

Workflow Overview

In this document, we will explain how to put on your first webinar.

Section 1 - Signing-In to Flow

Sign in to the Flow Dashboard and personalize your profile

Section 2 - Schedule Your First Webinar

Use our intuitive Event Creator to schedule your first webinar

Section 3 - Adding Content to the Storyboard

Add slides, videos and more using Content Blocks

Section 4 - Marketing and Finalizing Your Webinar

Send out and track targeted registration links via email and social media

Section 5 - Going Live

Showing off your content to a live audience

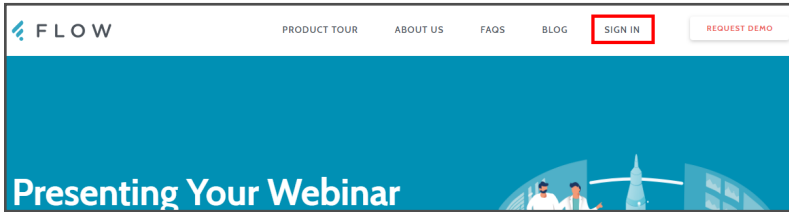
Section 6 - Post-Webinar

Collecting and analyzing your webinar data

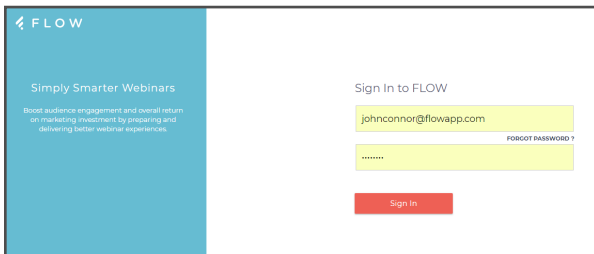
Section 1 - Signing-In to Flow



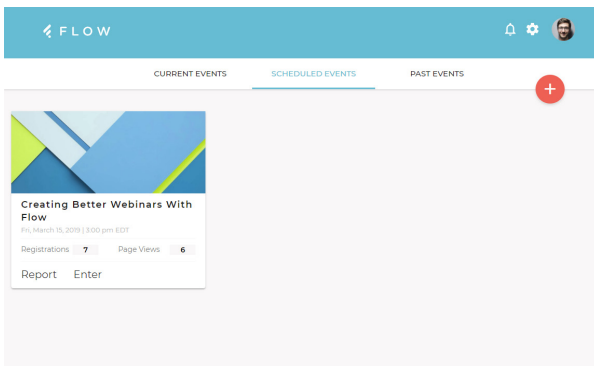
To sign-in to your Dashboard, visit <https://www.flowapp.com> and click the **Sign In** link at the top of the page:



Then sign-in using your email address and password that was emailed to you:

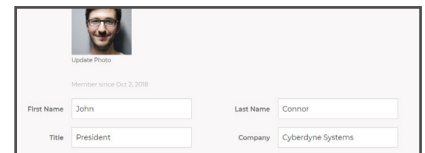


You are now on the main **Dashboard** page.



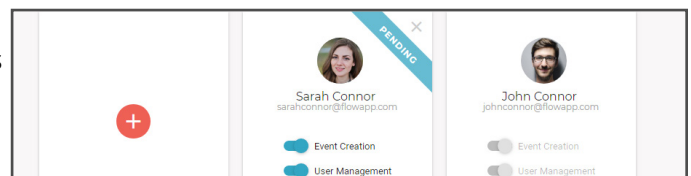
Account and Profile Settings

Before creating your first webinar, click your profile icon at the top right of the page to edit your Profile and Account information:



Admin List

Here, you will be able to view a list of account Administrators and Presenter accounts that you have created. To create a new account, click the "+" Card and fill out the information requested in the form.



Once you create an account, you can set them to have the ability to create events, manage users, be a billing contact, as you see fit.

Section 2 – Schedule Your First Webinar

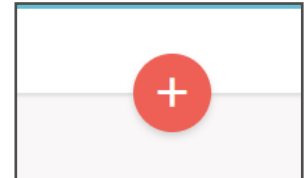


System Requirements

For the most optimal experience, we highly suggest that you view the **Flow Minimum System Requirements** list on our Help Site (<https://support.flowapp.com>) before attempting to use the Flow platform and creating your first event. This list is constantly updated, so please make a bookmark to always have the latest information on Flow requirements.

Creating a New Webinar Event

To create a new scheduled webinar, click the “+” button on the Dashboard to open the Webinar Creator:



There are 5 Tabs to go through when creating a webinar, summarized below:

General Tab

This is the basic information for your webinar, including Title (with image), Description text, and Date/Time information. You will also set the approximate duration of the webinar (for calendar scheduling purposes) and when you want your Attendees to join in (either 15 or 30 minutes early)

Presenters Tab

Here you will assign Organizer and Presenter access for the Webinar. Your user is added as an Organizer by default, and you can add new Presenters by clicking the “+” card and entering their personal info. Organizers have more access to Webinar tools than Presenters do, which will be explained in more detail.



TIP: When you create a new Presenter, they will automatically be added to your Admins list, which can be found later by clicking your Profile Icon and selecting Admins.

Settings Tab

This is where you will set your essential room functions. It is very important for you to go over each setting on this page and make sure they are set to your liking.



TIP: If you have any questions about what a setting does, click the “?” icon next to the setting to get more information.

Preview Tab

Here, you will finalize your settings by viewing a preview of your registration page. You can always go back to previous tabs using the navigation links at the bottom of the page and amend any settings you see.

Summary Tab

This page contains the access links for your webinar, including all tracked registration sources and Presenter/Organizer-specific links.

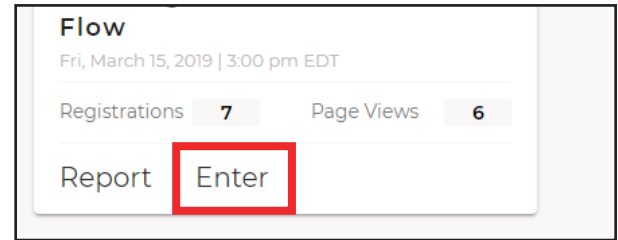


TIP: You can always access this page directly via the Webinar Event Card located on your Dashboard, in case you ever need to send these links out to Registrants or Presenters.

Section 3 - Adding Content to the Storyboard



Once you create a webinar, it will show up on your Dashboard as a new Webinar Event Card in the Scheduled Events section. Each new webinar needs to have content added to the Storyboard, which can be done by clicking the **Enter** link on the Webinar Event Card. This will take you into Webinar Prep Mode.



Prep Mode

Entering Prep Mode loads the webinar environment in your browser, allowing you to use the environment just as you would during a real live event (except with no Attendees present). While in Prep Mode, you will add Content Blocks to the Storyboard and setup your webinar workflow to use during your Live Webinar.

To add a new content block, click the Storyboard item in the left margin and then click the "Add Content Block" card. Here, you can click an available Content Block type and set up each piece of content individually. There are a few Content Blocks to choose from, including:



Slides: Slide and PDF presentation content uploaded from your computer

- This is probably the main type of content you will use for your webinars.
- Slides can be uploaded from PowerPoint, PDFs, or other file types. The content will be converted to a PDF once uploaded. All slide transitions and animations for PowerPoint files will be removed.
- You can set the content to be available for Attendee download.



TIP: Each content block has their own settings, though some are common amongst all of them. Please go over each block's settings carefully to ensure they are set up to your liking.

Survey: Questions and polls you can present to your audience

- You can create and save many surveys using this content block.
- Any surveys you create in one webinar will be available to use in any future ones.
- You can delete unwanted surveys here, if desired.

Video/Audio: Files you can upload from your computer

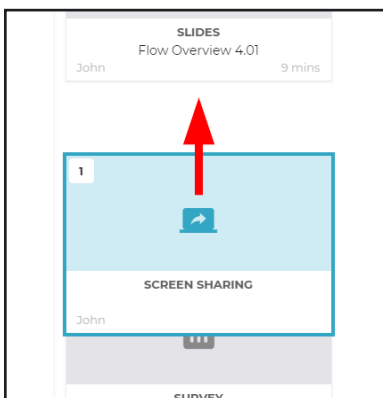
- Uploaded videos are converted to MP4 format and optimized for streaming during your webinar. 1080p and 2160p (4K) videos are converted to 720p.
- You can preview a video before adding it to your Storyboard by selecting Preview from the "..." menu.

Screen Sharing: Allows you to share one of your screens to your audience

- May require a Flow Screen Sharing Extension to be installed for the Chrome browser
- You can choose to show your entire screen or a specific application window.

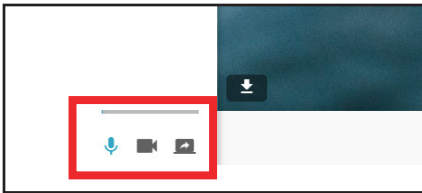
Q&A: Adds another Chat tab to your webinar specifically for attendee questions.

- In addition to the Presenter (Private) and Attendee (Public) chat tabs, this adds a third tab for content-specific questions, while a Q&A Content Block is active.
- Questions can be set to private and/or forwarded to all Participants, if desired. They can also be liked by Attendees and marked as answered by Organizers.

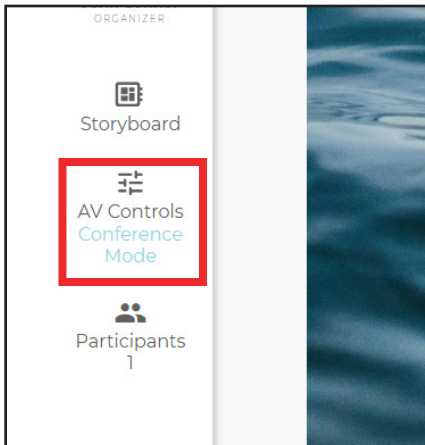


Once you add a Content Block to your Storyboard, you can click/drag them around to change their order from top-to-bottom, edit their content with the Edit button, or delete unwanted blocks with the Delete button.

Other Prep Mode Options



While in Prep Mode, you can have other Presenters join you to test out their microphone and webcam performance by using the links provided to them after you created the Webinar Event. Microphone and Webcam controls are at the bottom of the left margin, and if you need to change your device, you can do so from the main Options menu at the top right (the Gear Icon).



You can view and control other Presenters' webcams and microphones by clicking the AV Controls item in the left margin.

You can also test out your Storyboard Content by clicking the Play button in the center of the Content Block. This will load the item to the main Content Area so you can get a glimpse of how it will look during your actual webinar.

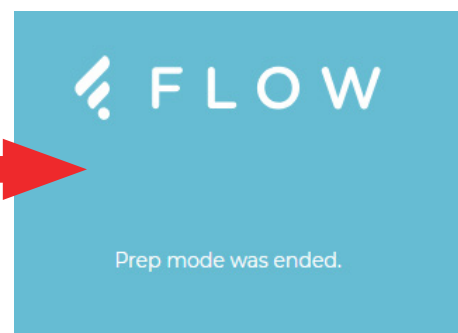
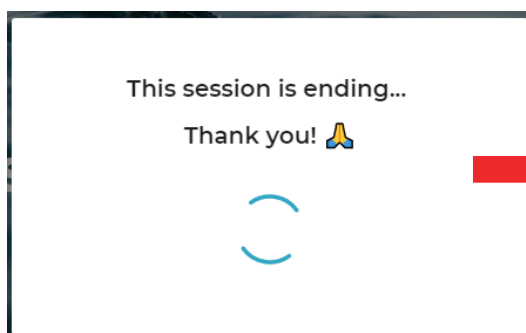


TIP: During Prep Mode, any Audio and Video content is in "Conference Mode," which means only other Presenters and Organizers can hear and see what's happening. You will learn more about starting a webinar, via the Start Webinar button, later in this guide.

You can end Prep Mode by clicking the End Prep Mode button at the bottom of the Storyboard Content Block list.



This will remove yourself and any other Presenters from the environment and place them on the Flow Exit Page. (You will be redirected to your custom End of Webinar link, if you set one up in your Advanced Webinar Settings)



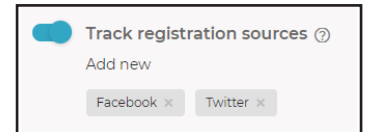
Section 4 - Marketing and Finalizing Your Webinar



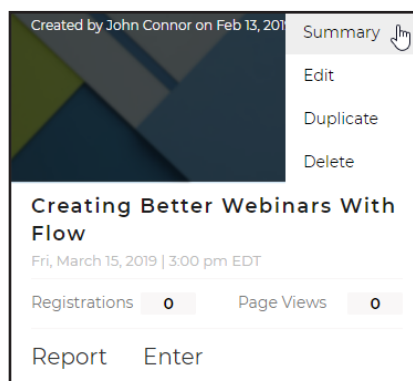
Once you have your Webinar Event Card created, you can start marketing the event to your audience.

Using Tracked Registration Sources

During Webinar Setup, you can choose to track different sources where you place your registration links, allowing you to see which sources generate the most traffic. We have some popular sources pre-configured, like Facebook, Twitter, and others, but you can also set up custom sources for your own website or virtually anywhere else you plan on placing registration links.



To access your custom links at any time before your webinar event, click the “...” button at the top right of the Webinar Event Card, then click the Summary link. You can copy any of your links from that page and send them off however you like.



Traffic from these sources can be viewed in the Event report by clicking on the Report link on the Webinar Event Card. This will load your Event Report page.

Event Report

This Report can be viewed at any time before or after your Webinar Event Date:

When viewed before your event, you can track where your registrations are coming from via the Tracked Registration Sources section, and geographically using the included map.

You can also read the answers to any custom questions asked on your registration page ahead of your event date.

When viewed after your event, the report page will show a participant timeline and other attendance information including attendance duration, survey results, and much more. You can export this data into Excel (CSV) spreadsheets for use outside of this report page, and download a consolidated PDF, if needed.

Duplicating Events

From the Dashboard list, you can Duplicate any event, along with its Storyboard content if you wish, by clicking the “...” button and then clicking the Duplicate link. This will load same event content previously entered for the original event but will force you to pick a new event date and time. It will also give you the opportunity to copy over all Storyboard content or start fresh with an empty Storyboard.

Deleting Events

You can delete any Webinar Event Card by clicking the “...” button and selecting Delete. You will need to confirm the deletion for it to be final.

Section 5 - Going Live



On the day of your event, preferably at least 30 minutes ahead of the start time, you should enter your webinar environment, using the Enter link on your Webinar Event Card, to begin final event preparations.

Below are a few of the more important things to know about using the environment during a live webinar.

Check Microphone, Webcam and Webinar Content

You can check your microphone and webcam (if needed), along with other webinar content, at this time. The environment is still in Prep Mode/Conference Mode, so many Attendees will not be able to see or hear your content until you start the webinar.

Starting the Webinar

When it is close to start time (15 minutes or less), the Start Webinar button will become clickable. This button officially starts the webinar for all participants, and completes the following actions at once:



- Ends Prep Mode and Conference Mode, allowing all connected Participants to see the content and hear the active Presenter
- Automatically activates the first Storyboard item in the list, along with all assigned presenter(s) audio and video feeds
- Starts the Webinar Recording (if enabled in the Webinar Event Card during setup)

Active Presenters

Each Content Block was assigned a Presenter during the creation of the Storyboard Content Blocks. If the Presenter has their microphone turned on (via the controls at the bottom left of the window, or via the AV Controls by an Organizer), they will broadcast out to all participants when any assigned Storyboard Content Block is active.

There is no need to manually activate a Presenter's microphone if they have been assigned Content Blocks during



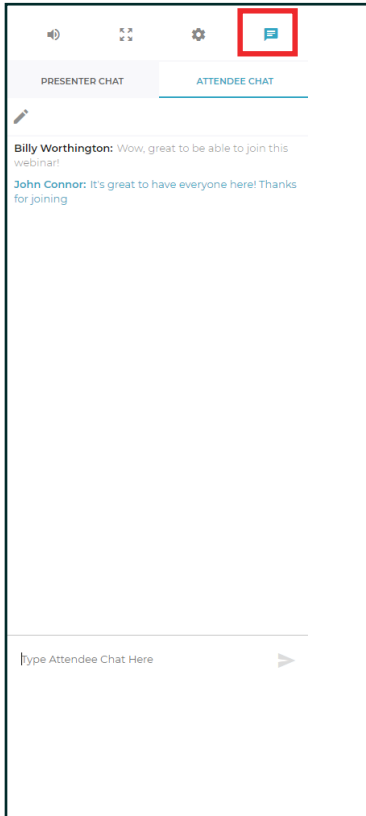
TIP: If you need to manually activate a Presenter for a block they were not assigned to, you can do so manually via the AV Controls, by clicking On Air for that Presenter. Make sure their mic or webcam is active before bringing them On Air.

the Prep Mode phase. They will broadcast out automatically.

Any assigned and active Presenters will be represented by their Profile Picture or webcam feed showing at the top right corner of the content area. This will change as other Content Blocks are shown.

Changing Active Content Blocks

You can change active Content Blocks by clicking the Play button in the center of each block. This is usually done in sequence, from top-to-bottom, but active blocks can be changed at any time and in any order. You can also still drag and drop Content Blocks to reorder them, as needed.



Live Chat

The Chat Box, opened by clicking the Chat icon in the main toolbar at the top right of the window and located on the right side of the screen, is the main form of communication between your Attendees and your Presenters.

Incoming comments and questions will come into this window in real-time and can be responded to either by typing your answer, or verbally by the Presenters, as you see fit.

Presenter-Only Private Chat

The Presenter Chat Tab is a private tab not seen by Attendees. This is for behind-the-scenes chat for room Organizers and Presenters ONLY.

Removing Unwanted Messages

You can remove any unwanted messages from the Live Chat view by clicking the Edit icon at the top of the chat log and then clicking the Delete icon next to the message you want to remove.

Note these messages will still be visible in the Chat Transcript generated after your webinar.

Ending the Webinar

Once the webinar is over, you will click the End Webinar button at the bottom of the Storyboard Content Block list. *(it replaces the End Prep Mode button during a Live Webinar)*



Much like in Prep Mode, all Participants will be removed from the webinar environment and placed on the Flow Exit Page. If you set up a custom webpage in your Advanced Event Settings, all Participants will be redirected to that site.

Section 6 - Post-Webinar Items



After your webinar, the Webinar Event Card will be placed in the Past Events section automatically. From there, you can view your post-webinar Report, duplicate the event for future use, or even delete any unwanted records, if desired.

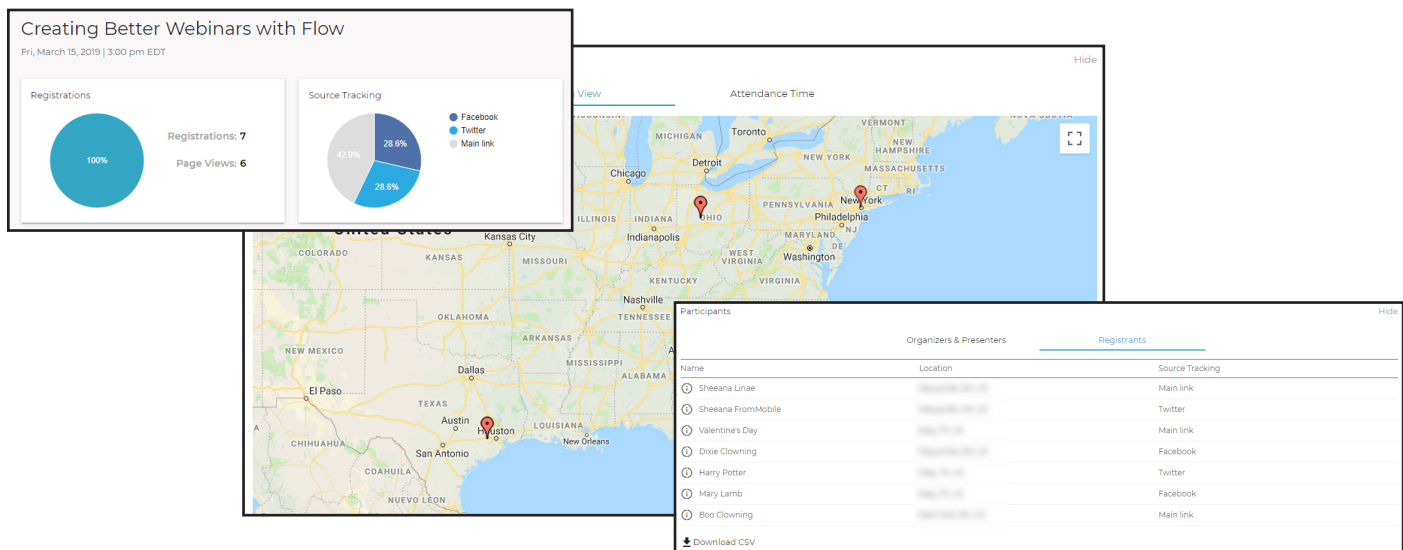
Viewing Replays

If you set up a Webinar Event to record, the Replay can be viewed after the webinar ends by clicking on the Replay link on the Webinar Event Card. This will load an MP4 version of the webinar as it happened live, which can be downloaded and shared however you like.

Also, any registered Attendees can use the original event link, sent to them in their confirmation email, to view any Replays for themselves, on-demand.

Collecting Report Data

Clicking on the Report link will bring you to the complete Webinar Event Report page. The data here can be downloaded as either a PDF or as individual Excel spreadsheets (CSV), depending on what specific data you need.



What if I need more help?

Visit <https://support.flowapp.com> to search our knowledgebase or open a support request.

Flow Knowledge Base

This resource will be available to you 24/7 and will have searchable links to helpful news articles and other information about using Flow. Please come here anytime you need to answer your questions.

Live Chat is also available 9am-4pm US ET, for urgent issues.