

Cvent | How to setup payment information ^[1]

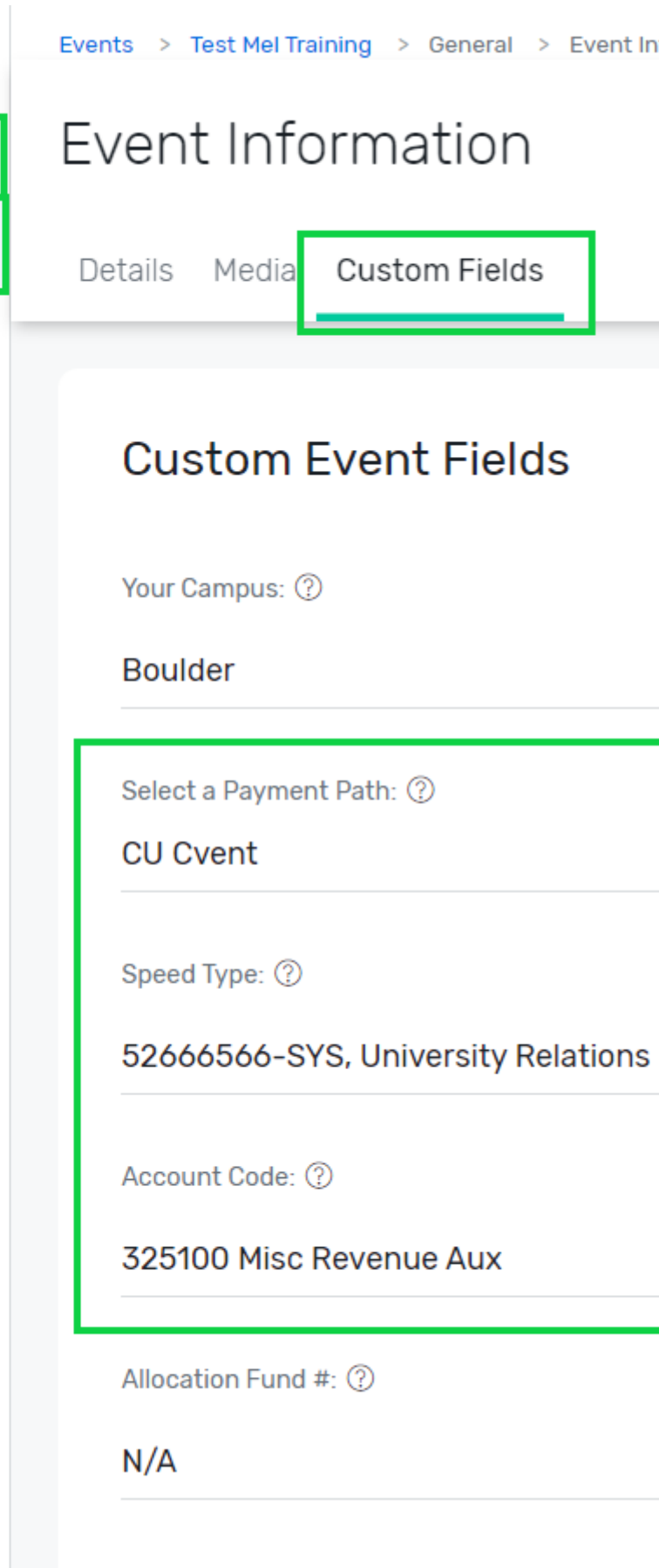
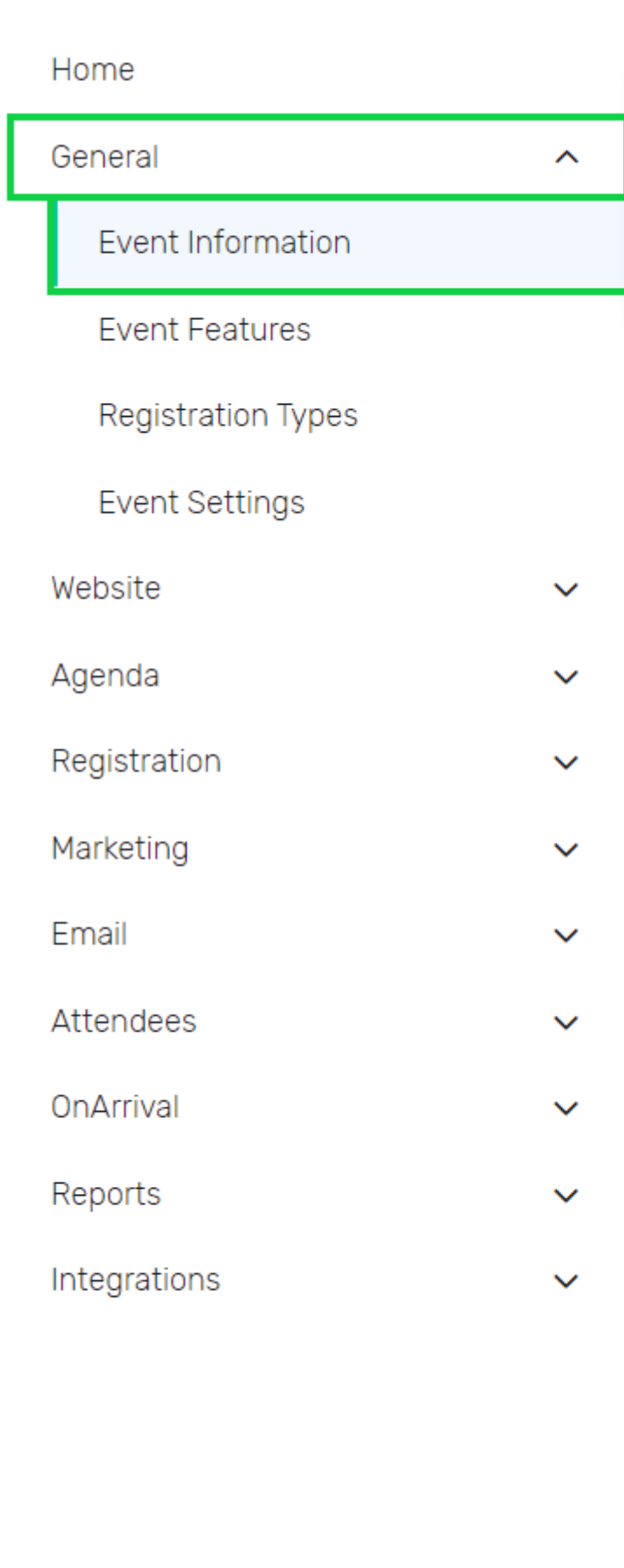
January 28, 2025 by [Melanie Jones](#) ^[2]

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.



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



Website



Agenda



Registration



Admission Items

Optional Items

Registration Process

Advanced Rules

Registration Settings

Marketing



General

Set up a few basic regi

* Registration Deadline ?

April 10, 2022 at 11:59

Registration Capacity ?

Unlimited

Total Attendee Goal

—

Pricing

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? ?

☒ Yes ☐ No

Event Prefix for Invoicing ?

Event prefix

Up to 6 characters

Registration Revenue Goal ?

\$ 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

Amount

4. Add Payment Widget

- Navigate to **Website >> Event Website**
- Select the blue **Open Site Designer** button
- Click **Summary** in the top left to open the page navigation. Scroll and select the **Registration Page** you want to add the payment widget to.

WEBSITE PAGE
Summary ^

Website Pages ^

Summary



Agenda

Location



Post Registration

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



Registration Paths ^

Registration Path 1 v



Create Path

REGISTRATION PAGES



Personal Information



Registration Summary



POST REGISTRATION PAGES

Confirmation



- Drag the **Payment** widget onto the page.



Personal Information

Information below, then click Next to continue.

Accommodation requests related to accessibility should be made three-five days before the event to [CAMPUS ADA EXPERT NAME AND EMAIL or PHONE NUMBER].

Learn who your campus accessibility expert is at:

<https://www.cu.edu/blog/ecommerce-wiki/consider-accessibility>

- You can enable/disable **Offline/Other** as a payment method by using the panel on the right (when the Payment widget is selected)

?

Payment

Select Payment Method

☒ Credit Card**Total Due \$120.00**

* Credit Card Number

* Expir

* Name on Card

* Country/Region

Select country/region ▾

* Address 1

Personal Information

Build

Payment

- Don't forget to **Save** and **Publish**.

Paying Online After Registration

You can allow [Paying Online After Registration](#) [5]. This option does not allow registrants to skip the payment section of their initial registration but will provide an opportunity for the registrant to resubmit payment if their original payment failed or switch their payment type if they originally planned to pay by check and now want to pay online with a credit card.

Never Process Payment at a Later Time or Allow Partial Payments

'[Process payment at a later time](#)' [6] and '[allow partial payments](#)' [7] should never be enabled to adhere to CU's standards for protecting cardholder information. There is no exception.

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](#) [8].

Related Content

- [Paid Event Overview](#) [4]
- [Do not enable 'process payment at a later time'](#) [6]
- [Do not 'allow partial payments'](#) [7]
- [Paying Online After Registration](#) [5]
- [What account code should I use?](#) [9]
- [What speedtype should I use?](#) [9]
- [What designation code should I use?](#) [9]
- [How do I get an account code, speedtype, or designation code added to Cvent?](#) [10]*

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Send email when Published:

No

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Links

- [1] <https://www.cu.edu/blog/ecommerce-wiki/cvent-how-setup-payment-information>
[2] <https://www.cu.edu/blog/ecommerce-wiki/author/39> [3] <https://www.cu.edu/ecommerce-submit-help-ticket>
[4] <https://www.cu.edu/blog/ecommerce-wiki/cvent-paid-event>
[5] <https://support.cvent.com/s/communityarticle/Paying-Online-After-Registration>
[6] <https://www.cu.edu/blog/ecommerce-wiki/do-not-enable-process-payment-later-time>
[7] <https://www.cu.edu/blog/ecommerce-wiki/do-not-allow-partial-payments> [8] <https://giving.cu.edu/>
[9] <https://www.cu.edu/blog/ecommerce-wiki/cvent-accounting-quick-list> [10] <https://www.cu.edu/blog/ecommerce->

[wiki/add-account](#)