

Event Presentation Prep

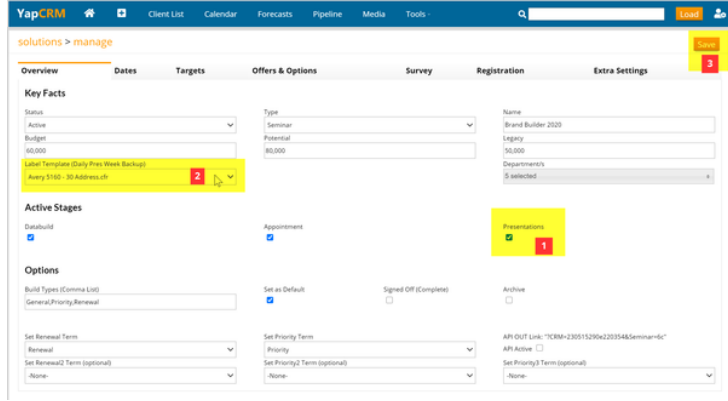
N.B. Left click any image to expand:

Event Setup - Admin User level

In the Menu, click **Event**, click **Admin Solutions**.

1. Tick the **Presentation** stage in the Event Setup.
2. Select the appropriate label template. We recommend printing tests to ensure the layout is correct. Please contact YapCRM if you need support.
3. Click **Save**

Fig.1



Contingency Planning

To mitigate any internet issues, YapCRM recommends creating backups for the following day's event. We don't recommend doing this across multiple days as contacts may reschedule to another day.

- Create PDFs of:
 - the name badges for the attendees
 - export the sessions to Excel
 - Copies of the Session Planner
 - PDF of the Presentation Matrix Tool
- Send SMS if appropriate to the delegates for the following day.

Name badges

There are two methods: via the Search screen Fig.2 and via the Matrix - click here for the Matrix section.

1. Click **Event**
 2. Select appropriate session
 3. Click **Search**
 4. Click the tick box to select all contacts
 5. Click **Label**
- The template selected in the Admin Solutions will be preset. Click **Generate** Fig.3.
 - Click **Download** - depending on file size this may take time Fig.4 (1).
 - Save PDF file or print as required Fig.4 (2).
 - Repeat for applicable sessions.

Fig.2

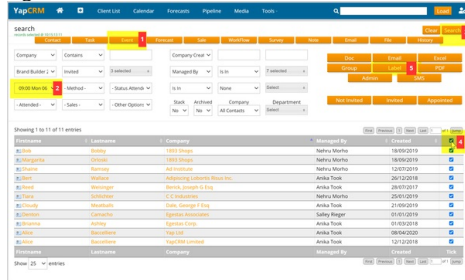


Fig.3

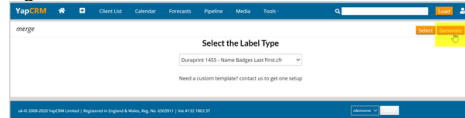
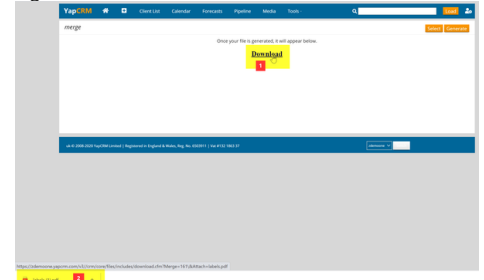


Fig.4



Export sessions to Excel

From the Search screen Fig.5:

1. Click **Event**
2. Apply filters as required and click **Search**
3. Select all records
4. Click **Excel**

- Choose which fields you want to include in your export to support the event if internet goes down during the event. Click **Export** Fig.6.
- Click **Download** and save the file as required.

Fig.5

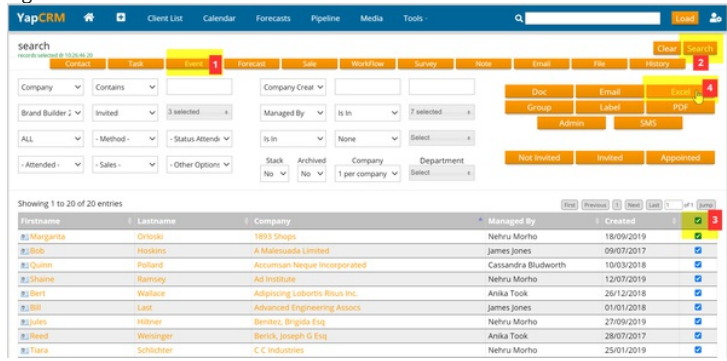
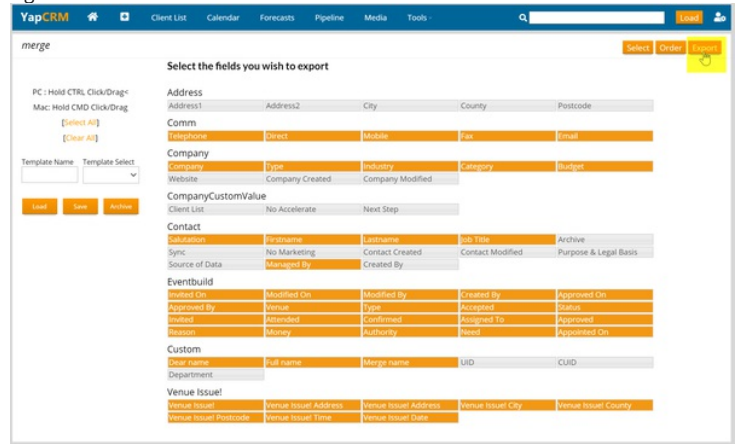


Fig.6



Session Planner Report

Click **Events**. Click **Reports**. Click **Session Planner** Fig.7. Click **PDF** Fig.8. Save the file as required.

Fig.7

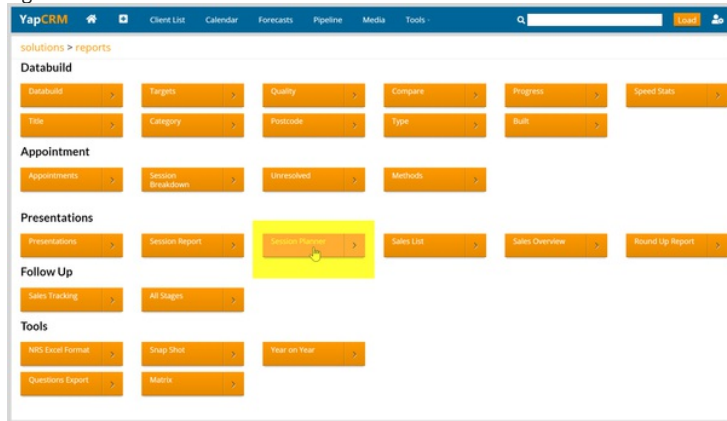
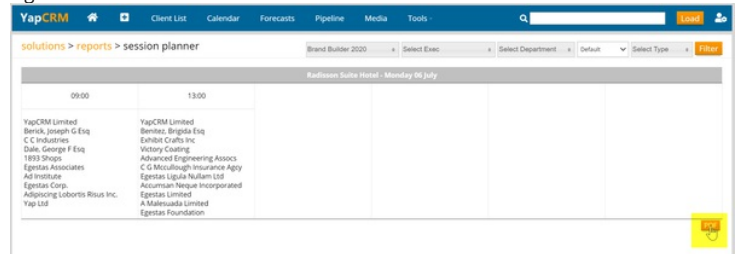


Fig.8



PDF of Matrix

Click **Events**. Click **Presentation Tool**. Select Standard View Fig.9 (1), appropriate session Fig.9 (2) and click **Filter** Fig.9 (3). Click **PDF** Fig.9 (4). Save file as required. Repeat for sessions as required.

Fig.9

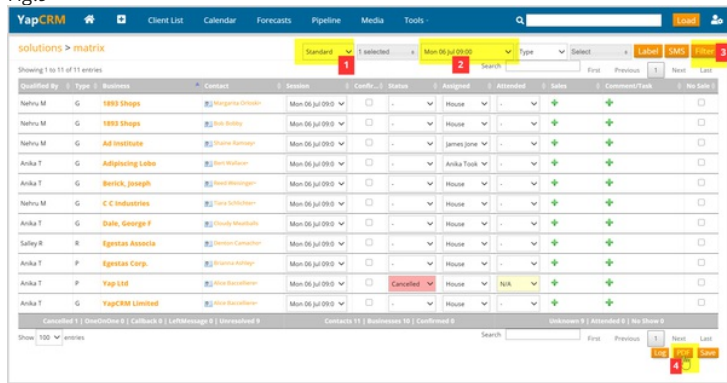


Fig.10

Matrix Report > 06-Jul-2020 09:00 AM									
Qualified By	Type	Business	Contact	Session	Confirmed/Status	Assigned	Attended	Comms	No Sale
Sally R	R	Egestas Associa	Denton Canacho-	Mon 06 Jul 09:00	[]	[]	[]	08358 284 662	[]
Anika T	P	Egestas Corp.	Brianne Ashley-	Mon 06 Jul 09:00	[]	[]	[]	07660 554 840	[]
Anika T	P	Yap Ltd	Alice Baccelloni-	Mon 06 Jul 09:00	[]	Cancelled	[]	N/A	[]
Nehru M	G	1893 Shops	Margarita Ornelas-	Mon 06 Jul 09:00	[]	[]	[]	11111 111 111	[]
Nehru M	G	1893 Shops	Bob Hobbs	Mon 06 Jul 09:00	[]	[]	[]	01215 422 453	[]
Nehru M	G	Ad Institute	Shane Ramsey-	Mon 06 Jul 09:00	[]	[]	James Jones	08847 648 997	[]
Anika T	G	Adipiscing Lobo	Bert Wallace-	Mon 06 Jul 09:00	[]	[]	Anika Took	08964 969 382	[]
Anika T	G	Berick, Joseph	Reed Weisinger-	Mon 06 Jul 09:00	[]	[]	[]	01243 678 286	[]
Nehru M	G	C C Industries	Tara Schlachter-	Mon 06 Jul 09:00	[]	[]	[]	01270 562 265	[]
Anika T	P	Egestas Corp.	Cloudy Mouthalls	Mon 06 Jul 09:00	[]	[]	[]	01416 686 933	[]
Anika T	G	YapCRM Limited	Alice Baccelloni-	Mon 06 Jul 09:00	[]	[]	[]	01 782 257 481	[]

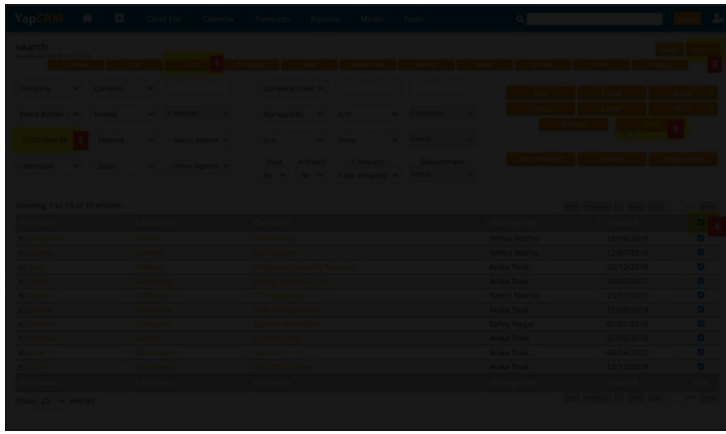
Sending SMS

From the Search screen. Click **Events** Fig.11 (1). Select the appropriate session Fig.11 (2). Click **Search** Fig.11 (3). Tick to select all records Fig.11 (4). Click **SMS**.Fig.11 (5)

Select template and click **Load** if applicable Fig.12 (1). Otherwise type message into the Editor field Fig.12 (2). Click **Preview** Fig.12 (3).

Fig.11

Fig.12



The Preview will show which messages will be sent; those with no number are crossed through. Check that any merge codes show correctly. Click **Schedule** Fig 13.

Check telephone number is correct and set date and time as required. Click **Send SMS** Fig.14

Fig.13

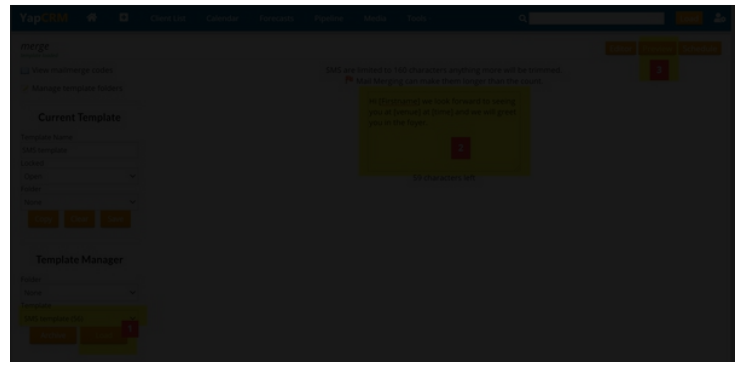
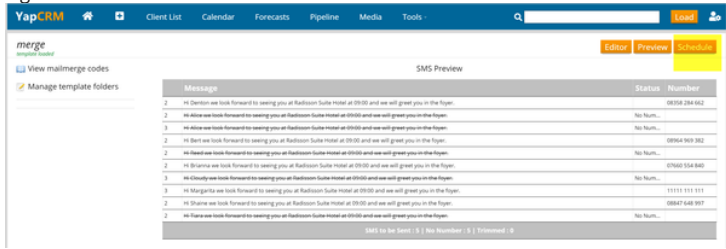


Fig.14

