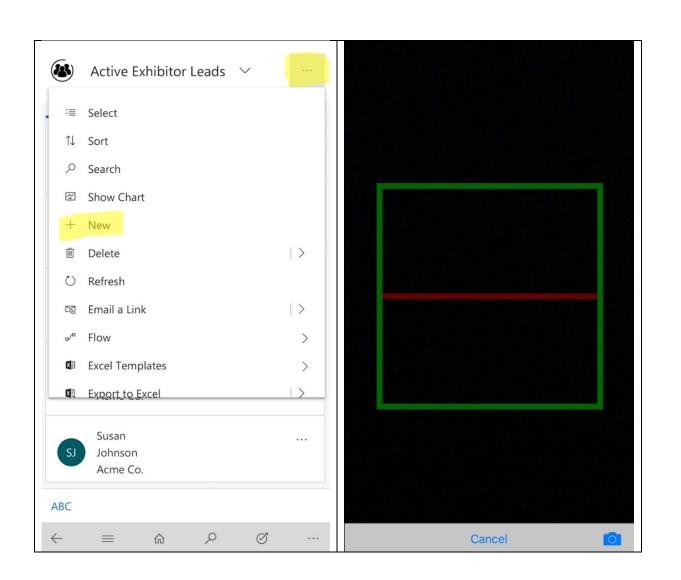
2B-EVENTS MOBILE APP FOR EXHIBITORS

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.
- Lead information can be retrieved either by exporting the information from 2B-EVENTS 365 in .CSV format (see <u>VIEW EXHIBITOR LEADS</u>) or by using the optional web portal (see <u>OPTIONAL WEB PORTAL FOR EXHIBITORS</u>).

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 <u>2B-EVENTS APP FOR EXHIBITORS</u>.

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

Create or Edit Dashboards

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-editdashboards

Create and Edit Fields (Attributes)

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-editfields

Create and Design Forms

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/createdesign-forms

Create and Edit Views

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-editviews

Create Connections to Define and View Relationships Between Records

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/createconnections-view-relationships-between-records

Set up Dynamics 365 (online) to use SharePoint

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

Set up OneNote Integration

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-uponenote-integration-in-dynamics-365

Dynamics 365 App for Outlook User Guide

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

Word Templates within Dynamics 365

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/using-wordtemplates-dynamics-365

Excel Templates within Dynamics 365

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/analyze-yourdata-with-excel-templates

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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.



NGHAM, AL 35201 05.408.9991 2BS0LUTIONS.COM

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