

# Libraries

Learn about how to populate the different libraries available within the CMS and how these link through to your modules.

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# People

The people library will play a role in every event as the repository for user profile information and for controlling access to the platform. The videos below break down the different parts of this library in the order they appear in the CMS and provide best practices on how to use them for your event.

Users have controls at login to choose if they would like to be visible in the platform and to update their profile.

## People List

This is where user profiles can be created and edited, with the email address being a unique identifier that must be different for every user. When a platform is set to secure, this is also the master list against which the email address of any user attempting to login is cross-checked. If the user's email is not recognised they will receive this message:

You do not have access to this application. If you believe this to be a mistake, please contact your representative.

This still applies for users who have backend access to the CMS and so one of the first steps of any build should be to add yourself and any other members of your team who intend to work on/use the platform, so that you are able to login to the frontend.

## People Groups

Creating and allocating users to groups allows you to personalise what they can see on the home page, menu and in the agenda. You can also send targeted comms to specific groups.

# People Tags

# People Fields & Custom Fields

# Import People

The "Import People" function enables the bulk import of users and profile data via spreadsheet upload.

## Using "Import People" for Bulk Uploads or Edits

## Import People Groups

The "Import People Groups" function uses a different spreadsheet and enables you to change the groupings users belong to in bulk, however users must have already been added to the platforms manually or using the above import.



# Companies

The Company library is where you can create and populate the booths that can then be displayed virtually in the "Company Display" Module, or linked to directly.

The videos below will walk you through each area of this library and how to use them when building your event platform.

## Company List

Here you will see a list of previously created companies, which you can edit, along with options to "Add new company" or to "Export companies".

## Company Groups, Fields and Custom Fields

Here you can create groups which companies can then be assigned to for display purposes.





Note that these company groups are a separate function to the "People Groups" and cannot be used for targeting alerts or setting module/session privacy.

On the next tabs you will find toggles for controlling which company fields are visible by default, as well as being able to create your own custom fields if you need additional control or flexibility over what can be added to a Company profile.

## Importing Companies

In this video we discuss bulk uploads and edits of companies using the import functionality.

## Company Exhibitor Self-Edit Portal

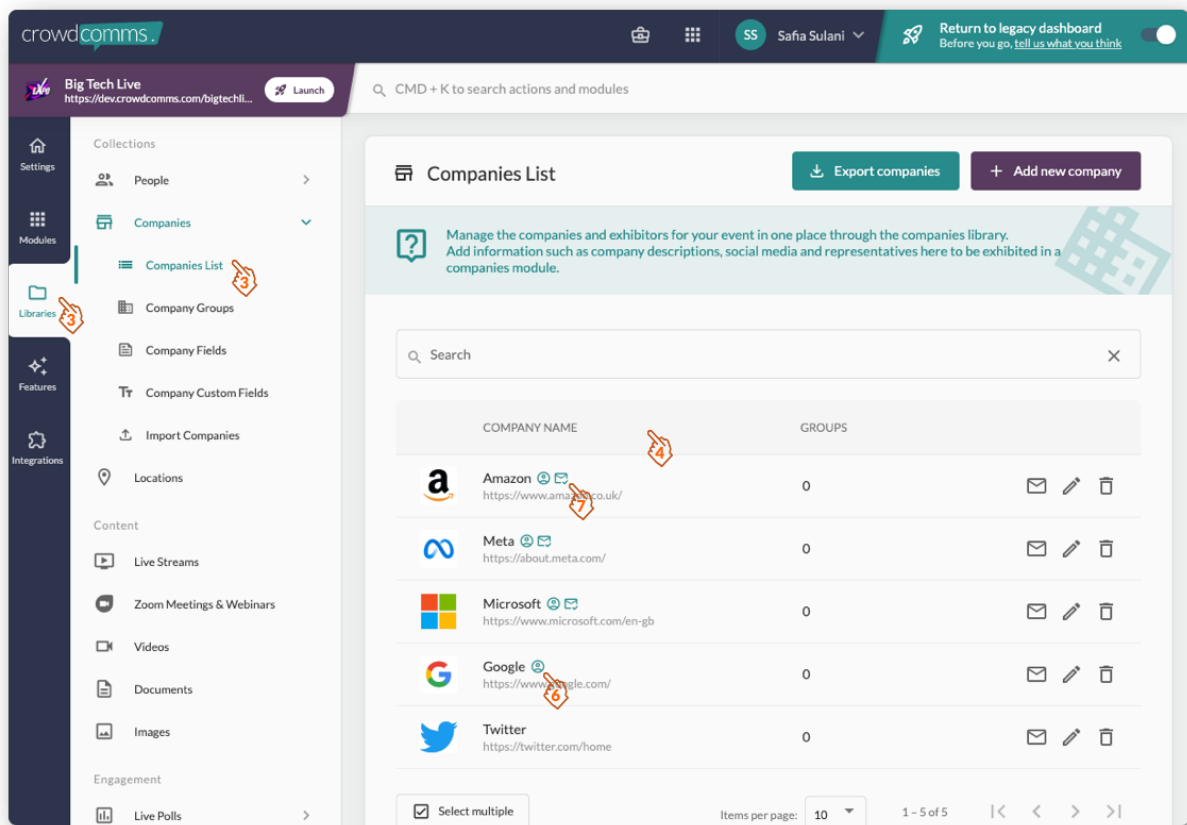
If you run events with hundreds of sponsors and exhibitors and find yourself spending days updating company info, logos and branding, we have a solution for you!

Let us introduce you to CrowdComms Exhibitor Portal. The Portal allows you to pass on the responsibility of updating company booths to your exhibitors. As the Dashboard admin, you simply need to add the company names along with the main representatives, and anyone with the link can update their company booths.

This guide will show you how to send the Exhibitor Portal link to your event's Sponsors and Exhibitors.

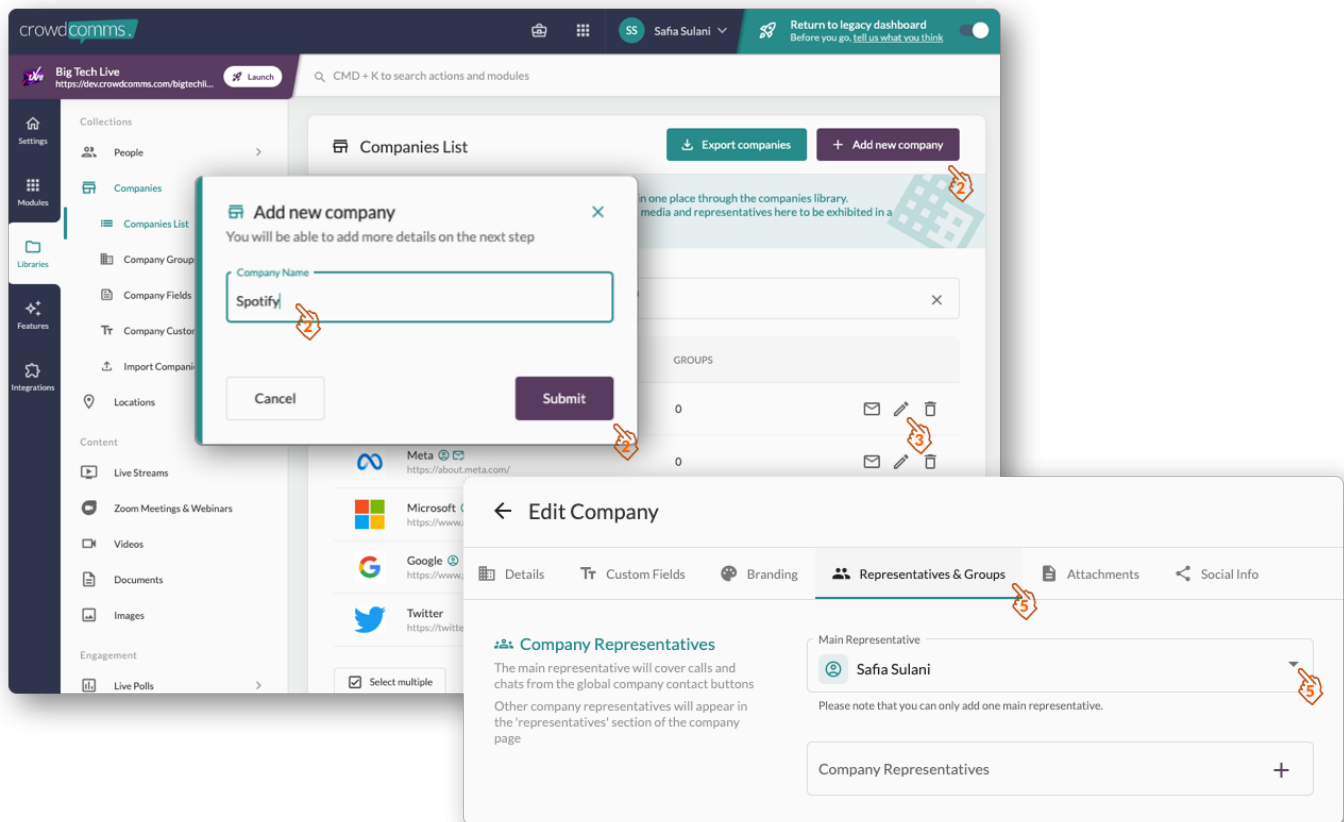
First, you will need to log into your CrowdComms Content Management System (CMS) Dashboard and input your details.

1. Once you've logged in, choose the Event App that you want Exhibitor Portal to be used in.
2. Go to the 'Libraries' tab, then 'Companies' and click on the 'Companies List' that appears as an option in the secondary menu.
3. If you have added companies to your App, they will appear in the list. If not, refer to the section below on how to add a company to your Dashboard.
4. In your list of companies, you will see new mini-icons next to the company's name.
5. If you have linked the company's representative to the company, you will see the person's mini-icon.
6. If you have sent out the link to the Exhibitor's Portal to the company's main representative, you will see a mini envelope icon.



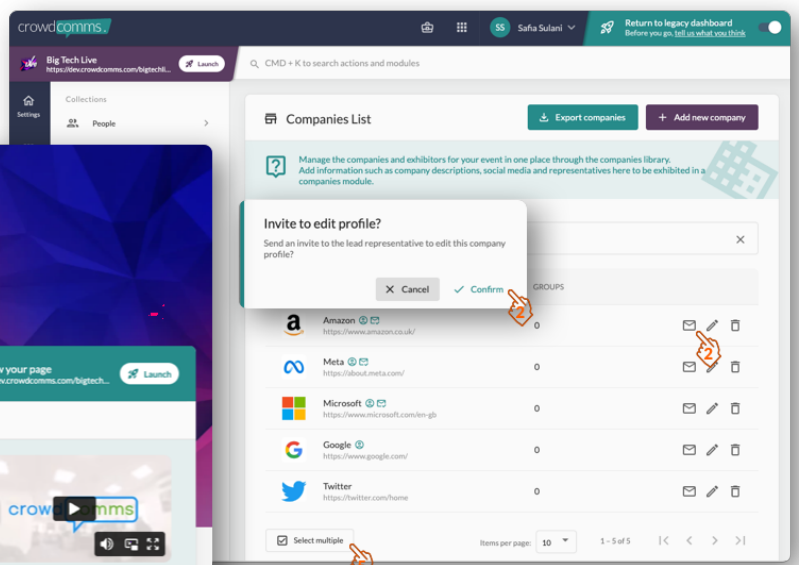
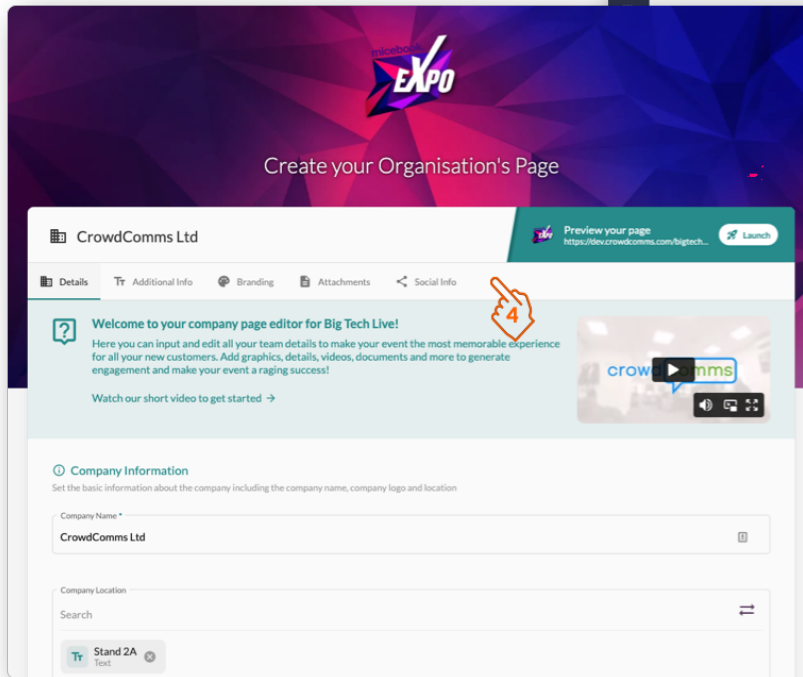
## Setting Up a New Company

1. First, let's add a company to the Dashboard.
2. Click on the 'Add New Company' button, add the name of your company and click Submit. The new company will appear on your list.
3. Click on the pencil icon to edit the company's page.
4. Before sending out the link to the Exhibitor Portal, as a bare minimum you will need to assign someone to the company's Main Representative field. They will need their email added to the dashboard.
5. Go to the Representatives & Groups tab. Click on the Main Representatives dropdown and you will see a list of users you can add to this field.
6. Please note that you can only add one user to the Main Representative field.
7. If the representative of the company hasn't been added to your Dashboard, please click [here](#) to learn how to add them.
8. Click 'Save Changes' to save your page.



## Exhibitor Portal Company Access

1. Once you have added your company and linked the main representative you can send out the Exhibitor Portal link.
2. To do this, on the Companies List page, click on the envelope icon. A confirmation dialogue will appear, click Confirm.
3. The company's main representative will receive an email with the link to the Exhibitor Portal.
4. The content of the Exhibitor Portal will be identical to the company page you see when editing on your dashboard, except for the Representatives & Groups tab. The Exhibitor Portal will not show this tab.
5. You can also send the link to multiple companies at once. Click on 'Select multiple' and tick the companies you wish to email. Alternatively, select all the companies on the page by clicking on the first check box.
6. Click on 'Invite selected to edit profile' to complete.



# Videos

# Locations

Learn how to create and view locations which can then be linked to agenda sessions or company booths. These can be simple "text" labels, "pindrops" linking to a specific place on a floor plan or "map" locations which link to a google maps page.

Pin drop locations must be created within a "Maps" module and cannot be created in bulk via spreadsheet upload like text based locations. When linking to an agenda session, make sure you look out for the subtitles which denote which of the above type of locations they are, so that you select the right one.



# Live Streams

For virtual events this is where you will create and setup your livestreams, with options to add a Poster image and toggle captions.

At the bottom of this page you will find the stream key and server URL which will be required to point your stream at this location. You will also find the button to "Complete Stream" once it has concluded, which will make the recording automatically available for re-watch.

After creating your live stream you will need to link it a front end module for viewing. We DO NOT recommend using the "Live Streams" module for this in most cases, as it will not permit it to be shown alongside any other info or engagement features such as polling, Q&A etc. Instead linking to an agenda session is the best practice which can then be populated with any additional information you require.

# Zoom Meetings & Webinars

Here you can import and manage any events that you have linked from your Zoom account integration. Please see our full [Zoom Integration Setup Guide](#) for details on how to set up the integration with your Zoom account.

This feature will need to be enabled by a CrowdComms member of staff prior to being accessible. Reach out to your account manager or on Live Chat if you need this enabling as a part of your package.

# Documents

# Images

# Live Polls

Live polling is best set up in advance of your event, as there are a variety of ways you can approach running them and they will require a CMS user to cue the appropriate question at the right time.

This section includes three training videos:

1. Introduction to the live poll module
2. Different setup options for showing polls in the agenda, direct linked, and multi-track polling + Customising the live poll display
3. Managing live polls at your live event





# Surveys

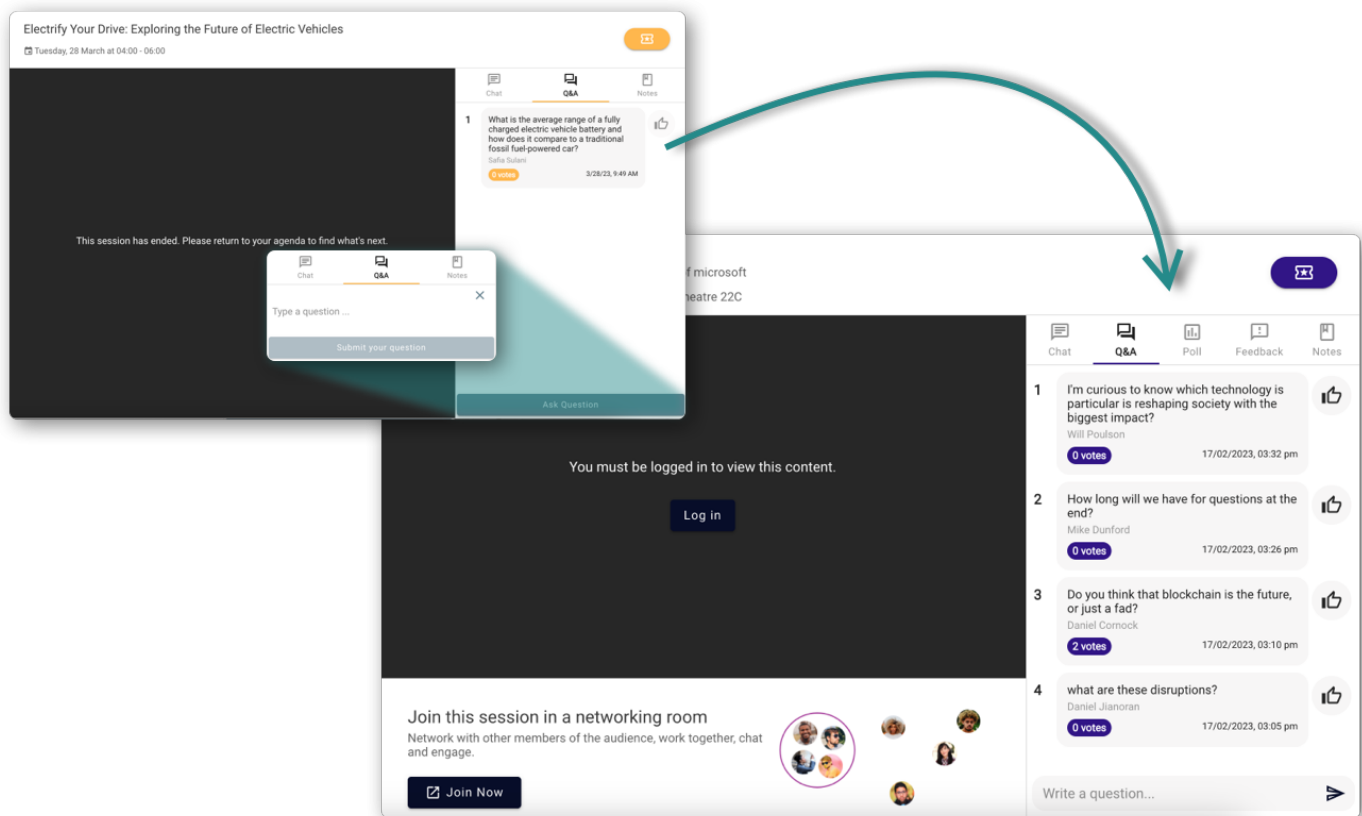


# Q&A

This section includes three training videos:

1. Q&A setup options
2. Customising Q&A display
3. Managing Q&A at your live event

The Q&A response field is a valuable addition to the platform, providing users with a new level of longer-term interactivity and engagement. With this feature, users can ask specific questions related to the content and receive targeted responses that address their enquiries. We also simplified the 'Ask a Question' process down to one click!



Depending on how you wish to run your Q&A there are a variety of settings to enable you to tailor the function to your specific event. In the video below, we will take a look at how to approach this as well as exporting, moderation settings and more.

## Q&A Setup Options

Q&A Customisation

Q&A Managing At Your Event



# Smart Sessions

This feature will need to be enabled by a CrowdComms member of staff prior to being accessible. Reach out to your account manager or on Live Chat if you need this enabling as a part of your package.