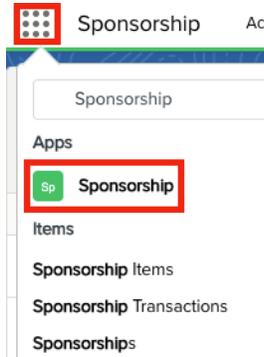


## PACK EXPO International 2022 Salesforce Guide

The purpose of this guide is to help you navigate the Sponsorships App in Salesforce as it relates to PACK EXPO International 2022. This is a relatively new module in Salesforce that has several different parts and is designed to help the Herndon and Chicago teams all work together on Sponsorship opportunities more effectively.

### Launching the App

If you go to the App Launcher (9-dots) in the upper-left hand corner, type in "Sponsorships":



This will take you to app with the appropriate tabs for the Sponsorship module:



### Sponsorship Items

**This should be one of the key screens that you use to check availability!**

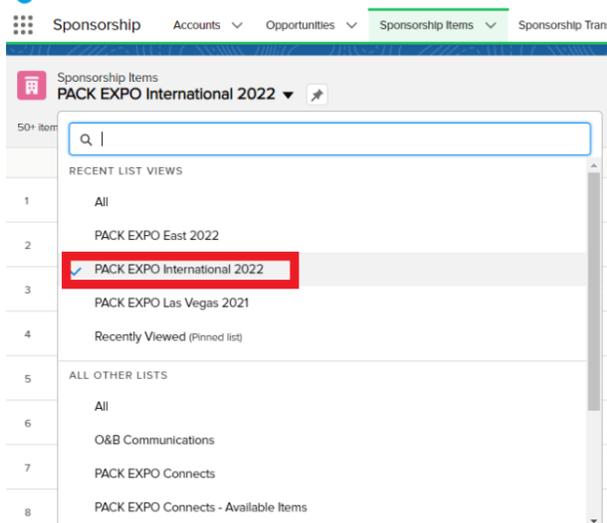
The Show Department has overall responsibility for entering in new Products as Sponsorship Items for each show, even those fulfilled by PMG. For PEI, the Show Department will retain these rights in Salesforce and should be the only ones entering new Sponsorship Products into Salesforce or manipulating pricing for products.

We have created a view for all Sponsorship Items for PACK EXPO International 2022, simply click on

"Sponsorship Items":



Then filter for "PACK EXPO International 2022":



In this view you should be able to see all Products & Sponsorship Items that are available for PACK EXPO International:

Product Item	Show	FRoR	Product	Cost	Items	Indicator	Items Sold
PI-0000000479	PACK EXPO International 2022		Show Guide - Front Cover Violator / Corner Peel (C)	\$7,500.00	0	🔴	0.00
PI-0000000480	PACK EXPO International 2022		Show Guide - Inside Front Cover (C)	\$11,500.00	1	🟢	0.00
PI-0000000481	PACK EXPO International 2022		Show Guide - Inside Back Cover (C)	\$10,200.00	1	🟢	0.00
PI-0000000482	PACK EXPO International 2022		Show Guide - Back Cover (C)	\$16,500.00	1	🟢	0.00
PI-0000000483	PACK EXPO International 2022		Show Guide - Single Page Ad - Interior page (C)	\$4,900.00	5	🟢	0.00
PI-0000000484	PACK EXPO International 2022		Show Guide - Two-Page Spread		1	🟢	8,500.00
PI-0000000485	PACK EXPO International 2022		Show Guide - Divider Banner 1/3 page - Alphabetical Exhibitor Listing	\$3,500.00	1	🟢	0.00
PI-0000000486	PACK EXPO International 2022		Show Guide - Tab Divider Full Page - Education Sessions (C)	\$6,200.00	1	🟢	0.00
PI-0000000487	PACK EXPO International 2022		Show Guide - Tab Divider Full Page - Floor Plans	\$6,200.00	1	🟢	0.00
PI-0000000488	PACK EXPO International 2022		Show Guide - Divider Banner 1/3 page - Floor Plans	\$3,500.00	1	🟢	0.00
PI-0000000489	PACK EXPO International 2022		Show Guide - Tab Divider Full Page - Alphabetical Exhibitor Listing (C)	\$6,200.00	1	🟢	0.00
PI-0000000490	PACK EXPO International 2022		Printed Show Guide - Floor Plan Logos (South Hall) (C)	\$1,500.00	3	🟢	0.00
PI-0000000491	PACK EXPO International 2022		Printed Show Guide - Floor Plan Logos (North Upper) (C)	\$1,500.00	3	🟢	0.00
PI-0000000492	PACK EXPO International 2022		Printed Show Guide - Floor Plan Logos (Lakeside Upper) (C)	\$1,500.00	-1	🟢	0.00

Each of the Sponsorship products in Salesforce links to the Product Hub at Opportunities.PACKEXPOinternational.com for more details and pictures.

There are several key columns for you to pay attention to:

Available...	Sold	Hold	Pending ↓	Items Left	Indicator
4.00	0.00	0.00	2.00	2	🟢
1.00	0.00	0.00	1.00	0	🔴
1.00	0.00	0.00	1.00	0	🔴

- Available per Show = the total quantity of each product available for the show
- Sold = the quantity of items for that particular product out of the total available that have been sold already
- Hold = the quantity of items that are reserved for a particular exhibitor, but not purchased yet
- Pending = the quantity of items that are reserved for a particular exhibitor and pending formal agreement
- Items Left = the quantity of items for the particular product that are still available to offer to an exhibitor
- Indicator = **A quick and easy way to be able to tell if that product is available to offer for sale to an exhibitor, or not**

- The indicator will have a green check mark if there is at least one of the product available for sale: 
- The indicator will have a red circle if there are no more items for that product available for sale: 

***If an item has a red circle, it is NOT available for sale. Please do not offer it to an exhibitor!***

### Opportunity Path

There is a separate, dedicated opportunity path for Sponsorships that has its own flow and process that is separate from the Media and Virtual Exhibitor/Refund paths:

New Opportunity

---

Select a record type

- Media  
Follow the Venator sales process
- Default  
Salesforce Default
- IOPP Opportunity  
For opportunities for more business related to Association Services
- Show  
Opportunities for Show Booth Sales
- Sponsorship  
Opportunity to sell sponsorship items for different show
- Virtual Show/Exhibitor Refund  
Opportunity option to reallocate funds to either a virtual or future event

*(Note: don't create Sponsorship opportunities this way! More on that ahead...)*

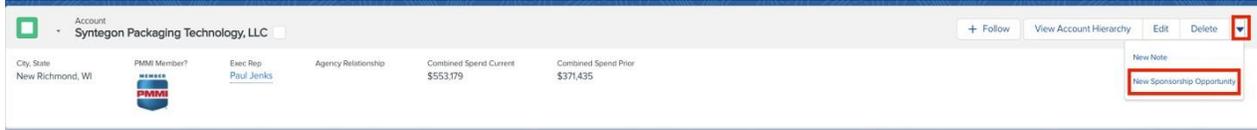
The opportunity path is laid out as follows:

- **First Right of Refusal** – Generally an exhibitor is offered the first right of refusal on a Sponsorship product that they have purchased for a previous show. All sponsorship products must be offered to the prior purchaser first, before being offered to other exhibitors, thus this is the first stage in the process.
- **Hold** – if an exhibitor is interested in a particular Sponsorship product, the Hold stage will “reserve” the quantity of a particular product for this exhibitor, which will keep it from being offered erroneously to other exhibitors when it is not truly available for sale.
- **Proposal** – this stage is for when a particular opportunity progresses with an exhibitor to the point where a proposal has been set to the exhibitor and we are waiting on them to sign any agreements or contracts, or to approve the order.
- **Closed** – like other opportunities, this stage has two flavors:
  - **Closed-Won** – meaning the exhibitor signed the agreement/approved the order and we have successfully sold the Sponsorship to the exhibitor
  - **Closed-Lost** – meaning the exhibitor decided not to purchase the Sponsorship
  - NOTE: Any “reserved” products & quantities that were held by a particular opportunity will be released when an opportunity is marked as **Closed-Lost**

**\*If you would like to put a sponsorship item on HOLD please follow these instructions below:**

### **Creating a Sponsorship Opportunity**

To create a new Sponsorship Opportunity, navigate to the account that is interested in purchasing the Sponsorship. In the upper-right hand corner, you will see a drop-down arrow with a list of actions. Select “New Sponsorship Opportunity”:



Pick the show name, “PACK EXPO International 2022” and the close date\*:

***\*NOTE: When you are placing an item on hold, please set the “Close Date” as no more than 10 business days in the future.***

New Sponsorship Opportunity

---

Account  
Syntegon Packaging Technology, LLC

\* Show Name  
PACK EXPO Connects

\* Close Date  
Sep 30, 2020

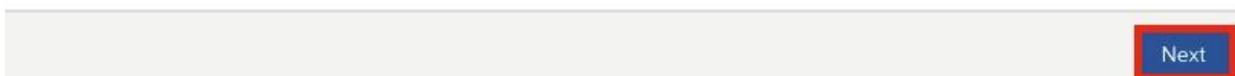
Then select the contact related to the account that you are working with on this opportunity:

#### Contact Selection

- Bill Burkart - Title: Human Resources
- Angela Zauft - Title:
- Michael Gensheimer - Title:
- Steve Volkert - Title: Sales
- Paul Jenks - Title: Director of Sales & Marketing, Confectionary and Food
- Craig Collett - Title: Director, HFFS Packaging Systems, Confectionary and Food
- Kelly Meer - Title: Product Manager- Packaging, Confectionary & Food

Then click Next (bottom-right corner of the window):

- Matthew Childress - Title: Field Service Manager
- Paul Garms - Title: Marketing Manager
- Scott Low - Title: Sales Manager



Next, you select the stage you would like the opportunity to start in. This defaults to “Hold” so you can just click Next, no need to change anything:

### New Sponsorship Opportunity

---



Select the FRoR Items

[Previous](#) [Next](#)

Click next and you will be able to select from the available sponsorship items for this show that the exhibitor is interested in:

### New Sponsorship Opportunity

---



Select Available Sponsorship Products

- "Tomorrow At" Email - Friday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Monday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Thursday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Tuesday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Wednesday Edition - Available: 1 - @ Price: \$7200 - Detail:
- Attendee Countdown Emails - 2 Weeks Out - Available: 1 - @ Price: \$7200 - Detail:
- Attendee Countdown Emails - 3 Weeks Out - Available: 1 - @ Price: \$7200 - Detail:
- Attendee Countdown Emails - 4 Weeks Out - Available: 1 - @ Price: \$7200 - Detail:
- Homepage Banner - Available: 4 - @ Price: \$5500 - Detail:
- Jumpstart - Monday - Available: 1 - @ Price: \$5500 - Detail:
- Jumpstart - Thursday - Available: 1 - @ Price: \$5500 - Detail:
- Jumpstart - Tuesday - Available: 6 - @ Price: \$5500 - Detail:
- Jumpstart - Wednesday - Available: 1 - @ Price: \$3500 - Detail:
- Online Directory Search Banner - Available: 4 - @ Price: \$10000 - Detail:
- Pub Trivia Sponsor - Emerging Leaders - Available: 1 - @ Price: \$5000 - Detail:
- Registration Website & Confirmation Logo - Available: 3 - @ Price: \$3750 - Detail:
- Steps Challenge Sponsor - Available: 1 - @ Price: \$5000 - Detail:
- Trend Chat Sponsor - Available: 4 - @ Price: \$2500 - Detail:

[Previous](#) [Next](#)

Note: You may select multiple items, but only available items will be shown on this list

Click Next and you will be taken to the newly created Opportunity record:

Opportunity  
**PACK EXPO Connects – Syntegon Packaging Technology, LLC – 2020-08-04**

Account Name: Syntegon Packaging Technology, LLC  
Close Date: 9/30/2020  
Amount:   
Opportunity Owner: Andy Lomasky

Progress bar: First Right of Refusal (grey) → Hold (blue) → Proposal (grey)

Details Related

Account Name	Syntegon Packaging Technology, LLC	Probability (%)	75%
Show	PACK EXPO Connects	Sponsorship Items Total	\$7,200.00
Opportunity Name	PACK EXPO Connects – Syntegon Packaging Technology, LLC – 2020-08-04		
Stage	Hold		
Close Date	9/30/2020		
Additional Information			
Next Step			
Description			

Sponsorship Transactions (1)

1 item • Updated a minute ago

Sponsorship	Sponsorship Product Name	Amount	Cost	Price	Total	Status
SI-000134	Attendee Countdown Emails - 1 Week Out	1.00	\$7,200.00	\$7,200.00	\$7,200.00	Pending

View All

Notice that the opportunity record has been created with the correct Sponsorship Items Total for the products selected. Also notice that the product has a status of "Pending", indicating that the quantity has been reserved specifically for this exhibitor and will not be shown as available to other exhibitors.

If you need to change the quantity, that is fine, just select the down arrow next to the Sponsorship Item and click Edit:

Sponsorship Transactions (1)

1 item • Updated 10 minutes ago

Sponsorship	Sponsorship Product Name	Amount	Cost	Price	Total	Status
SI-000135	Attendee Countdown Emails - 1 Week Out	1.00	\$7,200.00	\$7,200.00	\$7,200.00	Pending

View All

Sponsorship Transactions (1)

1 item • Updated a few seconds ago

Sponsorship	Sponsorship Product Name	Amount	Cost	Price	Total	Status
SI-000135	Attendee Countdown Emails - 1 Week Out	1.00	\$7,200.00	\$7,200.00	\$7,200.00	Sold

View All

Then change the "Amount" field to the quantity desired:

Sponsorship  
SI-000135

Sponsorship Product Name  
Attendee Countdown Emails - 1 Week Out

Sponsorship Product  
PI-0000000313

Available  
1.00

Amount  
1.00

Cost  
\$7,200.00

Total  
\$7,200.00

Price  
\$7,200.00

Flow Sponsorship Product Summary  
1 of Attendee Countdown Emails - 1 Week Out - Total  
Price: 7200

Account  
Syntegon Packaging Technology, LLC

Opportunity  
PACK EXPO Connects - Syntegon Packaging Technology, LLC -- 2020-08-04

Show  
PACK EXPO Connects

Status  
Pending

**Do NOT manipulate the Price of the product, especially without consent from Allison and Wendy!**

From this point in the process, you should discuss the opportunity with the exhibitor and provide a proposal once you've solidified their interest. Once a proposal is in the hands of the exhibitor and pending their approval, you can advance the stage to **Proposal**:

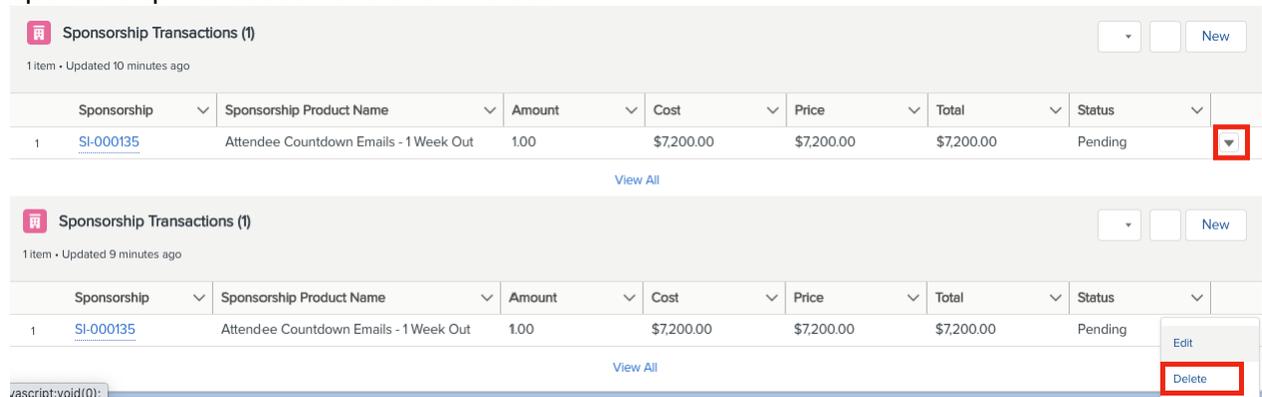


**\*Mary Thorne and Madeleine ONLY. Please contact Wendy Moore/Mary Thorne to issue a show sponsorship contract and have the opportunity closed.**

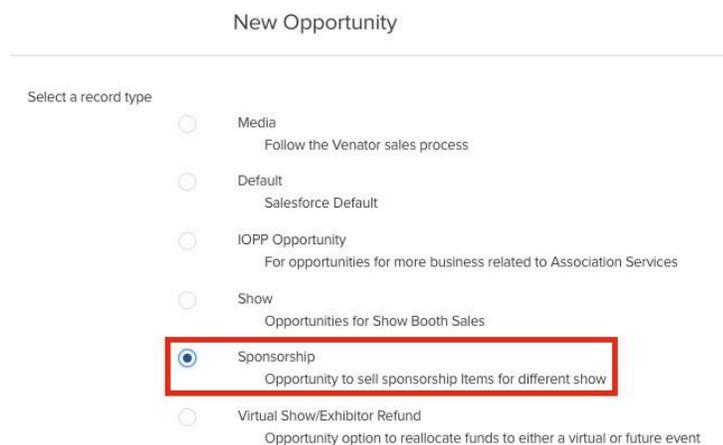
Closing the Opportunity

Once the linkage between the Salesforce opportunity and the Media Plan has been established in Media Planner, you should be able to create and share the Media Plan with the exhibitor. Once the exhibitor approves the Media Plan, the opportunity should be automatically marked as Closed-Won in Salesforce. **There should be no need to manually close an opportunity as Won in Salesforce.** You should only have to manually close as Lost in Salesforce, if the exhibitor decides not to purchase the Sponsorship item.

If an exhibitor reserved two sponsorship items but decided they are only interested in one, you do not need to close or re-enter the Opportunity. Simply click the down-arrow next to the Sponsorship Transaction and click “Delete”:



**IMPORTANT NOTE: Do NOT create Sponsorship opportunities from the main screen!**



The flow is set up to start from the Account. It is imperative to follow this flow as it will create the opportunity record for you at the end.

That’s it! If you have questions on Sponsorship items or this workflow, contact Andy Lomasky.

