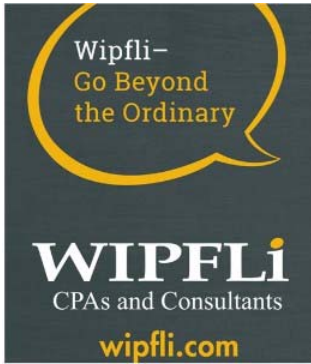


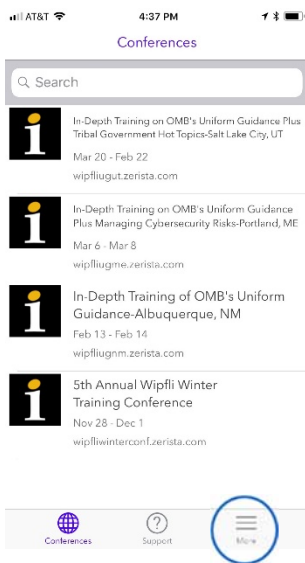


# Wipfli Mobile Event App



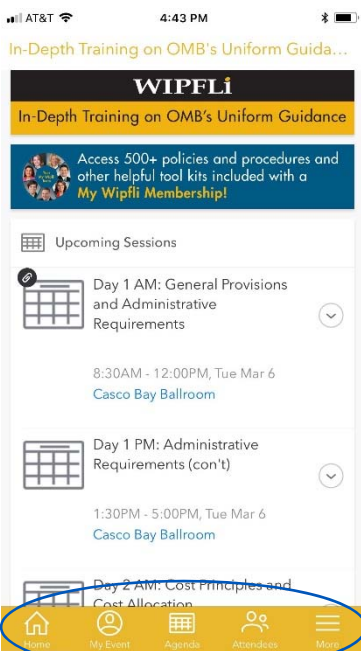
## Access our new Wipfli mobile event app:

- ◆ **Phone/tablet**—From your app store search for Wipfli and download the Wipfli app.
- ◆ **Computer**—Access the Wipfli app website on your computer at this link: <https://wipfliwinter2019.zerista.com>.
- ◆ **Login**—Login using your registration username (email) and password.



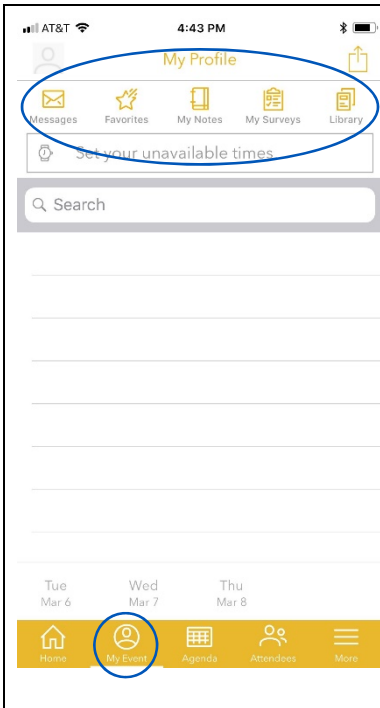
## Events List

- ◆ **Events**—After opening the app, this is the first page you see with a list of Upcoming or Past events you registered for.
- ◆ **Select**—Select the event you are currently attending.
- ◆ **Switch between events**—Select more in the bottom right corner. Then select “Settings” then “Conferences.” You will be taken to the screen that displays your Upcoming and Past events.



## Home Page Options

- ◆ **Home**—Main screen, includes training agenda and Social Media posts.
- ◆ **MyEvent**—Contains your specific information, Profile, Messages, Favorites, Notes, Surveys, Library.
- ◆ **Agenda**—List of sessions for the training as well as a tab for your schedule only.
- ◆ **Attendees**—List of all the attendees registered for the training as well as a tab for your contacts (favorites).
- ◆ **More**—List of additional available items.

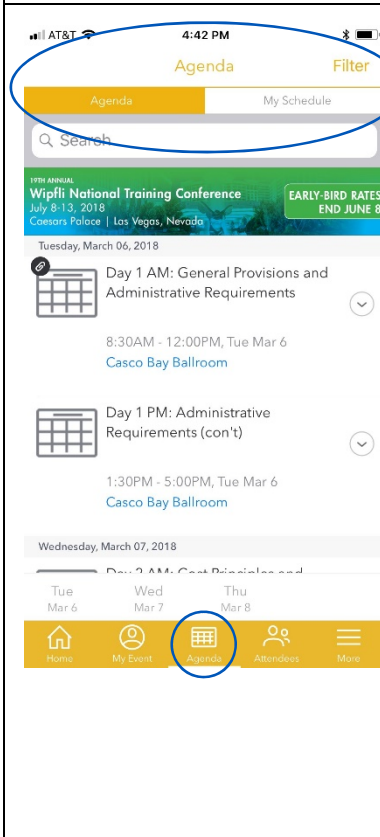


## My Event Page Options

- ◆ **Main Screen**—Defaults to your schedule.
- ◆ **Messages**—Inbox of messages you have received, sent and archived.
- ◆ **Favorites**—Contacts you have marked as Favorites.
- ◆ **My Notes**—Notes you have taken during your sessions or about contacts.
- ◆ **My Surveys**—A survey for each session will show up here for you to enter the keywords given to you during each session. Completing each of these surveys will track your attendance for CPE Credits.

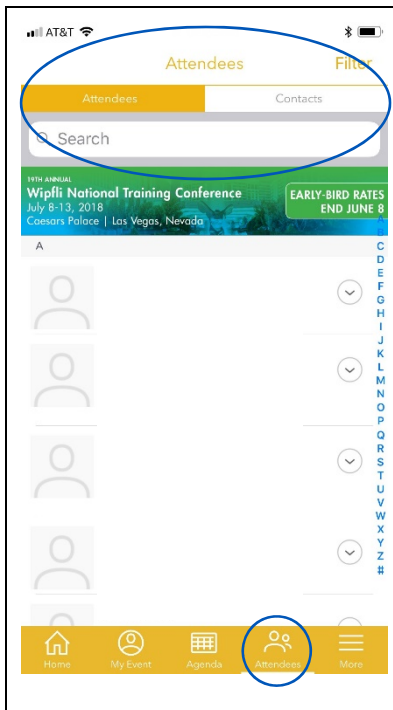
At the end of the conference, an Overall Survey will also show up here to be completed regarding the entire conference.

- ◆ **Library**—The materials you downloaded in the app will show up here.



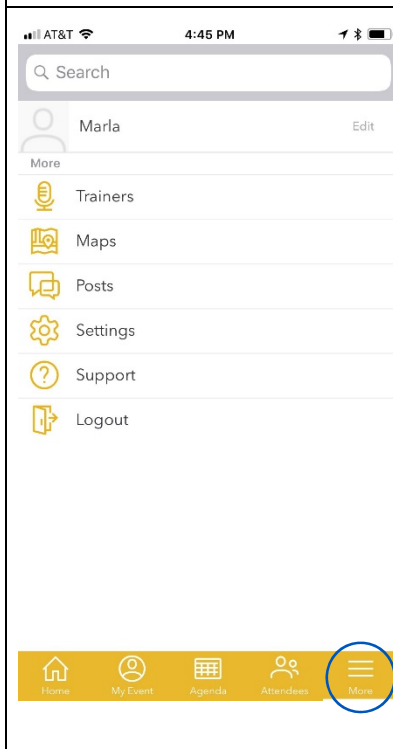
## Agenda Page Options

- ◆ **Agenda**—List of sessions for this training, with date/time, location (touch room to view a map), description and trainer(s). Take notes for the session, open the survey to enter the keyword. The materials for this training can be download from the first agenda item.
- ◆ **My Schedule**—List of sessions you are registered for with date/time, location (touch room to view a map), description and trainers. Take notes for the session. The paperclip icon within the black circle indicates materials are attached to this session to be downloaded.
- ◆ **To add, delete or change a session:** touch the three dots on the right of the session name. If you want to add it to your schedule tap “add to schedule.” If you want to delete a session tap “remove from schedule.”
- ◆ **To submit a keyword or complete a survey:** touch the session you would like to submit a keyword for. Look for “Survey” then tap the blue “Click to take survey” bar.
- ◆ **Filter**—Use the Filter option to Sort/Filter the sessions. **Sort** allows you to sort the sessions by either the Start Date, or Session Name.
- ◆ **Recommended**—Display recommended sessions.
- ◆ **Search**—Use the Search option to search for specific words within a session title. When finished, make sure to cancel the search option to return to complete list.



## Attendees Page Options

- ◆ **Attendees**—Complete list of all training attendees and their profile, including title, agency, and any additional information they may have added, including social media networks. You can add attendees to your contacts (favorites list), schedule meetings, message them and take notes regarding an attendee.
- ◆ **Contacts**—List of contacts you have added as your favorites). Their profile includes title, agency, and any additional information they may have added, including social media networks. You can remove attendees from your contacts (favorites list), schedule meetings, message them and take notes regarding an attendee.
- ◆ **Filter**—Use the Filter option to Sort by Last Name, First Name, Company, Updated, State, Country.
- ◆ **Search**—Use the Search option to search for specific names or agencies. When finished, make sure to cancel the search option to return to complete list, make sure to cancel the search option to return to complete list.



## More Page Options

- ◆ **Trainers**—List of all the trainers with their bio and sessions they are presenting.
- ◆ **Maps**—Map of the training room so you won't get lost.
- ◆ **Posts**—Follow twitter feeds, comment or post a photo.
- ◆ **Settings**—Change your passwords.
- ◆ **Support**—Support information for help.
- ◆ **Logout**—Logout of the app.

For support with the Mobile App, contact [gfponline@wipfli.com](mailto:gfponline@wipfli.com) or call 888.876.4992.