

Office of CME, CE & CPD

Managing Audience Members in CrowdCompass – Job Aid

The release of CrowdCompass mobile app to a CME event Audience requires five processes to occur in order:

- ____A. CONFIGURE the event's invitation email template in CrowdCompass
- ____B. PUBLISH the CrowdCompass mobile app to allow Exhibitor preview and send in booth corrections
- ____C. IMPORT the event Registrants (single or list) into CrowdCompass
- ____D. INVITE button in CrowdCompass sends out the invitation (listed in a.) and Log-in credentials to Registrants
- **____E.** EMAIL the announcement of the mobile app to Attendees (using CloudCME or Outlook).
- ____F. Repeat processes C, D, E for all late registrants

Step by Step checklist for Process #C "IMPORT"

- 1. Export the event registrants from the CloudCME Registration Report as XLS (data tab of the report screen).
- _____2. Check the CrowdCompass "Invited Attendees" list.
- 3. (avoid duplication) Remove from the Exported XLS list any exhibitor reps names who are already listed in the CrowdCompass event.
- 4. Delete all the CloudCME data columns except MemberID, First, Last, Email, and Degree. (See "Column Mapping Diagram" below).
 - 5. Download the CrowdCompass XLS template from within the Invited Attendees panel of CrowdCompass.
- The Import will only work using a template downloaded from Crowd Compass Get the CSV template Get the Excel template
- 6. Copy the attendee list lines from your Exported XLS file. Paste these lines into CrowdCompass template.
- _____7. Align the Excel columns as shown in the Column Mapping Diagram below.
- 8. Fill down the column for "Show on Attendee List" as Yes, (use Ctrl-D the fill down command).
- _____9. Import the resulting template with names into the audience management tab of CrowdCompass.
- 10. Note: Added attendees will show a status Pending until the attendee's first log-in to the mobile app, changes status to Confirmed. The Actions column of the Invited Attendees page has a button to Send New Invitations (to a group) or to individuals ("Send Invite" icon). After

the batch import, you must remember to add Late registrants by the same process above, but without duplicating previous imports.



Figure 1. Invited Attendees Screen in CrowdCompass



Figure 2. Column Mapping Diagram

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• Review the documentation to see which fields are required for an individual record in CrowdCompass \rightarrow <u>View Documentation</u>