SIGNIVENT

Invitation lists

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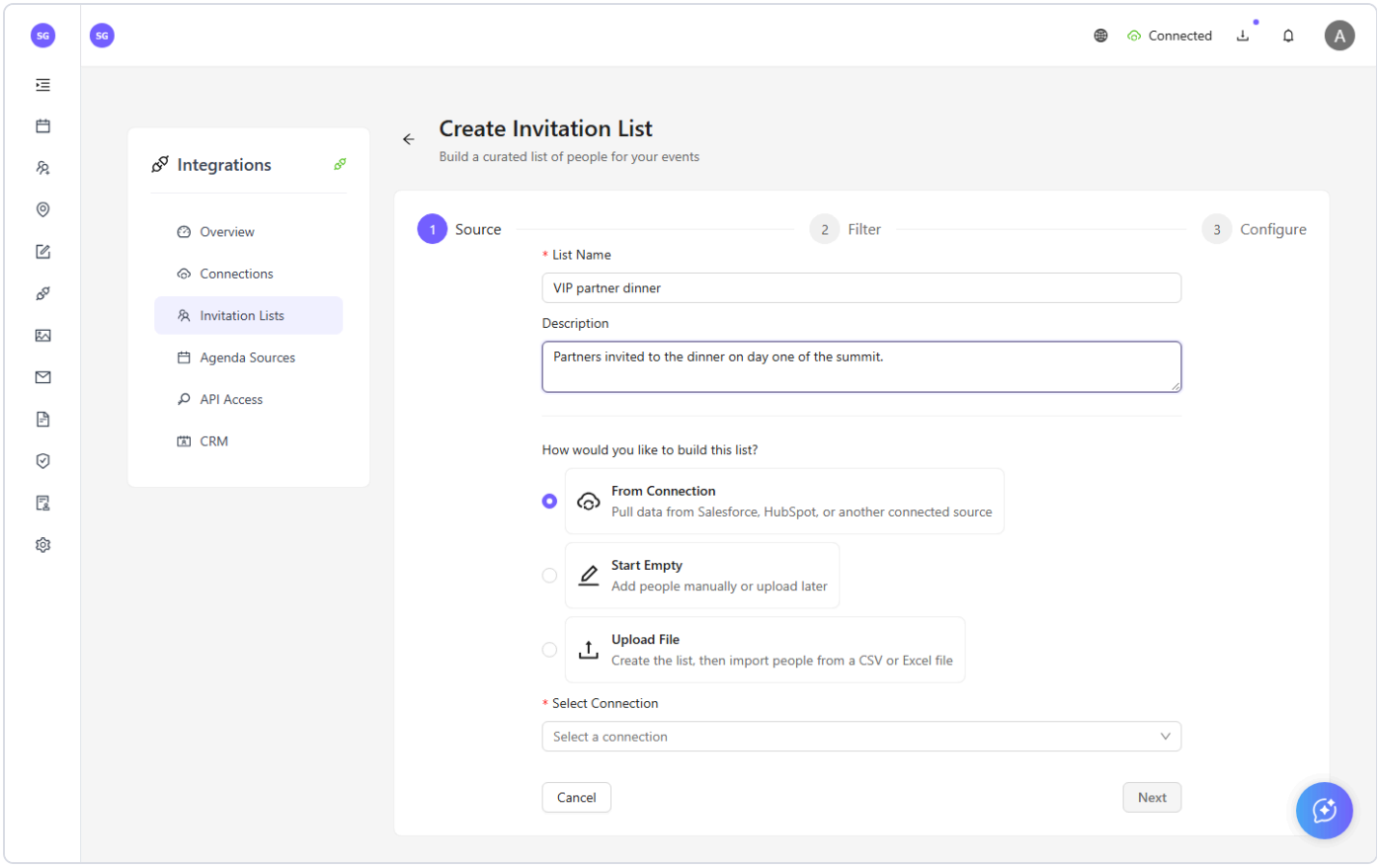
An invitation list is a curated set of people your organization wants to invite, such as VIP clients or this year's prospects. Lists are built once under **Integrations** > **Invitation Lists** and shared by all your events. Inside an event you link a list, and syncing it adds the people to that event as invitees.

Create a list

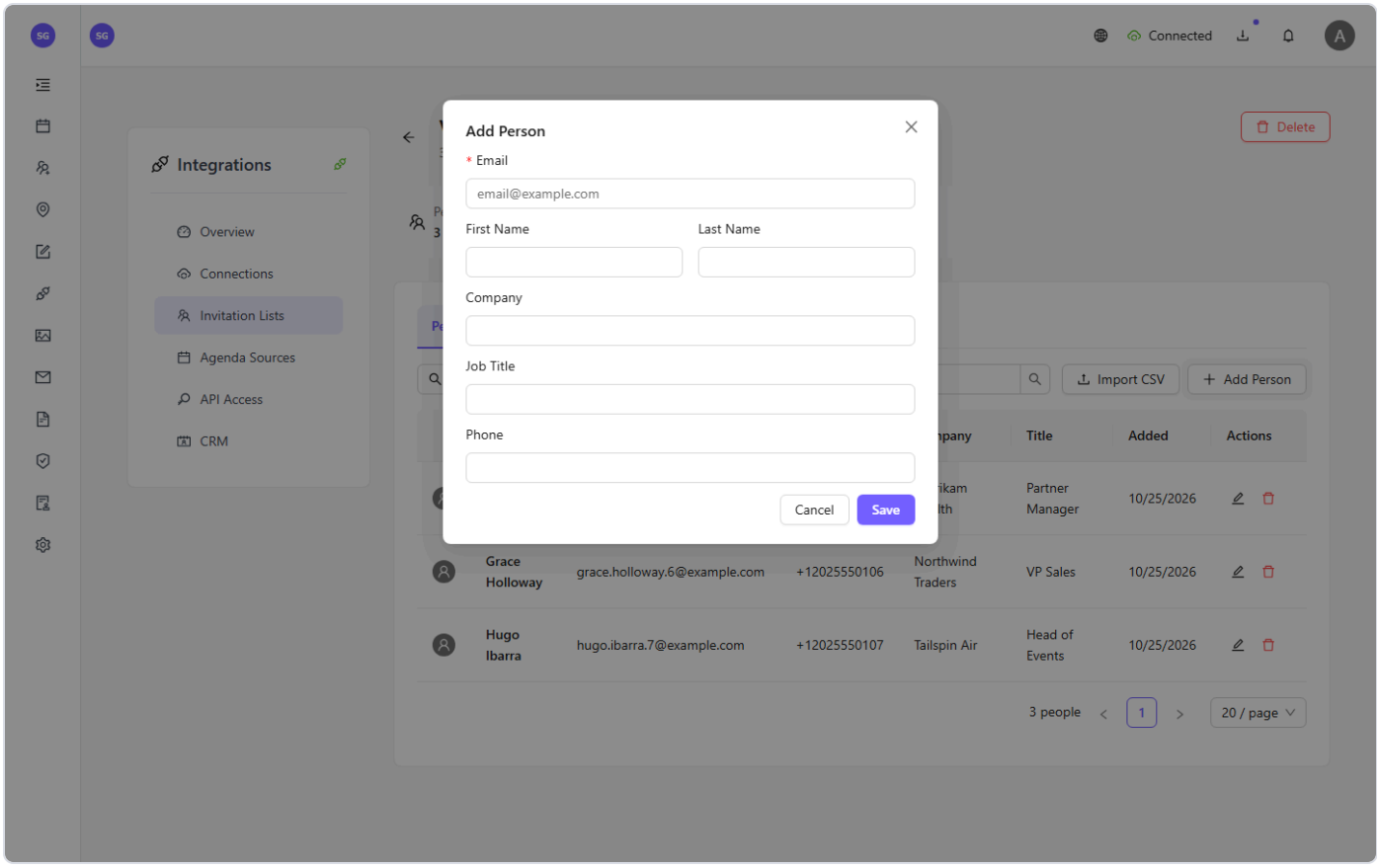
1. Go to **Integrations** > **Invitation Lists** and click **Create List**.
2. Enter a **List Name** and an optional **Description**.
3. Choose how to build it:
   - **From Connection** pulls people from Salesforce, HubSpot or another source you connected under Integrations.
   - **Start Empty** creates the list so you can add people one by one.
   - **Upload File** creates the list so you can import people from a CSV or Excel file.
4. Click **Create & Import**. The new list opens, ready for people. With **Upload File**, the **Import CSV** dialog opens on it straight away.



Create Invitation List: name, description and the three ways to build the list

Add people one at a time

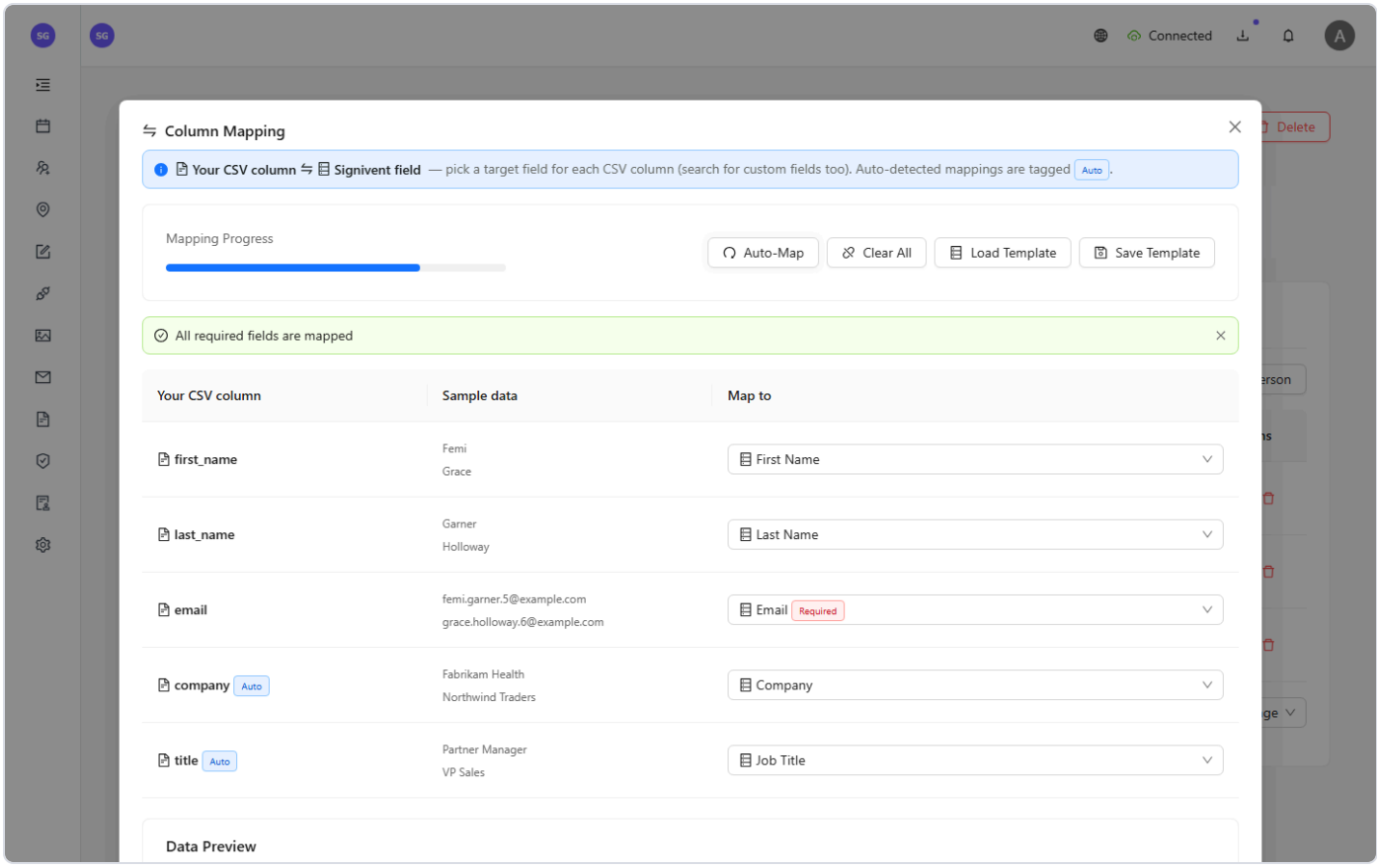
1. On the list, click **Add Person**.
2. Fill in **Email** and, if you have them, **First Name**, **Last Name**, **Company**, **Job Title** and **Phone**.
3. Click **Save**.



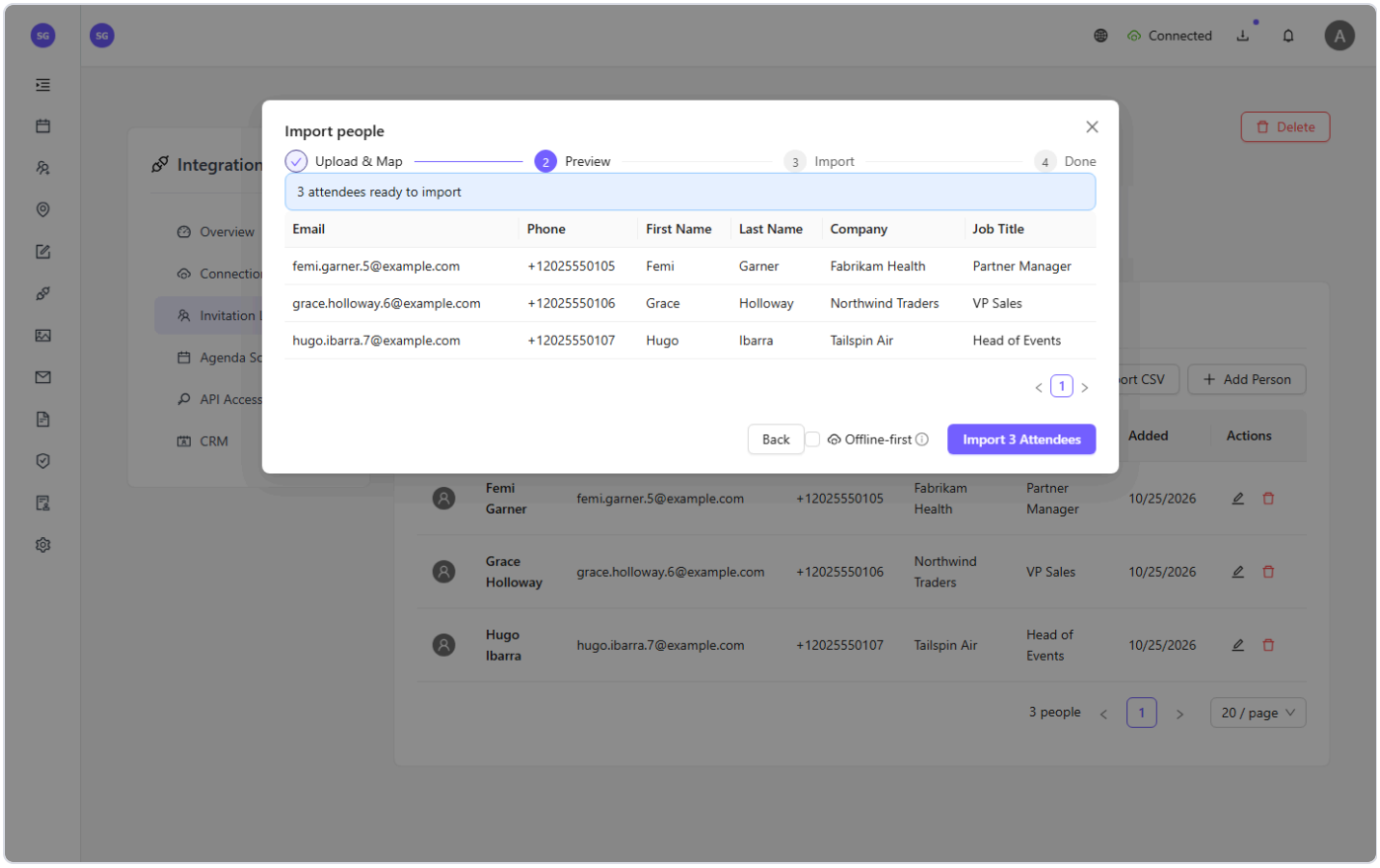
The Add Person form

Import people from a file

1. On the list, click **Import CSV**. Use **Download CSV Template** or **Download Excel Template** if you want a file with the right columns.
2. Drop your CSV, XLSX or XLS file on the upload area.
3. **Map the columns.** Each column of your file is matched to a field; matches found automatically are tagged **Auto**. Email is required. Change any match with the drop-down, or pick **Don't import this column**. **Save Template** keeps a mapping you will use again.
4. Click **Complete Mapping** and check the **Preview**.
5. Click **Import**. A panel in the corner shows the progress and how many rows were added or skipped.

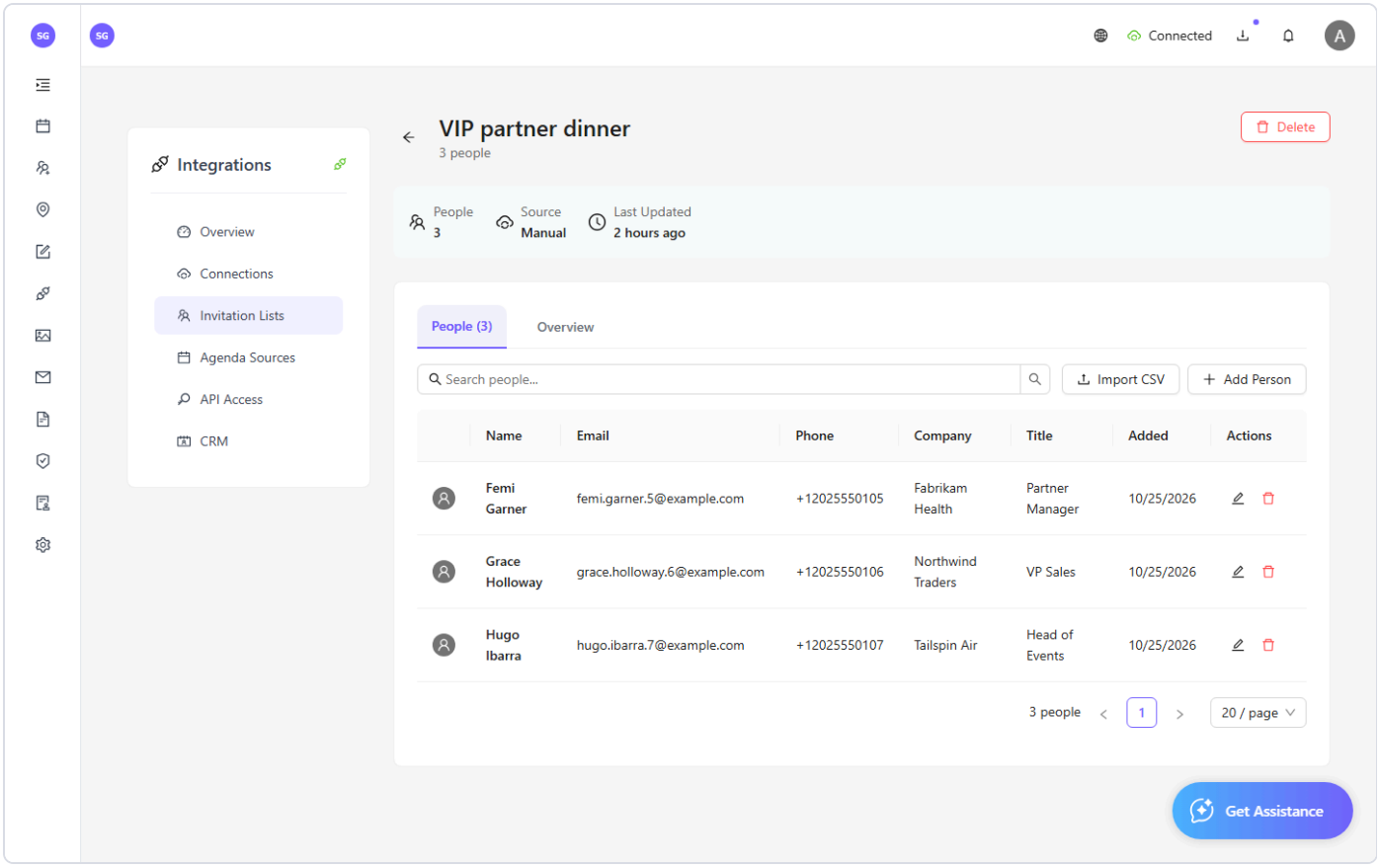


Column Mapping: each CSV column matched to First Name, Last Name, Email, Company and Job Title



The import preview: three people ready to import

People already on the list are skipped, so importing the same file twice does not create duplicates. **Download skipped rows (CSV)** in the progress panel lists what was skipped and why.

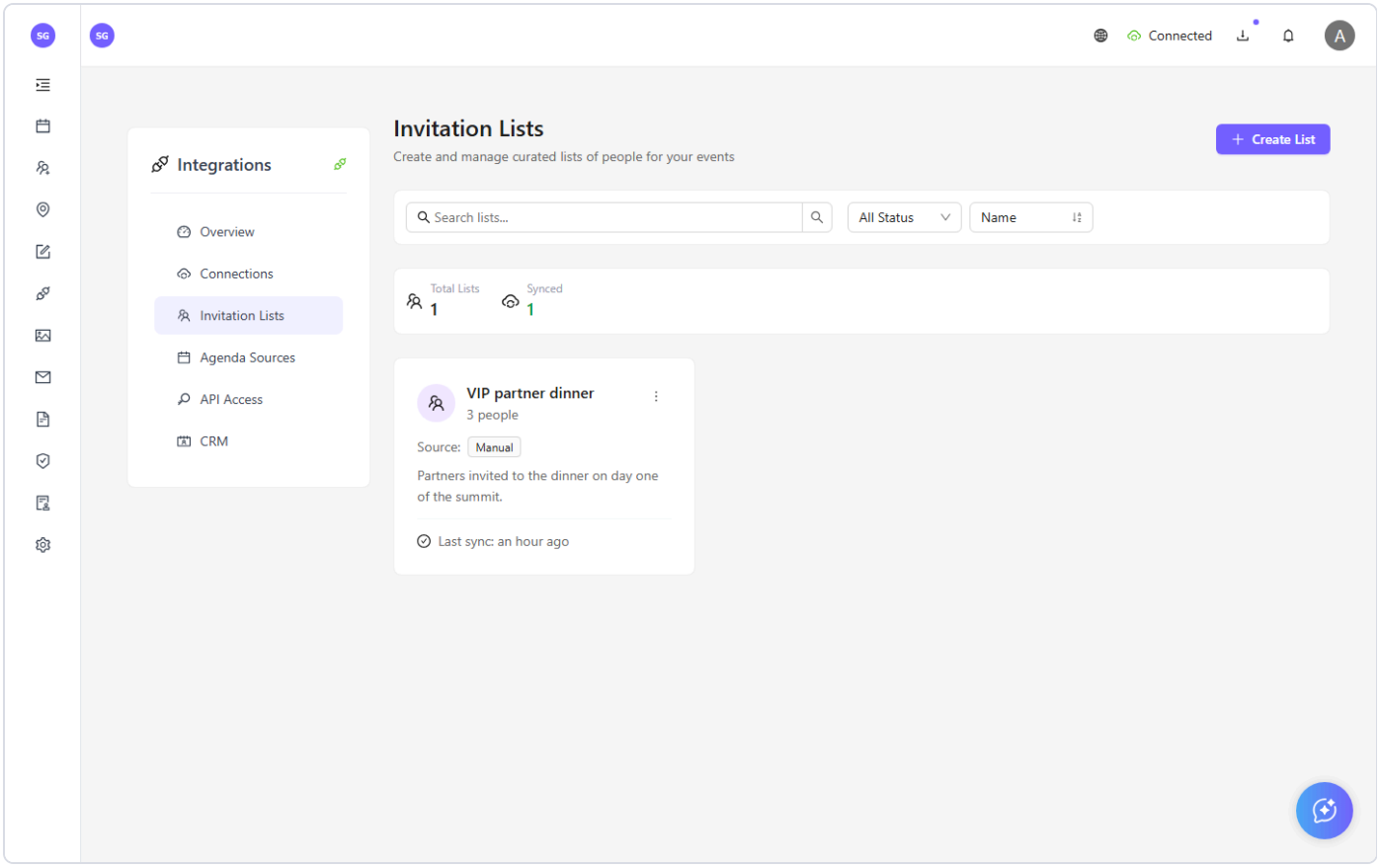


A list with three people: name, email, phone, company, title and the date added

Use the pencil on a row to edit a person, or the bin to remove them. **Delete** at the top removes the whole list.

Find your lists

The Invitation Lists page shows every list with its number of people, its source (Manual, or the connection it came from), its description and when it last synced. Search by name, filter by status and sort by name.

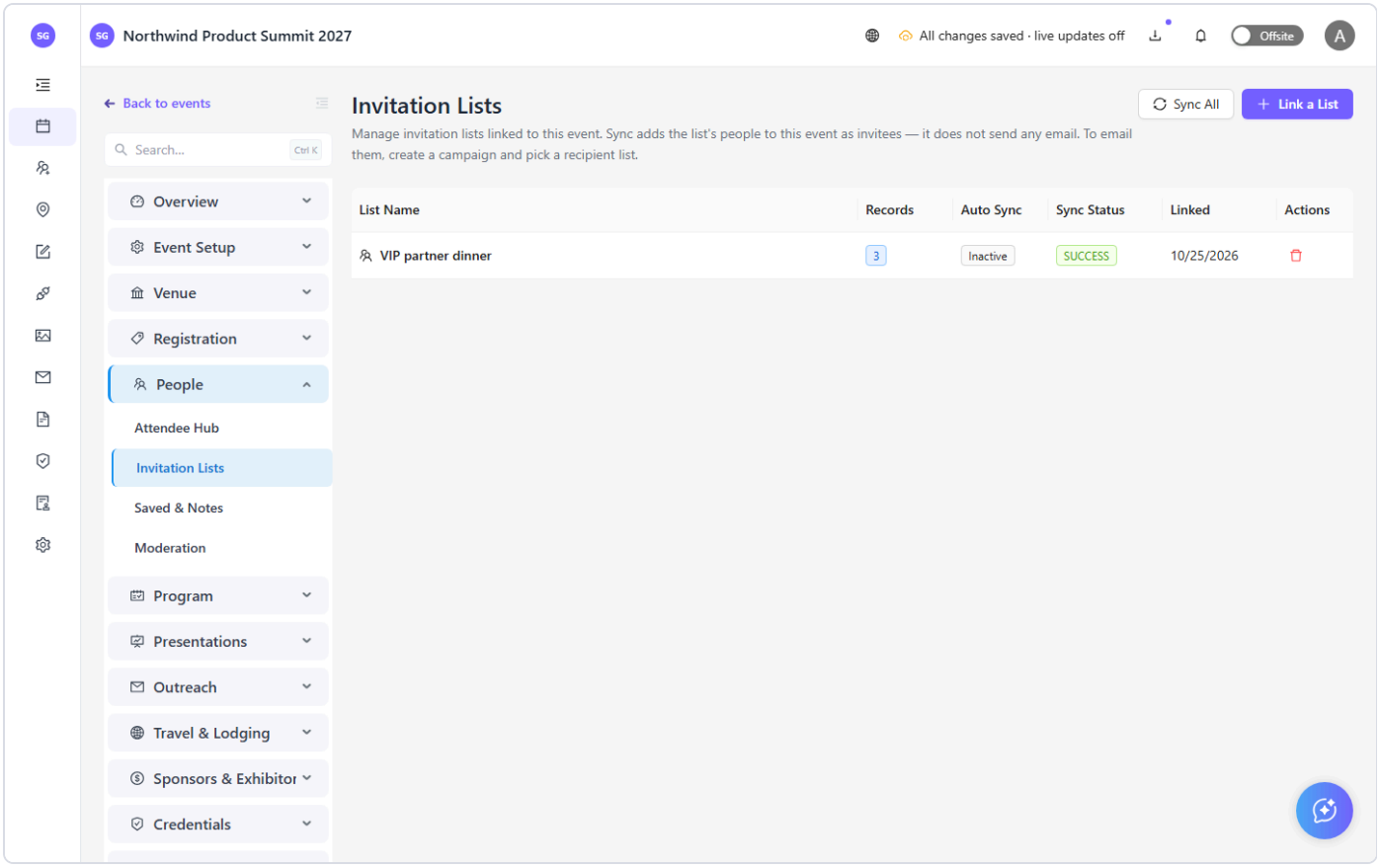


Invitation Lists: one list with three people, source Manual, never synced

Use a list in an event

1. Open the event and go to **People** > **Invitation Lists**.
2. Click **Link a List**. Your organization's lists appear with their number of records; click **Link** next to the one you want. You can switch on **Auto Sync** there too.
3. Click **Sync All**. The people on the list are added to the event as invitees, and the **Sync Status** changes to SUCCESS.

Syncing does not send any email. To email the people on a list, create an email campaign and pick a recipient list; a recipient list can be built straight from an invitation list.



An event's Invitation Lists page: VIP partner dinner linked, three records, sync status SUCCESS, with Sync All and Link a List

Who can do this

Organization admins can create, import into and delete lists. Event teams link lists to their events.

Troubleshooting

You see	Why	Fix
"1 required field is not yet mapped: Email" and every column shows Don't import this column	The automatic matching did not run	Click **Auto-Map**, or pick Email for your email column by hand
Rows were skipped	They are already on the list, or have no email	Download the skipped rows from the progress panel to see the reason
From Connection has nothing to choose	No CRM or data source is connected yet	Add one under Integrations > Connections or CRM
A list made with Upload File shows Source: Manual	Files count as a manual source	Nothing to fix
People do not appear in the event	The list is linked but not synced	Click **Sync All** on the event's Invitation Lists page