Cvent | How to setup payment information [1]
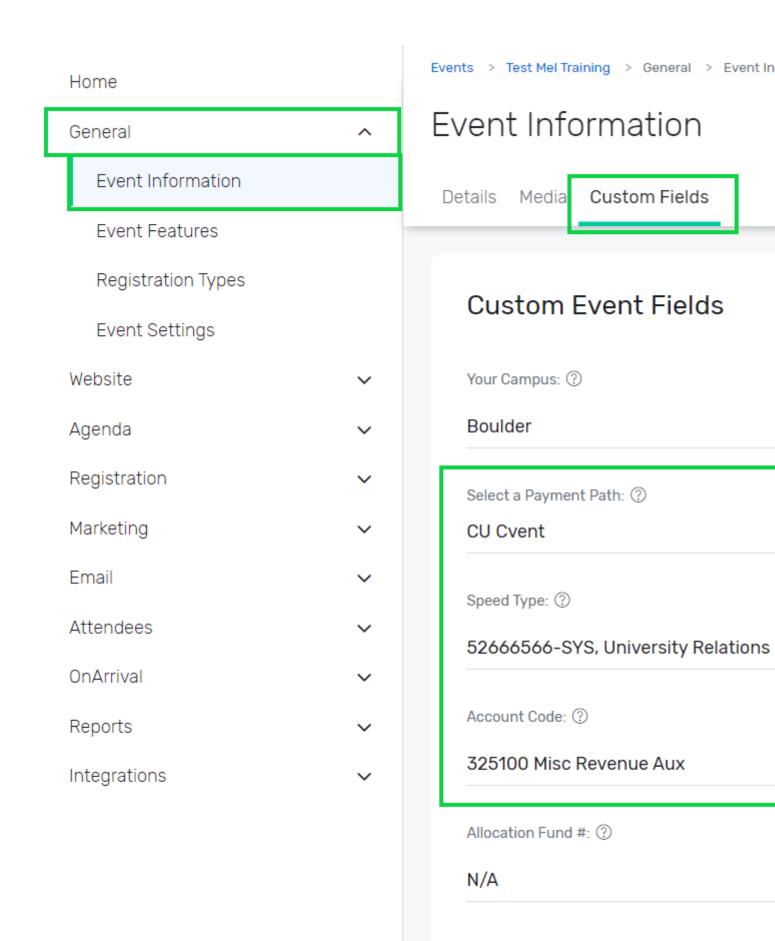
February 15, 2021 by Melanie Jones [2]

IMPORTANT Users cannot add new financial information to Cvent. They must submit a request for new details to be added to Cvent via their eComm Specialist. eComm Specialists please submit a ticket [3] to System eComm to complete this action.

1. Setup Custom Event Fields

The custom event fields ensure money collected in Cvent will make its way back to event planners [4]. To do this, we need your department's SpeedType and Account Code added to Cvent (via an eComm specialist). These details can then be added to your specific event during the initial event creation process or edited after:

- Under **General** >> **Event Information** >> **Custom Fields** tab
- Click the blue **Edit** button in the top right corner if you need to make changes.
- If collecting money, select **CU Cvent** OR **CU Foundation Cvent**.
- If you selected CU Cvent, choose your department's **SpeedType** and **Account Code**. If you selected CU Foundation Cvent, choose your department's **Designation Code** (Allocation Fund # was retired in Summer 2023 with the launch of CU Ascend).
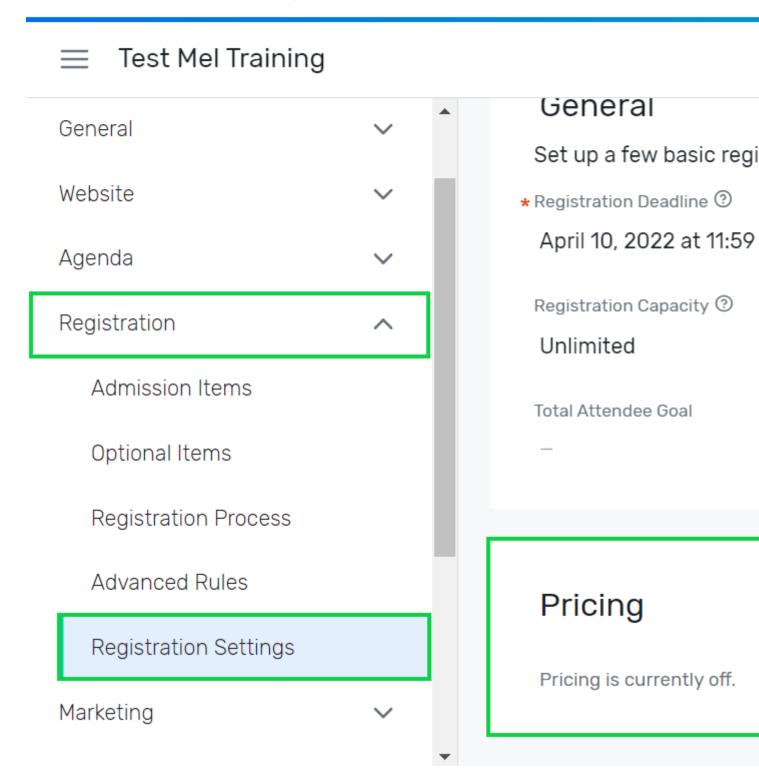- **Save** these details with the blue button in the top right corner.

Home

General ^

    Event Information

    Event Features

    Registration Types

    Event Settings

Website ∨

Agenda ∨

Registration ∨

Marketing ∨

Email ∨

Attendees ∨

OnArrival ∨

Reports ∨

Integrations ∨

Event Information

Details   Media   **Custom Fields**

Custom Event Fields

Your Campus: ⑦

Boulder

Select a Payment Path: ⑦

CU Cvent

Speed Type: ⑦

52666566-SYS, University Relations

Account Code: ⑦

325100 Misc Revenue Aux

Allocation Fund #: ⑦

N/A

2. Configure Registration Settings

- Expand **Registration** >> Click **Registration Settings**
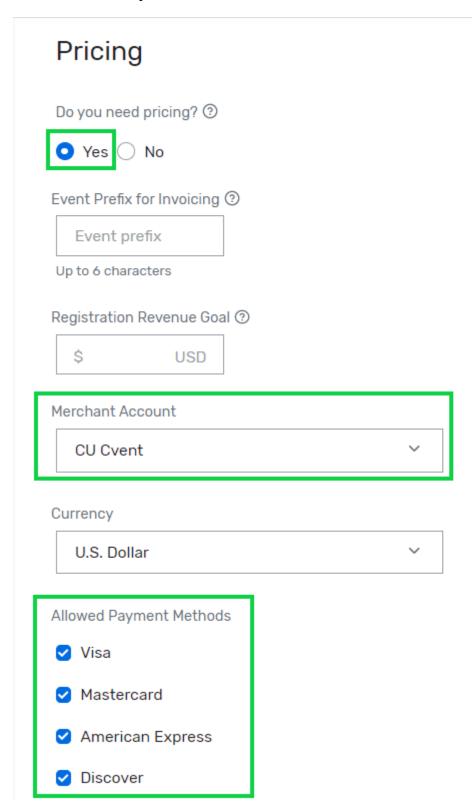- Scroll to the **Pricing** section >> select the **pencil icon**

cvent | EVENT   All Event

≡   Test Mel Training

		General
General	⌄	Set up a few basic regi
Website	⌄	* Registration Deadline ⑦
Agenda	⌄	April 10, 2022 at 11:59
Registration	⌃	Registration Capacity ⑦
Admission Items		Unlimited
Optional Items		
Registration Process		Total Attendee Goal
Advanced Rules		—
Registration Settings		**Pricing**
Marketing	⌄	Pricing is currently off.

- **Do you need pricing? Yes**
- **Merchant Account = CU Cvent** OR **CU Foundation Cvent** if collecting payment.
  IMPORTANT: Ensure that the merchant account you choose in this section matches the

merchant account you selected in step one.
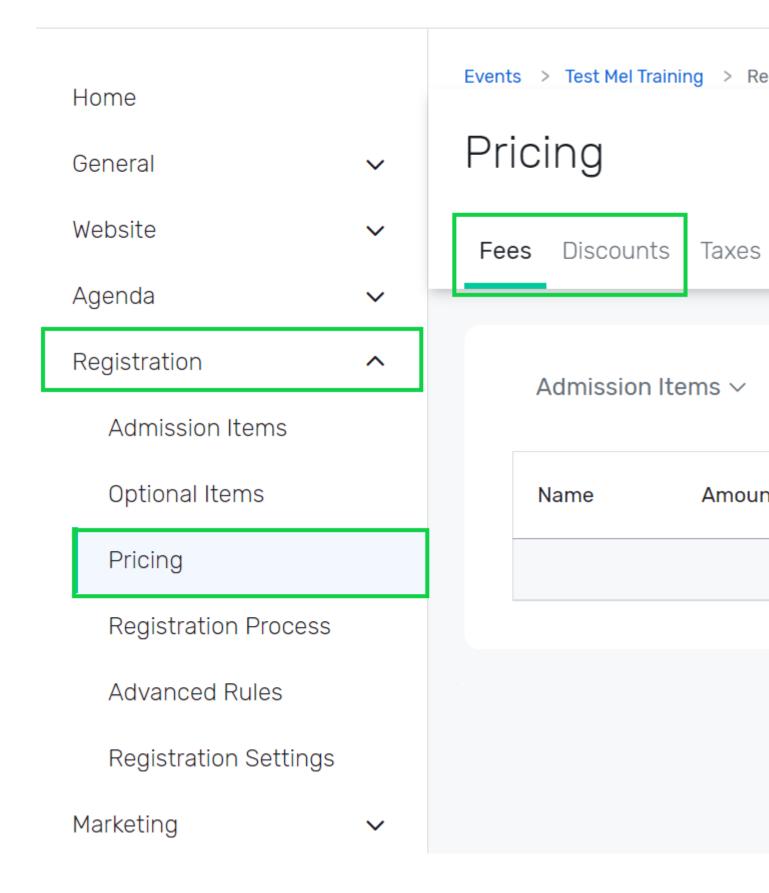- **Allowed Payment Methods: All checked**

Pricing

Do you need pricing? ⑦

⬤ Yes   ◯ No

Event Prefix for Invoicing ⑦

[Event prefix]

Up to 6 characters

Registration Revenue Goal ⑦

[$ USD]

Merchant Account

[CU Cvent   ⌄]

Currency

[U.S. Dollar   ⌄]

Allowed Payment Methods

☑ Visa

☑ Mastercard

☑ American Express

☑ Discover

3. Set Pricing (including Refunds & Discounts)

- Expand **Registration** >> select **Pricing**
- Click the blue **Edit** button in the top right to add a price
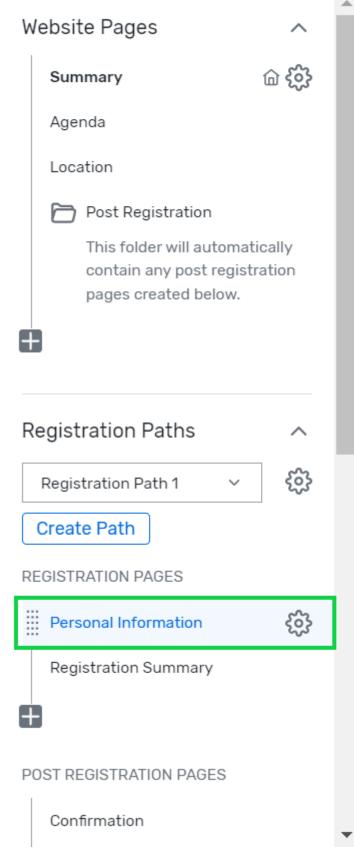 - You can add a **refund policy** or **early bird pricing** once the price is set

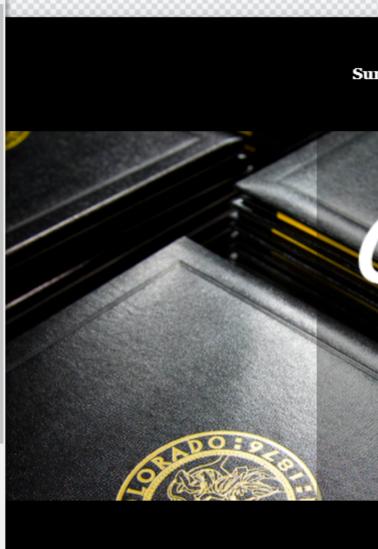- Navigate to the **Discounts** tab if giving discounted admission

Test Mel Training

Home

General ⌄

Website ⌄

Agenda ⌄

Registration ⌃

    Admission Items

    Optional Items

    Pricing

    Registration Process

    Advanced Rules

    Registration Settings

Marketing ⌄

Events > Test Mel Training > Re

Pricing

Fees   Discounts   Taxes

Admission Items ⌄

Name	Amoun

4. Add Payment Widget

- Navigate to **Website** >> **Event Website**
- Select the blue **Open Site Designer** button
- In the top left, click **Summary** in the top left to open the page navigation. Scroll and select the **Personal Information** page

Website Pages ⌃

Summary 🏠 ⚙️

Agenda

Location

📁 Post Registration

This folder will automatically contain any post registration pages created below.

➕

Registration Paths ⌃

Registration Path 1 ⌄ ⚙️

Create Path

REGISTRATION PAGES

⸬ Personal Information ⚙️

Registration Summary

➕

POST REGISTRATION PAGES

Confirmation

- Drag the **Payment** widget into the Personal Information page (or the last page of your registration process)

- You can enable/disable **Offline/Other** as a payment method by using the panel on the right (when the Payment widget is selected)
- Don't forget to **Save** or **Publish**

Paymer

Select Payment Method

🔵 Credit Card

Total Due $120.00

VISA · mastercard · AMERICAN EXPRESS · DISCOVER

* **Credit Card Number**

* Expir

* **Name on Card**

* **Country/Region**

Select country/region ⌄

* **Address 1**

Optional Donations

Only designated Cvent fundraising event forms are permitted to collect optional donations. Event planners hosting non-fundraising events who want to encourage optional donations from event registrants should provide a link to the associated fund page on the CU Foundation giving site [5].

Related Content

- Paid Event Overview [4]
- What account code should I use? [6]
- What speedtype should I use? [6]
- What allocation code should I use? [6]
- How do I get an account code, speedtype, or designation code added to Cvent? [7]*

Display Title:
Cvent | How to setup payment information
Send email when Published:
No