

ATTEND MOBILE **USER GUIDE**

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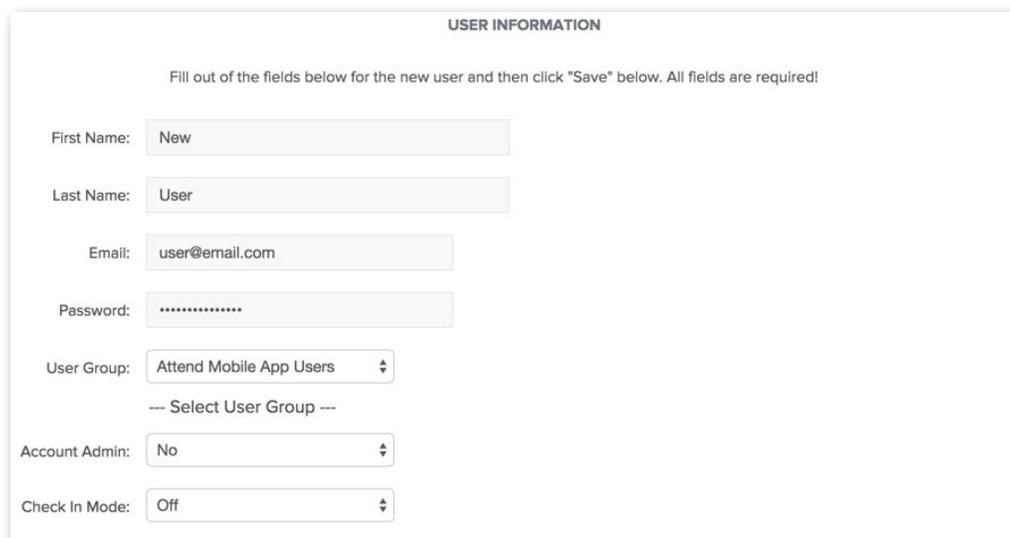
OVERVIEW

This guide provides an overview of how to successfully configure and use the Attend Mobile app for your events. It covers how to give users access to the app as well as a recipe for success for pre-event, onsite, and post-event use cases.

CREATE NEW ATTEND USER ACCOUNTS

From the Attend Dashboard, navigate to Account Settings and then click on Account Users. From here, you'll be able to add new users that will be able to use the Attend Mobile app. Click on the "New User" button and fill out the profile information.

Also be sure to turn Check In Mode "off" for any users who will not be checking in guests. This will allow them to have access to all of the other great features that the app offers but not put them in a position where they may change a check in status unintentionally. Let's play it safe!



The screenshot shows a form titled "USER INFORMATION" with the instruction: "Fill out the fields below for the new user and then click 'Save' below. All fields are required!". The form contains the following fields:

- First Name:
- Last Name:
- Email:
- Password:
- User Group: (dropdown menu with "Attend Mobile App Users" selected and "--- Select User Group ---" below it)
- Account Admin: (dropdown menu with "No" selected)
- Check In Mode: (dropdown menu with "Off" selected)

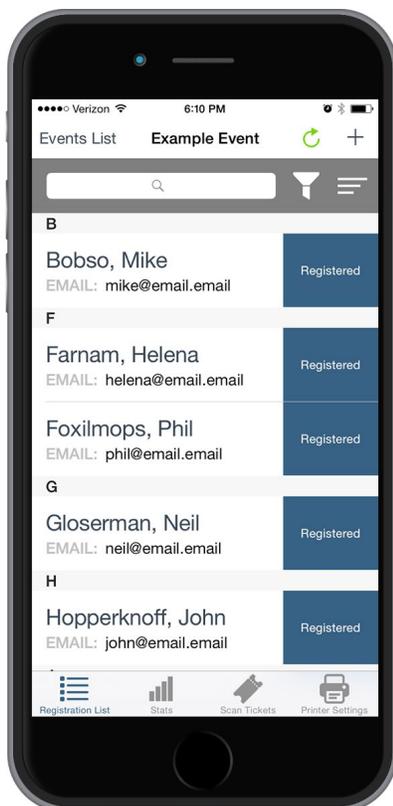
If you haven't already, be sure to create a User Group to keep track of all of the users that are using the app. By default, we create the "Default User Group" that you can add people to.

Create as many users as you need to and then move on to the next step. You can come back and add additional users at any time.

PREPARE FOR YOUR EVENT

Now you're ready to get started using the app! The Attend Mobile app is designed to provide all members of your event team an up-to-date view of how your event is progressing. That starts with the pre-event invitation and registration process.

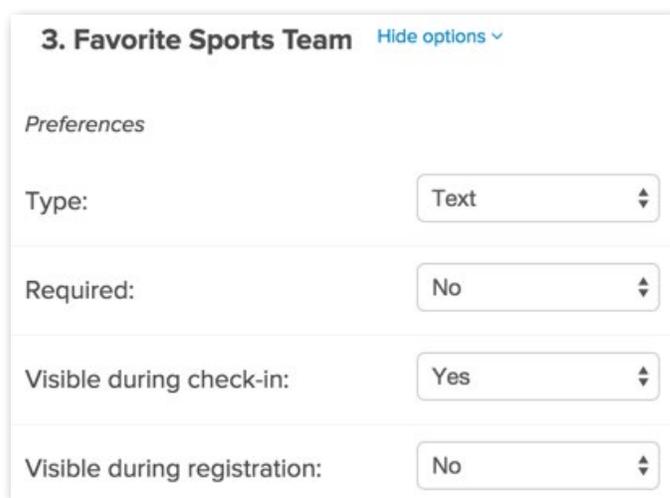
Whether you use Attend or another product to invite people to your events, there's no better way to drive attendance than a person-to-person interaction. Attend Mobile provides real-time visibility for Sales and Customer Success teams to stay on top of who has registered for your events, so they can reach out as appropriate to connect with important guests or nudge the ones that need a gentle reminder to register.



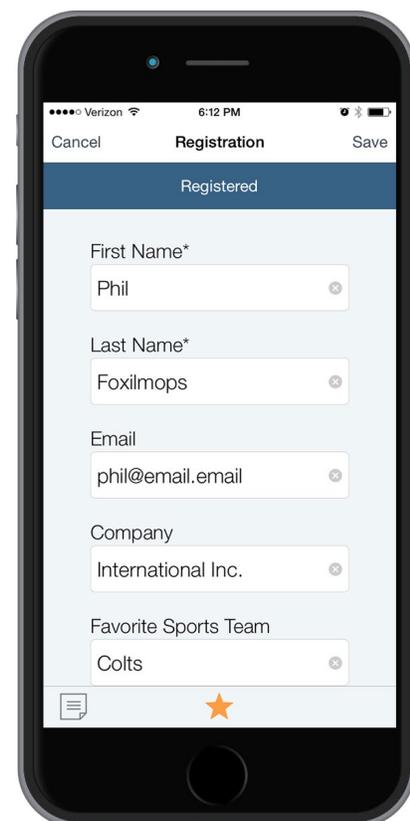
Let's get going. Navigate to the event you want to check on in the Attend Mobile app. Depending on the size of your attendee list, it might take a short time for the event to load. Once your event has loaded, you should see a list of Attendees.

To find a specific guest, you can use the Search feature. You have the ability to search by name and profile information. You can also tag attendees as "Favorites," and filter a guest list by your individual favorites. This is a great way to slim down the list, which will give you your own customized view of the event.

You can also add Hidden Fields to your event. This will allow you to display information about your guests in the app that they won't see. To configure Hidden Fields go to the Event Settings page on the Attend dashboard, select the field(s) you'd like to hide and select "no" from the drop down next to "Visible during registration." This will hide the fields during the registration process but still allow you to view the information from the app. This information may come from a CSV that you've uploaded or from Salesforce if you've synced with your CRM.



Setting	Value
Type	Text
Required	No
Visible during check-in	Yes
Visible during registration	No



Field	Value
First Name*	Phil
Last Name*	Foxilmops
Email	phil@email.email
Company	International Inc.
Favorite Sports Team	Colts

The rest is up to you! If there's someone that hasn't registered yet, reach out to give them a friendly reminder. For those that have already registered, this is a great time to schedule face time at the event.

HAVE BETTER CONVERSATIONS ON-SITE

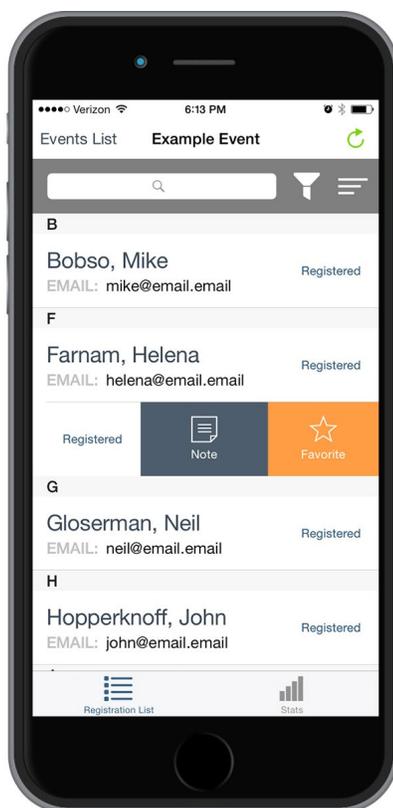
Now that you've done all of the hard work, it's time to have some fun! The challenge now is making sure that you connect with all of the people you worked hard to get there. This is another great use case for the app.

One of the bigger challenges with conversations at events is remembering what was discussed. Often times we all run back to our hotel rooms that night, empty our pockets of business cards and take notes. Maybe you have a few words jotted down as a reminder but that's it. With Attend Mobile, that imperfect process all goes away.

Let's get going! Start by filtering the Attendee List by your Favorites. This will provide a nice clean view of the people you need to hit up at the event.

It's time to take notes! It's important to note that you need to create a Custom Field on your event in order for the Notes feature to become active in the app. Log into the Attend Dashboard, navigate to your event and create a custom field called "Notes." This can be done on the Event Settings or on the Form Build page.

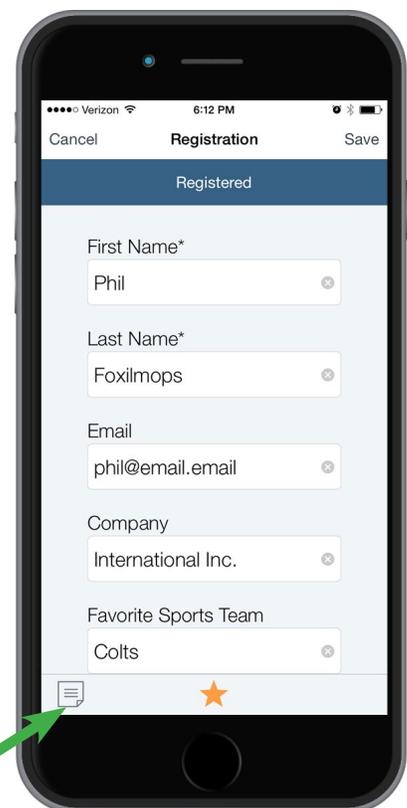
After a conversation with an attendee, find the person you spoke with on the guest list. There are two easy way to access the Notes view.

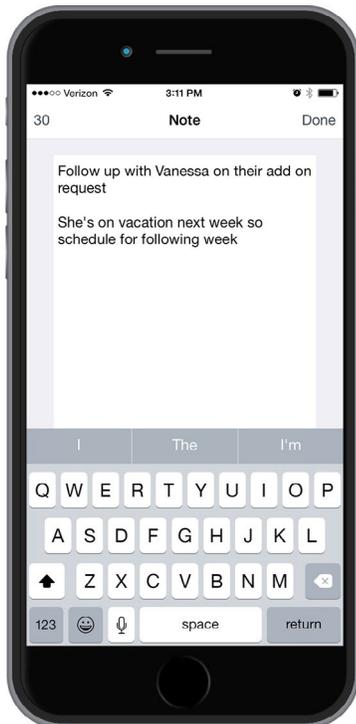


From the List view, you can swipe left and click on the "Note" button. This will open up a Notes window where you can jot down your takeaways and follow up actions in a few quick seconds.



You can also access Notes from the Profile view. Once you've clicked into someone's profile from the list, click on the Notes icon in the lower left hand side of the app. The same window will pop open for taking a few notes.





Within the notes field, you'll have the option to use the keyboard or Siri dictation.

The notes field can accept up to 140 characters.

AFTER THE EVENT

Once the event is over, your notes will still be available view the app. When you're back in the office, you can log into the app and put your action plan together. Your notes are also saved to the Attendee list as a Custom Field, so anyone with access to the Attend Dashboard can also export a spreadsheet and send the list with Notes out to your team. Happy selling!

FAQS

Q: What versions of Apple iOS does the Attend Mobile app support?

A: iOS version 8.0 and above are currently supported for use of the Attend Mobile app for iPhone and iPad.

Q: Is the same functionality supported on the iPhone and iPad versions of the Attend Mobile app?

A: The app is engineered to deliver an identical experience whether you're using the iPhone or iPad. The only exception is that Kiosk Mode for self check-in is only supported on the iPad.