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.**

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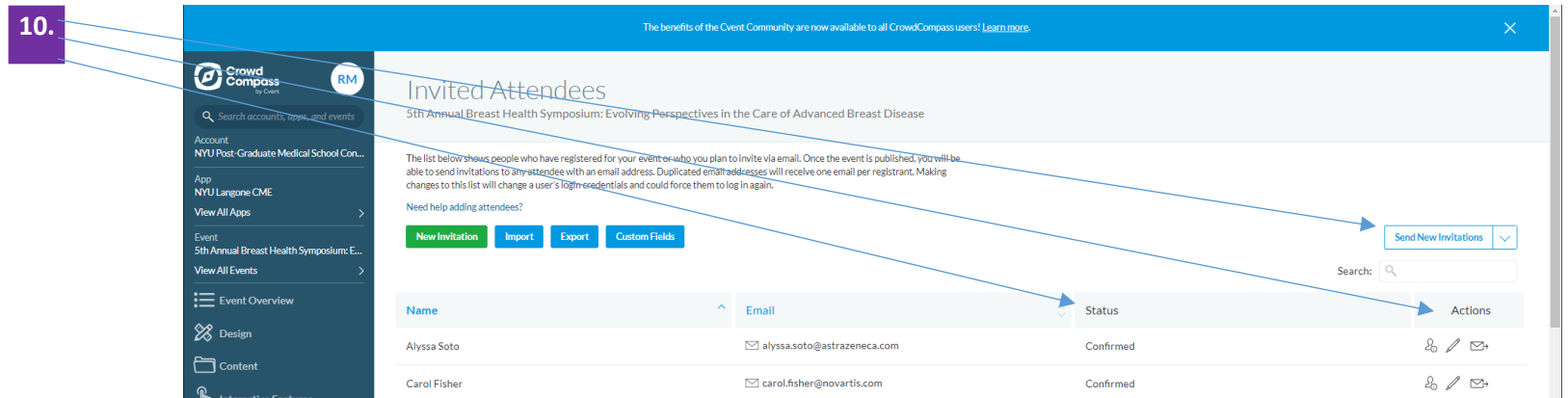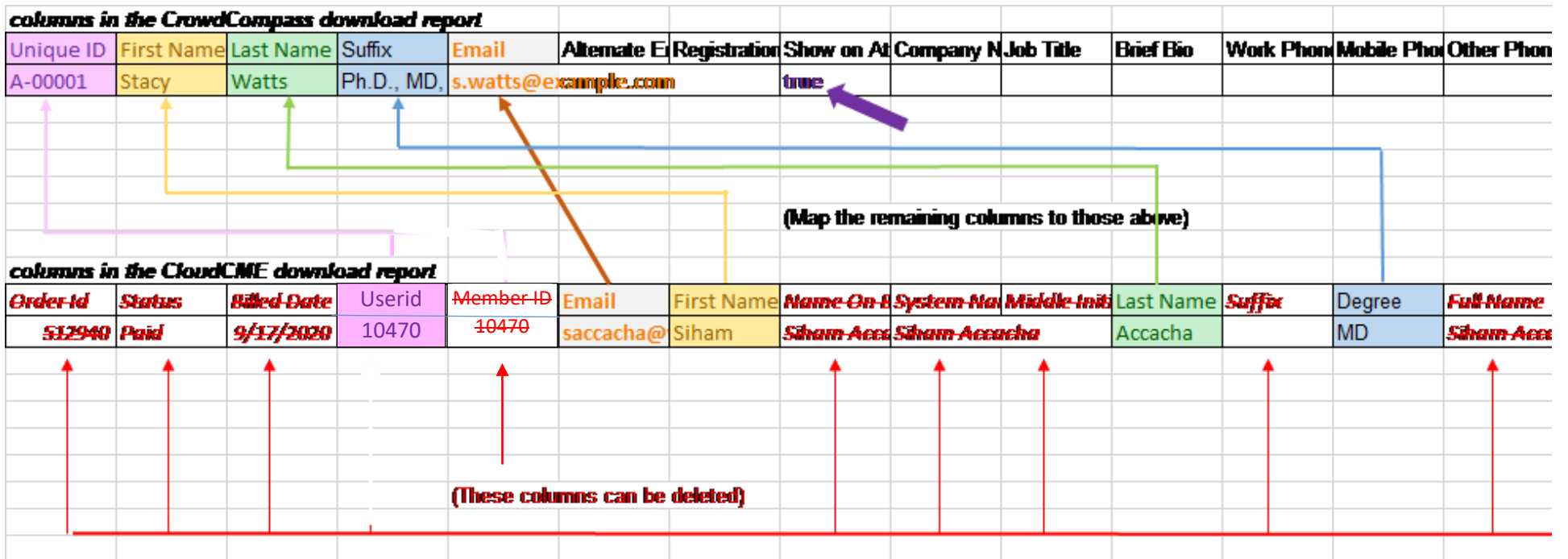*Figure 1. Invited Attendees Screen in CrowdCompass*

Figure 2. Column Mapping Diagram

- *Review the documentation to see which fields are required for an individual record in CrowdCompass→ View Documentation*