

## Conference 6.0 Exhibitor Setup Quick Reference: Level 2

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

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

For detailed instructions, see the Conference documents and online help at <http://www.wingateweb.com/support> or refer to your training guide.

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### NOTE

To complete Setup tasks, you must have a System Administrator security role on your user account.

### 1: General Exhibitor Settings

1. Create or edit exhibitor types.  
Setup > Exhibitors > General > **Types**
2. Create or edit exhibitor statuses.  
Setup > Exhibitors > General > **Statuses**
3. If desired, set up Exhibitor preferences.  
Setup > Exhibitors > **Exhibitor Preferences**  
Exhibitor preferences let you control the following:
  - Whether hotels may be booked in the Exhibitor Resource Center (ERC)
  - Whether email invoices are sent as PDFs
  - Default payment terms
  - The number of automatically generated attendee registration codes each exhibitor type can generate

4. If you plan to divide your exhibitors into two groups for management purposes (such as groups of internal and external exhibitors), set up tabs for these two groups. This step must precede other setup tasks and the addition of exhibitors.  
Setup > Exhibitors > **Exhibitor Preferences**  
(For more information, see [7: Internal Demonstration Setup](#) on page 2.)
5. If you plan to import exhibitor data, create data import templates.  
Setup > General > Imports & Exports > **Import Templates**
6. Set up or edit templates for email messages sent to exhibitor owners or other exhibitor participants.  
Setup > General > Email Messages > **Predefined Emails**
7. As desired, create custom fields to help you track exhibitor information within the Conference Administrator, and assign the fields to custom field locations.  
Setup > General > **Custom Fields**  
You can display custom fields on these pages in the exhibitor record:

This exhibitor record page	Displays fields assigned to this custom field location
Exhibitor Information	Exhibitor Admin Info
Company Profile	Exhibitor Public Company Info (Admin)

(If you plan to use EventLink, you may want some of these fields to be used to match attendees with exhibitors. For information on EventLink setup, see the *EventLink Guide*.)

### 2: Exhibitor Sign-up Pages

1. Create exhibitor package groups.  
Setup > Exhibitors > Packages > **Exhibitor Package Groups**
2. Create exhibitor packages.  
Setup > Exhibitors > Packages > **Exhibitor Packages**
3. Create your exhibitor policy as a text file and upload it.  
Setup > Exhibitors > General > **Policy**
4. Choose information to display in the Exhibitor Resource Center during the online application process.  
Setup > Exhibitors > **ERC Path**  
You can choose which fields display and which are required. You can also customize the steps that display in the registration path.
5. As desired, create custom fields that you want to display on pages in the ERC, and assign the fields to custom field locations.  
Setup > General > **Custom Fields**  
You can display custom fields on these ERC pages:

This ERC page	Displays fields assigned to this custom field location
ERC Welcome Page	Login (ERC)
Create Account	Exhibitor Registration Primary Owner Info Form
General Information	Exhibitor Public Company Info Form (Fields added to this location also display on the Company Information page in the ERC and in the public Exhibitor Catalog.)
Exhibitor Policy	Exhibitor Policy Page

<b>This ERC page</b>	<b>Displays fields assigned to this custom field location</b>
Credit Card Payment	Exhibitor Credit Card Payment
Confirmation	Exhibitor Confirmation

### 3: Attendee Registration Codes

Set up registration code rules for the attendees and booth staff from exhibiting companies.

Setup > Exhibitors > **Reg Code Rules**

### 4: Exhibitor Participants

1. Set up roles to assign to participants who help plan or manage exhibit booths.  
Setup > Exhibitors > Exhibitor Participants > **Participant Roles**
2. If desired, configure rules to automatically assign roles to exhibitor participants.  
Setup > Exhibitors > Exhibitor Participants > **Auto Role Assignment**

### 5: Exhibitor Tasks

1. Create types for exhibitor tasks.  
Setup > Exhibitor > Exhibitor Tasks > **Task Types**
2. Create exhibitor tasks.  
Setup > Exhibitor > Exhibitor Tasks > **Tasks**
3. Assign tasks to certain exhibitor roles.  
Setup > Exhibitor > Exhibitor Tasks > **Map Tasks**
4. If you want exhibitors to complete a task on a page within the ERC, first create a custom field location for each ERC page and then add the custom field fields you want to display on the page.  
Setup > General > **Custom Fields**

### 6: Booths

1. Create a map of your exhibit hall for upload and send it to ActiveEvents.  
Follow these guidelines:
  - The map should be simple without a lot of extra detail (for example, do not show electrical plans).
  - Show each booth in the correct location, and include the booth ID.

- Save the file in PDF, JPEG, or EPS format.
  - For more information about exhibit hall maps, talk to your ActiveEvents Business Analyst.
2. Add exhibit booths.  
Setup > Exhibitors > **Booths**

### 7: Internal Demonstration Setup

If you plan to use ActiveEvents Conference to manage internal demonstrations or exhibitors from your own company, complete these tasks:

1. Set up a call for demos.
  - If desired, add custom fields to the call for demos page and create an additional page.  
Setup > General > **Custom Fields**  
Add custom fields to the **Call for Demos Step 1** custom field location. To create an additional page, add fields to the **Call for Demos Step 2** location.
  - Set up a Call for Participation web site and choose to allow demo submission.  
Setup > Content > **Call For Papers**
  - Enable the Call for Demos.  
Setup > Exhibitors > **Call for Demos**
2. Create internal demo exhibitor types.  
Setup > Exhibitors > General > **Types**
3. Create internal exhibitor roles.  
Setup > Exhibitors > Exhibitor Participants > **Participant Roles**
4. Specify which exhibitor types and roles you want to manage under a separate internal tab:  
Setup > Exhibitors > **Exhibitor Preferences**

### 8: Search & Reporting Preferences

1. If desired, set up search preferences for exhibitor searches.  
Setup > General > Search Preferences > **Exhibitor Search Prefs**
2. If desired, choose which custom fields can be included on custom exhibitor reports.  
Choose Setup > General > Custom Fields > **Custom Field Locations**, then choose the **Exhibitor Custom Reporting Fields** location.

### 9: Advanced Exhibitor Setup

#### IMPORTANT

Consult with your ActiveEvents Business Analyst as you set up or edit advanced settings. Additionally, be aware that some settings are also used for attendee registration payments.

1. Set up the credit card payment processor.  
Setup > Exhibitors > Payments > **Payment Processor**
2. As necessary, edit payment states.  
Setup > Exhibitors > Payments > **Payment States**