Myshowguide.com
Administration Guide

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Introduction

Myshowguide.com is a web-hosted application that manages exhibitor information for tradeshow exhibitor guides. The system provides a simple, best-practice method for capturing, managing and exporting exhibitor information. The information may be exported for web publishing or printing in a Show Guide.

This Administration Guide explains how to:

- setup your event in the Myshowguide.com system;
- import a list of exhibitors;
- start sending them reminder emails;
- edit and modify the data collected;
- export the data

This Guide also explains the overall process that Myshowguide.com uses, and how you can adapt it for your specific show guide production needs. For example:

- Will you use an artificially early “cutoff” date to get your exhibitors to respond quickly?
- Will you be capturing a directory of your exhibitor’s new products for a special section in the show guide?
- Will you be categorizing your exhibitors for a special section in the show guide?
- Do you want to ask your exhibitors any other unique questions?
- Do you want to do a post-event survey to ask your exhibitors for testimonials?
- Do you want to send a marketing message to all exhibitors, promoting ancillary sponsorships and opportunities?

Myshowguide.com can handle all of these variations, and more!

Who Is This Guide For?
This Administration Guide is written for the person at a tradeshow production company that is responsible for gathering all exhibitor information for publication in the official event show guide. This user will administrate all aspects of the Myshowguide.com service using a secure login and password.

If you purchased the Managed Event service, then a Myshowguide.com technician will be handling most of these details for you. Reading through this Guide will help you understand the process, which will be helpful in answering some of the questions we will ask during the setup process.

Using its powerful and flexible surveying tools, and automated email messaging tool, Myshowguide.com can handle almost every unique scenario that your show guide might require. And if it doesn’t, send us a request! We are regularly adding new features.

Sincerely,

The Myshowguide.com team
info@myshowguide.com

Overview Of The Myshowguide.com Process

Myshowguide.com (MSG) takes over the process of asking your exhibitors to submit their information for publication in the official event show guide. It also gives you the power to do a few more things that are often overlooked (follow up surveys, marketing emails, etc.). This process has been honed by some of the world's best tradeshow producers…and automated by Myshowguide.com.

For each brief description in this overview section, you MUST read the full explanation of the feature shown later in this Guide. The information described below is NOT enough to properly setup your event.

Login To Administration Console
After your MSG order has been processed, you will have a username and password. Login to the Administration console from the Client Login link located at the top of http://myshowguide.com. After logging in, the system will display the main Exhibitor page for your event--however at this point no exhibitors have been entered. Click on the Event tab, and begin the process of setting up your event. This involves entering a variety of parameters that define your event, all of which are explained later in this Guide. The information you enter can always be edited later, so when you setup the first time, don't worry if something isn't entirely clear.

Setup Your Event
You'll need to decide on things like: cutoff and close dates, welcome and confirmation messages, email messages and schedules, and exhibitor categories and questions.

When you first view the Event Information page, you will see that some fields and product categories have been setup with sample information. This information is suggested as a starting point, and is intended for you to modify or change as needed. The sample information is helpful for new users to understand how the fields can be used, and how they display on the submission form. These messages have been tested and work very well--with some minor editing you may find they will work for your event.

Additionally, the Event section is where you can define Product Categories and Sub-Categories, and unique questions to ask your exhibitors. The surveying tool permits you to define multiple question types (multiple choice, short answer, long answer), which allows you to ask your exhibitors different things, such as: new product name, new product description, embargo dates, permission to publicize their new products, demographic questions, testimonials, etc.

Import Exhibitors
Next you'll want to import a CSV file of all companies that are currently exhibiting. Alternatively, you can enter exhibitors manually one at a time. You do this from the Exhibitors→Import/Export page. We suggest you enter a test exhibitor for yourself (using your own email address). This will allow you to receive copies of all email reminders, and experiment without sending anything to a real exhibitor.

Once you've imported or created a new exhibitor, click on the "link" to see what the submission form looks like. This form will change as you change product categories and questions.

Create Email Messages and Broadcast Schedules
Next go to the Messages section, and create a series of scheduled email messages (for automatic broadcast to those exhibitors who have not responded). Make sure you use a Broadcast Date that is in the future; if you use today's date, the messages will be sent today!

The body of these messages must include the [updatelink] snippet, which is a system-generated link. When an exhibitor sees this link in the email, it is a URL they can click on to go to their web update form. This is how they will submit their information into the MSG system. You will also need to create at least one “Saved” type message. The Saved Message types are used to manually send the first email reminder to new exhibitors that are added later. This is useful so that exhibitors get at least one soft reminder message. If you don’t send them a friendly reminder first, the first message they get might be a very urgent reminder as part of the automated campaign.

Import/Export Exhibitor Information

From the Exhibitor→Import/Export page you can export almost any selection of exhibitors (All, Those who have responded, Those who have not responded, Locked, Unlocked, etc.). Who you choose to export will depend on your cutoff date strategy.

There is a detailed description in this Guide of various cutoff date strategies, and how each strategy affects your use of the Lock and Export commands. Read more on this subject in the section “Using an Early Cutoff Date To Improve Response.”

Logging In And Navigating

To login to the MSG Administration console, you must first purchase the service for a "Single 6 month Event". During the ordering process you will setup a username (email address) and password.

After ordering the service and successfully creating your account, go to the Client Login page (from the myshowguide.com home page, click on the Client Login tab at the top right). Enter your username and password to enter the MSG event Administration console for your event (Figure 1).

In Figure 1 you will see the three main section tabs (Exhibitors **|** Messages **|** Events) of the Administration console. The default console page is the list of exhibitors for your event, and it will be empty at first. Clicking on a section tab will display a corresponding section main page, along with subordinate tabs that are different for each section.

The convention used in this Guide for describing how to get to a particular page is:

Section Name→section tab

For example, Event→Exhibitor Questions refers to the Event section, Exhibitor Questions tab.

Event Setup

To setup your event you'll need to decide on things like: cutoff and close dates, welcome and confirmation messages, email messages and schedules, and exhibitor categories and questions.

Review the Sample Data (Figure 2)
In the Events→Event Information page, you will see that some fields and categories have been setup with sample information. This information is suggested as a starting point, and is intended for you to modify or change as needed. The sample information is helpful for new users to understand how the fields can be used, and how they display on the submission form. Also, the sample Welcome, Thank You and email messages have all been tested and work very well--with some minor editing you may find they will work for your event.

Entering Data in the Event Setup Fields (Figure 2)
You must define the basic event parameters that the system will use for your event. Read each section below to answer any questions you have about how the fields are used by the system, and how you should define them for your event.

Event Name and Event Date
Type the official show name, and first day of the event into these fields. These fields are not used by the system for calculations; they are for display purposes only.

Upload the Event Logo (Figure 2)
The event logo is used on the submission form that the exhibitor sees. It is not required, but it is recommended to customize the submission form for your event. Click the Choose button, browse your local drive, and locate a .gif file of your event logo. The graphic should be no more than 250 pixels wide. Then click the Upload button, and the logo will be saved to your account. The logo must be in .gif format (no other file formats are currently supported.

The Cutoff Date (Figure 2)
The Cutoff Date that is entered on the Event Information page is the exact date and time that the submission form will change over to capturing information for the Addendum. The value of the Cutoff Date field is in the format:

1/5/10 8:00PM

This means January 5, 2010 at 8:00PM eastern time. The MSG server uses a clock in the Eastern Time zone. Note that any Exhibitor Question that is set to "Hide After The Cutoff Date" will no longer appear on the submission form. Also, the word limit for the company description field will revert to the After Cutoff Date value.

Using the Cutoff Date presumes that you will be publishing an Addendum of some kind, where last minute exhibitors or late submissions will be printed. If you won't be printing an Addendum, then leave the Cutoff Date blank, and the Close Date will be used by the system as the last date that any exhibitor can submit their information. The Cutoff Date is the last date by which an exhibitor can submit a "full" listing into the printed show guide. You choose this date according to the production schedule of your show guide. Exhibitors that submit their info before this date will be able to use the longer company description field (default is 50 words), and will also be able to answer any Exhibitor Questions that you might define. Exhibitors that submit after the Cutoff Date will be published in the Addendum, will use the shorter company description field (usually 25 words), and will not be able to answer any questions that are set to "Hide After The Cutoff Date". After the Cutoff Date, the submission form is automatically shortened to eliminate the fields that won't be used in the Addendum. To see the difference, try changing the Cutoff Date to the past, and click on an exhibitor update link to view the form.

The Close Date (Figure 2)
All exhibitor submissions will be closed as of the Close Date, effectively ending the information capture process. The Close Date is normally determined by the production schedule of the Addendum.

Enter an Email Address in the From: Field (Figure 2)
This field is used by the system when sending email messages to your exhibitors. The value of this field will appear in the “From:” field for each message the system sends. If your exhibitors have questions about the submission process, when they hit “reply” to an MSG email, it will be sent to this address. If you don’t want to use an actual email address, then setup an alias to an account and use that. Whatever you put in this field, it should go to a real person.

Word Limit for Company Descriptions
These two fields set the length of the Company Description field. The length is usually shorter after the Cutoff Date, because space is limited in the addendum. Many show guides permit 50 words, and addendums permit 25 words.

Enter a Message in the Welcome Message Text Field (Figure 2)
This message greets the exhibitor at the top of their submission form. The message must explain what you are asking the exhibitor to do (such as click on the update link, and respond by the cutoff date, or else they won’t get in the show guide). The system populated this field with a sample message, similar to the below text. Note that you must edit the Welcome Message after the Cutoff Date if an Addendum will be published. After the Cutoff Date, it should be changed to explain that they missed the deadline, and they must now submit their information by the Addendum deadline (which is the Close Date in the MSG system).

> Sample Welcome Message (pre-Cutoff Date)
> ---------------------------------------
> **Dear [event name] exhibitor:**
>
> Please follow the instructions on the right side of this page to successfully submit your company description and listing information for the show.
>
> This information will be posted both on the [event name] Web site and the Event Guide.
>
> You will have the opportunity to edit your information up to the cutoff date, ______, by linking to this private URL for your company:
>
> [updatelink]
>
> **Important Note:** after entering your data, you MUST click on the “Save” button at the bottom of the form, and you MUST then get the “Thank You” confirmation page. If you don’t receive the confirmation page, then your information was not successfully saved. This is usually due to some missing data, which will be highlighted in red above the problem field.
>
> By submitting your exhibitor listing information, you will now stop the regular email reminders that we are sending you!
>
> Thank you for taking care of this detail, and ensuring that your exhibit presence at the show is properly described in the official Event Guide and Web site.
>
> If you have questions about this site, or problems with your submission,
> please email [insert email address].
> ---

Using Product Categories (Figure 3)
Product Categories are optional. They are used in cases where the show guide will contain a directory listing of exhibitors sorted by category. Creating Product Categories and Sub-Categories is done from the Events→Event Information page. A few sample categories have been defined; you may either delete these or edit them for your event.

To create new categories, first type in the name of a category, then click the Add Category button. Then do the same in the Product Sub-Category section, also choosing a Product Category under which you want to create the Sub-Category. Usually, a few main Product Categories are created, and numerous Product Sub-categories are created under each. Is there a minimum/maximum limit for these, or is it hard coded in the system?

An alphabetized directory of all exhibitors, sorted by category, can be exported at any time from the Exhibitors→Import/Export page. This text file will include all exhibitors and their booth numbers, sorted by category. See the topic: “Import/Export Exhibitors”

Exhibitor Questions (Figure 4)
The Events→Exhibitor Questions page permits you to define multiple questions of different types (multiple choice, short answer, long answer). This allows you to add questions to the submission form, asking your exhibitors things such as: new product name, new product description, embargo dates, permission to publicize their new products, demographic questions, testimonials, etc. A few sample questions have been defined, which you can modify or delete.

The order of the questions can be changed by using the up and down arrows above each question. The order that the questions appear here is the same order they will appear on the submission form.

You may use this feature to ask your exhibitors a few questions about their participation in the event. Some of this information may be published in the show guide (such as what new products they are announcing at the show), other data may be used for internal purposes only (such as demographic responses, embargo dates, etc.). Below are some examples that past users have found useful for new products, marketing, audience alignment, etc.:

Question: What are the attendee job functions your company would like to see at [event name]?
Question: What are the attendee job titles your company would like to see at [event name]?
Question: Please enter the name of a new product that you will be showing at [event name]:
Question: Please enter a 50 word description of the new product:
Question: Please indicate Yes or No if you grant permission for the new product listed above to be promoted as part of our pre-event press release to the media.

Create a New Question (Figure 4 and 5)
To create a new question, go to Events→Exhibitor Questions, and scroll to the bottom of the page. From the drop-down menu, choose a question type, and click Add Question. This will take you to the Edit Question sub-page, and you can define the question prompt and other attributes. Click the Add Question button at the bottom to finish saving the question.

Import Exhibitors (Figure 6)
Next, you can either import a CSV file of exhibitors, or you can enter exhibitors manually one at a time. In either case, the minimum information you need for each exhibitor is:

Contact Email
First Name
Last Name
Company
Booth Number
Phone

To import a batch of exhibitors, you first need to put the list of exhibitors into Excel, and then save the Excel file in the CSV (Comma Separated Value) format using the Save As command from Excel’s File menu. In Excel, the order of the fields is not important, however the <u>first line</u> of the file must contain these exact headings:

Contact Email, First Name, Last Name, Company, Booth Number, Phone

When your CSV file is ready to import, go to the Exhibitors→Import/Export page (Figure 6), click the Choose File button, and browse your local drive to locate the CSV file. Click the Preview button, and make sure that the fields are mapping correctly. If everything is correct, then click Import to upload the CSV the file into the system.

Add Exhibitors Manually (Figure 7)
We first suggest you enter a test exhibitor record for yourself (using your own email address). This will allow you to receive copies of all email reminders, and experiment without sending anything to a real exhibitor.

You can create a new exhibitor manually from the List of Exhibitors page (Figure 7). Click “New Exhibitor, and enter all of the required fields (bold fields).

Once you’ve imported or created a new exhibitor, click on the “link” (from the List of Exhibitors page) to see what their unique submission form looks like. Each exhibitor “link” is a complex, system-generated URL that is unique to your event and that exhibitor. Note that the submission form for each exhibitor will change as you change product categories and questions.

Scheduling and Sending Reminder Messages

Email Messaging Overview (Figure 8)
The email messaging module (Messages page), is central to the MSG information capture process. This module permits the creation and automatic scheduling (by date and exact broadcast time) of a complete email reminder campaign. All email messages can be written and scheduled in advance for unattended operation. The MSG system will automatically send each exhibitor a unique email (with their unique updatelink URL), according to its scheduled Broadcast Date and time. When defining a new email message, you can choose to send it to every exhibitor (such as a marketing message), or most importantly, to only those exhibitors who have not responded.

Message Types
There are three message types that you can create and use:
1) Message sent to ALL exhibitors (e.g., a sales or marketing message)
2) Message sent to ONLY those exhibitors who have NOT yet submitted their information (e.g., a reminder message)
3) Saved message (used for sending a manual email to individual exhibitors).

Note: The "All Exhibitors" and "Exhibitors who have not yet responded" message types may be scheduled in advance and sent automatically to all qualifying exhibitors. The Saved Message type cannot be scheduled for a future broadcast date; this message type is only used for manually sending one email at a time to exhibitors.

Create A New Message
To create a new message, go to Messages tab, and click New Message. From the Add Message sub-page (Figure 9), choose the Message Type from the drop down menu, and specify the Subject, Broadcast Date and time, CC: address, Message Format, and then click Save Message.

Enter Subject, Broadcast Date, CC: (Figure 9)
Enter a subject, exactly as you want it to appear to your exhibitors.

In the Broadcast Date field, enter the date and time you want it to be sent, in the format:
1/5/10 3:00pm
This represents January 5, 2010 at 3:00pm eastern time. The MSG server uses a clock in the Eastern Time zone.

All transmitted email messages will be cc:'d to the email address entered in the CC: field. We recommend that you enter an email address here (it can be the same address used in the From: field under Event Information). This will send a copy of every message to a designated person in your organization, who will then have a record of what was sent and when. This is useful when you need to confirm that a particular exhibitor was sent a message. You may want to setup a filter on your email client to process these emails into a special folder. The volume of messages your receive will depend on how many exhibitors you have, and how often you remind them.

Message Formats (HTML and Text)
You have the option of sending an email in either HTML format or plain text. Sending HTML email messages allows you to format the text using the wysiwig (what you see is what you get) toolbar. Note: this toolbar is not supported on the Macintosh, you must use a PC running Windows to use the wysiwig editor. The wysiwig editor allows you to format words using commands for bold, italic, underline, etc. Text messages do not permit any formatting. We recommend using the HTML format for most messages, but sending an occasional text message to circumvent any spam filters that are set to catch HTML messages. Also, some email clients are not configured to view HTML messages, so sending a couple of text emails as part of your campaign is a good idea.

Using The WYSIWIG Editor (Figure 9)
First, make sure you are using a PC running Windows XP or 2000 (Macintosh is not supported for wysiwig editing). Then make sure you are editing the message in HTML mode (not Text mode), by clicking the appropriate button next to "Message Format." Then simply type some text in the message field, select some of the text, and click on a formatting button, just like Microsoft Word. The wysiwig editor will apply the style (bold, italic, etc.) to the text.

Insert The "updatelink" Field Into A Message (Figure 10)
In the body of the email, place the cursor where you would like to insert the [updatelink], and click on the formatting button that is on the far right side of the toolbar. If you mouse over this icon, it will say "Insert Some Text". By inserting the [updatelink] field in an email message, it will appear to the recipient as a URL that is clickable. The URL goes to a unique web page for that exhibitor to update their information. When email is broadcast by the MSG system to each exhibitor, the contents of the [updatelink] field is replaced by a unique URL for each exhibitor. This gives each email a unique URL for each exhibitor.

How To Clone A Prior Message (Figure 11)
To copy a previously scheduled message (it must have already been sent), click on the edit message icon, change the message as you wish, and click "save as new". IMPORTANT! Make sure you change the Broadcast Date field to a future date. If you leave the original message date in the Broadcast Date field, the message will be sent immediately after you save it.

Send Email Message Manually (Figure 15)
This function is often used to send a first reminder message to a new exhibitor that was just added.

To send an email to a single exhibitor (manually), you must have first created at least one message of the "Saved Message" type. See the topic: Message Types in this section.

To send a manual email, go to the List of Exhibitors, select an exhibitor, and click edit. Then select the Send Message tab. You will see a list of available Saved Messages to choose from. Select a message, and either send a preview to yourself as a test, or click Send to transmit the message immediately to the exhibitor.

Create A Schedule For Reminding Exhibitors
We recommend reminding exhibitors once a week until the last two weeks before the Cutoff Date, then either 2x/week or 3x/week maximum. Start sending reminders at least one month before the Cutoff Date (or Close Date, if you aren't doing an Addendum). As you add new exhibitors into the system, send them a Saved Message immediately (you can manually send an individual email from the Edit Exhibitor-->Send Message tab). Use a Saved Message that has a less urgent message, and send that to every exhibitor first. Then, after they get the manual email, the system will start sending them automatic messages according to the schedule you've defined.

Guidelines For Creating A Good Email Campaign
Here are some tips for effective email message creation:

-Avoid all caps in the subject line to avoid spam filters

- Mix in an occasional text message (not HTML format) to make sure the text only email clients are reading the message.

-A broadcast time of 11:00am (the Myshowguide.com system uses an eastern time zone clock) means the emails will hit west coast inboxes at 8am, which is better than overnight broadcast times. Ideally, this will help the message appear at the top of the inbox, ahead of the overnight spam. There is always a compromise between the time zones.

-Email accuracy is VERY important. If you don't have the correct email address for an exhibitor, they will not get any reminders. Some event producers send an email request to each exhibitor (in advance of using myshowguide), requesting that they add the reply-to address to their spam filter's allowed list.

-The Broadcast Date and time is very literal. If you go into an old message and click "save as new" and forget to change the Broadcast Date from the past, then the message will be transmitted immediately. Carefully check the message date before saving a new message to make sure it is in the future!

-The Myshowguide.com system does not maintain a database of undeliverable or bounced messages, so it is important that you verify the accuracy of every email address you enter for each exhibitor. There is no way to guarantee or confirm that a message was delivered.

Using an Early Cutoff Date To Improve Response

An artificially early cutoff date will definitely improve response. Human nature is to procrastinate, so imposing a “fake” cutoff date that is earlier than necessary will motivate exhibitors to submit their information on time. Soon after they buy exhibit space, start sending them email reminders. Also, because the MSG system will stop sending them reminders as soon as they submit their information, they won’t even know that the deadline was not real, or that it was “extended”. They won’t get the next campaign of messages that tells everyone else that the deadline was extended.

How To Implement An Early Cutoff Date Strategy
We recommend using an artificial cutoff date, which can be done using the following method:

a) pick an artificial cutoff date that is 2-3 weeks before your real Cutoff Date
b) schedule a series of email messages leading up to that date
c) refer to the artificial cutoff date in all these email messages
d) on the artificial cutoff date, go into the Manage Data tab and Lock all completed exhibitors (this will prevent them from editing their information).
e) now start another schedule of email reminders using the real Cutoff Date, following the above process, but referring to the real Cutoff Date in all messages
f) on the real Cutoff Date, Lock all completed exhibitors, then Export all exhibitors.
g) now begin a third email reminder campaign to get everyone who did not make it into the show guide, into the Addendum.

Exporting Exhibitor Data (Figure 12 and 13)
If you want to take a look at the data submitted by the early cutoff date, you can export only those exhibitors who have submitted their information. On the Exhibitors→Import/Export Data page, select the data set you want to export from the drop-down menu, and click the Export button (Figure 12). The system will ask you to specify a name and location for the saved file. This will take from 10 to 60 seconds depending on the number of exhibitors. The exported file will contain all exhibitor information (for the selected set) in a CSV file.

You can also export the category information for the exhibitors at any time (Figure 13). Exporting the Category information is a separate function from exporting the exhibitor information. On the Import/Export page, click the Export button under Export Categories. This will take from 10 to 30 seconds to process, and will then display in a browser window the text of all product categories/sub-categories and exhibitors, sorted alphabetically, and including booth number. The company name and booth number are separated by several spaces, so you can globally replace the spaces with a tab character for easy formatting.

Using the Lock Function At The Early Cutoff
It is important to Lock exhibitors from future editing of their information, particularly if you plan on exporting and publishing the information that was submitted by the early cutoff date. If you don’t lock these exhibitors from editing, then they may make further changes to their information, and assume that you will re-export their data for the final show guide export. Depending on your production process, you may or may not choose to re-export their information.

On the Exhibitors→Lock/Unlock page (Figure 14), you can globally Lock exhibitors who have submitted their information (select “completed exhibitors” and click the Lock button). Click Lock again when it asks to confirm this choice, and all selected exhibitors will be locked from further editing.

Note: On any individual Edit Exhibitor page, you can manually lock or unlock individual exhibitors using the Lock icon in the upper right corner of the Exhibitor Information tab.

Entering Changes For An Exhibitor Whose Record Is Locked
Be careful about doing this! If an exhibitor record is locked, it usually means it has been exported

(and possibly formatted in the show guide). If an exhibitor requests a change to their information after it has been locked, be sure you know where the information has been used, and change it in all places (show guide, web site, etc.).

Exhibitor Information

List of Exhibitors
This is the default page when you log in to the system. To view this list from any other page, click on the List of Exhibitors tab. This page shows all exhibitors that are part of the event, including exhibitors that have been added manually or imported from a CSV file.

New Exhibitor
From the List of Exhibitors page, click on the “New Exhibitor” button in the top left. On the Add Exhibitor page, enter all of the required fields (bold fields).

Link
From the List of Exhibitors page, click on any exhibitor’s “Link” to view their unique update page. This is the same page that they will use to submit or edit their information. If the exhibitor record is locked, you will see a notification that this record has been locked from editing. You must unlock the exhibitor record to view this page, which can be done manually from the Edit Exhibitor page for that exhibitor. Note: any changes you make to the exhibitor information via this form will be saved, if you press the Save button at the bottom of the form. Note that any information the exhibitor has already entered can be viewed here.

View
The View drop-down menu is a filter for viewing different sets of exhibitors. You may choose View: All, Complete, Incomplete, Complete Unlocked, Unlocked, and Locked records.

Edit Exhibitor
The Edit Exhibitor page (click the Edit icon to the left of any exhibitor on the List of Exhibitors page) permits editing of the exhibitor’s information, even if it is a locked record. This permits you to modify the information while it remains locked from future submissions by the exhibitor. The tabs along the top organize the information as follows: Category Responses, Question Responses, Send Message.

Published Information vs. Contact Information (Figure 16)
On the Edit Exhibitor page, the Contact Information (in the green section) is not intended to be published in the show guide; it is private data that is used for sending the email reminders and contacting the exhibitor by phone. The Published Information fields are intended to be used in the printed show guide, or exported to the event web site for publication online. However, depending on what information the event captures (such as new products, categories, demographic questions, etc.), this information may or may not be published. For example, you would not normally publish exhibitor responses to demographic questions.

Send Message (Figure 15)
This function is often used to send a first reminder message to new exhibitors that were just added to the system. To send an email to a single exhibitor (manually), you must have first created at least one message of the “Saved Message” type. For more on Saved Message types, see the topic: Message Types in the section Scheduling and Sending Reminder Messages.

To send a manual email, go to the List of Exhibitors, select an exhibitor, and click edit. Then select the Send Message tab. You will see a list of available Saved Messages to choose from. Select a message, and either send a preview to yourself as a test, or click Send to transmit the message immediately to the exhibitor.

We suggest that after adding a new exhibitor manually, you immediately send the exhibitor an email asking them to submit their information for the show guide. Then, if they do not respond, they will automatically start to receive any scheduled email reminders that are defined to go to “exhibitors who have not yet responded”.

Import/Export Exhibitors

Import Exhibitors (Figure 6)
Go to the Exhibitors→Import/Export page to import a CSV file of exhibitors. Before you import, you will need to prepare an Excel file and export it to the CSV (Comma Separated Value) file format. The minimum information you will need for each exhibitor record in this file is:

Contact Email
First Name
Last Name
Company
Booth Number
Phone

First, put the list of exhibitors into Excel, in the format described below. Then save the Excel file in the CSV (Comma Separated Value) format using the Save As command from Excel's File menu.

In Excel, the order of the fields is not important, however the first line of the file must contain these exact headings:

Contact Email, First Name, Last Name, Company, Booth Number, Phone

When you have the CSV file ready to go, go to the Exhibitors→Import/Export page (Figure 6), click the Choose File button, and browse your local drive to locate the CSV file. Click the Preview button, and make sure that the fields are mapping correctly. If everything is correct, then click Import to upload the CSV the file into the system.

Exporting Exhibitor Data (Figure 12 and 13)
On the Exhibitors→Import/Export Data page, select the data set you want to export from the drop-down menu, and click the Export button (Figure 12). The system will ask you to specify a name and location for the saved file. This will take from 10 to 60 seconds depending on the number of exhibitors. The exported file will contain all exhibitor information (for the selected set) in a CSV file. This CSV file may then be manipulated into whatever format your production department or webmaster needs.

Exporting Category Information (Figure 13)
You can export the category information for exhibitors at any time (Figure 13). Exporting the Category information is a separate function from exporting the exhibitor information. On the Import/Export page, click the Export button under Export Categories. This will take from 10 to 30 seconds to process, and will then display in a browser window the text of all product categories/sub-categories and exhibitors, sorted alphabetically, and including booth number. The company name and booth number are separated by several spaces, so you can globally replace the spaces with a tab character for easy formatting.

Lock/Unlock Exhibitors

Globally Lock or Unlock
The concept of locking exhibitor records from further editing is distinct from the Close Date and the end of the submission process. After the Close Date, all exhibitors are prevented from submitting or editing, and no new exhibitors or emails may be added to the system. The event is officially closed from the MSG perspective.

However, before the Close Date, and while the MSG system is still collecting data (new exhibitors being added, submissions being made, records being edited), there may be times when certain exhibitor records must be locked from further editing. This is a revision-control issue. For example, if you get 100 exhibitors to submit their information by June 1, but you really have until July 1 before you need to give the data to the production department for the show guide, you may decide to lock those 100 exhibitor records. Doing so will allow you to export their information on June 1, lock them from editing, and hand their data off to the production department. This allows production to begin working on a large chunk of the show guide, and you can be sure that none of them will submit any changes (which they can do until their record is locked). In this way, you won't have to re-export the first 100 exhibitor records, and reformat their information in the show guide. Or worse, try to merge any changes that were made after you exported them.

On the Exhibitors→Lock/Unlock page (Figure 14), you can globally Lock exhibitors who have submitted their information (select "completed exhibitors" and click the Lock button). Click Lock again when it asks to confirm this choice, and all selected exhibitors will be locked from further editing.

You can also choose to Globally Lock or Unlock incomplete exhibitors. Use this function carefully!

Manually Lock/Unlock
You can manually lock or unlock individual exhibitors. From the List of Exhibitors, choose an exhibitor, click its Edit icon, and then click the Lock/Unlock icon in the upper right corner of the page.