



# 2B-EVENTS 365 USER GUIDE

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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

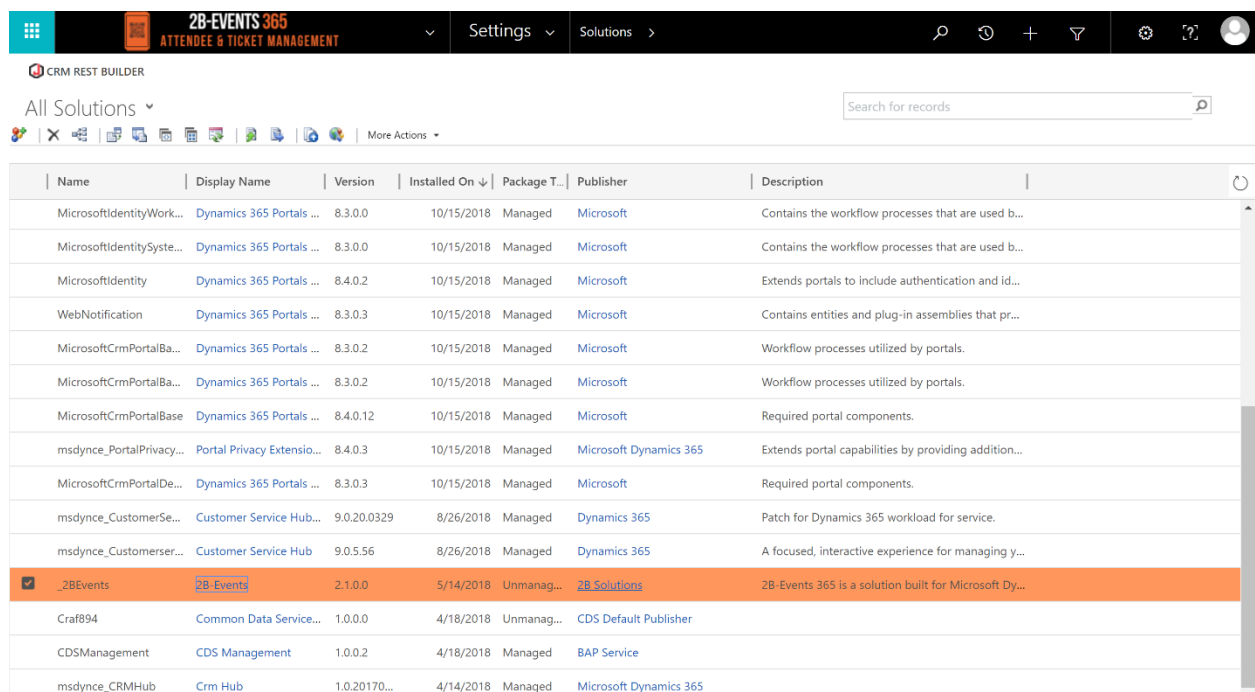
**To Install:** Save the files to your desktop and import the .zip file into your Dynamics 365 instance by choosing Settings/Solutions/Import. Once the solution completes the import, choose Publish All Customizations from the ribbon bar and continue with the instructions in the document to configure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

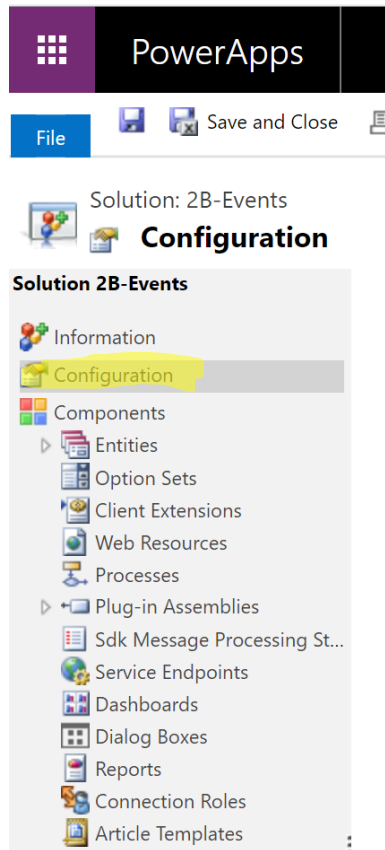
In Dynamics 365, navigate to Settings/Solutions and open the entry called **\_2BEvents**.



The screenshot shows the Dynamics 365 interface. At the top, there's a navigation bar with 'Settings' and 'Solutions' tabs. Below it, the 'All Solutions' list is displayed. The table has columns: Name, Display Name, Version, Installed On, Package T..., Publisher, and Description. The row for '\_2BEvents' is highlighted in orange, indicating it is the selected solution.

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

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



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

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

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

PowerApps

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

Solution: 2B-Events

**Configuration**

Solution 2B-Events

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

2B Solutions  
Be Mobile. Be Connected.

Solution Version: 2.1.0.0

Refresh Page

**License Registration**

Token Key ?  
hpz4IM6FvelYnnBSStBJRN1XesvYr4zVBal5rB9hbVw=

License Type: Trial

Licensed Users: 5

Expiration Date: Tue Jan 01 2019

Update

**Solution Configuration**

**Users**

Status: Existing

## Step 2. Solution Configuration

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

PowerApps

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

Solution: 2B-Events

**Configuration**

Solution 2B-Events

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

**License Registration**

Token Key ?  
hpz4IM6FvelYnnBSStBJRN1XesvYr4zVBal5rB9hbVw=

License Type: Trial

Licensed Users: 5

Expiration Date: Tue Jan 01 2019

Update

**Solution Configuration**

Configure

**Users**

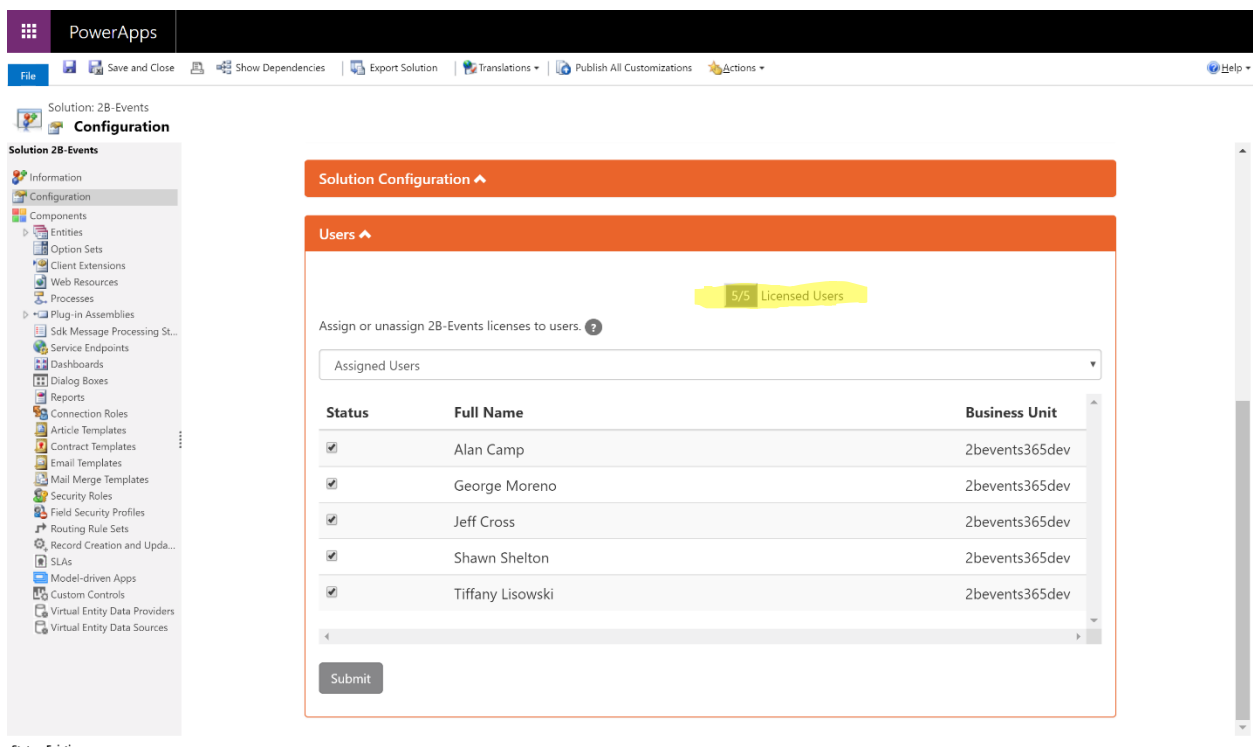
Select Solution Configuration and then select the **Configure** button.

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

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

### Step 3. Users

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



The screenshot shows the PowerApps Solution Configuration interface. The left sidebar lists various solution components, with 'Configuration' selected. The main area displays the 'Users' section for 'Solution 2B-Events'. At the top, a yellow label indicates '5/5 Licensed Users'. Below this, a dropdown menu is set to 'Assigned Users'. A table lists five users, each with a checkbox in the 'Status' column and their 'Business Unit'.

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

A 'Submit' button is located at the bottom left of the Users section.

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

PowerApps

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

Solution: 2B-Events  
Configuration

Solution 2B-Events

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

Status: Existing

Solution Configuration ^

Users ^

5/5 Licensed Users

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

All Users

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

Submit

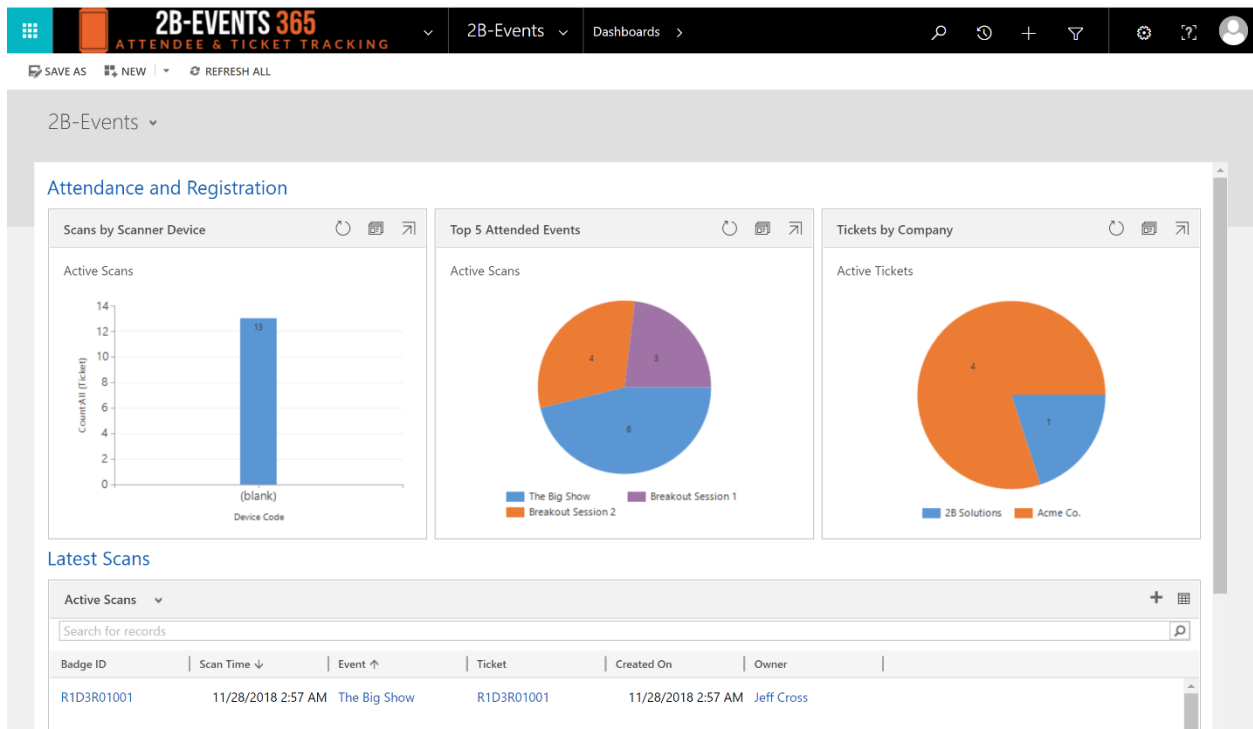
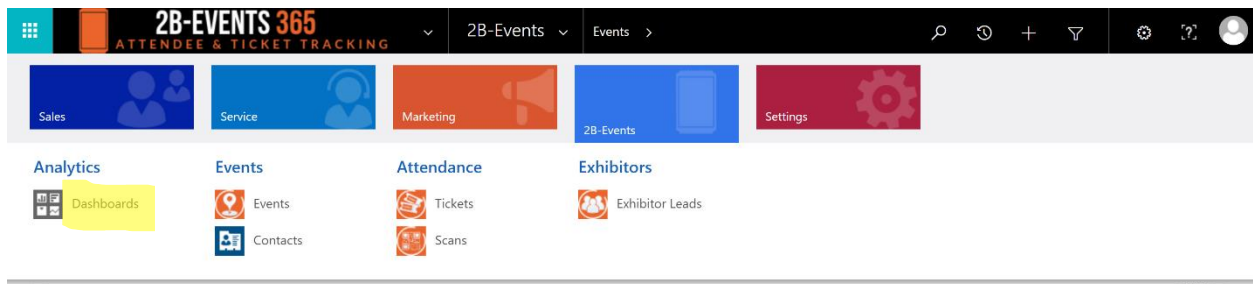
License Registration, Solution Configuration and Users Complete!

# 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](#).

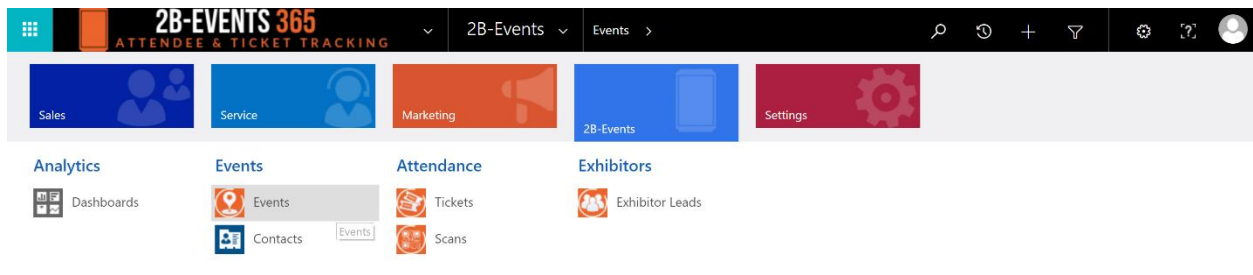
To Navigate to the 2B-Events Dashboard, go to 2B-EVENTS → Analytics → Dashboards



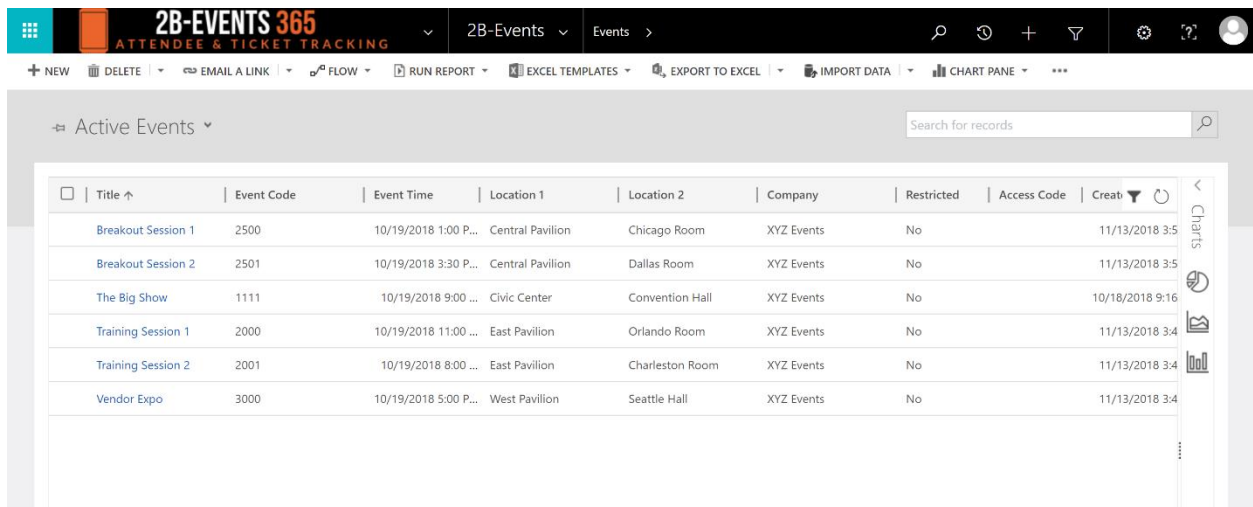
## EVENTS

### CREATING NEW EVENTS

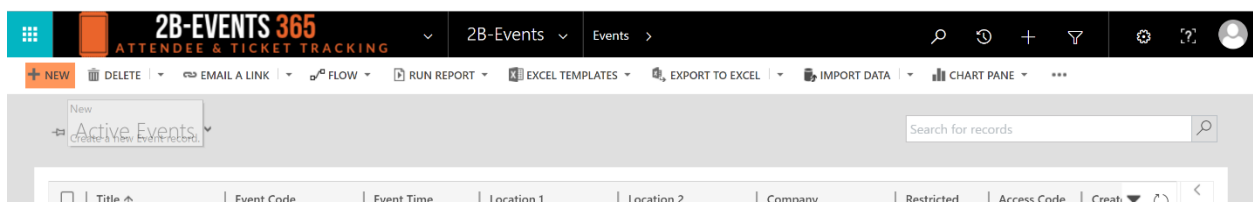
1. To navigate to Events, go to 2B-EVENTS → Events



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

Access Code

Company

Company Code

Owner \*

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
<div> <div>Created On</div> <div>Modified On</div> <div>Modified By</div> </div>								

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 \*

Event Time

General

Title \*

Event Code

Event Time

Location 1

Location 2

Restricted

Access Code

Company

Company Code

Owner \*

ACTIVITIES

NOTES

Enter a note

Related Events

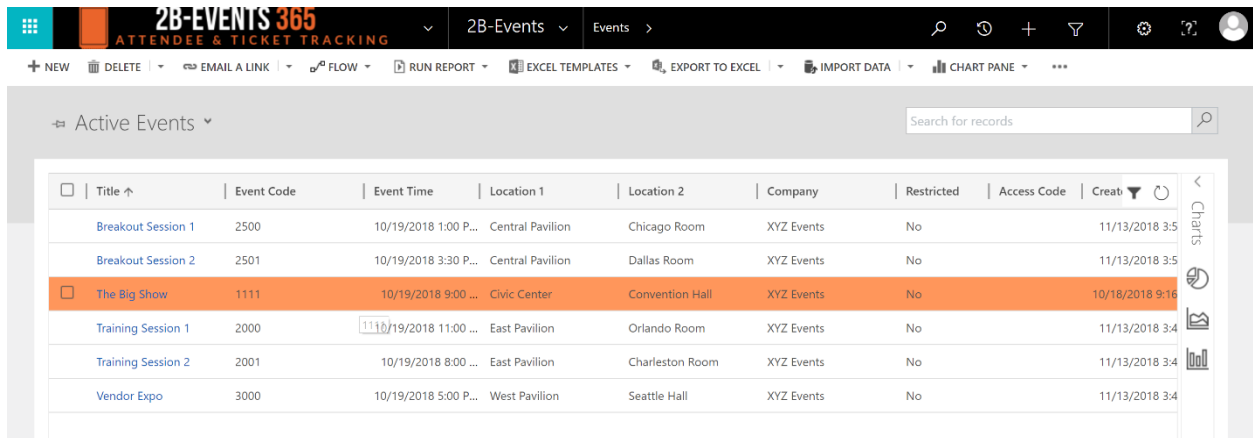
Title ↑	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Breakout Session 1	2500	10/19/2018 1:00 ...	Central Pavilion	Chicago Room	XYZ Events	No		11/13/2018 3:51 ...
Breakout Session 2	2501	10/19/2018 3:30 ...	Central Pavilion	Dallas Room	XYZ Events	No		11/13/2018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

Active

## CREATING RELATED EVENTS (SUB-EVENTS)

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

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



2B-EVENTS 365 ATTENDEE & TICKET TRACKING

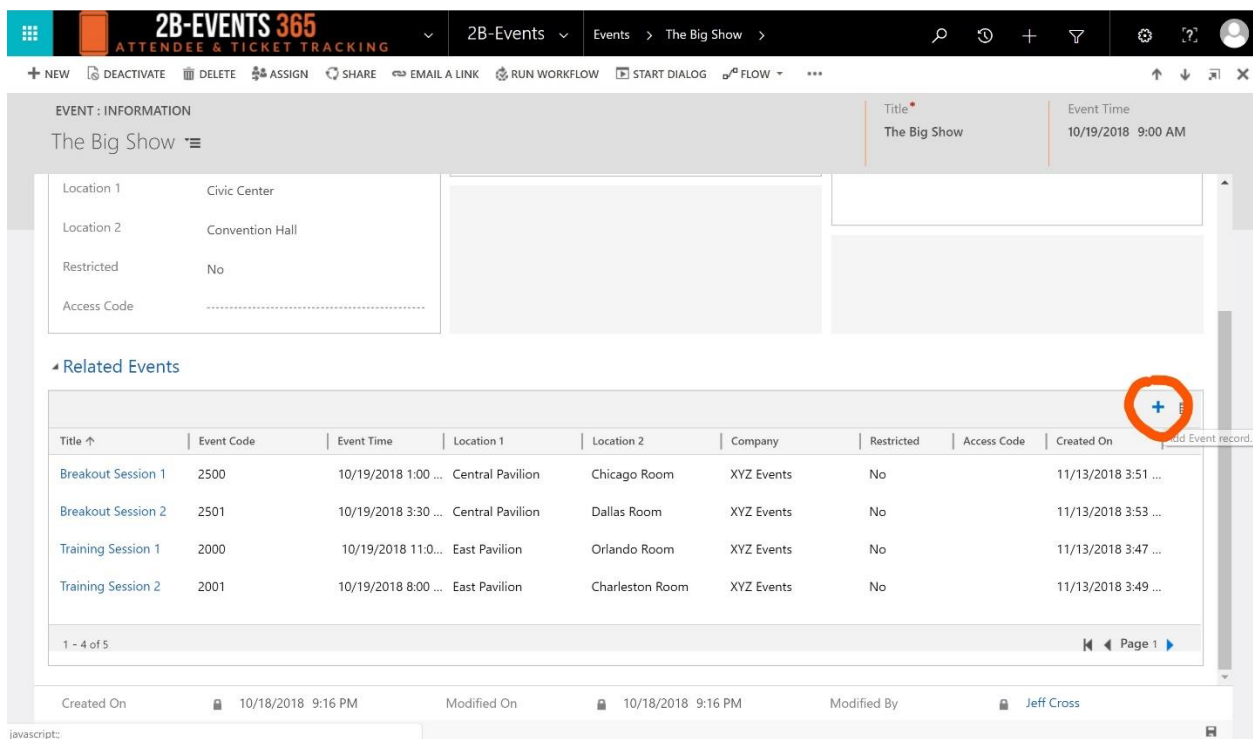
2B-Events > Events >

Active Events

Search for records

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

2. Scroll down to Related Events and click +.



2B-EVENTS 365 ATTENDEE & TICKET TRACKING

2B-Events > Events > The Big Show >

EVENT : INFORMATION

The Big Show

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

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

Related Events

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

1 - 4 of 5, Page 1

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

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

**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events > Events > The Big Show

EVENT : INFORMATION  
The Big Show

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

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

Related Events

Title	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Breakout Session 1 2500		10/19/2018 1:00 PM						
Breakout Session 2 2501		10/19/2018 3:30 PM						
Training Session 1 2000		10/19/2018 11:00 AM						
Training Session 2 2001		10/19/2018 8:00 AM						
Vendor Expo 3000		10/19/2018 5:00 PM						

5 results

Active

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

**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events > Events > The Big Show

EVENT : INFORMATION  
The Big Show

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

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

Related Events

Title	Event Code	Event Time	Location 1	Location 2	Company	Restricted	Access Code	Created On
Breakout Session 1 2500		10/19/2018 1:00 PM						
Breakout Session 2 2501		10/19/2018 3:30 PM						
Training Session 1 2000		10/19/2018 11:00 AM						
Training Session 2 2001		10/19/2018 8:00 AM						
Vendor Expo 3000		10/19/2018 5:00 PM						

5 results

+ New

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

**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events > Events > New Event

EVENT : INFORMATION  
The Big Show

Location 1  
Location 2  
Restricted  
Access Code

Related Events

Title ↑

Breakout Session 2  
Training Session 1  
Training Session 2

1 - 4 of 5

Created On

Active

EVENT : INFORMATION  
New Event

General

Title \*

Event Code

Event Time

Location 1

Location 2

Restricted No

Access Code

Company XYZ Events

Company Code 2222

Owner \* Tiffany Lisowski

ACTIVITIES

NOTES

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

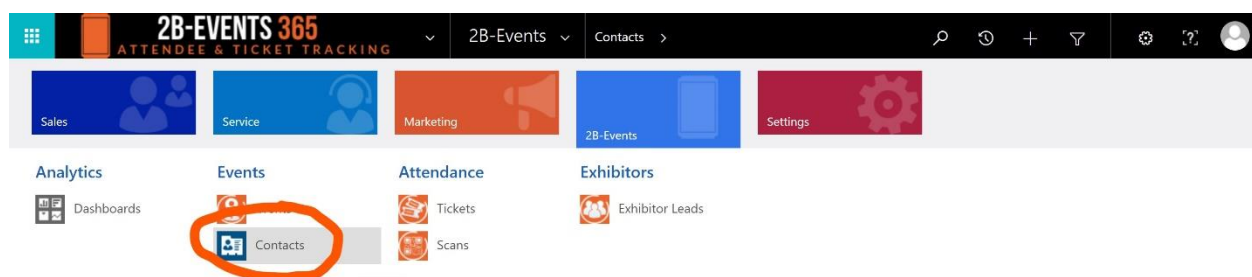
Created On Modified On Modified By

## 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.

The screenshot shows the '2B-EVENTS 365 ATTENDEE & TICKET TRACKING' application. The top navigation bar includes '2B-Events' and 'Contacts'. Below the navigation bar, there's a search bar and a list of contacts. The contacts are displayed in a table with columns: Full Name, Email, Company Name, and Business Phone.

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

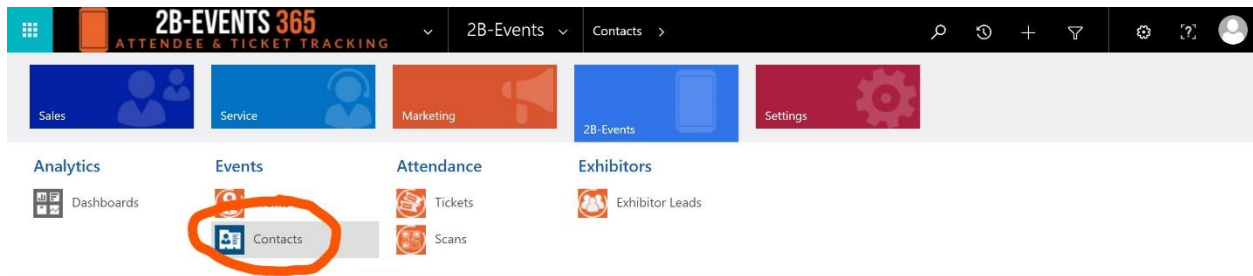
At the bottom of the table, it says '1 - 13 of 13 (0 selected)' and 'Page 1'.

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

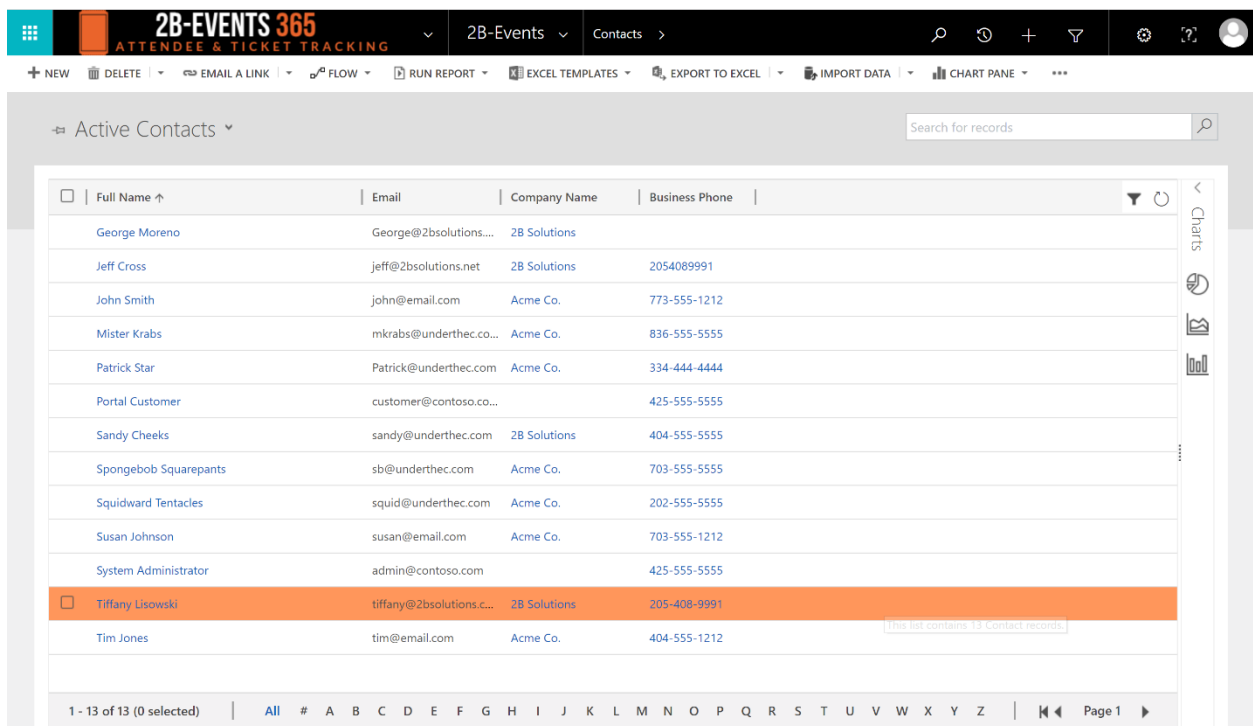
The screenshot shows the '2B-EVENTS 365 ATTENDEE & TICKET TRACKING' application in the 'New Contact' form. The form is divided into several sections: 'CONTACT INFORMATION', 'POSTS', 'ASSISTANT', 'ACTIVITIES', 'NOTES', 'TICKETS', and 'RECENT OPPORTUNITIES'. The 'CONTACT INFORMATION' section is currently active and contains fields for Full Name, First Name, Last Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, Fax, Preferred Method of Contact, and Address. The 'NOTES' section is empty and contains a message: 'There aren't any notes to show. To get started, enter a note.' The 'TICKETS' section is also empty and contains a message: 'To enable this content, create the record.' The 'RECENT OPPORTUNITIES' section is empty and contains a message: 'To enable this content, create the record.'

## VIEW EXISTING CONTACTS

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



2. Double-click on the Contact record.



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

**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events > Contacts > Tiffany Lisowski

OWNER: SYSTEM

**Summary**

**CONTACT INFORMATION**

Full Name: Tiffany Lisowski  
 First Name: Tiffany  
 Last Name: Lisowski  
 Job Title: VP of Sales  
 Account Name: 2B Solutions  
 Email: tiffany@2bsolutions.com  
 Business Phone: 205-408-9991  
 Mobile Phone:   
 Fax:   
 Preferred Method of Contact: Any  
 Address:

**POSTS** **ASSISTANT** **ACTIVITIES** **NOTES**

Enter a note

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

**TICKETS**

Badge Number	Contact
W255T01003	Tiffany Lisowski

Company: 2B Solutions

**RECENT OPPORTUNITIES**

Topic	Est. Revenue	Est. Cl
-------	--------------	---------

## TICKETS

### CREATING NEW TICKETS

1. Navigate to 2B-EVENTS → Tickets

**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events > Tickets

**Sales** **Service** **Marketing** **2B-Events** **Settings**

**Analytics** **Events** **Attendance** **Exhibitors**

Dashboards Events Tickets Scans Exhibitor Leads

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





**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events Tickets > New Ticket

SAVE SAVE & CLOSE NEW FLOW FORM EDITOR

TICKET : INFORMATION  
New Ticket

Badge Number Scanned  
No

ATTENDEE	QR CODE	SCANS
Badge Number Event Contact First Name Last Name Title Company Email Phone Access Code	QR Code Data ACTIVITIES NOTES There aren't any notes to show. To get started, enter a note.	Scanned Scan Count Owner Tiffany Lisowski

LOCATION

Section  
Row  
Seat

Created On Modified On Modified By  
Active

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

**2B-EVENTS 365**  
ATTENDEE & TICKET TRACKING

2B-Events Tickets > TOP4Y01013

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

TICKET : INFORMATION  
TOP4Y01013

Badge Number Scanned  
TOP4Y01013 No

ATTENDEE	QR CODE	SCANS
Badge Number Event Contact First Name Last Name Title Company Email Phone Access Code	QR Code Data ACTIVITIES NOTES Enter a note	Scanned Scan Count Owner Tiffany Lisowski

LOCATION

Section  
Row  
Seat



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

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

The screenshot displays the 2B-Events 365 Attendee & Ticket Tracking web application. The top navigation bar includes the logo, event name '2B-Events', and a breadcrumb trail 'Tickets > TOP4Y01013'. A toolbar with various icons is located below the navigation bar. The main content area is divided into several sections:

- TICKET : INFORMATION**  
TOP4Y01013
- ATTENDEE**

Badge Number	TOP4Y01013
Event	The Big Show
Contact	John Smith
First Name	John
Last Name	Smith
Title	CIO
Company	Acme Co.
Email	john@email.com
Phone	773-555-1212
Access Code	
- QR CODE**

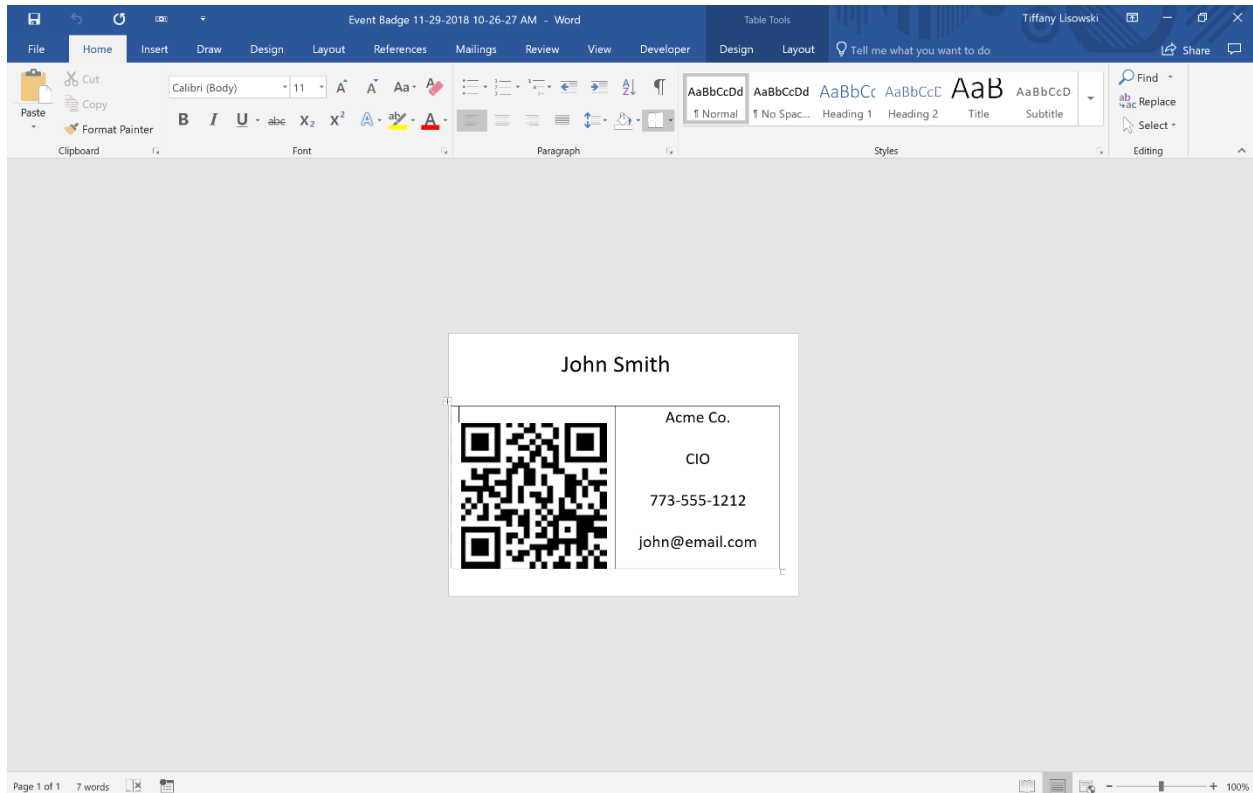

QR Code Data ivBORw0KGgoAAAANSUHEUgA
- ACTIVITIES**  
Enter a note
- NOTES**  

- SCANS**

Scanned	No
Scan Count	0
Owner	Tiffany Lisowski
- LOCATION**

Section	
Row	
Seat	

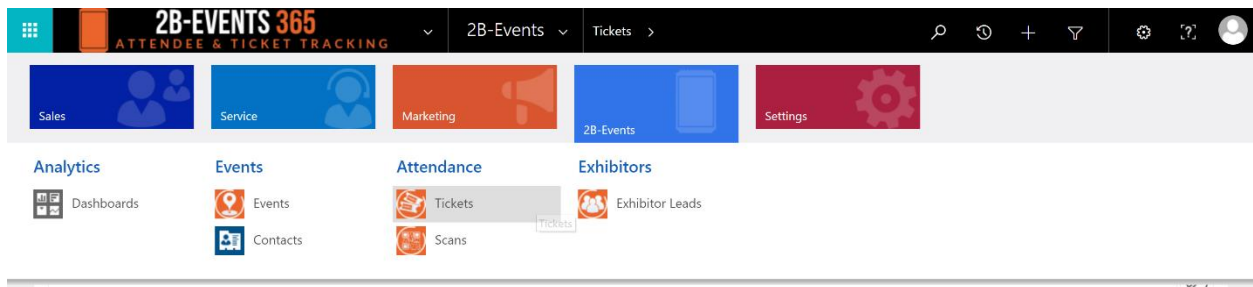
The bottom status bar shows the ticket was created on 11/29/2018 at 10:21 AM, modified on 11/29/2018 at 10:22 AM, and modified by Tiffany Lisowski. The ticket status is 'Active'.

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.

2B-EVENTS 365

ATTENDEE & TICKET TRACKING

2B-Events

Tickets

NEW

DELETE

EMAIL A LINK

FLOW

RUN REPORT

EXCEL TEMPLATES

EXPORT TO EXCEL

IMPORT DATA

CHART PANE

Active Tickets

<input type="checkbox"/>	Badge Number	Contact	Event	Scanned	First Name	Last Name ↑	Job Title	
	S6W8Y01009	Sandy Cheeks	The Big Show	No	Sandy	Cheeks	Karate Instructor	2B Solut
	R1D3R01001	Jeff Cross	The Big Show	Yes	Jeff	Cross	CEO	2B Solut
	X5P4C01002	Susan Johnson	The Big Show	Yes	Susan	Johnson	CFO	Acme C
	S9S5W01005	Tim Jones	The Big Show	Yes	Tim	Jones	CMO	Acme C
	C6Z0Z01011	Mister Krabs	The Big Show	No	Mister	Krabs	Owner	Acme C
<input checked="" type="checkbox"/>	W2S5T01003	Tiffany Lisowski	The Big Show	Yes	Tiffany	Lisowski	VP of Sales	Acme C
	L2L1X01007	George Moreno	The Big Show	No	George	Tiffany Moreno	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

1 - 12 of 12 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Page 1

Charts

3. Changes can be made from the Ticket record.

2B-EVENTS 365

ATTENDEE & TICKET TRACKING

2B-Events

Tickets > W2S5T01003

NEW

DEACTIVATE

DELETE

PROCESS

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

TICKET : INFORMATION

W2S5T01003

Badge Number

W2S5T01003

Scanned

Yes

ATTENDEE

Badge Number

W2S5T01003

Event

The Big Show

Contact

Tiffany Lisowski

First Name

Tiffany

Last Name

Lisowski

Title

Sales Manager

Company

Acme Co.

Email

tiffany@2bsolutions.com

Phone

205-408-9991

Access Code

QR CODE

QR Code Data

iVBORw0KGgoAAAANSUgUgA

ACTIVITIES

NOTES

Enter a note

Event Badge.docx

Jeff Cross - Yesterday 5:06 AM

QR Code

QR Code

qrcode.png

Jeff Cross - 11/27/2018 4:05 AM

SCANS

Scanned

Yes

Scan Count

1

Owner

Jeff Cross

LOCATION

Section

Row

Seat

Created On

10/17/2018 5:29 PM

Modified On

11/29/2018 10:51 AM

Modified By

Tiffany Lisowski

Active

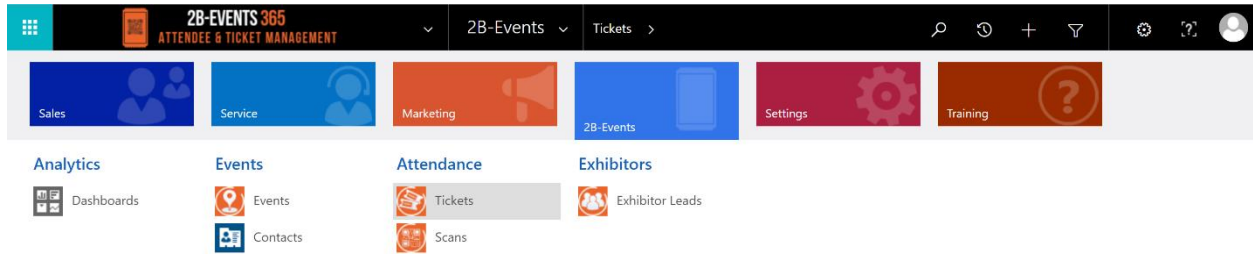
BULK PRINT ACTIVE TICKETS

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

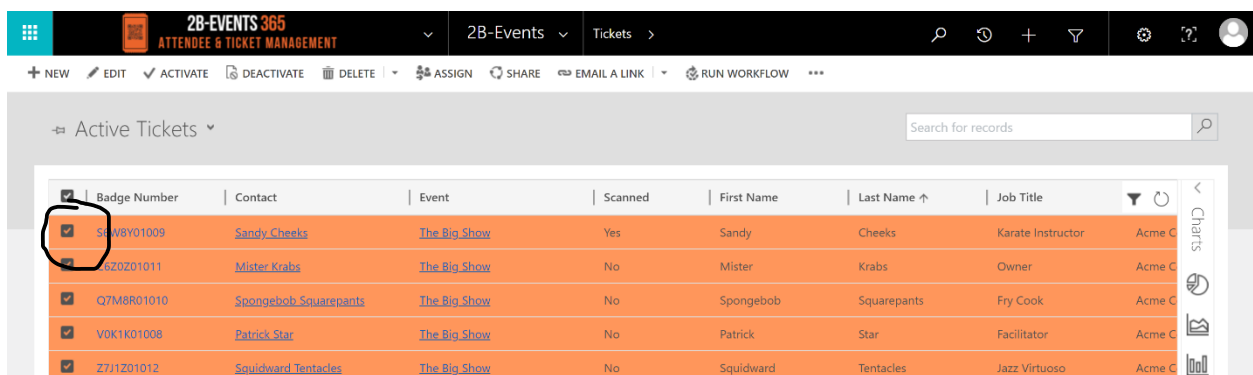
2B-EVENTS 365 USER GUIDE

pg. 22

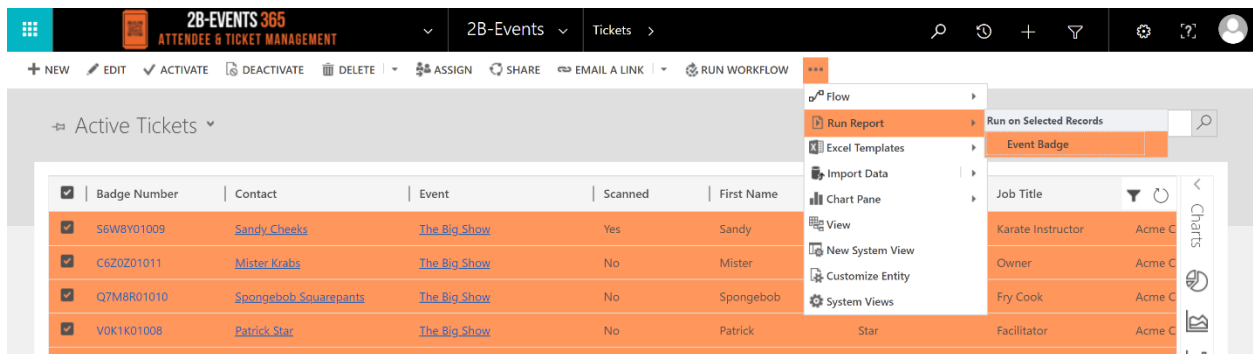
1. Navigate to 2B-Events → Attendance → Tickets



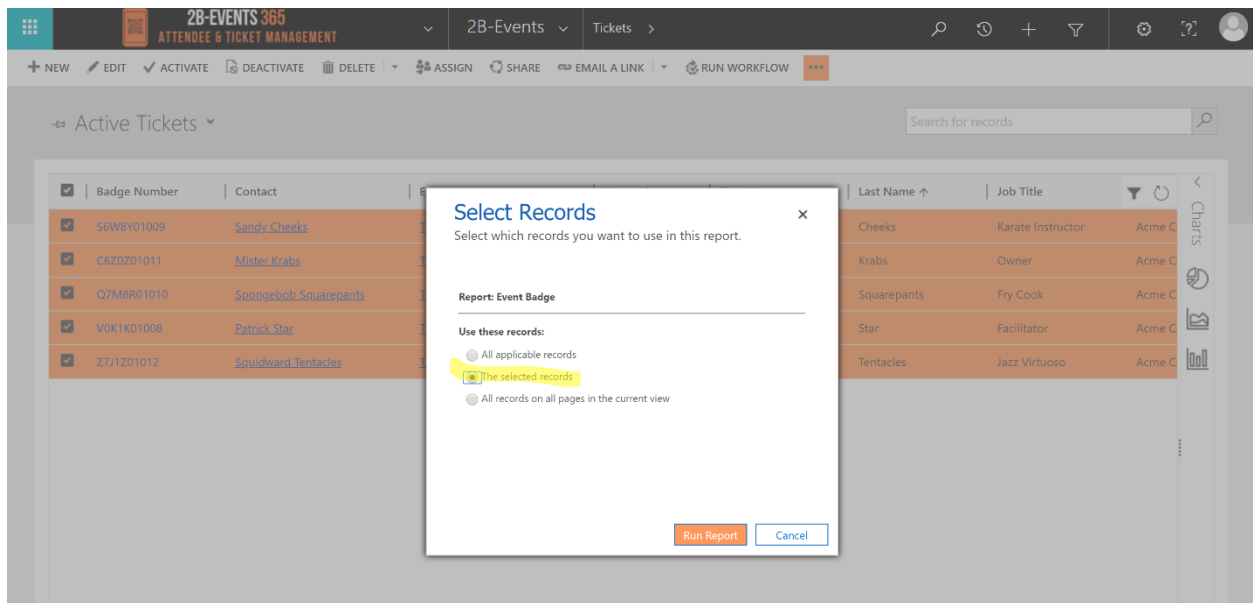
2. The default view shows all Active Tickets. Select the tickets to be printed by checking the box to the left of the record.



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.

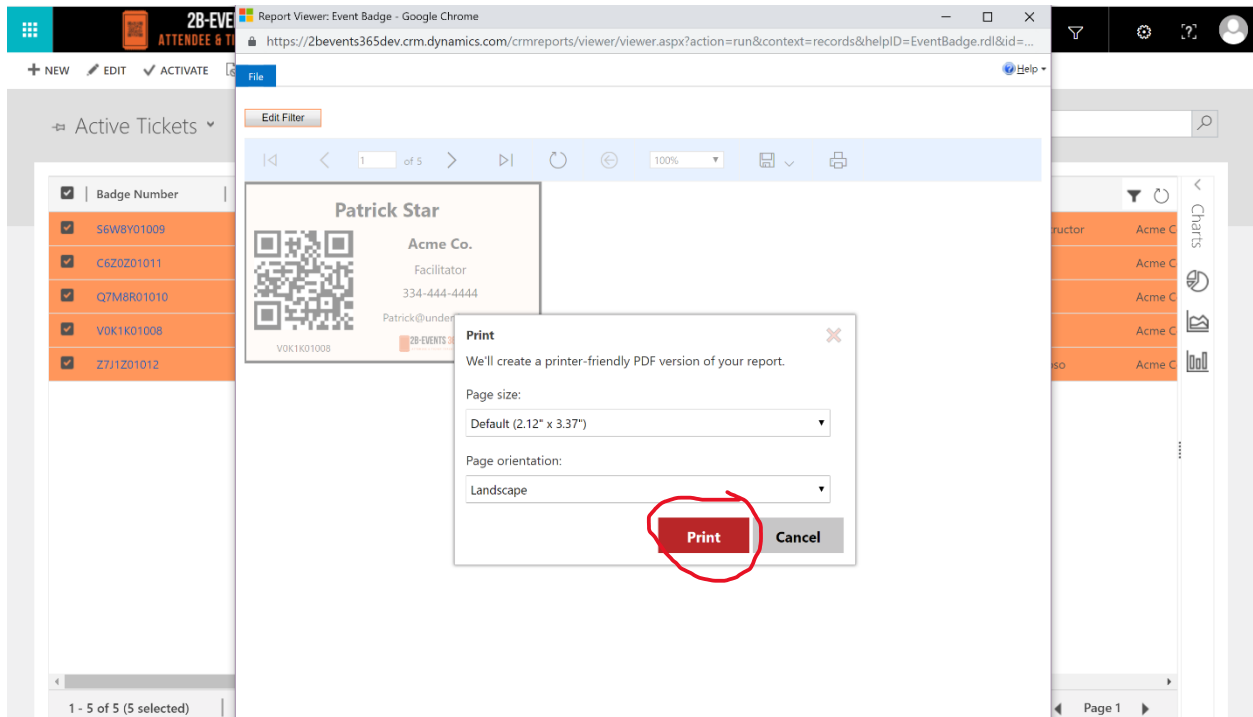


5. A ticket will be created for each of the selected records.

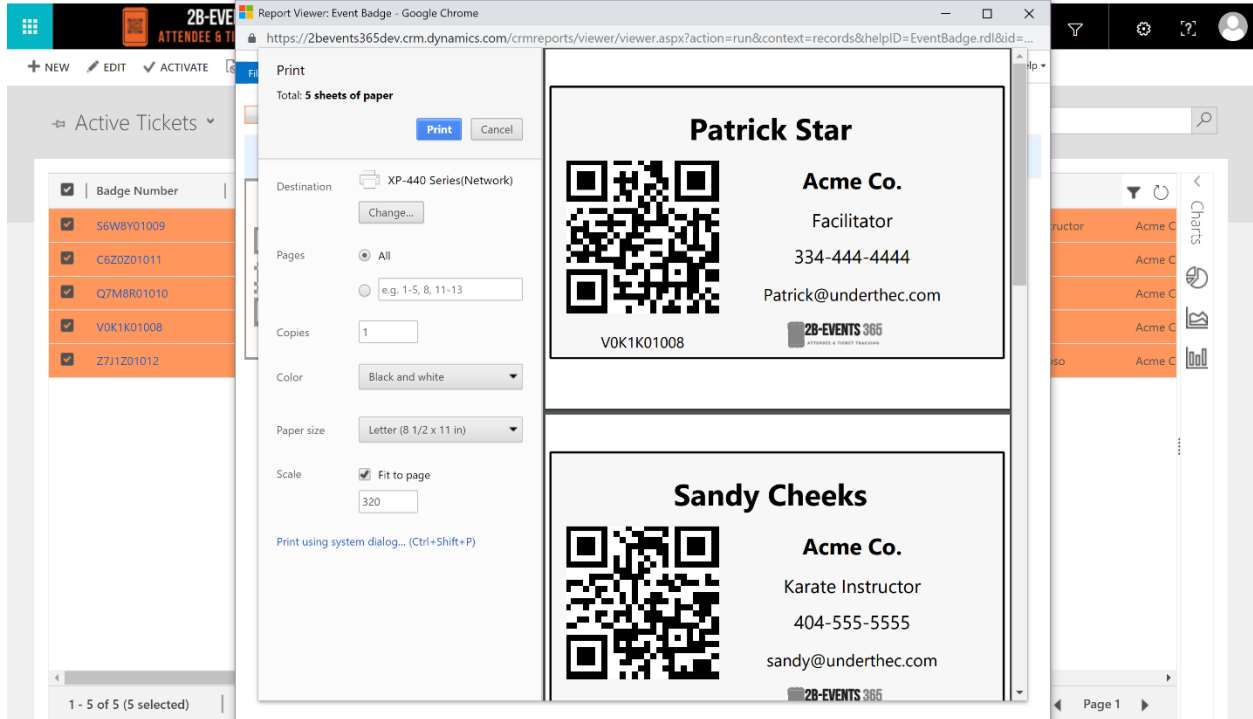


6. Click PRINT. (The default size for tickets is set at 2.12" x 3.37". To create a custom badge/ticket for batch printing, please contact us.)





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

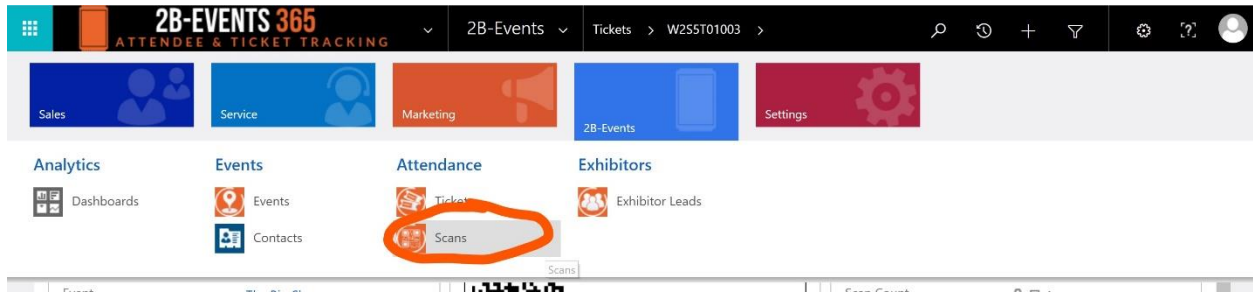


SCANS

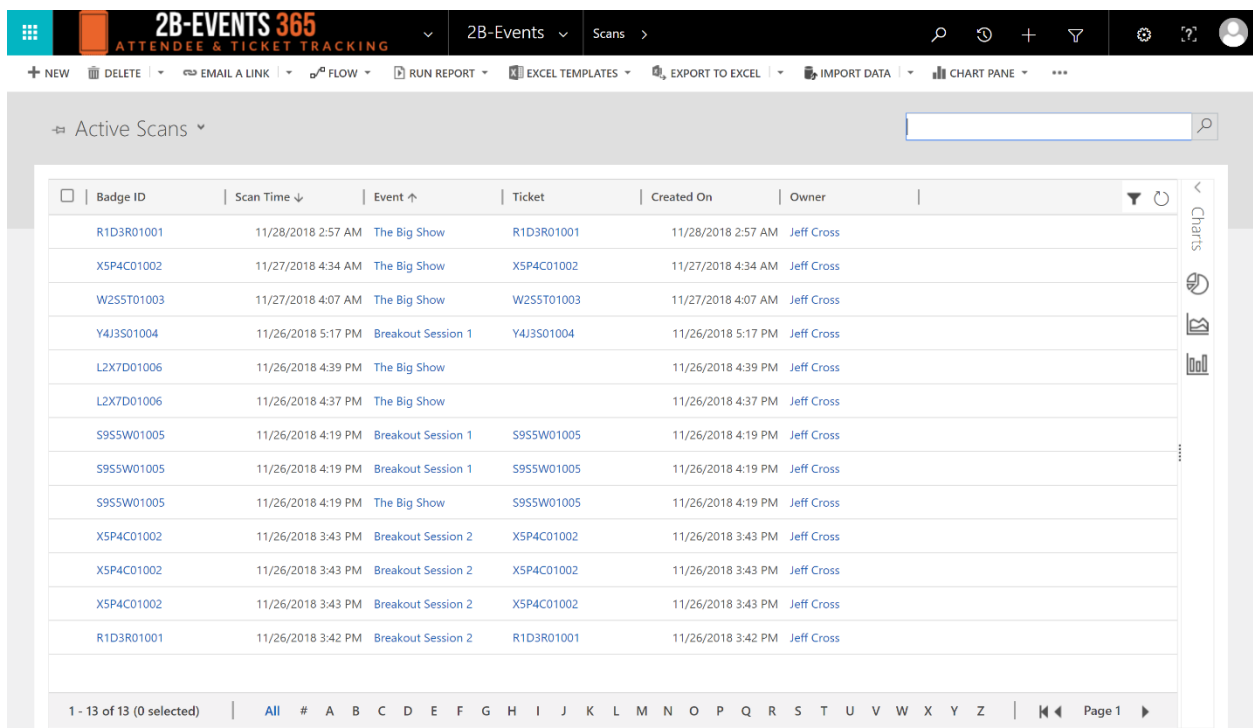
---

## 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](#).



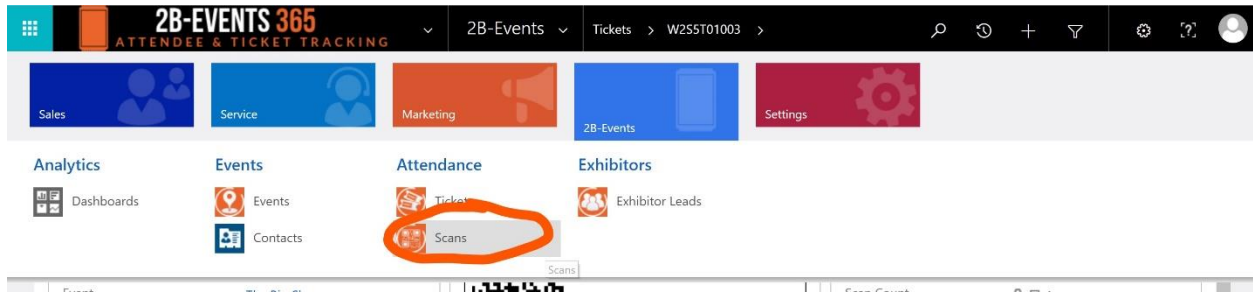
Badge ID	Scan Time	Event	Ticket	Created On	Owner
R1D3R01001	11/28/2018 2:57 AM	The Big Show	R1D3R01001	11/28/2018 2:57 AM	Jeff Cross
X5P4C01002	11/27/2018 4:34 AM	The Big Show	X5P4C01002	11/27/2018 4:34 AM	Jeff Cross
W255T01003	11/27/2018 4:07 AM	The Big Show	W255T01003	11/27/2018 4:07 AM	Jeff Cross
Y4J3S01004	11/26/2018 5:17 PM	Breakout Session 1	Y4J3S01004	11/26/2018 5:17 PM	Jeff Cross
L2X7D01006	11/26/2018 4:39 PM	The Big Show		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
S955W01005	11/26/2018 4:19 PM	Breakout Session 1	S955W01005	11/26/2018 4:19 PM	Jeff Cross
S955W01005	11/26/2018 4:19 PM	Breakout Session 1	S955W01005	11/26/2018 4:19 PM	Jeff Cross
S955W01005	11/26/2018 4:19 PM	The Big Show	S955W01005	11/26/2018 4:19 PM	Jeff Cross
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

---

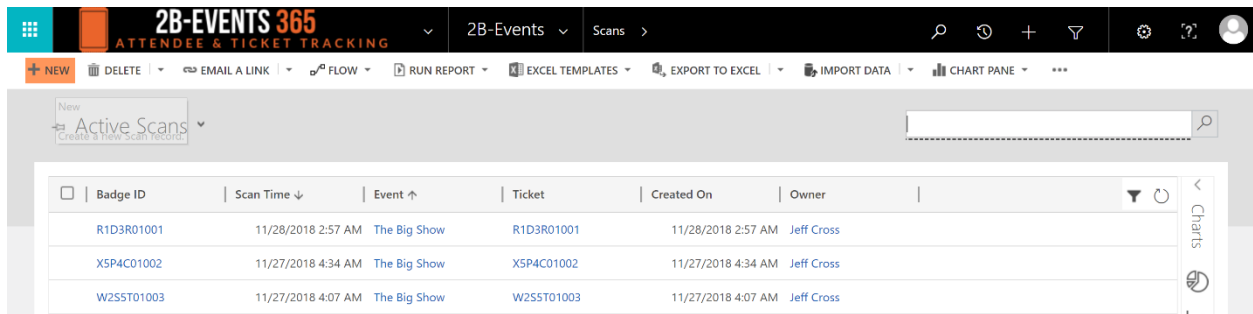
## ENTER SCANS MANUALLY

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

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



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



3. Enter Scan information and SAVE & CLOSE

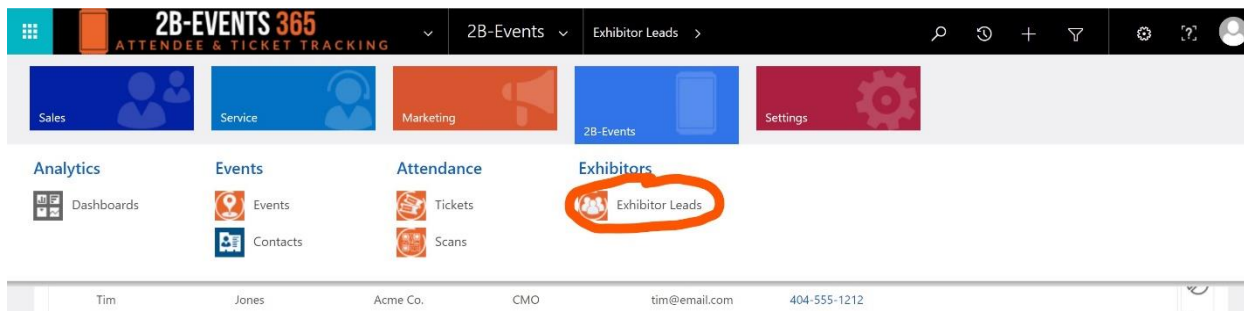
The screenshot shows the 'New Scan' form. The top navigation bar includes '2B-Events' and 'Scans > New Scan'. Below the navigation bar, there are several action buttons: 'SAVE', 'SAVE & CLOSE', '+ NEW', 'FLOW', and 'FORM EDITOR'. The 'SAVE & CLOSE' button is highlighted with a red circle. The form is divided into several sections: 'DETAILS', 'ATTENDEE', 'COMPANY', 'EVENT', and 'NOTES'. The 'DETAILS' section includes fields for 'Badge ID', 'Ticket', 'Scan Time', 'Device Code', and 'Owner'. The 'ATTENDEE' section includes fields for 'First Name', 'Last Name', 'Title', 'Company Name', 'Email', and 'Phone'. The 'COMPANY' section includes fields for 'Company' and 'Company Code'. The 'EVENT' section includes a field for 'Event'. The 'NOTES' section includes a tab for 'ACTIVITIES' and a tab for 'NOTES'. The 'NOTES' tab is selected, and it displays the message: 'There aren't any notes to show. To get started, enter a note.'

## EXHIBITOR LEADS

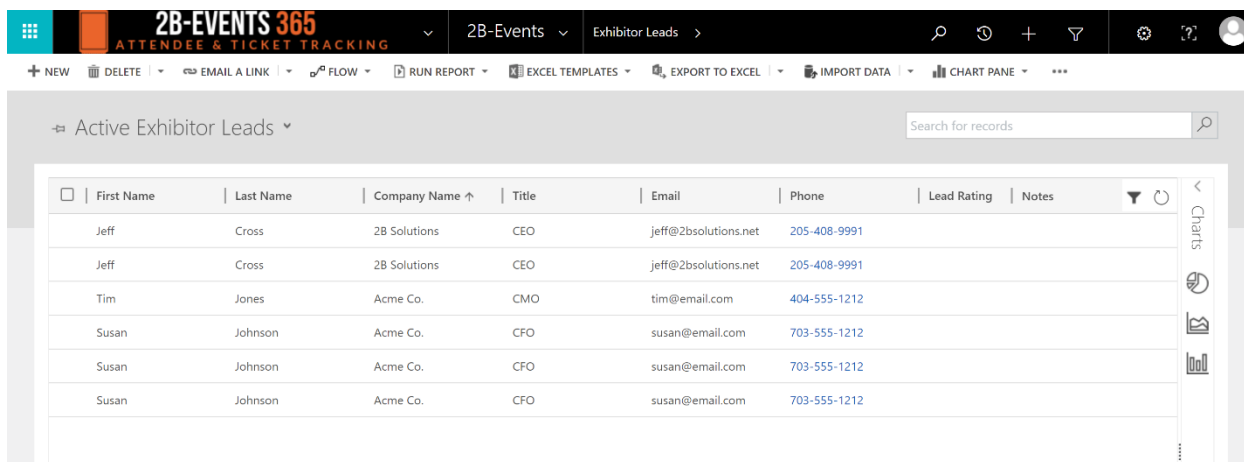
Exhibitors can capture lead information at events such as trade shows using the 2B-EVENTS mobile application for Exhibitors. See Navigating the Mobile Application for Exhibitors for instruction on its use.

## 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](#).



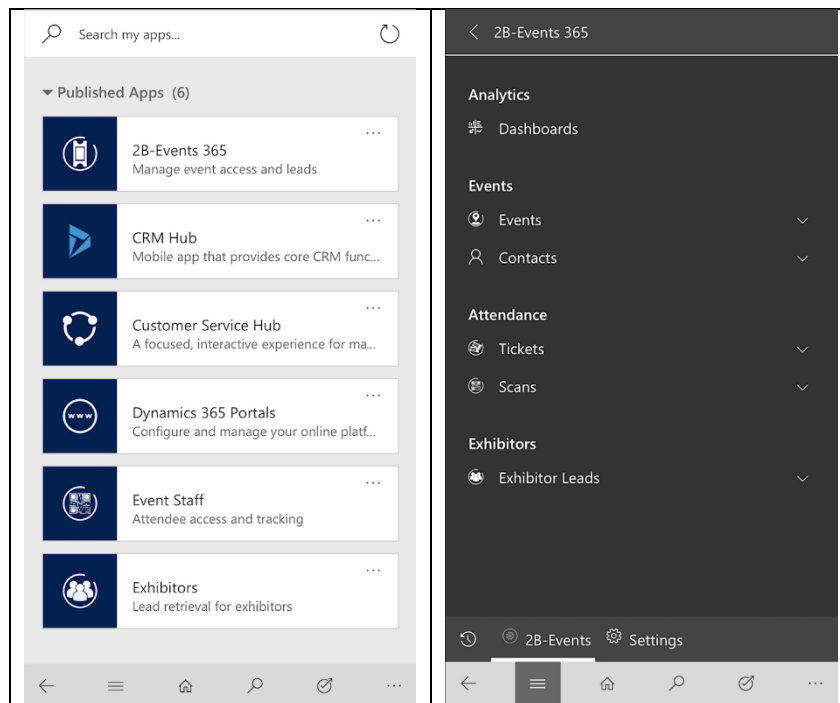
3. The Exhibitor Leads can be exported to Excel by utilizing the Export to Excel function. See [Export Data to Excel](#) for more information.



## NAVIGATING THE 2B-EVENTS 365 MOBILE APPLICATION FOR ADMINISTRATORS

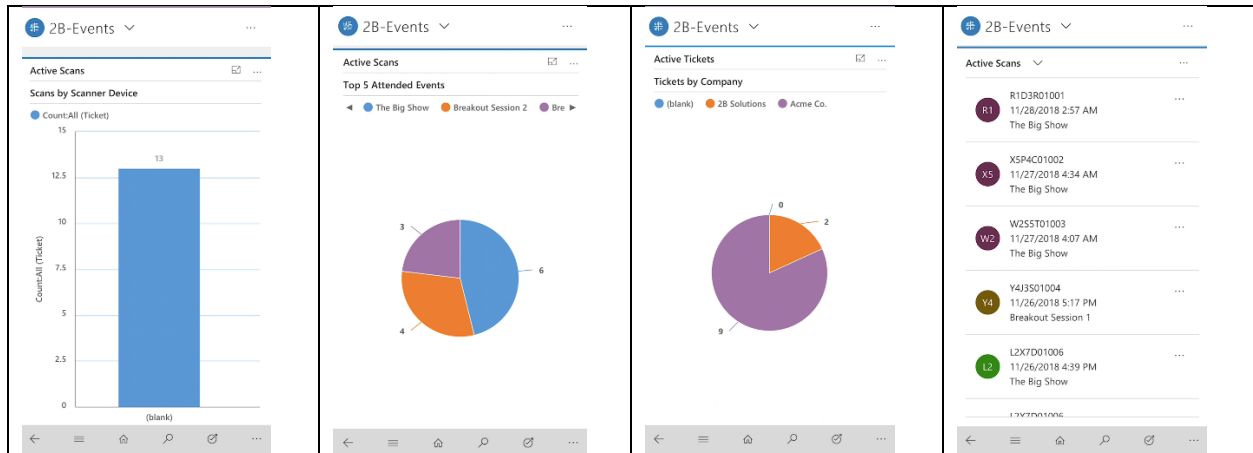
The mobile application for 2B-EVENTS 365 Administrators shows most of the same information available in the core application. This information includes Dashboards, Events, Tickets, Scans and Exhibitor info.

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



### DASHBOARDS

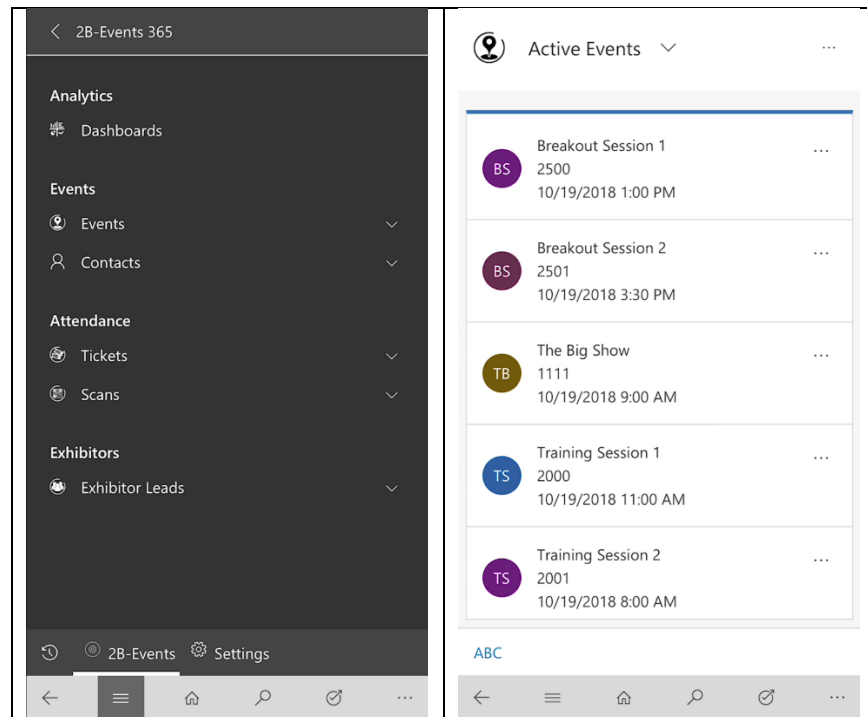
1. Under Dashboards, the user can see analytics relating to Scans by Device, Active Scans, Tickets by Company and Active Scans by scrolling down the page.



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.

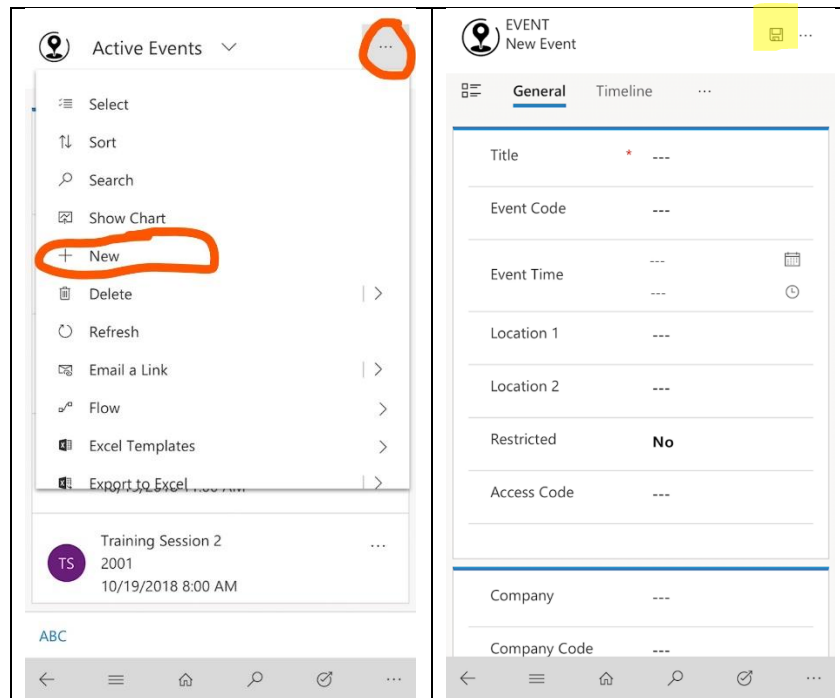
## EVENTS

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



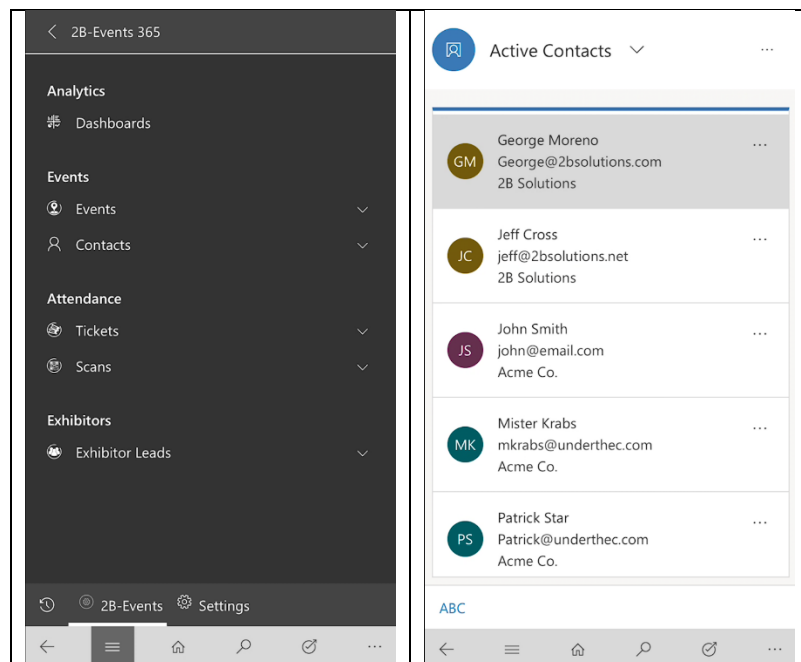
2. A new Event can be added by pressing ... and choosing +NEW. A blank Event form will appear. Enter information for Event and Save.



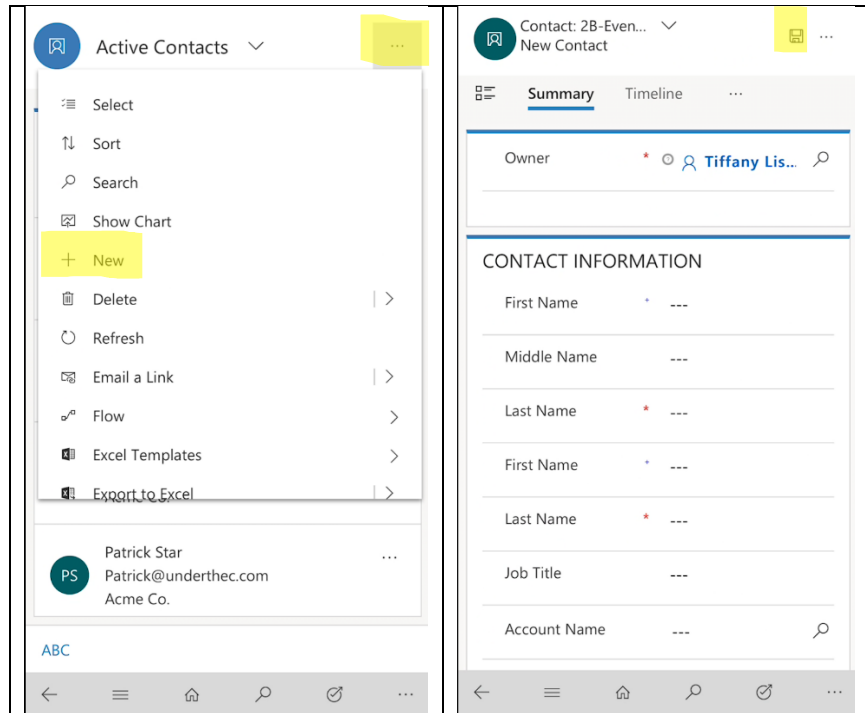


## CONTACTS

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

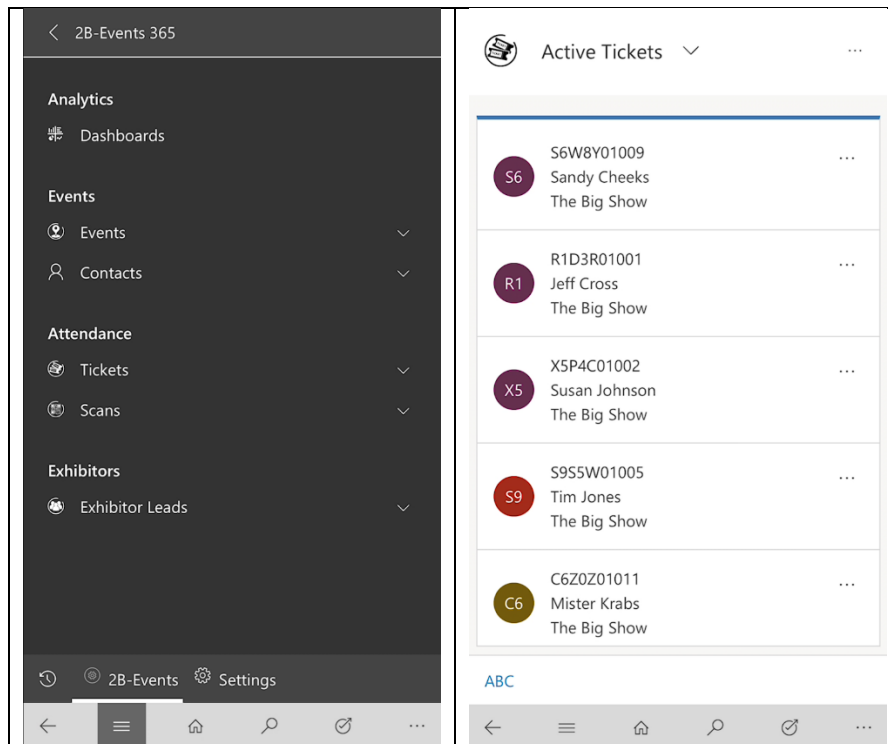


3. To add a new Contact, press ... and choose +NEW. A blank Event form will appear. Enter information for Event and Save.

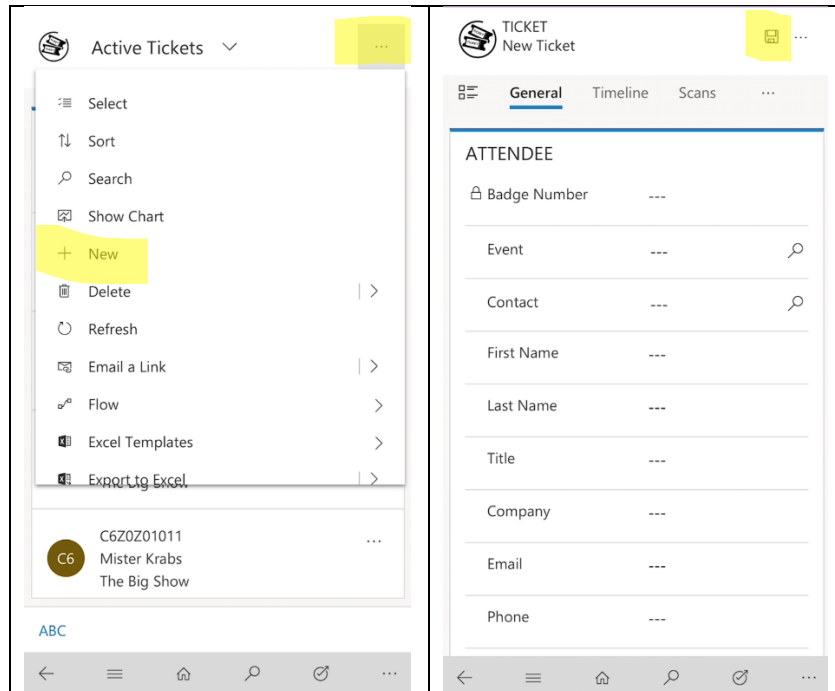


## TICKETS

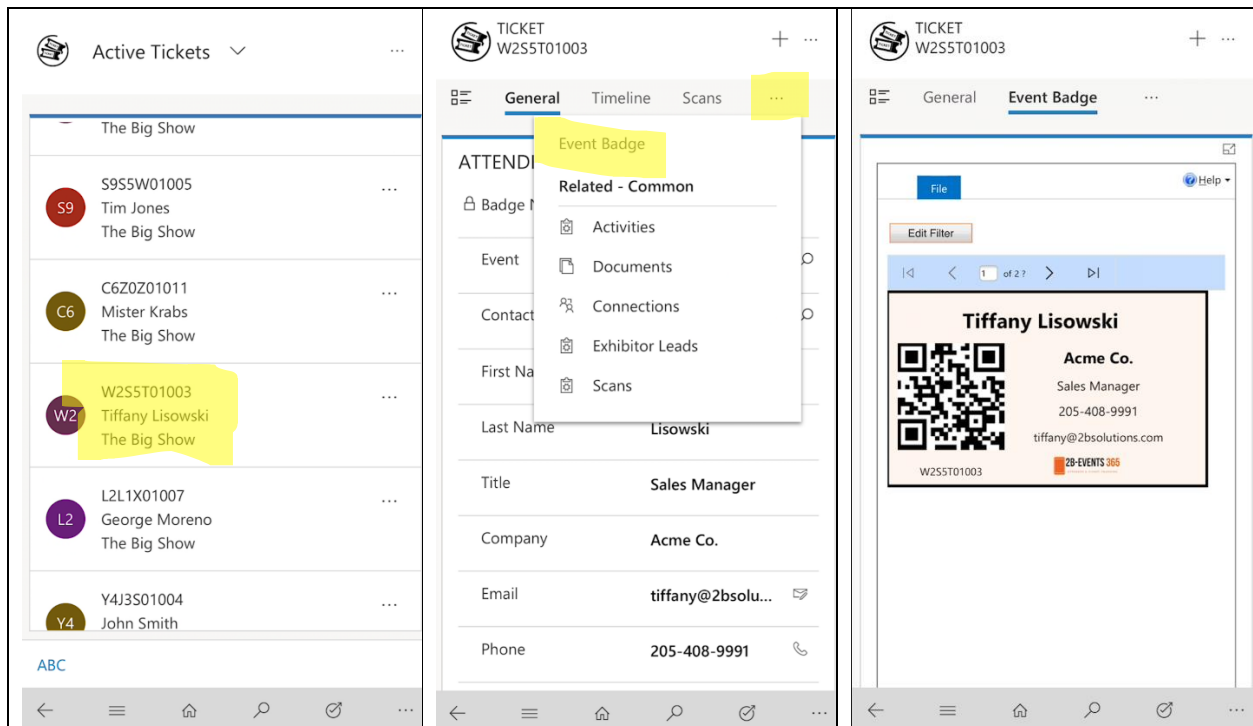
1. From the home screen, select Tickets to see a list of Active Tickets.



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.

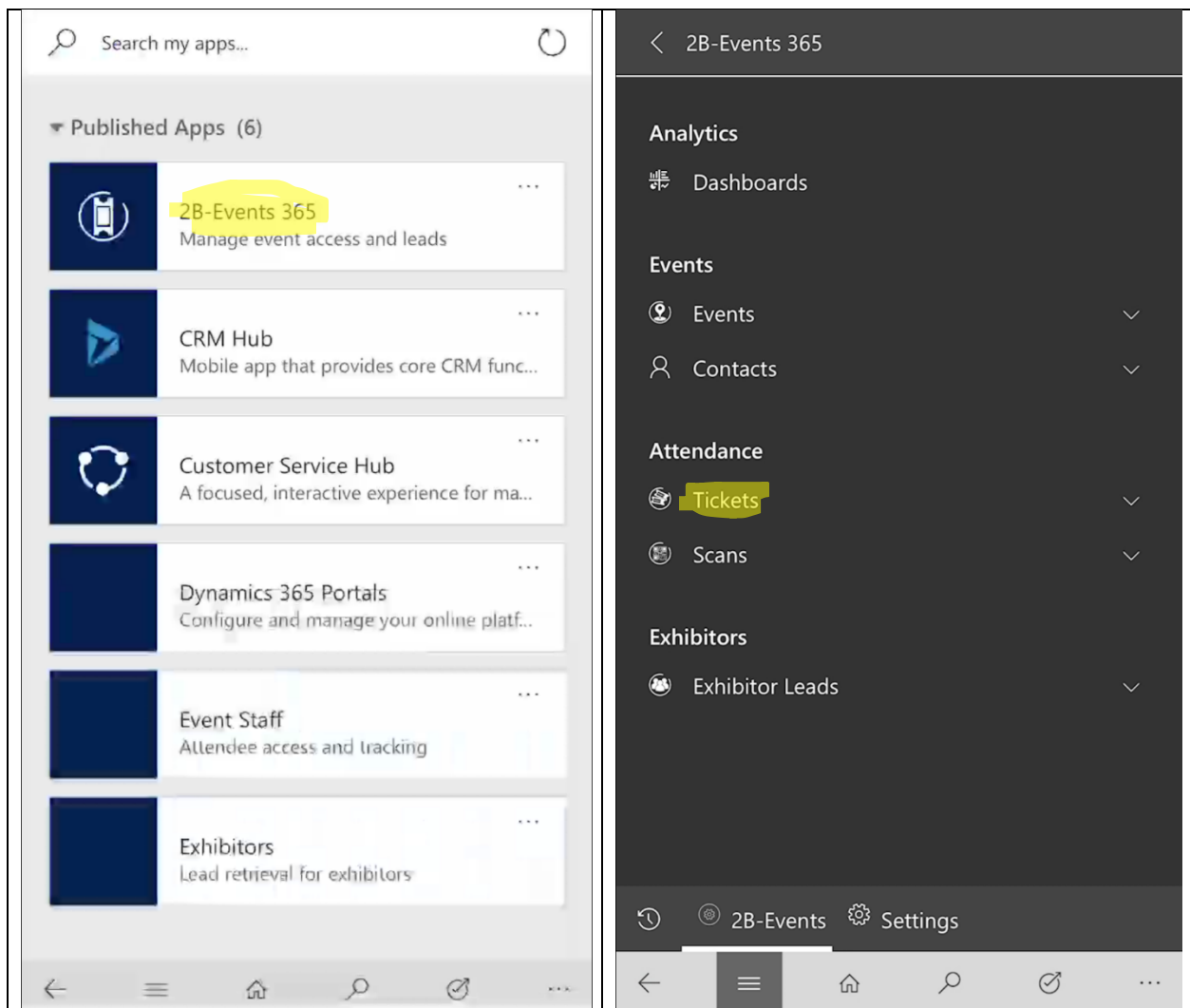


4. If on-site badge or ticket printing is required, please see Mobile Badge Printing.

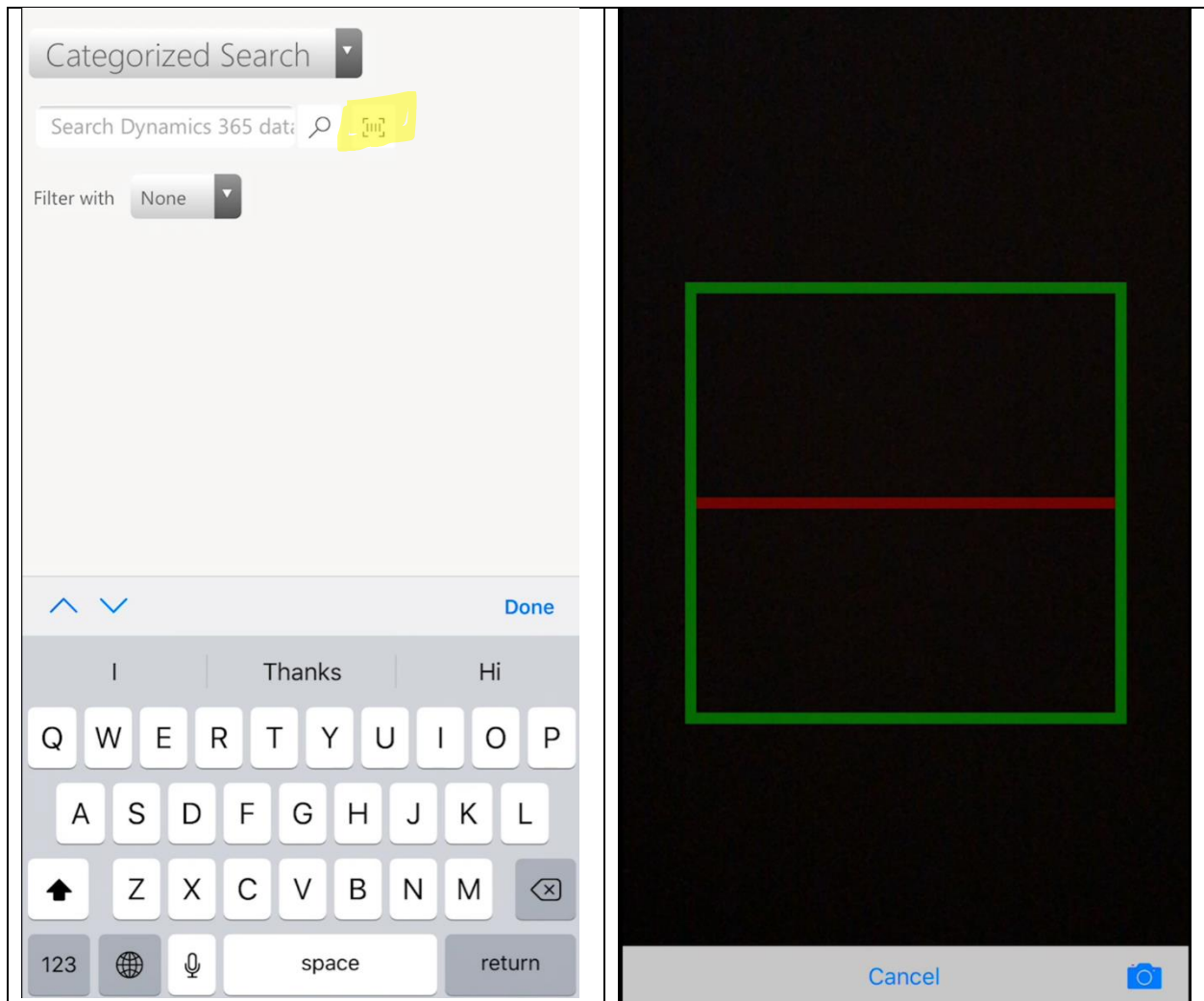
## MOBILE TICKET/BADGE PRINTING

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

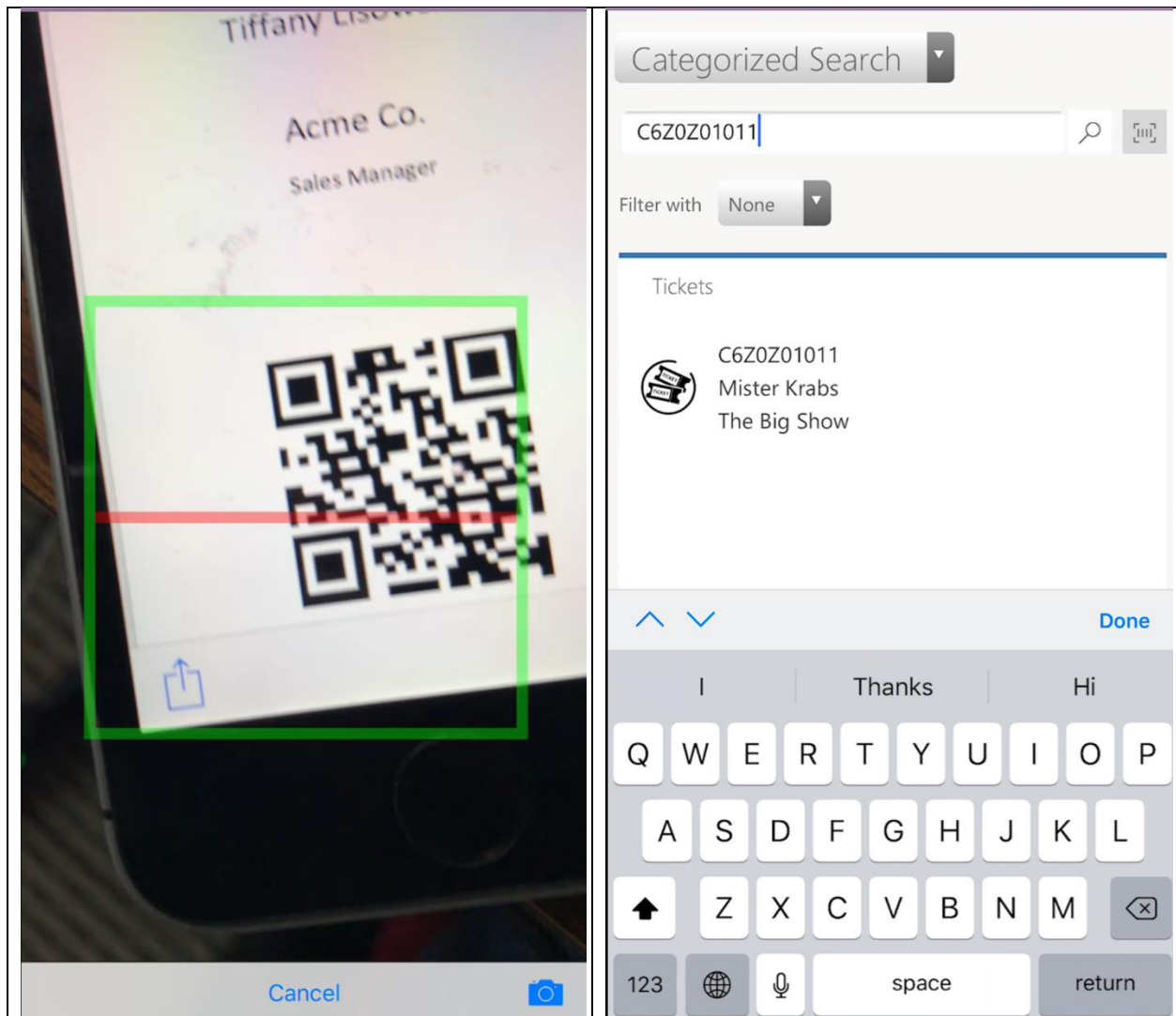
1. Log into your Dynamics 365 Mobile App. Navigate to 2B-Events 365 then Tickets.



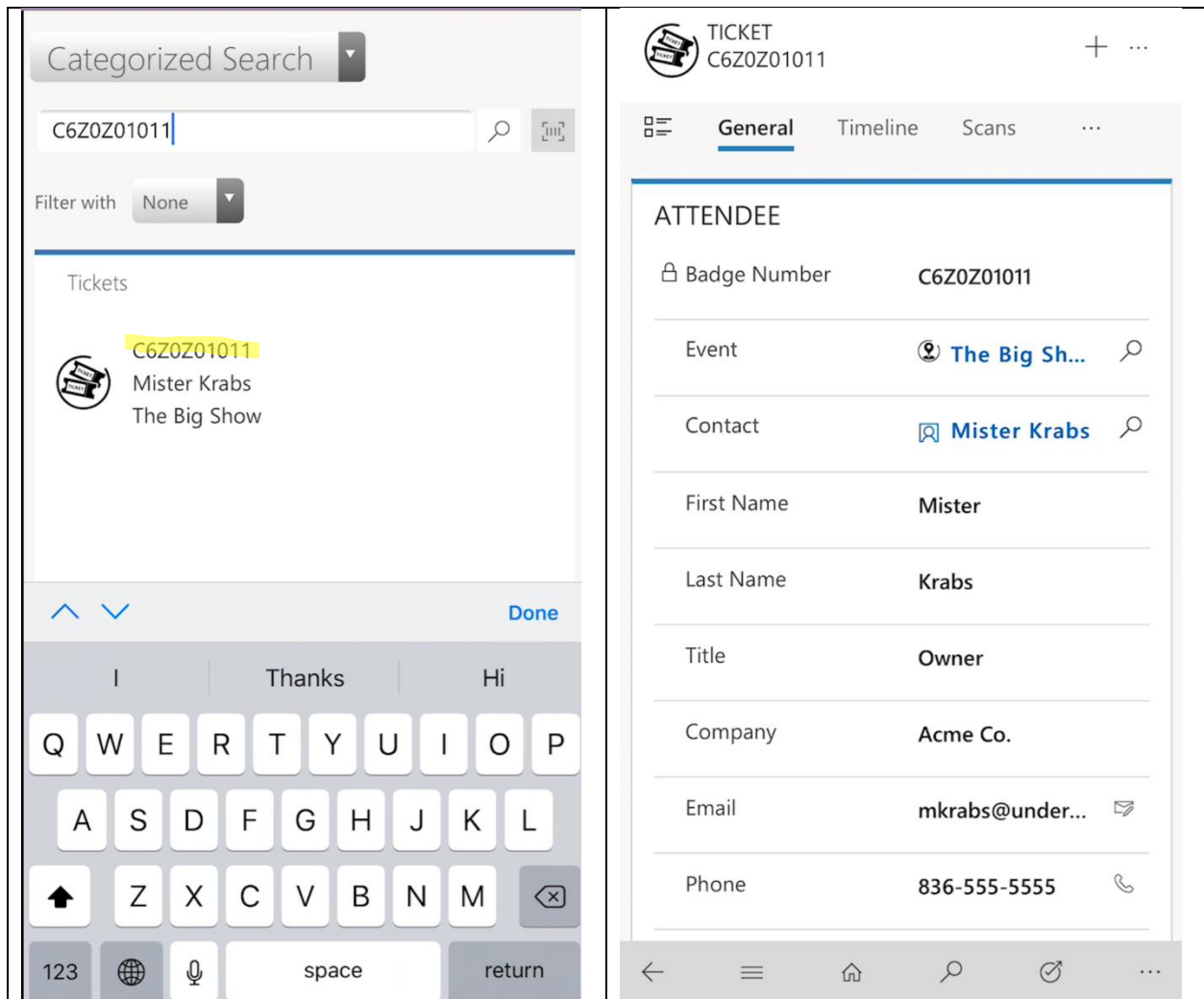
2. The following screen will appear. Click on the scanner button to open camera for ticket scanning.



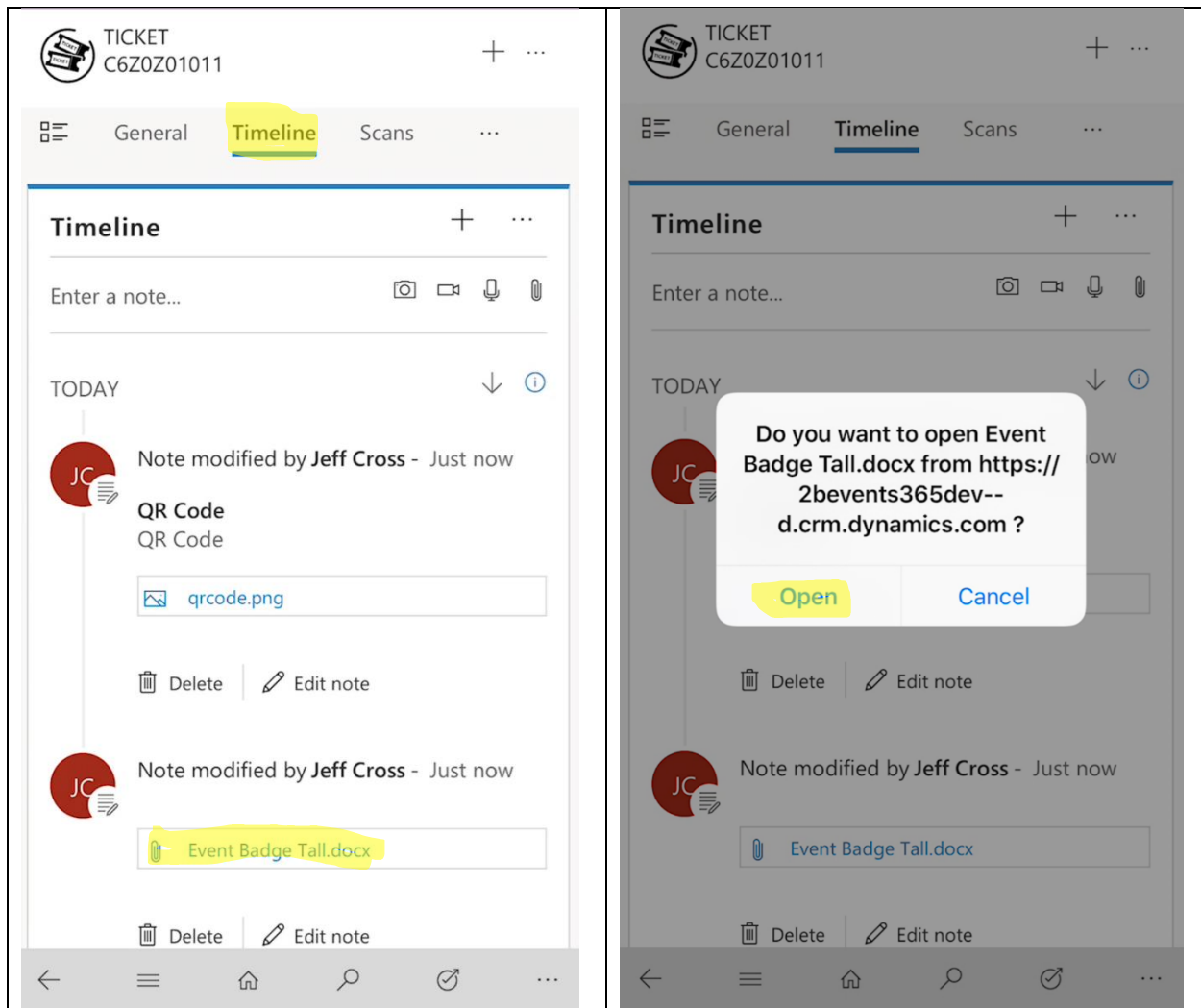
3. Scan the QR Code on the ticket to bring up the ticket record.



4. Click on the ticket record to open.

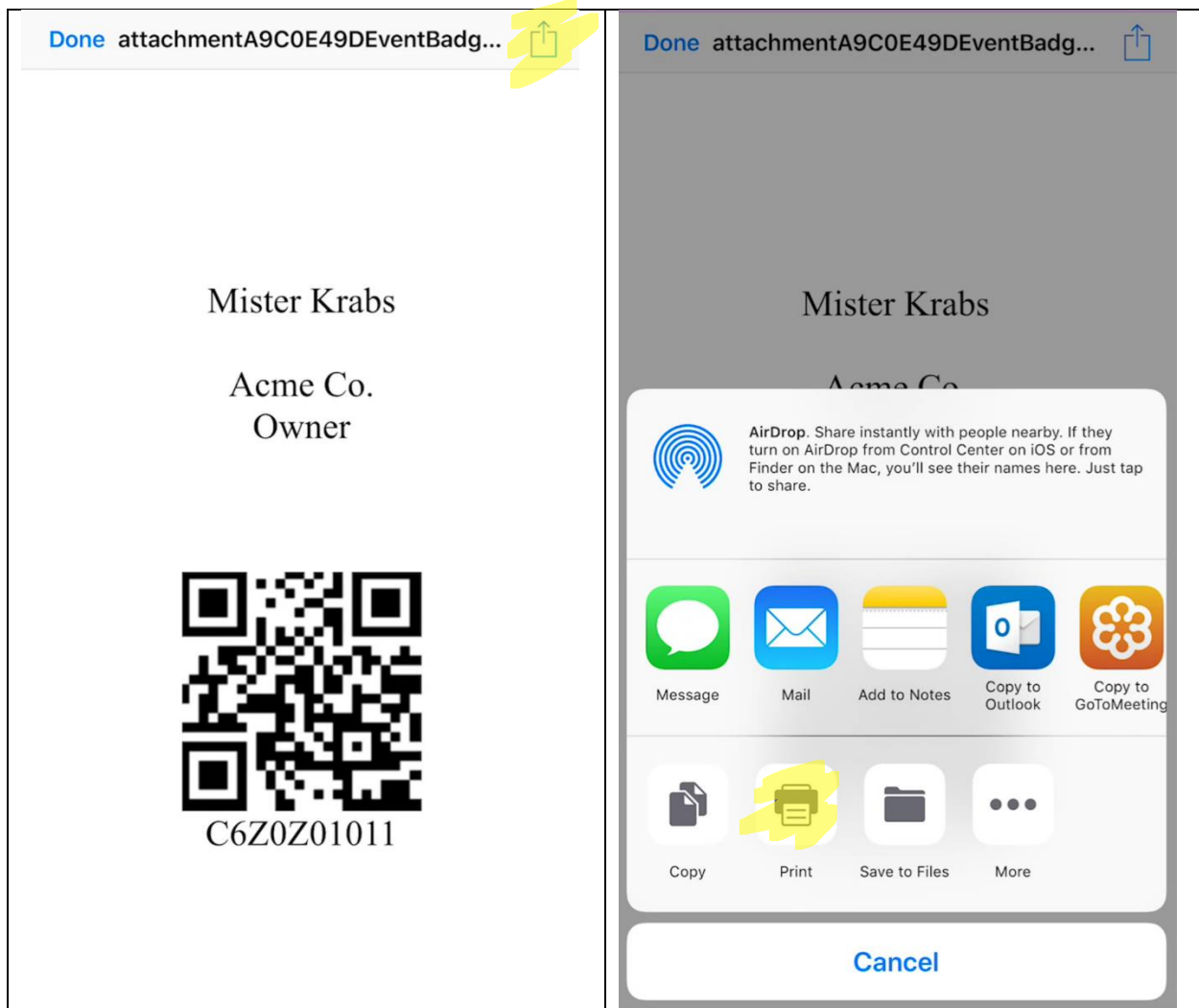


5. On the ticket record, choose Timeline. Then click on the Event Badge template to open. Choose Okay.

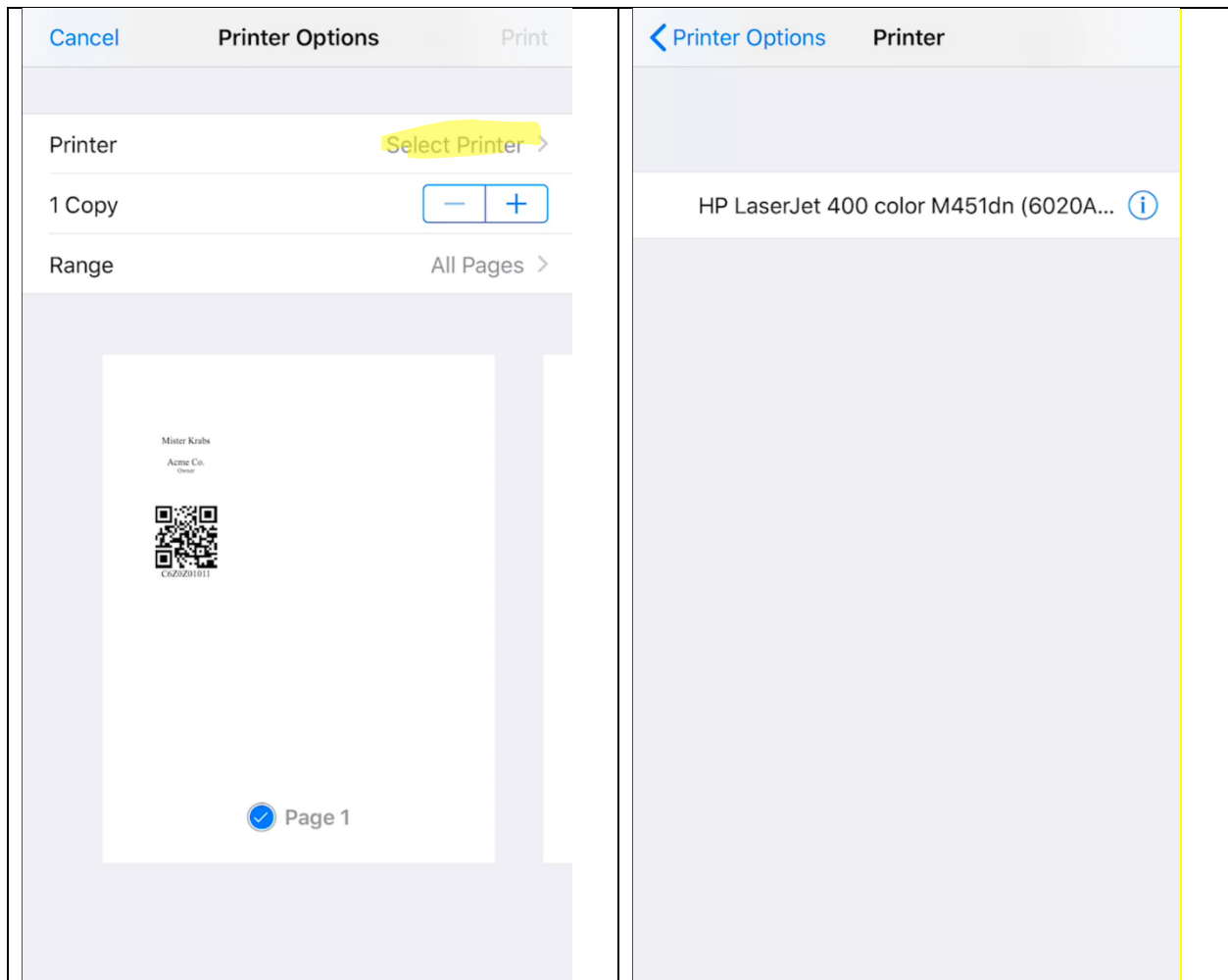


6. The Badge/ticket template will open. Click on the icon. Then choose Print. (**NOTE: This example is shown using an iOS device. The procedure may vary slightly on an Android device.**)



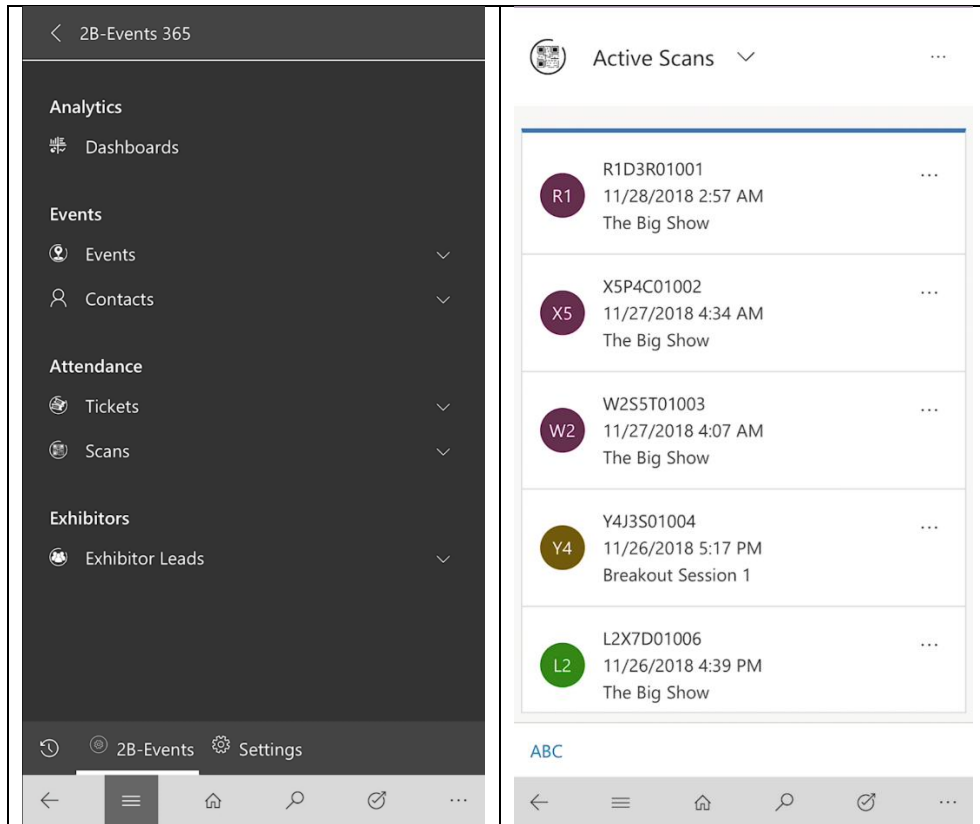


7. Select the appropriate printer and then PRINT.

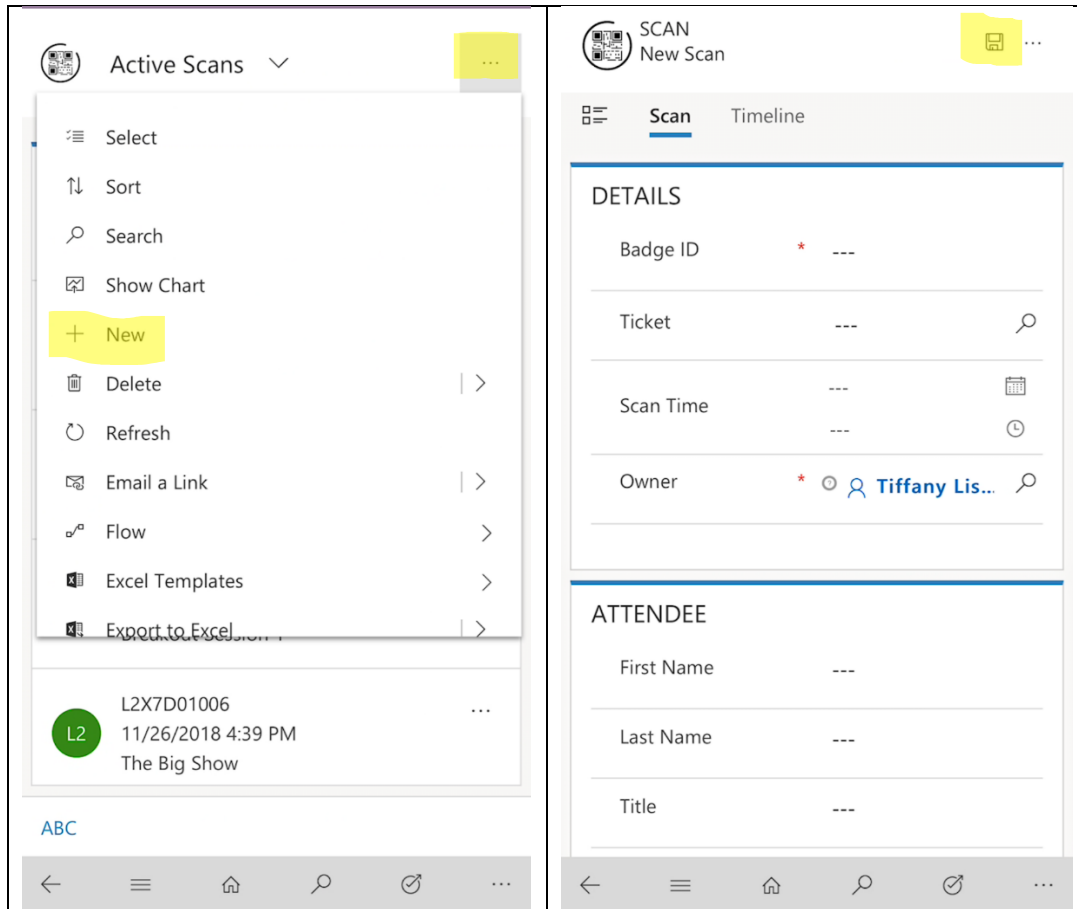


## SCANS

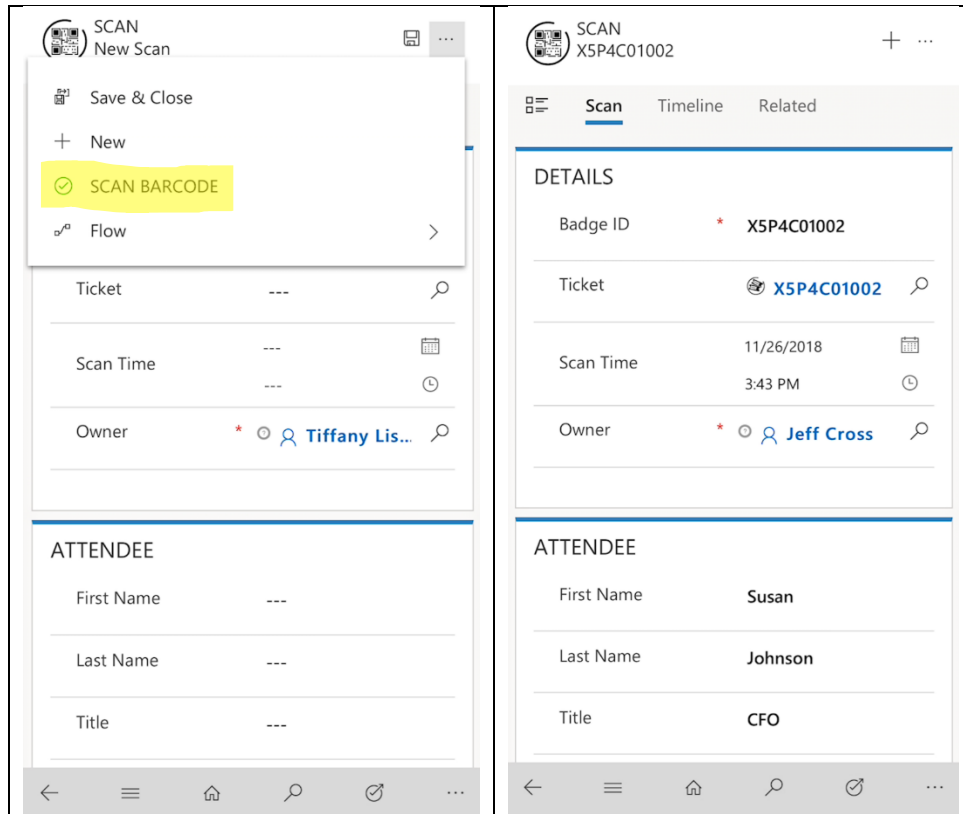
1. To see a list of Active Scans, select Scans from home page.



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

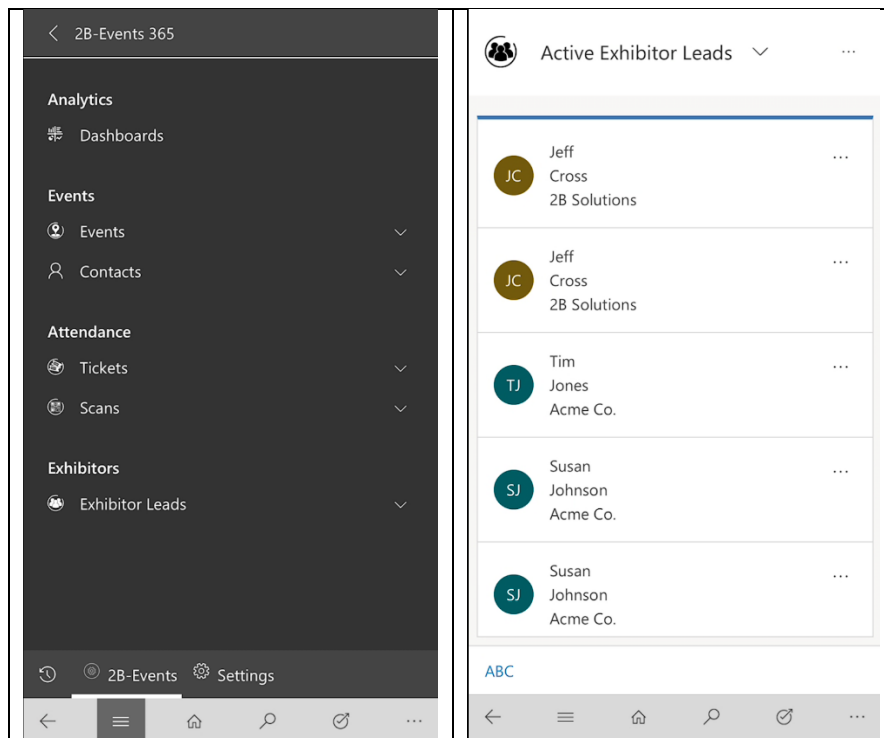


3. To scan an existing ticket/badge, press ... then Scan Barcode. The device camera will open and the QR Code can be scanned. The Scan record will auto-populate.



## 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.

The image displays two side-by-side screenshots of a mobile application interface for managing exhibitor leads.

**Left Screenshot: Active Exhibitor Leads**

- Header: "Active Exhibitor Leads" with a dropdown arrow and a yellow highlight on the menu icon.
- Menu Options:
  - Select
  - Sort
  - Search
  - Show Chart
  - + New** (highlighted in yellow)
  - Delete
  - Refresh
  - Email a Link
  - Flow
  - Excel Templates
  - Export to Excel
- Record Preview: A card for "Susan Johnson" from "Acme Co." with a circular icon containing "SJ".
- Bottom Bar: Labeled "ABC" with navigation icons.

**Right Screenshot: EXHIBITOR LEAD New Exhibitor Lead**

- Header: "EXHIBITOR LEAD New Exhibitor Lead" with a yellow highlight on the menu icon.
- Section: "Lead" with a sub-header "ATTENDEE".
- Form Fields:
  - First Name
  - Last Name
  - Title
  - Company Name
  - Email
  - Phone
  - Name
  - Owner (with a red asterisk and a user icon for "Tiffany Lis...")
  - Event
- Bottom Bar: Navigation icons.

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

Event

EXHIBITOR LEAD  
Susan Johnson

Lead

Related

ATTENDEE

First Name

Last Name

Title

Company Name

Email

Phone

Name

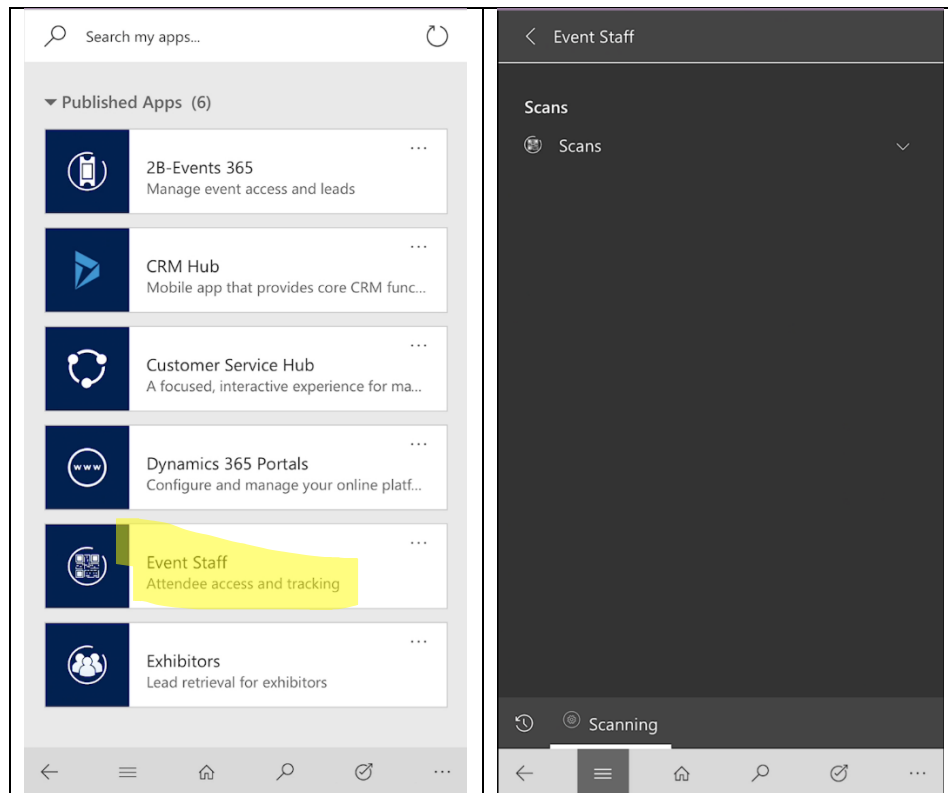
Owner

Event

## 2B-EVENTS MOBILE APP FOR EVENT STAFF

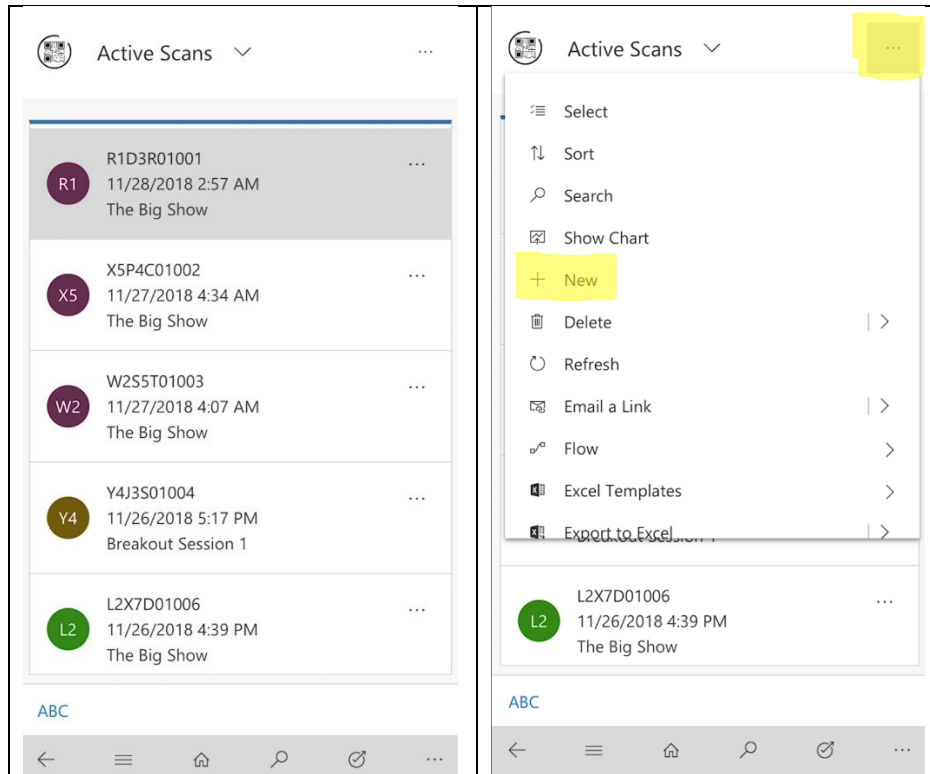
There is a separate mobile app for on-site event staff to streamline ticket/badge scanning and printing. This mobile application is intended for use by those event personnel who will be scanning attendee tickets and/or printing on-site and only includes the Scan functionality.

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

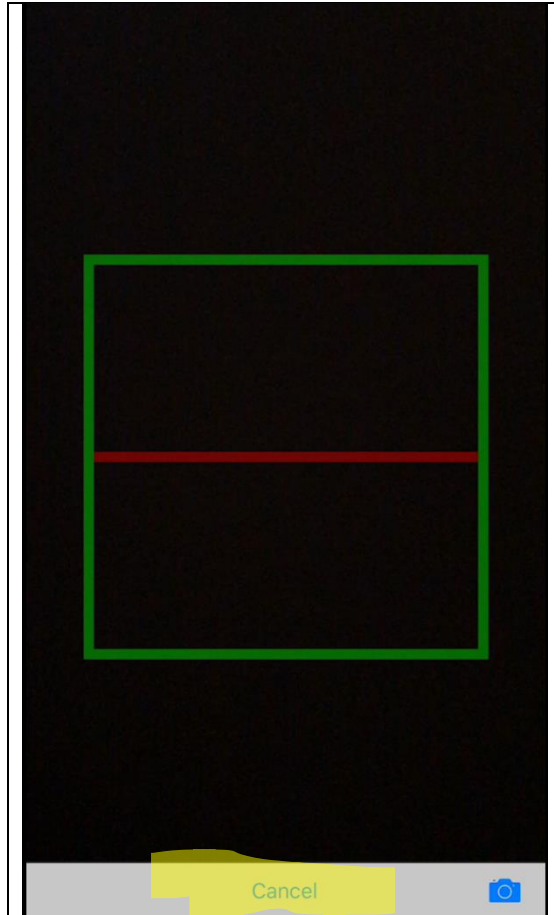


2. To set up the app to begin a series of ticket scans, choose Scans. Then choose ... and + New.

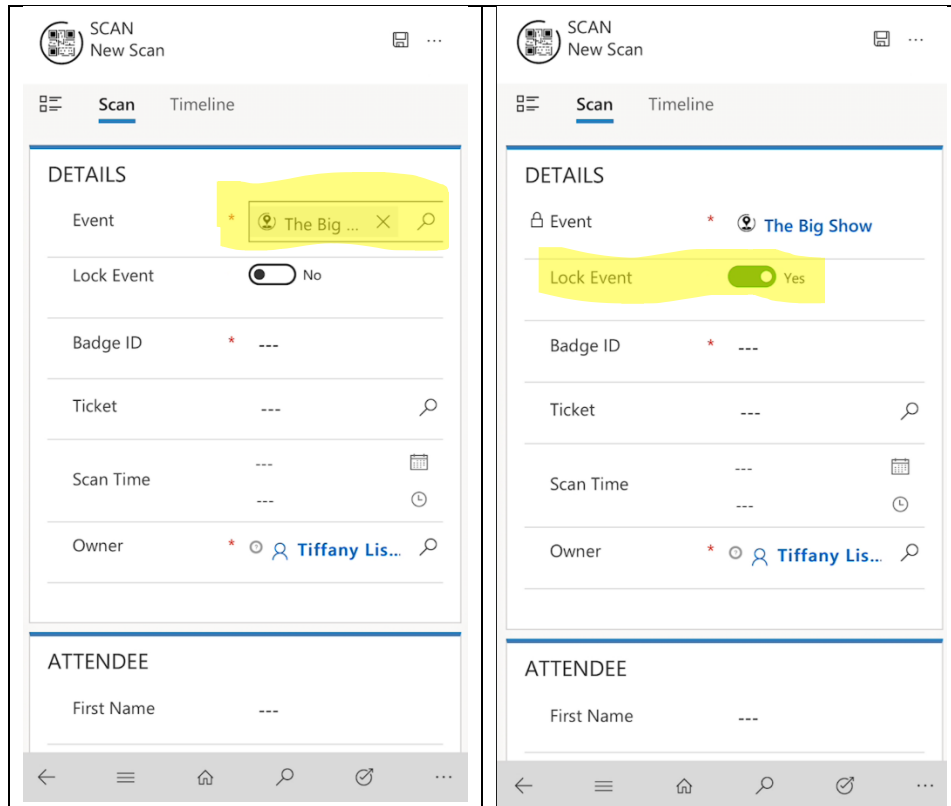




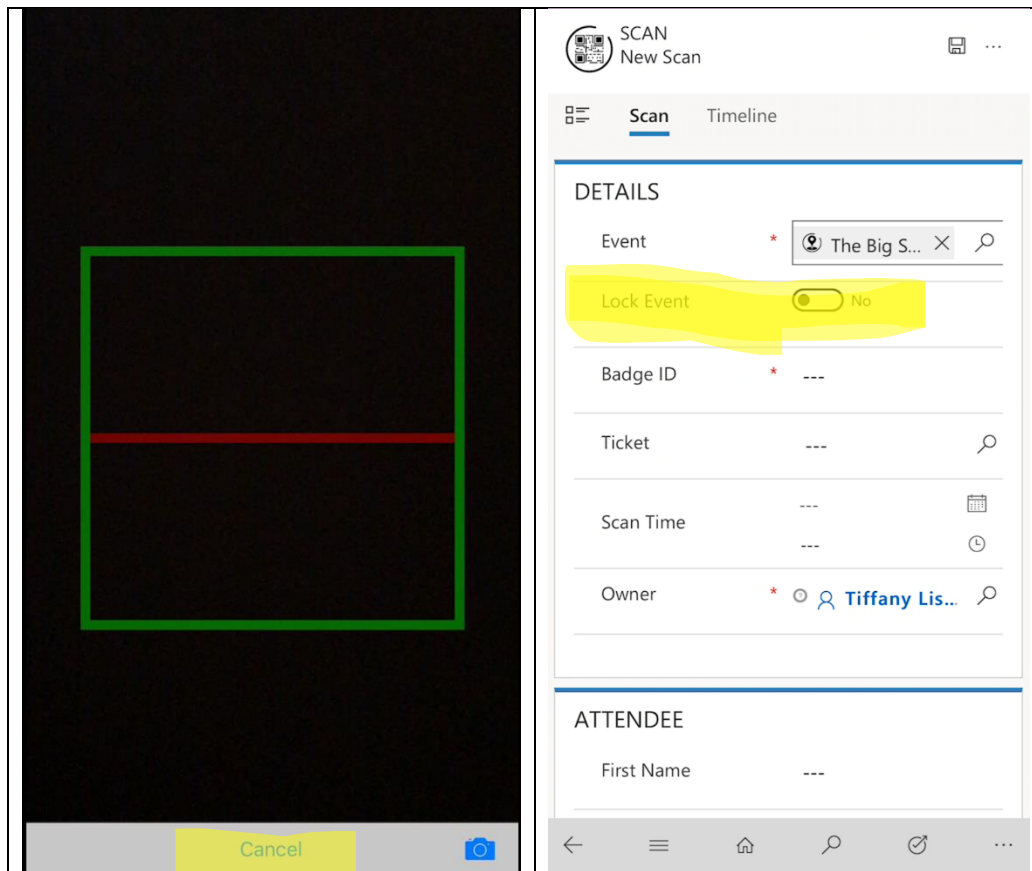
3. At this point, the device may automatically open the camera. Hit Cancel to continue setting up for ticket scanning.



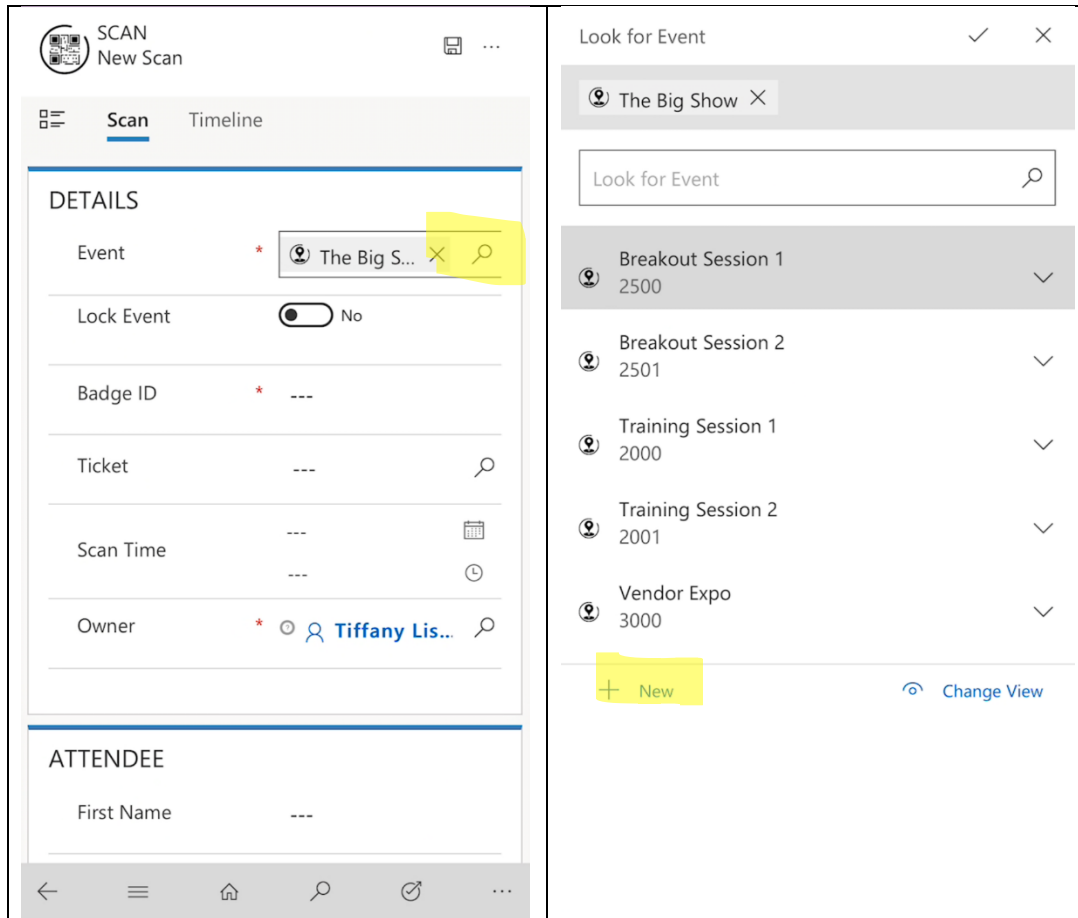
4. The screen will return to a new Scan record. Search for the related Event. Then toggle Lock Event to YES. This locks the Event and allows for multiple ticket scans for the same event.



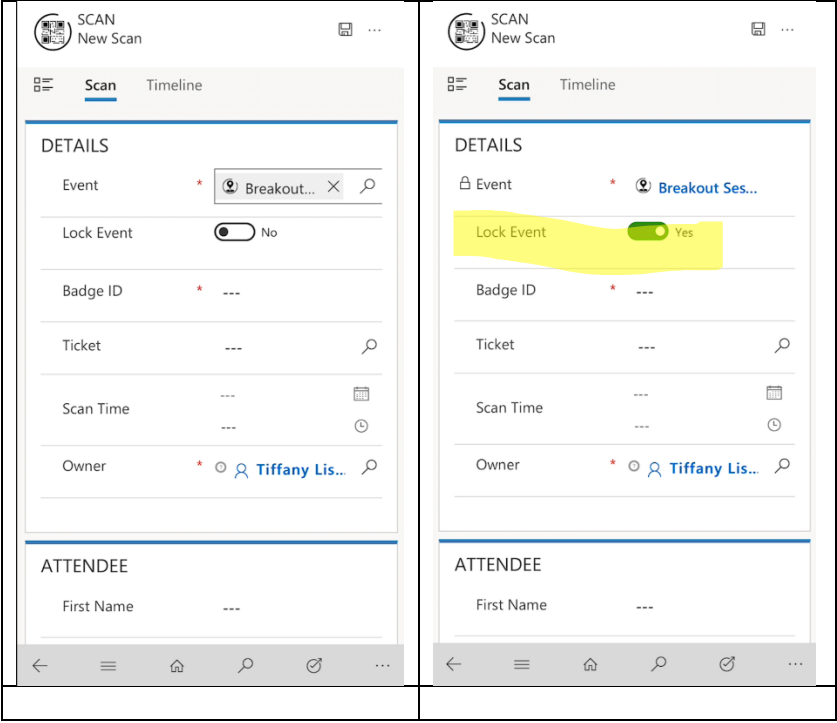
5. The device camera will open allowing the QR Code to be scanned. The form will auto-populate with the scan information, auto-save and reopen the camera to scan the next ticket. Tickets can continue to be scanned in this way until the Event is over or until the related Event needs to be changed.
6.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



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



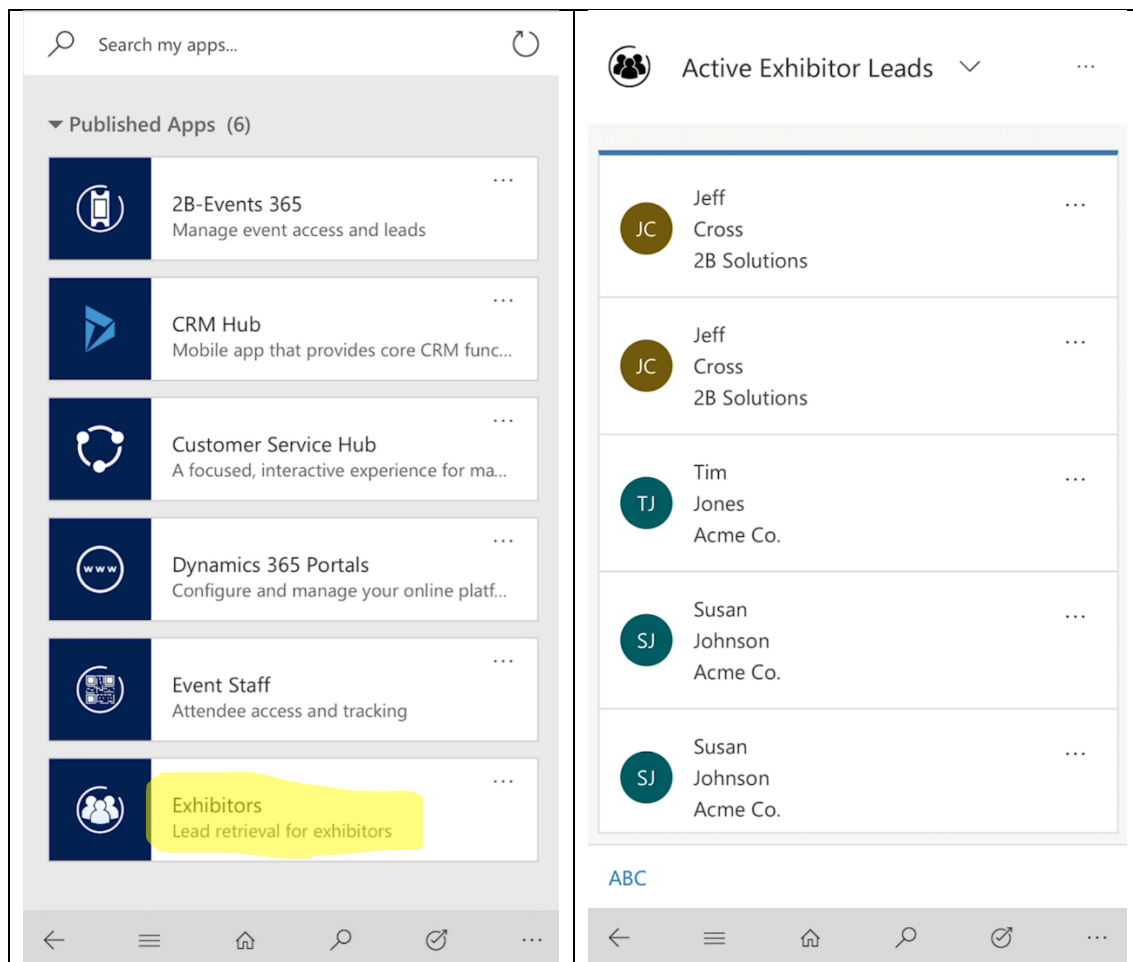
8. Select the new Event. Toggle Lock Event to YES and continue scanning tickets for the new Event as instructed above.



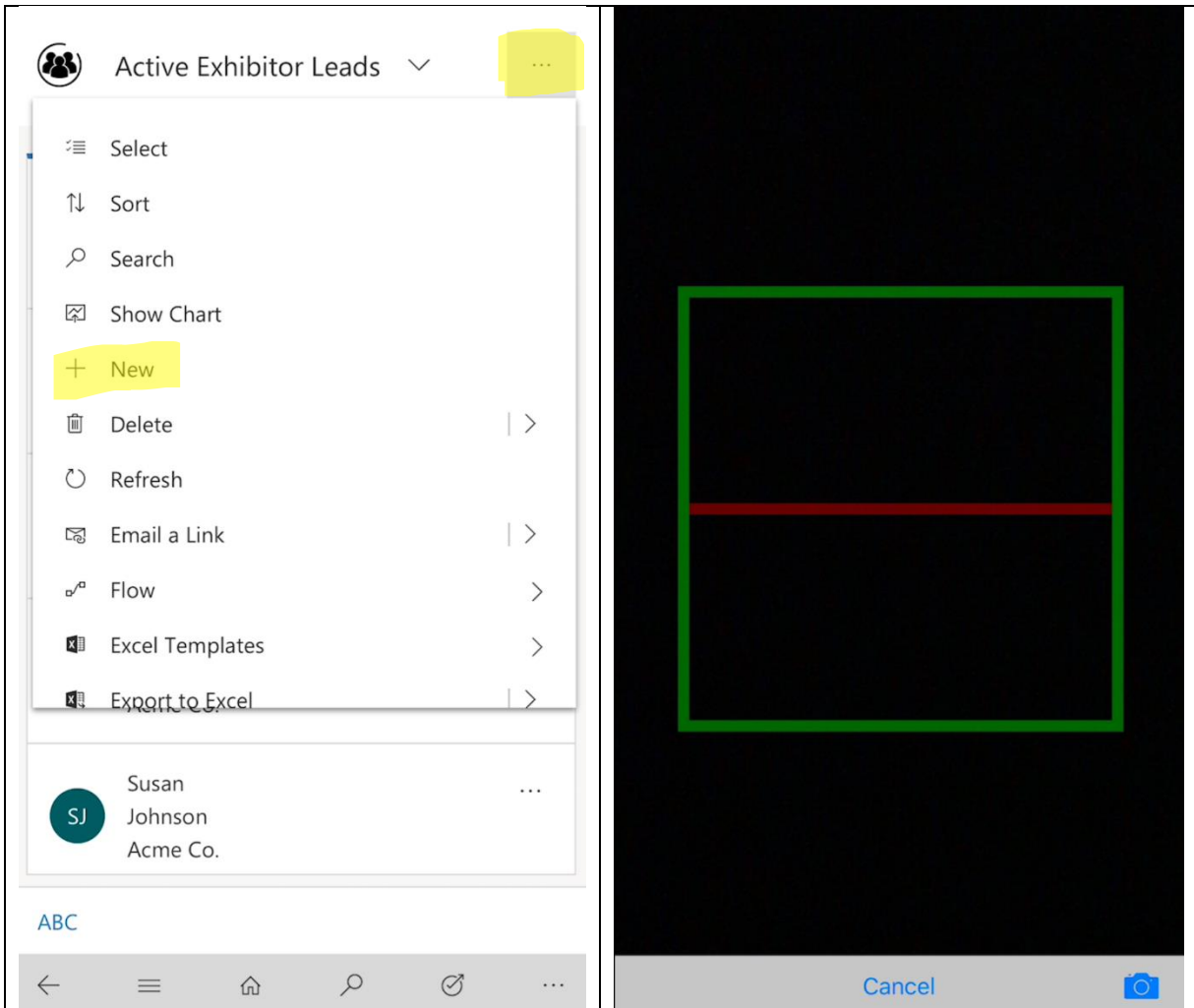
## 2B-EVENTS MOBILE APP FOR EXHIBITORS

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

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



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



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

## INFORMATION ON OPTIONAL WEB PORTAL

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

To learn more about the web portal, contact us at [sales@2bsolutions.com](mailto: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.

