

eventability

User Guide

www.event-ability.com



Contents

INTRODUCTION	3
EVENT ABILITY LISTINGS (FREE)	4
SETTINGS	4
USE THE CROPPING FUNCTIONALITY	4
ENTER YOUR GOOGLE GEOCODING API KEY	5
EVENT ABILITY TICKETS	10
WOOCOMMERCE	10
EVENT EMAILS	11
PAY BY INVOICE	12
CHECKOUT FORMS	12
TICKET BUILDER	13
ATTENDEES	14
BADGE DESIGNER	16
TICKET CHECKIN	16
BULK ACTIONS	17
CONFERENCE MANAGER	19
SPEAKERS	19
TALKS	21
EVENT CONFERENCE OPTIONS	22
AGENDAS	23
PARTNERS MANAGER	26
CREATE A NEW PARTNER	26
EVENT PARTNERS OPTIONS	27
INTERACTIVE FLOORPLAN	29
FLOORPLAN FRONT END EDITING	30
EVENT FLOORPLAN OPTIONS	30

INTRODUCTION

EventAbility offer five separate Wordpress plugins each of which add some specific exhibition or conference functionality to your existing Wordpress website. By utilising all of these plugins together you can make adding conferences, speakers, sponsors and exhibitors to your website a job anyone in your team can do. You can even use it to sell your tickets online and manage all of your attendees.

Other event systems do exist, but they tie you in to expensive contracts and if you want to leave you need to start from scratch with a new site. By creating all of our plugins for WordPress we aim to create sites that can be run by you and your team.

EventAbility makes it as easy as possible for users to set up event sites with maximum functionality with minimal setup. However it is expected that users should have at least an intermediate working knowledge of using Wordpress. Contact us if you or any of your team require training in using Wordpress, WPBakery Page Builder, WooCommerce or any of the EventAbility Plugins.

Each plugin has a section within this guide detailing the plugins functionality and how you can set it up. It is recommended that you read this and ensure the plugins do what you require before purchasing as we cannot offer refunds where the user has purchased the wrong product.

[**www.event-ability.com/training**](http://www.event-ability.com/training)

We can also help you with the initial design and setup of your site if required.

If you would like us to help setup and run your site on an ongoing basis we also offer Managed Services.

[**www.event-ability.com/managed-service**](http://www.event-ability.com/managed-service)

In order to help you effectively manage your events every item you add through our plugins, from agendas and speakers, to attendees will be connected to an event. This is required whether you are using your site to run one event or 100 events.

It is important that you select the correct event when adding any items, if you do not select an event the most recent event created will be selected for you.

Event Ability will automatically create your first event on installation. You can either rename this event or just create a new one.

EVENT ABILITY LISTINGS (FREE)

The event listings plugin provides the base for all other EventAbility plugins. It allows you to create events from within the Wordpress admin. Each event can have various settings including dates and location as well as customised content.

You can list and search your events and with a wide variety of display options including displaying them on a map.

Each event will automatically have its own page created along with a header that contains the event logo and navigation for any other event related pages.

If you are not using the plugins to list multiple events and do not wish to have the automatic event header and navigation you may choose not to use this event page. In this situation you can create all of your pages manually using shortcodes or WPBakery Page Builder to add your content to pages.

SETTINGS

EVENT ABILITY -> SETUP OPTIONS

USE THE CROPPING FUNCTIONALITY

By selecting “Yes” on this option Event Ability will add an cropper when uploading images on any of it’s post types.

Use the cropping functionality
 ☒ Yes
 ☐ No

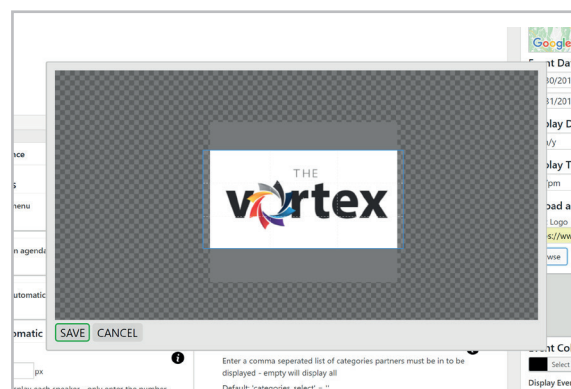
This can save a huge amount of time when uploading many speaker photos and company logos allowing smart consistent cropping without having to use external tools like Photoshop.

When you upload a logo or photo this is initially done through the standard Wordpress Media Manager.

- **Tip: Avoid recropping an already cropped logo in the media manager or your changes will affect everywhere you are using this logo which may not be desired. It may be better to upload the logo again.**

If you are using the cropping option a crop box will now open over your admin page - use your mouse scroll wheel to zoom the image in and out. You can click in the blue bordered crop area to drag the area to to be cropped. Or click the logo outside the area to drag the logo. Logos are fixed sizes and formats.

Once you have selected the area you want to crop, scroll down and click “save”. Your cropped logo should now appear in the preview area.



In some cases if larger images are being scaled down you may need to scroll down the page to the logo / image being cropped.

- **TIP: regularly click the publish / update button to ensure your changes are saved and go live**

If you prefer not to use the cropping option and instead use the standard Wordpress setup you can change this under the settings.

ENTER YOUR GOOGLE GEOCODING API KEY

Enter your Google Maps JavaScript API here.

This is required if you would like Event Ability to generate location data when you enter an address for your event. Without this you will not be able to display upcoming events on a map.

Enter your Google Geocoding API key

AlzaSyB50tv7QHk99bf3V5

To obtain an API key you will need to setup a Google Account and follow the instructions

<https://developers.google.com/maps/documentation/javascript/get-api-key>

Google does require payment details for your account but provides a large quota of API calls for free so unless you have a large amount of traffic you should not be charged.

See <https://cloud.google.com/maps/platform/pricing/sheet/> to see when you would be charged.

CREATING AN EVENT

To create an event from the wordpress admin menu, simply click...

EVENT ABILITY -> EVENTS -> ADD NEW

WITHIN THE EVENT ADMIN PAGE...

Give your event a name in the “Enter title here” field.

Enter any content you want your main event page to have below using the regular Wordpress editor. Or if you are using WPbakery Page Builder you can click “Backend editor” and add your content here.

- **Tip: You can click the “permalink” at any time to view this event page**

Set the Location

Enter the address of your event in the fields provided in the “Event Details section” to the right. The address will appear within your event header automatically.

If you are using the google maps API you can click “Reset Marker” and the map will center on the address given.

- **Tip: If you wish to use the maps functionality you will need to setup a Google account and enable the Maps JavaScript API. Once you have an API key you can enter it in the settings area**

Set the Dates

Click the start date field and use the calendar to select a day for the event. You can use the sliders beneath to set a start time. Do the same for the end time.

If you chose to display a list / map with “Upcoming” events events will display until the end time is reached.

Example Expo
Permalink: <http://www.event-ability.com/events/example-expo/> Edit

Event Address

Address Line 1
Address Line 2
City / Town
Geneva
Switzerland
Map
Reset Marker
Lausanne
Thonon-les-Bains
Annemasse
Geneva
Oyonnax

January 2019

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Time 09:30 am
Hour

You can use the “Display Date Style” dropdown field to select a format for your dates to display in the header and on listings i.e. this may be an American style or European style, using words or just numbers.

Set the Logo

In the “Upload an Event Logo” section you can click “browse” to open the wordpress media manager. Here you can select and upload a logo.

If you are using the cropping option a crop box will now open over your admin page - use your mouse scroll wheel to zoom the logo in and out drag the logo. You can click in the blue bordered crop area to drag the area to to be cropped. Or click the logo outside the area to drag the logo. Logos are fixed sizes and format.

Once you have selected the area you want to crop scroll down and click “save”. Your cropped logo should now appear in the preview area.

- **TIP: regularly click the publish / update button to ensure your changes are saved and go live**

In some cases if larger images are being scaled down you may need to scroll down the page to the logo / image being cropped.

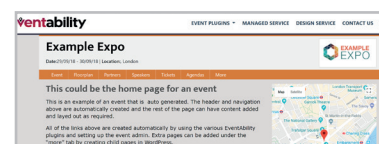
If you prefer not to use the cropping option and instead use the standard Wordpress setup you can change this under the settings.

Event Colour

Click this field and use the colour picker to select a colour for your event. This will affect the colours on the header of your event page.

Display Event Header

“Display Event Header on all related pages”. When this is checked any pages produced by EvenAbility will have the event page header applied to the top. In this way event navigation and logo are carried onto all related pages i.e speakers, agendas, partners etc.



Child Pages

The event page can be treated as the homepage of a mini event site if required. Further plugins can add pages such as speakers, tickets, partners etc which can be created automatically. However, you can also add additional custom pages by using the Wordpress “Child Page” functionality.

EVENT ABILITY -> EVENTS -> ADD NEW

WITHIN THE EVENT ADMIN PAGE...

Initially this will create a new event admin page, however you can ignore all settings here. Simply use the “Parent” dropdown under “Page Attributes” to select the event you are making a child page for. This will turn this into a child page for that event.

Update / Publish this page. All other event options should now disappear leaving you with a page you can edit as usual. This page will now appear in your event mini site navigation under the dropdown “More”.

DISPLAYING EVENTS

Display as a Map

Maps can be displayed on any page using the methods below. They are created with google maps and each event will display at its location with an icon. Clicking the event will take you to that page.

You can choose to show a map with many events, or select just one specific event to show on its own page.

Using WPBakery Page Builder or Site Origins Page Builder

Within the desired wordpress page open page builder and select the “EventAbility Maps” element.

The options will be the same as for the shortcode listed below, but in a much easier to use visual format.

Using Widgets

If you have widget areas setup in your theme you can use the EventAbility Maps widget to get easily select the events to show on the map.

Using a Shortcode

You can add a map using standard wordpress shortcodes with the following shortcode and options.

Example Map Shortcode...

[eventmap list_title = “Event Map” selection_method = “show_selected” selected_events = “127,325,287”]

Event Map Shortcode - Generic Options

Enter a title for this section

```
list_title = “Enter a title if required”
```

Choose how many events to display here

```
display_amount = “6”
```

Optional - enter a zoom level for the map - 1-22 (By default the map will try to auto fit all events selected)

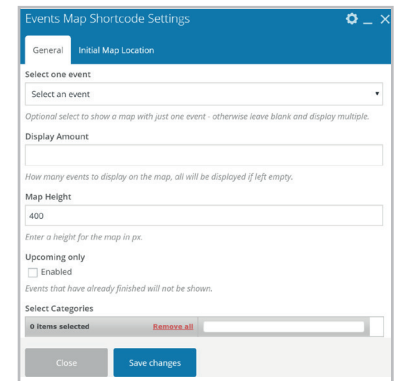
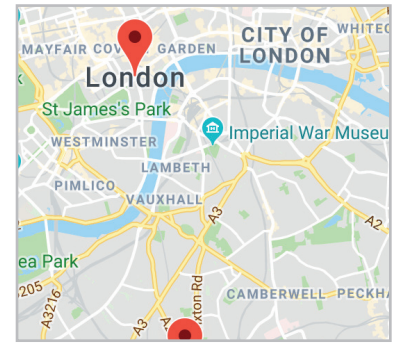
```
zoom = “9”
```

Optional - enter a latitude to center the map (By default the map will try to center on all events selected)

```
center_lat = “51.50294”
```

Optional - enter a longitude to center the map (By default the map will try to center on all events selected)

```
center_lng = “-0.11381”
```



Event Map Shortcode - Selection Options (Enter one of these 3 and choose sub-options)

Display all events (max 200)

selection_method = "show_all"

Only display events whose end dates have not yet passed

only_show_upcoming_events = "yes"

Choose what to order your event display by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display events in selected categories

selection_method = "show_categories"

Enter a comma separated list of category ID's

selected_categories = "1342, 1654"

Choose what to order your event display by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display specifically chosen events

selection_method = "show_selected"

Enter a comma separated list of event ID's

selected_events = "1322, 1154"

Display Event List

Events can be listed on any page using the methods below. Options allow for different display formatting, and search functionality can be added if required. You can use AJAX loading if you are displaying many events and loading them all at once slows your site. In this situation events will load as the user scrolls down.

Using WPBakery Page Builder or Site Origins Page Builder

Within the desired wordpress page open page builder and select the "EventAbility Event Listing element".

The options will be the same as for the shortcode listed below, but in a much easier to use visual format. Selecting categories and events is possible with a drag and drop interface.

Using Widgets

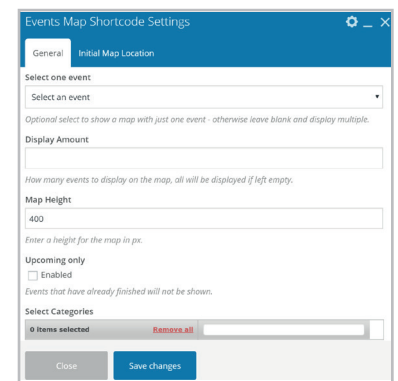
If you have widget areas setup in your theme you can use the EventAbility Event Listing widget to get easily select the events to show n your page.

Using a Shortcode

You can display events using standard wordpress shortcodes with the following shortcode and options.

Example shortcode...

[eventlist only_show_upcoming_events="yes" categories_select= "72,76,23" searchable="true" columns="three" order_by= "title" order= "ASC" auto_load="true"]



Event List Shortcode - Generic Options

Enter a title for this section

list_title = "Enter a title if required"

Choose how many events to display here

display_amount = "6"

Event List Shortcode - Display Options (Enter one of these 3 and choose sub-options)

Display event logos in a slider

display_option = "slider"

How many logos the slider show at one time

display_amount_slide = "5"

Size the logos to fill available space

auto_size = "yes"

If auto_size = "no"

Choose a standard size for a slider logo

slide_size = "small"

slide_size = "medium"

slide_size = "large"

Slide logos horizontally (default is vertical)

show_horizontal = "yes"

Display event logos in a simple list

display_option = "list"

Add a search box to this list
(only use one per page)

searchable = "yes"

Enter yes if you want to load more as the
user scrolls (only use one per page)

auto_load = "yes"

How wide in pixels should the logo appear

logo_size = "200"

Display events details in columns

display_option = "columns"

Add a search box to this list
(only use one per page)

searchable = "yes"

Enter yes if you want to load more as the
user scrolls (only use one per page)

auto_load = "yes"

Display a short text excerpt of the event

display_text = "yes"

Event List Shortcode - Selection Options (Enter one of these 3 and choose sub-options)

Display all events (max 200)

selection_method = "show_all"

Only display events whose end dates
have not yet passed

only_show_upcoming_events = "yes"

Choose what to order your event display by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display events in selected categories

selection_method = "show_categories"

Enter a comma seperated list of category ID's

selected_categories = "1342, 1654"

Choose what to order your event display by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display specifically chosen events

selection_method = "show_selected"

Enter a comma seperated list of event ID's

selected_events = "1322, 1154"

EVENT ABILITY TICKETS

WOOCOMMERCE

WooCommerce is a free ecommerce plugin for Wordpress. Event ability uses this to setup your payment gateway and handle transactions. You will need to download and install this to your site and carry out basic setup. WooCommerce offer great documentation on how to set this up.

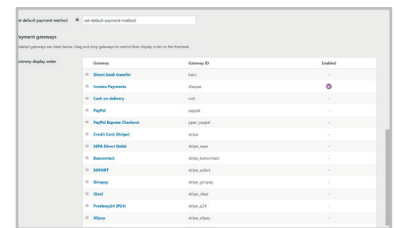
<https://WooCommerce.com>

Some key points when using WooCommerce with Event Ability

Payment Gateway

WOOCOMMERCE -> SETTINGS -> CHECKOUT

WooCommerce must be connected to a payment gateway that allows funds to be taken and transferred to your account. Many options are available and further plugins can offer even more options.



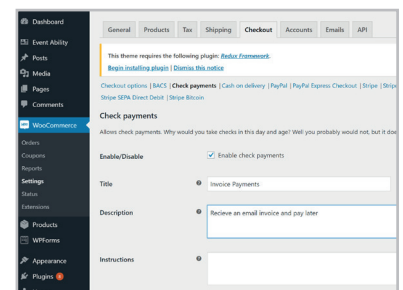
Checkout Type Limitations

Some checkout options may offer an “Express” checkout or similar. These must not be selected as Event Ability Extends the standard WooCommerce checkout to collect ticket information and create attendees.

Any checkout options that skip the standard WooCommerce checkout will prevent the Event Tickets Plugin from functioning.

Invoicing

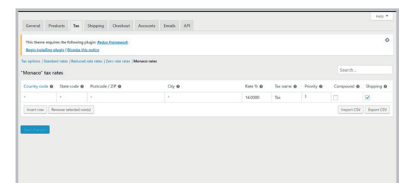
If you would like your customers to be able to select an option at the checkout to receive an invoice and pay later you must add the checkout option “Check Payments” to the checkout. It is advised to edit the title of this to “Invoice Payments” or similar and change the description as suits your requirements.



Taxes

WooCommerce allows you to setup taxes in a variety of ways which will suit most needs. However if you run events in different countries you may need to ensure that different events collect taxes appropriate to the country.

WOOCOMMERCE -> SETTINGS -> TAX



On this page find the field - “Additional tax classes” and add an extra line to the list with a name for the tax you need. After saving this page you can now find your new tax option listed at the top of the page. Open this link - click “add row” - enter tax rate required under “rate”

This rate will now be available to select when setting up an event.

Emails

WooCommerce delivers standard emails to site admins when orders come in as well as to customers confirming their orders, sending invoices etc. You can alter which emails are sent and how they look.

WOOCOMMERCE -> SETTINGS -> EMAILS

Products

When you create a ticket with Event Ability it adds a “product” to WooCommerce which is an item that you can now sell in your online store.

WOOCOMMERCE -> PRODUCTS

If needed a product can be amended after creation e.g if the ticket name, prices or discounts change you may also want to add a product description. Other settings should not be amended to ensure the plugin works correctly.

Testing

Always ensure you test all aspects of your store before running your event to ensure payments are taken properly and attendee data is collected as expected.

EVENT EMAILS

WITHIN THE EVENT ADMIN PAGE...

There are three main emails your customers will receive from Event Tickets.

You may want to add some details unique to each event to the emails your customers receive. Within the event settings you will find a box labeled event emails. Here you can add content that will appear below the relevant emails: Invoice Email, Payment Confirmation Email, Attendee Email.

Invoice Email

This is sent to the purchaser if they selected “pay by invoice” it will contain details of the order and a link for them to pay online later.

Payment Confirmation Email

This is sent to the purchaser if the order is completed. It will contain details of the order.

Attendee Email

This is sent to each attendee for whom the purchaser has bought a ticket, confirming that they have been bought a ticket for the event and providing the event details - including the date and location. This can contain ticket details including a checkin barcode if you select this option within the ticket builder.

PAY BY INVOICE

WITHIN THE EVENT ADMIN PAGE...

Event Ability can add an option to the checkout for customers to receive an invoice instead of paying at the time.

This is done by adding the option “Check Payments” to the checkout. See “WooCommerce Invoicing”.

If a customer selects this option at the checkout they will receive an invoice email which contains a link that they can follow to pay online later.

The system will create the attendees on the system but their status will be set to “on-hold” until the invoice is paid. If you receive payment in another way you can edit the order to “completed” and this will update all of the attendees to completed.

WOOCOMMERCE -> ORDERS

CHECKOUT FORMS

WITHIN THE EVENT ADMIN PAGE...

In order to create attendees on the system, Event Ability must collect data about each of the attendees the purchaser is buying tickets for. The minimum required fields are “First Name” “Last Name” and “email”. On top of these you can create extra form fields to collect the data you need about your attendees. Two Form areas are added to each event admin where you can edit the fields.

You can rename and reorder your fields as you like but **if you delete a field from your form any data users have already entered for this field will be lost.**

Fields can be added by clicking the buttons at the top of each form builder.

- Textfield - Single line text field
- Text Area - Longer text responses
- Radio Field - Select single option
- Checkbox - Multi-select checkbox option

Once a field is added you can...

- Enter text for the title.
- Select “required” to make the field require a response before checkout can be completed.
- Drag and drop the questions to rearrange the order.
- Check Box and Radio fields will have another button “Add Option” with which you can add an option and enter text for it.

- **TIP: regularly click the publish / update button to ensure your changes are saved and go live**

General Event Form Builder

This form appears at the start of the checkout process and data collected here is added to every attendee in the order.

Individual Attendee Form Builder

A copy of this form will appear for each attendee so different data can be collected for each attendee.

TICKET BUILDER

WITHIN THE EVENT ADMIN PAGE...

Within the event admin page you find another box entitled ticket builder. Here you can create all of your tickets, set up discounts and create a ticket sales page / grid.

Initially there are several options to select.

Create Tickets Page Automatically

This will add a menu item to your event header that links to a page with a shop grid of all tickets and any other products you link to this event. It will display current prices and indicate prices when staged discounts are applied. Hovering each ticket will reveal what is included in the product description area.

Select a Tax Rate

Any additional tax rates you create (see WooCommerce - taxes) can be selected in the dropdown here. Leave blank to use your standard WooCommerce tax setup.

Email Attendees

When selected all attendees entered by the purchaser will receive an email confirming that have been bought a ticket for the event, along with the event details.

Include Ticket / Barcodes

When selected the email attendees receive will include a barcode which they can print and bring to the event. This can be used to check them in with a barcode scanner if you are using the check in system.

Set Discount Dates

Here you can set a series of staged discount periods. Between the dates that you set, tickets will be discounted. Prices return to normal once a discount is run. The amount tickets are discounted is set when you create tickets.

- Click - "Create a discount stage"
- Enter a start date with the time/date picker
- Enter an end date with the time/date picker
- Enter a title for discount e.g "Early Bird Special"
- **Tip - The discounts will reorder as you set the dates**

Ticket Type	Price	Normal Price
Gold Pass	£245	£400
Day One Ticket	£150	£300
Extras		
Conference Materials	£70	£80

Discount Stage	Start Date	End Date	Title
Early Bird One	04/08/2018 12:00 am	05/10/2018 12:00 am	
Early Bird Two	05/10/2018 12:00 am	06/22/2018 12:00 am	

Add Tickets

EVENT ABILITY -> EVENTS -> YOUR EVENT -> TICKET BUILDER -> ADD EVENT TICKETS AND TICKET GROUPS

- Enter a name for your ticket
- Enter a price for your ticket

A field appears below for each of the discount stages you have created - in each of these fields enter the amount that you would like to reduce the price by for this ticket. (This is the actual currency amount, not a percentage).

If this is a ticket, leave checked the box **"Check if this is ticket"** this will ensure Event Ability creates an attendee on the system and collects data for this product. Unchecking will create a product linked to the event but without any ticket functionality.

Click **"Create an event Ticket"** and your ticket will be added to a list beneath.

- **TIP: regularly click the publish / update button to ensure your changes are saved and go live**

After saving you will be able to click **"Edit Product"** if you want to make any changes to your ticket. This will open the ticket in WooCommerce. Avoid changing most settings but you can alter the price, discount amounts, title and set a description if required.

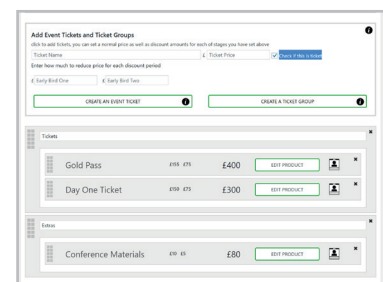
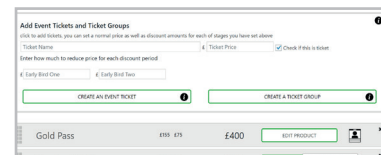
Group & Rearrange

Groups can be used to visually organise your tickets on the ticket grid page e.g you may want to group tickets for different conference days together.

Click **"Create a Ticket Group"** and your group will be added below.

Once you have added your tickets and any groups required you can drag and drop them to add tickets to groups and reorder tickets and groups

- **If you have selected to create a ticket page automatically you can now find this ticket grid from your event header menu.**



ATTENDEES

Every ticket purchased creates an attendee on the system linked to the event the ticket was for. If you need to you can make any changes to their ticket details here.

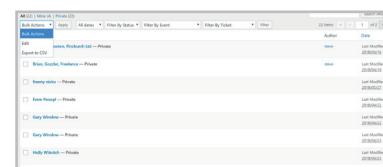
EVENT ABILITY -> ATTENDEES

Filter

Within the list of attendees you can use the additional filters to select attendees within a specific event and / or with specific tickets.

Export

Once you have filtered to a specific event or more detailed you can select the option **"Bulk Actions" -> "Export to CSV"** to export the data of the selected attendees.



Event Title

EVENT ABILITY -> ATTENDEES->YOUR ATTENDEE

This is set automatically by the attendee names and should not be changed

First Names

Change this as required

Last Name

Change this as required

Job Title

Change this as required

E-mail

This is required to send tickets and messages to attendees

Company

Change this as required

Ticket

If required you can select a different ticket for the attendee. this will not affect any part of the WooCommerce order.

Order ID

This is the link to the WooCommerce order that created this attendee.

Badge / Unique ID

A unique code generated for each attendee.

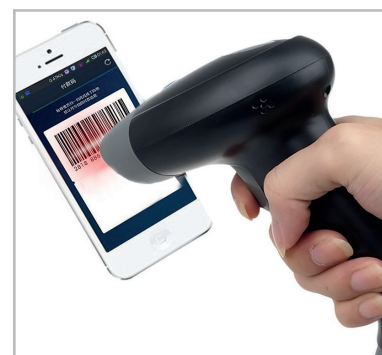
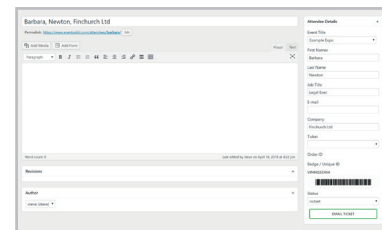
Attendee Barcode

A barcode image based on the unique ID is generated on attendee creation. This can be emailed to attendees and used to check them in when they arrive at the event,

Attendee Status

These are initially set by the WooCommerce order. As the order changes this status will update. If you want to override the status for a particular attendee you can change this on the dropdown. It will not affect the WooCommerce Order. The primary status that EventAbility will display are...

- On-hold - The order has been created but not yet paid for
- Processing - Payment is processing
- Completed - The order has been paid for
- Cancelled - The order has been cancelled
- Checked-In - The Attendee has been checked in at the event



Email Ticket Manually

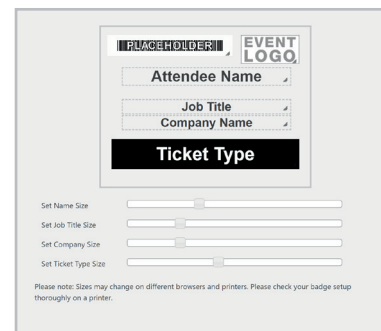
If you would like to manually send a confirmation email to this attendee click **"Email Ticket"**. If you have barcodes set within your event settings this will be included.

BADGE DESIGNER

EVENT ABILITY -> BADGE DESIGN

Here you can select which elements you would like to appear on your badge layout. You can set the sizes of all elements and drag and drop them within your badge to create a layout. This design will be presented when attendees check-in at your event and you will have the option to print it.

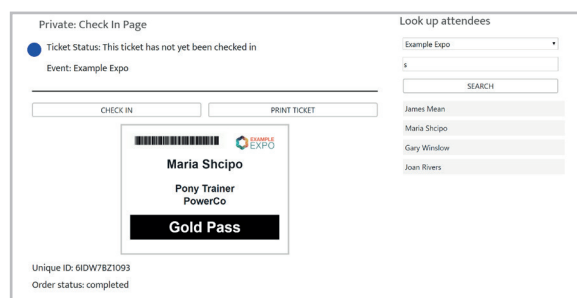
- Enter a width for your badge to print in mm
- Enter a height for your badge to print in mm
- Show event logo on badge
- Show event barcode on badge
- Show name on badge
- Show job title on badge
- Show company on badge
- Show ticket type on badge



TICKET CHECKIN

You will find a page titled "Check In Page" within your Wordpress pages. this private page can only be seen by logged in administrators, Event Managers or Registration Staff.

If you view this page in the front end you will find a page that you can use to check in attendees as they arrive at your event.



Ticket Checkin **relies on an internet connection to your website**. If you cannot guarantee a good internet connection during your event you should export your attendee data and use another system.

Select an Event

Set the dropdown **"Select an Event"** to limit the checkin to only attendees against your current event.

Search Attendees

To locate an attendee for your event by searching their name or company you can type part of their name or company into the search field and click **"Search"**. This will display a list of matching attendees below. Clicking one of these attendees will pull their details in to the main checkin window and badge layout.

Barcode Scanner

If you have a USB scanner setup with your computer and you included barcodes in your attendees emails you can quickly scan the barcodes and this will pull their details in to the main checkin window and badge layout.

- **Not all barcode scanners may be compatible with the system. You should thoroughly test your system before using it at an event**
- **Tested with “Eyoyo Barcode Scanner (Version 3)”**

Attendee Check-in

Once you are displaying the data of your attendee you can also see their “Ticket Status”.

If a ticket has not yet been paid for you will see a warning here. Similarly if a ticket has already been checked in you will see a warning. If you wish, you can override the warning and check-in the attendee anyway. You can click **“Check In”** to update their status in the system.

Printing

Once a ticket is checked in you have an option to “print badge” this will open your browser’s window and attempt to print the badge as you have set it up in the badges designer.

Different browsers & printers can scale / print differently so you should thoroughly check your setup before running your event to be sure it functions as required. Set up your printer with correct stock and settings. We recommend using Google Chrome in Kiosk mode to speed up the print process once you are happy with your setup.

BULK ACTIONS

EVENT ABILITY -> ATTENDEE BULK ACTIONS

Here you can run a variety of tasks that can help you manage your attendees. By selecting certain ticket status and ticket types you can filter which attendees the bulk action is applied to.

Attendee Bulk Actions

Select the bulk action you would like to perform

Export to CSV

You must select one event to include

Example Expo

Select ticket status

You can select multiple status - if left blank only completed attendees will be exported

☐ Unconfirmed

☐ Pending

☒ Completed

☒ Checked in

☐ Ticket

☐ Cancelled

☐ Refunded

☐ Shipped

Select A Ticket

You can select multiple ticket types - otherwise all will be exported

☐ Conference Materials

☒ Day One Ticket

☐ Good Pass

Run the Process

Email Tickets

If you chose not to send tickets / confirmations on purchase you can manually send them here later. Or if you want to resend to ensure delivery.

To send tickets to multiple attendees within an event.

- Select **“email tickets”** from the dropdown
- **“Select an Event”** - you must select one
- Select multiple ticket status to include - optional
- Select Ticket Types to include - optional
- Click **“Run the Process”** - tickets will be emailed to all those selected

Email Notifications

If you have an important notification you want to send to all or some of your attendees you can send a customised email here. This will be sent in a basic html template with your event logo.

- Select **"Broadcast Email"** from the dropdown
- **"Select an Event"** - you must select one
- Enter **"Email Subject"**
- Enter **"Email Text"**
- Use the variables `{{first_name}}` and `{{last_name}}` within the text to insert the attendees name.
- Select multiple ticket status to include - optional
- Select Ticket Types to include - optional
- Click **"Run the Process"**

Export Data

You can export all of your attendee data from one event, this will include any form data that your attendees entered on the checkout. This will be exported as a CSV that can be opened in most spreadsheet programmes including Excel.

- Select **"Export to CSV"** from the dropdown
- **"Select an Event"** - you must select one
- Select multiple ticket status to include - optional
- Select Ticket Types to include - optional
- Click **"Run the Process"**

CONFERENCE MANAGER

The Conference Manager plugin creates three new post types in wordpress; Speakers, Talks and Agendas. All of these integrate together, with an event that you select and with any other Event Ability plugins.

Together these allow you to easily manage and display all of the conference information relating to your event.

SPEAKERS

Every speaker gets their own page on the site, but their details can also be displayed in a variety of ways; in sliders, popups and lists. By linking speakers to talks they can be displayed on agendas or they can be linked to and display on Partners.

Create a Speaker

EVENT ABILITY -> SPEAKERS -> ADD NEW

- Title - Leave this blank. It will be created by the speakers name etc
- Content - Enter any content you want on your speaker's page
- Name - Enter first and last names appropriately
- Email - Enter an email for your speaker
- Phone Number - Enter an phone number for your speaker
- Photo Crop - Upload a speakers photo
- Logo Crop - Optional - upload a speaker logo - only displays if this option is chosen on the event
- Set the Event

Displaying Speakers List

Using WPBakery Page Builder or Site Origins Page Builder

Within the desired wordpress page open page builder and select the "EventAbility Speakers" element.

The options will be the same as for the shortcode listed below, but in a much easier to use visual format. Selecting categories and speakers is possible with a drag and drop interface.

Using Widgets

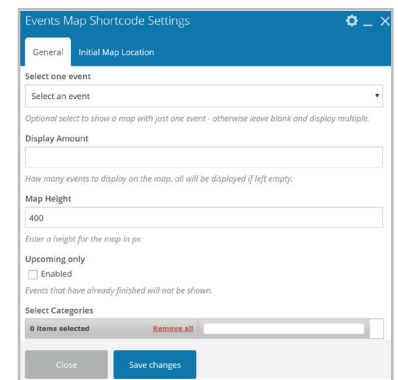
If you have widget areas setup in your theme you can use the "EventAbility Speakers" widget to easily select the speakers to show on your page.

Using a Shortcode

You can display speakers using standard wordpress shortcodes with the following shortcode and options.

Example shortcode...

```
[speaker_select event_id_select="232" selection_method="show_categories"
selected_categories="252" order_by="title" order="ASC" display_text="yes"
show_logo="yes" popup="yes"]
```



Speakers Shortcode - Generic Options

Enter a title for this section

list_title = "Enter a title if required"

REQUIRED! - Select the event you want to display partners from

event_id_select = "1523"

Choose how many partners to display here (max 200)

display_amount = "30"

Display details in a popup on clicking the images

popup = "yes"

Display a logo beside the speaker photo (If one has been set)

show_logo = "yes"

Speakers Shortcode - Display Options (Enter one of these 3 and choose sub-options)

Display speakers images in a slider

display_option = "slider"

How many images to show at one time

display_amount_slide = "5"

Size the images to fill available space

auto_size = "yes"

If auto_size = "no"

Choose a standard size for a slider image

slide_size = "small"

slide_size = "medium"

slide_size = "large"

Slide logos horizontally (default is vertical)

show_horizontal = "yes"

Display speakers logos in a simple list

display_option = "list"

Display speaker name, job title and company

show_details = "yes"

Display speaker details when cursor hovers over the images

hover_content = "yes"

How wide in pixels should the images appear

speaker_size = "200"

Display speakers details in columns

display_option = "columns"

Display speaker name, job title and company

show_details = "yes"

Display speaker details when cursor hovers over the images

hover_content = "yes"

Display a short text excerpt of the speaker

display_text = "yes"

Speakers Shortcode - Selection Options (Enter one of these 3 and choose sub-options)

Display all speakers (max 200)

selection_method = "show_all"

Choose what to order your speakers by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display speakers in selected categories

selection_method = "show_categories"

Enter a comma separated list of category names

selected_categories = "cat 1, cat 2"

Choose what to order your speakers by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display specifically chosen speakers

selection_method = "show_selected"

Enter a comma separated list of speakers ID's

selected_partners = "1322, 1154"

TALKS

Talks are the building blocks of your agendas with each one representing a session of a speaker or group of speakers. You can use the agenda builder to quickly create talks on a specific agenda or you can create them manually and then link them to an agenda later

- **Tip: For most situations it is easier to create your talks initially in the agenda builder and edit them here later**

EVENT ABILITY -> TALKS -> ADD NEW

Start time

Enter a start time for the talk with the time picker

End time

Enter an end time for the talk with the time picker - This is required if you are using intending to use multi-agenda displays.

Talk Type - Dropdown Select

Talk

This is the standard talk type containing speakers.

Break

Use this session type to indicate a gap between regular talks e.g. "Lunch".

Header

You may wish to split up your day's agenda into sections. Use this to display a header above a group of talks. The start time should be set to the beginning of the first talk. The end time should be set to the end of the last talk in the group.

Link talks visually

You can also visually group your talks together. By using this dropdown you can make a talk the top of the group, in the middle or at the bottom of the group.

- **Tip: This is much more easily done from the agenda builder where you can visualise the links**

Add Icon

Select an appropriate icon that represents the talk type taking place - appears beside the timings.

Custom Class

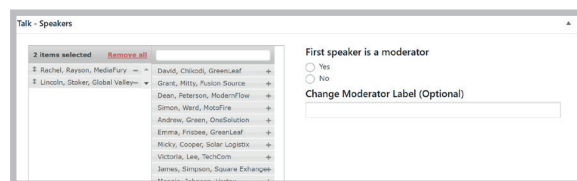
Add a css class that you can use to apply unique css stylings to a specific talk.

Event Title

Important - select the correct event for this talk otherwise it will not appear in your agenda builder, and the correct speakers will not be available.

Speakers

All speakers for your event should be listed on the right hand column. Drag / click to move them to the left column to associate them with this talk. You can drag and drop them in the left column to reorder.



Associated speakers will appear on agendas and talk pages as well as listing the talks / agendas on the speakers pages.

First speaker is a moderator

Select to highlight the first speaker and display the title “Moderator”

Change Moderator Label

Optional - Type in any word to replace the “Moderator” title.

EVENT CONFERENCE OPTIONS

Within your event admin page you will find a new box “Options for Event Conference” here you have several options to affect how the conferences display on your event site.

Add agendas to event menu

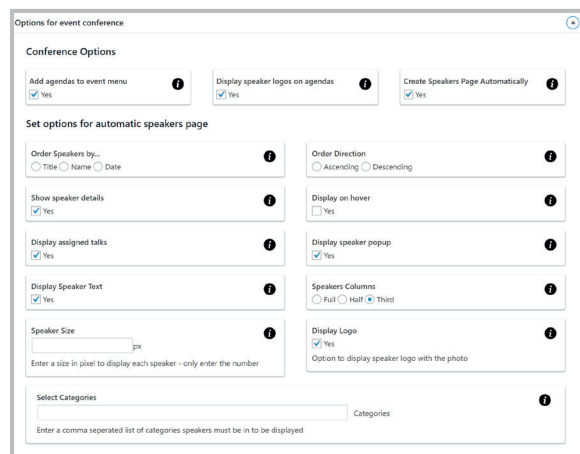
Select this to automatically add a dropdown menu to your event page linking to any agendas that you have created, associated with this event.

Display speaker logos on agendas

Select this to display logos for speakers next to their photos. This will appear on any auto pages such as a speakers page, a popup or an agenda.

Create Speakers Page Automatically

Automatically add a menu item to your event page that links to a page listing speakers associated with this event. The settings here are a reduced version of those available under “Displaying speakers list WPBakery Page Builder”.



AGENDAS

Agendas represent all of the talks going on during a day, normally within one room / area. They should not have overlapping talks. You can set up as many separate agendas as you need if you have overlapping streams of agenda. Each will display with it's own page but you can also choose to create a multi-agenda page that will display them all side by side.

Set the title as usual. Any content you add will appear above your agenda on its individual page.

EVENT ABILITY -> AGENDAS -> ADD NEW

Icon

You can use the cropper to upload and add an icon to your agenda this will be in a square format and we recommend using a transparent background PNG image where possible.

Date

Select the day that this agenda is taking place on. It should be a single day during your event.

Location

You can type in the name of a specific area / room within your venue to help attendees find where this agenda is taking place.

Colour

Use the colour picker to select an event colour. This will affect the agenda header and help to distinguish different agendas on a multi-agenda page.

Agenda Builder

- **TIP: regularly click the publish / update button to ensure your changes are saved and go live**

This is powerful tool to help you quickly create and edit your agendas online. You can quickly create new talks or pull through any already associated with this event. Drag and drop them to rearrange and visually join talks into a group.

Select Existing Talk

Click **Select Existing Talk** and then use the dropdown to select an existing talk. Click **Add to Agenda** - a new talk will appear below, at the top of any others in your agenda. You can now drag this to the correct position.

It is possible to put the same talk on multiple agendas if you require. However it is important to note that any **changes to the talk i.e timings, title etc will affect all instances / agendas you use this talk in.**

Create a New Talk

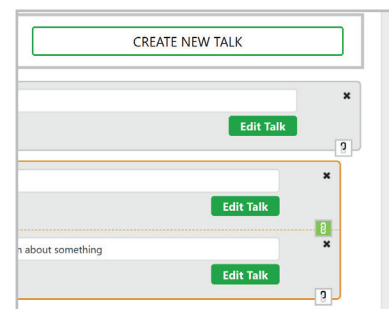
Click **Create New Talk** - a new blank talk will appear below, at the top of any others in your agenda

- Set the title
- Enter a start time
- Enter an end time
- Select “Talk Type” with the dropdown i.e talk, break, header
- Drag all talks to the appropriate order
- **Headers should be dragged above the first talk they relate to but ensure the timings match the start of the first grouped talk and the end of the last grouped talk.**

Visually Group Talks

Once your talks are in the correct order you can visually group them by clicking the link symbol on the bottom right of a talk. This will join it to the below talk, continue to do this for as many talks as appropriate.

By default this will join talks with a visual border in the colour of your agenda on your front-end agenda page.



Remove Talks

Click the cross in the top right of a talk to remove a talk. This will remove it from the agenda but leave it available in your talks list.

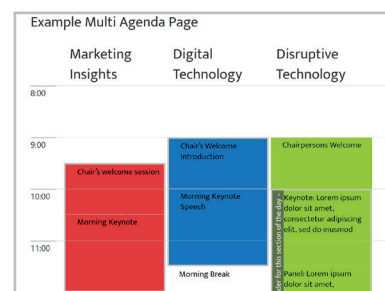
Editing Talks

Once you have saved / published your agenda with some talks you can click the “edit talk” button on each talk. This will open the admin page for this talk. Here you can add extra content details to the talk and select any speakers that need to be added.

Displaying Multi Agendas

You can create a multi-agenda widget to select several agendas and display them on a single multi-page agenda. The talks will all layout on a single timeline according to the times you have set for them.

The colours of each agenda will display according to how you have setup the agenda admin page. Talk Headers will display vertically to the side of all talks that their time period is set for.



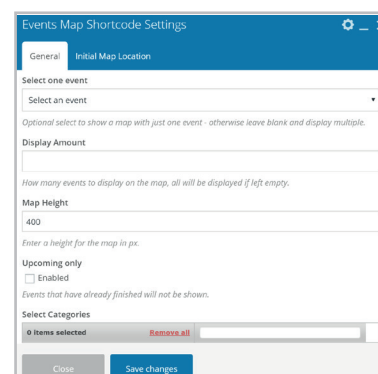
Only the talks titles display initially but clicking on any talk will create a popup displaying all of the talks details and speakers.

As you add more agendas the page will scroll horizontally if they go wider than the page.

Using WPBakery Page Builder or Site Origins Page Builder

Within the desired wordpress page open page builder and select the “EventAbility Agendas” element.

The options will be the same as for the shortcode listed below, but in a much easier to use visual format. Selecting categories and speakers is possible with a drag and drop interface.



Using Widgets

If you have widget areas setup in your theme you can use the “EventAbility Agendas” widget to easily select the agendas to show on your page.

Using a Shortcode

You can display multi-agendas using standard wordpress shortcodes with the following shortcode and options.

Example shortcode...

```
[agenda_select event_id_select= “1343” start_time_hour = “08:00 am” end_time_hour = 06:00 pm selected_agendas= “3762” ]
```

Multi-Agenda Shortcode - Options

Enter a title for this section

title = “Enter a title if required”

REQUIRED! - Select the event you want to display agendas from

event_id_select = “1523”

Enter an hour to start the grid the agendas appear on (Please use exactly the format below)

start_time_hour = “07:00 am”

Enter an hour to end the grid the agendas appear on (Please use exactly the format below)

end_time_hour = “06:00 pm”

Optional - Enter a height to make each hour on the grid (this will be in px)

hour_height = “70”

Choose the units you will define each agendas width by - e.g if you wanted 4 agendas you could set % and then set agenda_width to 25

agenda_width_units = “%”

Enter a width for each agenda on the grid (units set above)

agenda_width = “25”

Enter a comma separated list of the ID's of the agendas you want to display

selected_agendas = “124, 490, 285, 635”

PARTNERS MANAGER

The Partners Manager plugin creates a new post-type in wordpress labelled “Partners” here you can create a partner for each of your sponsors, exhibitors, media partners etc. You can keep track of all of their details including their payment status. This can also integrate with other Event Ability plugins including Interactive Floorplans to display your partners on a plan, and Conference Manager to connect speakers who are speaking on behalf of a Partner. Every partner gets their own page and can be displayed in flexible lists or in logo sliders.

CREATE A NEW PARTNER

EVENT ABILITY -> PARTNERS -> ADD NEW

Title

Enter the name of your partner

Content

Enter any text content describing your partner’s company

Stand No.

If your partner is exhibiting and has a stand number you may enter it here. You can also enter a text name if appropriate. Please note that in order to work with Interactive Floorplans the stand number / name must be exactly as it appears on the floorplan but the floorplan version will be with a full stop at the end e.g “143.”

Account Manager

To easily keep track of which of your sales team is dealing with each client you can assign an “Account Manager” by default this will be set to the user who first creates the partner but it can be changed by this dropdown if required.

Partner Website

Enter your partner’s website to provide a link to it from their page.

Event Title

Select the event this partner is associated with. Defaults to the most recent.

Is this an exhibitor?

Check this to mark that this partner is exhibiting at your event - this is required to show on an Interactive Floorplan.

Is the partner confirmed?

You may wish to add partners to your website before they are fully confirmed for a variety of reasons; they might be reserving a stand or you may just wish to make you show look busy.

By checking this option you can add a partner as usual, but keep track of who has actually confirmed and choose to display only confirmed or all partners in different places.

This can also affect the Interactive Floorplan allowing you to see which stands are really taken and which are only reserved.

Partner Logo Crop

Using the cropper you can quickly and easily upload a logo for this partner.

EVENT PARTNERS OPTIONS

EVENT ABILITY -> EVENTS -> YOUR EVENT

Within your event admin page you find a new box “Options for Event Partners”. Here you have several options to affect how your partners display on your event site.

Create Partners Page Automatically

When checked this will automatically create a child page for your event which displays a list of partners. A menu item for this page will be added to your event header.

Displaying partners list

Using WPBakery Page Builder or Site Origins Page Builder

Within the desired wordpress page open page builder and select the “EventAbility Partners” element.

The options will be the same as for the shortcode listed below, but in a much easier to use visual format. Selecting categories and speakers is possible with a drag and drop interface.

Using Widgets

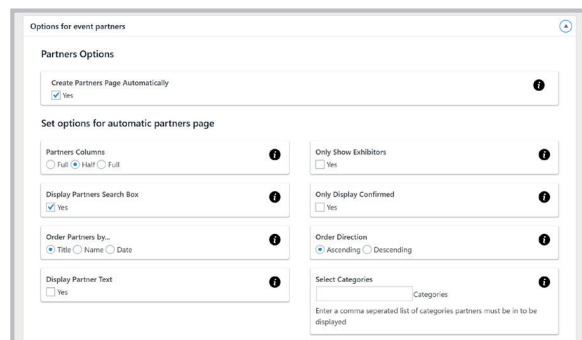
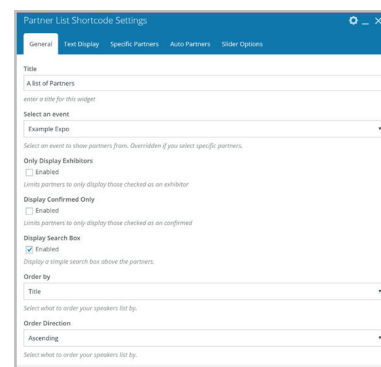
If you have widget areas setup in your theme you can use the “EventAbility Partners” widget to easily select the partners to show on your page.

Using a Shortcode

You can display partners using standard wordpress shortcodes with the following shortcode and options.

Example shortcode...

[partnerlist event_id_select= “342” selection_method=“show_categories” selected_categories=“25” order_by= “title” order= “ASC” display_text=“yes”]

Partner Shortcode Generic Options

Enter a title for this section

list_title = "Enter a title if required"

REQUIRED! - Select the event you want to display partners from

event_id_select = "1523"

Choose how many partners to display here (max 200)

display_amount = "30"

Only display partners that are checked as being exhibitors

exhibitors_only_select = "yes"

Only display partners that are checked as being confirmed

only_show_confirmed_select = "yes"

Partner Shortcode Display Options (Enter one of these 3 and choose sub-options)

Display partner logos in a slider

display_option = "slider"

How many logos the slider show at one time

display_amount_slide = "5"

Size the logos to fill available space

auto_size = "yes"

If auto_size = "no"
Choose a standard size for a slider logo

slide_size = "small"

slide_size = "medium"

slide_size = "large"

Slide logos horizontally (default is vertical)

show_horizontal = "yes"

Display partner logos in a simple list

display_option = "list"

Add a search box to this list
(only use one per page)

searchable_select = "yes"

How wide in pixels should the logo appear

logo_size = "200"

Display partner details in columns

display_option = "columns"

Add a search box to this list
(only use one per page)

searchable_select = "yes"

Enter yes if you want to load more as the
user scrolls (only use one per page)

auto_load = "yes"

Display a short text excerpt of the partner

display_text = "yes"

Partner Shortcode Selection Options (Enter one of these 3 and choose sub-options)

Display all partners (max 200)

selection_method = "show_all"

Choose what to order your partners by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display partners in selected categories

selection_method = "show_categories"

Enter a comma seperated list of category ID's

selected_categories = "237, 563, 782"

Choose what to order your partners by

order_by = "title"

order_by = "name"

order_by = "date"

Make the order ascending or descending

order = "DESC"

order = "ASC"

Display specifically chosen partners

selection_method = "show_selected"

Enter a comma seperated list of partner ID's

selected_partners = "1322, 1154"

INTERACTIVE FLOORPLAN

An interactive floorplan extends the partners plugin by allowing you to present any partners that are exhibiting at your event in a visual manner. Users and staff can search an exhibitor list and see where partners are on your floorplan and you can also quickly click a stand to see who is exhibiting there. You can also easily identify areas where you still have stands to sell.

To create your own floorplan you will need a copy of Adobe Illustrator. You may be able to create an SVG plan with other software but we cannot provide support for this.

The initial graphics can be tricky to create - if you are at all unsure please contact us to use our floorplan creation service.

Creating an SVG

The first step is to create a visual of your floorplan as an SVG file. We recommend using Adobe Illustrator to create this. How you style your floorplan is up to you but there are some key points to remember for it to work as an SVG floorplan.

Creating a stand

A stand must be an SVG "RECT" element in Adobe Illustrator you can create this by using the rectangle tool. Draw this to the size and shape required.

A stand must have a label - this is normally the stand number but it can also be text.

- The stand label must end with a full stop / period "."
- No other elements on the floorplan should end with a "."
- Stand labels must be unique

Create the label using the Type Tool in Adobe Illustrator. This should be a separate element to your stand. Drag the number / label over the stand to the required position. Selecting both elements group them together. In adobe Illustrator this is **object->group**

Repeat this for as many stands as you require, dragging your stands to where they are needed.

All 'rect' elements will be interactive, to avoid this you may want to make some background elements of your floorplan differently e.g cut a background rect with the "Scissors Tool" to turn it into a path.

- **Tip: The stand label must be entered exactly as the "exhibitor number" on a partners admin page for them to be linked - but with a fullstop (period) at the end.**

Saving the SVG

- Set css properties to style elements
- Do not compress SVG
- Save as svg 1.1
- **If you are unsure about creating an SVG graphic please contact us for training, or to use our floorplan creation service.**

FLOORPLAN FRONT END EDITING

When logged in as an Administrator, Event Manager, or Account Manager clicking on a stand will display options to edit the exhibitor / partner for that stand.

Add Exhib

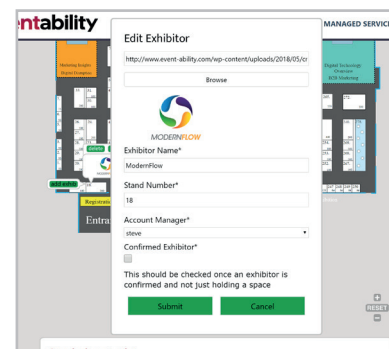
- Creates a new partner in the backend with this stand number
- Partner is set to be an exhibitor
- Temporarily sets the partner name to reservation "stand number"
- Temporarily adds a reserved logo to this partner
- Sets partner to unconfirmed
- Displays partner for you to edit
- Account manager is set to the currently logged in user

Edit

- Options to edit the partner
- Crop / add new logo
- Exhibitor Name - Enter your partners name
- Stand number - change this if you want to allocate to another stand
- Account manager - set to another user if required
- Confirmed Exhibitor - check this once ste partner is confirmed and not just reserving the space
- Submit - save changes and redisplay the partner logo

Delete

- Moves the partner to trash - If the trash is not emptied you will be able to restore if this was a mistake
- Removes partner from the floorplan



EVENT FLOORPLAN OPTIONS

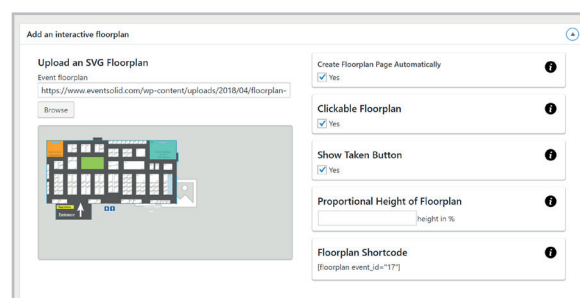
EVENT ABILITY -> EVENTS -> YOUR EVENT

Upload an SVG Floorplan

Using the Wordpress Media Manager you can very easily upload your floorplan and select it to use on this event

Auto Page on Event

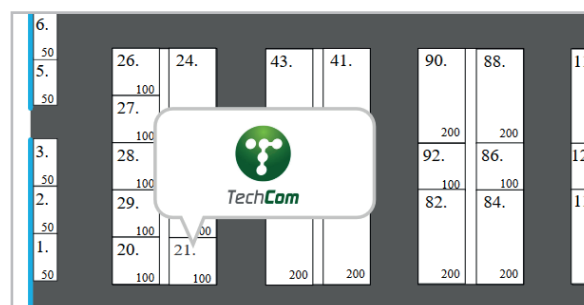
Automatically add a menu item to your event page that links to a page listing of all exhibitors and an interactive floorplan displaying them.



Clickable Floorplan

When this is selected customers can click stands on the floorplan. If a partner has the same stand number as this stand then the partners logo will display next to the stand.

This will always display for logged in Administrators, Event Managers and Account Managers and these staff will also have options to edit the partner or add new partners to empty stands.

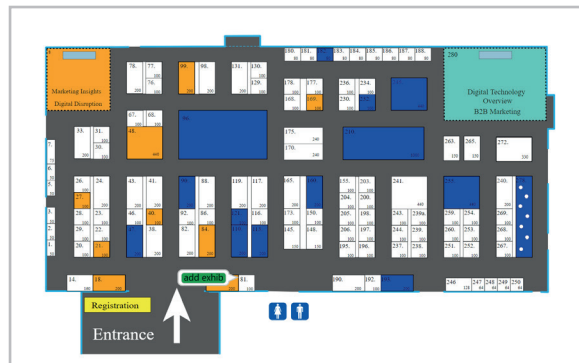


Show Taken Button

Quickly and easily show customers which stands are still available to buy.

Check this to display a button on the front end for your visitors. When they click this all stands which are already taken will be highlighted. This will always display for logged in administrators, event managers and account managers.

Staff members will be able to see this button regardless of this setting.



Floorplan Shortcode

A copy of the interactive floorplan with the exhibitor list can be placed on any page with the below shortcode, simply replace the event_id number with the id of your event.

Example shortcode...

```
[floorplan event_id_select= "342" selection_method="show_categories"
selected_categories="25" order_by= "title" order= "ASC" display_text="yes" ]
```