B2GNOW Software for Government Staff User Manual

Chapter 5 – Outreach









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Chapter 5 – Outreach

Communications between the organization and its vendors is critical to the success of your program. The Outreach module includes multiple components to support the creation of content, publication and management of events, and tracking of notice distribution and event attendance. Components include:

- Outreach Management rapid distribution of information to many contacts
- Vendor List creation and management of vendor lists for specific activities
- Event Management hosting of onsite or online events and attendee registration

The Power of Outreach Management

Your organization is having an event to target a specific group of vendors, such as certified WBEs or DBEs in your area. How do you get the message to them? How do you compose your mailing list? How many hours do you take to compose, create a mail merge, print, collate, stuff envelopes, and mail your announcement?

With the Outreach Module, you can create an Outreach Campaign in minutes, drastically cutting the time required to manage the process.

Examples	Features
 Seminars Bid solicitations Classes/training sessions Conferences General announcements Open houses Certification outreach Announcement regarding a contract News and updates 	 Comprehensive vendor search Control visible information Send reminders Post notice to Bulletin Board Revise and add to a notice instantly No mail merge, printing, or postage Easily add/edit vendors on the list

Creating and editing outreach campaigns

The Outreach module lets you easily communicate with your vendors. You specify all the details for your campaign, such as the campaign message, the frequency with which your vendors receive campaign notifications, and the vendors to which you want to send the campaign notifications.

Creating outreach campaigns

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To begin creating the campaign, you specify basic information, such as the campaign title and who can view and edit it. However, the campaign is incomplete until you edit the campaign settings.

To create an outreach campaign

- 1. From the navigation menu, click **Create**.
- 2. Click New Outreach.
- 3. In the Outreach Campaign Parameters box, select your options.

Outreach: Start

Help & Tools 💥

Outreach Campaign Parameters				
Outreach Campaign Title *	Test Project - DBE Seminar			
Outreach Control *	 Outreach campaign can be viewed and edited by anyone in your organization. Outreach campaign can be viewed by anyone BUT edited only by a designated user (cur you) or an administrator. 			
Outreach Publicity *	 The outreach campaign can be viewed ONLY by selected vendors. Viewable by all system vendors PLUS posted on the Public Outreach Bulletin Board for viewing by the public. Posted only on the Public Outreach Bulletin Board for viewing by the public. 			

Once all parts of the outreach campaign have been completed, you must **Release** the outreach campaign to trigger the send out of notifications and posting on the bulletin board, if applicable.

A copy of the outreach notice will be sent to you whenever notices go out.

Create Outreach Campaign Cancel

4. Click Create Outreach Campaign.

NOTE: Some options may be different based on your organization's configuration.

Editing outreach campaigns

Once you create the campaign and specify the basic information, the Outreach Management page displays. Red text indicates an action needs to be taken. You can specify information such as assigning outreach ownership, notification methods, and delivery dates. Use the hyperlinks and tabs to access the areas for which you need to complete campaign information.

Main Settings Content Vendor List						
Test Project - DBE Seminar	Outreach incomplete	Posting Date: Not s				
		<u>Refresh Pa</u>				
Outreach Campaign Info	rmation	(
Outreach Campaign Title	Test Project - DBE Seminar					
Status	Outreach incomplete	Putreach incomplete				
System Transaction Number	00701955-001	0701955-001				
Date Created	9/20/2012					
Outreach Alerts						
Alert 1	Outreach settings have not been completed (Complete settings)					
Alert 2	Outreach content has not been completed (Enter content)					
Alert 3	No vendors assigned to outreach (Get vendors)					
Outreach Campaign Mes	sage Settings					
Message Subject	Outreach settings have not been completed (Complete settings)					
From Name	Outreach settings have not been completed (Complete settings)	Outreach settings have not been completed (Complete settings)				
From Email	Outreach settings have not been completed (Complete settings)					
Reply-To Email	Outreach settings have not been completed (Complete settings)					
Outreach Status, Setting	s & Actions					
	Status	Actions				
Outreach Control	Outreach campaign can be edited by anyone in your organization.	Change				
Outreach Publicity	The outreach campaign can be viewed ONLY by selected vendors.	Change				
Other Settings	Not completed	Update				
Other Functions	Close Outreach, Delete Outreach, Copy Outreach					

Main tab. Displays the current status for each area of the campaign, and lets you quickly access sections.

Settings tab. Displays the current information associated with the campaign settings. Enter, edit, or select settings for the campaign information; the campaign message, such as the message subject and the email address you want to use; the campaign settings, such as who can view the campaign information and how vendors will receive the message; and the dates on which the message and reminders, if any, will be sent.

Content tab. Lets you enter and edit the campaign content and view it as vendors will view it, as HTML formatted content or text content.

Vendor List tab. Lets you build and view your vendor list. You begin by entering the search parameters and then add vendors to your list.

To edit campaign settings

- 1. Go to the **Settings** tab.
- 2. In the Outreach Campaign Information area, edit or enter campaign details.

Outreach: Update Settings		Help & Tools 💥		
Main Settings Content Vendor List				
Test Project - DBE Seminar	Outreach incomplete	Posting Date: Not set		
* required entry				
Outreach Campaign Informa	ation	(?		
Outreach Campaign Title *	Test Project - DBE Seminar			
Comments		*		
		-		
	» Enter optional comments to describe the purpose of this outread	ch campaign. This information is		
	not displayed to vendors.			
Outroach Commeting Marco	0.44	(r		
Outreach Campaign Messa	ge Settings	(
Message Subject *	(<u>Copy Title</u>)			
From Name *	Houston Admin7 [City of Houston]			
From Email *				
Reply-To Email *				
Outreach Campaign Setting	S	(1		
Outreach Ownership *	Anyone in your organization 👻			
Outreach Publicity *	The outreach campaign can be viewed ONLY by selected vencome Viewable by all system vendors PLUS posted on the Public Output Comparison of the Public Outpu			
	itreach Bulletin Board for viewing			
	Posted only on the Public Outreach Bulletin Board for viewing I	by the public.		
Notification Types *	Notify vendors by BOTH email and fax.			
Notify vendors only by EMAIL. Assigned vendors without a valid email will not Notify vendors only by EAX. Assigned vendors without a valid for a very ber without a very ber without a very ber without a very ber without a valid for a very ber without a valid for a very ber without a very				
	Notify vendors only by FAX. Assigned vendors without a valid fax number will not be noti Do not notify vendors. Assigned vendors will view their notices only within the system o			
	Bulletin Board.			
Outreach Dates		6		
	Scheduled for:			
Notification & Posting Date *	This is also the date the outreach campaign is posted on the Outr	each Bulletin Board.		
First Reminder *	○ Active, scheduled for:			
	 Not active 			
Second Reminder *	C Active, scheduled for:			
	Not active			
Third Reminder *	○ Active, scheduled for:			
	Not active			
Deactivation Date *				
	Date outreach campaign will be taken off the Outreach Bulletin Board.			

3. In the **Outreach Campaign Message Settings** area, enter or edit the subject and email details.

NOTE: The message title is the email subject the recipient sees. The outreach title is the label displayed to the user when searching for campaigns.

4. In the **Outreach Campaign Settings** area, specify your options.

Outreach Ownership. The campaign owner.

Outreach Publicity. Viewing options for vendors.

Notification Types. The way in which you want vendors to receive notifications. Email sends the notice to the recipient email address, as listed in the system. Fax sends the notice to the vendor's fax number, as listed in the system. Bulletin Board lets vendors view the notification when they are logged in to the system.

- **NOTE:** Fax notices require the activation of the fax service. The Bulletin Board option can be limited to only firms on your project or open to any vendor in the system to view. Your agency may also have a public Bulletin Board for anyone to view the outreach campaign without logging in.
 - 5. In the **Outreach Dates** area, schedule the dates and times on which to send the notification and each reminder, if any. You can send up to three reminders. Each reminder contains the same content as the original message.
 - 6. Click **Save**, and then click **OK**.

To enter campaign content

- 1. Go to the **Content** tab.
- 2. Click the Edit button.

Outreach: View Content Main Settings Content Vendor List		Help & Tools 💥
Test 4	Outreach incomplete	Posting Date: Not set
	Edit View Text Version	
Outreach Campaign Content		?
Content has not been entered. Click Edit butto	n.	



3. In the **Outreach Campaign Content** area, enter the notification content or paste content from an external editor, such as Microsoft Word. For suggestions on composing messages, see **Composing your message** later in this chapter.



TIP: To maximize the size of the edit box, click the Maximize the Edit Size icon in the top line of the editor menu.



4. To insert an image, first access the webpage that contains the image. The image must be publicly accessible on the Internet.



5. Right click on the image and select **Copy** if using Internet Explorer. The copy option may be labeled differently in other browsers.



- 6. Return to the edit box in the system and click where the image is to be inserted.
- 7. Right click and select Paste.

Outreach Campaign Content	?
□ □	
Disadvanta Southess Seminar Announcement (09/10/212) The Disad Paster kiness Enterprise Council's first Distinguished Lecturer for the 2012-2013 series will present a seminar on: Wednesday, October 15, 2012 in the Convention Center at 2pm, to be followed by a reception in the courtyard:	
Guest Speaker	
Mary Wollstone Council President, CEO of SBE, Inc.	

8. Click Allow access on any popup warnings.





9. The image will appear.



To attach files, click the Attach Files button. A popup window will display.
 In the Select File area, click the Browse button and locate and select the file.

Attach Files	°.
	se a file from your computer, then click Attach File to upload. You may and the maximum permissable size is 25.0 MB (megabytes)
Select File *	Browse
File Title	
File Description	A
	-
	Spell Check Attach File

12. In the File Title and File Description fields, enter the title and description of the file.

13. Click Attach File.

To include an additional file, click **Attach Another File** and repeat the process. You can attach as many files as needed.

The following file was successfully uploaded. Click Return to List to upload more files or manage the uploaded files.			
File Title	Summary_info.txt		
Filename	Summary_info.txt		
File Size	N/A		
File Description	N/A		

- 14. To close the window, click **Close Window**.
- 15. Click Save & Return.

An HTML formatted preview of your message displays on the page. From here, you can edit the content or view the text version.





To add vendors

- 1. Go to the **Vendor List** tab.
- 2. Click Add Vendors.

Outreach: Vendor List					Help	& Tools 💥
Main Settings Content Vendor List						
Test 4	Outreach incomp	lete			Posti	ng Date: Not set
To resort click on column title.	Add Vendors				<u>Refresh Ta</u>	ble <u>Clear Filters</u>
▲ <u>Vendor</u> ▲	Contact	Email	Fax	Notice	Comment	Delete
All 👻	All 👻	All 🔻	All 👻	All 👻		Delete
No vendors found » Add Vendors.						
0 - 0 of 0 records di	splayed: Previous Page < Page	▼ > N	ext Page		Records per	page 20 👻

3. To quickly view and add vendors of all certified or registered firms, click **Certified Directory** or **Registered Firms**.

Click a button to initiate an immediate search
Certified Directory Registered Firms

NOTE: Buttons displayed will be based on your organization's configuration

4. To search for vendors using general search fields, in the **Search Parameters** area, enter or select the fields by which you want to filter your search.

Search Parameters		(?
Business Name/DBA		
Contact Person	First	Last
City		
State/Province	U.S. States/Provinces	Canadian Provinces
Zip Code/Postal Code	U.S. Zip Code or	Canadian Postal Code
Phone Area Code		
NAICS Code		COBES -
Business Description		



5. To search for vendors with specific certification information, in the **Certification Parameters** area, enter or select the fields by which you want to filter your search.

Certification Parameters	(?
Certifications Select all Unselect all	Match ANY certification type selected below City of Houston Airport Concessionaire Disadvantaged Business Enterprise (ACDBE) Minority/Disadvantaged Business Enterprise (M/DBE) Small Business Enterprise (SBE) Women/Disadvantaged Business Enterprise (W/DBE) Women Business Enterprise (WBE) Disadvantaged Business Enterprise (DBE) Persons with Disabilities Business Enterprise (PDBE)
Certification Action	All actions 👻
Certification Status	Certified/Active Optional Process Step: All Optional Date Range: to impreciation (mm/dd/yyyy) Limit expiring/expired (w/out pending applic.) search filter to same certification type Use ORIGINAL renewal/expiration date for expiring/expired search filter
Assigned Certification Officer	None selected
Business Category	No category selected or No capability selected

6. To search for vendors of a specific ethnicity, gender, or status, or by a specific DUNS, FEIN/Tax ID, or system vendor number, in the **Advanced Search Parameters** area, enter or select the fields by which you want to filter your search.

Advanced Search Parameters		?
Ethnicity	All 🔹	
Gender	All 🗸	
Vendor Status	- Currently registered 🔹	
Site Visit	Select Option ▼ a site visit between and mm/dd/yyyy) for any purpose ▼.	
Local Business		
DUNS Number		
FEIN/Tax ID Number		
System Vendor Number		

7. To search for vendors by reference number or by site list or concessionaire status, in the **Additional Vendor Fields** area, enter or select the fields by which you want to filter your search.

Additional Vendor Fields		?
Vendor Reference Number		
Site Visit	None selected 🔻	
Concessionaire List	None selected 🔻	



8. Search for vendors by district or category, in the **Additional Certification Fields** area, enter or select the fields by which you want to filter your search.

Additional Certification	Fields	
Selection of any certification field	below requires certification type(s) to be selec	cted above.
Work Districts/Regions	Selection of any combination below district/region match.	v will find firms that have at least one assigned work
	Abiline	Laredo
	Amarillo	Lubbock
	Atlanta	Lufkin
	Austin	Odessa
	Beaumont	Paris
	Brownwood	Pharr
	🕅 Bryan	San Angelo
	Childress	San Antonio
	Corpus Christi	Tyler
	Dallas	Waco
	El Paso	Wichita Falls
	Fort Worth	Yoakum
	Houston	
Council District	None selected 👻	
Category	None selected	•

9. Click Search All Matches.

The search results display.

Search Again

10. Click the Add to Outreach button, and then click OK to verify.

Users Vendors Contracts Concessions	Outreach		
Listed below are all of the vendors that ma can view more listings by using the naviga o resort, click on column title.			is of the table to reduce the size of the list. Y
Business Name	Phone Number	Location	Actions
All 👻			
ASKREPLY, INC., DBA B2GNOW	602-325-9277	Phoenix, AZ	20021155 Edit QuickView Contracts Concessions Certs
B2Gnow Test 6	602-325-9277	Phoenix, AZ	20051275 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 10	602-325-9277	Phoenix, FL	20079187 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 11	602-325-9277	Phoenix, FL	20079197 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 2, DBA Cool Beans	555-555-5555	Orlando, FL	20033683 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 24	602-325-9277	Phoenix, AZ	20088859 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 3	602-325-9277	Phoenix, AZ	20049188 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 4	602-325-9277	Phoenix, AZ	20018259 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 6	123-123-1231	Phoenix, AZ	20050068 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 7	602-325-9277	Phoenix, AZ	20052159 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 8	222-222-2222	Phoenix, AZ	20050069 Edit QuickView Contracts Concessions Certs
32Gnow Test Vendor 9	602-325-9277	Phoenix, FL	20079186 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 99	480-325-9277	Phoenix, AZ	20072869 Edit QuickView Contracts Concessions Certs
32Gnow Training Vendor	602-325-9277	Phoenix, AK	20067789 Edit QuickView Contracts Concessions Certs
Sprinkles Car Wash, DBA B2Gnow Test Vendor	602-325-9288	Pasadena, CA	20128754 Edit QuickView Contracts Concessions Certs

Add New Vendor Add to Outreach Add to Vendor List Export

Message -- Select a vendor contact type -- - Contacts _____ Go

11. On the **Outreach Management: Add Vendors to Outreach Campaign** page, select the **Vendor Contact Type** and **Outreach Campaign**, and then enter a comment, if necessary, such as "Construction, DBE, Expired."

* required entry	
Parameters	
Vendor Count	15
Vendor Contact Type *	General 👻
Outreach Campaign *	Test4
Comment/Label	

- **NOTE:** Use a comment/label that describes the type of search you ran. This differentiates vendors added from multiple searches.
 - 12. Click **Add Vendors to Outreach** Campaign, and then click **OK** to verify you want to add the vendors to the selected outreach campaign.

The Outreach Management: Vendors Added to Outreach page displays.

13. To return to the campaign, click View Outreach Summary.

Outreach Manage	ment: Vendors Added to Outreach	i de la companya de l	Help & Tools 🛠
Main Settings Content	Vendor List		
Test 4	Outreach i	ncomplete	Posting Date: Not set
	View Outreach Summary View Outre	each Vendor List Add More Vendors	
	How can we improve this system? We continually try to provide you with the resources, tools, and features that let you efficiently manage your data. If you have a minute, please send us some feedback on the process you have just completed. We value your input and will respond to your suggestions.	Training Classes Learn how to use the system more efficiently by taking one of our online training classes. Select Training Classes from the Help & Support menu. If you ever need support, please dick the Customer Support link at the bottom of every page.	
	Submit Feedback		

You can repeat this process to search and add as many sets of vendors as you need. Although there is a per search limit of 5,000 matches, this limit does not apply to the number of firms you can add to your campaign.

The vendor list can be sorted and filtered.

To sort or filter the campaign vendor list

- 1. If necessary, go to the **Vendor List** tab for the campaign.
- 2. Click a column heard to sort, use a drop down menu to filter.

Outreach: Vendor List Main Settings Content Vendor List						Help	& Tools 💥
Test 4		Outreach incomp	olete			Posti	ng Date: Not set
	Add Vendors	Delete ALL	Assigned	Vendors	1	Pofrach Ta	ble Clear Filters
To resort click on column title.		Contact	Email	Fax	Notice	Comment	Delete
		All 👻	All 👻	All 👻	All -		Delete
ASKREPLY, INC.	Justin Talbo						
	Justin Tarbo	ot- Stern	\bigcirc	\bigcirc	-		
B2Gnow Test 6	Test Vendo		0	-	-		
B2Gnow Test 6 B2Gnow Test Vendor 10				-			

To delete a vendor

- 1. If necessary, go to the **Vendor List** tab for the campaign.
- 2. In the **Delete** column, select the check box for the vendor you want to delete.
- 3. Click the **Delete** button, and then click **OK** to verify you want to delete the vendor from the campaign.

To delete all vendors on the page

- 1. If necessary, go to the **Vendor List** tab for the campaign.
- 2. Select the check box to the left of the **Delete** button, and then click **Delete**.

Outreach: Vendor List				Help & Tools 🛠
Main Settings Content Vendor List				
MBE Outreach Q22013	Outreach inc	omplete		Posting Date: Not set
To resort click on column title.	dd Vendors Delete	e ALL Assigned Vend	ors	Refresh Table Clear Filter
▲ <u>Vendor</u> ▲	Contact	Email Fax	Notice	Comment Delete
All 👻	All 👻	All 👻 All 👻	All 👻	Delete
B2Gnow Test Vendor 10	<u>Test User</u>	 - 	-	
B2Gnow Test Vendor 11	Test User	-	-	
B2Gnow Test Vendor 2	Dawn Anderson	<i>•</i>		1

3. Click **OK** to verify you want to delete the selected vendors from the campaign.

To delete all vendors assigned to the campaign

- 1. If necessary, go to the Vendor List tab for the campaign.
- 2. Click the Delete ALL Assigned Vendors button.
- 3. Click **OK** to verify you want to delete all of the vendors from the campaign.

Releasing outreach campaigns

As you create and edit your outreach campaign, the status on the campaign's Main tab changes from "Outreach incomplete" to "Outreach pending release." *The outreach campaign will not be sent or displayed until you release it*.

To release a campaign

- 1. If necessary, locate and open the campaign.
- 2. Click the release campaign hyperlink.

Outreach Management Main Settings Content Vendor List	1	Help & Tools 💥
Test 4	Out reach pending rele ase » <u>release campaign</u>	Posting Date: 10/8/2012
		Refresh Page
Outreach Campaign Infor	mation	?
Outreach Campaign Title	Test 4	
Status	Outreach pending release » release campaign	
System Transaction Number	00702939-001	
Date Created	9/24/2012	

The first campaign notification will be released on the date you specified in the Outreach Dates area on the Outreach: Update Settings tab. You can still update the campaign content and vendor lists up to the release date. If you no longer want to send the campaign, you can change the campaign status by clicking the Reverse Release hyperlink on the Main tab, but must do so prior to the release date.

NOTE: Outreach notices are sent by the system every hour on the hour starting at 8am EST. Depending on the time you release the campaign, you will usually have up to one hour to reverse the release. Once the campaign is sent out, it cannot be reversed.

Outreach campaigns set for release on a later date will be sent out in the first batch of the day (8am EST).

Copying outreach campaigns

If you need to create a similar campaign to one you already created, you can copy the existing campaign instead of creating a new one. When copying a campaign, you can specify which settings you want to retain, such as the vendor list or the campaign settings.

To copy a campaign

- 1. Locate and open the campaign you want to copy.
- 2. Click the Copy Outreach hyperlink.

		Status	Actions
Outreach Control	Outreach campaign can be ed	ited by anyone in your organization.	Change
Outreach Publicity	The outreach campaign can be	e viewed ONLY by selected vendors.	Change
Assigned Vendors	14 vendors		View Vendors Get Vendors
Notification Type	Neither		Change
Notification & Posting	Scheduled Notice Date: Notice Sent:	10/9/2012 (this is also the date the outreach campaign is posted on the Outreach Bulletin Board) Not Active	<u>Change</u>
First Reminder	Not active		Change
Second Reminder	Not active		Change
Third Reminder	Not active		Change
Deactivation Date	10/12/2012		Change
Other Functions	Close Outreach, Delete Outrea	ch Copy Outreach	

- 3. In the Outreach Campaign Title field, update the campaign title to something new.
- 4. In the **Campaign Copy Options** area, select the items you want to copy to the new campaign.

	Update the title of this campaign:
Outreach Campaign Title *	Test4
Outreach Control *	 Outreach campaign can be viewed and edited by anyone in your organization. Outreach campaign can be viewed by anyone BUT edited only by a designated user (currently you) or an administrator.
Outreach Publicity *	 The outreach campaign can be viewed ONLY by selected vendors. Viewable by all system vendors PLUS posted on the Public Outreach Bulletin Board for viewing by the public. Posted only on the Public Outreach Bulletin Board for viewing by the public.
Campaign Copy Options	
Copy Options *	Select at least one copy option:
	Copy Settings
	Copy Content (including file attachments)

Once all parts of the outreach campaign have been completed, you must Release the outreach campaign to trigger the send out of notifications and posting on the bulletin board, if applicable.

A copy of the outreach notice will be sent to you whenever notices go out.

Create Outreach Campaign Cancel

Copy Vendors/Contacts



5. Click Create Outreach Campaign.

Outreach Status, Setti	ngs & Actions		
		Status	Actions
Outreach Control	Outreach campaign can be ed	ited by anyone in your organization.	Change
Outreach Publicity	The outreach campaign can b	e viewed ONLY by selected vendors.	Change
Assigned Vendors	14 vendors		View Vendors Get Vendors
Notification Type	Neither		Change
Notification & Posting	Scheduled Notice Date: Notice Sent:	10/9/2012 (this is also the date the outreach campaign is posted on the Outreach Bulletin Board) Not Active	<u>Change</u>
First Reminder	Not active		Change
Second Reminder	Not active		Change
Third Reminder	Not active		Change
Deactivation Date	10/12/2012		Change
Other Functions	Close Outreach, Delete Outrea	ach, Copy Outreach	

6. Update the incomplete settings, and then release the campaign.

Composing your message

When composing your message, make your information and instructions easy to understand.

Composing your announcement

Generally speaking, an announcement is composed of four parts – Heading, Pitch, Fine Print, and Directions (if applicable).

Heading: List the basics: name of event, date, sponsoring group, and location. This information appears in the heading of your printed event announcement. For example:

Fourth Annual Business Mingle September 30, Women's Business Council (Hopedale, MA)

Pitch: Start with an opening paragraph. Include the name and date of the event, the sponsoring group, and the general focus. For example:

On the 30th of September, the Women's Business Council is proud to host the Fourth Annual Business Mingle - a day of networking, socializing, and business seminars featuring secrets of the trade.

Then write your pitch, providing event details, such as activities, meals, and speakers.

The Fine Print: Enter the specifics. People want to know:

- When the site opens and closes.
- How much it costs, if applicable.
- How to make reservations.
- Any other important information.

Directions: Give directions from reasonable points, including exit numbers and highway names; compass directions ("Take exit 32 east - W. Main St., Millbury."); landmarks ("Turn right after the Dairy Queen."), but use them in addition to, not in place of, street names and numbers; and mileage from one point to another ("Follow Rte 32 for three miles, then left onto Jones Rd.").

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Sample messages

The following are sample messages. Please note that the events posted are fictional events. Samples are what the vendors would view in their email.

Sample – Open House

MWDBE.com Outreach Notification

Organization: B2Gnow Project: Town Government Open House

Town Government Open House

Begins Tuesday, October 10 at 7:00 PM Morse Institute Library

2013 Town Government Open House

The public is invited to a Town Government Open House on Tuesday, October 10 at 7pm at the Town Library, lower level. This event will provide an opportunity for citizens to meet representatives of many of the Town's boards and committees, including their Town Meeting Members, to better understand what they do, and to explore volunteer opportunities. The Open House is sponsored by the Town Board of Selectmen and the Town Chapter of the League of Women Voters. (The LWV is an independent organization promoting citizen participation in government.)

Town Meeting Members, as well as chairs and members of the Town's elected and appointed boards, commissions and committees are encouraged to attend and to submit information in advance that will be provided to attendees.

This may be done by completing a form at http://www.ourtown.org/openhouse.

Business owners interested in doing business with Town are also encouraged to register and attend. They may register at http://ourtown.org/OpenHouse.

For more information, please call the Selectmen's office at (555) 555-5555, or contact the LWV at openhouse@ourtown.org.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD To view all notices, visit: http://www.mwdbe.com/L.asp?GO=1061&TID=ABCD

MWDBE.com Diversity Management System, powered by B2Gnow http://www.MWDBE.com/

Sample – Conference Sponsorship

MWDBE.com Outreach Notification

Organization: B2Gnow Project: MWDBE Conference - Sponsorship Info

2013 MWDBE Annual Conference Sponsorship Information

Why Should You Be A Sponsor?

Conference sponsorship is a way to showcase your organization's technologies, products and services to substance abuse professionals, managers, staff and decision-makers. Sponsorship creates exposure for your organization, provides an opportunity to broaden your contact with substance abuse professionals, allows you to promote your message and services with these professionals and assists you in increasing your awareness of new trends and



pressing concerns in the Illinois	addictions field
Expected Attendance	250-300
Conference Sponsorship	
following descriptions are desig	ne a Sponsor have numerous price ranges and options from which to choose. The ned to provide you with the information you need to allow your organization to choose nt and exposure to attendees of the MWDBE Conference.
The following sponsorship oppo	ortunities are available:
Co-Host:	
MWDBE Member- \$5,000	Nonmember- \$7,500
Conference Sponsor:	
MWDBE Member- \$1,500	Nonmember- \$2,000
activity sponsorship provides an involvement and exposure to at MWDBE Conference is to netwo	ons wishing to target a specific day, materials, or social event during the conference, a attractive option. This allows your organization to choose your desired level of tendees at the MWDBE Conference. One key reason why attendees come to the rk and establish contact with other professionals in the field, so social events such as ns and Breaks are very well attended.
Breaks- Choose Monday mornin	g, Monday afternoon, Tuesday morning, Tuesday afternoon, or Wednesday morning:
Sole Sponsor- \$500	Co-Sponsor- \$300
Breakfast- Choose Monday, Tue	sday or Wednesday morning:
Sole Sponsor- \$1,500	Co-Sponsor- \$800
Lunch- Choose Monday, Tuesda	y or Wednesday
Sole Sponsor- \$4,000	Co-Sponsor- \$2,500
Awards Reception	
Sole Sponsor- \$6,000	Co-Sponsor- \$2,500
Keynote- Choose Monday, Tueso	day or Wednesday
Sole Sponsor- \$1,500	Co-Sponsor- \$800
Workshop- Contact Dawn Ander	rson to select the workshop to be sponsored
Sole Sponsor- \$500	Co-Sponsor- \$300
	portunities available which will be awarded first-come, first-served, so please act on be interested in a sponsorship package not listed, please contact Dawn Anderson to
Please Log in to your MWDBE ad and terms and conditions.	ccount at http://www.mwdbe.com for additional information regarding applications
To view the notice, visit: http://	www.mwdbe.com/L.asp?GO=1062&TID=ABCD
MWDBE.com Diversity Management System, j http://www.MWDBE.com/	powered by B2Gnow

Sample – Training Notification

MWDBE Outreach Notification

Organization: MWDBE.com Project: B2Gnow Training Announcement

ATTN: ALL INTERESTED STAFF at the Contract Compliance Office

From: Staff Development & Training Division Subject: B2Gnow Contract Compliance Software Training

Personal Computer Software training on B2Gnow Contract Compliance Software is being delivered on an ongoing basis. Each one-day session provides hands-on instruction. The beginning levels are designed for those employees with limited access to the system, and intermediate and advance classes will be available to those in Diversity Management and Contract Compliance Offices.

Who Should Attend:

All interested Equal Opportunity, Purchasing, Diversity, and Contract Compliance office personnel who have DIRECT access B2Gnow Contract Compliance Software. Trainees must commit to immediate practice and utilization following each class in order to derive any benefits from this training. All log in information will be given on the first day of the class.

Dates:

See our schedule and sign up online at http://www.mwdbe.com/ Time: 9:00 am - 4:00 pm Room 494 North Towers Building, State Office

Pre-Registration:

REQUIRED. Supervisors must register participants for B2Gnow Contract Compliance Software training by contacting SD&T as outlined above. Training is limited to 10 participants per class and no one will be admitted without prior approval.

NOTE: DUE TO OVERWHELMING DEMANDS, SOFTWARE CLASSES FILL QUICKLY AND WAITING LISTS FORM. IF YOU CAN NOT ATTEND A CLASS, PLEASE CALL TO CANCEL SO THAT SOMEONE ELSE HAS THE OPPORTUNITY TO FILL THAT SLOT. IF YOU DO NOT CALL TO CANCEL, YOU WILL NOT BE RESCHEDULED FOR THAT CLASS.

Please share this information with appropriate staff. Refer content questions to any SD&T Computer Instructor at (800) 123-4567.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com Diversity Management System, powered by B2Gnow http://www.MWDBE.com/

Sample – Bid Solicitation

MWDBE.com Outreach Notification

Organization: B2Gnow Project: Summer Food Service Program (SFSP)

Contract and Competitive Bidding Process

The Invitation for Bid and Contract, used to procure vended meals for the Summer Food Service Program (SFSP), must be used for all contracts and must be competitively bid if the contract will exceed \$10,000. The materials were developed to assist program sponsors in procuring a contract and include required materials and instructions for completing the competitive bid process.

Included in The Booklet:

- Procurement Procedures
- Instructions for Completing the Invitation for Bid and Contract
- Sample Food Specifications
- Sample Cold Lunch Menus
- Sample Cold Breakfast Menus
- Sample Vendor Letter
- List of Known Vendors

Included in The Packet:

- Contracts, Grants, Loans and Cooperative Agreement
- Invitation for Bid and Contract Prototype
- Menu Forms
- Performance Guidelines
- Post-Contract Award Summary Sheet
- Required Meal Patterns
- Schedule A—Program Sites

A draft copy of the completed Invitation for Bid and Contract, the proposed menus, and a list of intended vendors must be submitted by April 10, 2007 to the Arizona State Board of Education, Dawn Anderson, Nutrition Programs, 1111 Broadway, Houston, Houston, TX 77003, for approval. The Invitation for Bid and Contract package must be approved by AzSBE before you can begin soliciting bids.

This year the bid materials may be downloaded from the website or you may contact Dawn Anderson at 555-555-5555 or email your request to dawn@b2gnow.com to receive a copy of the bid materials.

To view additional information regarding this bid solicitation, please log into your account.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com Diversity Management System, powered by B2Gnow http://www.MWDBE.com/

Sample – Certification Class

MWDBE.com Outreach Reminder

Organization: B2Gnow Project: Town Government Open House

How to Complete the M/WBE Certification Class

Organized by: Department of Small Business Services Division of Economic and Financial Opportunity

Get your application right the first time! Receive assistance from trained certification counselors on how to complete the M/WBE application.

January 27, 2013, 6:00-7:30 P.M. Department of Small Business Services 1111 Broadway, Houston, Houston, TX 77003This workshop is free of charge!

Who Should Attend

The Department of Small Business Services' Minority- and Women-owned Business Enterprise Program (M/WBE) ensures the participation of minority- and women-owned businesses in the procurement process. Firms that have been in business for more than one year and are at least 51 percent owned by a minority or woman are eligible for certification. Under Local Law 129 of 2005, City buyers are held accountable for specific purchasing goals from City-certified M/WBE vendors. Prime contractors are also asked to meet certain M/WBE goals in their subcontracting. All certified M/WBEs have access to free counseling and seminars to help them access City contracting opportunities and are listed in a searchable public online directory that is used by purchasing officers and contracting agencies to find the goods and services they need. Access info about the M/WBE program, including downloadable applications at: http://www.mwdbe.com/getcertified

Additional Information:

Telephone: 555-555-5555

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com Diversity Management System, powered by B2Gnow http://www.MWDBE.com/

Creating Vendor Lists

If you expect to send multiple outreach campaigns to the same vendor lists, or would like to create lists for other staff to use, you can create them for easy access.

You create the list, specifying list settings, such as who can view the list, and then you add vendors to the list.

To create a vendor list

- 1. Open the Create menu, and then click New Vendor List.
- 2. In the Vendor List Parameters box, complete the following:

Vendor List Title: Enter a title for the list.Description: Describe the list.Vendor List Editing: Specify who can edit the list.Vendor List Access: Specify who can view and use the list.

dor List Help & 1	ools 💥
ers	C
	A
 Vendor list can be edited by anyone in your organization. Vendor list can be edited only by a designated user (currently you). 	
 Vendor list can be viewed and used by anyone in your organization. Vendor list can be viewed and used only by a designated user (currently you) 	
	 Vendor list can be edited only by a designated user (currently you). Vendor list can be viewed and used by anyone in your organization.

3. Click Create Vendor List.

- A list with the basic parameters is created.
- 4. Click Add Vendors.

Outreach: Vendor List		Help & Tools 💥
Add Vendors		Edit Vendor List Parameters
Vendor List		(?
Title	Sample Vendor List 1	
Description	An example list.	
List Owner	Houston Admin7	
List Editing	Vendor list can be edited by anyone in your organ	ization.
List Access	Vendor list can be viewed and used by anyone in	your organization.

5. On the **Search: Vendors** page, enter the criteria by which you want to complete the search, and then click **Search All Matches**.



6. At the bottom of the search results page, click Add to Vendor List.

Search: Vendors



Export

Users Vendors Contracts Concessions Outreach

Listed below are all of the vendors that match your search criteria. Use the sort and filter functions of the table to reduce the size of the list. You can view more listings by using the navigation line at the bottom of the table.

Business Name	Phone Number	Location	Actions
All 🔻			
ASKREPLY, INC., DBA B2GNOW	602-325-9277	Phoenix, AZ	20021155 Edit QuickView Contract Concessions Certs
B2Gnow Test 6	602-325-9277	Phoenix, AZ	20051275 Edit QuickView Contract Concessions Certs
32Gnow Test Vendor 10	602-325-9277	Phoenix, FL	20079187 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 11	602-325-9277	Phoenix, FL	20079197 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 2, DBA Cool Beans	555-555-5555	Orlando, FL	20033683 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 24	602-325-9277	Phoenix, AZ	20088859 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 3	602-325-9277	Phoenix, AZ	20049188 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 4	602-325-9277	Phoenix, AZ	20018259 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 6	123-123-1231	Phoenix, AZ	20050068 <u>Edit QuickView</u> <u>Contract</u> <u>Concessions</u> <u>Certs</u>
B2Gnow Test Vendor 7	602-325-9277	Phoenix, AZ	20052159 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 73	888-555-1234	New York, NY	20187169 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 8	222-222-2222	Phoenix, AZ	20050069 <u>Edit QuickView</u> <u>Contract</u> <u>Concessions</u> <u>Certs</u>
B2Gnow Test Vendor 9	602-325-9277	Phoenix, FL	20079186 Edit QuickView Contract Concessions Certs
B2Gnow Test Vendor 99	480-325-9277	Phoenix, AZ	20072869 Edit QuickView Contract Concessions Certs
B2Gnow Training Vendor	602-325-9277	Phoenix, AK	20067789 Edit QuickView Contract Concessions Certs
Sprinkles Car Wash, DBA B2Gnow Test Vendor	602-325-9288	Pasadena, CA	20128754 <u>Edit QuickView</u> <u>Contract</u> <u>Concessions</u> <u>Certs</u>

1 - 16 of 16 records displayed: Page 1 -

Search Again

Add to Outreach Add to Vendor List

7. Click **OK** to confirm you want to add the vendors to the vendor list.

Add New Vendor

8. On the **Outreach: Add Vendors to Vendor List** page, select the name of the list to which you want to add vendors, click **Add Vendors to Vendor List**, and then click **OK**.

* required entry	
Parameters	
Vendor Count	16
Vendor List *	Select a vendor list 💌
Comment/Label	

NOTE: Use a comment/label that describes the type of search you ran. This will differentiate vendors added from multiple searches.



You can repeat this process to search and add as many sets of vendors as you need. Although there is a per search limit of 5,000 matches, this limit does not apply to the number of firms you can add to your campaign.

To view all vendor lists

- 1. Open the View menu, and then click Vendor Lists.
- 2. To view a specific list, click the **View** hyperlink for the list.

Dutreach	: Vendor Lists		Help & Tool	s
	1 - 5 of 5 records displayed: Prev		Records per page Refresh List Re	10
o resort clic Action	ck on column title. To filter click on any List Title	drop down menu.	<u>Owner</u>	Section
	All 👻		All 👻	
View	Sample Vendor List 1	0	Houston Admin7	
View	Test	0	Admin User 1	
View	MBE Outreach	14	Houston Admin7	

Working with vendor lists

You can work with and manage your vendor lists by adding or deleting vendors, adding the list to an outreach campaign, exporting vendor details into a comma-separated values (.csv) file, editing list settings, and copying the vendor list.

To delete a vendor from a vendor list

- 1. On the Outreach: Vendor List page, click the View hyperlink for the list you want to open.
- 2. To delete a specific vendor, select the check box for the vendor you want to delete, click the Delete button, and then click OK.

Outreach: Ve	endor List				Help & Tools 🛠
Add Vendors		o Outreach	Export List	Edi	t Vendor List Parameters
Vendor List					?
Title		MBE Outreach			
Description					
List Owner		Houston Admin7			
List Editing		Vendor list can be	e edited by anyone	in your organization.	
List Access		Vendor list can be	e viewed and used	by anyone in your org	ganization.
To resort click on (column title.				Refresh Table Clear Filters
System Vendor #	ŧ	Vendor		Comment	Actions Delete
		All 👻			Delete
<u>20079187</u>	B2Gnow Test Vende	or 10			User List
<u>20079197</u>	B2Gnow Test Vende	<u>or 11</u>			User List
<u>20033683</u>	B2Gnow Test Vende	<u>or 2</u>			User List



3. To delete the entire list, click **Delete ALL Assigned Vendors**, click **OK**, and then click **OK** again.

20187169	B2Gnow Test Vendor 73		User List	
20050069	B2Gnow Test Vendor 8		<u>User</u> List	
<u>20079186</u>	B2Gnow Test Vendor 9		<u>User</u> List	
<u>20072869</u>	B2Gnow Test Vendor 99		<u>User</u> List	
<u>20128754</u>	Sprinkles Car Wash		<u>User</u> List	
1 -	14 of 14 records displayed: Previous Page < Page 1 -	> Next Page Re	cords per page	20 🔻
	Copy Vendor List Delete ALL Assigned Vendors	Delete Vendor	List	

To add a vendor list to an outreach campaign

- 1. On the **Outreach: Vendor List** page, click the **View** hyperlink for the list you want to open.
- 2. Click **Transfer to Outreach**, and then click **OK** to confirm you want to add the vendors in the selected list to a campaign.

The Outreach Management: Add Vendors to Outreach Campaign page displays.

Outreach: Vendor List	Help & Tools 💥
	er to Outreach Export List Edit Vendor List Parameters
Vendor List	(?)
Title	MBE Outreach
Description	
List Owner	Houston Admin7
List Editing	Vendor list can be edited by anyone in your organization.
List Access	Vendor list can be viewed and used by anyone in your organization.

3. From the **Vendor Contact Type** list, select the contact to which you want to send the campaign.

Outreach Managemen	t: Add Vendors to Outreach Campaign Help & Tools 💥
* required entry	
Parameters	(?
Vendor Count	14
Vendor Contact Type *	Select a vendor contact type 💌
Outreach Campaign *	Select an outreach campaign 🔻
Comment/Label	

- 4. From the Outreach Campaign List, select the name of the campaign.
- 5. Click Add Vendors to Outreach Campaign, and then click OK to confirm you want to add the list to the campaign.



To export vendor details

- 1. On the **Outreach: Vendor List** page, click the **View** hyperlink for the list you want to open.
- 2. Click Export List.

The Search: Export Vendors page displays.

Outreach: Vendor	List	Help & Tools 💥
Add Vendors	Transfer to Outreach Export List	Edit Vendor List Parameters
Vendor List		(?
Title	MBE Outreach	
Description		
Description List Owner	Houston Admin7	
	Houston Admin7 Vendor list can be edited by anyone in you	ur organization.

3. Select the fields you want to export to a .csv file, click **Export Records**, and then save the file.

To edit vendor list settings

- 1. On the **Outreach: Vendor Lists** page, click the **View** hyperlink for the list you want to open.
- 2. Click Edit Vendor List Parameters.

Outreach: Vendor Lis	st	Help & Tools 💥
Add Vendors	ransfer to Outreach Export List	Edit Vendor List Parameters
Title	MBE Outreach	U.
Description		
List Owner	Houston Admin7	
List Editing	Vendor list can be edited by anyone in yo	ur organization.
List Access	Vendor list can be viewed and used by an	yone in your organization.



3. Edit the settings, and then click **Save Changes**.

Outreach: Vendor List	Help & Tools 💥
	er to Outreach Export List Edit Vendor List Parameters
* required entry Vendor List Parameters	e (* 1
Vendor List Title *	MBE Outreach - 12/31/12
Description	*
List Owner *	•
List Editing *	 Vendor list can be edited by anyone in your organization. Vendor list can be edited only by the list owner.
List Access *	 Vendor list can be viewed and used by anyone in your organization. Vendor list can be viewed and used only by the list owner.
	Save Changes Cancel

To copy a vendor list

- 1. On the **Outreach: Vendor Lists** page, click the **View** hyperlink for the list you want to open.
- 2. Click Copy Vendor List.

The Outreach: Create Vendor List page displays.

20052159	B2Gnow Test Vendor 7	Us L	ser 🔲
<u>20187169</u>	B2Gnow Test Vendor 73		ser 🗖
<u>20050069</u>	B2Gnow Test Vendor 8		ser 🗖
<u>20079186</u>	B2Gnow Test Vendor 9	<u>Us</u>	ser 🔲
<u>20072869</u>	B2Gnow Test Vendor 99		ser 🔲
<u>20128754</u>	<u>Sprinkles Car Wash</u>		ser 🔲
1 -	13 of 13 records displayed: Previous Page < Page 1 🔹	> Next Page Record	s per page 20 🔻
\subset	Copy Vendor List Delete ALL Assigned Vendors	Delete Vendor List	



3. In the Vendor List Copy Options box, select Copy Vendors/Contacts.

* required entry	
Vendor List Paramet	ters
Vendor List Title *	Update the title of this vendor list:
venuor List ritte	MBE Outreach
Description	Update the description of this vendor list:
Vendor List Editing *	Wendor list can be edited by anyone in your organization.
	Vendor list can be edited only by a designated user (currently you).
Vendor List Access *	Vendor list can be viewed and used by anyone in your organization.
	Vendor list can be viewed and used only by a designated user (currently you).
Vendor List Copy Op	otions
Copy Options *	Select a copy option:
	Copy Vendors/Contacts

4. Click Create Vendor List.

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Creating events

Through the Event Management module, you can create and manage events and track attendees. When you create an event, you can specify the event type and who can view and RSVP for the event. For example, you can create a Training event for staff users or a Vendor Fair event available to all vendors and the general public. Users view the event list and RSVP to specific events through the Transactions: Event Management page.

To create an event

- Open the Create menu, and then click New Event. The Event Management: Add Event page displays.
- 2. In the Event Information box, complete the following:

Event Title: Enter the title of the event
Event Information: Enter information about the event.
Event Instructions: Enter special instructions about the event.
Event Instructions in Confirmation: Enter attendee-only information you want to show after a contact accepts the event invitation.

Event Management: Add Event

```
Help & Tools  💥
```

Add information about your event and adjust the default settings as needed. This event can edit edited only by the listed Event Coordinator.

* required entry		
Event Information		?
Event Title *		*
Event Information *	» Enter information describing the purpose of the event. This information is displayed to all users.	
		*
Event Instructions	» Enter optional instructions for the event (directions, etc.). This information is displayed to users.) all
		*
Event Instructions in Confirmation	» Enter optional restricted instructions for the event (special directions, login information, etc.). This information is displayed after RSVP and in the confirmation email.	
		*
		-

3. In the **Event Settings** box, complete the following:

Event Type: Select the type of event you want to create.
Event Date: Select the date on which the event will take place.
Event Start Time: Select the time at which the event will start.
Event End Time: Select the time at which the event will end.
Attendance Limit: Specify the maximum number of attendees.
User Types: Specify the types of users who can see the event.



Require RSVP: Specify whether an RSVP is required to attend the event. **RSVP Cut-Off Date**: Select the latest date on which attendees can RSVP. **Event Coordinator**: Select the name of the person coordinating the event.

Event Settings		?
Event Type *	Select event type 🔻	
Event Date *		
Event Start Time *		
Event End Time *		
Attendance Limit *	No additional RSVPs will be accepted after the limit is reached.	
User Types *	Select User Types Event will only be viewable by the selected user types.	
Require RSVP *	Yes 🔻	
RSVP Cut-Off Date *		
Event Coordinator *	Houston Admin7 -	

4. In the **Notifications** box, complete the following:

Send Confirmation Notice After RSVP: Specify whether you want to send a confirmation notice to attendees after they RSVP.

Send First Reminder Notice: Specify whether you want to send a reminder notice about the event, and then select the number of days prior to the event that you want attendees to receive the reminder.

Send Second Reminder Notice: Specify whether you want to send a second reminder notice about the event, and then select the number of days prior to the event that you want attendees to receive the reminder.

Send Third Reminder Notice: Specify whether you want to send a third reminder notice about the event, and then select the number of days prior to the event that you want attendees to receive the reminder.

Send Thank You Notice After Event: Specify whether you want to send a thank you notice to attendees after they attend the event.

Notifications	(?)
Send Confirmation Notice After RSVP *	Yes •
Send First Reminder Notice *	Yes 🔹 - 7 days before event 💌
Send Second Reminder Notice *	Yes 🔹 - 3 days before event 💌
Send Third Reminder Notice *	Yes 🔹 - Same day of event 💌
Send Thank You Notice After Event *	Yes •



5. In the **Additional Information** box, enter any notes or comments you want internal users to view. Additional Information is not displayed publicly.

Additional Inform	ation	C
Event Notes	» Enter additional information about this event for internal use, such as feedback, action items, etc. This information is not displayed publicly.	
		4
		-

6. Click Save, and then click OK.

After you create events, users can view and RSVP to them.

Managing events

You view and manage events through the Transactions: Event Management page. You can access and update event settings and work with the attendance list. After an event, you should always log attendants for all registrants.

To view the event list

- 1. Open the View menu, and click Events.
- 2. To edit an event, in the **Actions** column, click the **Settings** hyperlink.

Fransactio									-		
Contracts Co	ontract Audits	Workforce	Audits	Concessions	Conc Audits C	Outreach Cert	t Apps Cert Ch	ange Requests	Application	s Support	Messag
					tion column to vito return to the e		n and details o	f a particular eve	nt. You car	n adjust the fi	ilters an
		Search		New Event		F	rom: 11/27/2	12 To:	2/2/2013		Go
		1 - 2 of	2 recor	ds displayed: P	revious Page	< Page 1	 Next Pa 	ge		rds per page	
o resort click	c on column ti			ds displayed: P	-	< Page 1	 Next Pa 	ge		rds per page efresh List <u>R</u>	
resort click	c on column ti Statu	itle. To filt		on any drop d	-		 Next Pa Event Date 	ge <u>Type</u>			eset Fil
		itle. To filt	er click	on any drop d	own menu.			-		efresh List R	leset Fil nator
	Statu	itle. To filt IS T	er click RSV	on any drop d	own menu.			Туре	R.	efresh List <u>R</u> Coordin	eset Fil

3. To view the list of attendees, in the Actions column, click the Attendance hyperlink.

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To manage the attendee list

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Attendance** hyperlink.

The Event Management: Attendance List displays.

2. To mark all attendees as having attended the event, click Mark All Attended.

Event Manageme	Help & Too	ls 💥					
Settings Attendance List Event List							
Introduction to Event N		Open, 9 spa	ce(s) left				
	12/7/2012 10:00 am N						
Once the event has finished, or during the check in-process, mark the attendees as "attended" or "no show". The day after the event, all "attended" attendees will receive a Thank You notice, if configured.							
		r où nouce, ir coniigured.			Sort By: RSVP [Date 🔻	
Attendees - cur		r ou nouce, il conligueu.			Sort By: RSVP [Date 🔻	
		Email	Phone	RSVP Date	Sort By: RSVP C	?	
Attendees - cur	rently 1		Phone		Actions	?	

3. To cancel all RSVPs, click Cancel All RSVPs, and then click OK.

To manage a specific attendee

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Attendance** hyperlink.

The Event Management: Attendance List displays.

2. To mark the attendee as having attended the event, click the **Attended** hyperlink for the attendee.

Lven	nt Managemo		Help & Tools	*			
Setting	Attendance Li	st Event List					
Introduction to Event Management Op							s) left
12/7/2012 10:00 am Moun							intain
		ed, or during the check in-proces ded" attendees will receive a Than			or "no show"	. The day Refre	sh
Atte	endees - cur	rently 1				Sort By: RSVP Date	?
Atte #	endees - cur _{Name}	rently 1 Organization	Email	Phone	RSVP Date	Sort By: RSVP Date	?
#			Email kay@bossofwords.com	Phone		Actions	?

- 3. To mark the attendee as not having attended the event, click **No Show**.
- 4. To cancel the RSVP, click **Cancel**, and then click **OK**.
- 5. To send a message to the attendee, click the attendee's name or the **Message** hyperlink, complete the fields, click **Review/Next**, and then click **Send**.

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To add an attendee RSVP

It is sometimes necessary to add an attendee directly to an event.

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Attendance** hyperlink.

The Event Management: Attendance List displays.

- 2. On the Event Management: Attendance List page, click Add Attendee.
- 3. Complete the following:

First Name, Last: Enter the attendee's first and last name.

Organization: Enter the name of the attendee's organization.

Email: Enter the attendee's email address.

Phone: Enter the attendee's phone number.

Confirmation: Select to automatically send an email confirmation when the attendee responds to the invitation.

Event Management: Atten	dance List	Help & Tools 🛠
Settings Attendance List Event List		
Introduction to Event Management		Open, 10 space(s) left
		12/7/2012 10:00 am Mountain
	e check in-process, mark the attendees as "attended" will receive a Thank You notice, if configured.	or "no show". The day Refresh
		Sort By: RSVP Date 🔻
Attendees - currently 0		3
No attendees yet.		
Add Attendee	Mark All Attended Cancel All RSVPs	Message All Attendees
Complete required (*) fields and click	RSVP for Event to reserve a space.	
First Name, Last *		
Organization *		
Email *		
Phone	-	
Confirmation	Send email confirmation	
	RSVP for Event Cancel	

- 4. Click **RSVP for Event**.
- 5. Click **OK** to confirm you want to add the RSVP, and then click **OK** again.



To add notes about the event

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Setting** hyperlink.

The Event Management: Edit Event page displays.

2. In the **Additional Information** box, enter any event notes. This information is not displayed publicly.

Additional Information		?
Event Notes	» Enter additional information about this event for internal use, such as feedback, action items, etc. This information is not displayed publicly.	
		^
		-