Best Practices – Event Registration Coordinator

Creating an Event in Bizzabo

1. There are 2 ways to create an event.
    a. Click the "Create Event" button
        i. This option works all the time, except when you want certain aspects of the event registration to be the same as other events, such as email templates, website format, etc.
    b. Duplicate an existing event
        i. Best for events that some or most of the aspects will remain the same.
        ii. Be cautious about whether the event is a free event. It's better to start from scratch unless you are duplicating another free dynamic event.
2. "Create Event"
    a. Multi Session Event
    b. Enter event name, start/end date/time, time zone, contact email (events@adventsource.org), category, registration type, attendance type, venue name and venue address.
3. Duplicating an existing event
    a. Enter event name, start/end date/time, time zone, contact email (events@adventsource.org), category, and attendance type.
    b. Choose what components to copy from the previous event
        i. Website & Mobile
        ii. Automated Email
        iii. Event Email Domain
        iv. Email Templates
        v. Registration Flows
        vi. Sponsors (if they are the same)
        vii. Exhibitors (if they are the same)
        viii. Agenda (if it is that same – you will have to adjust the date/time, so it might be better to export the agenda from the other event, edit the dates/times on the spreadsheet, then import on the new event.)
        ix. Speakers (if these are the same)
        x. Contacts (if it is necessary to contact these individuals from the past event)
        xi. Lists (if the contacts are the same and the classifications would be the same)
        xii. Polls (if the polls would be the same
        xiii. Tasks (if the speaker/sponsor/exhibitor portal tasks are the same)
4. Fill in the Basics "General Info" with the following info
    a. Tag - "AdventSource"
        i. For NAD events, tag "NAD" & "AdventSource"
    b. Event Contact Email – events@adventsource.org
5. Set up the ticket types
6. If there are multiple tickets that a customer can purchase, uncheck the "Limit to one registration per unique email address" & check "Limit to one registration per transaction" (This is necessary for the events that the event organizer is not willing to monitor and email the registrants who don't assign their tickets and complete the full registration form.)
7. Set the "Maximum number of registrations allowed"

8. Customize the display
    a. Display a "Back" option from registration form to ticket selection
    b. Allow attendees to reuse information from previous tickets in a single registration form
9. Create the registration form by setting up the registration flow
10. Assign tickets for the registration flow (If tickets have different registration questions, multiple registration flows are needed)
11. Change the color of the heading background to the NAD denim HEX#003b5c (the event organizer can change later)
12. Button Label "Register Now"
13. Click "Style" and change the button color to the NAD denim HEX#003b5c
14. Click "Auto Messages" and change the time is up timer to 90 minutes
15. On the form, edit the registration fields to have everything the event organizer requested. At the bottom, add a paragraph rich text.
    a. Registration fees will appear on your credit card statement as 'Advent*Source*.' (for paid events)
    b. **Advent*Source* Events** | Online Registration, Event Management Software, Event Website, Event App | [Set Up Your Event Registration](#) (for all events)
    c. Spanish - Las tarifas de inscripción aparecerán en el estado de cuenta de su tarjeta de crédito como 'Advent*Source*.' (for paid events)
16. All NAD Events require the below fields (regardless if the event organizer did not add them – you can let them know of this in the email after setup. CC Frenita and Anika)
    a. Home Conference (Drop-down single select – include North American Division and an Other spot)
        i. Create a single text field for Other and make it conditional on the other being selected for the home conference
    b. Emergency Contact First & Last Name
    c. Emergency Contact Phone Number
    d. Meal Selection (Drop-down single select – Vegetarian, Vegan and Gluten-Free) -only if the event is offering meals. If they say that only vegetarian is offered, bring it up in the email after setup with Frenita and Anika cc'd.
17. For the check out screen, make sure that only "Pay by credit card" is selected. No one will be allowed to pay by invoice.
18. Edit the confirmation message to read, "Thank you for registering! Please check your email inbox or spam folder for your confirmation email."
    a. Add lodging information to the confirmation message if the event coordinator wants that information there
19. Setup Settings
    a. Remove check for "Allow attendees to transfer their tickets to other delegates"
    b. Keep the check for "Allow attendees to edit their personal profile after registration"
20. Payment Settings
    a. Select "AdventSource Payment Processor"
    b. Setup invoice – just the company (AdventSource) and Address (AdventSource) – no one will use this but it's required to continue.
    c. Customize Billing Information *all required below

      i.   Address*

      ii.   City*

      iii. State*

      iv. Zip*

      v.   Country*

21. Event Access
    a. Login with email or ticket number
    b. Enable automatic login/register pop-up window
22. Edit the website with the correct information and formatting
23. Website Settings
    a. I'm using the Bizzabo website with my own domain – register.adventsourceevents.org *(for NAD, whatever domain that is created specifically for your events)*
    b. This domain is for multiple event website – the event name
    c. Upload the Advent*Source* favicon
    d. For internal events or for internal testing before the event, deselect the "Allow search engines to include your site in search results"
        i. For public events that will be posted on Advent*Source*, keep it checked
24. Edit the website
    a. Design
        i. Action Color & Main Color – NAD denim HEX#003b5c
        ii. Font – "Noto Sans"
    b. Home Page
        i. Header – add stock photo *(unsplash.com of maybe something to match their event)* as background unless the event organizer provided one for package 2.
            1. Event Name
            2. Date
            3. City, State or Virtual Event
            4. Remove – Doors open at:
            5. Remove social media buttons
            6. Add register page link (you'll need to add this page and change the end of the link from "custom-tab" to "register" – it takes Bizzabo a hot second to change the link over after you create a page.)
            7. Adjust button color to either match the event graphic provided or to NAD denim HEX#003b5c
        ii. Event Description – add a custom element (the event description pulls from the basics tab on the backend which links to the mobile app. Sometimes, it's ideal to keep these separate if the mobile app needs different information on the home page.)
            1. Hide 2 columns
            2. Add Title "About the Event"
            3. On the column still available, hide the image and button
            4. Edit Text
                a. Add the event description
                b. Who Should Attend -in bold

       c.   Change all text to "Noto Sans" -NAD official font & black text for easy readability – the event organizer can change any aspect once they have access. Most don't though.

5.   Style
   - a.   Change title color to NAD denim HEX #003b5c
   - b.   Change font to "Noto Sans"
   - c.   Bold

iii.   Add countdown

iv.   Location

1.   Style
   - a.   Title – color NAD denim HEX#003b5c
   - b.   Title – bold
   - c.   Event venue – event venue color NAD denim
   - d.   Event venue – font size 18
   - e.   Event venue – text color black
   - f.   Font – noto sans

c.   Register Tab

i.   Add custom element – registration information

ii.   Hide 2 columns

iii.   Edit text

Title – Registration – NAD denim bold

Registration Fees -bold & font size 16

The registration fees are per registrant. Please plan to register early with Advent*Source* since no registrations will be taken on-site.

$x _registration ticket name Available now through _date registration closes

The price of registration includes _registration inclusions.

To Guarantee Your Place -bold & font size 16

Please register as soon as possible. You may register online or call Advent*Source* (800) 732-7587. All major credit cards accepted. Advent*Source* will process registrations for this event through _registration closed for good date.

Refund Policy -bold & font size 16

You may request a refund minus a $x processing fee, per registrant, through _date the event organizer put on the set up registration form. You may substitute someone to attend in your place after this date, if you will not be able to participate.

Tickets are transferrable. *if the event organizer put that it's transferrable on the set up registration form

     iv.   Edit text for free events and add a button for the registration flow

     v.   Paid events need the registration widget added

1. If there are multiple registration flows, a custom element should be added with the buttons for those ticket types linked to the registration flows.

     vi.   Add custom element "Paying by Card?"

1. Complete payment by selecting the ticket below.

     vii.   Add form – "Paying by Check?"

Complete the following form with your registration details.

Please mail the completed registration page with your check or money order, paying the exact registration fee, made payable to AdventSource to the address listed below.

No partial event registration payments will be accepted.

Advent*Source* Event Registration

5120 Prescott Avenue

Lincoln, NE 68506-5433

In order to receive a discounted rate, your payment envelope must be postmarked with the date that rate ends.

Special Note -bold & font size 16

Failure to provide the completed registration page with your contact telephone number will delay the processing of your event registration. If Advent*Source* is not able to get complete information within three business days of receipt, your registration check or money order will be returned.

Mail-in Registrations -bold & font size 16

All registrations sent by mail must be received by noon _date registration closes (if the registration is open on-site, give a date about 3-5 business days before the event starts).

1. Add the registration fields
   a. Include a multi-select drop down for "Registrations you are purchasing"
   b. Check Number
2. Change button to "Submit"
3. Change the confirmation message to "Registration form submitted. Once Advent*Source* receives your check in the mail, you will receive an email confirmation receipt."

d. Additional Info Tab – Package 1

On-site Event Check-in -bold font size 16

You may check-in and pick up your event material on _date at _registration check in time frame. Please plan to register early with Advent*Source* since no registrations will be taken on-site.

Children -bold font size 16

As a courtesy to other attendees, and to maximize your benefit during this event, we ask that you make other plans for the care of your children. *or whatever wording the event organizer put on the set up registration form.

Additional Questions -bold font size 16

You may contact _event contact name at _work phone or _email address hyperlinked for additional information

Host Organization -bold font size 16

The _organization name is the host organization for this event.

e. Additional Info – Package 2

Meals -bold font size 16

Each attendee will receive meals that are vegetarian, vegan or gluten-free. *Or whatever options available. Include the meals provided, if available.

On-site Event Check-in -bold font size 16

You may check-in and pick up your event material on _date at _registration check in time frame.

Directions -bold font size 16

Click here for a Map (hyperlinked to google map of the venue location) | Weather (hyperlinked to weather in that city)

Nearest Airports -bold font size 16

Airport name and code hyperlinked to airport link, airport address

Shared Rides -bold font size 16 (Or Ground Transportation)

You can schedule your transportation with Uber (hyperlinked to Uber website) or Lyft (hyperlinked to Lyft website). *If the event has details for ground transportation, include it here.

Dress -bold font size 16

The dress code is business casual/casual (or whatever the event organizer put on the form).

Children -bold font size 16

As a courtesy to other attendees, and to maximize your benefit during this event, we ask that you make other plans for the care of your children. (or whatever the event organizer put on the form)

Additional Questions -bold font size 16

You may contact _event contact at _work number or _email address hyperlinked for additional information.

Host Organization -bold font size 16

The _organization name is the host organization for this event.

    f. Lodging Page (for package 2)
       i. Custom element
          1. Lodging title
          2. Hotel name, address
          3. Details about the hotel (pricing, cut off date, contact information, promo code for booking over the phone, etc.)
          4. Click the button below to book your lodging
          5. Button enabled to the booking link provided.

25. Change the email sender for the automated emails to: no-reply@adventsource.org
26. Change email sender name
    a. AdventSource Events -for all events through (Set Up Your Event Registration Form)
    b. NAD Events – for all NAD events (from NAD Set Up Your Event Registration Form)
27. Order Confirmation Email
    a. Uncheck attach invoice
    b. Check attach ticket (if the event is ticketed, not virtual)
    c. Remove "Event tickets will be sent to the registrants according to the order, and you may manage the registration details at any stage."

       d.   Change this to live if the event is doing group registrations and it is likely the event will have a lot of group purchases.

       e.   Otherwise, this email is sent if we send the order confirmation email.

28. Registration Cancellation
    a.   Remove Download App

29. Registration Transfer Confirmation
    a.   Remove Download App

30. Registration Confirmation
    a.   Remove "We encourage you to get familiar with the event agenda, the speakers and the sponsors to make the best of your participation."
    b.   If the lodging information is available, add the link as a button and "Book your lodging by clicking the button below."
    c.   Change button to "Manage Registrations Page"
    d.   Remove Download App
    e.   For Paid events - Add Element – Body Message
        i.   Registration fees will appear on your credit card statement as 'Advent*Source*.'

31. Refund Confirmation
    a.   Remove Download App

32. Pause the Invoice Order Confirmation campaign
33. Add the event coordinator to be a contributor for the event website
34. Publish the website (Once the event organizer gives the approval to do so)
35. Post the website on Advent*Source* calendar and website

Free Tickets

A ticket may appear to be free within Bizzabo but for it to be truly free and marked accordingly, the "Ledger Code" must read "FREE". The treasurer will see the "FREE" in the report exported and mark the ticket as free in the final payment summary. The event coordinator will not be charged a per registrant fee for the tickets that are marked "FREE" in the ledger code.

If the event coordinator is moving funds around internally to mark the ticket as "free" then they will still be charged the per registrant fee.

Name Badges

Ideal Time Frame for Ordering Name Badges:

- When registration is set up, ask the event coordinator if they will be ordering name badges from Advent*Source*.
- After registration is set up, begin working with the event coordinator on the artwork.
- The final roster and final artwork must be sent 5 business days prior to shipping.
- 1 month before the name badges should be shipped out the name badge artwork should be finalized and begin name badge merge.
- 5 business days before shipped for name badge merge (name badges ready for printing).
- 3 business days before shipped for production to print & ship out the name badges.
- 2 weeks before the event starts, the name badges should be shipped out.

- At least 1 week, preferably 2 weeks before the event, the name badges should arrive at their destination.

Product Numbers for Name Badges & Lanyard
- 100358 – Name Badge 3x4 1-Side B&W
- 100359 – Name Badge 3x4 1-Side COLOR
- 100363 – Name Badge 3 ½ x 5 ½ 1-Side CLR Lami
- 100364 – Name Badge 3 ½ x 5 ½ 2-Side CLR Laminate
- 100361 – LANYARD – BLACK 5/8" w/bulldog clip

Process for Name Badges
1. Event Registration Coordinator asks the Event Coordinator if name badges will be ordered when they set the event up
2. Event Registration Coordinator quotes the cost of name badges
3. Event Registration Coordinator requests name badge artwork from Event Coordinator
   a. If the artwork is being created by Advent*Source*, we need at least 2 weeks to create a mockup of the name badge.
4. Event Registration Coordinator places the order (for payments by card or billed to the final payment)
   a. Include in the shipping comments & check the box to email the shipping coordinator the following
      i. When the package should arrive by
5. Event Registration Coordinator sends the artwork to the Creative Services Team
   a. If the artwork is created by Advent*Source*, the artwork mockup is sent to the Event Registration Coordinator who sends it to the Event Coordinator for approval.
6. Creative Services Team sends the name badge mockup to Event Registration Coordinator
7. Event Registration Coordinator sends the name badge mockup to the Event Coordinator
8. Event Coordinator sends the approval to print the name badges
9. Event Registration Coordinator exports the roster and sends it to the Event Coordinator for approval
10. Event Coordinator approves the roster
11. Event Registration Coordinator renames the roster "Final Roster - __Event Name__"
12. Event Registration Coordinator sends the final roster to the Creative Services Team
13. Event Registration Coordinator sends the approval to print with the artwork to the Creative Services Team
14. Event Registration Coordinator places the order for the name badges using a credit card, check, or EC 3000 account for taking the name badge fees from the event funds payout
   a. The Event Registration Coordinator must communicate with the Event Coordinator on method of payment before placing the order
   b. Payment options:
      i. Invoice charged to the organization (must have account already set up and the event coordinator must have authorization to invoice the organization)
      ii. Credit Card – must call the treasurer to place the order with the credit card
      iii. Check – mailed to AdventSource Accounting

15. Event Registration Coordinator sends email to Production about the order placed (amount of name badges, type, when merge was started)
    a. Production checks if product is in stock and will restock before the merge is completed
16. Creative Services Team merges the registration roster with the name badges
17. Creative Services Team sends the name badge merge doc to the Event Registration Coordinator for a quality check
18. Event Registration Coordinator review the doc and sends the doc to Event Coordinator for review
19. Event Coordinator sends edits to the Event Registration Coordinator who sends that to the Creative Services Team
20. Once the merge is approved, the Event Registration Coordinator sends the merge final doc to Production for printing
21. Production prints the name badges
22. Event Registration Coordinator alphabetizes the name badges
23. Event Registration Coordinator shrink wraps the name badges in a bundle or hands it off to Production to do that
24. Event Registration Coordinator or Production prints the order number sticker for Shipping and places the order in the appropriate shipping queue shelves
25. Shipping Team ships the name badges out
26. Shipping Team provides the tracking number to the Event Registration Coordinator or emails the Event Coordinator directly (if the order was made on the backend of Advent*Source*, the event registration coordinator can pull the tracking number from the order number)

Custom Name Badges and Lanyards - Outsourced

Use PCnametag.com to print customized name badges and lanyards that are outside of our scope. Whatever the vendor quotes us, multiply the per name badge amount and shipping amount by 1.15 and quote the client.

The event coordinator must send the final roster and final artwork 7 business days prior to shipping.

Shipping for Name Badges (In House)

West Coast

- FedEx 2nd Day – Takes 3-4 business days (not including Saturday) -usually the cheapest option but not the best option
- UPS Second Day Air – Takes 3-4 business days (including Saturday, but quote the client not including Saturday to give wiggle room) -the best option for 2nd day air between FedEx and UPS

East Coast

- FedEx 2nd Day – Takes 3 business days (not including Saturday) -usually the cheapest option but not the best option
- UPS Second Day Air – Takes 3 business days (including Saturday, but quote the client not including Saturday to give wiggle room) -the best option for 2nd day air between FedEx and UPS

Midwest

- FedEx 2nd Day – Takes 2-3 business days (not including Saturday) -usually the cheapest option but not the best option

- UPS Second Day Air – Takes 2-3 business days (including Saturday, but quote the client not including Saturday to give wiggle room) -the best option for 2nd day air between FedEx and UPS

ACH Authorization Form

Every conference or organization needs to send a completed & signed ACH Authorization Form to accounts@adventsource.org.

If the conference or organization already has one on file, we will use that one versus asking for a new one to be signed.

The Event Registration Coordinator should rename the "Contract" in the "F Drive" to state "ACH on file_" before the rest of the name of the file.

Final Payment Summary (Post-Event & Estimates)

Final Payment Summary (Standard & Partial Payout)

Event Coordinator's and their treasurer will receive a final payment summary when the funds are directly deposited. The standard final payment is 5-7 business days after registration closes. If the event coordinator needs the funds sooner, Advent*Source* can work with them. The CFO has approved a partial payout of 75% of the total registration amount 1 month before the event or 5-7 business days after the event coordinator decides they want a partial payout. If the event coordinator decides what date they want a partial payout before they need it, we can plan accordingly. The CFO will send the final payment summary out to them.

The final payment summary includes the number of registrations, the number of cancellations, event setup fee, total credit card payments, total credit card bank processing fees, total check payments, total refunds, partial payment check, and the final payment deposited. Email accounts@adventsource.org.

Final Payment Summary Process (Advent*Source* Events)

When the Event Coordinator completes the "Set Up Your Event" form or the "Event Registration" form, they will be asked "The standard event final payment is 5-7 business days after the registration closes. If registration will be open through the event, we will issue a partial payment 1 month before the event starts. After the event is over, we pay out 100% of the final payment 5-7 business days post-event. Does this work for you?"

If the Event Coordinator is fine with the standard final payment, the Event Registration Coordinator will send an email to the CFO after the event ends. The email will contain the following information.

- Event name
- Date the registration closed *(all payments and refunds are finalized)*
- Who to send the final payment summary to *(event coordinator and/or admin assistant – the organization treasurer is already listed on the ACH form)*
- If it's a final payment or partial payment
- # of registrations (including refunds/cancellations minus the free tickets)
- # of refunds/cancellations (minus the free tickets)
- Free ticket categories & # of free registrations
- $200 package 2 charge or add-on services (name badges & lanyards are not included)
- Details of refunds so far'

- Details of swapped tickets
- Pricing for the per registrant fees (i.e. TX Conf. $2.00/registrant)

Partial Payment Process (Advent*Source* Events)

If the Event Coordinator prefers a partial payout, the Event Registration Coordinator will send an email to the CFO 5 business days before the payment is needed. The email will contain the following information.

- Event name
- Date the registration closed *(all payments and refunds are finalized)*
- Who to send the final payment summary to *(event coordinator and/or admin assistant – the organization treasurer is already listed on the ACH form)*
- If it's a final payment or partial payment *(if it's a partial payment, how much or what percentage?)*
- # of registrations (including refunds/cancellations minus the free tickets)
- # of refunds/cancellations (minus the free tickets)
- Free ticket categories & # of free registrations
- Details of refunds so far
- Details of swapped tickets

Final Payment Summary Process (NAD Events)

When the Event Coordinator completes the "NAD Set Up Your Event Registration" form or the "NAD Event Registration" form, they will be asked "The standard event final payment is 5-7 business days after the registration closes. If registration will be open through the event, we will issue a partial payment 1 month before the event starts. After the event is over, we pay out 100% of the final payment 5-7 business days post-event. Does this work for you?"

If the Event Coordinator is fine with the standard final payment, the Event Registration Coordinator will send an email to the CFO after the event ends. The email will contain the following information.

- Event name
- Date the registration closed *(all payments and refunds are finalized)*
- Who to send the final payment summary to *(event coordinator and/or admin assistant – the organization treasurer is already listed on the ACH form)*
    - Include Frenita Buddy Fullwood (NAD EMS Director) events@nadadventist.org on all NAD Events payout emails (For HRS events or NAD events split between multiple departments, send the final payment summary to only Frenita.)
- NAD Department Account #
- If it's a final payment or partial payment
- # of registrations (including refunds/cancellations minus the free tickets)
- # of refunds/cancellations (minus the free tickets)
- Free ticket categories & # of free registrations
- $200 package 2 charge or add-on services (name badges & lanyards are not included)
- Details of refunds so far
- Details of swapped tickets

Partial Payment Process (NAD Events)

If the Event Coordinator prefers a partial payout, the Event Registration Coordinator will send an email to the CFO 5 business days before the payment is needed. The email will contain the following information.

- Event name
- Date the registration closed *(all payments and refunds are finalized)*
- Who to send the final payment summary to *(event coordinator and/or admin assistant – the organization treasurer is already listed on the ACH form)*
  - Include Frenita Buddy Fullwood (NAD EMS Director) events@nadadventist.org on all NAD Events payout emails (For HRS events or NAD events split between multiple departments, send the final payment summary to only Frenita.)
- NAD Department Account #
- If it's a final payment or partial payment *(if it's a partial payment, how much or what percentage?)*
- # of registrations (including refunds/cancellations minus the free tickets)
- # of refunds/cancellations (minus the free tickets)
- Free ticket categories & # of free registrations
- Details of refunds so far
- Details of swapped tickets

Estimated Final Payment Summary

Event Coordinators may ask for an estimate before the event. The Event Registration Coordinator will send the estimated final payment summary to the Event Coordinator. Please use the directions below when completing the final event statement excel sheet.

1. Pull the event revenue for credit card payments from Bizzabo
2. Use the formula for 3.5% of that in credit card fees (=credit card payments*.035)
3. The amount of registrations at the per registrant fee *(that AdventSource is charging. ie. $4.00/registrant)*
4. Input the event setup fee if there was one
5. Put on the statement somewhere that it's "As of this date ___"

Freebies

There are certain products that we offer as freebies for events. Women's Ministries events are primarily the only ones that receive freebies. Other events may need bags to hold all the goodies that they are gifting to their registrants. We may offer, at Brad's discretion, plastic bags that say "Advent*Source*" to publicize our business. The bags can hold up to 25 pounds.

Editing an Event After it is Published

When you edit an event after it is published, there are a few things to keep in mind.

- Anything you edit on the pages of the website that are public is available for anyone viewing the website to see.
  - Bizzabo automatically saves your progress while editing. You don't always have to click the save button
  - Work around

- Edit the content on a hidden page then move it to the public page when the elements are ready.
- For events that are using the registration widget, any changes to the ticket types will not automatically change on the widget embedded on another website.
    - Work around
        - Generate a new code for the widget after you have made the edits, copy it & paste it into the website
- Changes to an event description within the website builder will change the entire event's description.
    - The event description is used within the mobile app and AdventSource.org on the list of events
    - Work around
        - If you want to make changes to the event description block but not to the entire event description, copy the event description into a custom element. Delete the event description element.

Printed Registrant List

When an event coordinator orders a printed registrant list, the following questions should be asked.

1. How many printed registrant lists would you like to order? Each printed copy is $25.
2. What fields would you like included on the list?
3. Would you like it alphabetized by first or last name?
4. Would you like a check box included on the list?
5. When do you want the list to arrive?
6. What date would you like us to pull the final roster?
7. How would you like to pay for the registrant list? Do you want us to bill the conference, take the fee out of the final payment summary (for paid events), credit card, or check?

The printed registrant list includes 1 printed list, a digital copy sent to the event coordinator, fields added according to the event coordinator, and alphabetized according to what the event coordinator ordered. Shipping is not included. If someone from AdventSource is attending the event, we can send the list with that individual to take out the shipping cost.

The printed registrant list is product# 100357.