



EventPro®  
**Virtual Assistant** suite  
automation services for EventPro Software

Your Very Own Time-Saving Assistant to  
Simplify and Streamline Your Workflow

Calendar Assistant • Task Assistant • Change Notification Assistant  
A/R Assistant • Event Assistant • Report Assistant • Invoice Export Assistant

# CalendarAssistant

## Easily Share Event Calendars Across Multiple Platforms

EventPro Calendar Assistant streams your EventPro event calendars to Outlook, Google Calendar, and a variety of other popular calendars that support iCal (.ics) subscriptions, making it easier than ever to share event information. The Calendar Assistant automatically updates your shared event calendars with new data from EventPro as you go about your daily work - no extra typing or updating involved.

## Share, Connect & Inform with Calendar Assistant

Not only does the Calendar Assistant make sharing event information extremely easy, your online event calendars will help you connect with your community and save valuable time.

## Connect with Potential Clients & Attendees

We all realize how important social media is for promoting your organization and events online. Providing online event calendars and creating RSS feeds for social media platforms are great ways to keep people informed, build interest about happenings at your organization, and drive attendance to events.

## Keep Associates Informed - While Saving Time

You're a busy event professional with lots to do. You don't need the constant phone calls and emails from staff and associates looking for event information. By automatically publishing and updating online event calendars with Calendar Assistant, you empower your personnel and associates to find the information themselves at their convenience...conveniently also saving yourself from time-consuming interruptions.

## Cost-Effective Way to View Event Information

The Calendar Assistant is a cost-effective option for providing information to many view-only users. The shared event calendars save you the cost of buying extra licenses for users who only require viewing access to events.

## Different Audiences – Different Ways to Share

The versatile Calendar Assistant allows you to set up multiple shared electronic calendars, filtered by different criteria like status and locations, so you can tailor the exported calendars to different intended viewers or purposes.

You can use 3rd party applications to make your event calendars easily available for viewing and sharing, such as these examples:

- Streaming to major calendars such as Outlook (desktop/network or online), Google, MSN, Yahoo, and more. People can use their calendar applications to subscribe to your EventPro Event Calendar(s).
- Syncing the calendar online with your smartphone (iPhone, Android, etc.) to keep on-the-go information at your fingertips while out of the office or traveling.
- Embedding the calendar into your website or Facebook page.
- Creating an RSS Feed that is embedded on your website or used to distribute information via social media sites like Twitter, Facebook, and others.



# Report Assistant

## Streamline the Information Sharing Process

The Report Assistant automatically sends 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, the first Monday of each month, etc.

## Monitor the Information You Need

You can select any report – system or custom – and apply extensive filtering options to narrow down the exact information you want delivered. For example, you could have a Daily Booking List sent to reception each morning. Perhaps you want an event setup/staffing/catering report automatically sent to event managers, or an outstanding invoice list sent to your finance department.

## 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.

## The Benefits of Task Assistant

In addition to reducing stress, the Task Assistant also delivers these benefits to you, your staff, and your clients:

- Everyone who needs to know will get reminder emails. (No more “No one told me!” excuses.)
- Tasks get done on time - and done correctly.
- No more missed deadlines.
- No more annoyed clients, suppliers, or other people waiting on your promised action.

**BONUS:** All this reminding is done without any extra time or effort by you ... no extra emails, no panicked last-minute texts, no desperate phone calls. The task notification service automatically runs in the background while you get down to important work.

# Task Assistant

## Have You Ever Missed a Deadline?

You're going about your work day and feeling fine when suddenly... you realize that you forgot to do something really important. Yesterday. If only someone had reminded you!

## Task Assistant Keeps You on Track

In our fast-paced world full of distractions, it's easy to let deadlines slip off your radar. The Task Assistant is like a to-do list that knows when to give you a nudge. After you set up the criteria for notifications, the Task Assistant automatically sends email reminder notifications to you and any other need-to-know users that certain Tasks are upcoming, about to start or (gulp!) overdue.

## How It Works (Hint: You Don't Need to Do Much)

You set the Task Assistant's schedule for scanning your EventPro data looking for upcoming, started and overdue tasks. The tasks in EventPro Software have already been assigned to the correct users or user group when created. Start the Task Assistant and it runs on the set intervals, looking for tasks that need attention and emailing you or any assigned user(s) a reminder notification. Overdue tasks can be followed up with automated repeat notifications until the task is done. That's it!

## Nothing Falls Through the Cracks Again

Stay in the loop and make sure tasks get done! With the safety net of EventPro's Task Assistant, you can banish “We missed the deadline?!” and many more exclamations of dismay from your office vocabulary forever.

# Invoice Export Assistant

## Automated Invoice Data Export

The Invoice Export Assistant allows you to schedule automated exporting of invoice data, with filtering capabilities to determine the criteria of invoices that are marked for export.

## Coordinate with Your Preferred Accounting Software

The format of exported invoice data is determined by your Invoice Export System Settings in EventPro.

EventPro 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 many more.



# A/R Assistant

## Automatic Invoice Reminders

The A/R Assistant sends automated Client Invoice Reminder emails for upcoming and/or overdue invoices, with the relevant invoice or other related report attached.

The built-in filter ensures that notifications are not sent for voided or already paid Invoices.

## Perfectly Timed Notifications

The notification timing is based on the Invoice Due Date, meaning you can set the Assistant to send an email X days before an Invoice is due and/or Y days after an Invoice is due.

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# Change Notification Assistant

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

When you're planning events, details can change in an instant: catering is added, a new contact is entered, the 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, what do you know – that's exactly what EventPro's automated change notifications do!

When a defined change occurs in EventPro, the Change Notification Assistant automatically sends a notification email to the relevant user and/or department. Who defines the change or the "relevant" user? You do! You can choose what kind of change triggers the notification – event catering added, new event created, new contact entered, or pretty much anything else you can think of – and direct the notification to the user or department that needs to know.



# Event Assistant

## Event Reminders – Don't Miss a Beat!

The Event Assistant will automatically send scheduled notifications with the relevant event report you select.

The timing of the automated emails can be based on important occurrences in the Event:

- "X" days before the Event Start Date, e.g. a reminder about an upcoming event
- "X" days after the Event End Date, e.g. a thank you letter
- On or "x" days before/after the Contract Required Date
- On or "x" days before/after the Deposit Required Date
- Upon change of Event Status

### Virtual Assistant Suite Technical Requirements

- The latest version of EventPro.
- For use with EventPro On-Prem, you will require .Net 4.5 or newer, and Windows Server 2012 or newer. The server on which you install Virtual Assistant Suite must have Read/Write access to your SQL server, and must have .NET and ASP enabled. If installing on a third-party web host (must support .NET and ASP), you will need to configure your SQL server to accept connections from outside its network.
- For use with EventPro Cloud, the optional Virtual Assistant Suite is also hosted as part of the EventPro Cloud Service.
- For more details, see [www.eventpro/net/technical-requirements.html](http://www.eventpro/net/technical-requirements.html)

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**Contact us today for  
a free demonstration**



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