



# EventPro® **Virtual Assistant**<sub>suite</sub>

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automation services for EventPro Software

## **EventPro Virtual Assistants (EVAs)**

Calendar Publish • Calendar Sync • Reports • Change Notifications  
Events • Event Attendees • A/R • Tasks • Invoice Export

[sales@eventpro.net](mailto:sales@eventpro.net)

[www.eventpro.net](http://www.eventpro.net)

1-866-920-7996 TOLL FREE

# Simplify and streamline your workflow with EventPro's Virtual Assistants (EVAs)

*Imagine having a personal assistant who could keep track of your entire organization's schedule, and send out consistent reminders to the right people at the right time, 24/7 without a break...*

That's what EventPro's Virtual Assistant (EVA) Suite can do for you!

## How Does It Work?

EventPro Virtual Assistants (EVAs) automatically scan your EventPro database at scheduled intervals, looking for certain situations or changes.

When triggered, the EVAs will automatically perform their specified actions, which could be sending notifications or reminders, updating or syncing online calendars, generating and sending reports, and more.

## Automated Notifications & Reminders

The notification-based EVAs can send automated reminders via email and, in most cases, SMS text. You define the custom subject and text templates for the notifications, which can include Merge Fields that automatically pull in relevant recipient data, just like EventPro Letter Templates.

Email notifications can typically contain multiple attachments, including EventPro reports, internal documents, letters, .ics calendar attachments (if the recipient is linked to an event), and more.

## Save Time

Meet Deadlines

Keep People Informed

Reduce Repetitive Tasks

## Put Virtual Assistants to Work for You

Any EventPro Virtual Assistant (EVA) can be purchased separately, or you can take advantage of the convenience of the entire integrated suite.

- EVA-Calendar Publish
- EVA-Calendar Sync
- EVA-Reports
- EVA-Change Notifications
- EVA-Events
- EVA-Event Attendees
- EVA-A/R
- EVA-Tasks
- EVA-Invoice Export

EVAs are further described on the pages below.

For Virtual Assistant **technical requirements**, see [www.eventpro.net/technical-requirements](http://www.eventpro.net/technical-requirements)

Contact us for a free **software demonstration**:

- sales@eventpro.net
- 1-866-920-7996 (toll free)
- www.eventpro.net

*Virtual Assistants. The auto-responders have been a gamechanger for our team. We use about 15 different auto-responders that are each triggered by something different & send a variety of messaging out to our clients. We were doing all of this manually before. Having this automated has saved us a lot of time.*

— Caitlin, Chesapeake Bay Foundation

# Calendar Assistants



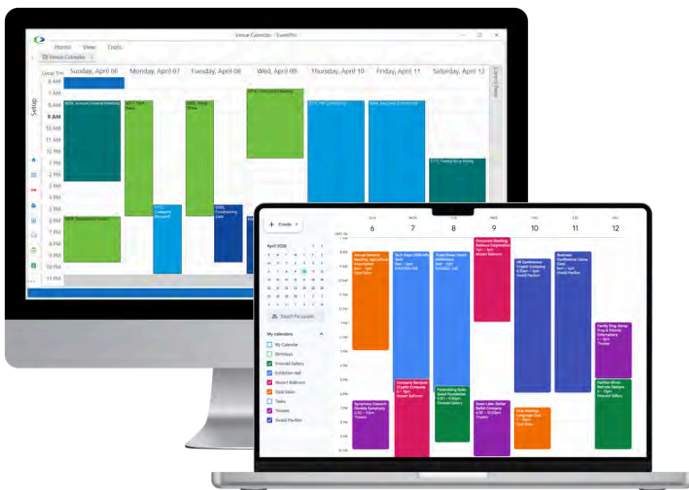
## EVA-Calendar Publish

pushes your EventPro event booking calendar to third-party online calendars, including Google, Exchange, Outlook, and a variety of popular web-based (iCal) calendars.



## EVA-Calendar Sync

includes the functionality of EVA-Calendar Publish, and **adds** 2-way booked location sync for Exchange, MSGraph, and Google Calendars with your EventPro calendar.



### Cost-Effective Viewing Options

EVA-Calendar Publish allows view-only users to see calendars online, saving the cost of additional user software licenses.

### Connect with Your Community

Keep your supporters informed, build interest among potential clients & attendees, and drive attendance to events. Make it easy for people to find consistent, up-to-date information about your organization's events on your website and social media.

- Embed an event calendar on your website and social media pages.
- Create an RSS Feed to embed on your website or distribute information via social media sites.
- Create a public event calendar that people can subscribe to in their own calendar apps.

### Keep People Informed

Shared event calendars empower staff, clients, and associates to find the information they need at *their* convenience. You're a busy event professional with lots to do! Let the automatically updated online calendars answer event questions for you.

### Always Up To Date

Calendar Assistants run on scheduled intervals, so shared event calendars are automatically updated with new data from EventPro as you go about your daily work - no extra typing or clicking required.

### Different Audiences - Different Views

Set up multiple shared calendars, tailored to different intended viewers or purposes, e.g. filter the included events by different criteria, such as status or location, and choose whether to include restrictions, like holidays or other days that your venue is not available.

### Expand Booking Options

EVA-Calendar Sync makes event booking more convenient & accessible, while maintaining EventPro's privacy. Staff can book events using the Exchange, MSGraph, or Google calendar they're already familiar with, and bookings are automatically synced back to your EventPro application.

### Avoid Shared Space Conflicts

If you often book events in a shared space, EVA-Calendar Sync can help prevent booking conflicts, even if all parties aren't using EventPro. The shared calendar allows you to see synced events, and avoid booking over them.

# EVA-Reports

## Streamline the Information-Sharing Process

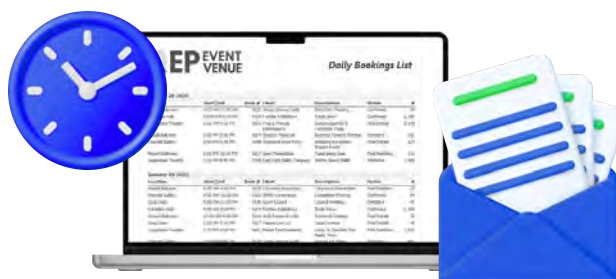
EVA-Reports automatically send email notifications with attached reports to specified recipients at scheduled intervals. Interval scheduling is as flexible as you need it to be – daily, weekly, monthly, every 3 days, Tuesday & Thursday of each week, 1st Monday of each month, etc.

## Monitor the Information You Need

Select any report – system or custom – and apply extensive filtering options to narrow down the exact information you want delivered.

## Keep Stakeholders Informed & Involved

Whether you need to send reports to managers, staff, or any other stakeholders, you have multiple recipient options – individual users at your organization, user groups, individual email addresses, or a combination of any of the above.



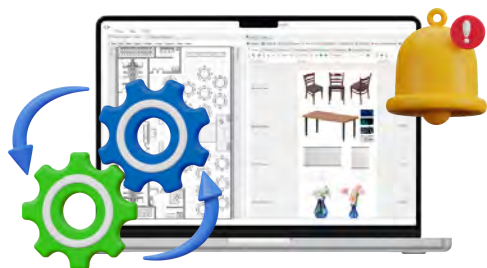
## Automate Report Delivery

You can set up an automated routine for reports you use on a regular basis. A sample setup could be:

- Daily at 6am: Daily Bookings List to Reception
- Wed-Sun 7am: Catering report to Kitchen
- Mon & Wed 7am: Outstanding Invoice List to Finance
- Daily 8am: Event Setup reports to Event Managers
- Daily 8am: Setup & Staffing Report to Operations
- Monthly on the 1st at 9am: previous month's Utilization Report to Management

*As there are routine reports that we send both internally and externally, the Virtual Assistant feature has saved significant time for us.*

— Michael, UBC Robson Square



## Is Change in the Air? Now You'll Know!

When you're planning events, details can change in an instant: catering added, new contact entered, event moves to a different room, attendance numbers change, and so on. If a need-to-know person isn't informed of the change, the whole planning process can fall apart.

*If only people could be automatically notified of any changes in event management... Well, that's **exactly** what EVA-Change Notifications will do!*

When a defined change occurs in EventPro, EVA-Change Notifications automatically send notifications to the relevant users and departments via email and/or SMS text.

# EVA-Change Notifications

## Who Needs to Know What, How, and When?

You define what kind of change in the database triggers the notification: new event created, event catering added, event status changed, new CRM company entered, or pretty much anything else you can think of that's recorded in EventPro's audit log.

You also choose which user or department needs to receive the notification, and whether it's by email and/or text. Merge fields in the notifications can pull in personalized information for each recipient. Emails can also include multiple attachments, such as EventPro reports, letter templates, and other files.

For example, you could set up an EVA-Change Notification to notify *all* Users if an Event's Status changes to "Cancelled," but notify *only* Users in the A/V department if a change is made to an Event's A/V resources specifically.



# EVA-Events

## Keep Events Running Smoothly

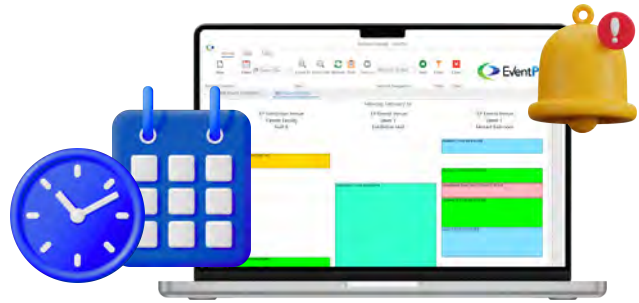
EVA-Events send automated notifications to your event clients and event-related Users, scheduled according to critical dates in the event timeline.

## Timing is Everything

For example, you can schedule notifications for...

- "x" days before/after the event's Start/End Date
- "x" days before/after the Contract Required Date
- "x" days before/after the Deposit Required Date
- upon change of Event Status

The automatically scheduled notifications can be sent by email and/or SMS text, personalized with merge fields that pull in relevant details for the specific recipients. Emails can also include multiple attachments, such as EventPro's event-related reports.



## Stay in Touch

EVA-Events allow you to automate some of the regularly scheduled "touches" that you do with your event clients. Just a few examples could be:

- 1 Day before Contact Due: reminder that the contract must be signed by tomorrow
- 3 Days before Event Start: event reminder with attached Event Confirmation report that the client can review for "last minute changes"
- 1 Day before Deposit Due: reminder that the deposit must be paid by tomorrow
- 1 Day after Event End: post-event thank-you

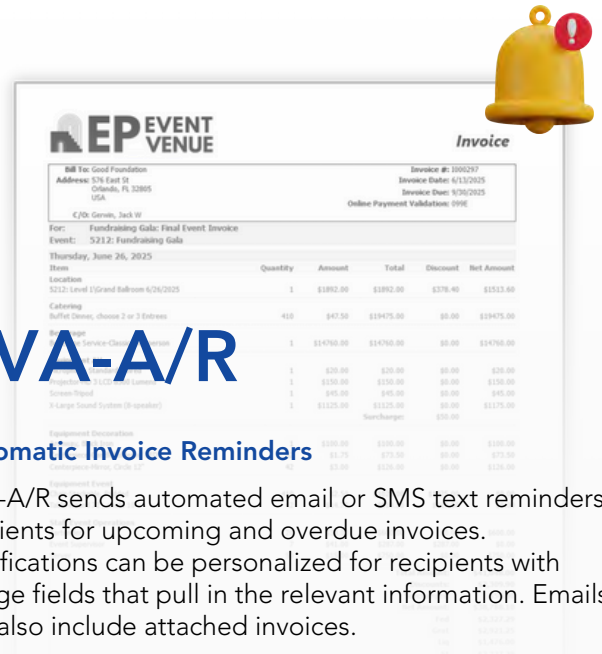
## EVA-Event Attendees

EVA-Event Attendees send automated notifications to Event Attendees, scheduled to occur...

- "x" days before or after the Event Start/End
- "x" days before or after the Function Start/End
- upon a status change

Event attendee notifications can be sent by email and/or SMS text, with merge fields to pull in personalized details for each recipient. Emails can also contain multiple attachments, including EventPro reports, calendar (.ics) attachments, and other files.

To further assist you with attendee management, you can also set up EVA-Event Attendees to automatically cancel or delete attendees based on criteria such as non-payment.



# EVA-A/R

## Automatic Invoice Reminders

EVA-A/R sends automated email or SMS text reminders to clients for upcoming and overdue invoices. Notifications can be personalized for recipients with merge fields that pull in the relevant information. Emails can also include attached invoices.

EVA-A/R's built-in filter ensures that notifications are not sent for voided or already paid Invoices.

## Perfect Timing

The notification timing is based on the Invoice Due Date; you choose the number of days before or after an Invoice is due. You could, for example, send a friendly reminder that an invoice is 14 days overdue, and then perhaps a less friendly reminder that an invoice is 90 days overdue. The reminders automatically disable when an invoice has been marked as paid.

# EVA-Tasks

## Keep Everyone in the Loop

In our fast-paced world full of distractions, it's easy to let deadlines slip off your radar. You need an ultimate to-do list that knows when to give you a nudge.

EVA-Tasks send automatic email or SMS notifications to need-to-know people when Tasks need their attention, e.g. when a Task...

- is created
- is completed
- reaches its Start Date/Time
- reaches its Reminder Date/Time
- becomes Overdue
- continues to be Overdue (escalates)
- is assigned or re-assigned

You can set other notification criteria, as well.

## Task Reminders for Assigned Users

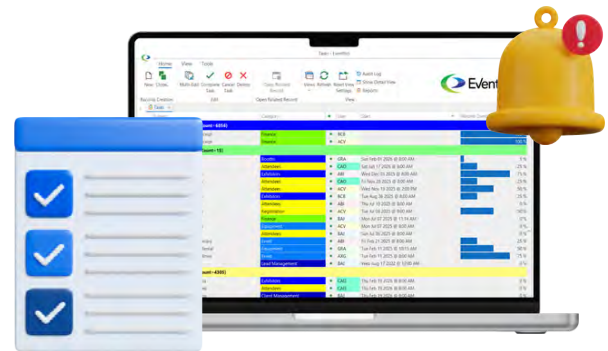
EVA-Tasks work from EventPro's Task Management, scanning at set time intervals for Tasks that meet the criteria. When such a Task is detected, the email or text is automatically sent to the assigned Task User(s). Overdue reminders can repeat until the Task is done.

## Not at Your Desk? Not a Problem

The automatic service runs in the background while you carry on with your work. Even if EventPro Users are not logged into EventPro to view their Task List or see a pop-up Task reminder, they can still get the notifications via email or text.

## Nothing Falls Through the Cracks

With the safety net of EVA-Tasks, you can banish "We missed the deadline!", "Nobody told me!", and other exclamations of dismay from your office. No more frantic email, text, and phone exchanges, trying to figure out who was supposed to do what. No more annoyed clients and suppliers waiting on promised actions.



# EVA-Invoice Export

## Remember...Even if You Forget

On scheduled time intervals, EVA-Invoice Export automatically creates the invoice data export flat file based on your set filtering criteria, and marks the invoices as exported. This saves you the time and effort of manually running the export, plus EVA-Invoice Export remembers to do the export regularly, even if you forget.

## Coordinate with Your Preferred Accounting Software

The format of exported invoice data is determined by your Invoice Export System Settings in EventPro, which can export invoice data in a variety of formats ready for import into many commonly used accounting software products, including QuickBooks, MYOB, Sage 50, Microsoft Dynamics GP, SAP, Adept, Pastel, and more.

# Questions?

If you have any questions about EventPro's Virtual Assistants, don't hesitate to contact us!



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