# CrowdCompass Initial Event Setup and Configuration:

Log in as administrator at: <https://v3.eventcenter.crowdcompass.com/admin/events/FQKcGer2O2/organizations?table_page=1>

**To create a new event, contact** [**Samantha.Phillips@nyulangone.org**](mailto:Samantha.Phillips@nyulangone.org) **Grossman CME office sets up the new event for us in Crowd Compass. Provide her with the Event Details needed to do so:** Name, Short name, Description, Starting/Ending Date

Check these settings once she has given you access:

**Privacy:**

* Under event settings, set a password
* Account types = Invite Only
* Attendee Profile Settings= Visible

**Social Sharing**

* Full sharing
* Enable Document sharing
* Enable commenting

**Attendee Options**

Enable Profile Setup Wizard

Enable Adjustable Time Zone

Attendee Sorting by Last Name

Session settings

Disable Session Ratings

Enable Add to Schedule

Disable Check in

Appointment Settings – Crowd Compass Built-In Appointments

Attendee Messaging ON

My Badge (enabled for live events, disabled for virtual events)

**Compliance**- leave default settings in place

**Design:**

**Event Icon**- Create & Upload an event Icon 100 x 100 PNG

**Splash screens** – Create & upload Mobile (1242x2208 px) Tablet portrait (1536x2048 px), and Tablet Landscape (2048x1536px)

**Banners-** create & upload Mobile phone banner (640x150px) and Tablet/Online banner (552x150px)

**Theme and Icon Pack, Custom Colors-** keep as defaulted by NYUMC

**Navigation Icons-** keep as default, point Virtual Exhibit Hall to category: Organizations, filter listed by name

**Customize Emails-** Edit Master Template (upload same image as Tablet/Online banner (552x150)

Set Home Page Settings to **Dynamic Event Guide**

**Content**

**Sessions-** insert or import all agenda sessions and timed breaks. Insert Featured Exhibitor Sessions as needed (as specified by the paid exhibitor’s setup checklist

**Speakers-**Insert or import all speakers with names, emails, photos, and bios if available.

**~~Organizations~~Exhibitors-** Insert an exhibitor for each package sold, and use the Advanced button create or modify the sponsorship levels available.

**Pages**- Insert pages for **CME Contact Information,** **CME Information and Disclosures** (with PDF specific to each event), **Course Webinar Link** (specific to each event), **Credit Instructions** (with PDF specific to each event), and **Live Webinar Information**

**Interactive Features**- Create notifications ordered by Exhibitors, and surveys/polls as designed by course director

**Attendees tab-** 48 hours before event, import the spreadsheet of registrants from CloudCME, into CrowdCompass

**As a final step of configuration, but not before, go to Event Settings** and Publish Event. Once the event is Published, many of the above settings cannot be changed, so be sure you understand the timing and impact of publishing the Event.

# Exhibit Sales Workflow

1. Prior to any Exhibitor offering being sent, [**the Exhibit Products, Features included, and Prices must be set up in CloudCME**](file:///\\homedir-cifs.nyumc.org\assets\winthrop\LISom_Downloads\7_CME_Tools\How_to_Setup_Exhibitor_Registration_for_CME_Programsv3ps.pdf)**,** as well as the limit quantity available to be sold at each level. A test sale should be run by internal staff to verify the registration e-commerce works properly.
2. **Prepare an Exhibitor PDF packet** containing the pricing levels page, the “[Virtual Exhibit information LISOM” slide deck](file:///\\homedir-cifs.nyumc.org\assets\winthrop\LISom_Downloads\7_CME_Tools\Virtual_exhibit_information_LISOM.pdf), and an offering letter. Send this packet to all vendor companies specified by the CME course director’s target list, as well as past exhibitors in related therapeutic areas.
3. **To initiate a sale**, the Exhibitor first registers as an exhibitor, provides payment information (with credit card or initiates EBT payment), and signs the online LOA. NYUMC staff are not permitted to register on the Exhibitor’s behalf, as they will not be able to agree and consent to the LOA code of conduct. No packages can be held or reserved without payment
4. CME office staff edits Exhibitor’s member profile in CloudCME to show company name in the Registration Report. CME office staff emails the [Exhibitor Setup Checklist](file:///\\homedir-cifs.nyumc.org\assets\winthrop\LISom_Downloads\7_CME_Tools\Checklist_for_Building_your_Virtual_Exhibitor%20Booth_fillable.pdf) to the exhibitor
5. Once Exhibitor returns their Checklist order and digital materials, CME office opens up virtual exhibit organization within the CrowdCompass App, and attaches the appropriate digital materials using the **Content|Organizations** and **Content|Pages** Tab
6. CME office imports the exhibitor’s name into the CrowdCompass App to allow them access, and issues the online invitation within CrowdCompass
7. CME office sends exhibitor a preview access link to the App to verify that Exhibit Booth meets their order, and asks them for feedback or signoff
8. CME office executes any changes requested by Exhibitor, then releases App to audience.

# **Exhibitor Frequently Asked Questions (FAQ)**

**Can we create a Featured session in the exhibit app to showcase our corporate video?**

**Yes, but** the app only supports embed code from four streaming sites: YouTube, Vimeo, Wistia, or Facebook). Please provide upload your videos (we recommend YouTube Unlisted) and provide us with URLs so that we can embed them.

**Can we measure traffic coming to our company website from our exhibitor booth using tracking tags?**

If you would like to provide us versions of all your desired URLs that have your tracking parameters appended, we can load them into the Booth for you to preview, and you can test whether your Omniture receives the clicks off of them.  Our CrowdCompass app does not seem to BUILD tracking specifically for Omniture, but it should HANDLE any dynamic links you give us just fine. There does not appear to be a character limit (length) on URLs.

**Can we see a demo version of the audience app before we decide?**

Exhibitors are welcome to preview other Booths we provided recently to get an idea of how various companies have chosen to utilize their preferred marketing presence:

### [https://crowd.cc/endoscopy20](https://urldefense.proofpoint.com/v2/url?u=https-3A__crowd.cc_endoscopy20&d=DwMFAg&c=HdAUNv_EOZyljLc1cjbHCq-Eo7r1kRHoywhQbi81uaA&r=mc_qxL5W1KOvsDahviLzXarXY75K_b2feTf90VcKvr4&m=RNc05Wo-u2JLvvQvZodPjrEtFTU99k4DhzGJsZOQiO8&s=I1SIl1hEQ_ew-247FTjQ5WgjTGjgdzDeYo0QykoF734&e=)

**Event Password:** Endoscopy2020

**Can you provide screens shots of both a mobile and desktop version of the layout and how to access them, or a staging link that we can mock up ourselves?** We can provide exhibitors with VIP Admin access allowing you to make changes directly to your online Exhibit page. This will give you the most level of control over your exhibit appearance. Or if you prefer we can assemble the page for you.

**When does the audience begin to visit my booth?**

We will release the audience app (CrowdCompass) to the audience 7 days ahead of the event so that exhibitors have up to 7 days to interact with audience prior to the conference.  Exhibitor Booth is fully customizable over time, but we strongly suggest that your main exhibit elements be loaded prior to 9/18. Excellent thank you!

**Can we have more information surrounding the attendee survey? Is there a template we can use? Or an example to share?**

Attendee survey/Contact Me written is a form built externally and linked into your page. We suggest that you build it using a Customer Relationship tool like SurveyMonkey, GoogleForms, or Qualtrics; or if your company has am existing Contact me Form on its website, we can link to that.

**For the downloadable files, is there a separate section for these?**

Download links appear at the bottom of your booth page, each PDF must be 10MG in size or less, unlimited number of uploads. Please provide short descriptions of each file, up to 100 characters.