

Eventsforce Integration Setup Guide

Before you can connect your event to CrowdComms, you will need to generate an API user within your Eventsforce account, and generate an API key. Instructions on how to do this can be found [here](#):

If you find you have any trouble with the setup, then you will need to get assistance from Eventsforce direct before we can start the setup with our platform. To do this, you can start a chat with an Eventsforce support agent from within your admin area.

From our side, please note that our system only allows group names up to 50 characters long. So you will need to bear this in mind with your fields that you wish to pull through into cc groups

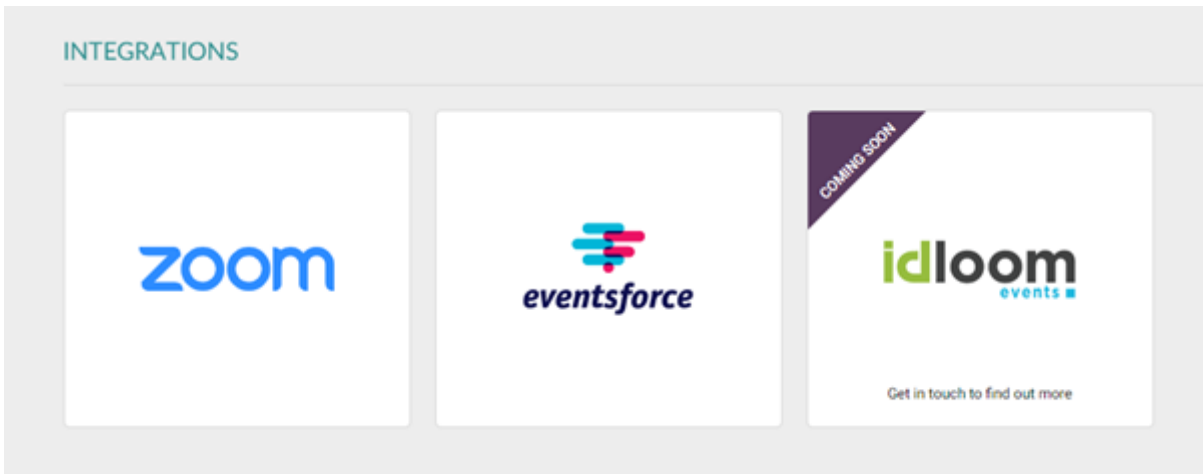
Please note: You need to make sure that within Eventsforce all your custom fields are set up to apply to '**this event only**'. If you set them up as 'available to all events' then they will count as event-spanning, aka profile level questions. They are then carried within your Eventsforce profile as Custom Data. This will NOT pull through via the API, which only pulls through your event specific registration data, so please make sure your questions and answers are correctly configured before setting up your API.

We don't filter the registration or payment status when requesting the attendees from Eventsforce. However, the Eventsforce API states that if no registration status is specified, by default it will only return complete registrations. Therefore, we will only get complete registrations pull through to the CrowdComms cms. If you need further information on this, please refer to their documentation [here](#).

Connecting EF to CrowdComms

1. Log into the CrowdComms dashboard with your Credentials
2. Click to edit the app that requires integration

3. Click on “Plugins” at the very bottom of the left hand menu



4. Click on the “eventsforce” Tile

A screenshot of the 'Eventsforce' integration setup page. At the top, there is a back arrow and the title 'Eventsforce'. Below this are two tabs: 'ACCOUNT DETAILS' (which is selected and underlined) and 'CUSTOM FIELDS'. Under the 'ACCOUNT DETAILS' tab, there is a section titled 'Eventsforce Integration' with the subtext 'Integrate your Eventsforce account with the CrowdComms platform'. Below this section are three input fields with labels: 'Client Account', 'Event ID', and 'API Key'. At the bottom right of the page, there is a purple 'Save' button.

5. Enter the following.

- **Client I.D**
- **Event I.D**
- **API Key**

6. Click “Save”

Automatic Field Mapping

The above steps may be all you need to do depending on the fields set up on your reg form. The

following information will pull across as standard:

Attendee Information:

- First Name
- Last Name
- Email
- Title
- Job Title
- Company

Sessions set up in eventsforce will pull into a new agenda module in CrowdComms, so you won't need to create one. The session details which pull across are:

- Title
- Start Date/Time
- End Date/Time
- Description
- Session presenters

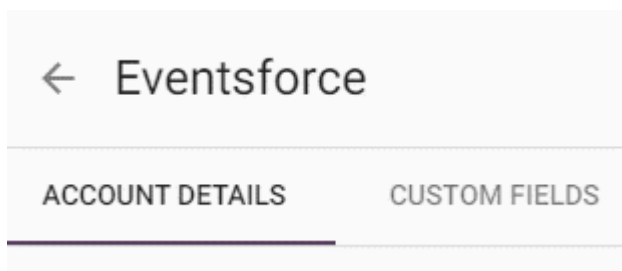
Please note: session presenters are added to a 'Presenter' session group

Abstracts are also added to the sessions as documents

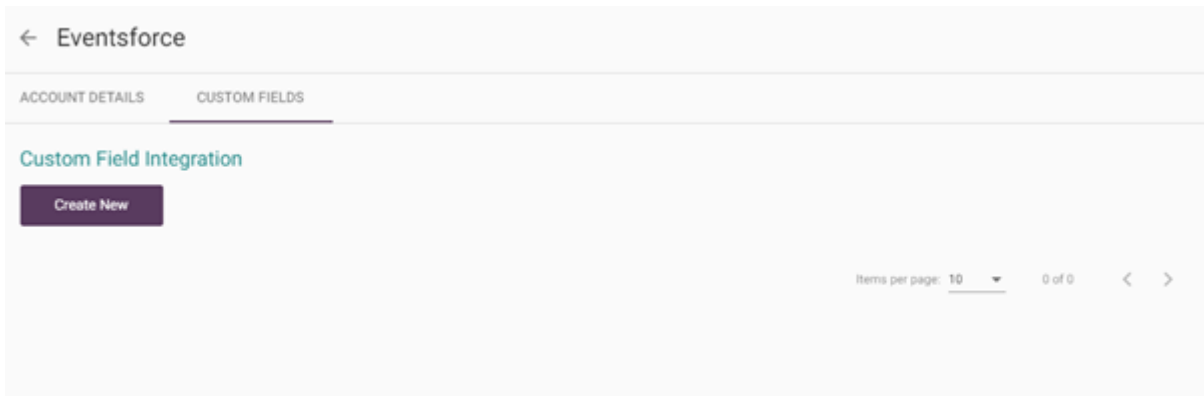
Custom Field Mapping

Now that the EF connection details have been inputted & saved, you can now click on the "Custom Fields" TAB to input any custom fields required.

1. Click on the "Custom Field" TAB



2. Click on “Create New”



3. Enter the Name of the EF Field required to be pulled through

A screenshot of the Eventsforce web interface, showing the 'Custom Field Integration' form. The header and navigation bar are the same as in the previous screenshot. The form has a teal border and a title 'Custom Field Integration'. Inside the form, there's a label 'EF Field' and a text input field containing the text 'Campaign Member Yes No'.

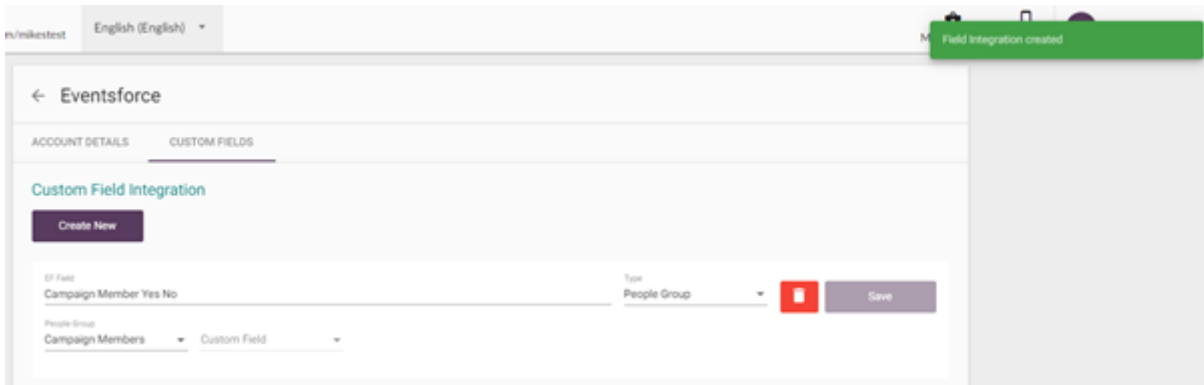
4. Select the type (Custom Field or People Group)

A screenshot of a dropdown menu. The label 'Type' is above the dropdown. The dropdown is open, showing 'People Group' as the selected option. There's a small downward arrow icon to the right of the text.

5. Select the exact group/field to be mapped. Which drop down is available as to select here will depend on which 'type' you selected in step 4.

A screenshot of two dropdown menus. The first dropdown is labeled 'People Group' and has 'Campaign Members' selected. The second dropdown is labeled 'Custom Field' and is currently empty. Both dropdowns have a small downward arrow icon to their right.

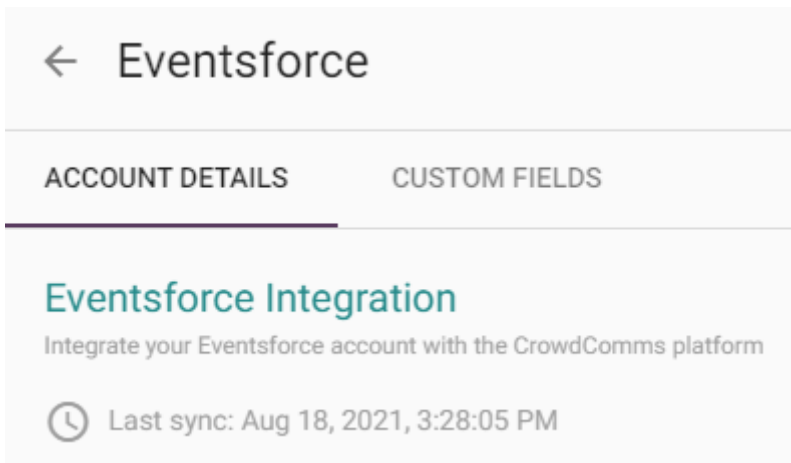
6. Click “Create” (You will now receive a message to say if the field mapping has been saved or not)



7. Repeat the process as necessary

Notes

- Syncing between EF and CrowdComms takes place once per hour, on the half hour (30 mins past the hour)
- You can view when the last Sync was by going into the EF tile in Plugins



Revision #1

Created 2 June 2024 10:41:09 by Lee Jack

Updated 3 June 2024 08:05:23 by Lee Jack