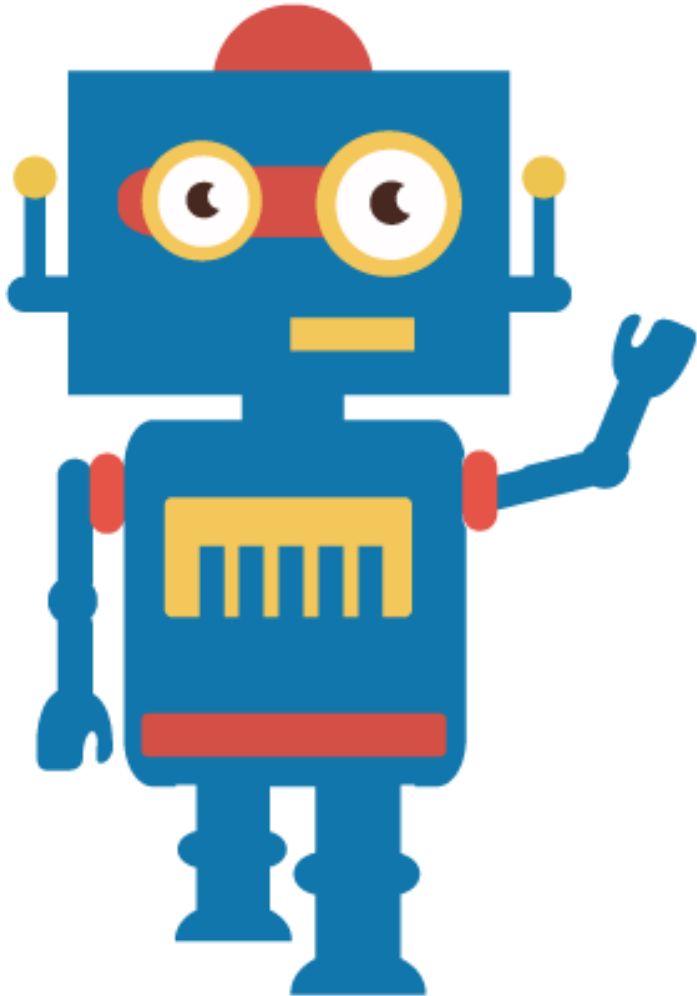




# Event Setup Basics

#WLSummit

# Meet the Presenters



✦ **Laura Alin**, *Onboarding Specialist*  
• [laura.alin@weblinkinternational.com](mailto:laura.alin@weblinkinternational.com)

✦ **Sabrina Sides**, *Onboarding Specialist*  
• [sabrina.sides@weblinkinternational.com](mailto:sabrina.sides@weblinkinternational.com)

# Details

Quick Actions <<



profile quick search ?

- [Find a member](#)
- [Find an organization](#)
- [Find an individual](#)
- [Create a new member](#)
- [Create a new prospect](#)

Profiles

Events

Tasks & Projects

Revenue

Web Content

Saved Queries

[Back](#)

## Edit Event

Event ID: 236

### WebLink Association Annual Conference

Save

1). Event Details - Long Description - Dates


[View event on website](#) | [Help](#)

### Event Details

Event Title:

Location:

Directions:  Show map on event page

Event Image: 

Date & Time: Event Starts    Event Ends

Calendar Type:  Organizational Event  Community Event  Members Only Event  Internal Event

Event Type:

Event Email:

# Event Setup, Section 2 - *Pricing*

- ✂️ What is the pricing structure for this event?
- ✂️ Will there be a “second set” of registration options using Custom Fields?
- ✂️ Is there early-bird pricing?
- ✂️ Will attendees earn CEUs?

# Event Setup, Section 3 - Settings

✳️ Max/Minimum Attendee Fields

✳️ Attendee and Revenue Goals

✳️ Signup Confirmation - *Emails* –  
*use this to your benefit!*

✳️ Closing Registration

✳️ Hiding Event from Online Calendar

Additional Text For Confirmation Message: ? Preview Confirmation Message

**B** *I* U (inherited font) (inherited size)


</> Image: 247527\_998623373... Template: Jacquie's Signature

Thank you for your registration! Please make your room reservations as soon as possible, our reserved block pricing expires on 10/15/2014. You can call 888-789-4561 or email Jacquie Shaffer at [jacque.shaffer@weblinkinternational.com](mailto:jacque.shaffer@weblinkinternational.com) for assistance.

In preparation for the conference, please review our [Tips for Successful Conference Participation](#).

If you need to cancel your registration, you must do so by 10/1/2015 to receive a refund. Cancellations after this date are not guaranteed for refunding.

We look forward to seeing you in New Jersey on October 23rd!



# Event Setup, Section 4 – *Registration Form Options*

✱ Gather Information - *Signup vs. Attendee Fields*

✱ Use Custom Fields for:

- Meal Choices
- Breakout Session Options
- Disclaimer Agreement
- Other ideas?

## Registration Settings

### Standard Fields

Field Name	Visible	Required
Email Address	Both Sign Up and Attendees ▼	Required For Sign Up And Attendee ▼
Prefix (Mr., Mrs., etc.)	Hidden ▼	Not Required ▼
First Name	Both Sign Up and Attendees ▼	Required For Sign Up And Attendee ▼
Last Name	Both Sign Up and Attendees ▼	Required For Sign Up And Attendee ▼
Name For Badge	Attendees Only ▼	Not Required ▼
Company Name	Both Sign Up and Attendees ▼	Required For Sign Up And Attendee ▼
Title	Both Sign Up and Attendees ▼	Required For Sign Up And Attendee ▼
Address	Sign Up Only ▼	Required ▼
Phone Number	Sign Up Only ▼	Required ▼

# Event Setup, Section 5 – Sponsors

- ✿ Sponsor Recognition = ROI Reporting
- ✿ ROI Reporting = Happy Sponsors
- ✿ Happy Sponsors = More Sponsor \$

## Sponsors

Walgreens  
Presenting Sponsor

*Walgreens*

Zach's Bait Shop  
Welcome Sponsor

*The Baitshop*

# Event Setup, Section 6 – *Project Creation*

## ✂️ Create Project to Oversee Event Coordination

- Assigns To-Dos Appropriately
- Keeps Timeline
- Reporting
- Time Tracking

<input checked="" type="checkbox"/> Started	Date Started	Date Due	<input type="checkbox"/> Completed	Date Completed	Sold By
	8/ 1/2014	11/11/2014		1/ 1/1900	jshaffer

Tasks	Notes C	Notes B	Notes A	Custom Fields	Project Description	Notify	Details	Task Legend
New Task    Delete Task    View Selected Tasks    Extend Due Dates								
Drag a column header here to group by that column								
Date Due	Closed	Assigned To	Task Description					
8/8/2014	<input checked="" type="checkbox"/>	jchalmers	Hold Event Meeting to discuss assigned tasks					
8/15/2014	<input type="checkbox"/>	jon	Reserve the location					
8/22/2014	<input type="checkbox"/>	jon	Add event to WLC Calendar					
8/19/2014	<input type="checkbox"/>	lbashaw	Mail Paper Invitations					



# Event Setup, Section 7 – *Promo Codes*

✂ Flat Rate vs. Percent Discount

✂ Use limits and start and end times to control promo code usage

✂ Use staff email addresses for internal contests

✂ Export Usage Report!

**Edit Promo Code**

Promo Name:

Code (Unique per event):   
Spaces, apostrophes and non-alphanumeric characters (except '-', '\_', '@', and '.') are not allowed. Valid examples: jondoe@gmail.com, discount\_08, pc-482

Adjustment Type:

Discount Amount:   \$ or  % off event item price

Applies to:	Event Item	Applies
	Early Bird Full Conference Registration (Includes one attendee with Tuesday night activity)	<input checked="" type="checkbox"/>
	Full Conference Registration (includes 1 attendee with choice of Tuesday night activity)	<input checked="" type="checkbox"/>
	Spouse Registration (Includes choice of Tuesday night activity)	<input checked="" type="checkbox"/>

Usage Limit:   
A value of zero (0) indicates unlimited usage.

Starts:  Now  
or  
 9/9/2015

Ends:  when registration closes  
or  
 9/9/2015

# Event Dashboard Overview

✂ Snapshot of Event Data

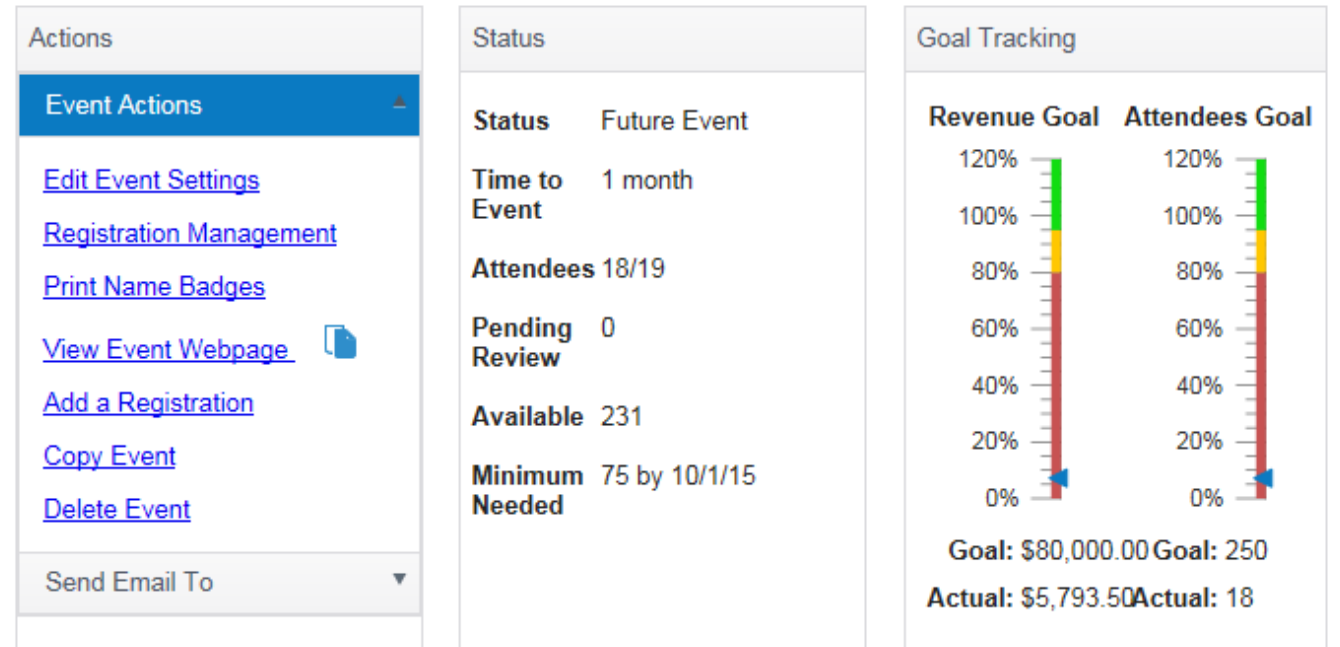
✂ Attendee Counts – *Overall and by Event Item*

✂ Goal Tracking – *Attendees and Sales*

✂ Shortcuts to Frequently used Actions

## WebLink Association Annual Conference

Friday, October 23, 2015 - Saturday, October 24, 2015



**Questions?**



# Additional Information

## **Handy How-To Articles for Event Setup**

[www.weblinkuniversity.com](http://www.weblinkuniversity.com)

## **Your Video Training Resources for Event Setup**

[www.weblinksupport.com](http://www.weblinksupport.com)