



Build a Native Event Ticketing and Check-In System with Account Engagement



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THE SPOT
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FIONTA



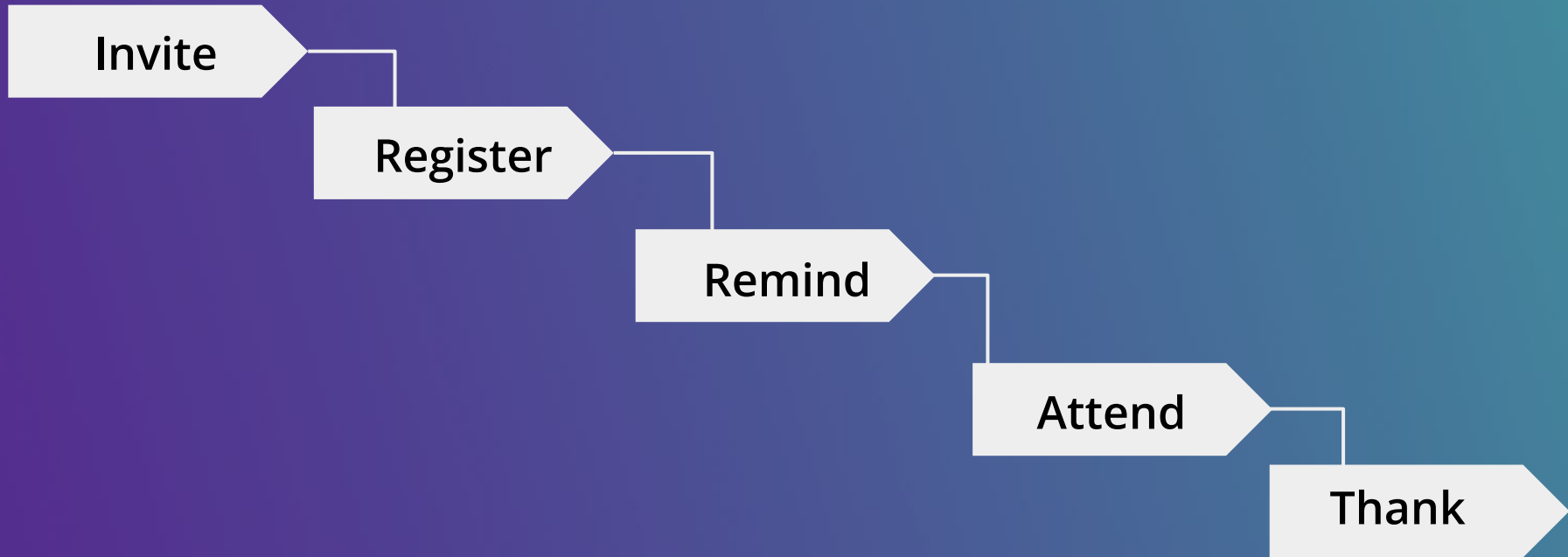
**In-Person Events are
Back, Baby!**

Agenda

- The Process
- The Elements
- The Pre-Event
- The Check-In
- The Post-Event



The Event Process



Elements


- Salesforce Campaign with Multiple Member Statuses
- Invitation Strategy
- Registration Form
- Confirmation Email with Ticket
- Ticket Form Handler(s)
- Reminder Engagement
- QR Code Check-In Method
- Thank You Engagement



Pre-Event



Start with a Salesforce Campaign!

 Campaign Member Statuses (4) New Change Default Status

Member Status	Is Default	Responded	Last Modified Date	
Attended	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/10/2023 4:47 PM	▼
Connected	<input type="checkbox"/>	<input type="checkbox"/>	10/10/2023 4:49 PM	▼
Invited	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/10/2023 4:48 PM	▼
Registered	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/10/2023 4:48 PM	▼

[View All](#)

- Invited to Registered
- Registered to Attended
- Registered / No Show

Invite Some People to Register

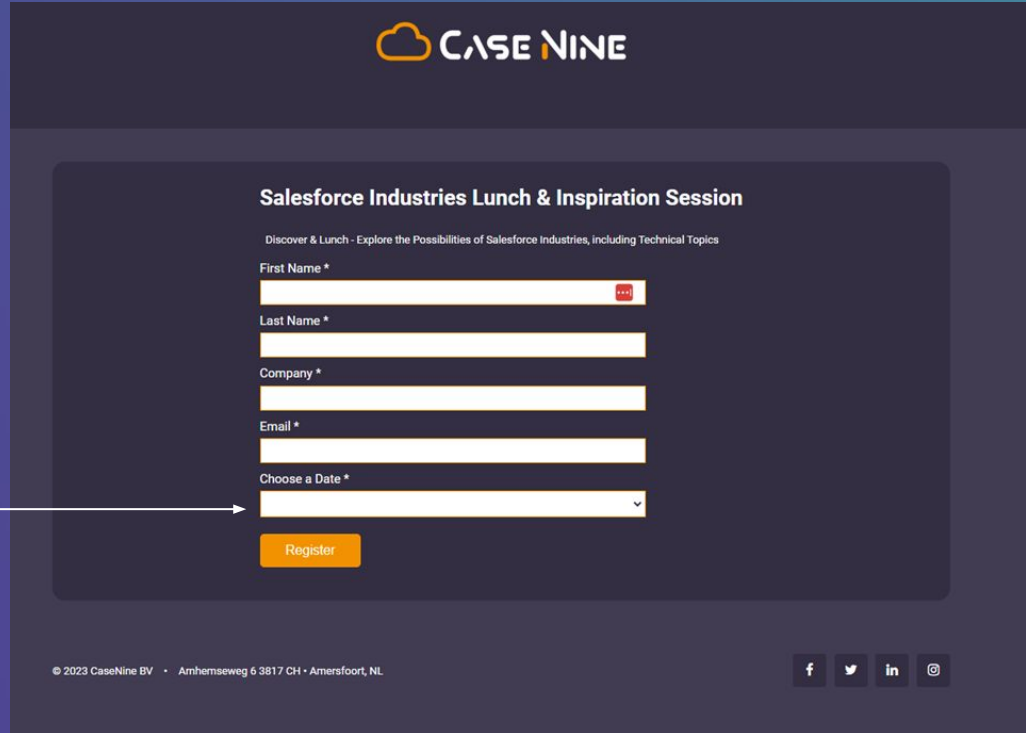
- List Emails
- 1:1 Emails from Sales Team
- LinkedIn Direct Messages
- Social Posts
- Promo on Autoresponders for other forms
- Engagement Studio
- Signature Block Images with Custom Redirects



Give People a Way to Register

A form can be its own
Landing Page, just use
the address!

Option for multiple
dates/sessions



CASE NINE

Salesforce Industries Lunch & Inspiration Session

Discover & Lunch - Explore the Possibilities of Salesforce Industries, including Technical Topics

First Name *

Last Name *

Company *

Email *


Choose a Date *

Register

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[f](#) [t](#) [in](#) [@](#)

Flex Field for Session Date(s)

 **Focus Session**

Contents







Name	Focus Session
Field ID	Focus_Session
Field API Name	Focus_Session__c
Type	Dropdown
Default Mail Merge Value	
Values	
salesforce.com Field Name	
Record Multiple Responses	



Flex Field for Multiple Dates

Values

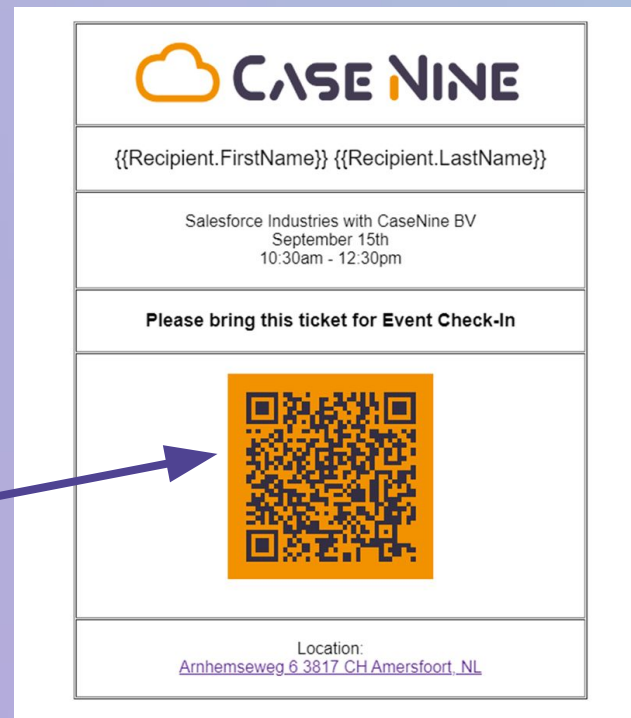
Prefill with

	Stored Value	Form Label	Add to this List
<input type="checkbox"/> 	<input type="text" value="15"/>	A 10:30 AM - 12:30 PM Frid: 	<input type="text" value="Sept 15 Signups"/> <input type="button" value="Choose"/> Clear
<input type="checkbox"/> 	<input type="text" value="22"/>	A 10:30 AM - 12:30 PM Frid: 	<input type="text" value="Sept 22 Signups"/> <input type="button" value="Choose"/> Clear
<input type="checkbox"/> 	<input type="text" value="29"/>	A 10:30 AM - 12:30 PM Frid: 	<input type="text" value="Sept 29 Signups"/> <input type="button" value="Choose"/> Clear



Send a Confirmation Email with a dynamic QR Code as the “ticket”

This QR is dynamically
generated on the fly
according to the
recipient.





Create a Form Handler for our Check-In QR Code

Form-Handler-As-Link Technique
Rendered as QR code...

Must be Kiosk Mode!
Think about Success & Failure locations...



Name	Salesforce Industries CheckIn
Folder	Uncategorized / Form Handlers
Campaign	Salesforce Lunch and Inspiration Session
Tracker Domain	Current Primary (https://info.casene.com)
Endpoint URL	http://info.casene.com/1/1007292/2023-07-27/qvw7 <input type="button" value="http"/> <input type="button" value="https"/>
Success Location	https://casene.com/registration-success/
Error Location	https://casene.com/scan-failed/
Kiosk/Data Entry Mode	<input checked="" type="checkbox"/>
Tags	
Created At	Jul 27, 2023 9:50 PM
Updated At	Aug 16, 2023 9:17 PM
Created By	Bill Fetter
Updated By	Bill Fetter

Completion Actions

Conditional Parameters	If [Prospect custom field] [Focus Session] [is] [22]
Add to CRM Campaign	Salesforce Lunch and Inspiration Session - Checked In Sept 22
Add to list	Sept 22 CheckIn
Conditional Parameters	If [Prospect custom field] [Focus Session] [is] [15]
Add to CRM Campaign	Salesforce Lunch and Inspiration Session - Checked In Sept 15
Add to list	Sept 15 CheckIn
Conditional Parameters	If [Prospect custom field] [Focus Session] [is] [29]
Add to CRM Campaign	Salesforce Lunch and Inspiration Session - Checked In Sept 29
Add to list	Sept 29 CheckIn

Form Field Mappings

External Field Name	Field
f	Custom Field: Focus Session
e	Default Field: Email (r)

Create a QR Code ([Quickchart.io](https://quickchart.io))

https://info.casene.com/l/1007292/2023-07-27/qvw7?e={{Recipient.Email}}&f={{Recipient.Focus_Session}}

Build your own QR code

QR data (text or URL)

Size (px)

Margin (blocks)


Color (foreground)

Color (background)

Error correction

Format

Logo URL



https://quickchart.io/qr?text=https%3A%2F%2Finfo.casene.com%2F%2F1007292%2F2023-07-27%2Fqvw7%3F%3D%7B%7BRecipient.Email%7D%7D%26%3D%7B%7BRecipient.Focus_Session%7D%7D&light=f39200&dark=332e41&size=200

Don't use this URL in your Email!



Create a QR Code ([Quickchart.io](https://quickchart.io))

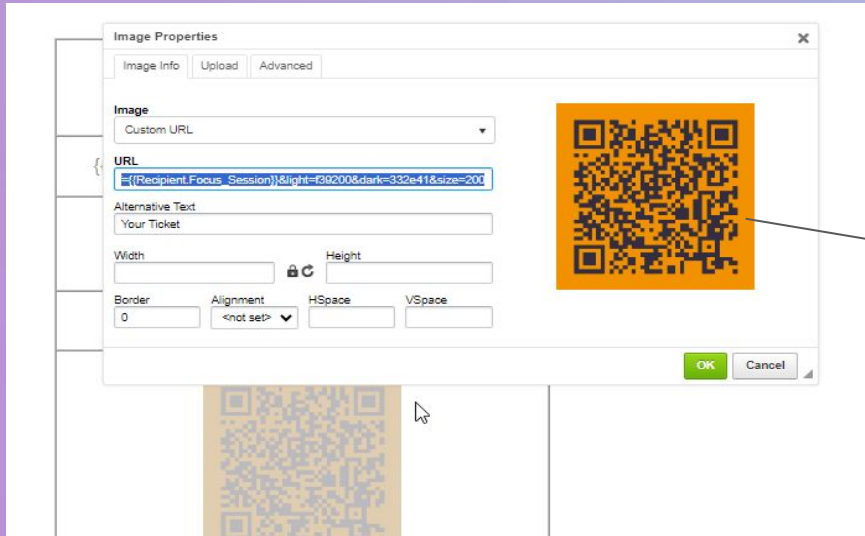
API URL

`https://quickchart.io/qr?text=https://info.casenine.com/l/XXXXXXXX/2023-07-27/qvy7?e={{Recipient.Email}}&f={{Recipient.Focus_Session}}&size=200`

Size & Color variables



Render the URL as an *IMAGE*

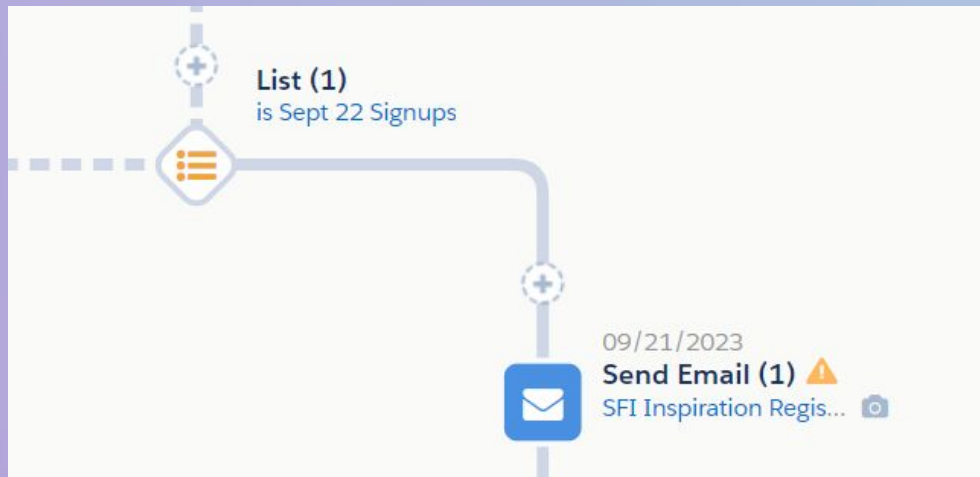


```

```




Use an Engagement Studio to Send Reminders with the QR code



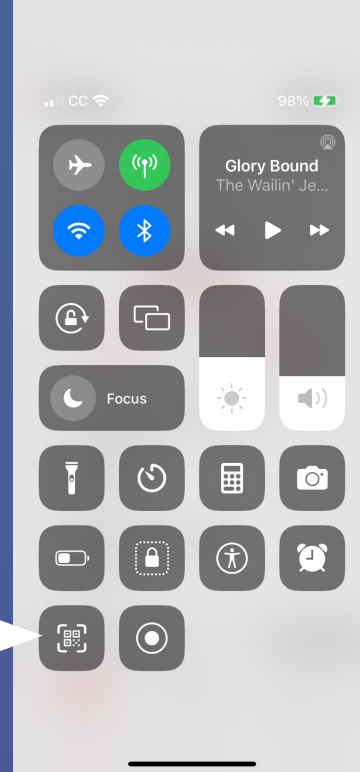
Check-In





QR Code Scan App

JK, there is no App!
Just Scan with any
Phone



Form Handler Completion Actions

Completion Actions

Conditional Parameters If [Prospect custom field] [Focus Session] [is] [22]

Add to CRM Campaign Salesforce Lunch and Inspiratlon Sesslon - Checked In Sept 22

Add to list [Sept 22 CheckIn](#)

Conditional Parameters If [Prospect custom field] [Focus Session] [is] [15]

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Add to list [Sept 15 CheckIn](#)

Conditional Parameters If [Prospect custom field] [Focus Session] [is] [29]

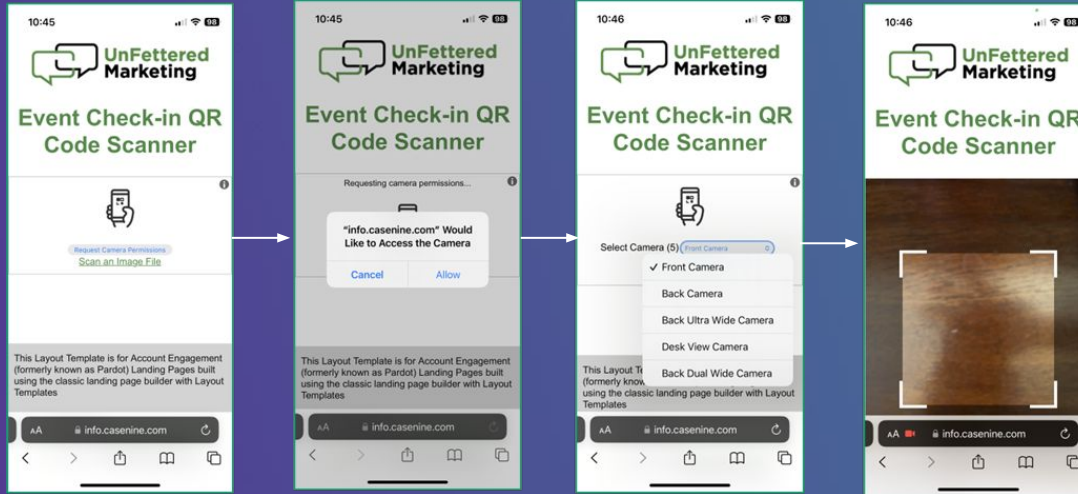
Add to CRM Campaign Salesforce Lunch and Inspiratlon Sesslon - Checked In Sept 29

Add to list [Sept 29 CheckIn](#)

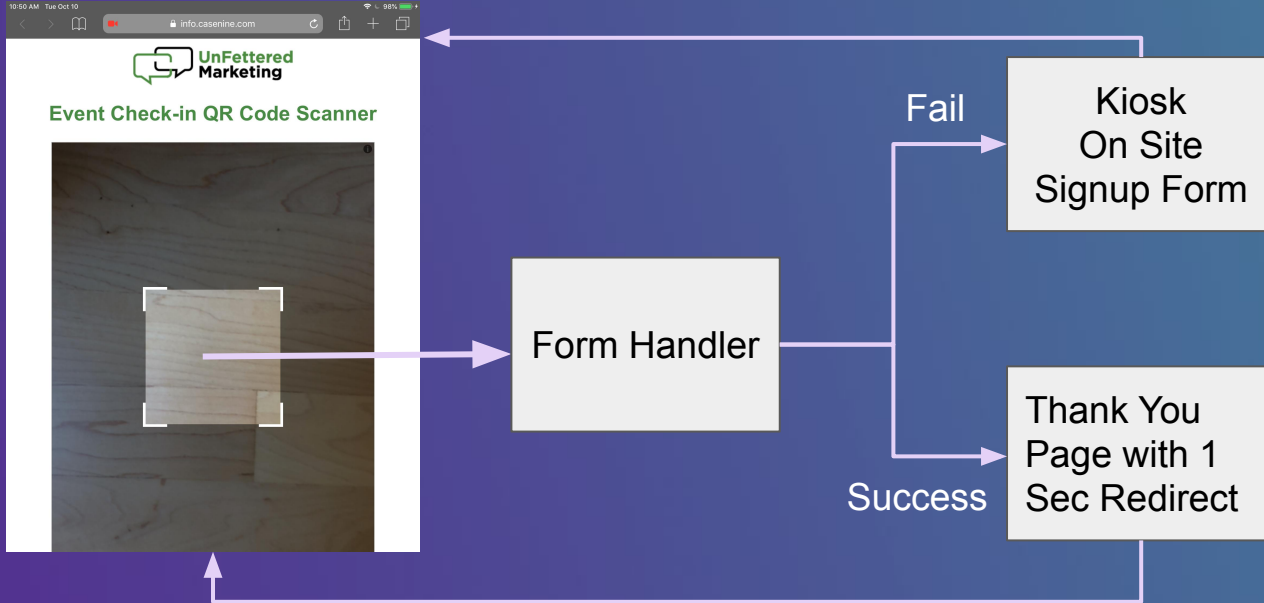




QR Code Scanner Landing Page



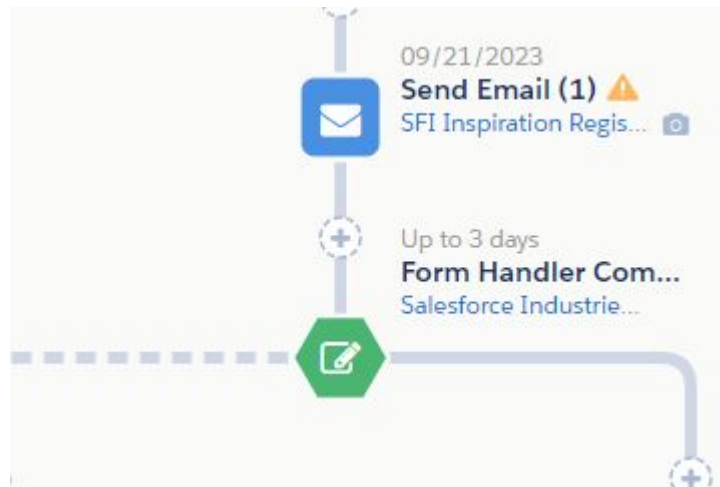
QR Code Scanner Landing Page Flow



Post-Event



Watch for Check-In Handler to advance Engagement Studio Actions



For Example:

- Thank You Emails
- Event Feedback Request
- Send Slide Decks
- Sales Follow-up Tasks

Further Enhancement Ideas

- Add the Walk-In form Option to your Landing Page
- Segment your registrations and check-ins based on status (net new, existing customers)
- Use External Actions to send SMS to Prospect owner when checked in
- LinkedIn Lead Form to Form Handler for Registration (works same as a form)
- Include ICS Files or Calendar Links in your emails with a Link Generator
- Send QR Links from other systems (Partners?), check in on your AE Account



Limitations

- Session Capacity Management (what's your Signup / Show Up ratio?)
- Wildcards in emails (+) are flaky with the QR generators....
- Be careful about your stored date field characters, avoid non URL safe like / or spaces.
- Must be free events
- Anyone *could* scan their code at any time
- Free QR image generators throttle usage



Resources

- Dynamic QR Code Generation Resources:
 - [Google Chart API](#) (deprecated, but still works)
 - [Quickchart.io](#) (free or paid)
 - [Bit.ly](#) API (paid plans only)
- Base Layout Template code for QR Code Scanner Landing Page
 - [Instructions](#)
 - Layout Template [on my blog](#)
 - JS Resource from [Scanapp.org](#)
- [LinkedIn Lead Forms to Form Handler via Zapier](#)
- Calendar Link Generators: <http://icalgen.yc.sg/> or <https://parcel.io/tools/calendar> or <https://www.labnol.org/calendar/>





Thank You!

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