Conference 4.9
Exhibitor Quick Reference

This quick start guide outlines the basic workflow for key Exhibitor administration and management tasks in the WingateWeb 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 PDF documents at http://www.wingateweb.com/support

To set up and manage Exhibitors, complete these tasks:

1: Completing Exhibitor Setup

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

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 Internal Demonstration Setup on page 2.)

5. If you plan to import exhibitor data, create data import templates.

   Setup > General > Imports & Exports > **Data 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 General Information
Company Profile	Exhibitor Public Company Profile

   (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 "EventLink" in the "Registration Setup" chapter in the *Registration Guide*.)

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	Exhibitor Registration Landing Page
Create Account	Exhibitor Registration Create Account Form
General Information	Exhibitor Registration Exhibitor Info Form (Fields added to this location also display on the Company Information page in the ERC and in the public Exhibitor Catalog.)

This ERC page	Displays fields assigned to this custom field location
Exhibitor Policy	Exhibitor Registration Policy Page
Credit Card Payment	Exhibitor Registration Credit Card Page
Confirmation	Exhibitor Registration Confirmation Page

Attendee Registration Codes

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

Setup > Exhibitors > **Reg Code Rules**

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**

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 fields you want to display on the page.

   Setup > General > **Custom Fields**

Booths

1. Create a map of your exhibit hall for upload and send it to WingateWeb.

   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.
   - Talk to your WingateWeb Project Manager for more information about exhibit hall maps.

2. Add exhibit booths.

   Setup > Exhibitors > **Booths**

Internal Demonstration Setup

If you plan to use WingateWeb 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**

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.

Advanced Exhibitor Setup

IMPORTANT
Consult with your WingateWeb Project Manager 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**

2: Signing Up an Exhibitor

NOTE
To create a new exhibitor record, you must have a System Administrator or Exhibitor Administrator security role on your user account.

After you complete exhibitor setup tasks, exhibitors can sign up for your event through the Exhibitor Resource Center web site. As necessary, you or your exhibitor management staff can complete the sign-up process on behalf of an exhibitor.

1. Create an exhibitor record and specify the owner.

   Exhibitor > **Add New**
2. On the General Exhibitor Information page, change the status to **Approved**.
3. Complete the company profile and contacts.

   In the exhibitor record, choose these options on the left navigation bar:

   Edit Exhibitor Info > **Company Profile**
   Edit Exhibitor Info > **Contacts**
4. Choose booth or marketing packages.

   In the exhibitor record, choose Edit Exhibitor Info > **Invoices** on the left navigation bar, then click **Add an Invoice** and choose packages.
5. Enter the payment information or send an invoice.

   On the invoice page, choose **Invoice Options**
6. Assign the exhibitor to a booth.

   In the exhibitor record, choose Edit Exhibitor Info > **Booths** on the left navigation bar.

3: Managing Exhibitor Records

NOTE
To complete Management tasks, you must have a System Administrator, Exhibitor Administrator, or Exhibitor Owner security role on your user account.

After an exhibitor has signed up for your event, you can complete these management tasks, as appropriate.

1. Search for existing exhibitor records.

   Exhibitor > **Search**
2. On the General Exhibitor Information page, change the status or edit custom fields, as appropriate.
3. Add invoices.

   In the exhibitor record, choose Edit Exhibitor Info > **Invoices** on the left navigation bar, then click **Add an Invoice** and choose packages.
4. Update invoices, packages, and payments.

   Edit Exhibitor Info > Invoices > **Invoice Options**
5. Send invoices and order confirmations.

   In the exhibitor record, choose these options on the left navigation bar:

   Edit Exhibitor Info > Invoices > **Print Invoice**
   OR
   Edit Exhibitor Info > Invoices > **Email Invoice**
   OR
   Edit Exhibitor Info > Invoices > **Email Confirmation**
6. As necessary, complete tasks on behalf of the exhibitor.

   In the exhibitor record, choose Exhibitor Tasks > **All Tasks**

   (For details on the Add/Delete Registrants task, see 4: Registering an Exhibitor’s Attendees below.)

4: Registering an Exhibitor’s Attendees

NOTE
To complete exhibitor registration tasks, you must have a System Administrator, Exhibitor Administrator, or Exhibitor Owner security role on your user account.

After an exhibitor has signed up for your event, that exhibitor can register their attendees using the Add/Delete Registrants task. As necessary, you or your exhibitor management staff can complete attendee registration on behalf of an exhibitor.

1. If necessary, create Registration Codes for Exhibitor Participants. (If you configured Reg Code Rules for exhibitor types as explained in Attendee Registration Codes on page 2, the codes are automatically generated for each exhibitor.)

   In the exhibitor record, choose Exhibitor Admin Tasks > **Create/Edit Reg Codes** on the left navigation bar.
2. Register attendees.
   - In the exhibitor record, choose Edit Exhibitor Info > **Registration** on the left navigation bar.
   - Under the registration code to which you want to add a registrant, click **ADD/DELETE**.
   - Complete the **First Name**, **Last Name**, **Title**, and **Email** fields for each person you want to register with this registration code.
   - If requested, enter complete payment information.

5: Viewing and Exporting Leads

If the exhibitor rented a lead capture unit from WingateWeb, you can view and export the exhibitor’s leads during or after the event.

In the exhibitor record, choose Exhibitor Admin Tasks > **View Leads** on the left navigation bar and then click **Export**.

6: Running Exhibitor Reports

1. View exhibitor leads by day or other lead reports about retrieval devices, retrieval order, and terminal IDs.

   Reports > Exhibitor > **Lead Reports**
2. View basic information about exhibitors.

   Reports > Exhibitor > **Exhibitor Basic Info**
3. View exhibitor files for downloading.

   Reports > Exhibitor > **Exhibitor Files Report**
4. View payment transactions for exhibitor orders.

   Reports > Exhibitor > **Exhibitor Payment Transactions**
5. View the completion status of tasks for approved exhibitors.

   Reports > Exhibitor > **Exhibitor Task Report**
6. View the schedule for staff that are working booths.

   Reports > Exhibitor > **Participant Schedule**
7. View the participants who have not registered for the event.

   Reports > Exhibitor > **Participants Not Registered**