



USER GUIDE

PowerZapEvent

CRM 2013



Service



Support



Education



Add-ons

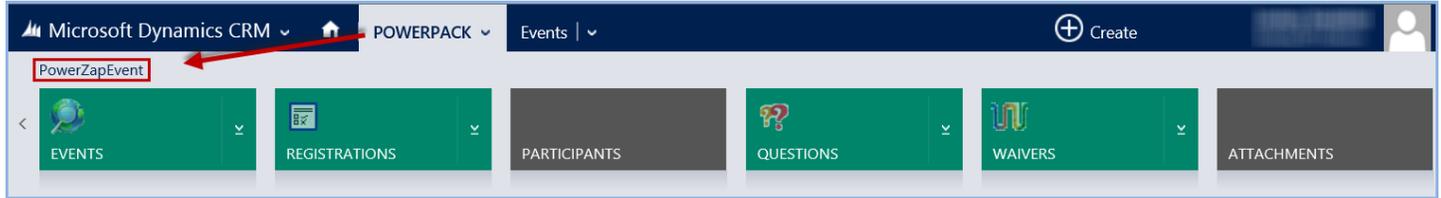
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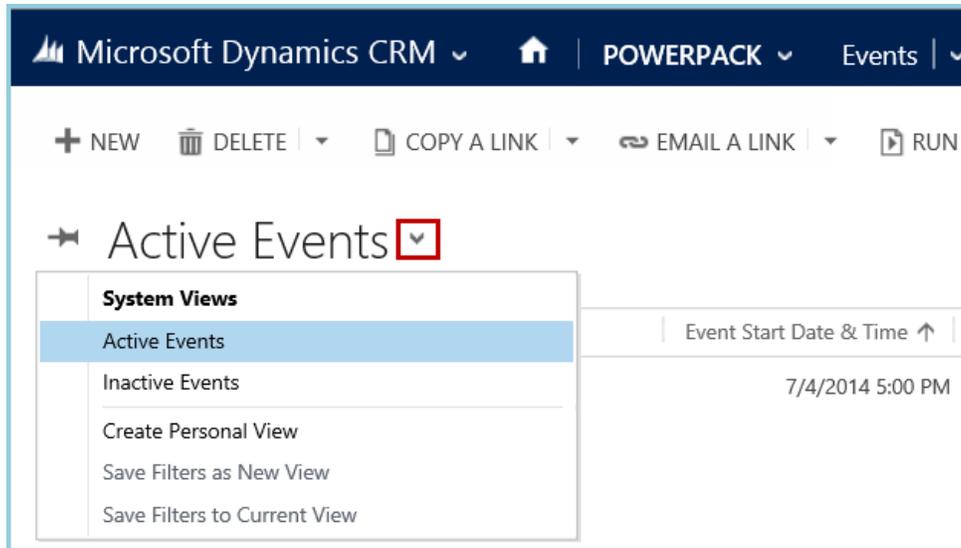
Overview

Once PowerZapEvent has been installed into Microsoft Dynamics CRM, there will be a new section located in the top navigation ribbon under the "PowerPack" tile, called "PowerZapEvent." Under the PowerZapEvent section, you will see Events, Registrations, Participants, Questions, Waivers, Attachments, Registration Participants, Series Setup and Series Setup Report.



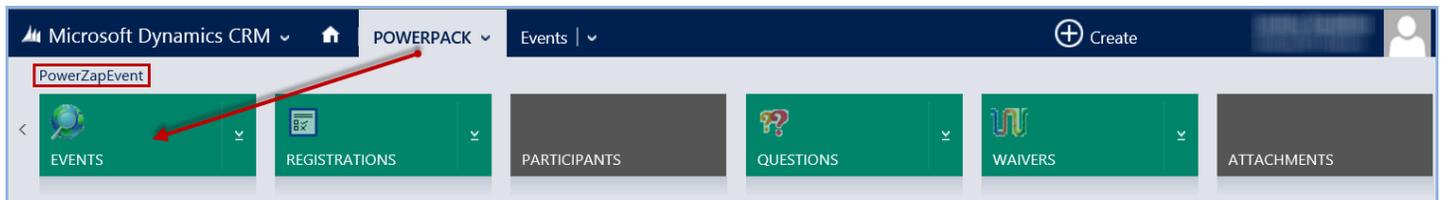
Events

This section will display all Events that have been created. By default, this view is set to show all of the Active Events. Inactive Events may be viewed by changing the view at the top of the page. If a listed Event has already happened, it is best practice to deactivate it, *not* delete it. By deactivating the Events, rather than deleting them, the data from the past Events will be available for use on future reports and analysis.



Creating an Event

In the top navigation ribbon, under the PowerZapEvent section, select Events.



In the upper left hand corner, select New:



The screenshot shows the PowerPack Events management interface. The 'Events' menu is highlighted in red. The 'NEW' button is also highlighted in red. The interface displays a table of active events with the following data:

Event Name	Event Start Date & Time	Category	Registration Closes
Convergence	7/4/2014 5:00 PM	Convention	7/3/2014 9:00 PM
Softball League	9/14/2014 10:00 AM	Baseball/Softball	9/13/2014 12:00 AM
PowerUp	9/23/2014 9:00 AM	Conference	9/22/2014 11:30 PM

Once a New Event has been opened, proceed to fill out the body of the Event. The following fields are required and the Event will not be created until all have been filled in: Event Name, Event Type, Event Date & Time, Registration Close Date & Time, Event Category, Info Box Title, and Processing Fee Description.

***Remember, when building the Event, frequently hit Save so as to not lose your hard work.*

Event Name

The name of the Event.

Active & Private Drop-down

There are three different options for the Event Type: Inactive, Active, and Active-Private. Choose the Event Type carefully; it is important, as it will determine who may see the Event. Inactive is selected by default. When an Event is *Inactive*, no one will be allowed to register for the Event.

When the Event Type is set to *Active-Private*, only registrants who have the direct URL to access the Event will be able to register for it. While setting up the Event, consider having the Event Type set to Active-Private. In a later step, this Event Type will allow the Event to be previewed exactly how it will be seen by registrants.

When the Event Type is set to *Active*, the Event will be open and available to the public. It is recommended to use this Event Type once the Event is finished being edited. The Event will now accept registrations. The public may now register for the Event and the Event will now also display on the ZapEvent's Event Page.

Event Start/End Date & Time

This is the date, or multiple dates, in which the Event occurs. The Start Time should be the official start of the Event and should coincide with the Start Date. The End Time should be the official end of the Event and should coincide with the End Date.

Registration Open/Close Date & Time

List the first and last day that are open for registration for the Event. To be able to preview the Event (in a later step), the Registration Start Date will need to be set prior to the current date. If the Event no longer needs to be able to be previewed, the dates may be changed at any time to reflect the desired Open Registration Date. All times and dates are in Central Standard Time. Time zone and exact time cannot be changed.

Show Event Dates Check Box

This will show or hide the event dates on the registration landing page, this box is checked by default.

The screenshot shows the 'New Event' form in PowerPack. The form is titled 'EVENT : INFORMATION' and 'New Event'. It includes a toolbar with 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'FORM EDITOR'. The form fields are as follows:

Field	Value
Event Name *	PowerUp
Event Type *	Active-Private
Event Start Date & Time *	9/24/2014 8:30 AM
Event End Date & Time *	9/25/2014 5:00 PM
Registration Open *	7/12/2014 12:00 AM
Registration Close *	9/23/2014 5:00 PM
Show Event Dates	<input checked="" type="checkbox"/>

Event Description

This is the main description of the Event. Try to keep it to a simple paragraph or two, the section has a max of 4000 characters and does accept HTML. If additional information is required, consider putting it in the Event Activity Description area.

The screenshot shows the 'Event Description' form. It features a rich text editor toolbar with the following options: Bold (B), Italic (I), Underline (U), ABC (font color), Format (dropdown), Font family (dropdown), and Font size (dropdown). Below the toolbar, the description text is: "PowerUp is a CRM educational conference hosted by PowerObjects that will take place on September 24-25 in Minneapolis, Minnesota."

Event Category

Select the Event Category for the Event: Swimming, Cycling, Running, Triathlon, Golf, Conference, Training, Membership, Seminar, Special Events, etc. The Event Type is used to sort events on the ZapEvent All Events page: <http://www.zapevent.com/registration.aspx>. If a new Event Category is created, the event will only show up in your CRM system it will not be added to ZapEvent's list of Event Categories on their website.

Note: Pre-designated categories will be populated into CRM about 24 hours after the installation of PowerZapEvent. If the pre-populated categories do not appear after 24 hours, please contact [PowerPack support](#).

Location Name

The place the Event is being held. For example; Waconia High School, Central Park, CoolCats Company Conference Building, etc.

Address, City, State, Zip Code

The exact street address of the location where the Event is being held.

Note: When an address is filled in, it activates the Google Map feature on the event page. This allows participants to follow a link to Google and get directions to the event's address.

Event Category *	Conference		
Event Location			
Location Name	PowerObjects		
Address	718 Washington Ave North		
City	Minneapolis		
State	MN	Postal Code	55401

Contact name, Contact Phone, Contact email, Contact Phone Ext.

This is the person that will handle all questions about the Event. The Contact e-Mail address will receive the registration notifications, any questions submitted from the "contact" button on the top of the registration landing page, and also will be listed at the bottom of the confirmation emails.

Show Contact Information

This will show/hide the Contact Info entered in the fields above this check box (Contact name, Contact Phone, Contact email, Contact Phone Ext) on the registration landing page.

Contact Info			
Contact Name	[Redacted]	Contact e-Mail	[Redacted]@powerobjects.com
Contact Phone	612-339-3355	Contact Phone Ext.	113
Show Contact Info	<input checked="" type="checkbox"/>		

Logo

If a logo has been loaded into the Attachment section of PowerZapEvent (under the PowerPack tab), select the search icon to the right of the box and select which of the loaded pictures will be displayed as the Event Logo.

Note: Image for logos are best if they are no more than 158 pixels wide. The logo will appear in the upper left hand corner of the registration landing page.

Video URL

To display a video on the Event Landing page, enter the video's URL here.

Event Website URL

List the Event's website. This will allow registrants to click on the Organization Website Icon on the Event Landing page and open it in a new page. This will also be displayed at the bottom of the confirmation email that recipients receive, directing them where to go for more information about the event.

Add a Note to Confirmation Email

Enter a personal message for the Event that will display on the bottom of the confirmation email that is received by the registrants. There is a sample confirmation email available later in the guide.

Optional Event Details	
Logo	powerobjects-purple_1497x517.png Select Picture
Video URL	--
Event Website URL	http://www.powerobjects.com
Add a Note to Confir	Thank you so much for signing up for the CRM Event! It will be a great time; looking forward to seeing you there!

Waiver

If a Waiver has been added to the Event in the Waiver section (under the PowerPack tab), it may be associated to the Event here. Click the search symbol to the right of the Waiver box and select the waiver for this Event from the pop up window. Registrants will be asked to agree to this waiver before they can register for your event.

Short Name

Instead of a long URL, for example: <http://www.zapevent.com/listactivities.aspx?eventid=154>, the Event link can have an easy-to-remember Short Name, for example: <http://powerup.zapevent.com>.

Note: The text for the short link must not already be in use for another event and must consist of numbers, letters, underscores, or dashes, and also may NOT contain spaces, periods, or special characters.

Waiver	PowerUp Waiver
Short Name	crmpowerup
Add Am I Registered	<input checked="" type="checkbox"/>

Add "Am I Registered?" to Event Page checkbox

By checking this box, a search box will appear on the registration landing page that allows participants to see if they have already registered for this Event. The participant enters at least the first character of the first or last name to confirm whether they are indeed registered for the Event. Participants are able to search for friends and family as well.

Registration Confirmation

First Name

and / or

Last Name

Am I Registered?

After someone enters the information and clicks "Am I Registered?", the match's first name, last name, city, state, and the Event Activities they are registered for will be shown:

PowerUp ZAP EVENT

Am I Registered?

First Name and / or CRM **Search**

Last Name	First Name	City	State	Activity
CRM	Joe	Minneapolis	MN	Day 1: Pre-Conference Training
CRM	Jill	Minneapolis	MN	Day 1: Pre-Conference Training
CRM	Joe	Minneapolis	MN	Day 2-3: Powerup! The CRM Event
CRM	Jill	Minneapolis	MN	Day 2-3: Powerup! The CRM Event

Collect Additional Personal Information?

By default, registrants will be asked for their first name, last name, street address/state/country/zip code, phone number, and email address.

Info Box Title:

This is the header that will be displayed during registration at the top of the page that requires personal contact information. This heading may be as generic as Participant Information or more specific. It is possible to create multiple groups with different headings for the contact information page, for example, if there are team registrations. This will be covered later in the User Guide in the Activity Question section.

Collect Company, Collect birthdate, Collect Gender:

If any of these boxes are checked, registrants will be required to input their company, birthdate, and/or gender during registration.

Note: If it is necessary to have automatic tiered pricing based on a participant's age, the Birthdate box must be checked.

USAT Waiver Flag

If the Event is a USA Triathlon sanctioned event, check this box to automatically populate the USAT waiver (see appendix for waiver text) for the Event; along with the applicable membership verification questions. This is in addition to any Event waiver that has been loaded. Participants will need to accept the event waiver **AND** accept the USAT waiver by checkbox and initials in order to proceed with their registration.

Collect additional personal information?

Info Box Title *	Participant Information		
Collect Company	<input checked="" type="checkbox"/>	Collect Birthdate	<input checked="" type="checkbox"/>
USAT Waiver Flag	<input type="checkbox"/>	Collect Gender	<input checked="" type="checkbox"/>
Notify Every Order	<input checked="" type="checkbox"/>		

Notify Every Order

This box must be checked if there is someone who would like to be notified of new orders. Email notifications will be sent to the email listed in the Contact Information section for this Event (example of email below). This box is checked by default.

ZAPEVENT

Order, Transfer, ...

You have a new order for PowerUp. This is a notification of the following registration.

Registration:	Order #: 391530
	Order Date: 08/04/2014
Day 1: Pre-Conference Training	\$400.00

Participants

Registered:	Jill CRM
Gender:	Female
Birthdate:	1/1/1987
Company:	PowerObjects
Address:	718 Washington Ave North Minneapolis, MN 55401
Phone Number:	6123393355
Email:	jill.crm@powerobjects.com
Total:	\$400.00



Fees and Payments

This is where the processing fee distribution is determined. The fee can be split by registrants and the company, or completely absorbed by the company or the registrants separately.

Processing Fee Description:

Fill in the text that will be displayed on the receipt for the Processing Fee.

Processing Fee Additional Amount/Percent:

When initially setting up an Event, these two items will be pre-populated with the standard ZapEvent processing fee. ZapEvent charges \$1.30 per registration plus 4.9% of the total order, if you are charging participants to register for your event. If you are not charging for your event, ZapEvent will not charge you a fee. The first box is a set dollar amount, the second is a percentage (i.e.: 1% would be input as 0.01 in this box). There are three options for setting up the processing fees for an Event:

Leave them set as defaulted

Doing this will have the registrants pay the processing fees during their registration. Your organization will *NOT* be paying for any of the fee for the registrants.

Set them both to "0" (zero)

Doing this will *NOT* charge the registrants the processing fees. They will pay the exact amount that has been set for the registration prices and the processing fees will be paid by your organization. The processing fees will simply be deducted from the checks ZapEvent sends your organization.

Set them to a different amount

Choose to set the percentage or straight dollar amount to any other amount. With this option, the processing fee may be "split" by your organization and the registrants in any denomination.

Note: If setting amounts for processing fees, please note the Percentage is added to the total ORDER, the straight dollar amount is added per REGISTRATION.

Fees & Payment	
Processing Fee Des *	Processing Fee
Processing Fee Addit	\$1.30
Processing Fee Perce	0.0490
Accept Checks	<input checked="" type="checkbox"/>

Accept Checks checkbox

If this box is checked, registrants will be able to process their registration online but then mail a check to your organization. Upon completion of their registration, they can choose "Send in Check" from the

dropdown list in the Billing Information. The confirmation email will contain the "Send Check To" address:

Billing Information	
Payment Method:	Check
Write Check To:	PowerObjects
Send Check To:	PowerObjects 718 washington ave n minneapolis, mn 55401

The "Send Check To" address is the name/address PowerObjects has on file for your organization (which is the information that was inputted into the PowerZapEvent registration screen), *NOT* the Event Address. This checkbox will be unchecked by default.

Event Participants Grid

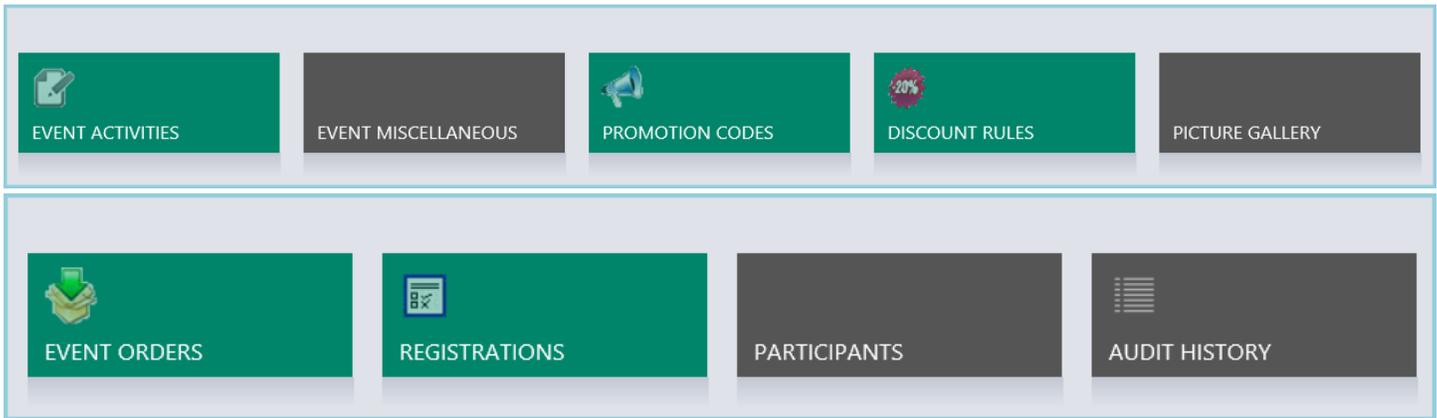
This grid will show every individual participant who has registered for any Event Activity associated to this Event. In other words, everyone attending this event will be listed here.

Event Participants			
First Name ↑	Last Name	Email	Business Phone
Dan	Halawani	lindsey.stadskiev@powerobjects....	6513393355
Joe	CRM	lindsey.stadskiev@powerobjects....	6123393355
Lindsey	Stadskiev	lindsey.stadskiev@powerobjects....	6123393355

Note: Registrations will be synced to CRM once an hour.

Ribbon Items on the Event Record

This section will go over all of the related Event items, found in the top navigation ribbon, under the specific Event record. These sections are here to help build out the Event.

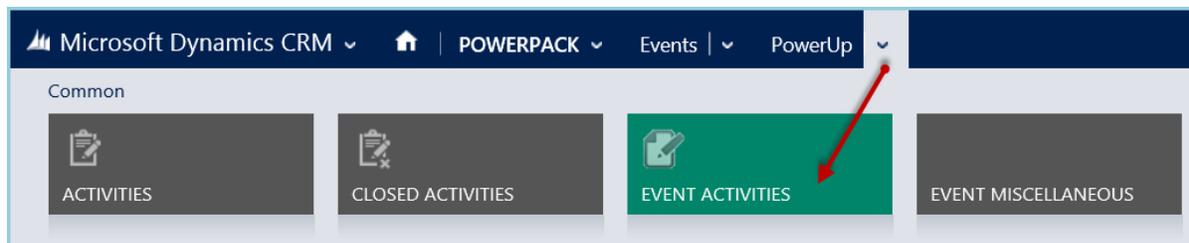


Event Activity

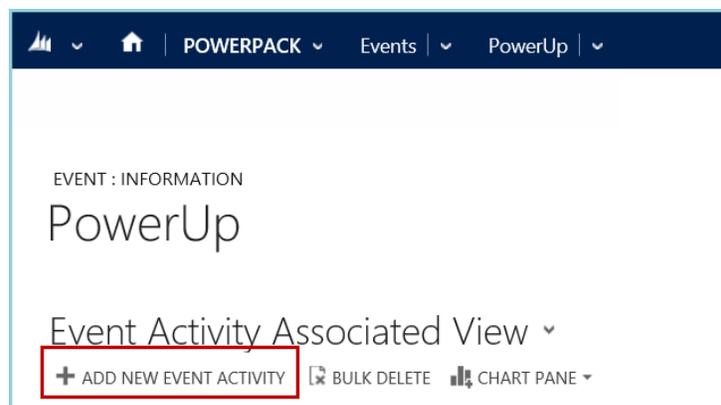
The Event Activity Record is directly related to the Event. The Event is built out through the Event Activities. Essentially, the Event is the umbrella that encompasses the Event Activities. If the Event has multiple activities, is over a few different days, has different activities at the same time, etc.; these details are determined here.

Creating a New Event Activity

Navigate to Event Activities by hovering over the dropdown arrow of the Event the Event Activity is to be added to. Then, click Add New Event Activity.



Select Add New Event Activity.



Name

Input the name of the Event Activity. This name will be displayed on the registration page when registrants are choosing which event to register for.

Description

This description will be displayed under the event activity name on the registration page. It may be helpful to add more information here for the specific event activity description as opposed to the main Event description that was created in the beginning.

Display Order

Activities are displayed in alphabetical order unless the order is manually specified. "1" will show up on the top of the list of activities on the registration landing page.

Add Processing Fee Checkbox

When this box is checked, the "Processing Fee" (specified on the main Event page) will be passed along to the registrant for this particular Event Activity. If the box is unchecked, the \$1.30 ZapEvent fee will be absorbed by your organization.

Event Activity	
Name *	Day 2-3: Powerup! The CRM Event
Description	The CRM Event
Display Order	2
	Add Processing Fee <input checked="" type="checkbox"/>

Activity Date & Time

Set the date/time for this specific Event Activity here.

Location

This field is for internal use only and will not be displayed when someone registers for this activity. If it is necessary to display a specific address for this Event Activity, it can go into the description field.

Register Button

Three options are available in this dropdown. Each Event Activity can be set to one of the following: Register, Buy, or Donate. Choose the one that is most appropriate for each activity.

Activity Date	9/24/2014 8:30 AM
Location	PowerObjects Headquarters
Register Button	<div style="border: 1px solid #ccc; padding: 2px;"> Register Buy Donate </div>

Type

Specify if this is an individual or team activity.

Individual: This is meant to register an individual or capture only the complete contact information for ONE person. When printing registration reports, all information captured for an individual registration will be on one row in the spreadsheet.

Team: This is meant to register a team of people and capture all contact information for each team member. When printing registration reports, each team member will display on their own row in the spreadsheet.

Maximum Registration

Each Event Activity can have its own maximum number of registrations. Inputting "0" (zero) means there is no maximum limit. When a number is entered here, once that number of registrations have been processed, the Event Activity will change to "Registration Closed" and will not allow any more registrations.

Type	Individual	
Maximum Registratic	300	

Note: You can change this number at any time to close or re-open the activity.

Minimum/Maximum Team Size

This applies only to "team" type activities. The number of participants required to complete a team registration is set here. The maximum can be no more than 20.

Type	Team	
Maximum Registratic	300	
Minimum Team Size	4	Maximum Team Size 6

Activity Participants Grid

This grid will show the Individual Participants who have registered for this specific Event Activity ONLY.

Once the main fields on the Event Activity record have been filled out, Activity Prices and Activity Questions may now be associated to the each Event Activity.

Activity Prices

Activity Prices can be setup as a single price or as tiered pricing based on date or by age. Each Activity requires a pricing record in order to be "live". Even if the Event Activity is free, an Activity Price must be associated with it; creating a \$0 (zero dollar) Activity Price will allow the Event Activity to be free of charge and will now accept registrations. Activity Price records can be defined ONLY by *Date* or by *Age*.

Pricing	
Price Good Through	--
Oldest Age for This P	--
Price Description *	Free
Price *	\$0.00

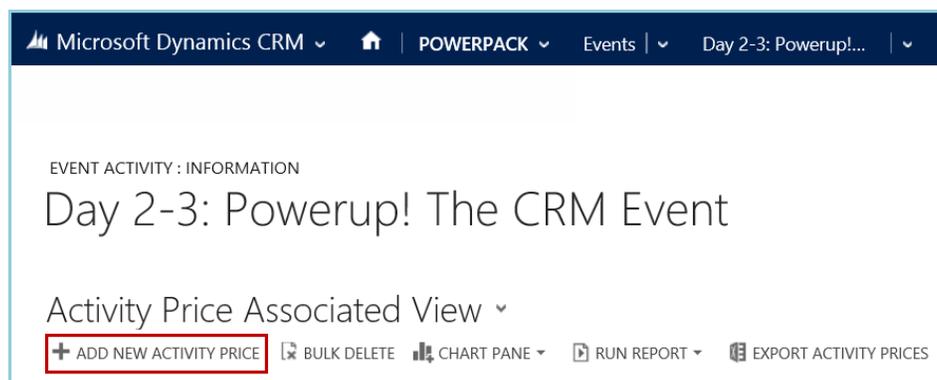
Every event activity must have at least one pricing record associated to it. Even if the event is free, there must be a \$0 activity price created for that event activity. Otherwise, no one will be able to register for that event activity.

Creating Activity Prices

Once in the Event Activities, select the Event Activity that needs an Activity price associated to it. Hover over the drop down arrow next to the Event Activity and select Activity Prices. Select Add New Activity Price and proceed to fill in the necessary content.



Select Add New Activity Price.



Price Good Through

This will be the last full date the price will be set at that rate.

Oldest Age at this Price

If all ages will be the same price, then set this to 999 or leave it blank. If the Event has tiered pricing based on age, input the oldest age that this price will apply to. Age will be calculated for the age the participant will be on the Event day and *NOT* the day they are registering.

In order to use tiered pricing based on Age, the "Collect Birthdate" check box must be selected in the main Event Record.

Price Description

The description of a particular pricing structure. This text will appear next to the price on the registration landing page.

Price

This price will be applicable to those people that meet the set criteria.

SAVE SAVE & CLOSE + NEW FORM EDITOR

ACTIVITY PRICE : INFORMATION

New Activity Price

Pricing

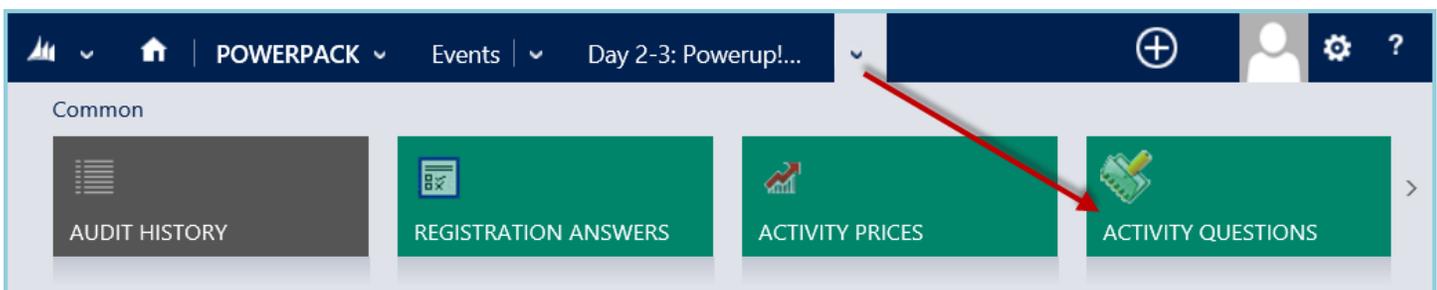
Price Good Through	9/22/2014
Oldest Age for This P	999
Price Description *	Good Through September 22
Price *	\$595.00

Activity Questions

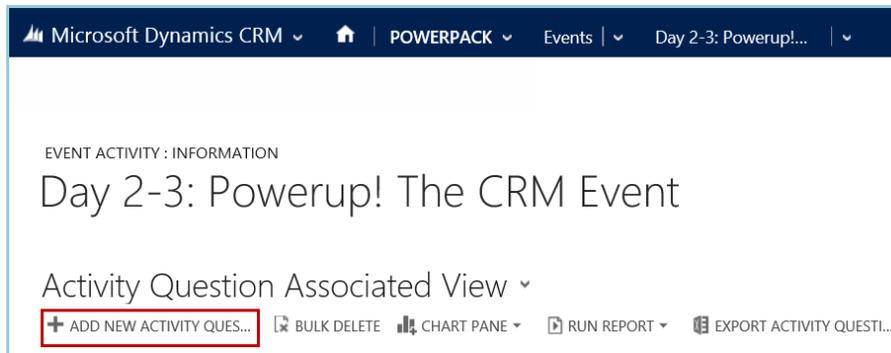
Activity Questions is where you will add any additional questions (required or optional) that you want to have your registrants answer during their registration for this particular activity.

Associating Activity Questions

On the Event Activity Record, click on Activity Questions in the left hand navigation and click on "Add New Activity Question" in the ribbon.



Select Add New Activity Question.



Group

The Group name will be the bolded header that shows at the top of a group of questions. On the registration page, questions that have the same Group name will be in a box together. Groups are listed on the registration page in alphabetical order. If you want the questions to be in the same box as the registration information (first name, last name, address, etc.), leave the Group field blank.

If you don't want your groups in alphabetical order, add A) B) C), etc. to the front of the group names to place them in the desired display order.

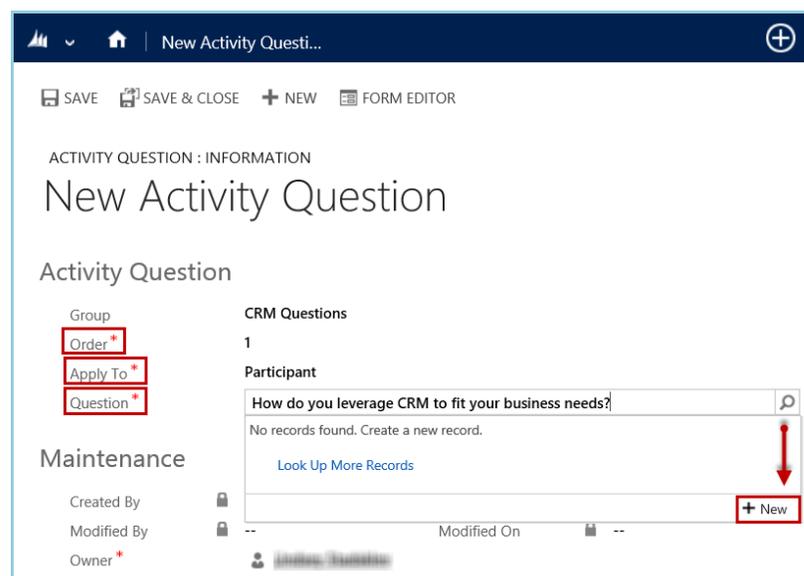
Order

Questions with the same Group Name can be ordered as well. Order "1" will be listed first in the Group.

Apply To

Registration: This is used to display the Question above the Participant Information OR, in the case of a Team Activity, it will ask the Question ONCE for the team.

Participant: This is used to display the Question below and inside the Participant Information box OR, in the case of a Team Activity, it will ask the Question of EACH team member.



Type in the Question. If not already in the bank of Questions, select New under the magnifying glass to create the desired Question right from this window.

SAVE SAVE & CLOSE + NEW FORM EDITOR

QUESTION : INFORMATION

New Question

Question

Type* Text Edit Required

Question* How do you leverage CRM to fit your business needs?

Footnote How does CRM help your business succeed?

Question Image --

Hit Save & Close.

SAVE SAVE & CLOSE + NEW FORM EDITOR

ACTIVITY QUESTION : INFORMATION

New Activity Question

Activity Question

Group CRM Questions

Order* 1

Apply To* Participant

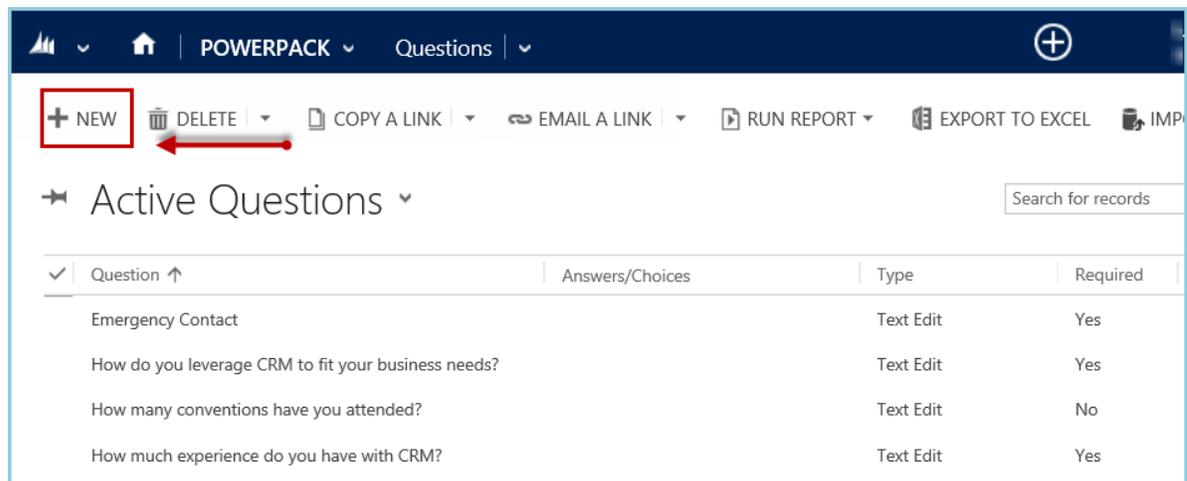
Question* How do you leverage CRM to fit your business needs?

Questions

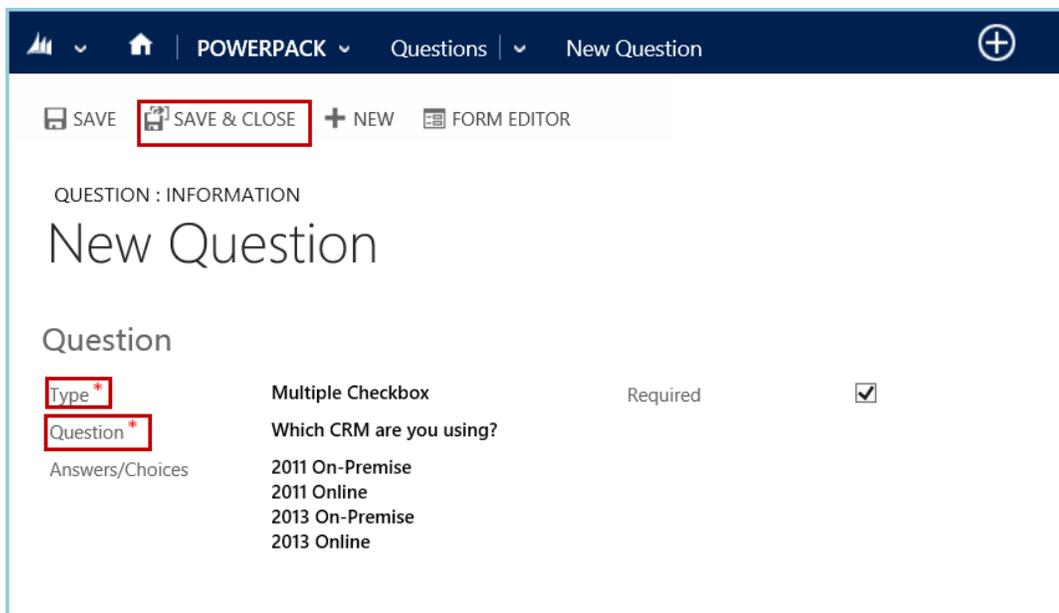
This is where you will choose the question you want to ask. Click on the search symbol on the right of the textbox to bring up the question view. If you have not added any question in the "Question" part of the main PowerZapEvent section, you will not see any questions listed here. Please go back to the PowerZapEvent question section, and add questions. Your other option is to click "New" in the window that popped up, and add a question that way.



Select New.



Select Save and Close.

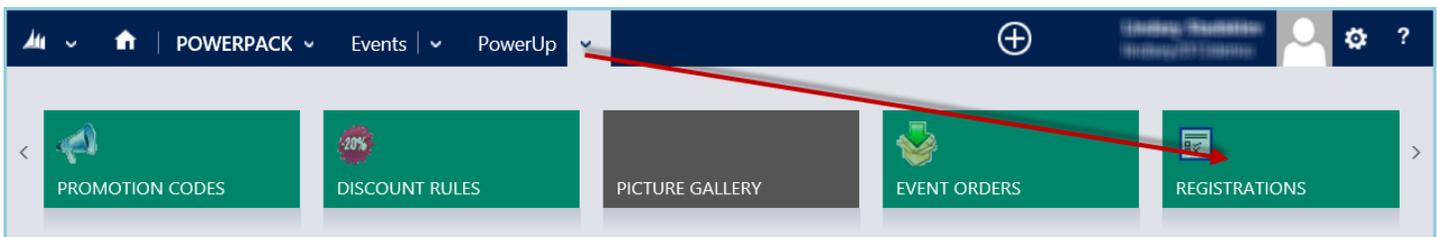


The saved Question will now be in the Question bank and able to be added to any Event Activity as needed. It will display the Question in the Bank with all other created questions:

Question	Answers/Choices	Type	Required	Footnote
Emergency Contact		Text Edit	Yes	Please give the name of your Emergen...
How do you leverage CRM to fit your business needs?		Text Edit	Yes	How does CRM help your business s...
How many conventions have you attended?		Text Edit	No	
How much experience do you have with CRM?		Text Edit	Yes	Tell us about your CRM knowledge!
question	one two three	Checkbox	Yes	
Which CRM are you using?	2011 On-Premise 2011 Online 2013...	Multiple Checkbox	Yes	

Registrations

Hover over the drop down next to the Event and select Registrations.



This view will list all of the registrations that are associated with this Event Activity. Remember, if you have a team type activity, there may be multiple participants under one registration. If you have an individual type activity, the number of registrations and the number of participants should be the same.

Created On	Order Entered By (Order)	Event	Activity	Event Start Date & Time (E...
7/15/2014 9:15 AM	Lindsey	PowerUp	Day 2-3: Powerup! The CRM Event	9/23/2014 9:00 AM
7/22/2014 5:13 PM	Dan	PowerUp	Day 2-3: Powerup! The CRM Event	9/23/2014 9:00 AM
7/30/2014 10:08 AM	Joe CRM	PowerUp	Day 1: Pre-Conference Training	9/23/2014 9:00 AM
7/30/2014 10:08 AM	Joe CRM	PowerUp	Day 2-3: Powerup! The CRM Event	9/23/2014 9:00 AM
8/1/2014 5:52 PM	Lindsey	PowerUp	Day 2-3: Powerup! The CRM Event	9/23/2014 9:00 AM
8/4/2014 11:13 AM	Jill CRM	PowerUp	Day 2-3: Powerup! The CRM Event	9/23/2014 9:00 AM
8/4/2014 12:21 PM	Jill CRM	PowerUp	Day 1: Pre-Conference Training	9/23/2014 9:00 AM

If a Registration is opened, a summary of the Registration details are available.

REGISTRATION : INFORMATION

Individual

Registration

Name * Individual
 Event PowerUp
 Activity * Day 2-3: Powerup! The CRM Event
 Registration Price \$595.00
 Registration Discount \$0.00
 Registration Discoun --

Participant

Full Name	Job Title	Company Name	Business Phone...	Mobile Phone	Street 1	City	State/Provi...	Email
Jill CRM			6123393355		718 Washington A...	Minneapolis	MN	jill.crm@powerobjects.com

Continue to scroll down and the record also contains the participant's Registration Answers and Waiver details:

REGISTRATION : INFORMATION

Individual

Registration Answers

Activity Question ↑	Created On
How do you leverage CRM to fit your business need...	8/4/2014 11:13 AM
How much experience do you have with CRM?	8/4/2014 11:13 AM

Waiver Details

Waiver	PowerUp Waiver	USAT Waiver	No	USAT Waiver Initials	--
--------	----------------	-------------	----	----------------------	----

Waiver Details

Waiver

If the registrant is asked to accept a waiver during registration, it will be displayed here.

USAT Waiver

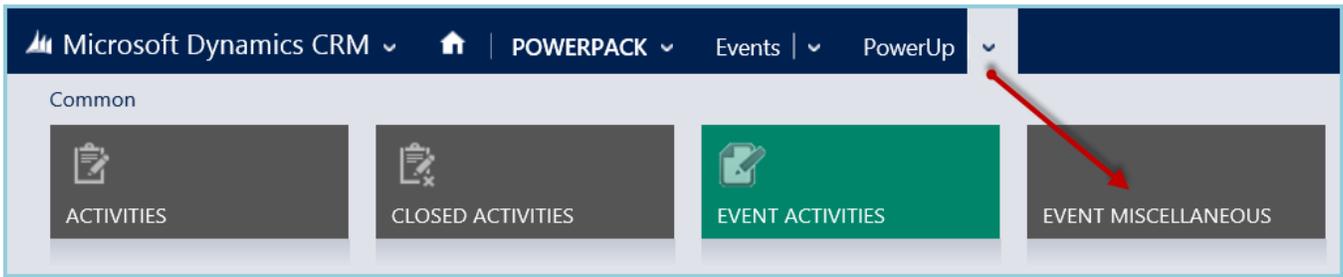
If the registrants were asked to accept the USAT Waiver, this will be set to Yes. If not, it will be set to No.

USAT Waiver Initials

If the registrants were asked to accept the USAT Waiver, they had to enter their initials upon registration, those initials will be displayed here.

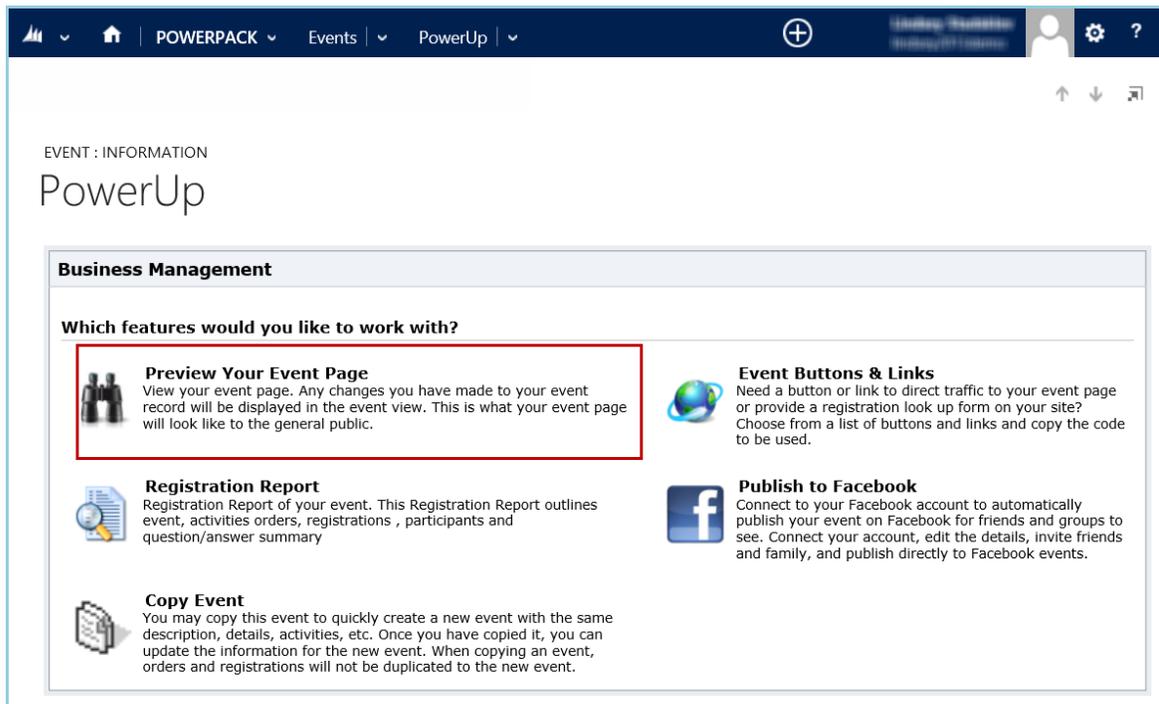
Event Miscellaneous

Hover over the drop down next to the desired Event. Click Event Miscellaneous.



Preview your Event Page

Click here at any time to get a sneak preview of what registrants will see as they walk through the registration as it is currently set up. If an order is created while previewing the Event, it will show up as a real order in CRM. See later in the User Guide for screen shots of this Process.



Registration Report

This report reflects the details of what is going on with the Event on the order/registration side. The report will display the basics of how many people have registered/donated, a demographic breakdown of registrants, and summaries of answers to any additional questions that were added to the registration form. The report can be viewed in the browser OR exported to Excel.

Business Management

Which features would you like to work with?

Preview Your Event Page
View your event page. Any changes you have made to your event record will be displayed in the event view. This is what your event page will look like to the general public.

Event Buttons & Links
Need a button or link to direct traffic to your event page or provide a registration look up form on your site? Choose from a list of buttons and links and copy the code to be used.

Registration Report
Registration Report of your event. This Registration Report outlines event, activities orders, registrations , participants and question/answer summary

Publish to Facebook
Connect to your Facebook account to automatically publish your event on Facebook for friends and groups to see. Connect your account, edit the details, invite friends and family, and publish directly to Facebook events.

Copy Event
You may copy this event to quickly create a new event with the same description, details, activities, etc. Once you have copied it, you can update the information for the new event. When copying an event, orders and registrations will not be duplicated to the new event.

Copy Event

If there is a Past Event that needs to be recreated, it is possible with PowerZapEvent to copy the Event and recreate a duplicate Event without having to interfere with the data connected to the past Event.

Note: Do NOT just modify last year's event for this year's dates/time, etc. and reopen the same event. Doing this will keep all of last year's registrations tied to the Event and therefore all of the reporting will contain both last year's and this year's orders. Also, all of the dates associated with the old Event will carry through to the new Event.

****Remember to update the dates in the Event Record, Activity Record, and the Activity Price Record.****

Business Management

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Connect to your Facebook account to automatically publish your event on Facebook for friends and groups to see. Connect your account, edit the details, invite friends and family, and publish directly to Facebook events.

Copy Event
You may copy this event to quickly create a new event with the same description, details, activities, etc. Once you have copied it, you can update the information for the new event. When copying an event, orders and registrations will not be duplicated to the new event.

When copying an Event, the default Event-type is will be set to inactive.

Event Buttons & Links

Business Management

Which features would you like to work with?

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Publish to Facebook
Connect to your Facebook account to automatically publish your event on Facebook for friends and groups to see. Connect your account, edit the details, invite friends and family, and publish directly to Facebook events.

In order to place a link to the Event on a designated website, the HTML code must be obtained for the button options that will then need to be added to the page. Click on Event Buttons & Links to open the following window:

Registrant Lookup Links:

Step 1: Click the type of link you would like on your page.

Am I Registered
 Am I Registered?

Step 2: Copy and paste the following link into your website to link directly to your event.

```

<b><a href='http://www.zapevent.com/AmIRegistered.aspx?eventid=5981'
target = '_blank' onclick='window.open
(this.href, 'window', 'width=760,height=582,resizable,scrollbars,toolbar
,menubar') ;return false;'><font>Am I Registered</font></a></b>

```

Event Page Links:

Step 1: Click the type of link you would like on your page.

Text Links

Register Now
 Donate Now
 Buy Now

Image Links

Step 2: Pick a landing page.

Event Page
 Straight to Registration Page

Step 3: Copy and paste the following link into your website to link directly to your event.

```

<b><a href='http://www.zapevent.com/ListActivities.aspx?eventid=5981'
target = '_blank'><font>Register Now</font></a></b>

```

Copy the link and paste it to your site!

Registration Look-up Links

The Registrant Lookup is an option to display our "Am I Registered" feature on your website. Here, visitors can look up registrations by entering at least one character of the person's first or last name. To obtain the HTML code for any of the four options listed below, place the radio button next to how you want the text to display. Then you can copy the HTML code listed in Step 2 and insert it into the source code for your website.

When a registrant clicks on the button/text to be directed to the Event Page of the Event (example below):

The screenshot shows a web page for an event titled "PowerUp". At the top left is the "POWER OBJECTS" logo. To the right, it says "Online Registration Powered By ZAP EVENT". Below the logo are two buttons: "Register Now" (orange) and "Contact Event" (white with blue border). There are also social sharing icons for "ShareThis", print, email, and other services. The main content area is divided into sections: "PowerUp" with a description, "Event Dates" (9/23/2014 9:00 AM to 9/25/2014 5:00 PM), "online registration opens" (7/6/2014 12:00 AM CST) and "online registration closes" (9/22/2014 11:30 PM CST), "Address" (718 Washington Ave North, Minneapolis, MN 55401) with a "view more at google maps >" link, and a Google Map showing the location. Below the map is a "Registration Confirmation" section. On the left, under "Activities", there are four expandable items: "Day 1: Pre-Conference Training", "Day 2-3: Powerup! The CRM Event", "Day 1: Microsoft Employee Registration", and "Day 2-3: Microsoft Employee Registration", each with a minus/plus icon.

Event Page Links

The Event Page Links is an option to display our ZapEvent text or button on your own website; they will lead registrants directly to the Event Landing Page on our site. To obtain the HTML code for any of the listed options:

Step 1: Place the radio button next to the preferred text to display.

Step 2: Choose the button/link to go to the Event Landing Page or Straight to Registration Page.

Note: *Straight to Registration simply bypasses the Event Landing Page and starts at the Login/Guest Sign-In and Waiver Acceptance.*

Step 3: Copy the HTML code listed in Step 3 and insert it into the source code for your website

Publish to Facebook

Business Management

Which features would you like to work with?

Preview Your Event Page
View your event page. Any changes you have made to your event record will be displayed in the event view. This is what your event page will look like to the general public.

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Registration Report of your event. This Registration Report outlines event, activities orders, registrations, participants and question/answer summary

Publish to Facebook
Connect to your Facebook account to automatically publish your event on Facebook for friends and groups to see. Connect your account, edit the details, invite friends and family, and publish directly to Facebook events.

Copy Event
You may copy this event to quickly create a new event with the same description, details, activities, etc. Once you have copied it, you can update the information for the new event. When copying an event, orders and registrations will not be duplicated to the new event.

This button will automatically publish a link to the Event on the Facebook site. Once ZapEvent and Facebook have been connected, this will be available to use.

ZapEvent
fb Publish Event To Facebook

Publish Your Event To Facebook

Step 1: Connect to your Facebook account

Connect to your Facebook account to automatically publish your event on Facebook for friends and groups to see.

[fb Login with Facebook](#)

Promotion Codes

Promo Codes are an easy way to give out discounts to specific people and/or groups. To add a Promotion Code to the Event, click on Promotion Codes under the dropdown arrow next to the desired Event.

The screenshot shows the Microsoft Dynamics CRM navigation bar. The breadcrumb trail is: Microsoft Dynamics CRM > POWERPACK > Events > PowerUp. Below the navigation bar, there is a 'Common' section with several buttons: ACTIVITIES, CLOSED ACTIVITIES, EVENT ACTIVITIES, EVENT MISCELLANEOUS, PROMOTION CODES, and DISCOUNT RULES. A red arrow points to the 'PROMOTION CODES' button.

Then click on "Add New Promotion Code".

EVENT : INFORMATION

PowerUp

Promotion Code Associated View ▾

[+ ADD NEW PROMOTION C...](#)
[BULK DELETE](#)
[CHART PANE ▾](#)
[RUN REPORT ▾](#)
[EXPORT PROMOTION CO...](#)

Note: Promo codes are discounted per order. Only ONE promo code can be applied PER ORDER.

New Promotion Code

SAVE SAVE & CLOSE + NEW FORM EDITOR

PROMOTION CODE : INFORMATION

New Promotion Code

Event [PowerUp](#)

Promotion Code

Promotion Code * CRM

Promotion Type Dollar

Dollar Discount \$50.00

Expire Date 7/23/2014 8:00 AM

Apply to Registration Apply to Questions

Maximum # of Uses 200

Promotion Code

Specify the code name that is to be used. This IS case specific; for the code to work, participants must enter it *exactly* as it's displayed here.

Promotion Type

Promo Codes can be set to discount by percentage or set dollar amount.

Dollar Discount/Percent Discount

Once the Promotion Type has been selected, this field will appear. Choose the percentage or dollar amount desired for this Promotional Code.

Promotion Code

Promotion Code * --

Promotion Type

Dollar Discount

or

Promotion Code

Promotion Code * --

Promotion Type

Percent Discount

Expiration Date/Time

Set the date and time (CST) that the code will expire. A date may be selected by clicking the small calendar icon to the right of the blank box. If there is no expiration date, this may be left blank or set the date to a date after the Event takes place.

Apply to Registration Checkbox

Check this box if the percentage/dollar amount is to be discounted from the Registration price.

Apply to Questions Checkbox

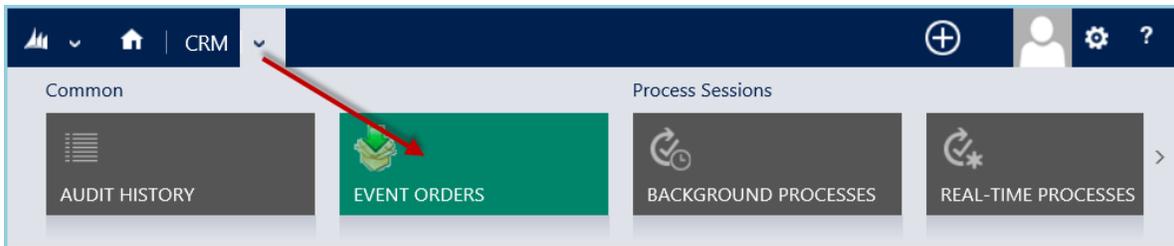
Check this box if the percentage/dollar amount is to be discounted from any additional dollars that were added on because of Question Answers.

Maximum # of Users

Set the maximum times a promo code can be used. After the max is reached, an "invalid" message will display when the code is used.

Event Orders (under the drop down arrow next to the Promotion Code record)

To see all the Registrants that have used the Promotional Code, navigate to Event Orders by hovering over the drop down arrow next to the promotion code record.

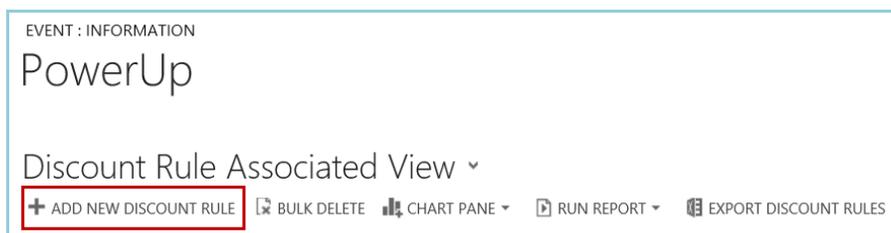


Discount Rules

Discount Rules are automatic discounts given depending on the number of registrations that are in ONE order. Hover over the drop down arrow next to the Event; select Discount Rules.



Click on "Add New Discount Rule."



Discount Description

This will be the name of the discount. It will show on the Registrant's checkout page and on the confirmation email to let them know what the discount is for.

of Registrations

This is the number of registrations that need to be entered in on *one order* for the discount to be activated.

Registration Range Start

Within the designated # of registrants set above, this is the lowest number in the range of registrations that this discount will apply to.

Registration Range End

This is the highest number in the range of registrations that this discount will apply to.

Discount Type

Specify whether the discount is to be a set dollar amount or a percentage of the registration price.

Discount Percent/Discount Dollar

This is the percentage or dollar amount that will be discounted.

Example:

"Get \$5.00 off per person when you register a group of 5 or more people on one order!"

DISCOUNT RULE : INFORMATION	
<h2>New Discount Rule</h2>	
Discount Rule	
Discount Description *	Group of 5+
# of Registrations	5
Registration Range S	1
Registration Range E	999
Discount Type	Dollar
Discount Dollars	\$5.00

"Register yourself and 2 friends at the same time and get your registration FREE!"

DISCOUNT RULE : INFORMATION	
<h2>New Discount Rule</h2>	
Discount Rule	
Discount Description *	3rd Peron Free
# of Registrations	3
Registration Range S	3
Registration Range E	3
Discount Type	Percent
Discount Percent	100.00

“Get a team together of 10 people from your school, and register them altogether, each person will receive a \$5.00 discount PLUS you’ll get the 10th person FREE!”

DISCOUNT RULE : INFORMATION

New Discount Rule

Discount Rule

Discount Descripti*	Team of 10 Discount		
# of Registrations	10		
Registration Range S	10	Registration Range E	10
Discount Type	Percent		
Discount Percent	100.00		

DISCOUNT RULE : INFORMATION

New Discount Rule

Discount Rule

Discount Descripti*	Team of 10 Discount		
# of Registrations	10		
Registration Range S	10	Registration Range E	10
Discount Type	Percent		
Discount Percent	100.00		

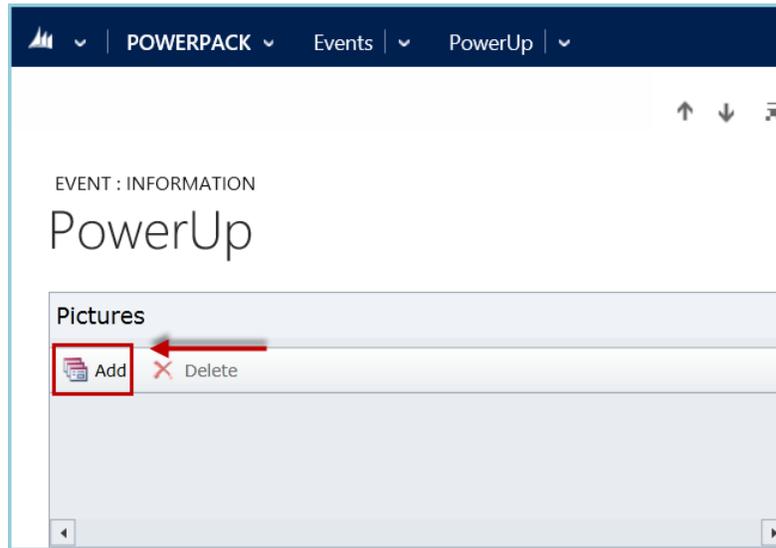
Picture Gallery

It is possible to display images on the Event Registration Page. These images will be shown as thumbnail size and may be clicked on to be viewed as larger images. Upload any desired photos to the Picture Gallery to select the images on the Event Landing Page. To do this, navigate to the Picture Gallery under the particular Event.



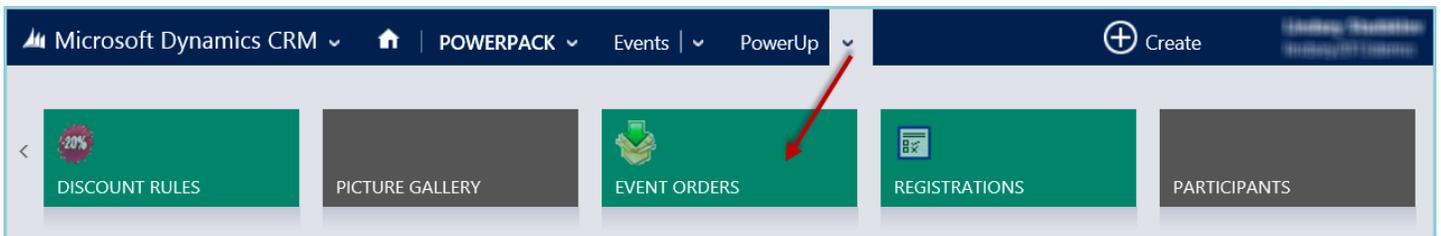
To upload a picture to the picture gallery, and click on “Add”. Only one image can be upload at a time. To delete any of the loaded images, simply select the image, and click on “Delete”. To preview any of the pictures, click on the small image.

Note: Must be an image file (.jpg, .gif, .png, .bmp) to be uploaded in the picture gallery.



Event Orders

While under the desired Event, hover on the drop down arrow and select Event Orders. You may have to scroll to the right on the ribbon if this option isn't visible. Clicking on Event Orders in the left hand navigation of the Event record, will bring up a view that will show you all of the orders that have been taken so far for the event.



This will display a view that consists of Event Order Details: Order Entered By, Event Order Date, Order Total, and paid Type. To view other information regarding the Event Order, double click on the record.

EVENT : INFORMATION

PowerUp

Event Order Associated View ▾

CHART PANE ▾
 RUN REPORT ▾
 EXPORT EVENT ORDERS

✓	Order Entered By	Event	Order Date ↑	Order Total	Paid Type
	Lindsey Stadslev	PowerUp	7/15/2014 8:5...	\$595.00	Check
	Dan El Halawani	PowerUp	7/22/2014 5:1...	\$595.00	Check
	Joe CRM	PowerUp	7/30/2014 9:2...	\$995.00	Check

Name

The name of the event the person/group is registered for.

Transaction ID

This is an automatic, sequential number that is given to all orders that are processed by ZapEvent. Either "sending check" or a long alphanumeric ID for the particular credit card transaction will be displayed here. If the credit card fails, this will be left blank and means that the participant's registration is NOT fully paid.

Order Date

The date the registrant completed the registration.

Order Total

Total dollar amount charged on the order.

Paid Type

Check, Visa, MasterCard, etc.

Promotion Code

If a Promo Code was used to register for this Event, that code will be displayed here.

Registrations

The individual or team registrations that were entered in this order.

Order Entered By

The contact who registered individually or for the team for the Event.

EVENT ORDER : INFORMATION

PowerUp-Joe CRM

Event [PowerUp](#)

General

Name *	PowerUp-Joe CRM	Order Date	7/30/2014 9:27 AM
Transaction ID	Sending Check	Paid Type	Check
Order Total *	\$995.00	Order Entered By *	Joe CRM
Promotion Code	--		

Registrations

Created On ↑	Order Entered By (Order)	Event	Activity
7/30/2014 10:08 AM	Joe CRM	PowerUp	Day 1: Pre-Conference Training
7/30/2014 10:08 AM	Joe CRM	PowerUp	Day 2-3: Powerup! The CRM Event

Order Status

Paid, Confirmation Sent, Reconciled, Charge Reminder Sent

Paid

This box will always be checked unless the credit card order failed

Confirmation Sent

This should always be checked. This registration confirmation confirms that an email has been sent to the registrant's email that was provided during registration. To resend a copy to the registrant, uncheck this box and click Save.

Reconciled

If this order has been reconciled by ZapEvent and then paid to your organization, this box will be checked. ZapEvent reconciles orders on the 1st and 15th of every month, or the first business day thereafter. By default, the check will be sent to the address provided in the PowerZapEvent registration screen. To set up direct deposit, please contact support@zapevent.com.

Charge Reminder Sent

An email is sent to the registrant a few days after they have placed their registration to remind them of the charge and that ZapEvent, LLC will be listed on their credit card statement. Once this box is checked, the email has been sent.

Order Status			
Paid *	<input checked="" type="checkbox"/>	Reconciled	<input type="checkbox"/>
Confirmation Sent	<input checked="" type="checkbox"/>	Charge Reminder Sent	<input type="checkbox"/>

Order Items

Internal Use

Track order changes.

Adjusted Code

Refunded, credited, transferred, or other: this is for the Event Director's use and does NOT affect the amount of the original transaction. It is simply a way to track changes made to the order. If the displayed choices are not relevant, a new "adjustment code" can be created.

Adjustment Amount

Amount of change to the order.

Check Received

If checks are accepted for the Event, check this box when the check payment is received in the mail.

Note

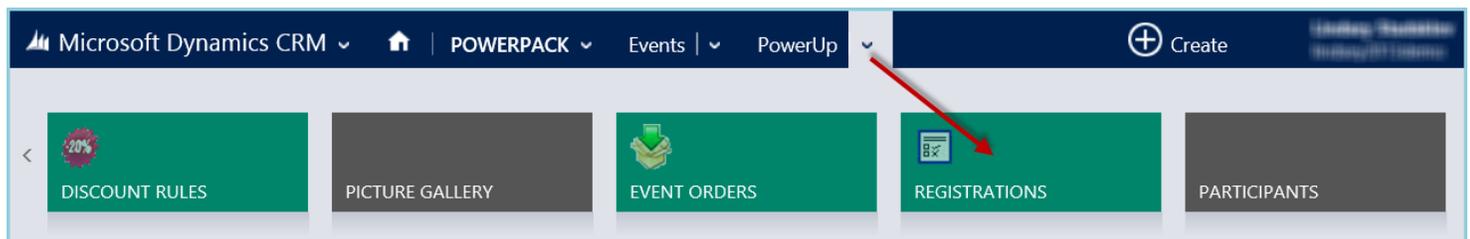
Suggest putting a note here of what the adjustment was for.

Order Line Items			
Line Item ↑		Created On	
Processing Fee		7/30/2014 10:08 AM	
Internal Use - track order changes			
Adjusted Code	--	Adjustment Amount	\$0.00
Check Recieved	<input type="checkbox"/>		
Note	--		

Note: *Adjustment code, amount, and note* are all columns that you can choose to display in your Registration Report.

Registrations

In this section you will see a list of all registrations for this event.



To view more registration details for a particular registrant, double click it to open the record:

Name

The type of registration – either team or individual

Event

Which Event this registration is for.

Activity

Which Event Activity this registration is for; if someone registers for more than one Event Activity they will have two separate registrations.

Registration Price

The price for the Event Activity that was registered for.

Registration Discount

If any discount was applied to the registration, the dollar amount of that discount will be listed here.

Registration Discount Description

The description of the discount that was applied to this registration.

Participant

Each registration can have more than one participant. All participants under this registration will be listed in this view.

The screenshot shows the 'Individual' registration details page in the PowerObjects system. The page is titled 'REGISTRATION : INFORMATION Individual'. It displays the following registration information:

- Name: Individual
- Event: PowerUp
- Activity: Day 2-3: Powerup! The CRM Event
- Registration Price: \$595.00
- Registration Discount: \$0.00
- Registration Discoun: --

Below the registration details is a 'Participant' section with a table listing the registrant:

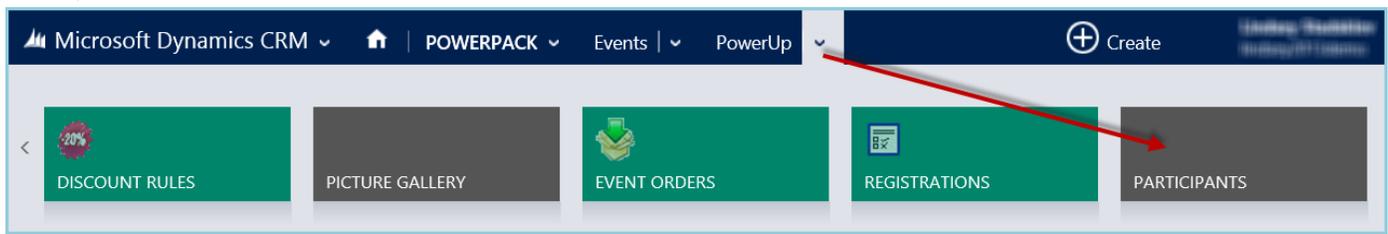
Full Name ↑	Job Title...	Company...	Business Phone...	Mobile Phone...	Street 1	City	State/Provi...	Email
Joe CRM			6123393355		718 Washington A...	Minneapolis	MN	lindsey.stadsklev@pow...

Registration Answers

If there were any questions asked of the registrant, the question and answer will be displayed here.

Registration Answers	
Activity Question ↑	Created On
How do you leverage CRM to fit your business needs?	7/30/2014 10:08 AM
How much experience do you have with CRM?	7/30/2014 10:08 AM

Participants



The Participants section provides an overview of the people that have registered for any particular event. When someone registers for an Event, they become a contact in CRM. Duplicates are detected based on first, the contact's "ZapEvent ID" (located on the contact record). If the contact's ZapEvent ID is not found in the CRM, a duplicate will be detected based on exact match on: first name, last name, and email address. If a duplicate is not found, a new contact will be created.

This participant view will show a list of all Event participants, including: their first and last name, email address, telephone number, the name of the Event and Event Activity they registered for, and the Activity price. Sort options along the top of this view may be used to sort by Event Activity, Question, and Operator. If sorting by Question, first pick the Event Activity, then the Question in the dropdown. Only Questions that are at the Participants level will be shown in the dropdown. The operator/answer filters can be used to find any specific value within any of the columns that are displayed here:

EVENT : INFORMATION

PowerUp

Add to marketing list Export to Excel

Event: PowerUp Activity: All Question: All Operator: Equals Answer:

<input type="checkbox"/>	First Name	Last Name	Email	Telephone	Event Name	Activity Name	Activity Price
<input checked="" type="checkbox"/>	Joe	CRM	lindsey.stadsklev@powerobjects.com	6123393355	PowerUp	Day 1: Pre-Conference Training	\$400.00
<input type="checkbox"/>	Joe	CRM	lindsey.stadsklev@powerobjects.com	6123393355	PowerUp	Day 2-3: Powerup! The CRM Event	\$595.00
<input type="checkbox"/>	Dan	El Halawani	lindsey.stadsklev@powerobjects.com	6513393355	PowerUp	Day 2-3: Powerup! The CRM Event	\$595.00
<input type="checkbox"/>	Lindsey	Stadsklev	lindsey.stadsklev@powerobjects.com	6123393355	PowerUp	Day 2-3: Powerup! The CRM Event	\$595.00

The buttons at the top of this view may be used to add the selected Participants to a marketing list or export the list to Excel. To choose multiple records to add to a marketing list, hold down Ctrl and click on the various Participants from the list to include. The "choose all" checkbox in the upper left corner will select all Participants displayed in this view. By default, all Participants in the displayed view are exported to Excel, when the export option is chosen.

EVENT : INFORMATION

PowerUp

Add to marketing list Export to Excel

Event: PowerUp Activity: All Question: All Operator: Equals Answer:

<input type="checkbox"/>	First Name	Last Name	Email	Telephone	Event Name	Activity Name	Activity Price
<input checked="" type="checkbox"/>	Joe	CRM	lindsey.stadsklev@powerobjects.com	6123393355	PowerUp	Day 1: Pre-Conference Training	\$400.00
<input type="checkbox"/>	Joe	CRM	lindsey.stadsklev@powerobjects.com	6123393355	PowerUp	Day 2-3: Powerup! The CRM Event	\$595.00
<input type="checkbox"/>	Dan	El Halawani	lindsey.stadsklev@powerobjects.com	6513393355	PowerUp	Day 2-3: Powerup! The CRM Event	\$595.00
<input type="checkbox"/>	Lindsey	Stadsklev	lindsey.stadsklev@powerobjects.com	6123393355	PowerUp	Day 2-3: Powerup! The CRM Event	\$595.00

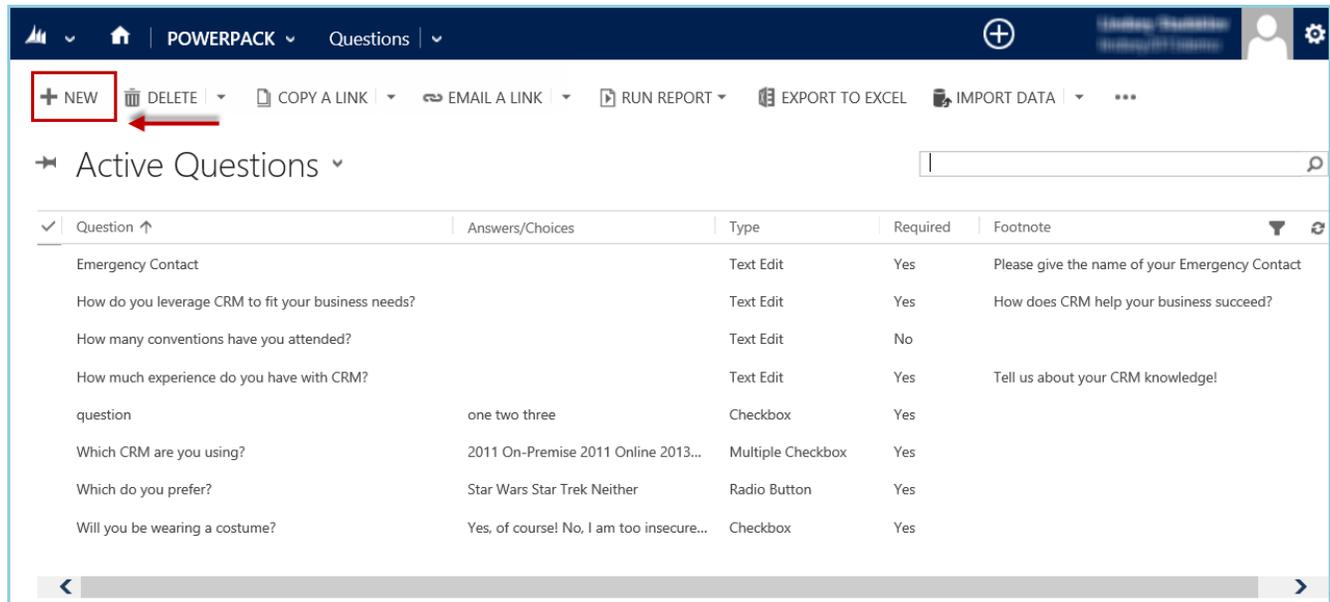
Note: Participant records will not be able to be opened from this view.

Questions

This is the Question bank for all of the Events in CRM. Questions created here, or from the Activity Question portion, will all appear in this view. These Questions may be reused for any Event/Event Activity.



To create a new question, click on New in the left hand corner.



Type

There are many types of question/answer choices:

Text Edit

This question type will allow users to input their text as an answer. This is a single line text field.

Radio Button

Needs a minimum of two answer choices. Registrants will only be allowed to choose one of the choices as their answer.

Checkbox

Needs two answers. The first choice will be for "ON" (checked), the second for "OFF" (un-checked). If you make this question required, the registrants will be required to check the box to register.

Drop-down

Needs a minimum if two answer choices. The choices will be displayed in a dropdown format, and the registrant will only be able to choose one as their answer.

Numeric Text

This will allow registrants to input a numeric value as their answer.

Multiple Checkbox

Needs a minimum of two answer choices. This will allow registrants to select more than one option as their answer.

Clock Time

This will allow registrants to put in a time of the day.

Stopwatch Time

This will allow registrants to put an answer in a stop watch format (hh:mm:ss).

Multiple Line Text

This will allow registrants to input multiple lines of text as an answer.

Dollar

This will allow registrants to input a dollar amount.

Date

This will allow registrants to put in a date as an answer.

If you'd like to associate dollars to questions, you can do so by adding a \$ sign at the end or beginning of your answer choices, along with the amount you'd like to charge. Dollar amounts can be associated to the radio button, check box, drop-down, numeric text, multiple checkbox and dollar question types.

Required

If this checkbox is selected, the registrant will be forced to answer the particular question before being able to proceed to checkout.

Question

This is the actual question asked during registration. Try to keep your questions short. A question may not begin with a symbol or number.

Answer/Choices

Depending on the Type of Question chosen, there may be a need to specify the answers the registrants have to choose from. To do so, Hit "enter" between answer choices. There must be only one answer choice per line.

Note: If "Other" is desired as an option, just use the word "Other" as an answer choice and a text box will pop up for the registrant to enter more information.

Footnote

Use this as a way to communicate more information about the questions being asked of the Registrant. This text will not appear in the available reports in CRM.

Question Image

To display an image next to the question, upload it into the Attachments area of the PowerZapEvent grouping. Add the image from the New Question form. For example, if asking a registrant/participant for their t-shirt size, a picture of the t-shirt could be displayed next to the question.

POWERPACK Questions New Question

SAVE SAVE & CLOSE NEW FORM EDITOR

QUESTION : INFORMATION

New Question

Question

Type* Question*

Answers/Choices

Radio Button Required

Do you plan to attend the PowerUp reception on Sept. 24th?

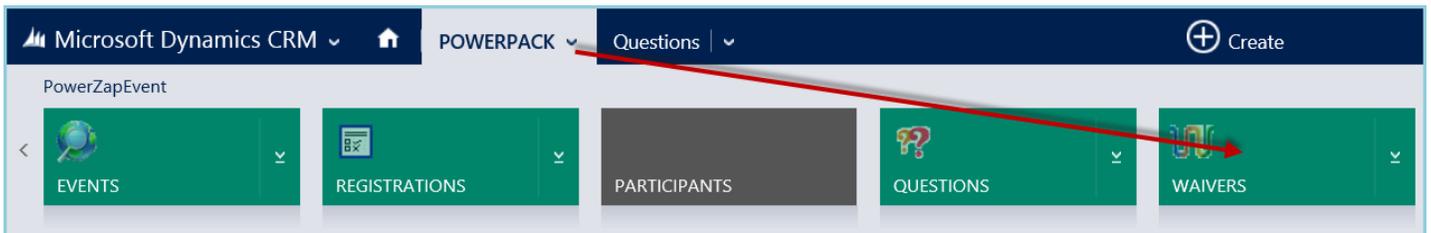
Yes
No

Footnote It's gonna be fun! 5:30pm-7:30 pm at Hell's Kitchen!

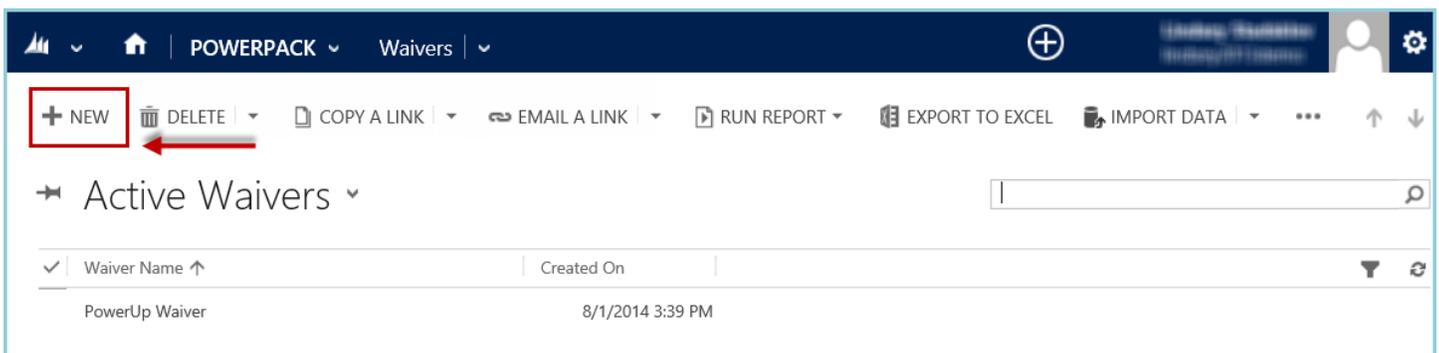
Question Image -- Select Picture

Waivers

This section allows you to upload a waiver for your event, which registrants have to accept before they are able to register. Under the PowerPack tab, navigate to the Waivers section.



In the left hand corner, select New.



Give the Waiver a name and insert the necessary text in the text area. Once finished, click Save & Close. Remember, waivers can always be edited at a later date, but the name of the Waiver *cannot* change. Saved waivers will remain in the Waiver section and are able to be used on multiple events or from year to year.

The screenshot shows the 'New Waiver' form in the PowerPack interface. The 'Waiver Name' field is highlighted with a red box and contains the text 'PowerUp Waiver'. Below it is a large text area with the placeholder text 'This is where to type the Waiver text...' and a red arrow pointing to it. At the bottom of the form, there are two fields: 'Status' with the value 'Active' and 'Waiver Key' with the value 'Active'.

Note: The waiver box only accepts plain text and does not support HTML. If your Event requires a USAT Waiver, there is NO need to paste that text here, it can automatically insert the required text. There will be a check box on the main Event record that allows a USAT Waiver to be associated to the Event:

The screenshot shows a legal document titled 'WAIVER AND RELEASE OF LIABILITY, ASSUMPTION OF RISK AND INDEMNITY AGREEMENT'. The document contains several paragraphs of legal text, including a warning to read carefully, a release of liability, and a section for the participant to agree to the terms. There is a 'Continue' button at the bottom right.

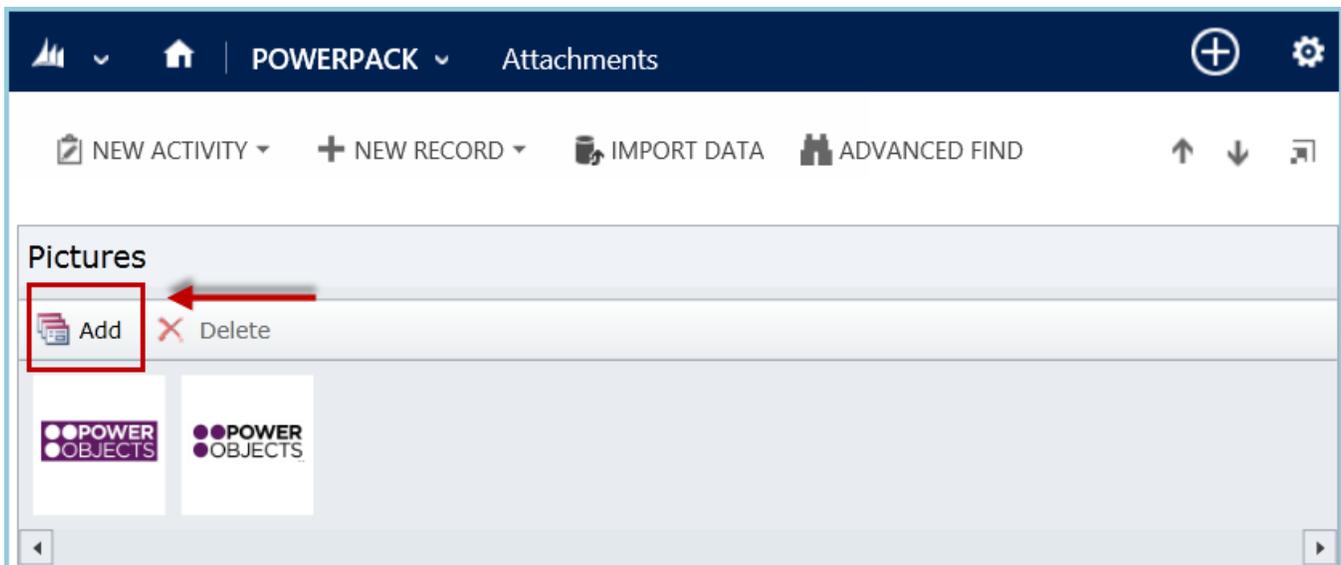
You can load multiple waivers in this section, but can only associate one waiver per event. You can also deactivate old waivers, if need be.

Attachments



The Attachments section acts just like the Picture Gallery, located under a specific Event. Images are uploaded here to be used for multiple purposes: logo file, any images to be displayed with a Question, or to be used at the top of the Event page.

To add an image, click Add. Choose the file to download, and click OK. The image will now appear in the gallery. To preview the image, click on it, and a larger preview will be available below. To delete an image, simply select the image, and click "Delete". Once an Event Record has been created, if desired, these images are available to be used as the logo for the Event.



Note: Only image files (.jpg, .gif, .png, .bmp) can be uploaded into the image gallery. Images for logos are best if they are no more than 158 pixels wide. The logo will appear in the upper left hand corner of the registration landing page. Images will remain here for to be used on multiple events or from year to year, unless they are deleted.

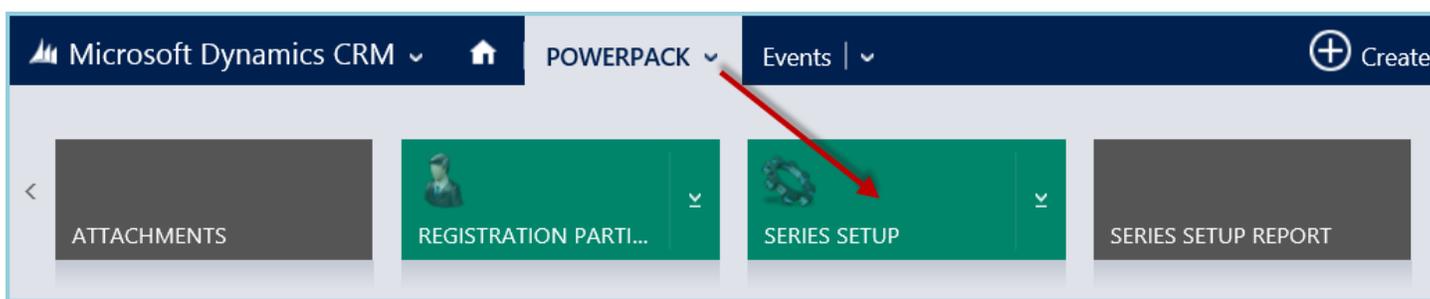
Appendix

The Registration Participant Entity

While searching in CRM or while performing an advanced find, an entity called "Registration Participant" may show up. The Registration Participant is automatically imported with PowerZapEvent, as a way to surface registration information in a flatter format. This will help with reporting and graphs/charts related to Registrations.

Series Setup

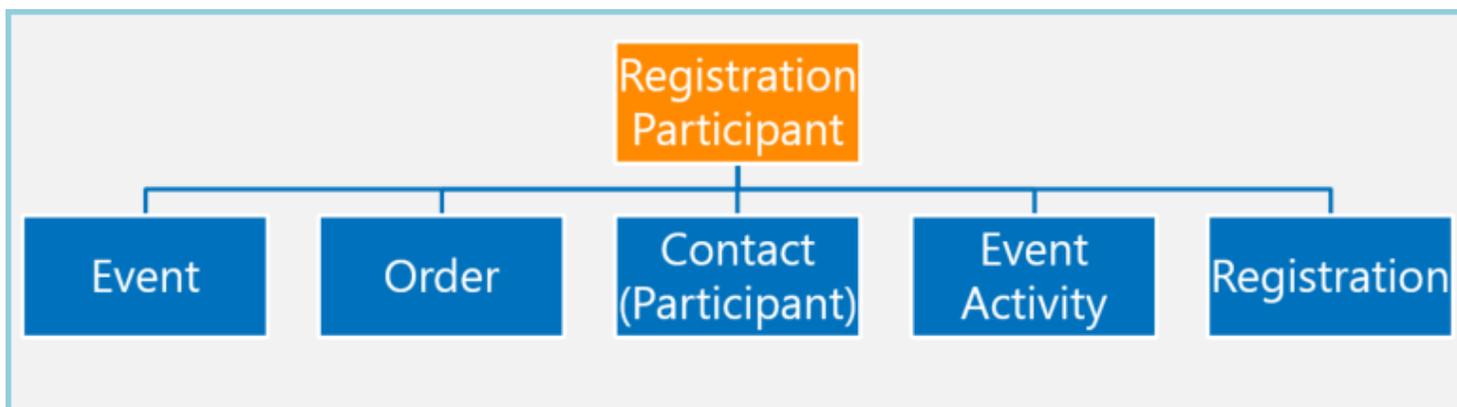
This entity allows Events to be grouped into a Series. Similar to the way Event Activities relate to Events, Events are related to Series. Within this entity, Registrants are able to register for one Event Activity and be automatically registered for others. Registrants are able to register across the specified Events for numerous Event Activities; these can all be paid for with one transaction/credit card. This functionality allows to group Events for reporting and other analytics regarding the related Events in the Series.



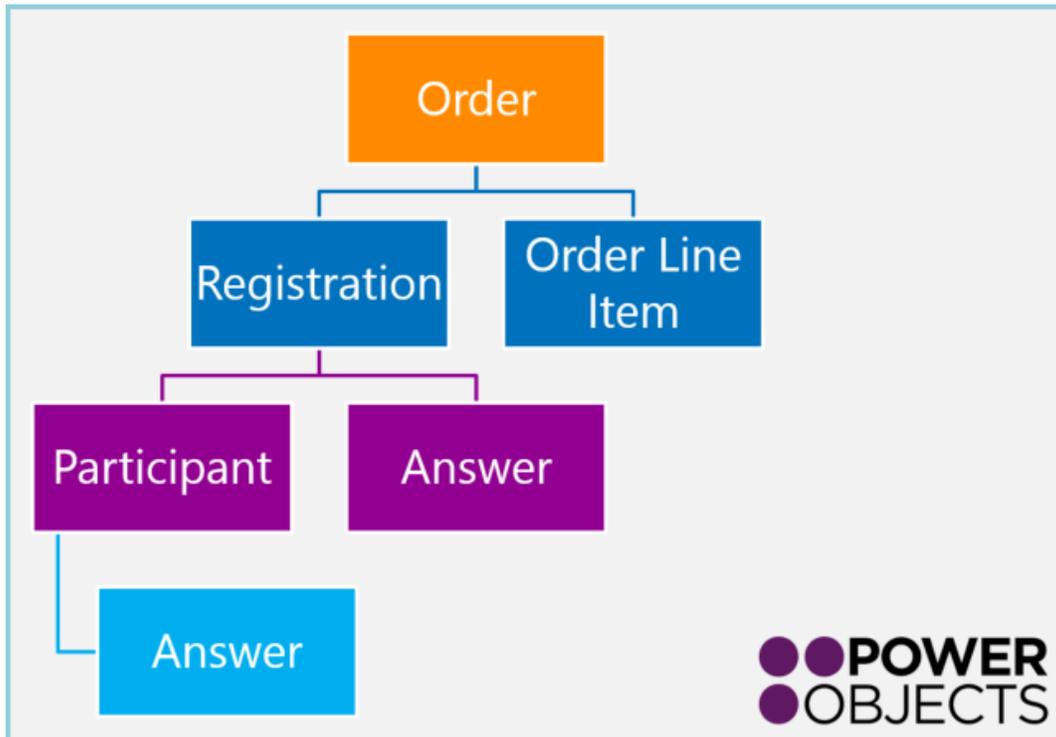
PowerZapEvent Hierarchy

PowerZapEvent has many different entities that must associate with one another. To help provide a better understanding of how PZE works, see the PZE hierarchy charts below:

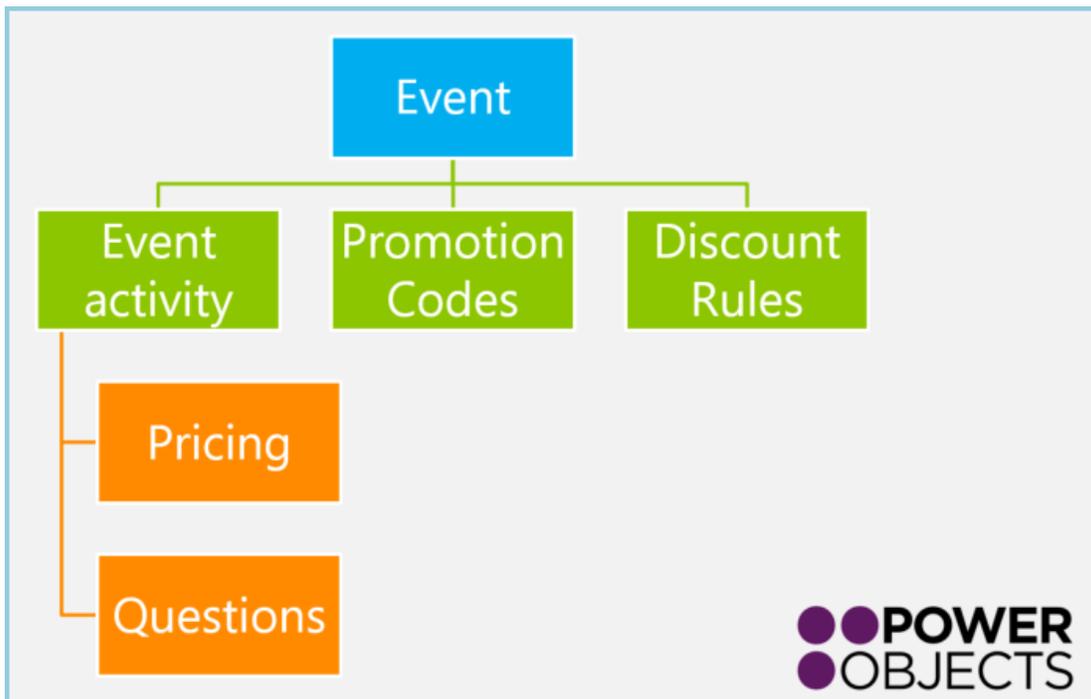
Event, Order, Contact (Participant), Event Activity, and Registration all roll up to the Registration Participant for reporting purposes.



The following entities roll up to the Order Entity: Registrations and Order Line Items, as well as, Participants and Answers (which also roll up to Registration), and Answers (which also roll up to the Participant):



Event Activity, Promotional Codes, Discount Rules, Pricing and Questions (which also roll up to the Event Activity):



Event Landing Page Sample

The Event Landing Page is a summary of the basics of the Event. The logo will appear in the left hand corner. The Main Event Description will be at the Top of the Page under the Event Name. All the Event Activities will be displayed under the Activities section of the landing page. Each Activity can be collapsed or expanded by clicked on the – or the +. Each Event Activity will show: the Event Activity description, the Type of registration, the Start Time, and the Price.

The screenshot shows the PowerUp event landing page. The top left features the PowerObjects logo. The top right indicates 'Online Registration Powered By ZAP EVENT'. Below the logo is a navigation bar with 'Register Now' and 'Contact Event' buttons, and social sharing options. The main content area is divided into several sections:

- Event Description:** 'PowerUp is a CRM educational conference hosted by PowerObjects that will take place on September 24-25 in Minneapolis, Minnesota.'
- Event Dates:** 9/23/2014 9:00 AM - 9/25/2014 5:00 PM. Online registration opens 7/6/2014 12:00 AM CST and closes 9/22/2014 11:30 PM CST.
- Address:** 718 Washington Ave North, Minneapolis, MN 55401. Includes a 'view more at google maps >' link and a map of the location.
- Activities:** A list of activities with expand/collapse icons:
 - Day 1: Pre-Conference Training
 - Day 2-3: Powerup! The CRM Event
- Event Activity Description:** 'The CRM Event'. Includes a 'Register Now' button.
- Registration Details:**
 - Type: Individual
 - Start Time: 9/24/2014 8:30 AM
 - Price: Good Through September 22 : \$595.00
- Additional Activities:**
 - Day 1: Microsoft Employee Registration
 - Day 2-3: Microsoft Employee Registration
- Registration Confirmation:** A section at the bottom right.

Continuing through the registration process, the Registrant will be directed to a screen where they will choose how they would like to register:

ZapEvent Secure Registration [Home](#)

1 Registration Information 2 Accept waiver 3 Personal Information 4 Review 5 Payment 6 Print

PowerUp

Get started in One of Three Ways.

Guest
Proceed without creating an account.

Account login is optional. Creating an account is not necessary to complete your order.

[Guest](#)

New Account
Create a new ZapEvent account to make future registrations faster.

Make placing orders faster by storing your contact info. (NOT your credit card info)
ZapEvent will never sell your information or use it for marketing purposes. We hate unsolicited junk mail as much as you do!

[Create Account](#)

Existing Account
Log in with your existing ZapEvent account. The fastest way to register.

User ID: *

User Password: *

[Forgot Password and/or User ID?](#) [Login](#)

Note: For an additional fee, it is possible for ZapEvent to create a custom "wrapper" for this page instead of the ZapEvent logo and colors.

Once the method of registration is selected, the registrant will come to the waiver screen:

ZapEvent Secure Registration [Home](#)

1 Registration Information 2 Accept waiver 3 Personal Information 4 Review 5 Payment 6 Print

PowerUp

Select Your Event Activity

<input type="radio"/> Day 1: Pre-Conference Training	Good through September 22: \$400.00	09/23/2014
<input checked="" type="radio"/> Day 2-3: Powerup! The CRM Event	Good Through September 22: \$595.00	09/24/2014

Waiver
Please scroll through and read all of the following carefully, and then check the box below

This is where to type the Waiver text...

By checking this box, I agree to the above waiver and that I am 18 years of age or older and/or the parent/guardian of a minor.

By checking this box, I acknowledge that I am 18 years of age or older and I agree to ZapEvent's "Terms of Use". I also understand that refund requests, if applicable, must be directed to the event organizer and not ZapEvent.

[Continue](#)

The Registrant will be asked to fill in their information:

ZapEvent Secure Registration [Home](#)

1 Registration Information 2 Accept waiver 3 **Personal Information** 4 Review 5 Payment 6 Print

PowerUp/Day 2-3: Powerup! The CRM Event

Participant Information

First Name: *

Last Name: *

Gender: * Male Female

Birth Date: * / / MM/DD/YYYY

Address1: *

Address2:

City: *

Country: *

State/Province: *

Postal Code: *

Phone: * () -

Email: *

CRM Questions

How do you leverage CRM to fit your business needs?: *

How does CRM help your business succeed?

How much experience do you have with CRM?: *

Tell us about your CRM knowledge!

[Cancel](#) [Continue](#)

Another person or activity may be added here. Otherwise, registrants may proceed to Check Out:

ZapEvent Secure Registration [Home](#) [View Order](#)

1 Registration Information 2 Accept waiver 3 Personal Information 4 **Review** 5 Payment 6 Print

PowerUp

Registration Information

Day 2-3: Powerup! The CRM Event **Users:** Lindsay Stedman \$595.00 [^](#)

User: Lindsay Stedman

How do you leverage CRM to fit your business needs? CRM is 100% the focus of PowerObjects.

How much experience do you have with CRM? PowerSuccess Rocks!

[Edit](#) [Remove](#) [Register Another Activity Or Person](#)

Order Summary

Day 2-3: Powerup! The CRM Event Users: Lindsay Stedman	\$595.00
----	----
Total	\$595.00

[Check Out](#)

OR

[Check out with PayPal](#)
The safer, easier way to pay

Review the order summary and select Payment Type:

ZapEvent 🔒 Secure Registration
Home | View Order

1 Registration Information
 2 Accept waiver
 3 Personal Information
 4 Review
 5 **Payment**
6 Print

Submit Order

Order Summary

Day 2-3: Powerup! The CRM Event Users: XXXXXXXXXX	\$595.00
---	---
Total	\$595.00

Billing Information

Payment Type: * Choose Payment Type ▼

Change Order
Continue

[Home](#) | [Blog](#) | [Contact ZapEvent](#) | [API](#) | [Connect:](#) [f](#) [t](#) | [Terms of Use](#) | [Privacy Policy](#) | [Security](#) | [Sitemap](#)
 718 Washington Ave. N Suite 202 | Minneapolis, MN 55401
 ©2014 ZapEvent. All rights reserved.

Registrants may review the Order before submitting it:

ZapEvent 🔒 Secure Registration
Home | View Order

1 Registration Information
 2 Accept waiver
 3 Personal Information
 4 Review
 5 **Payment**
6 Print

Awesome! You're almost done
All you need to do is submit your order. Review your order and payment. If everything is correct you must submit the order. If anything is wrong you can click change and correct the information.

Submit Order

Order Summary

Day 2-3: Powerup! The CRM Event Users: XXXXXXXXXX	\$595.00
---	---
Total	\$595.00

Billing Information

Payment Method: Check
 Write Check To: PowerObjects
 Send Check To: PowerObjects
 718 washington ave n
 minneapolis, mn 55401

Change Payment Method
Change Order
Submit Order

Once the order has been submitted, the screen below will appear and confirm the Order went through. The registrant is given the option to share what they have registered for on Facebook or Twitter:

The screenshot shows the ZapEvent registration confirmation page. At the top, there is a navigation bar with the ZapEvent logo, a 'Secure Registration' lock icon, and a 'Home' button. Below the navigation bar is a progress indicator with six steps: 1 Registration Information, 2 Accept waiver, 3 Personal Information, 4 Review, 5 Payment, and 6 Print. A green-bordered box contains the message: 'Awesome! Your order was successfully submitted. Print for your record. This is your confirmation. Please print for your records. Note your credit card will show a charge by ZapEvent LLC.' A modal window titled 'Thank you! Your order was successfully submitted.' is open in the center, displaying the text 'Sharing is caring! Tell your friends and family.' and two social media icons: Facebook and Twitter. To the left of the modal is the ZapEvent logo and contact information for PowerUp: 718 Washington Ave North, Suite 202, Minneapolis, MN 55401, United States, (612)339-3355. Below this is a table of registration items. At the bottom right, there is a 'Print' button.

Registration(s)	Price
Day 2-3: PowerUp! The CRM Event	\$595.00
How do you leverage CRM to fit your business needs?	[CRM is 100% the focus of PowerObjects.]
How much experience do you have with CRM?	[PowerSuccess Rocks!]
Order Item(s)	
Total Amount	\$595.00

Close the Sharing is Caring window to view the details of the Order:

The screenshot shows the ZapEvent registration confirmation page with the sharing popup closed. The layout is similar to the previous screenshot, but the modal window is no longer present. The registration details table is now more prominent. At the bottom right, there is a 'Print' button.

Registration(s)	Price
Day 2-3: PowerUp! The CRM Event	\$595.00
How do you leverage CRM to fit your business needs?	[CRM is 100% the focus of PowerObjects.]
How much experience do you have with CRM?	[PowerSuccess Rocks!]
Order Item(s)	
Total Amount	\$595.00

The registrant will automatically be sent a confirmation email from ZapEvent.

Registration Confirmation Sample Email

ZAPEVENT

Dear Jill,

Below is your confirmation. Please keep a copy for your records.

Registration:

Day 2-3: Powerup! The CRM Event **The Event**

Order #: 391492
Order Date: 08/04/2014
 \$595.00

Participants

Registered:	Jill CRM
Gender:	Female
Birthdate:	1/1/1987
Company:	PowerObjects
Address:	718 Washington Ave North Minneapolis, MN 55401
Phone Number:	6123393355
Email:	jill@powerobjects.com
How do you leverage CRM to fit your business needs?	CRM is 100% the focus of PowerObjects.
How much experience do you have with CRM?	PowerSuccess rocks!
Total:	\$595.00

Add Note to
Confirmation
Email

Thank you so much for signing up for the CRM Event! It will be a great time; looking forward to seeing you there!"

Thanks for your interest in PowerZapEvent. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and then enter your credit card information – you will be charged \$2/CRM user/month.

Interested in more CRM tips and tricks? Check out our [blog](#) or subscribe to our [newsletter](#).