



Angels SpotMe Registration Manual

Version 6 – March 2024



Content

1. [Get started with SpotMe](#)
2. [Get started with your event](#)
3. [Translation](#)
4. [Registration Design](#)
5. [Emails](#)
6. [Registration Settings](#)
7. [SpotME EID for Angels website landing page](#)
8. [Before going live: set event in production mode](#)
9. [Q&A contacts](#)

Get started with SpotMe

Step 1 – Complete SpotMe Certificate

Before starting with this manual, make sure you have completed the necessary spotme certifications and send them to Angels Core Team

(angelscoreteam@iqvia.com) to receive access and a permission to use it.

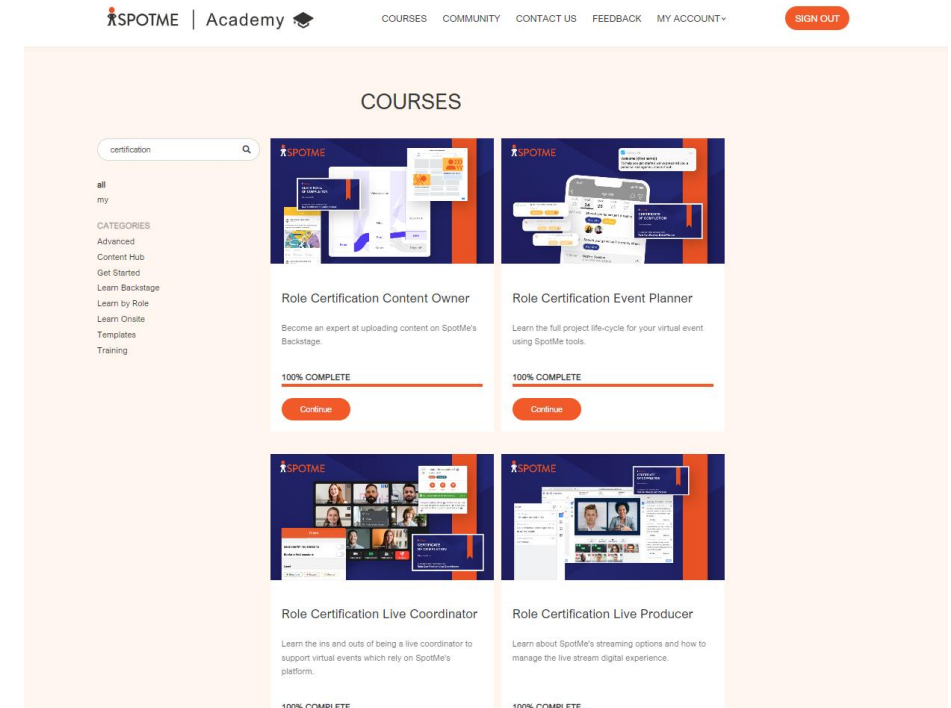
Sign up and complete your certification here (note this is a individual certificate and only valid for the person who completed the certificate):

<https://academy.spotme.com/courses>

Required certificates:

- Certification Content Owner
- Certification Event Planner
- Certification Live Coordinator
- Certification Live Producer

After having send your certificates to the Angels Team, you will receive an email to set up your SpotMe Backstage account.



Get started with SpotMe

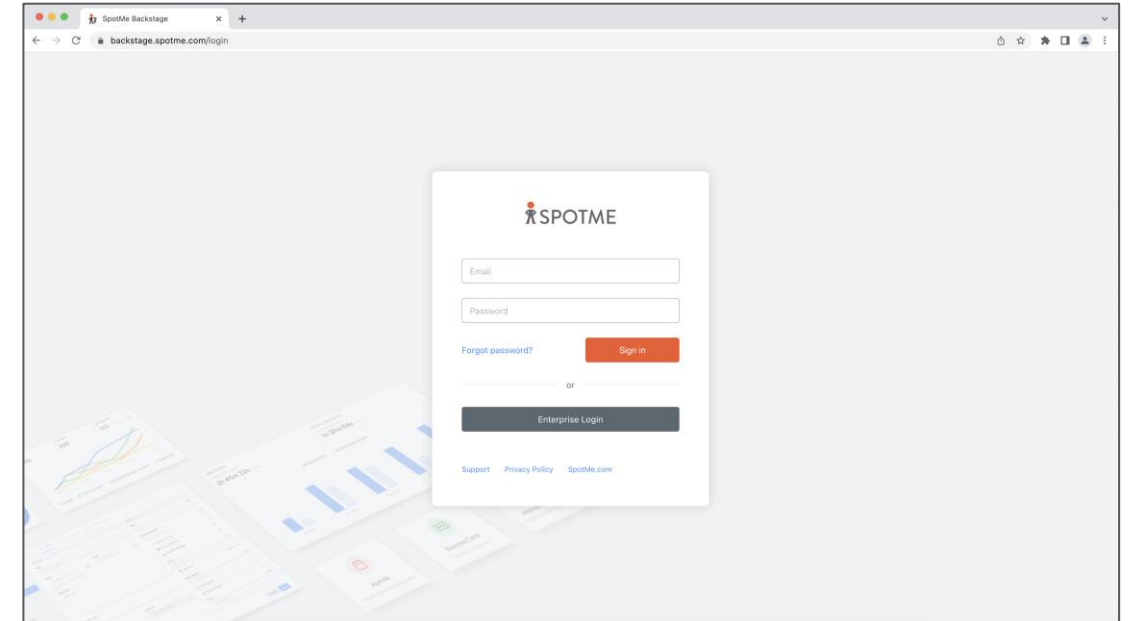
Step 2- Logging into SpotMe Backstage

URL: <https://backstage.spotme.com/>

Login with your SpotMe backstage account, if you have not been set up with one, please contact angelscoreteam@iqvia.com

Password reset after 90 Days

Note that you will be requested to reset your password after 90 days period. It will show as “invalid email or password”. Please just click on “Forgot password” button to reset it.

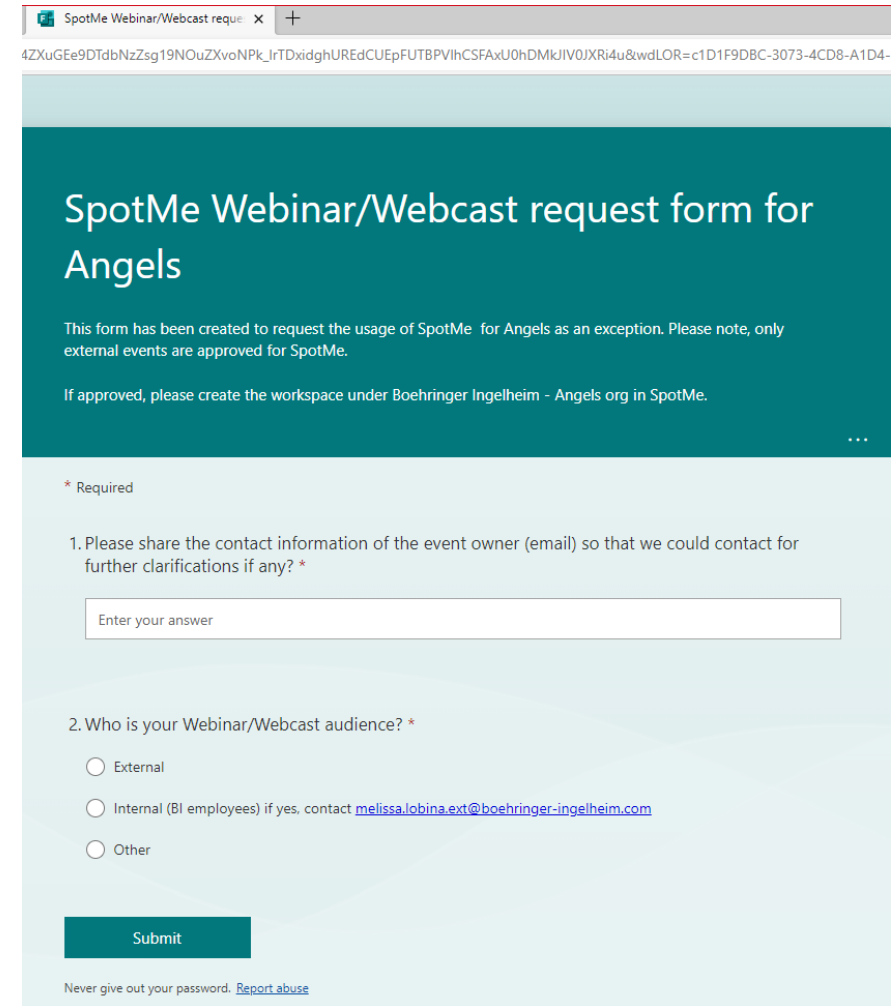


Get started with your event

Step 1 - Requesting Permission

Before setting up a workspace, the Angels Core Team will fill in a request form for to get approval to use SpotMe for this workspace for Angels. Please reach out to your Angels Core Team contact when you want to set up a workspace.

Once the workspace request is approved, you will receive an approval email and are then able to start setting up the workspace.



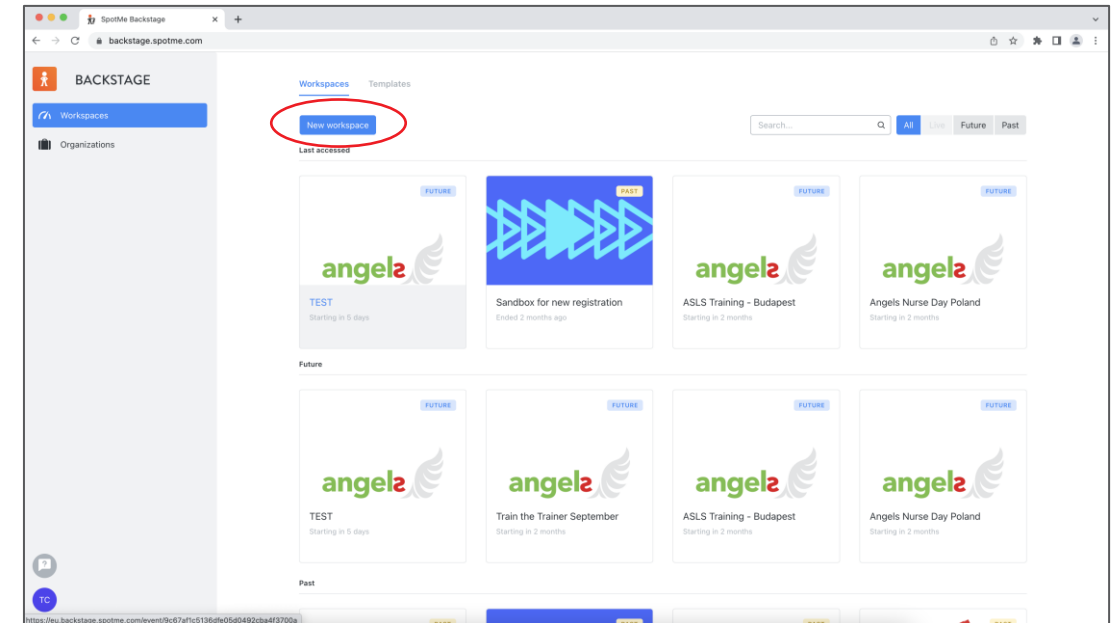
The screenshot shows a web browser window with the title "SpotMe Webinar/Webcast request form for Angels". The URL is a long alphanumeric string. The form has a teal header with the title "SpotMe Webinar/Webcast request form for Angels". Below the header, there is a paragraph: "This form has been created to request the usage of SpotMe for Angels as an exception. Please note, only external events are approved for SpotMe." followed by "If approved, please create the workspace under Boehringer Ingelheim - Angels org in SpotMe." and a three-dot menu icon. The form body is light blue and contains a section titled "* Required". The first question is "1. Please share the contact information of the event owner (email) so that we could contact for further clarifications if any? *", followed by a text input field with the placeholder "Enter your answer". The second question is "2. Who is your Webinar/Webcast audience? *", with three radio button options: "External", "Internal (BI employees) if yes, contact [melissa.lobina.ext@boehringer-ingelheim.com](\"mailto:melissa.lobina.ext@boehringer-ingelheim.com\")", and "Other". At the bottom of the form is a teal "Submit" button. A footer note says "Never give out your password. [Report abuse](\"#\")".

Get started with your event

Step 2 - New Workspace

Once logged in you will see tiles showing all the upcoming and past workspaces.

To start a new project, click 'New Workspace' at the top of the page.



Get your event started

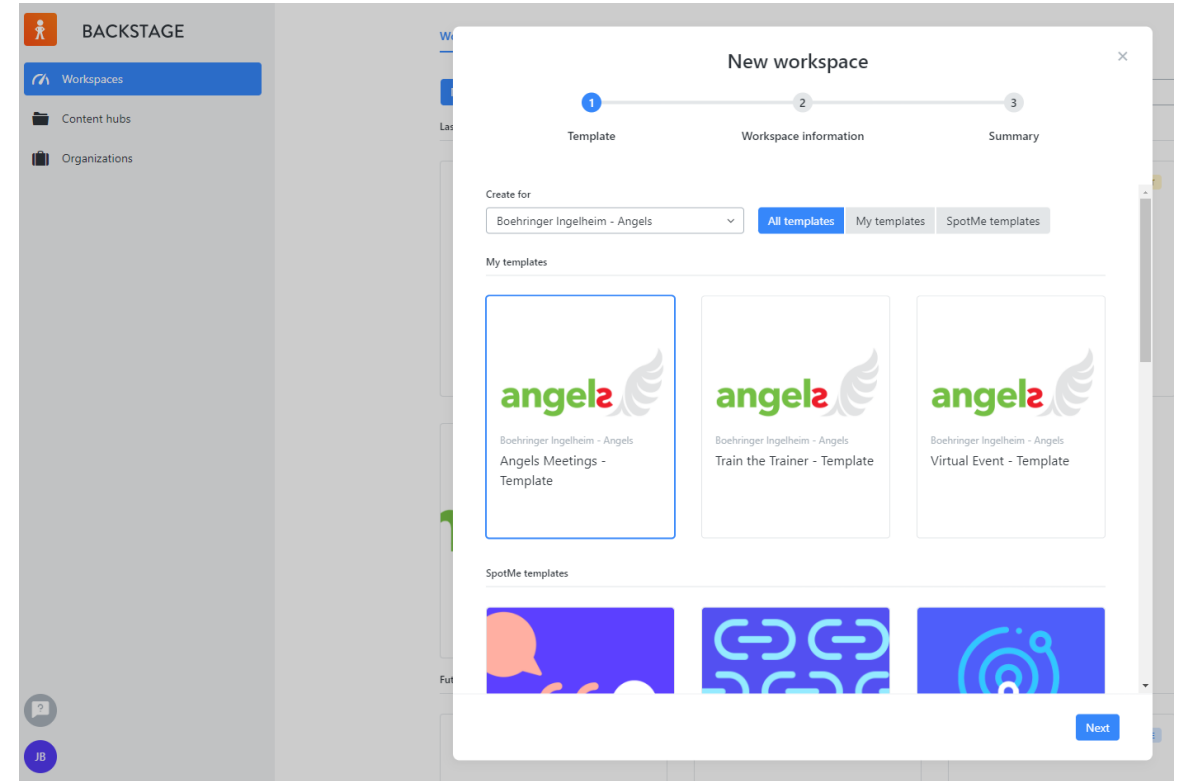
Step 3 - Choosing a Template

When selecting 'New Workspace', the option for you to use a template will pop up.

- Select 'Angels Meetings - Template' for f2f events
- Select 'Virtual Event - Template' for online events

If the respective templates does not appear, click into

- 'Organisations' on the left of your page
- 'Boehringer Ingelheim - Angels'
- 'Workspaces'
- 'Templates'
- Find 'Angels Meetings - Template' / 'Virtual Event - Template' and press JOIN.



Get your event started

Step 4a – New workspace details: Workspace information

Fill in the relevant information and click Next.

Please take your time at this point, choosing the

- Workspace name (as stated in SpotMe request form in step1)
- Event dates with starting and ending time
- Event format
- Audience type (Always External for Angels events)
- Scope of the Event
- Expected attendees
- Privacy (no changes required)
- Container App (always choose “Angels Events”)
- Test workspace: Never tick this box. Test workspaces should not be created within this organization.

New workspace

1 2 3 4 5
Template Workspace information Event type Location & timezone Summary

Workspace details

Workspace name
Workspace name that you used in the SpotMe request from (Step1)

Starts at Ends at
2024-01-30 16:00 2024-01-30 20:00
Once the end date has passed you will no longer be able to change these dates.

Event specifications

Event format

Audience type ⓘ

Scope of the event

Expected attendees
50-100

Privacy

Users will have to accept requirements specified in the documents selected below before accessing the workspace. At least one privacy policy must be selected to create a workspace.

Privacy policies [Create](#)
Boehringer Ingelheim Terms of Use x Bohringer Ingelheim Privacy Notice x

Container app

Default app to host this workspace
Angels Events (angels)
This workspace will be visible only in this app

Test workspace

☐ This is a test workspace
Check this box if this workspace is used for testing, training, or demo purposes. Seats and other entitlements will not be consumed in this workspace.

Get your event started

Step 4b – Event type

Click on the relevant field and click Next.

Note that we usually choose “Customer Training” for our Angels events (e.g., National or regional Angels Day, Angels webinars) considering healthcare professionals as our customers.

New workspace ×

1 2 3 4 5

Template Workspace information Event type Location & timezone Summary

Advisory Board	Congress
Customer Launch/Product Meeting	Customer Training
Investigator meeting	Speaker Program/Meeting
Standalone Medical Meeting/Conference	Symposia
Other	

Back Next

Get your event started

Step 4c – Location & time zone

Fill in the relevant information and click Next.

Please take your time at this point, choosing the

- Country in which your event takes place
- Location – can be a city or the venue or online
- Time zone – it is important that you choose the correct time zone for your event, since it will adjust to the participants browser time zone
- Data location



By clicking on “Next” you will get to a summary page, please double check that all information is correct. After that click on “Create Workspace”.

Location and time zone

Country ⓘ

Location ⓘ

Time zone

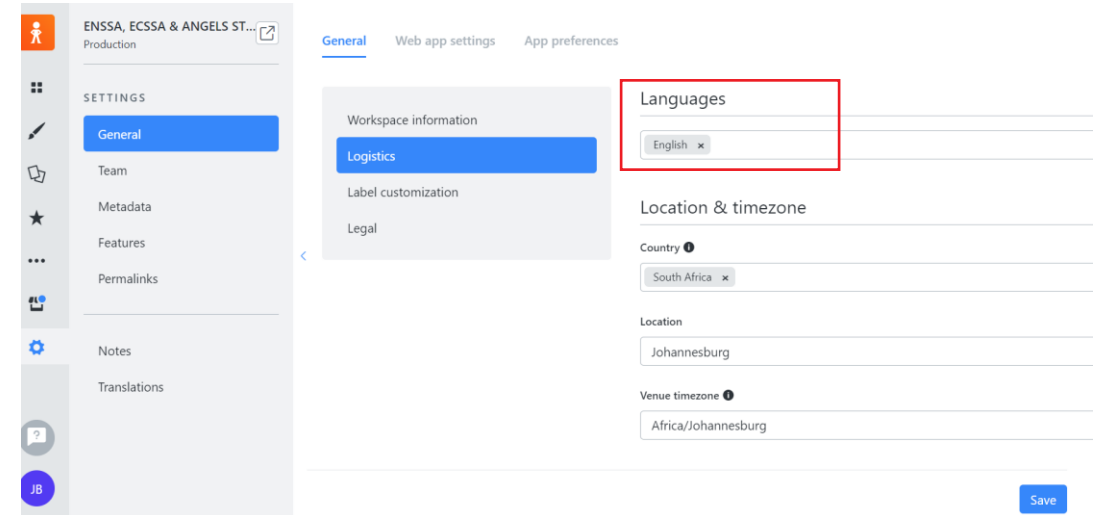
Data location

Get your event started

Step 5a – Settings: Select your language

Got to Settings > General > Logistics and add your language.

Please make sure only your local language has been selected.
Remove English.



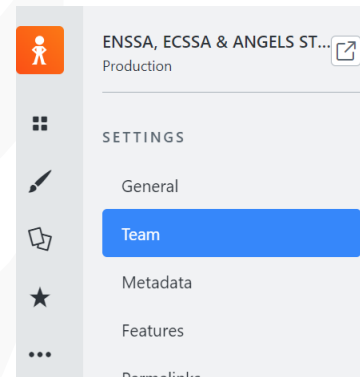
The screenshot shows the ANGEL2 settings interface. On the left, a sidebar contains a 'SETTINGS' menu with options: General, Team, Metadata, Features, Permalinks, Notes, and Translations. The 'General' tab is selected. In the main content area, the 'Logistics' sub-tab is selected under 'Workspace information'. The 'Languages' section is highlighted with a red box and shows 'English' as the selected language. Below this, the 'Location & timezone' section is visible, showing 'Country' as 'South Africa', 'Location' as 'Johannesburg', and 'Venue timezone' as 'Africa/Johannesburg'. A 'Save' button is located at the bottom right of the settings panel.

Get your event started

Step 5b – Settings: Team members

Got to Settings > Team and add marcos@ctlcomms.com as a manager to your team (Click on “Add team member” and enter the email address mentioned). This step is essential since it will allow participants to receive their event certificate upon attendance on the Angels Initiative website on their dashboard under “event certificates”.

Please also **add other relevant team members** (e.g., the responsible Angels Consultant as editor and Core Team Member as manager) here as well.



Team members

Add team member

☐	Full name	Email	Access role
☐	Julia Binkert	julia.binkert@iqvia.com	Manager
☐	Madeline Bucher	madeline.bucher@iqvia.com	Manager
☐	Marcos Duran	marcos@ctlcomms.com	Manager

Get your event started

Step 6 – Create a registration form

- Click 'Content' on the left-hand side of the screen.
- Then click 'Registration' to open up the page shown on the right.

Register the URL:

- Always choose “Public – Open registration”
- Then enter the registration URL. It is recommended to use the event name for the URL (see example in the picture).

After this, press 'Enable Registration' to take you onto the next page.

Attract new users

Enable registration and build your own custom registration page

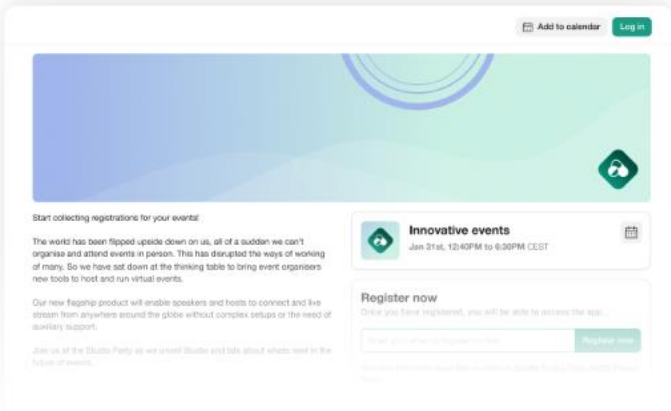
Public - Open registration
Anyone with the registration link may register.

Private - RSVP
Invite specific people and ask them to confirm their attendance.

Public & Private
Combine open registration and personal invitations.

EMSAngelsDayBulgaria **Enable registration**

Page will be available at: <https://webapp.spotme.com/login/angels/EMSAngelsDayBulgaria>



Get your event started

Step 7 – Review the ‘event details’ for registration

Here you will see the chosen registration URL line. If needed, you can edit and adjust it again. Please don't change the registration link any more after sending out invitations.

Make sure to press ‘save’ after making any changes.

Registration

Event details

Form fields

Design

Emails

Settings

Registration page URL

If you change this link, the old one won't work anymore.

webinar-4-post-acute-stroke-care

Page will be available at: <https://webapp.spotme.com/login/angels/webinar-4-post-acute-stroke-care>

Add section +

The event details page does not have any sections: the registration box will be placed in the middle of the screen.

Get your event started

Step 8 – Edit the ‘form fields’ for registration

The form fields for registrations are the fields participants have to fill in during the registration process.

To create the form for the registration, go to ‘form fields’

Please note, first find the correct order in English, the translation of these fields will follow in the [Category translation](#).

- Here you should find the template fields for the form already established (Note they are not in the correct order/not yet selected)
- Please select under ‘add a field’ all the relevant fields for your event
- Drag and drop each field to ensure the form is in the right order and also choose if they should be mandatory or not.
- If you want to edit or add an additional field (that is not in the list), please follow [step 10](#)
- If you want to use conditional fields, please check out the Spotme guide [here](#)

Ensure you press ‘save’ at the bottom of the page.

The screenshot shows the 'Angels TEST 2.0' interface. On the left is a sidebar menu with options: Users, Registration (selected), Speakers, Sessions, Pages, Forms, Documents, Files, Maps, Shortlinks, and Video Library. The main area is titled 'Registration' and contains a sub-menu with 'Event details', 'Form fields' (selected), 'Design', and 'Settings'. Below this is a table of form fields. The table has two columns: 'Field' and 'Mandatory'. The fields listed are 'Accommodation Comments' and 'Business Name / Organization', both marked as mandatory. Below the table is a large text area with a disclaimer: 'Tick to accept that you are aware the recording is being used on the Angels website Hereby the undersigned Healthcare Professional/Healthcare Organization grants his/their consent that the pharmaceutical company Boehringer Ingelheim Pharma International GmbH will disclose any types of fees the health care professional will receive which are subject to the Transfer of Value according to EFPIA definitions. The data collection'. At the bottom of the text area are three buttons: 'Add a field +', 'Add description +', and 'Add a legal document +'. At the very bottom of the page are 'Copy link' and 'Open page' buttons, and a 'Save' button on the right.

Field	Mandatory
Accommodation Comments	☒
Business Name / Organization	☒

Tick to accept that you are aware the recording is being used on the Angels website Hereby the undersigned Healthcare Professional/Healthcare Organization grants his/their consent that the pharmaceutical company Boehringer Ingelheim Pharma International GmbH will disclose any types of fees the health care professional will receive which are subject to the Transfer of Value according to EFPIA definitions. The data collection

Add a field + Add description + Add a legal document +

Copy link Open page Save

Accommodation

If requested, we will organize accommodation for you at the Atrium hotel in Mainz from 26-28 March 2023 according to the meeting schedule and your arrival/ departure date. Please enter your details below:

Form field examples

Will you need Accommodation *

☐ Yes

☐ No

Travel

We will assist you with your flight booking. Please request travel booking assistance and provide the preferred departure airport. We will then contact you via email with a flight proposal for your travel to Frankfurt. Kindly note that if available all flights will be arranged according to the meeting schedule with arrival on 26 March 18:00 and departure on 28 March in the evening after the official end of the meeting.

Get your event started

Step 9 – Edit the ‘description fields’ for registration

The ‘description’ can be used for structuring the registration page by creating titles for the different section and adding descriptive information e.g., for accommodation, travel etc.

- Please click on ‘add a description’ and write the necessary text for title/description already in your local language. Don’t forget to make it bold in case of titles and cursive for descriptions.
- Drag and drop each description/title to ensure the form is in the right order.

You can then preview the registration page by clicking on ‘Open page’ at the bottom of the page.

Ensure you press ‘save’ at the bottom of the page.

The screenshot shows the 'Registration' form editor in the Angels TEST 2.0 system. On the left is a sidebar menu with options: CONTENT, Users, Registration (selected), Speakers, Sessions, Pages, Forms, Documents, Files, Maps, Shortlinks, and Video Library. The main area is titled 'Registration' and contains a sub-menu with 'Event details', 'Form fields' (selected), 'Design', and 'Settings'. The 'Form fields' section displays a list of fields with columns for 'Field' and 'Mandatory'. The fields listed are 'Accommodation Comments' and 'Business Name / Organization'. Below the list is a text area containing a consent statement: 'Tick to accept that you are aware the recording is being used on the Angels website Hereby the undersigned Healthcare Professional/Healthcare Organization grants his/her consent that the pharmaceutical company Boehringer Ingelheim Pharma International GmbH will disclose any types of fees the health care professional will receive which are subject to the Transfer of Value according to EFPIA definitions. The data collection'. At the bottom of the form are buttons for 'Add a field +', 'Add a description +', 'Add a legal document +', 'Copy link', 'Open page', and 'Save'.

Title	Accommodation
Description	<i>If requested, we will organize accommodation for you at the Atrium hotel in Mainz from 26-28 March 2023 according to the meeting schedule and your arrival/ departure date. Please enter your details below:</i> Will you need Accommodation * ☐ Yes ☐ No Travel <i>We will assist you with your flight booking. Please request travel booking assistance and provide the preferred departure airport. We will then contact you via email with a flight proposal for your travel to Frankfurt. Kindly note that if available all flights will be arranged according to the meeting schedule with arrival on 26 March 18:00 and departure on 28 March in the evening after the official end of the meeting.</i>

Get your event started

Step 10 – Add/Edit registration form fields in your metadata in the language of the event (addendum to [step 8](#))

To add new fields that are not in the list provided or edit existing fields on the form you need to add/edit them in the metadata.

- Go to the left menu and select 'settings' and then 'metadata'.
- At the top there will then be a drop down, click on this and select 'user'. You will then see all the form fields from the original list here.

Add new fields:

- Select 'add a new field', scroll to find this new entry.
- You can then edit this field:
 - Change field name 'New_24' (don't use capital letters or space e.g. travel_details, note this field is just for you, please put it in English)
 - 'Choose a new category' in the drop-down, try to select an existing category and only if none matches 'add a category' in English (once a category is selected your field will move under respective category section)
 - Create the 'label' text that will appear on the registration field in your local language
 - Leave 'tooltip' empty
 - Decide on the field kind', usually selected 'choice' or 'text'.

If you wish to edit a field just choose the respective field on the list and edit. Please don't change the field name and only edit the backstage label and field kind.

Once added make sure you press 'save' at the bottom of the screen.

New field

Get your event started

Example registration page

**Train the Trainer Workshop March 2023**
Mar 26 to Mar 28

Complete your profile

All fields marked with * are mandatory

Personal Information

First name *

Last name *

Email address *

Business Name / Organization *

Country *

Speciality *

Gender *

Accommodation

If requested, we will organize accommodation for you at the Atrium hotel in Mainz from 26-28 March 2023 according to the meeting schedule and your arrival/ departure date. Please enter your details below:

Will you need Accommodation *

☐ Yes

☐ No

Travel

We will assist you with your flight booking. Please request travel booking assistance and provide the preferred departure airport. We will then contact you via email with a flight proposal for your travel to Frankfurt. Kindly note that if available all flights will be arranged according to the meeting schedule with arrival on 26 March 18:00 and departure on 28 March in the evening after the official end of the meeting.

Do you require assistance with travel booking *

☐ Yes

☐ No

Please indicate your departure airport *

Dinners

We will organize a Welcome Dinner in the hotel on 26 March and an Offsite Dinner on 27 March. Please indicate if you wish to join.

Welcome/Offsite Dinner *

☐ Yes

☐ No

☐ Tick to accept that you are aware the recording is being used on the Angela's website. Hereby the undersigned Healthcare Professional/Healthcare Organization grants his/her consent that the pharmaceutical company Boehringer Ingelheim Pharma International GmbH will disclose any types of fees the health care professional will receive which are subject to the Transfer of Value according to EFPIA definitions. The data collection complies with the requirements of the EFPIA disclosure code. *

☐ I hereby agree that you may process my data for the completion of participation (accommodation booking, transfer organization, printing material, name badges, sign-in sheets, meal documentation, etc) at this meeting. I am aware that I can revoke this consent in writing at anytime. Hereby the undersigned Healthcare Professional/Healthcare Organization grants his/her consent that the pharmaceutical company Boehringer Ingelheim Pharma International GmbH will disclose any types of fees the health care professional will receive which are subject to the Transfer of Value according to EFPIA definitions. The data collection complies with the requirements of the EFPIA disclosure code. *

Complete registration

Translation

Important information before starting with translations

If you are the first to use SpotMe in your local language and you can't see translated fields yet, please contact the Angels Core Team (angelscoreteam@iqvia.com) to receive an excel file with all necessary translation for standard elements of the registration page and app.

- Enter the translations in your local language in the excel file and send it back to your Angels Team contact. The language translations will be added to the template so that you will have them available for this event and all events hereafter. Once the template and your workspace are ready in your local language you will be informed.

For your registration field translation, please follow [Step 1](#).

In case you find anything that has not been translated, you can use [Step 2](#) for any additional translation changes. Please always let the Angels Core Team know about additional translations, so we are able to add them to the template.

Translation

Step 1 - Form Field Translations

To translate each form field to a given language. Go to 'Settings' on the left of your screen, click 'Metadata' and this page will show.

- **IMPORTANT!** – it is essential to not make any changes to the 1st column.
- Delete the highlighted section in the 2nd column and input translation.
- Use the 3rd column to amend any choices – enter the translation and add using the ‘+’ sign on the far right to add.
- To remove a choice – select on the drop-down list and press the ‘–’ sign

Remember to 'save' after each action in order to not to lose any changes.

Angels TEST 2.0

Test

SETTINGS

General

Team

Metadata

Features

Permalinks

Notes

Translations

provided_email

provided_email

text

Getting started 5/10

Accommodation

Do you need Accomodatic

choice

☐ Yes
 ☒ No

☐ Input is required
 ☐ Fill when empty

Accommodation Commen

Accommodation Commen

text

☒ Input is required
 ☐ Fill when empty

Dinner

offsite_dinner

Offsite Dinner

choice

☐ Yes
 ☐ No

Dinner

tooltip

☒ Input is required
 ☐ Fill when empty

Add a new field

Add a category

Save changes

Translation

Step 2: Other translations (e.g. buttons, calendars, notifications)

Note – if you have provided the excel with translation, most fields should already be translated!

You might find other items on the registration page that need to be translated.

If and when you will need to translate from English.

- Go to settings on the left-hand side of the page
- Click into translations
- Click into search bar and type the exact phrase you would like to translate
- Click on 1. 'Add a language' → 2. select your language → 'save'
- 3. Enter the translated text → 'Save this item'

The screenshot displays the translation management interface. On the left, a sidebar contains a 'SETTINGS' menu with options: General, Team, Metadata, Features, Permalinks, Notes, and a highlighted 'Translations' option. The main content area shows a search bar with the text 'Enter your email to register for free'. Below the search bar, a 'Translations' section is visible, containing a 'REGISTRATION' subsection with a 'Form / email placeholder' entry. To the right, a table titled 'registration.form.email_placeholder translations' shows the current state for English (EN) with the text 'Enter your email to register for free'. Below the table, there are two buttons: 'Save this item' and 'Add a language', with the latter highlighted by a red box. Below this, a 'Select a language' dialog box is open, showing a dropdown menu with 'Spanish' selected, also highlighted by a red box. A 'Save' button is located below the dialog. At the bottom, the same translation table is shown again, but now with a new row for Spanish (ES) that is empty, highlighted by a red box, indicating where the user should enter the translated text. The 'Add a language' button is now disabled.

Registration Design

Got to Content > Registration > Design.

Please keep the general design (e.g. Angels colours) that has been chosen in the template, but feel free to change the banner if there is a more relevant banner for your respective event.

Registration

Event details

Form fields

Design

Emails

Settings

Customize your registration page

Primary color

#75C445

Text color

#FFFFFF

Add to calendar buttons

Control the visibility of calendar button during registration

☒ Show Add to calendar buttons

Event dates

Control the visibility of the event dates during registration

☒ Show dates

Banner

File types: PNG, JPEG. Max file size 10MB. Recommended resolution 2880x692.

Footer

Footer will be visible just in the landing page. 160 characters max. length.

☐ Show footer

Landing page

Form

Login

GIVING *life* A CHANCE.





Emails

Types of emails and communication flow

Angels Meetings (f2f events)	Angels Virtual Events	Description
1. Invitation Email	1. Invitation Email	Will be set up in Active Campaign to have a standardized design (see Angels Active Campaign Manual). For open webinars it can also be send via Active Campaign to the relevant website users. For closed events with invitee lists, the designed email must be sent through the consultant or agency.
2. Angels Registration Confirmation	2. Angels Registration Confirmation / Access event email / Unknown account email	Will be set-up in SpotMe. Further instructions will follow in the next slides. These emails will need to be set up before the registration page goes live.
3. Before you leave email	3. Angels Virtual Event Countdown emails	Will be set-up in SpotMe. Further instructions will follow in the next slides. These emails are to be sent shortly before the event starts and can therefore be done at a later stage.

Emails

Step 1: Registration confirmation Email

- Go to Design > Emails
- Open the 'Angels Registration Confirmation' email
- Translate subject and email text to your local language (do not translate integrated fields tagged to your registration fields e.g. **First name** **Last name** ,
- Amend the integrated fields tagged to your registration fields (e.g. delete fields that are not covered in your registration form, reconnect new fields, amend wordings)
- Change the sender's name ("From") to: "Meeting Name Month Year" <event-management@spotme.com> , e.g. Angels Day Spain March 2024

Note that the "View the Event here" button will lead to your web app account. If you are not going to use the web app, delete the button (choice only possible for f2f events).

See the 'Angels SpotMe App Manual' to see the instructions how to set up the app.

The screenshot displays the 'Angels Days - Template' editor interface. On the left, a sidebar menu shows 'Design' with sub-items: Home, App menu, Theme editor, and Emails (highlighted). The main area is titled 'Emails' and contains a table of email templates. The table has columns: Name, Subject, Last modified, and Status. One template is listed: 'Angels Registration Confirmation' with subject 'Angels Event Confirmation', last modified '2023-02-22 19:26:28', and status 'ACTIVE'. Below the table, there are input fields for 'Name' (Angels Registration Confirmation), 'From' (Angels Day Spain March 2024 <events-management@spotme.com>), and 'Subject' (Angels Event Confirmation). An 'Active' toggle switch is also present. The 'Email editor' section shows a preview of the email template. The preview includes a header image with the text 'GIVING life A CHANCE.' and the Angels logo. Below the image, the text reads: 'Dear **First name** **Last name** ,', 'Thank you for submitting your registration for **Event Name** .', and 'Your details have been recorded and we look forward to welcoming you soon! Please check your details below and inform us of any changes.' At the bottom of the preview is a green button labeled 'View the Event here'. To the right of the preview is a sidebar with various content blocks: COLUMNS, HEADING, TEXT, BUTTON, IMAGE, DIVIDER, and USER QR. At the bottom of the editor, there are buttons for 'Copy template', 'Paste template', and 'Save'.

Name	Subject	Last modified	Status
Angels Registration Confirmation	Angels Event Confirmation	2023-02-22 19:26:28	ACTIVE

Name: Angels Registration Confirmation

From: Angels Day Spain March 2024 <events-management@spotme.com>

Subject: Angels Event Confirmation

Active: ☒

Email editor

GIVING life A CHANCE.

Dear **First name** **Last name** ,

Thank you for submitting your registration for **Event Name** .

Your details have been recorded and we look forward to welcoming you soon! Please check your details below and inform us of any changes.

View the Event here

Copy template Paste template Save

Emails

Step 2: Access event email (only virtual events)

- Go to Design > Emails
- Open the 'Angels – Access event' email
- Translate subject and email text to your local language (do not translate integrated fields tagged to your registration fields e.g. 'First name' 'Last name', 'Event name')

Note that the “Go to event name” button will lead to your web app account. The link is personalized for each of the users. Do not change.

See the 'Angels SpotMe App Manual' to see the instructions how to set up the app.

Templates Mailings Logs

New template

Search

☐	Name	Subject	Last modified	Status
☐	Angels - Before you Leave	Before you Leave	2023-04-11 11:36:03	ACTIVE
☐	Angels – Access event	👉 Your access to {{[_event_name]}}	2023-03-07 11:01:26	ACTIVE
☐	Meeting cancellation	Cancelled meeting: {{[meeting_title]}}	2023-03-15 12:34:30	ACTIVE
☐	Meeting invitation	Invitation: {{[meeting_title]}}	2023-03-15 12:34:30	ACTIVE
☐	Meeting invitation update	Updated invitation: {{[meeting_title]}}	2023-03-15 12:34:30	ACTIVE
☐	Angels Registration Confirmation	Angels Event Confirmation	2023-04-11 11:42:57	ACTIVE

All pages loaded

Name: Angels - Access event ☐ Active

From: Angels Events <noreply@spotme.com>

Subject: 👉 Your access to {{[_event_name]}}

Email editor

GIVING life A CHANCE. angels

Dear {{[fname]}} {{[lname]}},

Use the link below to access Event Name

Go to {{[_event_name]}}

Don't forward or share this email with others, it contains your personal access link.

If you did not request access to this event, you can safely ignore this message. Only people with access to your email can click the link above.

If you need support, contact us [here](#)

This email was sent to you by SpotMe

[Privacy Policy](#) - [Unsubscribe](#)

Content

Blocks

Body

COLUMNS

HEADING

TEXT

BUTTON

IMAGE

DIVIDER

Emails

Step 3: Unknown account email (only virtual events)

- Go to Design > Emails
- Open the 'Angels- Unknown account' email
- Translate subject and email text to your local language (do not translate integrated fields tagged to your registration fields e.g. 'First name' 'Last name' **First name** **Last name** ,

Note that the “Register for event name” button will lead to your registration page.

Templates Mailings Logs

New template Search

☐	Name	Subject	Last modified	Status
☐	Angels - Unknown account email	Register - {{_event_name}}	2023-04-11 11:46:59	ACTIVE
☐	Angels Virtual Event Countdown (1 week to go)	One week to go until {{_event_name}}	2023-04-11 11:56:15	ACTIVE
☐	Angels Virtual Event Countdown (Day of the event)	See you today for {{_event_name}}	2023-04-11 11:56:38	ACTIVE
☐	Meeting cancellation	Cancelled meeting: {{meeting_title}}	2023-03-15 12:34:13	ACTIVE
☐	Meeting invitation	Invitation: {{meeting_title}}	2023-03-15 12:34:13	ACTIVE
☐	Meeting invitation update	Updated invitation: {{meeting_title}}	2023-03-15 12:34:13	ACTIVE
☐	Angels - Access event	Your access to {{_event_name}}	2023-04-11 11:46:14	ACTIVE
☐	Angels Registration Confirmation	Angels Event Confirmation	2023-04-11 11:45:34	ACTIVE

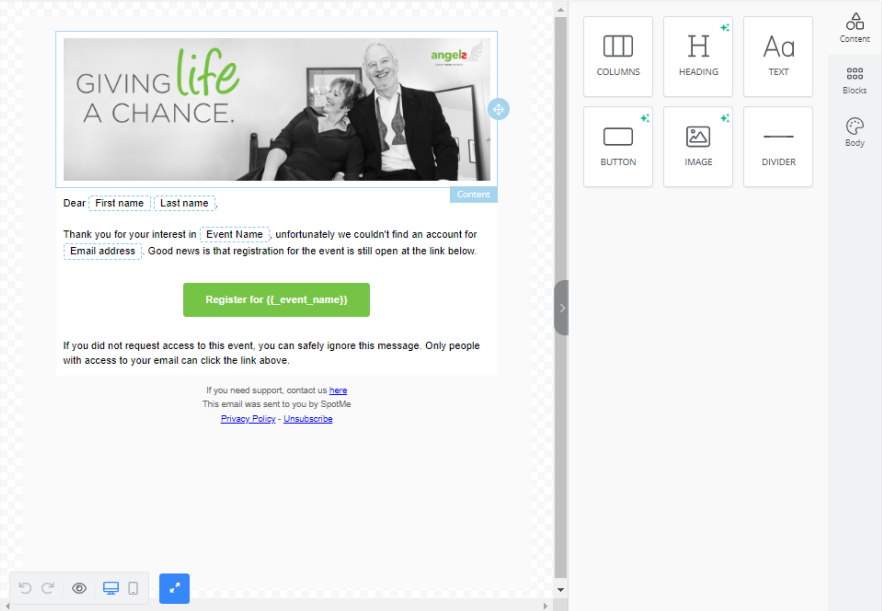
All pages loaded < 1 >

Name
Angels - Unknown account email Active

From
Angels Events <noreply@spotme.com>

Subject
Register - {{_event_name}}

Email editor



Emails

Step 4a: Before you leave email (f2f events)

- Go to Design > Emails
- Open the 'Angels - Before you leave' email
- Translate subject and email text to your local language (do not translate integrated fields tagged to your event e.g. **Event Name**)
- Amend the text with information for your event (e.g. delete information you don't need, add information you need, adjust contact/location/time details)
- Change the sender's name as in Step 1

Templates Mailings Logs

New template

Search

☐	Name	Subject	Last modified	Status
☐	Angels - Before you Leave	Before you Leave	2023-04-11 11:36:03	ACTIVE
☐	Angels - Access event	🔑 Your access to {{_event_name}}	2023-03-07 11:01:26	ACTIVE
☐	Meeting cancellation	Cancelled meeting: {{meeting_title}}	2023-03-15 12:34:30	ACTIVE
☐	Meeting invitation	Invitation: {{meeting_title}}	2023-03-15 12:34:30	ACTIVE
☐	Meeting invitation update	Updated invitation: {{meeting_title}}	2023-03-15 12:34:30	ACTIVE
☐	Angels Registration Confirmation	Angels Event Confirmation	2023-04-11 11:42:57	ACTIVE

All pages loaded < 1 >

Dear All,

We hope you are doing well.

We are looking forward to welcoming you to the **Event Name**, to be held at the **LOCATION & DATE**.

Please find the agenda attached and important logistical information below, which we recommend to read carefully before travelling to **LOCATION**.

Travel to Mainz
Your flight has been booked and the tickets have been sent to you directly by our organization team. If you have any questions regarding your tickets, please contact **CONTACT** at +49 172 61 99 208 or angels@oureperfection.com

Airport Transfer
Your arrival and departure transfers from the airport to the hotel and return have been arranged for you according to your travel schedule. Please make sure to exit via the baggage claim area. After leaving the baggage claim area, you will see Café Kimbo opposite your exit (exit A2). Your driver is waiting for you with an "Angels" sign. If your flight is delayed, cancelled or rerouted, or you have difficulty locating your driver, please contact **CONTACT** at +49 172 61 99 208. Thank you!

Hotel
LOCATION

Check-out: 11 am

Columns Heading Text Button Image Divider

Content Blocks Body

Emails

Step 4b: Event countdown emails (Virtual event)

- Go to Design > Emails
- Open the 'Angels Virtual Event Countdown' emails
- Translate subject and email text to your local language (do not translate integrated fields tagged to your registration fields e.g. **First name** **Last name** ,
- Change the sender's name as in Step 1

Note that the "View the Event here" button will lead to your web app account.

See the 'Angels SpotMe App Manual' to see the instructions how to set up the app.

Templates Mailings Logs

New template

countd

☐	Name	Subject	Last modified	Status
☐	Angels Virtual Event Countdown (1 week to go)	One week to go until {{_event_name}}	2023-04-11 11:56:15	ACTIVE
☐	Angels Virtual Event Countdown (Day of the event)	See you today for {{_event_name}}	2023-04-11 11:56:38	ACTIVE

All pages loaded < 1 >

Templates View template Mailings Logs

Name: Angels Virtual Event Countdown (1 week to go) Active

From: Angels Events <noreply@spotme.com> Subject: One week to go until {{_event_name}}

Email editor

GIVING life A CHANCE.

Dear **First name** **Last name**,

We are excited to welcome you to **Event Name** taking place next week.

If you haven't done yet, please make yourself familiar with the event by using the link below:

[View the Event here](#)

Don't forget to save the event to your calendar!

[Add to calendar](#)
[Add to Google Calendar](#)

See you next week!
Kind regards in behalf of the Angels Initiative

For the best viewing experience, please use the latest version of Google Chrome, Firefox or Safari. If you have any audio issues, please check you are using the latest version of a supported browser. [Learn more](#)

If you need support, please get in touch with your event contact.

This email was sent to you by SpotMe
[Privacy Policy](#) - [Unsubscribe](#)

Registration Emails

Once everything is ready to go live, go to Registration > Emails and check that the Emails are correctly assigned:

- Registration confirmation email: Angels registration confirmation
- Access event email (only needed for Virtual events): Angels – Access event'
- Unknown account email (only needed for Virtual events): Angels- Unknown account

Registration

Event details

Form fields

Design

Emails

Settings

Customize which emails are sent automatically by SpotMe to attendees when they are registering or accessing the event. You can modify the built-in templates or choose your own below.

Open registration confirmation email ▼

Email sent to attendees to confirm that their registration was successfully submitted.

Default Email

Angels Registration Confirmation ▼

[+ Send a different email to specific target group](#)

Login email >

Unknown account email >

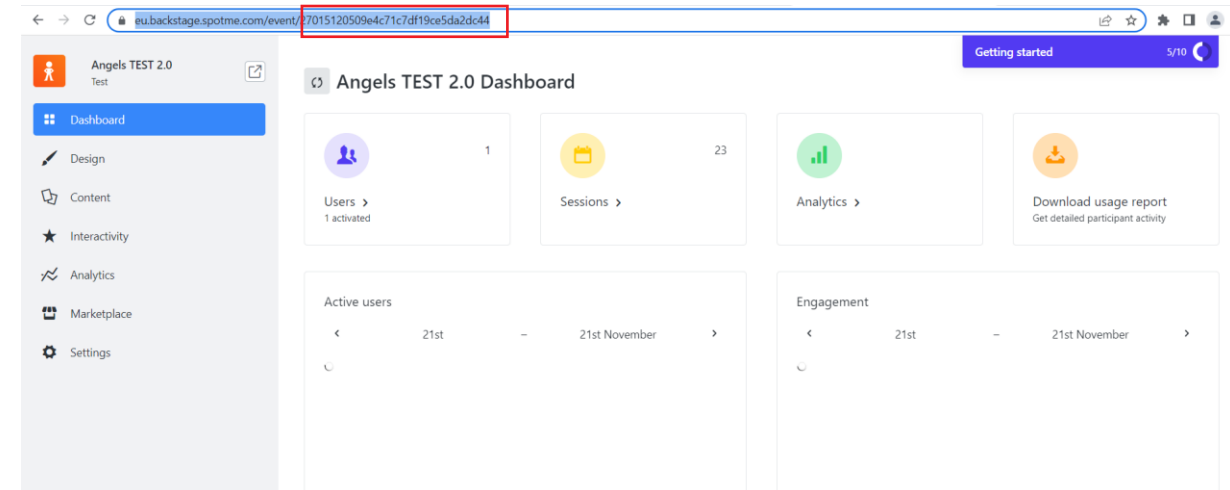
SpotMe EID/registration URL for Angels website landing page

SpotMe EID

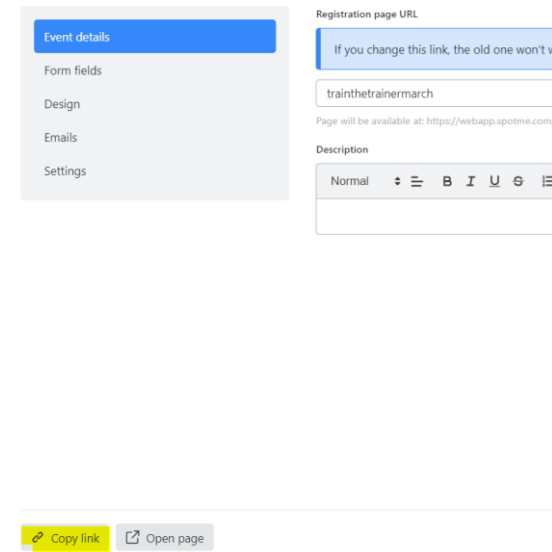
- To retrieve your spot me ID, go to the dashboard of your event.
- Click on the URL in the top of your screen and copy the numbers and letters that appear after 'event/'.
- Insert the SpotME EID in the respective field on the Angels website landing page in the 'Edit' section.

Registration URL

- Click 'Content' on the left hand side of the screen.
- Then click on 'Registration'.
- Copy the registration link by clicking on 'Copy link' at the bottom of the page and paste it in the 'Registration URL' field on the Angels website landing page.



Registration



Before going live: set event to production mode if app will be used

Before going live with the registration, please make sure you have tested the registration (and web app if applicable) and set the workspace into production mode, if you would like to use the app.

If the app should not be visible for participants, leave it in pre-production mode.

- Go to Settings > General > Workspace information.
- Change the production status to 'Production workspace' / leave it in 'Pre-Production Mode' according to your needs

The screenshot displays the 'Workspace information' settings page. At the top, there are tabs for 'General', 'Web app settings', and 'App preferences'. The 'General' tab is active. On the left, a sidebar lists 'Workspace information' (highlighted), 'Logistics', 'Label customization', 'Legal', and 'Attendance criteria'. The main content area is titled 'Workspace data' and includes the following fields:

- Workspace name:** Gauteng South Nurses Regional Workshop
- Starts:** 2024-03-08 08:30
- Ends at:** 2024-03-08 14:30
- Production status:** Preproduction workspace (indicated by a yellow highlight)
- Container app:** Angels Events (angels)
- ☒ Hide from other apps
- Organization:** Boehringer Ingelheim - Angels

Below these fields is a 'Templating' section with a message: 'This workspace is based on template: Angels Meetings - Template (Boehringer Ingelheim - Angels)'. At the bottom, there is a 'Create a Template from this workspace.' link and a 'Create template' button. A 'Save' button is located at the bottom right of the page.

See the 'Angels SpotMe App Manual' to see the instructions how to set up the app.

Close registration on SpotMe

If you reach your capacity on SpotMe, you can close the registration on Spotme (please also ask the Angels Team to close the registration on the event landing page on the Angels website).

To close the registration in SpotMe:

- Go to Content > Registration > Settings
- Disable the Access limitation 'Allow attendees to self-register to the event'

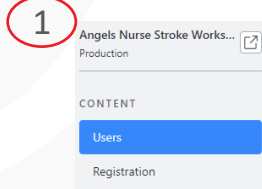
Registration

The screenshot shows the 'Registration' settings page. On the left, a sidebar lists 'Event details', 'Form fields', 'Design', 'Emails', and 'Settings' (which is highlighted). The main content area has three tabs: 'Public - Open registration' (selected), 'Private - RSVP', and 'Public & Private'. Below the tabs, the 'Access limitation' section is highlighted with a red box. It contains a toggle switch for 'Allow attendees to self-register to the event', which is currently turned off. Below this toggle are three other settings: 'Set registration capacity' (disabled), 'Allow attendees to update their profile information' (disabled), and 'Allow attendees to log in to the event app' (enabled). At the bottom, there are five expandable sections: 'Authentication', 'Manual approval', 'Allowed email domains', and 'Organizer notifications', each with a right-pointing arrow.

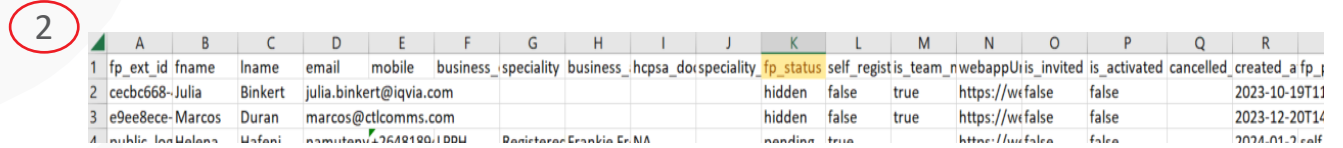
If you would like to set a capacity limit for the event, please check out the SpotMe guide [here](#).

Post Event: Change the attendee status to active or cancelled

1. Go to > Content > User and download the user report excel

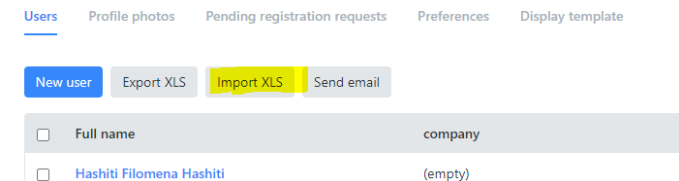
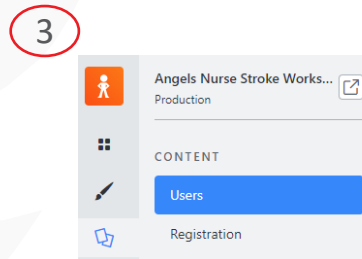


2. Open the excel and change the 'fp status' to either "active" or "cancelled" for all users according to their event attendance. Then save the excel locally on your computer

A screenshot of the top navigation bar of the 'Angels Nurse Stroke Works...' application. The 'Export XLS' button is highlighted in yellow. Other buttons include 'New user', 'Import XLS', and 'Send email'. Below the buttons, there is a table with columns for 'Full name', 'company', and 'Registrat'.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	fp_ext_id	fname	lname	email	mobile	business	speciality	business	hcpsa_dor	speciality	fp_status	self_regist	team_nwebapp	uris_invited	is_activated	cancelled	created_a	fp_i
2	cecbc668	Julia	Binkert	julia.binkert@iqvia.com							hidden	false	true	https://w	false	false		2023-10-19T11
3	e9ee8ece	Marcos	Duran	marcos@cticomms.com							hidden	false	true	https://w	false	false		2023-12-20T14
4	public	Los Angeles	Hashiti	hashiti@angelsinitiative.com	21642190	100	Registrar	Franklin	Er	MA	pending	true		https://a	false	false		2024-01-2

3. Go back to the User tab in your event workspace and import the excel list you have just saved



This step is very important since it defines who of the participants will receive their event certificate on the Angels Initiative website on their dashboard under "event certificates" (only participants with status set to "active" will receive a certificate). Please **complete this step within 5 Days after the event ended.**

Q&A

Any question you may have, please
submit to angelscoreteam@iqvia.com.



LEAVE YOUR LEGACY