## Show Creation

Welcome to ExpoTrac! Here’s how you create a show: Once you log in to your dashboard, you’ll see a small menu with a few items. At the top of the list, you’ll see "Shows." Click on "Shows," and in the top right corner, you’ll see a "New Show" button that you’ll want to click.

## Pricing Tiers

You’ll then be prompted to input a show title, as well as a start and end date. Next, you’ll want to select pricing tiers, decide the number of tiers, give each tier a title, and set end dates for each tier. This is especially important if you have an early bird pricing tier and a late pricing tier. For early bird pricing, be sure to set the date, but also set the time. ExpoTrac uses military time, so if you want your early bird pricing to end on 12/9/25, make sure the time is set to 23:59 (11:59 PM). This ensures that tier 1 ends at the end of the day, rather than at 12 AM on the specified early bird date.

After setting your tiers and timing, click on "Create" at the bottom. After doing so, you’ll be taken to the overview page for your show, where you can track simple stats such as total registrants, registrants in the last 30 days, or last week.

## Field Options

From this page, head back to the settings page. Now it’s time to build your field options. Field options are important for two reasons: If your show doesn’t need a registration form and you plan to upload registrants manually, this is where you’ll develop your import template.

You can select or deselect fields depending on your show’s requirements.

Click on the "Field Options" tab. You’ll then see a number of options with checkboxes next to them. Here, you can determine which fields are necessary for your registrants. You’ll also see the ability to add a custom field.

## Custom Fields

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

## Import Options

Once you’re satisfied with the field options and any custom fields, you can now build your import template. When you see the template fields section, simply select a field from the drop-down list.

Once a field is selected, more options will appear, including any custom fields you've created. Always be sure to save your changes by clicking the light blue "Save Changes" button.

## Registration Types

Now it's time to create your registration types. Remember those pricing tiers you created earlier? This is where they come in handy. Once you click on "Reg. Types," you can now create the different registration types that correspond to your event. For example, if your event has a regular attendee ticket, create that one first. You can also set the pricing for that specific type.

After setting your prices per tier, make sure the registration type is active. You'll want to set an expiration date for different registration types. This is extra useful, should you have multiple registration types with different expiration dates on their pricing tiers. If you'd like discounts to apply, ensure both toggles are turned on. You can then click "Create" and proceed to create your second registration type. Afterward, you can add registration options.

## Registration Options

Once your show is active, you'll see another section of the dashboard called "Registration Options." Here, you can create discount registration options or attach separately ticketed classes/sessions to your registrants. For example, if some attendees sign up for a Continuing Education course while others decline, you can track who is attending by assigning them the specific code.

Like custom fields, registration options must be created before you import registrants. Let's name your code "CE Course." For the Type section, input whatever corresponds to the option you're creating. For the Title, you can name it whatever you like. You can also set a price for the course or leave it at $0.00. Once you're done, 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, or a "1" or "0" designation.

You can control whether your registration options are active and whether discounts apply with the toggle buttons.

## Badge Creation/Editing

In the "Badges" section of the dashboard, you will be able to access four styles of badges. You can duplicate these styles and add some customization. There are a few important pieces of information 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, but if you think the spacing is too much or too little, you can adjust it. You must click "Save" to see how the changes will appear.

- **Horizontal Position**: This controls how the text, image, or barcode is displayed across the name badge. You have three alignment settings that can help you left, center, or right justify the text.

- **Vertical Position**: Similar to horizontal positioning, the vertical position controls the placement of text, barcode, or images along the vertical axis. This is more useful when adding additional custom text or images to the badge.

At the bottom of the name badge builder, there is a button that lets you add an additional badge line. Here, you can add more registrant info, custom text, a barcode, or an image with four appearance options. Once you add your field, adjust its position to your liking. You can also make quick adjustments to the vertical position of the additional field by clicking on the up and down arrows in the section's right corner and dragging it into place.

We've preloaded a few stock templates, which you can customize to suit your needs if you'd like to skip the process of building a badge from scratch.

It's also important to note that multiple badges can be created within the same show. If you remember, when creating your registration types and options, you had the ability to select a badge override. Since badges weren't created yet, we couldn't select one, but that will change once you create your badges.

## Badge Images

To upload an image, click "Add to Badge Lines." Pay attention to the image specifications. Only PNG, JPG, and GIF images are accepted, and images with white backgrounds are recommended, as transparent background images may lead to unexpected results.

To upload, browse your files, select the image you want, and click "Save" to see how it looks in the preview. Once you create your first badge, you can create a second badge override for a specific registration type or option. For example, if you added a barcode to your second badge, it will appear differently from the first one.

To apply this override, go to the corresponding registration type or option, click "Edit," and select the badge you want to associate with that registration type or option.

## Form Creation

Before we dive into form creation, it's important to understand that a show must be created first, and you must set pricing tiers and options before creating a form. This is true even if your event does not involve paid tickets.

Also, remember to set a close date for your forms. Forms will be closed once a show is archived.

To create a form, after creating your show, click on the "Form" section in the list of tools. Click the "New Form" button in the top right corner. After you click on it, you can name your form and select the registration types. You'll also want to make sure your credit card processor is out of testing mode and in production mode. CC processing will default to testing mode until you make it live.

Once all of your information is entered, click the "Create" button at the bottom. You can add multiple registration types to a form if you'd like. After clicking "Create," this will open up a tab of options for further customization. Through each tab, you can select the registration fields you want to include or that you deem necessary for registration.

You can also add any registration options that were created. Terms and Conditions are now available, and you can link to an existing Terms and Conditions page if you have one.

In the "Templates" section, you can customize the text for the Welcome Page, Completion Page, and Form Closed Page. The "Emails" section allows you to customize confirmation emails and add additional email addresses at the administrative level.

The "Styling" section lets you make your forms unique and eye-catching. Be sure to follow the image sizing guidelines; if your images don't match the requirements, they will fail to upload. You can also adjust the colors for the Hero Background, Hero Text, Headings Background, Headings Text, Button Background, and Button Text.

Once you've styled your form, save your changes before navigating between tabs. To see how your form looks, click the "Open" icon in the top right corner.

Now that you've created your first form, you can follow the same steps to create a second form, adding another registration type and option. Each form created will have its own unique link. You can copy this link directly from the form preview in your browser.

## Discount Creation

To create a discount, select the "Discounts" tab on the side. Then click the "New Discount" button in the top right. You'll be able to add the discount code, title (as it will appear in your list of discounts), and set a usage limit (if applicable). If there is no limit, simply leave the section blank.

You can designate whether you want the discount code to apply to registration types and options or just to types or options. You can also select the type of discount you are creating: percentage off, fixed amount off, or tracking purposes only.

Next, select the forms you want to attach your discount to. For example, if you're offering 25% off, you can set a maximum dollar amount to be discounted. Once you select the forms, click "Create."

After the discount is created, you can continue to manage which forms the discount is attached to. You can detach it from a form or attach it to a different one. To attach it to multiple forms at once, use the "Bulk Attach" option.

It's always a good idea to test your code. Simply open any forms that should have the discount applied and fill out test information. When you proceed to the next page, input the discount code and click "Apply." The amount should adjust to reflect the discount. If the registration cost is zero, registrants can simply click "Register" and receive an email confirmation.

### Importing Registrants

The next method of uploading registrants is ideal for batch uploads. Remember the template you created when you set up your show? Here's where that comes in handy. Note that all fields marked as required must be included in your import template. Failure to do so will result in an upload error.

To import a batch of registrants, go to the registrants section of ExpoTrac, click on the three dots next to the "New Registrant" button, and select "Import Registrants." This will open a new prompt. Download the required Excel template by clicking "Excel Template."

After downloading the template, fill in the attendee information and save it. Once your Excel template is ready to upload, go back to ExpoTrac and import the file using the drag-and-drop or browse options.

If the upload is successful, all your registrants will appear in the registrants section of your dashboard. You'll also receive an email confirming whether the import was successful or if there were errors.

You can upload additional registrants by selecting the "Append New Registrants" option, which ensures that no previous registrants are deleted. This is the default option, and we recommend always using it.

## Setting Up Printnode On Your Device

Printnode is the technology that connects your printer to Expotrac. You can download the software by visiting (https://app.printnode.com/download/client/expotrac/osx for Mac users or https://app.printnode.com/download/client/expotrac/windows for Windows users). 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 PrintNode's Download Page. 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. These instructions, however, will vary for Mac OS users vs PC users.

Mac users should follow these guidelines for setting up a RAW printer when adding a printer to their system. It should NOT be added through normal printer setup on Mac devices. PC users may follow the instructions below.

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 Expotrac 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 Expotrac dashboard as well.

### CC Processors

To connect your credit card payment gateway, the steps are simple. Click on the "CC Processors" section in your left-side tab, and then click the "New CC Processor" button at the top right. You'll need to fill out four sections: name the payment method, select the type of processor, and enter your API Login ID and API Transaction Key.

Each form has a CC Processors section where you will select the processor you're using and make sure payments are out of testing mode to receive payments.

### Payments

The "Payments" tab on the left allows you to track every payment made at the show level. You can track when payments were made, who made them, and some information about the payment method used.