

UCSF Continuing Education Portal



Live Activity Setup VII – Part 1: Exhibits and Promotional Opportunities

This guide will cover the following topics for setting up the Exhibitor Portal and managing promotional opportunities in CloudCME. This is a comprehensive manual. For a quick reference, see the Managing Exhibits and Promotional Opportunities Job Aid.

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Standard 5 of the Standards for Integrity and Independence in Accredited Continuing Education

The Standards for Integrity and Independence in Accredited Continuing Education are designed to:

- Ensure that accredited continuing education serves the needs of patients and the public
- Present learners with only accurate, balanced, scientifically justified recommendations
- Assure learners they can trust accredited continuing education to help them deliver, safe, effective, cost-effective, and compassionate care that is based on best practice and evidence
- Create a clear, unbridgeable separation between accredited continuing education and marketing and sales.

Standard 5 applies only when there is marketing by ineligible companies or nonaccredited education associated with the accredited continuing education.

Accredited providers are responsible for ensuring that education is separate from marketing by ineligible companies—including advertising, sales, exhibits, and promotion—and from nonaccredited education offered in conjunction with accredited continuing education.

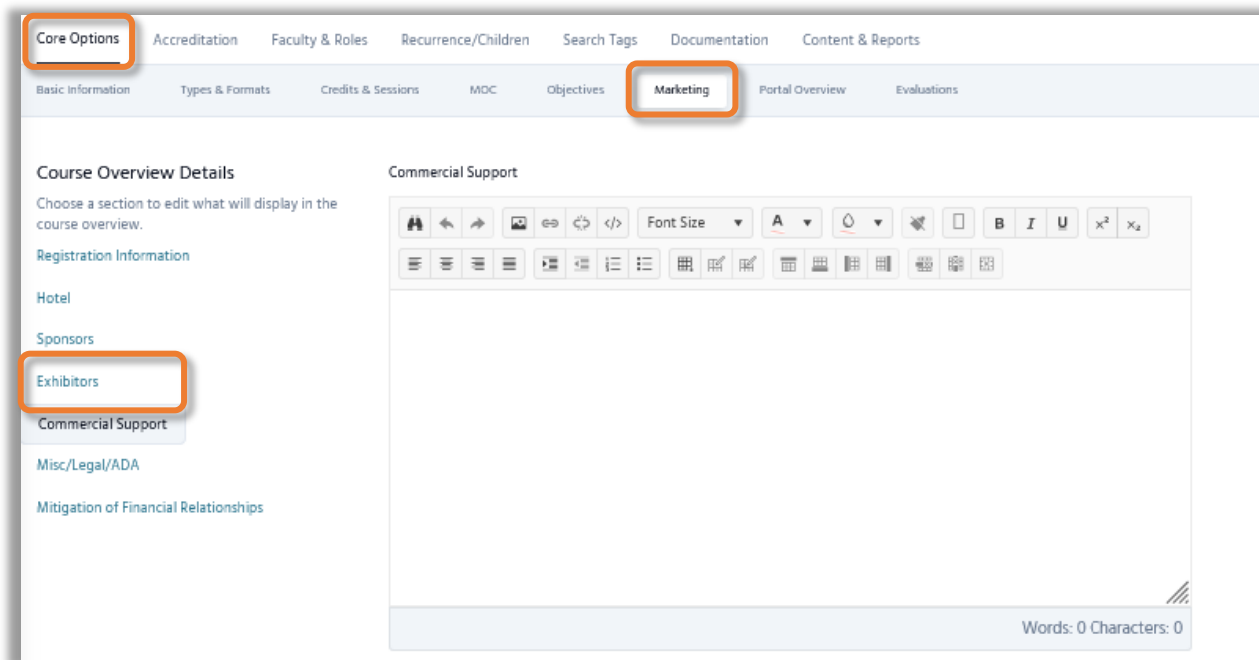
1. Arrangements to allow ineligible companies to market or exhibit in association with accredited education must not:
 - a. Influence any decisions related to the planning, delivery, and evaluation of the education.
 - b. Interfere with the presentation of the education.
 - c. Be a condition of the provision of financial or in-kind support from ineligible companies for the education.
2. The accredited provider must ensure that learners can easily distinguish between accredited education and other activities.
 - a. Live continuing education activities: Marketing, exhibits, and nonaccredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled and communicated as such.
 - b. Print, online, or digital continuing education activities: Learners must not be presented with marketing while engaged in the accredited education activity. Learners must be able to engage with the accredited education without having to click through, watch, listen to, or be presented with product promotion or product-specific advertisement.
 - c. Educational materials that are part of accredited education (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) must not contain any marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages.
 - d. Information distributed about accredited education that does not include educational content, such as schedules and logistical information, may include marketing by or for an ineligible company.
3. Ineligible companies may not provide access to, or distribute, accredited education to learners.

For more information: <https://accme.org/rule/manage-ancillary-activities-offered-in-conjunction-with-accredited-continuing-education/>

Step 1. Publishing your Request for Exhibitors

You can add an Exhibitors tab to your Course Details page by adding informational language in the **Activity Editor**.

1. After opening the Activity Editor for your activity, navigate to **Core Options > Marketing**, and click the **Exhibitors** link on the left-hand side under **Course Overview Details**.
2. Start with adding the template language from the **Marketing Templates** site at <https://ucsf.cloud-cme.com/course/courseoverview?P=5&EID=15251>
3. Copy the text in the **EXHBITORS** tab on the Marketing Templates site to your clipboard.
4. In the Exhibitors text box, click the HTML code button **</>** and paste the code in the dialog box. Click **Update**.



5. Update the inserted text with details or other information pertinent to your activity, especially the last paragraph concerning contact information. Cancellation dates and fees (if any) are worth noting as well as special benefits for exhibitors.

Course Overview Details

Choose a section to edit what will display in the course overview.

Registration Information

Hotel

Sponsors

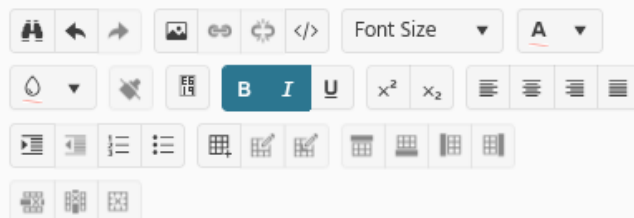
Exhibitors

Commercial Support

Misc/Legal/ADA

Mitigation of Financial Relationships

Exhibitors



case no refund of exhibit fees will be allowed.

Payment Deadline & Late Fee Policy

Exhibitor payment is due in full by the deadline listed on program materials (webpage and exhibitor agreement form). A **\$500 late fee** will apply to any payments received after the posted deadline.

To avoid a late fee and ensure participation, **proof of payment** (such as a check copy, electronic payment confirmation, or remittance advice) must be submitted by the deadline.

Please note that exhibit placement and promotional benefits are not guaranteed until full payment and proof of payment are received.

Cancellation Policy

There are no refunds for cancellations of exhibit registrations.

Payment must be received prior to the event.

[Download a copy of UCSF's payment information: UCSF W9](#)

For information about commercial support opportunities,

Words: 298 Characters: 2037

6. Click

Save Changes

Step 2. Share a Tracking Tool with the Office of CME

To assist you in tracking solicitations and payments and helping the OCME identify payments that belong to your activity, we recommend sharing a tracking sheet listing vendors who have been or will be solicited.

Use this tool to keep track of contacts, pledges, payments and amounts. A template is available from the CE Portal: [Commercial Support and Exhibit Tracking \(xls\)](#).

Upload the document to a shared cloud site such as OneDrive or Teams (SharePoint), or UCSF Box, and share with Kristy.Hanstad@ucsf.edu and Christopher.Conway@ucsf.edu for real-time updates.

Note that exhibitor registrations are automatically added to the [Budget Tool](#) when orders are placed in the system. Unlike Commercial Support, you will only need to add items to the Budget if they are processed outside the system. See Part 2 of Guide 7 for more information about how this works for commercial support.

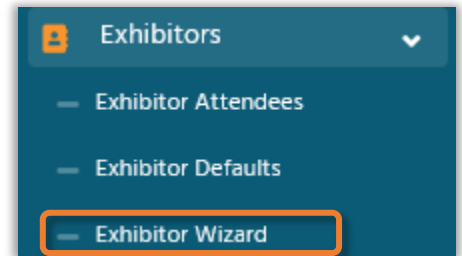
Step 3. Create your Promotional Packages and Open Exhibitor Registration

The CE Portal has a separate area for exhibitors to purchase table space, promotional items, or packages and indicate booth attendees. This is set up through CloudCME's **Exhibitor Wizard**.

To begin, navigate to [Exhibitors > Exhibitor Wizard](#).

Search for your activity in the search box by name, keyword, OCME course number, or CloudCME activity ID.

The [Exhibitors Screen](#) will display. It has three tabs to complete the creation of your promotional opportunities.

A screenshot of the 'Exhibitor Wizard' form. At the top, there is a search box labeled 'Activity Name...' with a dropdown arrow. To its right are two checkboxes: 'Parents Only' (unchecked) and 'Include Application Submissions' (unchecked). Below this is a tabbed interface with three tabs: 'Exhibit Information' (active, highlighted in dark blue), 'Promotional Products', and 'Packages'. Under the 'Exhibit Information' tab, there are two date pickers labeled 'Start Date:' and 'End Date:'. To the right of these are two checkboxes: 'Exhibitor Registration Form Active' (unchecked) and 'Exhibitor Information Active' (checked). Below the tabs is a section titled 'Contact Information' with three input fields: '*First Name:', '*Last Name:', and '*Organization:'. Each field has a corresponding input box.

A preview of how the information entered in these three tabs appears in the Portal is summarized on the next page. When switched on as active, this information will appear on the **EXHIBITORS** tab on the [Course Details](#) page.

Exhibit Information

Enter the contact information for the person to receive inquiries about promotional opportunities. Name and Organization are the only required fields.

[Overview](#)[Register](#)[Faculty](#)[Schedule](#)[Brochure](#)[Exhibitors](#)

Please click the "Exhibit at this Event" button below to begin.

Contact Us:

Karl Wilkens

CloudCME

1210 Carl Seyfert Memorial Dr

Suite 417

Brentwood, TN 37205

Phone: 6154487910

Email: kwilkens@cloud-cme.com

Website: www.cloud-cme.com

[Promotional Items](#)[Exhibitors Register Here!](#)

Promotional Products

Here you can optionally add promotional items for purchase, such as T-shirts, pens, advertising inserts, swag bags, and such.

Promotional Items

Exhibitor Promotional Option - Attendee Bag Price: \$500.00

Recognition of your company logo or CloudCME's logo (your choice) will be seen daily on bags used by attendees. Opportunity to support the exclusive conference attendee bag is available to exhibitors on a first-come, first-served basis. This fee includes cost of the product. >>

Industry supporter is permitted one promotional insert which requires pre-approval by the Program Manager

Insert to be provided by supporter at own cost and shipped directly to Program Manager

1. Max size 8.5" x 11". Please limit insert to one page.

The bags will be distributed during the on-site registration along with conference materials

Payment is due prior to the conference

Deadline for order commitment is 10/22/2026 11:00:00 PM.

Exhibitor Promotional Option - T-Shirts Price: \$30.00

Conference T-shirts available with your company logo on the front.

Deadline for order commitment is 10/22/2026 11:00:00 PM.

Packages

This is the most important part in that this tab defines what you are offering for purchase from your vendors.

Exhibitor Packages

Exhibitor Package - Gold Price: \$10000.00

Includes:

- (2) 6ft. Tabletop display, chairs, linen and skirting
- Number of Exhibitor Badges: 4
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- Additional Exhibitor Fees (standard electric, power strip) included
- Exhibit Location: Assigned
- Promotional Items:
 - Attendee Bag

Deadline for order commitment is 10/22/2026 11:00:00 PM.

Exhibitor Package - Silver Price: \$5000.00

Includes:

- Recognition as a Silver Level Exhibitor
- (1) 6ft. Tabletop display, chairs, linen and skirting
- Number of Exhibitor Badges: 4
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- Additional Exhibitor fees (standard electric, power strip) waived
- Exhibit Location: Premium
- Promotional Items:
 - T-Shirts
 - Lanyard

Deadline for order commitment is 10/22/2026 11:00:00 PM.

3a. Complete Information in the Exhibit Information Tab

The screenshot shows the 'Exhibit Information' tab selected. It features three tabs: 'Exhibit Information', 'Promotional Products', and 'Packages'. Below the tabs, there are fields for 'Start Date' (9/9/2025 7:0) and 'End Date' (2/14/2026 12), each with a calendar icon. To the right, there are two checkboxes: 'Exhibitor Registration Form Active' and 'Exhibitor Information Active', both of which are checked.

- The [Start](#) and [End](#) Dates for the exhibit are pulled in from the activity dates. These can be adjusted to start later or end earlier, if needed.
- Check [Exhibitor Registration Form Active](#) if you are ready to open exhibitor registration.
- Check [Exhibitor Information Active](#) to display packages and items for purchase on the Course Details page.
- Complete the contact information portion of the form. This is who vendors should contact with questions.

3b. Complete Information in the Promotional Products Tab

The screenshot shows the 'Promotional Products' tab selected. It features three tabs: 'Exhibit Information', 'Promotional Products', and 'Packages'. Below the tabs, there is a blue button labeled 'Add Promotional Item'. Below this button, there is a table with three columns: 'Name', 'Edit Promotion', and 'Edit Product'. The table is currently empty, with the text 'No records to display.' in the first column.

- This tab allows you to add promotional products for purchase either as separate items or as part of a promotional package. You can add as many promotional products as you want.
- Click [Add Promotional Item](#) to add an item to your course. This will open a dialog box.

The screenshot shows the 'Add Promotional Item' dialog box. It has a title bar with standard window controls. The main content area includes a 'Promotion Defaults' section with a dropdown menu labeled '-- Select Default --'. Below this is a 'Promotion Name' text field. There is a checkbox for 'Individual purchase?'. Below that are 'Cost' and 'Limit' text fields. A 'Text' section contains a rich text editor with a toolbar and a large text area. At the bottom, there is a 'Deadline' text field and a 'Save' button. The status bar at the bottom shows 'Words: 0 Characters: 0' and the URL 'ExhibitPromotionalItem.aspx?EventId=20083&ExhibitId=14'.

- Fields in this dialog are:
 - **Promotion Name** – the name of the item for purchase.
 - **Individual purchase?** – if checked, the item will be offered for purchase individually rather than as part of a package.
 - **Cost** – the item’s price
 - **Limit** – the number of items available; set to “0” for unlimited
 - **Text** – a description of the item, including conditions, number of items available, payment terms, deadlines to receive copy or graphics, etc.
 - **Deadline** – the date by which copy or graphics must be received from the vendor to produce the item.
- Select a pre-made promotional item from the **Promotion Defaults** dropdown to pre-populate each of the fields for customization, or create a new one from scratch.

Promotion Defaults: Lanyard

Promotion Name: Lanyard

☐ Individual purchase?

Cost: 600.00

Limit: 55

Text:

Have your corporate logo or CloudCME's logo (your choice) seen on all official lanyards. Opportunity to support the exclusive lanyard with badge holder is available to exhibitors on a first-come, first-served basis. This fee includes cost of the product. Lanyards will be distributed during on-site registration along with conference materials. This opportunity is limited to one supporter. Payment is due prior to conference.

ExhibitPromotionalItem.aspx?EventId=20083&ExhibitID=14

- Click [Save](#) to add the item to your list of opportunities.

Exhibit Information			
Promotional Products			
Packages			
Add Promotional Item			
Name	Edit Promotion	Edit Product	
Promotional Insert	Edit	Edit	Delete

- A **Product** will be generated automatically that ties into the Portal’s e-commerce and registration systems. You will not need to edit anything here as it carries information over from the **Promotion**. (See below).
- Use the [Edit](#) links to edit the **Promotion** or the **Product**. Use [Delete](#) to remove the item.

About the Product Screen for Items and Packages

Select [Edit Product](#) to open the **Products** dialog. The Product information carries over from the setup in the **Exhibitor Wizard** for either Products or Packages.

Vendors will receive a receipt and confirmation email upon the purchase of products or packages; however, if you wish to customize the messaging for the item, you can do so in the [Email](#) tab.

The screenshot shows the 'Email' tab of a product configuration window. The window has tabs for 'Basic Information', 'General Ledger', 'Roles', 'Email', 'Inventory', 'Profession', and 'Review & Save'. The 'Email' tab is active, displaying instructions: 'An email confirmation will be sent to the purchaser if you complete the information below. You can load an existing, previously used confirmation email message to save time. Edit and update that information before saving.'

Fields include:

- Load Existing: [Dropdown]
- Subject: [Text Box]
- From Email: [Dropdown, value: ocmeinfo.som@ucsf.cloud-cme.com]
- From - Full Name: [Text Box, value: UCSF Continuing Education]
- ReplyTo Email: [Dropdown, value: ocmeinfo.som@ucsf.edu]
- ReplyTo - Full Name: [Text Box, value: UCSF Continuing Education]
- CC: [Text Box]
- BCC: [Text Box]
- Email: [Rich Text Editor]

The 'Available Merge Fields' list on the left includes:

- {FullName}
- {LastName}
- {FirstName}
- {Salutation}
- {OrderDetails}
- {LoginDetails}
- {Organization}

The rich text editor has a toolbar with icons for text formatting and a list of 'Available Merge Fields'. The bottom of the window shows the URL: `/admin/Finance/EditProduct.aspx?ItemId=7580`.

Fields here are self-explanatory. Messages can be created from scratch or reused by selecting a previous from the [Load Existing](#) dropdown to customize.

Note the [Available Merge Fields](#) that can be inserted into your message for personalization.

3c. Complete the Information in the Packages Tab

Like the [Promotional Products](#) tab, the [Packages](#) tab allows you to create exhibitor or promotional opportunity packages.

The screenshot shows the 'Packages' tab in a software interface. At the top, there are three tabs: 'Exhibit Information', 'Promotional Products', and 'Packages' (which is active). Below the tabs, there is a 'Package Opportunity Override' field with a value of '0' and a 'Save Override' button. Below this is an 'Add Package' button. At the bottom, there is a table with four columns: 'Package Name', 'Edit Package', 'Edit Product', and 'Delete'.

Package Name	Edit Package	Edit Product	
Exhibit Package	Edit	Edit	Delete
Industry Registration	Edit	Edit	Delete

From this screen, you can edit packages and/or their products, add new packages, or remove them from the available opportunities.

[Package Opportunity Override](#) allows you to override the limit of TOTAL available exhibitor opportunities for the event. For example, if you offer a total of three packages, each with a cap of five available for purchase, you will be advertising a total of 15 opportunities. If you, however, only have space for 12 tables onsite, you would enter 12 in this field to allow up to 5 of each package to be purchased until sold out or until the total of all packages reaches 12. All packages will then become “sold out.” Click [Save Override](#) if adjusted.

- To create a new Package, click Add Package to open the package dialog box.

The screenshot shows the 'Add Package' dialog box. It contains the following fields and controls:

- Promotion: [Dropdown menu]
- * Package Name: [Text input field]
- Recognition as Level Name: [Text input field]
- Level: [Dropdown menu with "-- Select Default --"]
- * Cost: [Text input field]
- * Limit: [Text input field]
- * Exhibitor Badges: [Text input field]
- Food/Beverages: [Dropdown menu with "-- Select Default --"]
- Exhibit Location: [Dropdown menu with "-- Select Default --"]
- Display Space: [Dropdown menu with "-- Select Default --"]
- Additional Fees: [Dropdown menu with "-- Select Default --"]
- * Start Date: [Calendar icon, [Text input field], [Clock icon], [Info icon]
- * End Date: [Calendar icon, [Text input field], [Clock icon], [Info icon]
- * Deadline: [Calendar icon, [Text input field], [Clock icon], [Info icon]
- Roster of Attendees: [Checkbox]
- Package Active: [Checked checkbox]
- [Save button]

At the bottom of the dialog box, the URL 'ExhibitPackage.aspx?EventId=20083&ExhibitID=14' is displayed.

- Complete the fields in the dialog and click Save to add a new package.
 - **Promotion** – select from the available promotional items created previously. You can add any number to include as part of the package.
 - **Package Name** – this is the internal name for your identification (**required**); e.g., “Platinum” or “Small Exhibit Booth”
 - **Recognition as Level Name** (if using a tiered package structure) to recognize the vendor, such as “Platinum Level”
 - **Level** – choose the level of recognition from the list
 - **Cost** – the exhibit fee (**required**)
 - **Limit** – the total number available for purchase (**required**)
 - **Exhibitor Badges** – the number of booth personnel allowed to attend (required). These individuals (when named) will be added as Exhibitor Attendees, but not as Participants in the event. *In cases where exhibitors want to attend for credit, they must register separately as a participant using the REGISTER tab on the [Course Details](#) page.*
 - **Food/Beverages** – select and F&B privileges included with the badge; select **Other** to enter a custom combination
 - **Exhibit Location** – select how booth/table locations are determined; select **Other** to enter a custom location
 - **Display Space** – select a description of the space being purchased, such as number of tables, chairs, linens, electricity, etc; select **Other** to enter a custom display space
 - **Additional Fees** – select any additional fees not included in the booth purchase, such as electricity, shipping, etc.
 - **Start Date** – enter the first date the package is available for purchase and appears on the Portal (**required**, but time is optional)
 - **End Date** – enter the last date the package is available for purchase and disappears from the Portal (**required**, but time is optional)
 - **Deadline** – enter the date that you need a commitment for purchase; the package remains displayed but greyed out (required). Best practice is to set the End and Deadline dates to be the same.
 - **Roster of Attendees** – indicates whether a course roster is included with the purchase. **Per ACCME standards, providers MUST get active, affirmative opt-ins from attendees to share their names or contact information. This is not the same as passively opting in unless they opt out. UCSF CME does not currently require this at registration, so this box should not be checked.**
 - **Package Active** – check this to display the package on the Portal.
- If there are certain items or conditions you use frequently that are not available in the following dropdown lists, please submit a Support Ticket to have them added as defaults. Please do not request to add items used infrequently to keep the lists concise. Suggestions to clarify or reword existing options are also welcome; OCME will discuss it internally and advise if we can make the change.
 - Level
 - Display Space
 - Food/Beverage
 - Exhibit Location
 - Additional Fees
 - Promotional Items

Step 4. Preview what Exhibitors will See before Publishing

1. Preview your packages in the Portal by navigating back to your activity in the [Activity Manager](#). Click the [View in Portal](#) link, and open the [EXHIBITORS](#) tab.
2. When everything is to your liking, toggle the [Exhibitor Registration Active](#) toggle to on. This will display the [Exhibit at this Event](#) button in the Portal.
3. UCSF' W-9 is automatically available for download if required.
4. Exhibitors can select packages to purchase and pay by credit card, e-check/ACH, or paper check.
5. If a package includes exhibitor badges, the receipt / confirmation email the purchaser receives will contain a link to "Manage Registrations." On this special page, they can add up to the maximum number of personnel, edit personnel, or remove them from the exhibit. **Note, this link is ONLY available in the confirmation email. If it is lost, the exhibitor will need to bring up a duplicate receipt from the My CME tab on the Portal home page.**
6. Registering as personnel for an exhibit is not the same as registering as a participant. If an exhibitor wishes to attend for credit, they must register through the REGISTER tab or be added to the roster on the Record Attendance screen. (See Recording Attendance resources for instructions).
7. Once you have opened registration for your exhibitors, include a link to your activity's Course Details page in the CE Portal with instructions to review the EXHIBITORS tab.

Step 5. Save Exhibitor Agreements

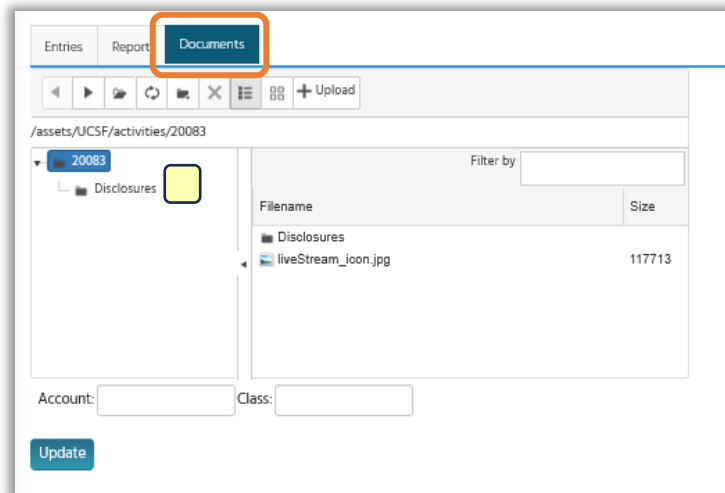
When a **Commercial Support Agreement** (either OCME's Standard Agreement or the vendor's agreement) is fully executed, it can be uploaded to the activity from this screen.

(See templates for commercial support, exhibit, product theater, and in-kind agreements in the [OCME Course Commercial Support Documents folder](#).)

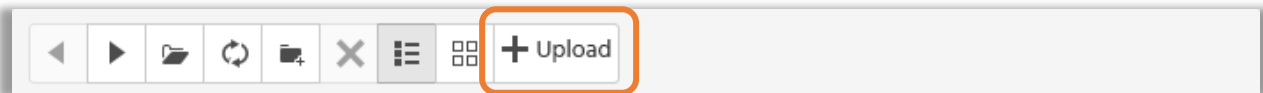
1. Open your activity in the Activity Editor; select the Documentation > Documents subtab.
2. If it doesn't already exist, create an "Agreements" folder.
 - a. Click the New Folder icon.



- b. Enter "Agreements" as the folder name.
 - c. Click OK.
3. Double-click the [Agreements](#) folder to open it.
 4. Using the standard naming convention below to rename your agreement document.
 - a. **COURSENUMBER_GRANT_COMPANY_\$AMT** (for commercial support)
 - b. **COURSENUMBER_EXH_COMPANY_\$AMT** (for a regular exhibit)
 - c. **COURSENUMBER_LAB_COMPANY_\$AMT** (for a wet lab)
 - d. **COURSENUMBER_PRODUCTTHEATER_COMPANY_\$AMT** (for a product theater)
 - e. **COURSENUMBER_INKIND_COMPANY_\$AMT** (for in-kind/non-monetary support)
 - f. *Use multiple identifiers if the agreement covers more than one kind of support, for example:*
 - i. **MOT26001_EXH_PRODUCT THEATER_MERCK_\$28k**
 - ii. **Or MOT26001_EXH_LAB_MERCK_\$10k**
 5. Click the [Upload](#) button and select your document to store it.



new



Viewing Exhibitor Registrations and Income

There are four sources for monitoring exhibitor registrations and income: three reports and the Budget tool.

To view reports, navigate to Reports from the main menu, then search for your activity.

In the **Exhibitors** tile, select [Exhibitor Attendee Report](#).

Exhibitor Attendee Report

Instructions: Select an event from the dropdown and click generate report. This will generate a paid registrant list handout. The grid may also be exported to excel.

Activity Name... ☐ Parents Only [Generate Attendee List](#)

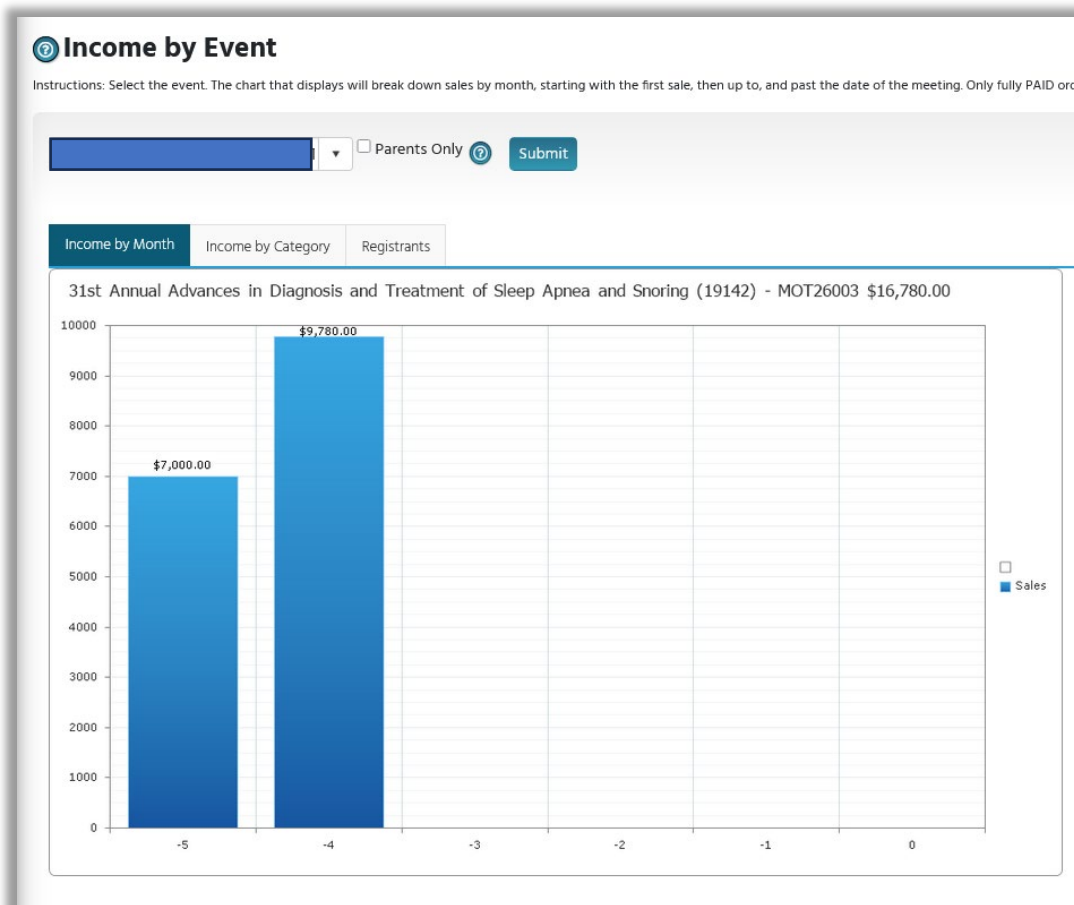
[Export XLS](#) [Save Layout](#) [Reset](#)

Last Name	First Name	Degree	Organization	City	State	Country

No records to display.

- This report displays a list of exhibitors that have registered for or have been added to the activity in a table.
- You can sort and filter the table by columns.
 - Click the column name to toggle ascending or descending sort, or right-click the column header to select or clear the sort option.
 - To filter by a column, enter a search term in the field under the column header, then select the filter icon to choose the logic for the filter. Choose NoFilter to clear it.
- You can also hide columns you don't use often.
 - Right-click on the column header and select Columns from the menu. Uncheck those you want to hide.
 - Repeat the process to add them back.
 - Click Save Layout to make this change permanent. Click Reset to restore to system defaults.
- Click Generate Attendee Report for a simple list of attendees downloadable in Word.

In the **Finance** tile, select **Income by Event**.



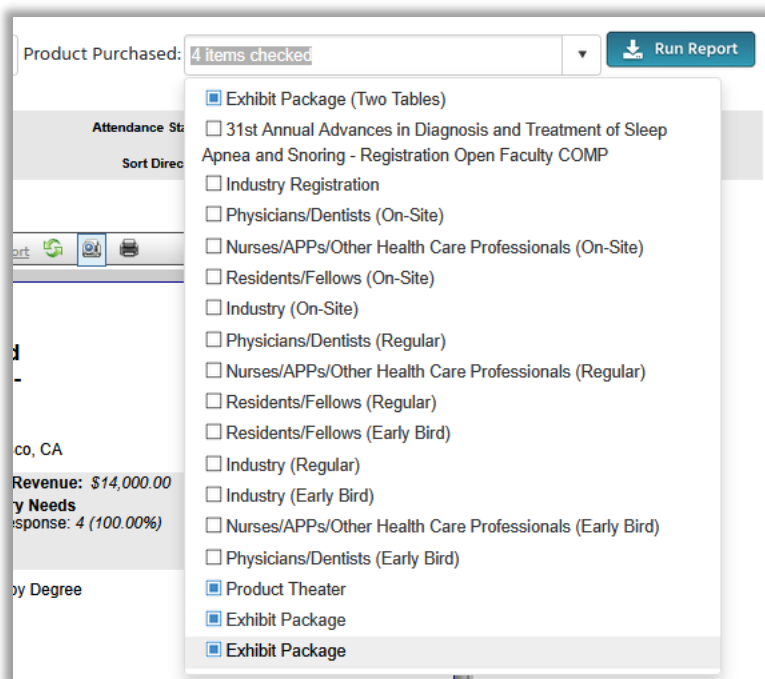
- This report shows all revenue received for the event, including all Registration products and Exhibitor products.
- Each of the three tabs shows the data in different ways, and each can be filtered and sorted by column.
 - Income by Month** is a graph of all revenue received by month starting with the month products opened until "Month 0" (shown above).
 - Income by Category** shows a list of revenue received by category, the payment method, and the total for each category. Use the blue carat to collapse and expand lists (shown below).

▼ Description: Bronze				
Bronze	PAID	1	\$10,000.00	MasterCard
		Sum : 1	\$10,000.00	
▼ Description: Health Care and Advanced Practice Professionals (Early Bird)				
Health Care and Advanced Practice Professionals (Early Bird)	PAID	1	\$300.00	Visa
		Sum : 1	\$300.00	
▼ Description: Industry Professionals (Early Bird)				
Industry Professionals (Early Bird)	PAID	1	\$899.00	MasterCard
Industry Professionals (Early Bird)	PAID	2	\$1,798.00	Visa
		Sum : 3	\$2,697.00	
▼ Description: Patient Advocates				

- Registrants** shows a table of revenue, payment status, category, payor and amount. It can be exported to Excel.

In the **Finance** tile, select [Registrations](#).

- This is a powerful report – see the Resources page for more details on using it.
- This report displays both attendee and exhibitor registrations and revenue received in a chart and tabular format. The report is customizable, downloadable, and printable.
 - Filter data by:
 - Date range
 - Specific products purchased
 - Paid, Unpaid, or All
 - All Registrations, All Attended, or No Shows
 - Sort Data by Name, Date, ascending or descending
 - Export to:
 - PDF
 - CSV
 - Excel 97
 - Rich Text Format (RTF)
 - TIFF (image)
 - HTML
 - XPS
- Use the **Product Purchased** field to isolate your targeted exhibitor packages and click [Run Report](#).
 - View who purchased the package, their company name, and the amount, grouped by category/package.



- Select the [Data tab](#) to view the information in a tabular format that can be exported to Excel.
- Select the [Email tab](#) to contact your exhibitors once filtered.
- Select the [Badges & Signin Sheets](#) to create **Exhibitor Badges** and **Attendee Lists**.
 - Choose “**_UCSF BadgeTemplateExhibitors**” to print the standard 4x3” 6-up badges.
 - Alternatively, export the list to Excel to send to a printer to prepare badges.
- Automate reports to be sent by email at a certain cadence to anyone you choose.
 - Select [Automated Report Settings](#) to set up the frequency and recipient(s).
 - Reports can be sent Daily, Weekly, or Monthly (the date and time, however, cannot be specified).

- You include data from the Past Day, Past Week, Past Month, or All to Date
- You can filter by pay status: Paid, AR (Accounts Receivable=Unpaid), All

CloudCME™

Create New Automated Report

Instructions: To create a new Automated Report, select the desired options from the dropdown lists in the first column, then click Save New Report. Once the report has been created, make sure that report is selected (it will be highlighted in the Current Automated Reports list), then add email recipients.

Instructions: To edit an existing report or add additional recipients, click Select next to the report, then modify the report above.

Send the Report:

Daily

Event #19142 - 31st Annual Advances in Diagnosis and Treatment of Sleep Apnea and Snoring

Include Data from:

Past Day

Pay Status:

Paid

Send the Report To:

Enter Email Address

Add Email

Report Recipients List:

Email	
Nicholas.Dennie@ucsf.edu	Delete
tym.peters@ucsf.edu	Delete

Save New Report

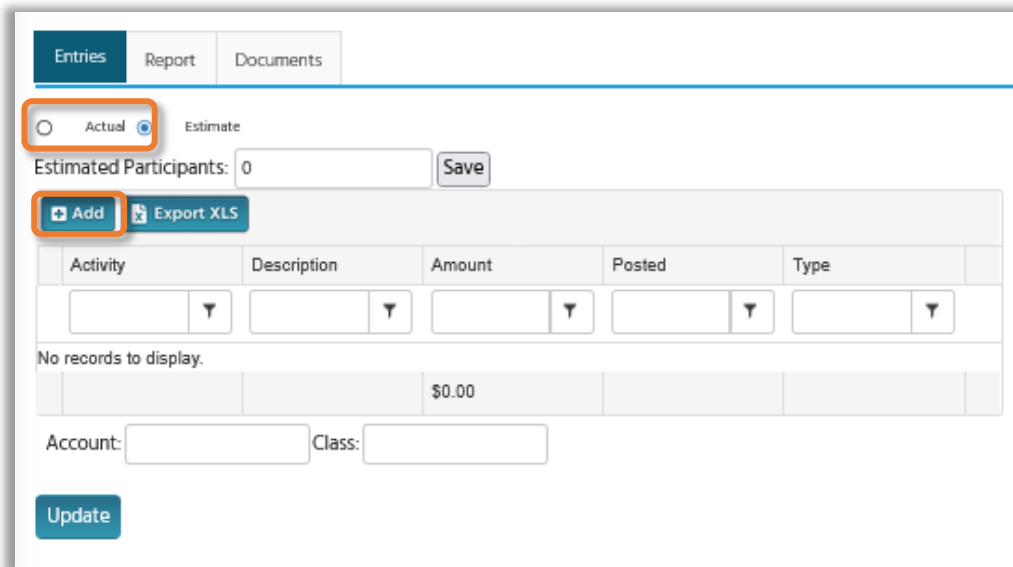
Current Automated Reports

	ReportSettingId	Freq/Date	Range	Pay Status	EventId	EventName	Recipients	
Select	5721	Weekly	To Date	All	17282	Medicine of the Extremes: Wilderness, Austere, Tactical, Global 2025	2	Delete
Select	5784	Weekly	To Date	Paid	15258	RISE UP for Breast Cancer 2026	2	Delete

/admin/administrators/automatedreportingsettings.aspx?ReportName=RegistrationSummary&EID=19142

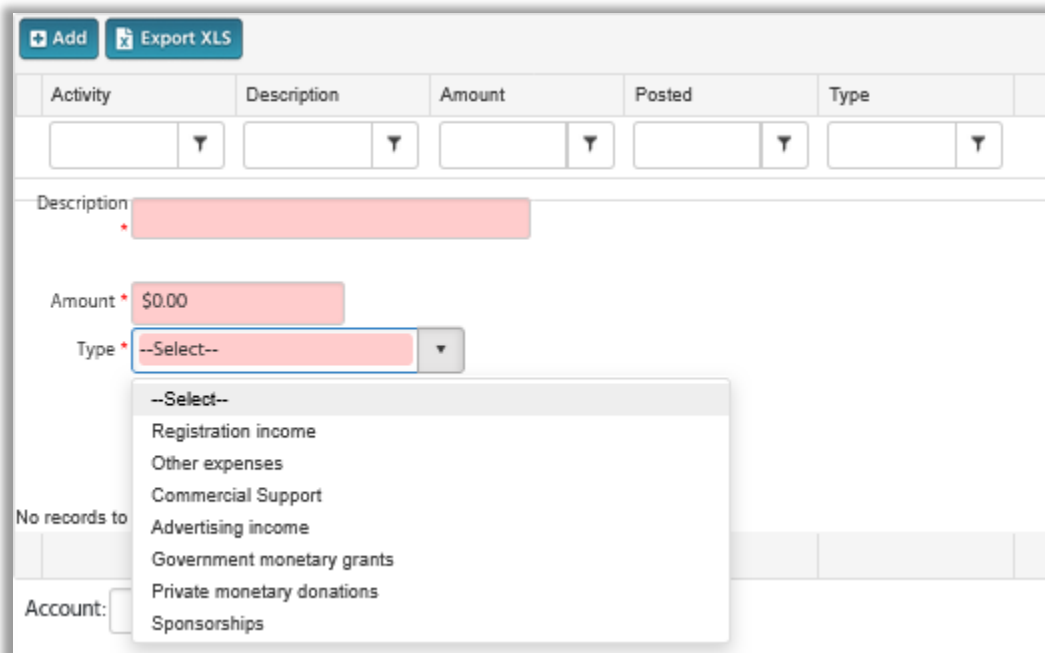
Use the CE Portal Budget Tool for Tracking (Optional)

1. From the Main Menu, navigate to [Finance>Budget](#), and search for your activity. The **Activity Budget Screen** will appear with three tabs: [Entries](#), [Report](#), [Documents](#).



The screenshot shows the 'Activity Budget Screen' with three tabs: 'Entries', 'Report', and 'Documents'. The 'Entries' tab is active. Below the tabs, there are two radio buttons: 'Actual' (selected) and 'Estimate'. Below these, there is a field for 'Estimated Participants' with the value '0' and a 'Save' button. Below that, there are two buttons: 'Add' (highlighted with a red box) and 'Export XLS'. Below the buttons, there is a table with columns: 'Activity', 'Description', 'Amount', 'Posted', and 'Type'. The table is currently empty, and a message 'No records to display.' is shown. Below the table, there are fields for 'Account:' and 'Class:', and an 'Update' button.

2. In the [Entries](#) tab, select the [Estimate](#) radio button. Here you can optionally enter your estimated number of participants.
3. Click the [Add](#) button.



The screenshot shows the 'Add' form in the 'Activity Budget Screen'. The 'Add' button is highlighted with a red box. Below the 'Add' button, there is a table with columns: 'Activity', 'Description', 'Amount', 'Posted', and 'Type'. The table is currently empty, and a message 'No records to display.' is shown. Below the table, there are fields for 'Description', 'Amount', and 'Type'. The 'Description' field is highlighted with a red box. The 'Amount' field is set to '\$0.00'. The 'Type' dropdown menu is open, showing options: '--Select--', 'Registration income', 'Other expenses', 'Commercial Support', 'Advertising income', 'Government monetary grants', 'Private monetary donations', and 'Sponsorships'. Below the 'Type' field, there is an 'Account:' field.

4. Enter the solicited exhibitor as the **Description**.
5. Enter the amount expected; it may be safest to choose the smallest package price..
6. For **Type**, select "Advertising income."
7. Click [Save](#).

When funds are received by exhibitors, they will be added to the **Actual** section of the **Entries** tab **automatically** (or manually by OCME if payment is by check). This information will not only appear in revenue reports but also help track who has pledged to exhibit vs. those who've registered and paid.

Tracking exhibitors and promotional opportunities in the system automatically adds your supporters to generated documentation within the system, and it also improves OCME's reporting to the accreditors and our ability to track down and claim your funds as they come into the University.

EntriesReportDocuments

Actual

Estimate

Drag a column header and drop it here to group by that column

Add

Export XLS

ID	Activity	End Date	Description	Company	Ref#	Amount
76	LIVE COURSE TRAINING: Paging Dr. Google: Interprofessional Strategies to Combat Misinformation in Patient Care Edit	10/31/2025 3:00:00 PM	Grant from Some Test Company	BIOS Strategic Partners		\$10,000.00
						\$10,000.00

Account:Class:

Update

The **Report** tab provides a summary of transactions.

EntriesReportDocuments

2

of 2

Export to the selected format

Export

UCSF

University of California
San Francisco

Activity Budget Summary

LIVE COURSE TRAINING: Paging Dr. Google:
Interprofessional Strategies to Combat
Misinformation in Patient Care

Estimated

Commercial Support

Order # Test Company

10/25/2025 Test Company

Test Company - Sub-total

Commercial Support - Sub-total

Estimated - Total

\$10,000.00

\$10,000.00

\$10,000.00

\$10,000.00

Actual

Commercial Support

Order # Grant from Some Test Company

10/25/2025 Grant from Some Test Company

Cash

Grant from Some Test Company - Sub-total

Commercial Support - Sub-total

Actual - Total

\$10,000.00

\$10,000.00

\$10,000.00

\$10,000.00

University of California, San Francisco

Page 2

10/25/2025 8:18:23 PM

Exhibitor Portal Samples

Following are some examples of promotional opportunities, from single to multiple items, and the use of sponsor levels (if desired).

Figure 1. A simple, single 6' tabletop exhibit.

[W9 Form](#) [Exhibit at this Event](#)

Exhibitor Packages

Exhibitor Package - Exhibit Package Price: \$4000.00

Includes:

- Recognition as a Exhibit Package Exhibitor
- (1) 6ft. Tabletop display, chairs, linen and skirting
- Number of Exhibitor Badges: 3
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- Additional Exhibitor Fees (standard electric, power strip) are exhibitor's responsibility
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/13/2026 5:00:00 PM.

Figure 2. Multiple exhibitor packages and promotional items.

[W9 Form](#) [Promotional Items](#) [Exhibit at this Event](#)

Exhibitor Packages

Exhibitor Package - Exhibit Package Price: \$3500.00

Includes:

- (1) 6ft. Tabletop display, chairs, linen and skirting
- Number of Exhibitor Badges: 2
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- Product to be shipped directly to facility by exhibitor at own cost. Call for details.
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/14/2026 12:00:00 PM.

Exhibitor Package - Industry Registration Price: \$895.00

Includes:

- Number of Exhibitor Badges: 1

Deadline for order commitment is 2/14/2026 12:00:00 PM.

Promotional Items

Exhibitor Promotional Option - Attendee Bag Price: \$500.00

Recognition of your company logo or CloudCME's logo (your choice) will be seen daily on bags used by attendees. Opportunity to support the exclusive conference attendee bag is available to exhibitors on a first-come, first-served basis. This fee includes cost of the product. >>

Industry supporter is permitted one promotional insert which requires pre-approval by the Program Manager

Insert to be provided by supporter at own cost and shipped directly to Program Manager

1. Max size 8.5" x 11". Please limit insert to one page.
The bags will be distributed during the on-site registration along with conference materials
Payment is due prior to the conference

Deadline for order commitment is 12/31/2035 11:00:00 PM.

Figure 3. Product Theater as a package.

[W9 Form](#)[Exhibit at this Event](#)

Exhibitor Packages

Exhibitor Package - Table Top Exhibit Price: \$4000.00

Includes:

- (1) 6ft. Tabletop display, chairs
- Number of Exhibitor Badges: 2
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- 500
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/14/2026 12:00:00 AM.

Exhibitor Package - Product Theater Price: \$17500.00

Includes:

- Number of Exhibitor Badges: 2

Deadline for order commitment is 1/30/2026 12:00:00 AM.

Figure 4. Level packages, Bronze to Platinum with commensurate benefits.

[W9 Form](#)[Exhibit at this Event](#)

Exhibitor Packages

Exhibitor Package - Platinum Level Price: \$75000.00
Includes:

- Recognition as a Platinum Level Exhibitor
- (1) 6ft. Tabletop display, chairs
- Number of Exhibitor Badges: 5
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/12/2026 12:00:00 PM.

Exhibitor Package - Gold Price: \$50000.00
Includes:

- Recognition as a Gold Exhibitor
- (1) 6ft. Tabletop display, chairs
- Number of Exhibitor Badges: 4
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/12/2026 12:00:00 PM.

Exhibitor Package - Silver Price: \$25000.00
Includes:

- Recognition as a Silver Exhibitor
- (1) 6ft. Tabletop display, chairs
- Number of Exhibitor Badges: 3
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/12/2026 12:00:00 PM.

Exhibitor Package - Bronze Price: \$10000.00
Includes:

- Recognition as a Bronze Exhibitor
- (1) 6ft. Tabletop display, chairs
- Number of Exhibitor Badges: 2
- Exhibit Location: Tables will be Pre-Assigned

Deadline for order commitment is 2/12/2026 12:00:00 PM.

Exhibitor Package - Rise Up Test Exhibit - OKAY Price: \$2500.00
Includes:

- Recognition as a Rise Up Test Exhibit Exhibitor
- Number of Exhibitor Badges: 3

Deadline for order commitment is 2/21/2026 5:00:00 PM.

Exhibitor Package - Copper Level Price: \$5000.00
Includes:

- Recognition as a Copper Level Exhibitor
- Number of Exhibitor Badges: 1

Deadline for order commitment is 2/12/2026 5:00:00 PM.

Figure 5. Tiered packages and promotional items (CloudCME example).

Exhibitor Packages

Exhibitor Package - Gold Price: \$10000.00

Includes:

- (2) 6ft. Tabletop display, chairs, linen and skirting
- Number of Exhibitor Badges: 4
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- Additional Exhibitor Fees (standard electric, power strip) included
- Exhibit Location: Assigned
- Promotional Items:
 - Attendee Bag

Deadline for order commitment is 10/22/2026 11:00:00 PM.

Exhibitor Package - Silver Price: \$5000.00

Includes:

- Recognition as a Silver Level Exhibitor
- (1) 6ft. Tabletop display, chairs, linen and skirting
- Number of Exhibitor Badges: 4
- Complimentary continental breakfast and refreshments (available with Exhibitor Badge)
- Additional Exhibitor fees (standard electric, power strip) waived
- Exhibit Location: Premium
- Promotional Items:
 - T-Shirts
 - Lanyard

Deadline for order commitment is 10/22/2026 11:00:00 PM.

Promotional Items

Exhibitor Promotional Option - Attendee Bag Price: \$500.00

Recognition of your company logo or CloudCME's logo (your choice) will be seen daily on bags used by attendees. Opportunity to support the exclusive conference attendee bag is available to exhibitors on a first-come, first-served basis. This fee includes cost of the product. >>

Industry supporter is permitted one promotional insert which requires pre-approval by the Program Manager

Insert to be provided by supporter at own cost and shipped directly to Program Manager

1. Max size 8.5" x 11". Please limit insert to one page.

The bags will be distributed during the on-site registration along with conference materials

Payment is due prior to the conference

Deadline for order commitment is 10/22/2026 11:00:00 PM.

Exhibitor Promotional Option - T-Shirts Price: \$30.00

Conference T-shirts available with your company logo on the front.

Deadline for order commitment is 10/22/2026 11:00:00 PM.