

FOR MILKSHAKE CUSTOMERS

How Milkshake OS works.

The complete guide to your platform: your brand, your events, your AI staff, your money, and your show week — end to end.

CONTENTS

What's in this guide

PART	WHAT IT COVERS
1 Your platform, your brand	Brand setup with AI extraction, sending email from your own domain, your web address, choosing your modules
2 Your event, end to end	Creating an event, legal documents, the floor plan, tickets and registration, your public event website, inviting exhibitors
3 Your AI staff	Every agent: what triggers it, what it produces, what its autonomy dial means — and the Approval Inbox where it all lands
4 Money	Connecting Stripe or Square, bank payments, the no-processor path with reference codes, recording checks, where every dollar shows up
5 Your people	Exhibitors, contracts and compliance, sponsors and their reports, volunteers
6 Show week	Check-in and badges (including offline), incident reporting, the war room, the run-of-show board
7 After the show	The automatic debrief, exhibitor results dashboards, re-booking and sponsor renewal
8 Help, FAQ & glossary	The instant-help assistant, the Getting Started track, real answers to real questions, and what the words mean

NEW TO MILKSHAKE?

The in-app Getting Started track walks you through setup in twelve short steps with checkmarks — find it on your Help page. This guide is the deeper companion: read it cover to cover, or jump to the part you need.

PART 1

Your platform, your brand

Milkshake OS is white-label from the ground up: your team, your exhibitors, and your attendees see your organization — your logo, your colors, your domain, your name on every email and contract. Every setup step lives under the gear icon (Settings) in the top-right corner.

1.1 Brand setup — start with one field

1. Open `Settings → Organization Branding`.
2. Enter your website address and click `Extract my brand`. The platform reads your site and proposes your logo, brand colors, and fonts.
3. Review the proposal. Adjust any color with the pickers, or upload a different logo — the extraction is a head start, not a commitment.
4. Save. From this moment your dashboard, login screen, portals, emails, and generated documents all wear your brand.

The “Powered by Milkshake OS” line in email footers can be turned off on the same page if your plan includes full white-label. Everything else — headers, colors, signatures — is always yours.

1.2 Send email from your own domain

Out of the box, platform email sends from a Milkshake address with your name on it. To send from your own domain (hello@yourbrand.com), do a one-time verification:

1. Open `Settings → Email & Domains` and enter the domain you want to send from.
2. The page shows the DNS records (usually three) to add at your domain registrar — GoDaddy, Namecheap, Cloudflare, wherever you bought the domain. Each record has a copy button.
3. Why these records? They let you authorize a sender. One proves ownership; the others (SPF and DKIM) tell inboxes your email is legitimate — they keep you out of spam folders.
4. Paste the records at your registrar, come back, and click `Verify`. Verification usually completes in minutes; DNS can occasionally take a few hours.

Once verified, every email the platform sends — confirmations, contracts, invoices, broadcasts, agent follow-ups — comes from your domain.

1.3 Your web address

Want the platform and your public event site to live at an address like events.yourbrand.com? Open the `Your own domain` card on the Branding page, enter the address, and follow the DNS instructions shown (with copy buttons). Click `Precheck` to confirm your records are correct — the platform verifies your DNS live, so you're never guessing. Once your precheck passes, our team activates the domain, typically within one business day, and everything — portal links, signing links, your event website — rides your address.

1.4 Choose your modules

Not every event needs every tool. `Settings → Modules & AI Agents` lists everything the platform can do — turn off what you don't use and it disappears from navigation for your whole team. Nothing is deleted: flip a module back on and its data is exactly where you left it. The same page holds your AI agents and their autonomy dials — more on those in Part 3.

PART 2

Your event, end to end

2.1 Create the event

An event holds everything: dates, venue, floor plan, tickets, exhibitors, volunteers, agenda, website. Create one from the dashboard, fill in dates and venue, and the first-run checklist appears — a card that walks you through the rest of this part in order and checks items off as you go.

2.2 Legal documents

`Settings → Legal Documents` holds your event's waivers, terms, and photo releases — editable, versioned (you can always see what an attendee agreed to and when), and automatically attached where they belong: registration, volunteer sign-up, check-in. Contract wording lives in `Settings → Contract Templates`, covered in Part 5.

2.3 Floor plan & booth pricing

Import your venue's CAD floor plan or draw one from scratch, and lay out booths in the floor plan editor — best on a desktop screen. Then open Booth Marketplace settings to make the plan transactional:

1. Turn on self-serve sales if you want exhibitors to buy booths directly from the live map. You can keep some booths request-only and approve those sales yourself.
2. Set pricing per booth or per section — corners premium, perimeter mid, interior standard is a common pattern.
3. Set the reservation window (default 10 minutes): when an exhibitor taps a booth, it's held for them while they check out. If they walk away, it releases automatically.

Two buyers can never hold the same booth, and every open map updates live the moment a booth is held or sold.

2.4 Tickets & registration

Set up ticket tiers (free and paid), promo codes, and group registration (2–20 people in one checkout). Waitlists open automatically for sold-out capacity. Registration runs on your event website, on a widget you can embed in any other site, and imports cleanly from Eventbrite if you're moving an existing event. Every confirmation email is branded, and every paid ticket reconciles into your financial reporting automatically.

2.5 Your public event website

Open `Settings → Event Website`. The site assembles itself from your event's live data — agenda, speakers, exhibitor directory, tickets, sponsors, venue and hotels — so it never goes stale.

1. Click `Write it for me`: AI drafts your headline, about section, and a starter FAQ from your event's real facts. It only uses facts it can see.
2. Edit anything. The drafts are suggestions in editable fields, and you can regenerate any one of them.
3. Turn sections on or off, reorder them, and add custom sections (text, image, FAQ, banner) between the data-driven ones.
4. Click `Publish`. Until you do, the site is private. Once live, it sells tickets directly — and if self-serve booths are on, it links exhibitors straight into the marketplace.

2.6 Invite exhibitors

Add exhibitors (or import a list), and each gets a branded portal invitation. From there the pipeline takes over: booth selection or request, contract, payment, onboarding — with your Contract & Follow-Up agent doing the chasing (Part 3) and every step visible on the Pipeline board.

PART 3

Your AI staff

Milkshake's agents do the operational work an event normally hires for — and every one of them reports to you. Two ideas make the whole system trustworthy.

THE AUTONOMY DIAL

Each agent runs at the level you choose. **Draft** — it prepares work, you send it. **Approve** — it queues finished work, you approve in batches with one click. **Autonomous** — it acts on its own, with every action recorded in a full audit trail. One rule you can't turn off: anything involving money, contracts, or someone's records always requires your approval, no matter where a dial is set.

THE APPROVAL INBOX

Every agent's queued work lands here, grouped by agent, each item showing what it wants to do, why, and its confidence. Approve one, approve a batch, or reject with a note. Most customers run a five-to-ten-minute morning sweep.

3.1 The sales & compliance team

Booth placement. On the marketplace, an exhibitor taps “Find my best spot” and gets three ranked booths with plain reasons. The ranking is pure math (distance from competitors, proximity to entrances, corner positions); the AI writes the explanation. Their tap reserves; the AI never buys anything.

> SAMPLE
>
> “Booth F8 — no other landscaping vendors within 60 feet, second-highest traffic corridor, corner position.”

Contract & Follow-Up. When a booth request comes in, it verifies availability, drafts the contract with every detail filled in, and queues the send for your approval. Unsigned after your set window? It drafts a warm nudge, then an urgency note citing the real expiry, then — with your click — releases the hold and offers the booth to your waitlist. After signing, it chases payment on your schedule and queues the onboarding email the moment payment lands. It pauses automatically for anyone whose payment is already on its way.

Compliance review. The moment an exhibitor uploads an insurance certificate, AI reads the document and fixed rules check it against your event's requirements — coverage amount, additional insureds, expiration versus your teardown date. Rejections always wait for your one-click approval, because they carry precise reasons:

> SAMPLE
>
> "Your COI needs revision for two reasons: (1) the additional insured does not list Riverside Convention Center; (2) coverage expires March 2 — the event teardown is March 14."

3.2 The communication team

Exhibitor concierge. Answers exhibitor support tickets from live data — "what size is my booth?", "why was my document rejected?", "is my invoice paid?" — in your voice, in seconds. Anything touching refunds, contract changes, or records always comes to you first.

Attendee assistant. Lives in the attendee app's Ask tab: schedules, wayfinding, their own favorites. It can only see public event information and the asking attendee's own registration. Anything that sounds like an emergency skips the AI entirely and shows your emergency contact card.

3.3 The operations team

Volunteer scheduler builds the entire shift schedule in seconds — skills, availability, no double-booking — as one draft you approve. Then it watches: understaffed shifts trigger recruiting proposals, day-of no-shows trigger backup suggestions, and confirmed volunteers get automatic reminders.

Run-of-show turns your agenda into a minute-by-minute cue sheet, nudges each cue's owner before their moment, and — when something slips — computes exactly which items move and by how much, proposing the recovered timeline for your approval.

Budget forecaster tracks plan vs. actual vs. projected across your categories, alerts you when a category drifts past your threshold, and sends a weekly digest. Every number traces to a real transaction.

The war room dispatcher is covered in Part 6; the post-show agents in Part 7.

PART 4

Money

Every payment — tickets, booths, invoices, upgrades — flows into your accounts through whichever setup fits your business. Configure it once in `Settings → Payment Settings`; every pay button in the platform uses your choice automatically.

4.1 Option one: Stripe

1. Click `Connect with Stripe` and step through Stripe's own onboarding (or sign into an existing account) — about ten minutes the first time.
2. Buyers pay by card, Apple Pay, or Google Pay on your branded checkout; money settles to your bank on your Stripe payout schedule. Milkshake never holds your funds.
3. Optional: turn on bank payments (ACH) — buyers pay directly from a bank account at a fraction of card fees.

4.2 Option two: Square

Prefer Square? Click `Connect with Square` and authorize your account. Cards run through Square's checkout, bank payments are available too, and the rest of the platform works identically.

4.3 Option three: no processor at all

Plenty of event money moves by check and wire — especially large exhibitor and sponsor payments. Milkshake treats that as a first-class path:

1. Add your bank instructions once in Payment Settings; they appear on invoices and payment pages.
2. Every invoice carries a unique reference code — for example SUM-000482-K7Q2R — so payments match themselves to invoices.
3. The payer clicks “I've sent payment” on their invoice page. You're notified, and the invoice moves to a pending-verification queue.
4. When the money shows up in your bank with the reference code, click `Confirm`. Receipts go out, portal access unlocks, and records update automatically.
5. Handed a check at the show? Use `Record external payment` on any invoice (check, cash, your own terminal) and the same automation runs.

4.4 How bank payments behave

Bank transfers take 3–5 business days to clear. During that window the payment shows as processing, and nothing is finalized: a booth paid by bank transfer isn't marked sold, and portal access doesn't unlock, until the money lands. If a transfer fails, everything reverts cleanly and the payer is asked to try again. Reminders pause for anyone whose payment is processing.

4.5 Where every dollar shows up

Every payment — card, bank, wire, check — lands in one ledger and flows into the same places: the invoice it pays, your financial reporting, the budget forecaster's actuals, and the post-event P&L.

PART 5

Your people: exhibitors, sponsors & volunteers

5.1 The exhibitor's experience

They receive your branded invitation, browse the live floor plan, and tap a booth (or ask for a recommendation). The booth holds while they confirm company details, review the contract, sign on screen — phones work — and pay. Their portal then unlocks with a checklist: insurance certificate, logo, booth details, deadlines. From then on the portal is their home: documents, invoices, orders, support — and, after the show, their personal results dashboard (Part 7).

5.2 Contracts — your language, locked when signed

`Settings → Contract Templates` holds the wording of all three agreement types — exhibitor contracts, speaker agreements, and promotional partner agreements. Paste in your lawyer's language and insert merge fields — booth number, price, event dates, your legal entity — that fill automatically on every generated contract. Every save keeps history.

SIGNED MEANS SIGNED

The moment a contract is signed, that exact document is locked. Editing your template afterward changes future contracts only — nothing can alter an executed agreement.

5.3 Compliance, from both sides

You set the rules per event: required documents, minimum liability coverage, who must be named as additional insured. Exhibitors upload from their portal (a phone camera works), the compliance agent reviews within seconds, and your dashboard shows every exhibitor and every required document at a glance — missing, pending, approved, rejected, resubmitted. Exhibitors see their own status and exact rejection reasons.

5.4 Sponsors — packages, delivery, proof

1. Build packages in Sponsorship Packages: name, price, inventory limit, and a deliverables template.
2. Share the auto-generated public prospectus page — a branded one-pager of your packages, with PDF export.

3. Assign a package to a sponsor: its deliverables become a tracked checklist (pending → scheduled → fulfilled), with overdue highlighting and completion percentage.
4. After the show, the sponsor renewal agent turns that record into an impact report (Part 7).

5.5 Volunteers

Define shifts (role, location, times, minimum headcount, required skills); volunteers apply with availability and skills; the scheduler drafts the whole assignment grid for your one-click approval. The Coverage Dashboard shows every shift green, yellow, or red through show day. Reminders go out 24 hours and 2 hours before each shift automatically.

PART 6

Show week

6.1 Check-in & badges

The check-in station works well on iPads: it scans tickets, searches by name, and prints badges from your templates. It keeps working if the venue Wi-Fi drops — attendee data syncs to the device before doors, check-ins queue offline, and everything reconciles when the connection returns.

6.2 Reporting a problem from the floor

Any staff member or volunteer opens **Report Incident** on their phone — a sentence, optionally a photo: “Booth 214 has no power.” What happens next is the dispatcher's job:

1. AI classifies the report — type, severity, location — in seconds.
2. It ranks who should respond: on shift now, the right role, closest, least loaded. The ranking is pure math; the AI writes the dispatch message.
3. The chosen responder gets a push notification with the what and the where.
4. No acknowledgment within a few minutes? The next candidate is proposed automatically. Every step lands in the incident's timeline.

THE SAFETY RULE

Anything that sounds medical, fire, or security is forced to critical severity by rules the AI cannot override — you're alerted immediately, every time.

6.3 The war room & run-of-show boards

War Room is your live incident board: severity lanes, who's assigned, acknowledgment status, time open, one-tap escalation. **Run-of-Show** is the show clock: your cue sheet with a live now-line. When a session runs long, the agent computes the ripple and proposes the recovered timeline; you approve, everyone affected is notified. If a slip would collide with something fixed (doors, teardown), it escalates to you instead. During a critical incident at a location, cue nudges there pause automatically.

PART 7

After the show

7.1 The debrief

Click `Generate debrief` and the agent assembles the full retrospective from your event's own data: attendance and arrival curves, sessions ranked, exhibitor lead results, financial plan vs. actual, volunteer fill rates, survey scores — and what attendees said, grouped into themes that link to the real comments. Each recommendation cites the finding it comes from:

> SAMPLE
>
> “Expand food options — 8 of 36 written comments mentioned limited food and beverage.”

You review and approve it, then export the branded PDF or share it by email.

7.2 Exhibitor results dashboards

Every exhibitor's portal gains a `My Results` card: leads captured (with a per-day chart), cost per lead, and how they ranked as a percentile against the event — without ever exposing another exhibitor's identity or numbers. A branded PDF export makes it easy to share with their team.

7.3 Re-booking & sponsor renewal

Two to three weeks after the show, launch the re-booking campaign. The agent groups exhibitors by their actual results — strong performers get an early-bird offer citing their own numbers, solid performers a standard renewal, and those who struggled a consultation offer. Every message is drafted from real data, and you approve each wave in one click.

> SAMPLE
>
> “Your team captured 51 leads at Summit — top quartile — and your corner location clearly worked. We'd love to hold priority for you next year…”

Sponsors get an impact report first: what they sponsored, delivery status on every promised item, and real reach numbers — where something wasn't measured, the report says “not tracked this event” rather than estimating. The renewal proposal follows, with your approval on every send.

PART 8

Help, FAQ & glossary

8.1 Where to get help

The instant-help assistant sits on every support page. It answers how-to questions with links to the official help articles and won't guess: if something isn't documented, it says so and offers a one-click ticket with your conversation attached. The Getting Started track on your Help page is the twelve-step guided setup. Support tickets reach a person anytime.

8.2 Real questions, real answers

QUESTION	ANSWER
What happens if a bank payment bounces days later?	Nothing was finalized during processing, so everything reverts cleanly — the invoice reopens, the payer is asked to try again, and reminders resume.
Can exhibitors see each other's results?	No. Each exhibitor sees their own numbers plus anonymous event context — never another exhibitor's identity.
Can the AI spend money or release a booth on its own?	No. Money, contracts, and record changes always require your approval, regardless of any autonomy setting.
If I edit a contract template, do signed contracts change?	Never. Signed contracts are locked at signing. Template edits affect only contracts generated afterward.
What if the venue internet goes down at the doors?	Check-in keeps working offline and reconciles when the connection returns.
Can an attendee ask the assistant about another person?	No — it can only see public event information and the asker's own registration.
Do I have to use the AI agents?	No. Every agent can be turned off, and any agent can run at Draft, where you send everything yourself.
Who owns my data?	You do. Your organization's data is kept separate from every other customer's and is exportable.

Can I switch payment processors later?	Yes — disconnect one and connect the other in Payment Settings. Past payments and reporting are unaffected.

8.3 Glossary

TERM	MEANING
Approval Inbox	The one place where all AI-agent proposals wait for your review.
Autonomy dial	Per-agent setting: Draft, Approve, or Autonomous. Money and records always require approval.
Merge field	A placeholder in a contract template — like booth number or price — filled automatically on each contract.
Reference code	The unique code on each invoice that matches a wire or check to it for one-click confirmation.
Reservation window	The minutes a tapped booth is held for a buyer during checkout (default 10).
ACH	Direct bank-account payment. Cheaper than cards; takes 3–5 business days to clear.
COI	Certificate of Insurance — proof of required coverage, reviewed automatically against your rules.
White-label	The platform wears your brand everywhere — your stakeholders see your organization.
Module	A feature area (volunteers, marketplace, budgets…) you can turn on or off.

One platform. One login. One inbox.

Questions this guide didn't answer? Ask the instant-help assistant on any support page — or open a ticket and a person will take it from there.

© 2026 Milkshake OS · milkshakeos.com · Describes platform capabilities as of October 2026.