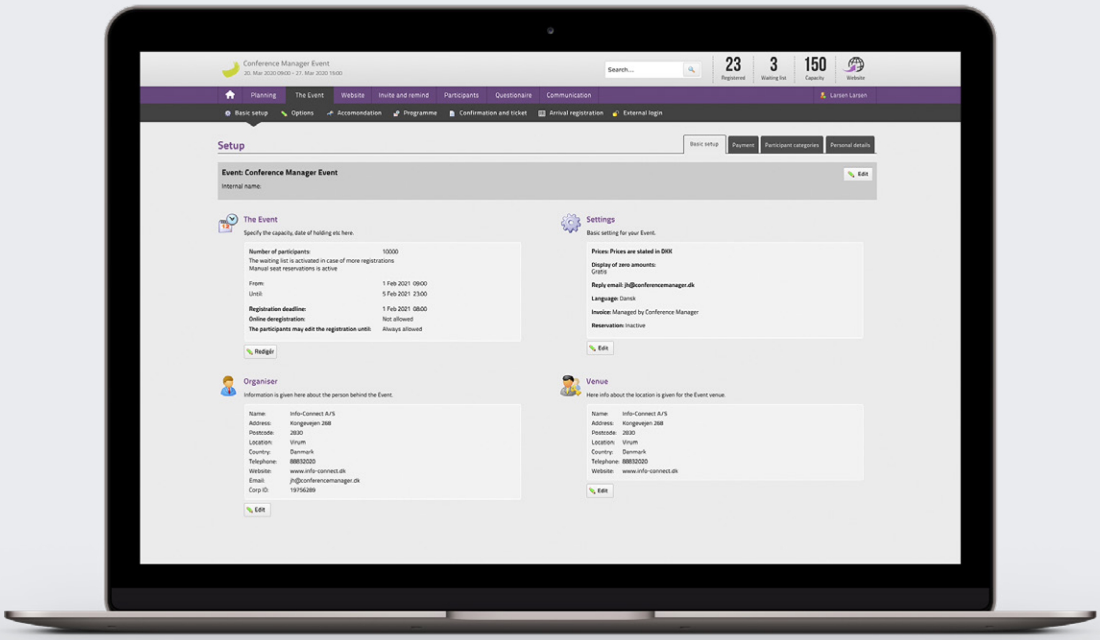
Feature guide

To enhance your user experience of Conference Manager, this overview provides you with a complete list of features and system configurability.

Conference Manager
Advanced and easy

Conference Manager makes your event planning easy

The system is built in a simple and user-friendly way. When you are creating an event all you have to do is follow the tabs from left to right.



Plan

Stay on top and plan your event down to the smallest detail.

Build

Create your event after your needs and activate the sign-up website for your participants.

Communicate

Make contact with your participants by sending out emails and texts with information about the event.

Welcome

We hope that this guide can help you obtain an overview and direct you through the creation of your event. Should you have any questions during the set-up or need some advice in regards to your event, you are always welcome to contact the support team. We are ready to help Monday - Friday, 9am - 4pm.

+45 88 83 20 00 support@conferencemanager.co.uk

Please have your conference ID ready when you contact us. You'll find it in the bottom right corner of your event. This is also where you are able to grant support access, so that we are able to see your event at the set-up.

FAQ

Visit our support page www.conferencemanager.co.uk/support.php. Here you will find a lot of valuable information regarding the system, website, communication, participants, economy and evaluation.

Data security

One of our top priorities at Conference Manager is to protect our data, systems and services. To insure the anchorage of this priority as an integrated part of our work and set-up, we are ISO 27001 certified. In practice this means that we incorporate security into everything we do as a company whether it regards separation of operations and development or the way we handle client service.

For more information, go to
www.conferencemanager.co.uk/security.php

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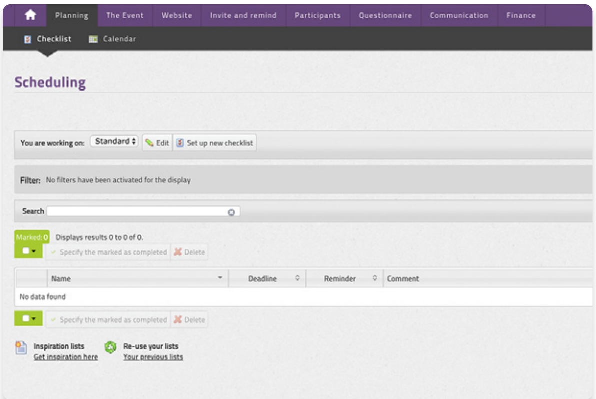
Planning

Here you have the possibility to plan your event and thereby gain a full overview of your tasks. This is where all of your lists, notes and post-it's become a joined to-do list.

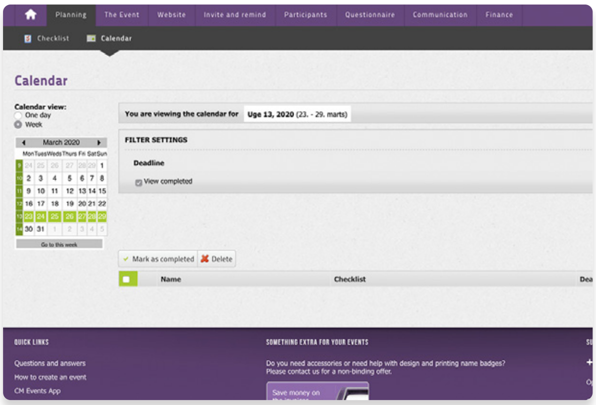
Checklist

Set up the checklist with task items. Arrange the items however you wish with deadlines, notifications and comments. When a task has been solved you can mark it as completed to keep an updated overview.



Calendar

When you set up the task items you will be able to see them in the calendar. Choose between daily or weekly view to see the tasks for a specific period of time.



The Event

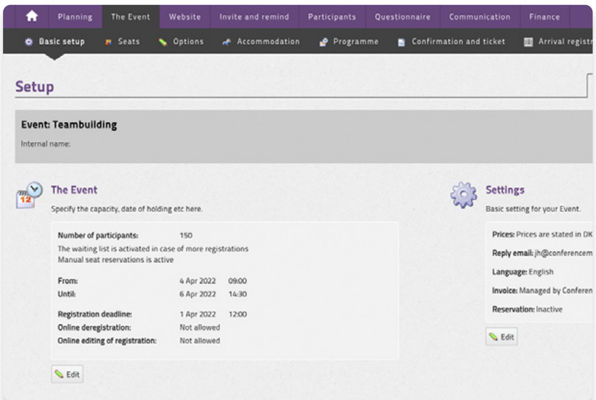
When you set up a new event, you automatically start out in the tab "The Event" where you will be guided through the first step of the set-up. This is also where you can grant access to your colleagues and later on in the process the page will contain an overview of registered participants for participant categories, options, program etc. just as you will be able to keep track of any failed emails.

Basic setup

Basic setup

This is where you enter the general data for the event such as capacity, dates, venue and so on. This is also where you decide the website language, whether the event is free or you want to set prices, and in that case how invoicing should be handled.

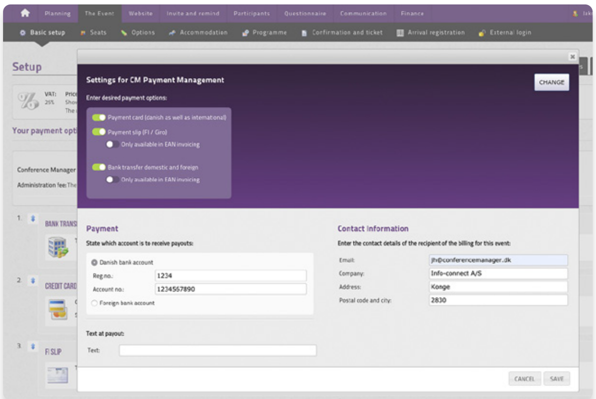
Attention! If you activate pricing on your event the tab "Payment" will appear.



Payment

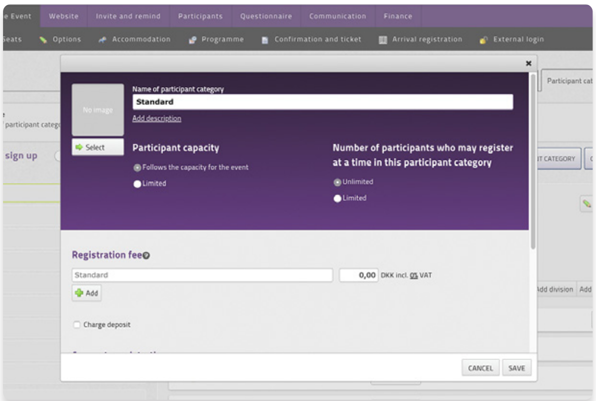
This is where you choose the payment options for the participants either through Conference Manager Payment Management or your own payment solutions. If you are using the CM invoice module, this is also where you set the VAT rates.

Attention! The invoice module is an additional purchase module in Conference Manager.



Participant categories

This is where you can create one or more participant categories and companion categories. This gives you the opportunity to distinguish between your participants and differentiate the signup process for each category. You can control how many participants can sign up for each category, and you can also make the setting that sign-up for a category requires invitation and it that way work with open and closed categories.

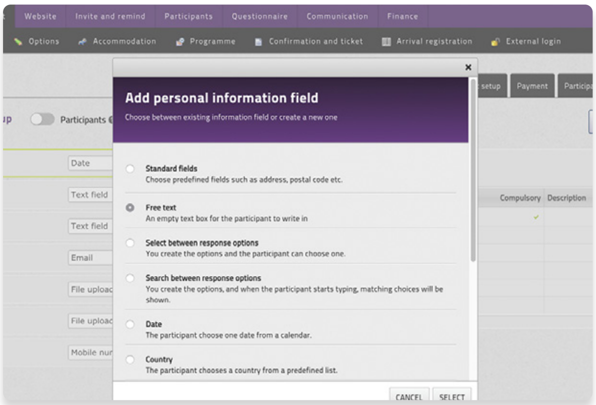


Attention! If you have payment on your event, the category Order responsible will appear. Information regarding the Order responsible will be used to request payment and handle invoicing.

Attention! If sign-up for your event requires approval from either a manager or the organizer you can activate the feature "Manager approval" in the settings for participant categories.

Personal details

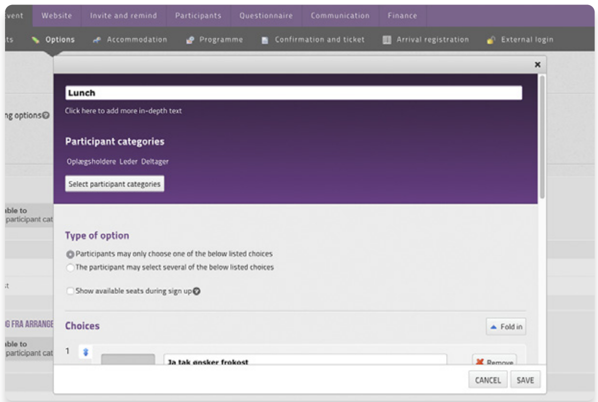
This is where you add information fields in order to gather the data you need regarding the participants. Information fields can be set to different formats; free text, response options, calendar etc. You can make use of the standard fields or customize you own to fit your specific event. For each information field you decide which participant categories it should be available to and if the field is mandatory or not. Information fields can also be added in the Participant Categories tab.



Attention! If you wish to send text messages to the participants remember to add the standard field "Mobile phone".

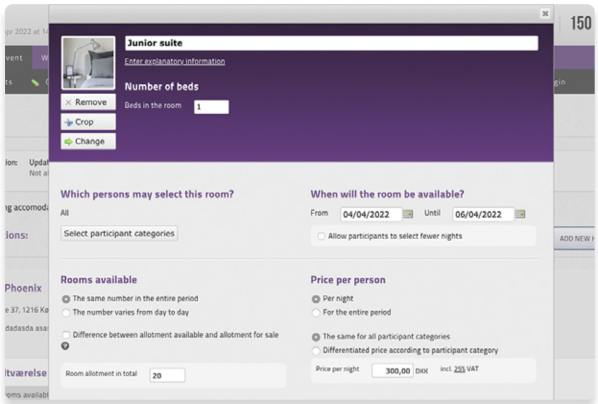
Options

Here you can add option choices to the sign-up process. This can be used for e.g. an optional dinner, sign-up for workshops or transportation to the event. In the settings for each option you decide which participant categories it should be available to. You can specify the capacity, decide whether making a choice is mandatory and if there is pricing on your event, you can differentiate the price based on participant categories.



Accommodation

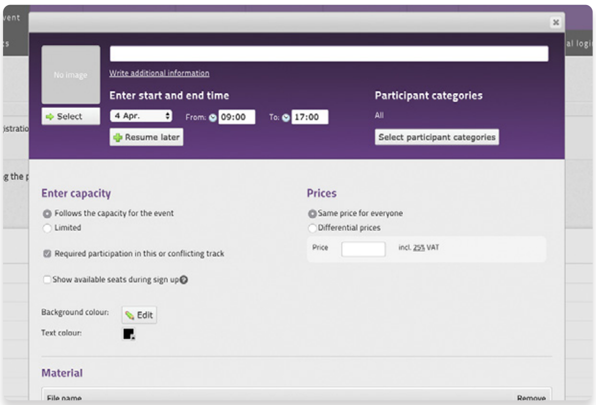
The possibilities for accommodation are defined exactly as you like. For example, the system is able to manage arrival and departure dates as well as individual requests regarding accommodation. You can differentiate prices and settings based on participant categories. Depending on the settings you have made, the participants can during the signup process choose where they want to stay and maybe even invite a particular roommate to share a room.



Programme

The programme is build by using tracks that you create using text, colors and images. If you set up parallel tracks you can have the participants choose during the signup process which track, they wish to participate in. You can differentiate the prices for the tracks between the participant categories.

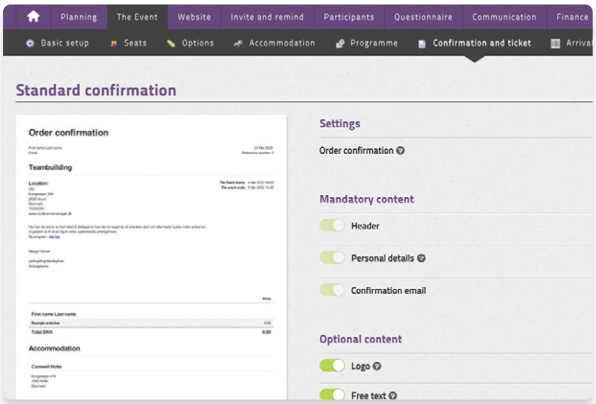
Attention! The programme can be printed as a PDF and will be shown in the CM Events app. It can also be transferred to the confirmation and the nametags.



Confirmation and ticket

Order Confirmation

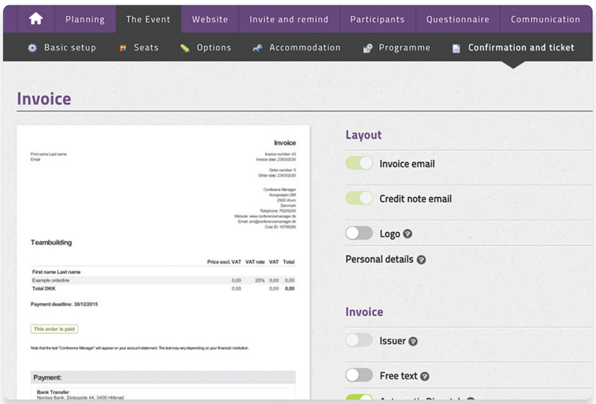
The order confirmation is the confirmation that is sent to the participants and potentially an order responsible after the sign-up. You have the option of choosing which elements you want shown on the confirmation and edit the confirmation email. You can also insert an image/logo on the top of the page and you can write your own text on the confirmation.



Invoice

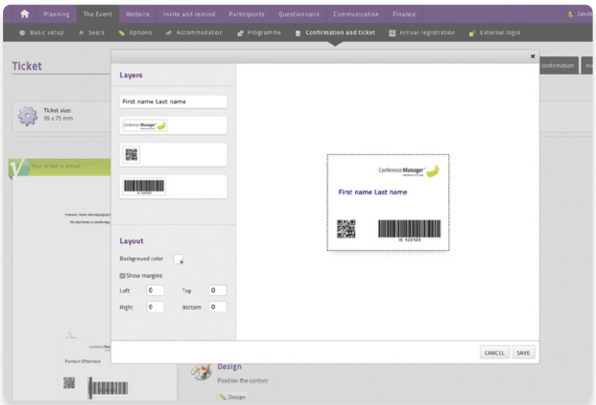
If you have payment on your event and have chosen to use the Conference Manager invoice module, this is where you can edit the invoice settings. The invoice will be sent to the order responsible.

Attention! Remember to check if you have activated Automatic Dispatch on the invoice.



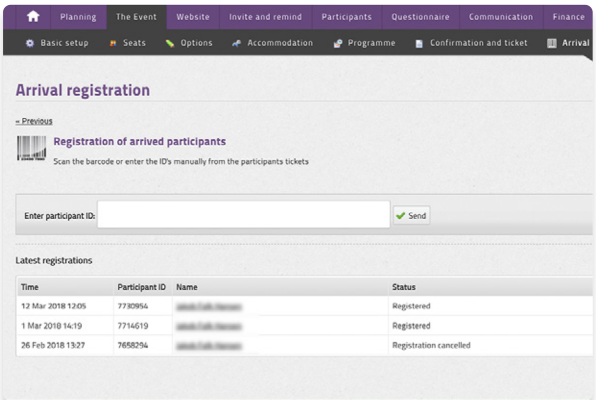
Ticket

Here you can design a ticket for your event. The ticket will automatically contain a barcode which can be used for arrival registration. If you choose to create a ticket and activate it, it will be sent out as an attachment to the confirmation email. You can also choose to design the ticket at a later date and then send out a link to download the ticket when the event date is near.



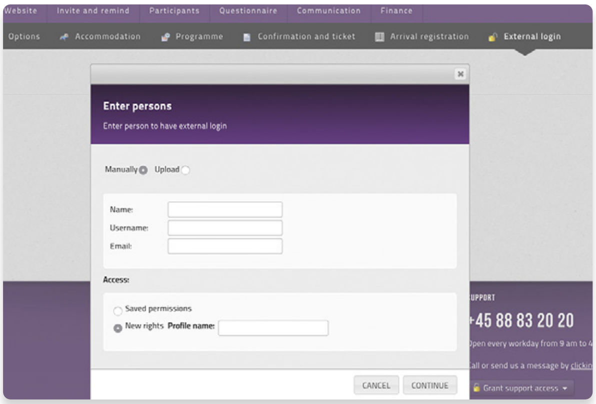
Arrival registration

If you have created a ticket with a barcode or have added a QR code to the confirmation you can register the participants upon arrival. As a free feature for arrival registration, Conference Manager offers the app CM Exhibition. With the app you can quickly and easily scan the tickets of your participants.



External login

With an external login you can grant access to relevant persons to retrieve lists - for example the hotel, that requires lists of participants who have selected a room or has special requests regarding food. You can also grant external access to arrival registration and participant registration.

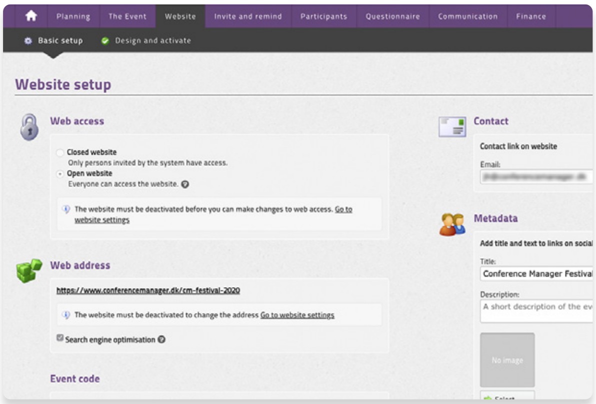


Attention! Remember that your partners or participants have to type the login manually.

Website

Here you will find the statistics for your website that shows the number of visitors and online signups broken down by dates. This is also where you control the basic setup for the website as well as design and build the look and content of the event website and manage activation.

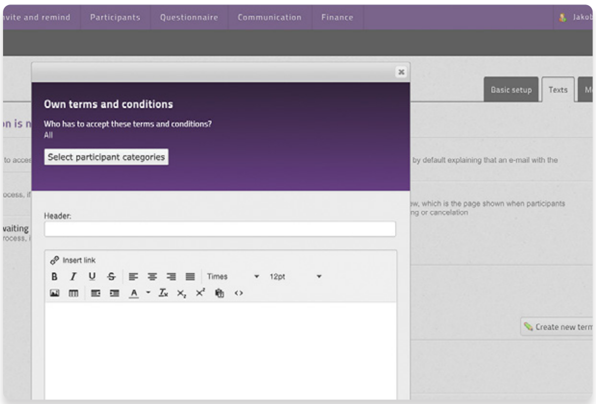
Basic Setup



Basic Setup

This is where you enter basic data regarding the website such as “Web access”, “Web address” and contact email address.

Decide whether you want your website to be open or closed. If it is an open website that can be accessed by anyone, you have to set up a web address for the event using the free domains. Furthermore, you have to assign an email address that will become a link on the website, so the participants can get in touch with you. If the website is closed you have full control over who gets access to the website.

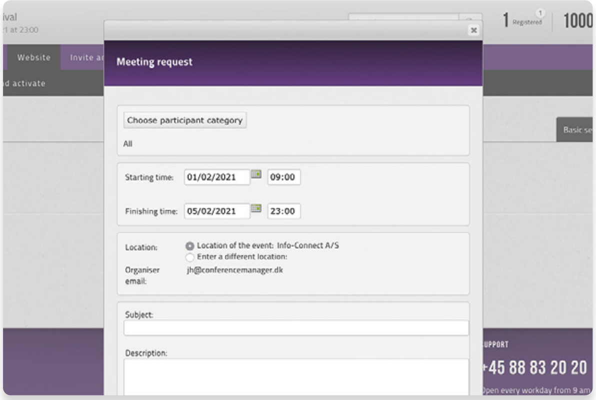


Texts

This is where you can edit the systems default texts in both the website as well as the participant emails. This is also where you insert your own privacy policy which we recommend.

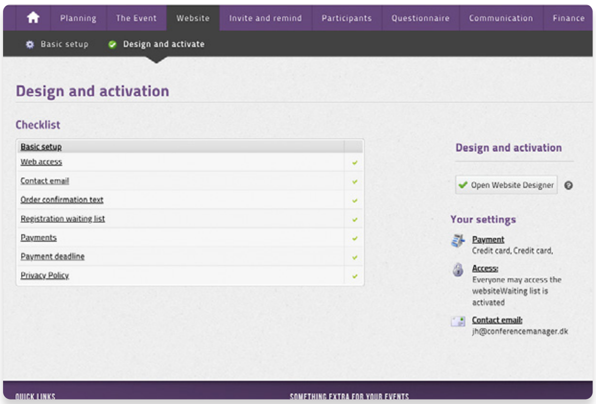
Meeting requests

Here you can create a meeting request either for all your participants or for specific participant categories. When they accept, the meeting request will be placed directly into the participants calendar.



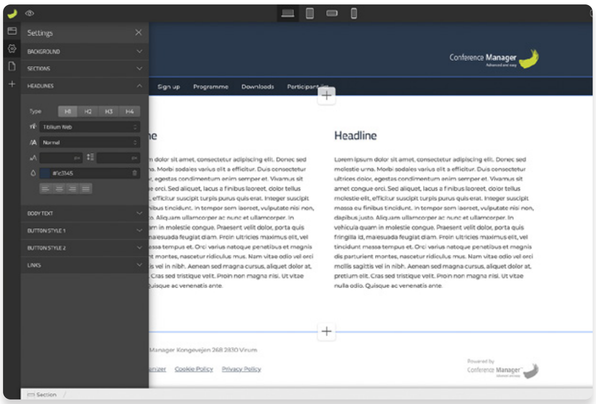
Design and activation

In this tab you have a checklist of the main settings in your event. Here you can see if there are any settings you have to take into account before activating your website. This is also where you access the Website Designer and finally activate your website.



Website Designer

In the Website Designer you design and build the event website to have exactly the look that matches your event. You can choose between different standard themes and then you modify elements and settings to achieve the desired look. You can e.g. insert a logo, change the background colour, insert pictures, videos and much much more. It is also in the website Designer that you choose which pages you want activated on your website, just like you can add custom defined pages.

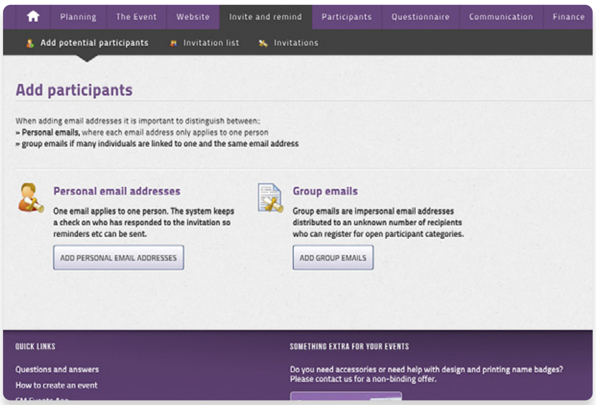


Attention! The logo you upload will automatically be transferred to all emails sent from Conference Manager e.g. invitations and order confirmations. Remember to upload the logo in a size suitable to the mail layout.

Invite and remind

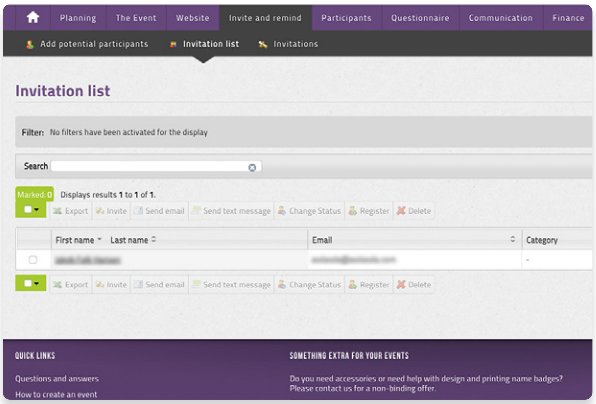
When your event site has been activated and you are ready to receive sign-ups you need to guide your potential participants on to the website. This can be done in multiple ways. You can for example choose to share a link in a newsletter, put the link on your own website or suchlike, but you can also choose to send out a personal invitation via Conference Manager. When using this feature, you can invite participants to sign-up for a specific participant category and you can keep track of who has not yet signed up and potentially send them a reminder.

Add potential participants



This is where you add the potential participants, that you would like to invite to the event. Their information can either by typed in manually or you can upload them all at once via an Excel file. The system requires an e-mail address as minimum, but you can add information on each person equivalent to the personal information fields created. When you have added the information, the participants won't have to fill this out at sign-up.

Invitation list



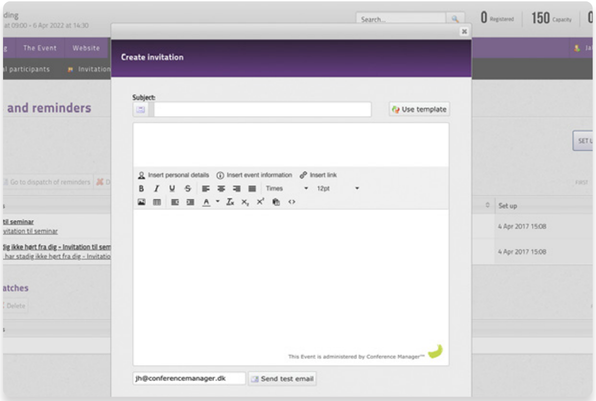
On the invitation list you have an overview of the potential participants who have not yet signed up. In the column "Status" you can see whether they have been invited, if they have replied with a "No thank you" or if they haven't been invited yet. From the list you are also able to edit in the information of the potential participants, send them an e-mail or even to register them directly.

Attention! If you as the organizer need to sign-up participants, this is done by adding them to the invitation list and then making the registration directly from the list.

Invitations

This is where you write the invitation to your event. You can easily have different types of invitations so that you for example can differentiate based on participant category. It is important that the invitation contains a correct invitation link. This is created by inserting a link and then choosing from the dropdown-menu, that the link shall go to a page on the website. Then the system creates a unique link for each potential participant. You also have the option to insert a "No thank you"-link. If this link is clicked on by the potential participant, it will be noted, that they won't be able to make it, and when you at a later point are sending out reminders, they will automatically be filtered out.

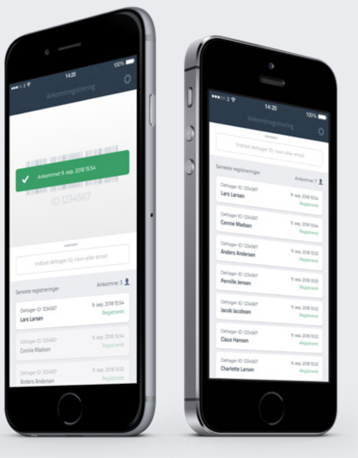
Attention! Be aware that the invitation link is personal. If an invitation is meant to be forwarded, we recommend to use a manual link to the event website.



Register participants for arrival with the CM Exhibition app

With this feature you can easily and quickly register the arrival of your participants at your event. Keep track of arrival times, payments and participant categories.

For more info: www.conferencemanager.co.uk/features/apps/cm-exhibition.php

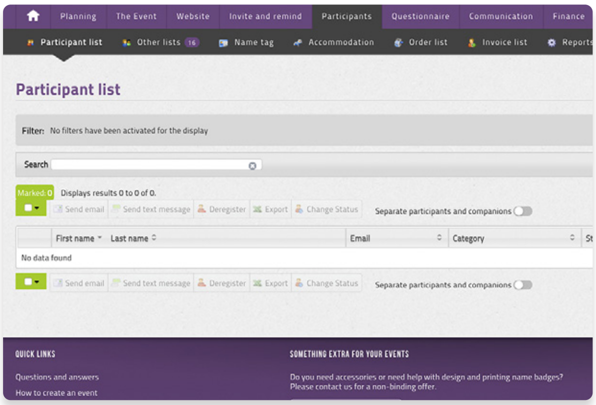


Participants

In this section you have the full overview of your participants. You create your lists based on information of your choosing. On the top right of the lists you can add filters or choose which columns you want to be shown in the lists.

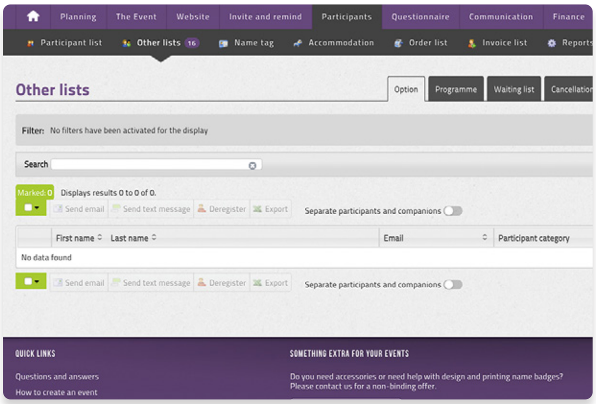
Participant list

The participant list is the list of all registered participants on the event. In this list you can see the participant information and information regarding time of registration, latest update and participant category. From the list you can click the name of a specific participant to see further details of their registration or to make changes. All lists can be exported to Excel.



Other lists

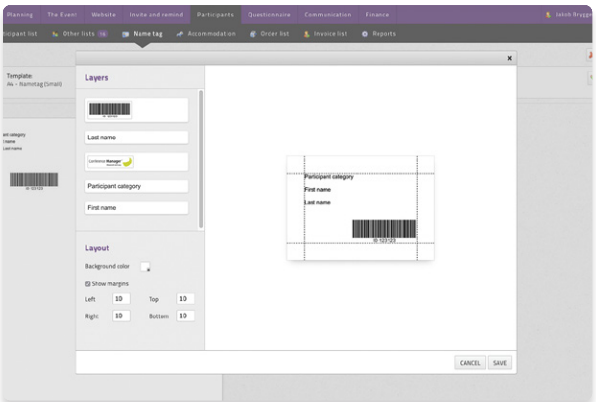
With Other lists you have the option to filter the participants based on their registration regarding options and programme, and you can hereby obtain a complete overview of your participants and their choices. This is also where you'll find the waiting list and cancellation list.



Attention! You can also export a complete participant list to Excel. This is found under "Downloads" on the right side of the page, when you have clicked "Participant" in the purple bar.

Material

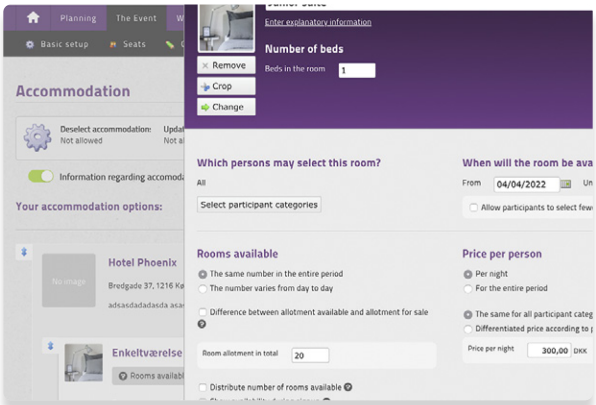
Here you have the option to design name tags, table cards and certificates. You choose the format, which elements it shall contain and design the layout. When you have designed your material, you can either print it to a .PDF or send it directly to the participants. From various filters you can easily choose which participants the material shall be issued for. For example, you can choose that only participants who have answered a submitted questionnaire should receive a certificate.



Accommodation

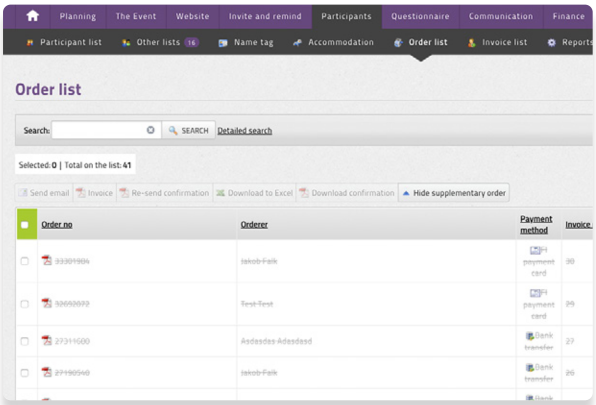
Here you find the lists that relates to accommodation. The lists can be exported directly to Excel and eg. handed out to the hotels.
In the Room list you can sort according to rooms and hotels, and you can also move the guests from room to room if needed.

In the Participant tab you can sort according to the participants accommodation selections.



Order list

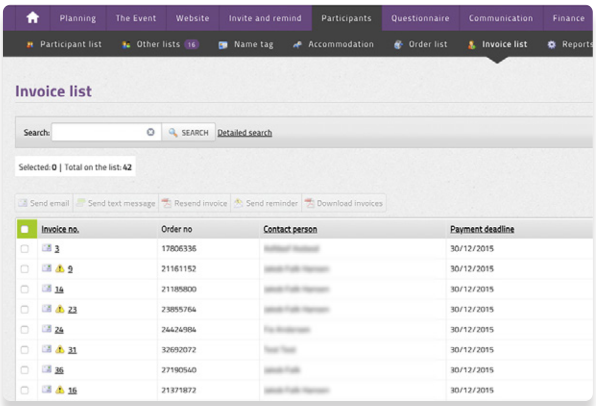
Each registration has a unique order number and will appear on the order list. This list is particularly interesting if there is payment on the event. Keep track of your balances as well as your invoice and payment methods for all orders on the event.



Invoice list

When using the Conference Manager invoice module, the invoice list is where you can find a list of all invoices that has been send out. On this list you can get an overview of the balance for each invoice, you can see if the payment deadline has been exceeded and you can resend invoices or send out payment reminders.

Attention! From both the order list and the invoice list the individual orders can be accessed – if you need to take a closer look to the details and content of an order.



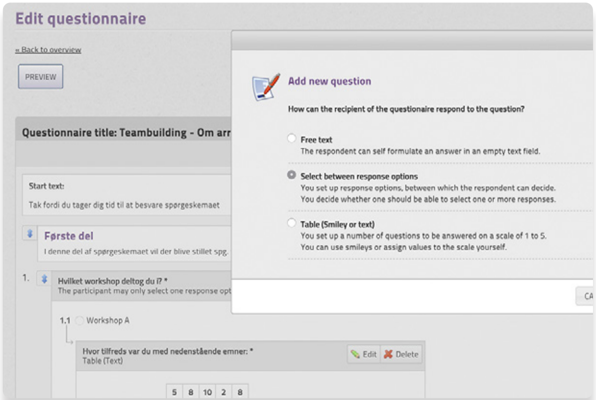
Questionaire

With the questionnaires you can easily involve the participants before the event or send them an evaluation after the event. Access the answers as graphic reports or as raw data in Excel that you can then process yourself.

Questionnaires

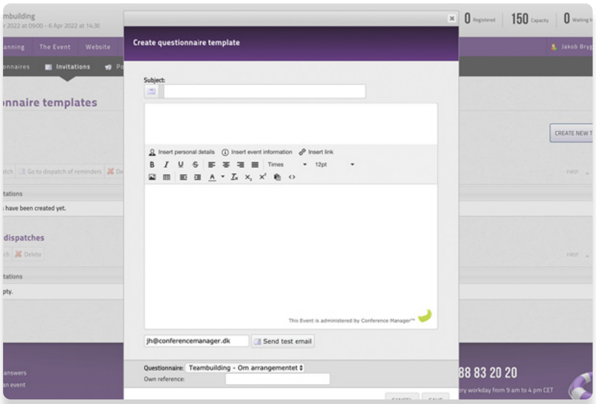
Here you can create and design questionnaires. You write the questions yourself and choose whether the answer should be in free text, response options or on a scale. You can also divide the questions in subjects by using headers.

Attention! The questionnaires in Conference Manager is as a standard answered anonymously. If you as an organizer wish to know who answered what, you will have to add a question asking for the respondents name or e-mail.



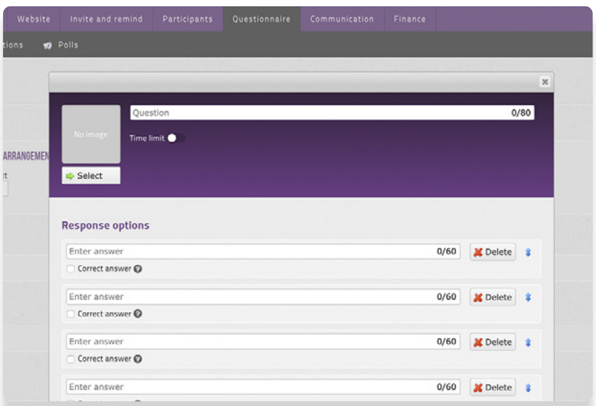
Invitations

When the questionnaire has been created and prepared it is send out via a questionnaire invitation. You create the invitation, write an email text and insert a link to the questionnaire. When sending out the invitation you choose the recipients. You can for example choose only to send it to participants who has been arrival registered.



Polls

Interact with your participants during the event by interactive polls, by continually receiving questions or carry out quizzes and competitions. The participants can use the CM Events app to participate.

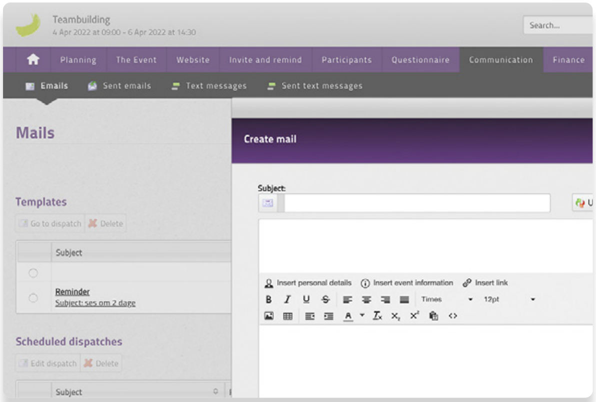


Communication

Communication gives you an overview of which emails and text messages has been sent out as well as providing you with the opportunity to communicate with your participants.

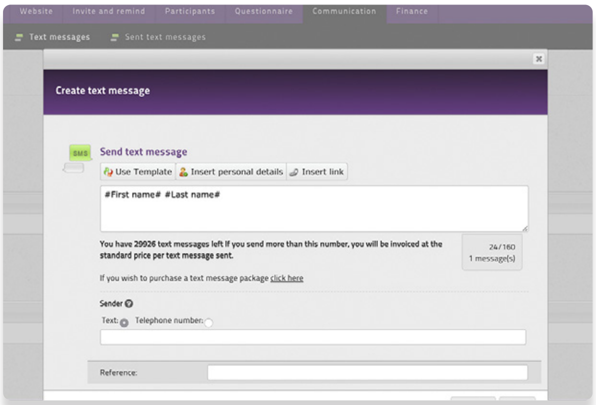
Emails

Here you can create email templates that you wish to send to your participants. In emails you can eg. link to the participants registration, information on the website or pdf files that you have uploaded. You can also schedule future dispatches.



Text messages

Here you can create text message templates that you wish to send to your participants. Note that they will not be able to reply. You can also schedule future dispatches.

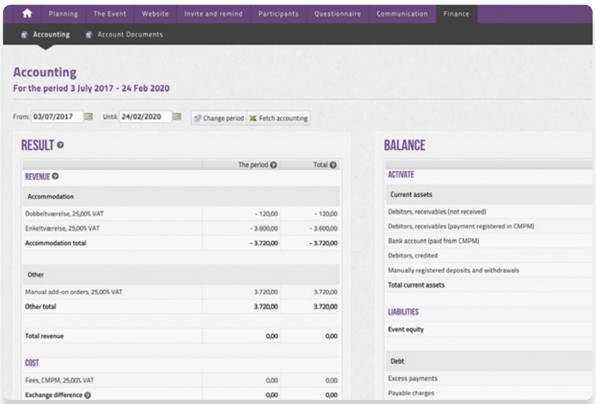


Finance

If you use the Conference Manager invoice module and Conference Manager Payment Management you will have the menu point Finance in the purple bar. Here you can quickly get an overview of the turnover and you can of course also get detailed information regarding the economy in the event.

Accounting

Here you can see the financial statement divided into Result and Balance. The financial statement contains all the posts from the event in Conference Manager. You can choose which period the statement shall cover and you can export it to Excel.



Account Documents

When Conference Manager Payment Management is used a payment report is formed each month. The payment reports are sent by e-mail to the contact person stated in connection with the payment setup, and under this tab you can always find all payment reports associated with the event.