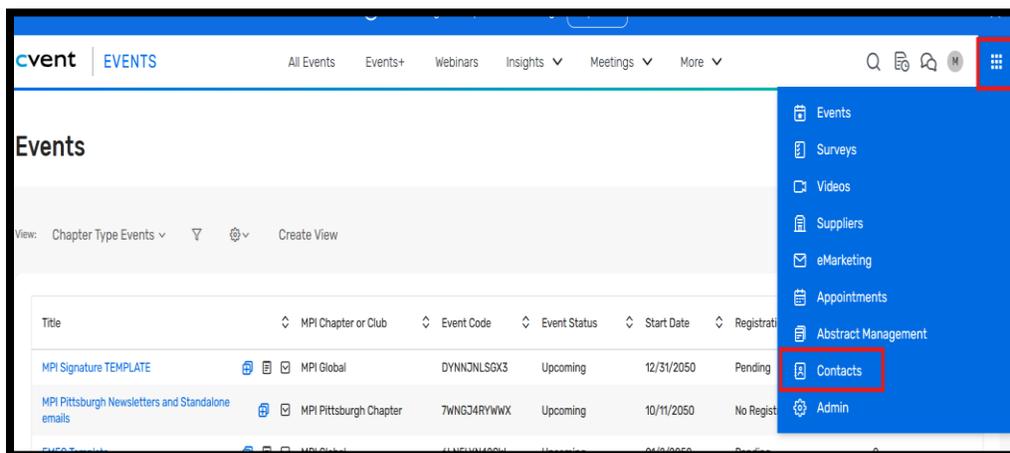# MPI CHAPTER PROCESSES & BEST PRACTICES

CONTACT GROUP CREATION - WITH VISIBILITY STEPS AND NAMING CONVENTION

When creating contact groups, it's important to follow the MPI naming convention for easier identification. The naming convention is: **MPI [Chapter Name] [List Name]**

Creating Contact Group

- In the top nav, click on Appswitcher in top-right > go to Contacts.
- Click the Contact Groups tab.
- Click Create Contact Group (blue button, top-right).
- Choose Type = Standard List
- Name the group as per the naming convention
- Under '**Contact Group Visibility**' select the users that are associated with your Chapter list and click on Save.

Cvent | CONTACTS

Contacts > Address Book

Address Book

Create Contact Group | Export

Contacts | Contact Groups

All Contact Groups ⌄

	Name	Short Description	Type	Number of Contacts
	MPI GNY Chapter All Contacts	☑	Standard	0

Address Book
Reports

Contacts > Address Book > Contact Groups > Contact Group

Contact Group

Save | Cancel | Save & New | Spelling ⌄

Contact Group Information

* Name:

MPI [Chapter Name] [List Name]

Type:
- ● Standard
- ○ Distribution List
- ○ Exclusion List

Short Description: ⓘ

Contact Group

Save | Cancel | Save & New | Spelling ⌄

300 characters left

Contact Group Visibility

The following users can access this contact group.

	Users
☐	
☐	.Philadelphia Chapter, Staff
☐	Acosta, Melissa
☐	Ad, Sponsored
☐	Admin, Admin

<u>Importing Contacts to the Contact Group:</u>

Prepare your Excel file with the details of the contacts and ensure that the required fields such as: Email, First Name, Last Name columns are present.

- In the top nav, click on Appswitcher in top-right > go to Contacts
- Click **Import**.
- Select 'Import Source:' as 'Data file' > Click on Next.

Under Step 1: **Select the Import Method and Matching Setting**

- For 'Import Method:' select '**Insert new contacts and update existing contacts'**
- For 'Match contacts by:' Select 'Email Address' > Click on Next

Under '**Step 2: Select the Import File**'

- Upload the prepared file by clicking the 'Browse' button

Under '**Step 3: Map Fields in the Import File to Fields in Cvent**'

- Map the fields in your prepared file to the Cvent fields.

Under '**Step 4: Associate the Imported Contacts**'

- We will select the Contact group to which the Contacts would be added.
- Click on the **'Add Contact Group'** button
- If adding the records to an existing contact group select **'Add to an existing group'** and type the keyword or the name of the group and click on search button in the bottom right of the pop-up window.
- Select the contact group from the list by click in the 'Select' option.
- If adding the records to a new contact group which is not present in the account, select **'Add to a new group'** and type the name in the name field as per the naming convention for Contact group (**MPI [Chapter Name] [List Name]**) and click on **Save** to create the group **(Once the import process is completed please follow the above-mentioned steps to update the Contact Group Visibility)**.
- Once you have selected the contact group or created a new one, click on **Next** button by scrolling towards bottom of the page.
- Once you have reviewed the selected settings and options, Click **Finish** to start the import and add the contacts to the selected group.

  <u>Note: It is very important to maintain contact group visibility so that each chapter's contacts/members are visible to its own chapter administrators only.</u>

Import Contacts

Need help importing contacts?

Step 1: Select the Import Method and Matching Setting

Import Method:

- ● Insert new contacts and update existing contacts
- ○ Insert new contacts, skip existing contacts
- ○ Update existing contacts, skip new contacts
- ○ Associate existing contacts to a group or list, skip new contacts

Match contacts by: ⑦

- ● Email Address
- ○ Source ID

Cancel Next →

Import Contacts

Need help importing contacts?

Step 2: Select the Import File

Required File Format: Tab-Delimited (.txt) or Microsoft Excel (.xls or .xlsx)

The first row of the file should contain the column names. All other rows should contain values for a specific Contact. If you are updating existing contacts, blank values in the import file will overwrite the corresponding values in your address book.

Required Fields: Email Address

Download a file containing the default column names that will be mapped to Cvent fields.

File:

No file selected...   Browse...

Notify me by email when the import is complete:

- ○ Yes
- ● No

← Previous   Cancel   Next →

Import Contacts

Need help importing contacts?

Step 3: Map Fields in the Import File to Fields in Cvent

To exclude a field from the import, select **Do Not Import** for the corresponding Cvent field below.

Your Fields	Cvent Fields
Full Name	**Do Not Import**
Email Address	Email Address
Company	Company
Title	Title
Source ID	**Do Not Import**
Created Date (GMT-06:00) Central [US & Canada]	**Do Not Import**

Import Contacts

Need help importing contacts?

Step 4: Associate the Imported Contacts

Below you can associate your imported contacts to contact groups or invitation lists.

Contact Groups

The contacts will be added to the following contact groups.

Delete	Name	Type	Number of Contacts	Action
		None added.		

Add Contact Group

If Adding contacts to an existing contact group

Add Contact Groups   ✕

Contact Group:

○ Add to a new group

● Add to an existing group

○ Replace members of an existing group

Name:

MPI

Search

Delete   Name   Type   Number of Contacts   Action

Name:

MPI

	Name	Type	Members
Select	MPI GNY Chapter All Contacts	Standard	0
Select	2025 – MPI MI Chapter Contact List – 6.30.2025	Standard	907
	2025 MPI Carolinas - Charlotte		

Search

If creating a new contact group

Add Contact Groups   ✕

Contact Group:

● Add to a new group

○ Add to an existing group

○ Replace members of an existing group

* Name:

MPI [Chapter Name] [List Name]

* Type:

Standard   ⌄

Save

You may also refer to page 19 of the MPI User Guide for steps on how to add your chapter contacts to the MPI Global Cvent account and manage the visibility of those records.

Please note: If you need assistance in creating contact groups or importing your chapter contacts, please contact the system admins at aniket.gupta@cvent.com and mshoaibmauloodi@cvent.com. If you have any other questions, please feel free to reach out to us.