

Welcome To Expotrac!

Thank you for choosing Expotrac. We wanted to make sure that our users have a full user manual in case they needed a quick reference guide. Here you can find all of the answers you need in a timely manner rather than waiting for a response from our support team.

Getting Started And Creating Your First Show

Congratulations, you've purchased your account subscription. Now, where do you go from here?

To create your first show, simply navigate to the "Shows" section of the dashboard. From there, click on the "New Show" button at the top right corner of your screen. Be sure to give your show a title and select which badge option works the best for you.

You can add a start date and end date to your event and once your show is over, you can also archive it for access to the information later on.

Below the "General Information" section, you will also see a "Custom Fields" section.

Custom Fields

Custom fields are used for additional information that is specific to an individual attendee. For example, if your custom field is a VIN Number, no one will have the same VIN Number. That information is dependent on the individual. You can fill in or leave as many as you want blank, however, it is important to note that these fields must be created before you import registrants into the Expotrac system.

Codes

Once your show is active, you'll see another portion of the dashboard called "Codes." Here you are able to create discount codes or attach separately ticketed classes/sessions to your registrants. For example, if some folks sign up for a Continuing Education course but others decline, you will be able to track who is attending by assigning them the specific code.

Like custom fields, codes must be created before you import registrants. Let's name your code CE Course. For the Type section, you can input Class. For the Title you can call it whatever you would like. Attendance/Usage will let you add a limit to the amount of usages for this, should you have one. If not, simply leave this section blank. Feel free to set a price for the course as well or, keep it at \$0.00. If you wish for some sort of Text associated with the code to appear on a badge, simply type the text in the Badge Text field. Once you are all set, click the create button and your code will be live. When you download the Excel template for your registrant

import, you'll see the column with the designated code. Here you can apply a Yes or No designation.

You can also add a discount code. Let's call it 10OFF. In the Type field, let's call it Discount. The title can mimic the code you choose for this example. Again, the Attendance/Usage section is relevant if you are placing a limit on the amount that the code can be used. You'll set the price as -\$10.00 to reflect that discount. In this example, you may not want to add badge text as it would solely be for keeping track of who used the specific code for their discount.

Once you've set your codes, hit the "Create" button. Your code will now appear in the "Codes" section. Remember, before we get to importing your registrants, you will want to make your show active and that any custom fields or codes have been created. You can make your show active by clicking on the activate button next to the show as it appears in your list of shows.

Importing Registrants

Now that you have your show created, your custom fields filled out and your show set to active, you can now begin the process of importing your registrants. In the sidebar, you'll see the "Registrants" tab. Click on the tab which will take you to a blank section.

There are two methods of inputting registrants into Expotrak. You can add an individual registrant by clicking on "New Registrant" in the top right corner of the screen. This would be ideal for any on-site additions/walkins that you may have during the show.

The next method of uploading registrants is perfect for batch uploads. Simply click on the three dots next to the New Registrant button.

Next, you will click on import registrants which will open up a new prompt. Please note, you **MUST** use the Excel Template that is designated in the prompt. Click on "Excel Template" to download the required template.

After downloading the template, input the attendee information in the designated fields and save the information. Once your Excel template is ready to upload, go back to Expotrak and import the file via the Drag and Drop or browse option presented in the prompt.

If your upload was successful, all of your registrants will be listed in the registrants section of your dashboard.

Badges And Printing

Now that your show has been created and your registrants are all uploaded, you are ready to start printing.

Badge Creation/Editing

In the “Badges” section of the dashboard you will be able to access four styles of badges. You are able to duplicate these styles and add a bit of customization to it. There are a few important pieces of information that you need to know when customizing your badge.

- Width - The width dictates the spacing between the lettering on your name badge. Expotrac has it set at 790, though, if you believe that the spacing is a bit too much or too little, you may tweak it to your liking. You must hit save to see how the changes will appear.
- Horizontal Position - The Horizontal Position dictates how the text, image or barcode is displayed across the name badge. That being said, we do have three alignment settings that would be of more use when trying to left, center or right justify text.
- Vertical Position - Similar to the Horizontal Position, the Vertical position dictates the position of text, barcode or images on the vertical axis. You may find this more useful when adding additional custom text or with the addition of an image to the name badge.
- Now that you have an understanding of the positioning, you’ll see towards the bottom of the name badge builder there is a button that allows you to add an additional badge line. Here, you can add additional registrant info, more custom text, a barcode or an image with four options of the appearance. Once your field is added, you will need to adjust the position of the field to your ideal placement. You can also make a quick adjustment to the vertical position of the additional field by clicking on the up and down arrows in the right corner of the section and dragging it to the desired position between other sections.

Setting Up Printnode On Your Device

Printnode is the technology that connects your printer to Expotrac. You can download the software by visiting (insert link). Once you download the software that is compatible with your PC or Mac, you can open it up and sign in with a new account. It’s important that you always keep your Printnode software up to date in order to prevent any errors from occurring when connecting your printer or trying to print a name badge. You can check the status of your current software by visiting ([link](#)) or by visiting (insert link). If your version matches the versions displayed on these links then you are up-to-date with the latest software updates.

Connecting Your Printer

After you’ve completed the Printnode setup on all of the laptops you intend on using for your registration area, you’ll need to connect your ZDesigner printer to at least one of the laptops via the USB cable provided. Open up your Printnode software and power on the printer. You should see the printer appear in the printers section. Be sure that the printer is marked as online, with the checkbox checked off.

Once the printer is connected, you can navigate to your Expotrak dashboard and click on the “Printers” section on the side. Your printer should appear in the list of printers along with its status of online/offline. If the printer is online you will then need to make the printer active as well.

With your show active and your printer active, you can feel free to make a test print to be sure that your printer is working properly. Once the printer is fully functioning, you can access it on other laptops wirelessly by having other users make both the show and printer active through their Expotrak dashboard as well.

Exporting Registrants

At the end of your event you have the ability to export all registrants simply by visiting the “Registrants” section of the dashboard and clicking on the three dots located next to the “New Registrant” button. Simply click Export and once the Excel spreadsheet is done populating your registrants, you will receive an email containing a link to download the file.

Account Management

You can manage your account information through the “Billing” section of the dashboard, located under the “Account” area of the dashboard. Under billing you can change your subscription plan, edit your payment information, track your billing activity and access receipts.

User Creation/Editing

We understand that as the account owner, you may not be the individual that will be checking attendees in during registration for your show. So, we’ve given you the opportunity to create new users with specific roles. To do so, you’ll need to go to the “Users” section on the dashboard. In the top left, you’ll see a button that says “New User,” once you click on the button you’ll be taken to a page where you can input a user’s name, Email, create a password and set a time zone. You can also choose whether they can access all shows or not. There are three role options for your new user: Account Owner, Admin or User. You can see the different abilities that each type of user has below. Once you create the new user, they are able to log in to their account with the email and password used to create the account.

- The Account Owner is able to access the full Expotrak system, including billing and the account profile. They are able to make changes to any and everything that exists within their account.

- Admins have the ability to create shows, name badges and edit any information pertaining to your show. However, they will not be able to access billing or profile information as it pertains to your subscription and payments.
- Users have the ability to print name badges, add registrants, and activate shows and printers. Those are the sole functions that they will be able to have.