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New User Training | Cvent [1]

January 28, 2025 by Melanie Jones [2]

Get started by learning to create your first Cvent event.

Get Started | 0:00 - 10:40

- **Login** [3]
- **Help & Support** [4] **|** Cvent not only provides a large knowledgebase to search step-by-step tutorials but support you can contact directly. Request a call, instant message, or submit a case.
- **View Templates** [5] **|** We've made six different CU-branded templates available to all users to clone [6]. They provide a great start but can be fully customized.
- **Create Event |** The event creation process starts with providing basic event information (title, date, location, etc.). Once created, enable additional features like guest registration, sessions, or speakers before customizing further.
    - Start by clicking the blue **Create Event** button in the top-right corner. Next, you will be able to **select a CU-branded template** to clone. Alternatively, you can clone an existing event you have access to [7].

cvent | EVENTS

All Events

Events

View: Current Events

Create View

Title	Coc
Unsubscribe: eComm...	C5N
Subscribe: Employee...	GLN
Subscribe: Registrar Network Newslette...	WH
Subscribe: Budget & Fiscal News	JW
Subscribe: Benson	P3N

How do you wa

If you choose a template,

IN PERSON • OTHER/GEN

Flex Event 1-Pager Sports Inspiration

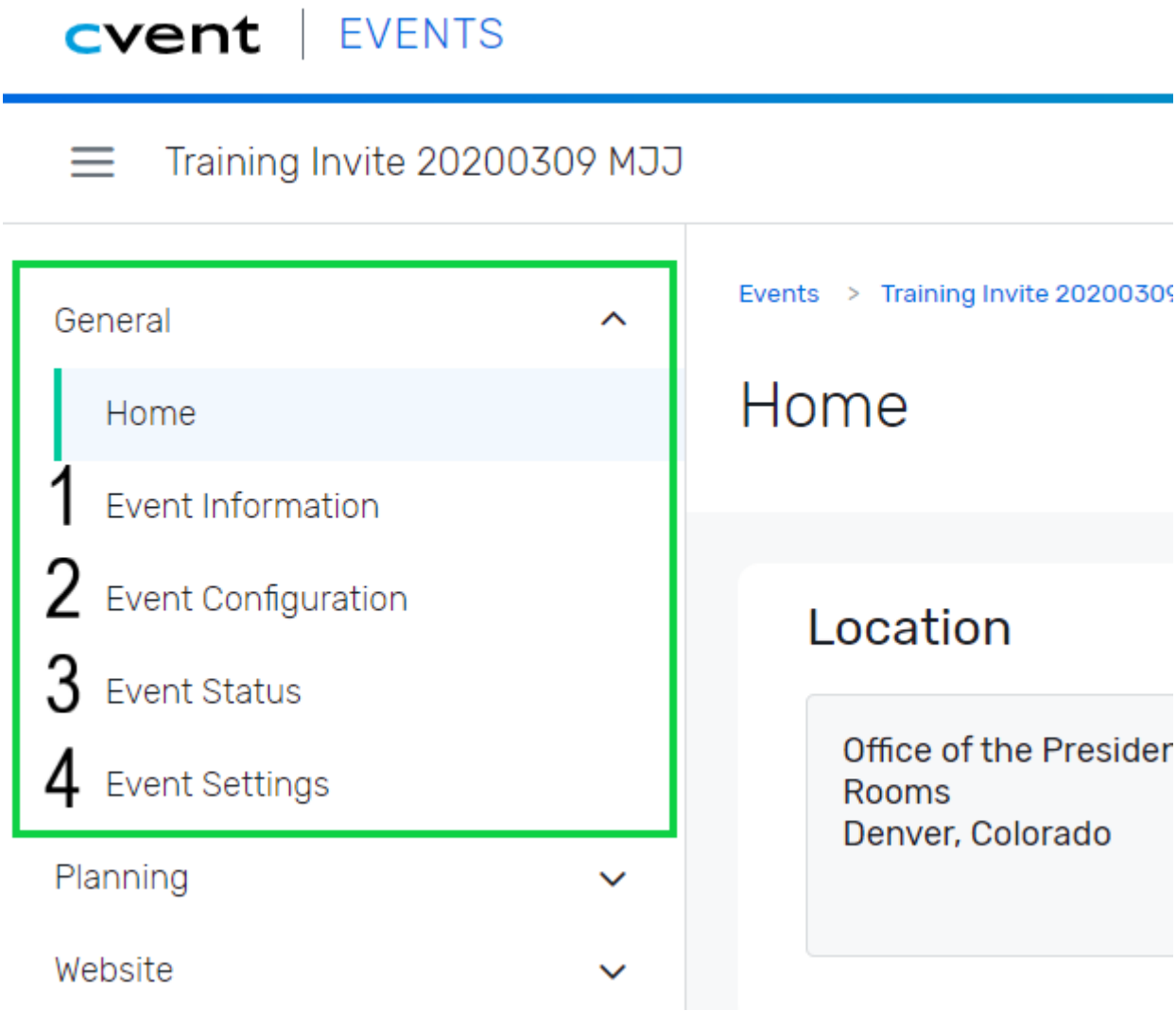
Flex Templates

IN PERSON • OTHER/GEN

Flex Event UCCS G

General | 10:40 - 13:39

1. **Event Information |** For your basic event details, such as: event title, start/end date, event planner, etc.
    - This also includes our Custom Contact Fields which play a role in getting money to your account [8]if you're hosting a paid event.
2. **Event Configuration |** For enabling additional event features, like: guests, sessions, speakers, social media, etc.
3. **Event Status |** For testing your event [9]and requesting approval [10] from your eComm specialist.
4. **Event Settings |** For sharing your event [11] with other Cvent users.



Website & Registration | 13:39 - 23:55

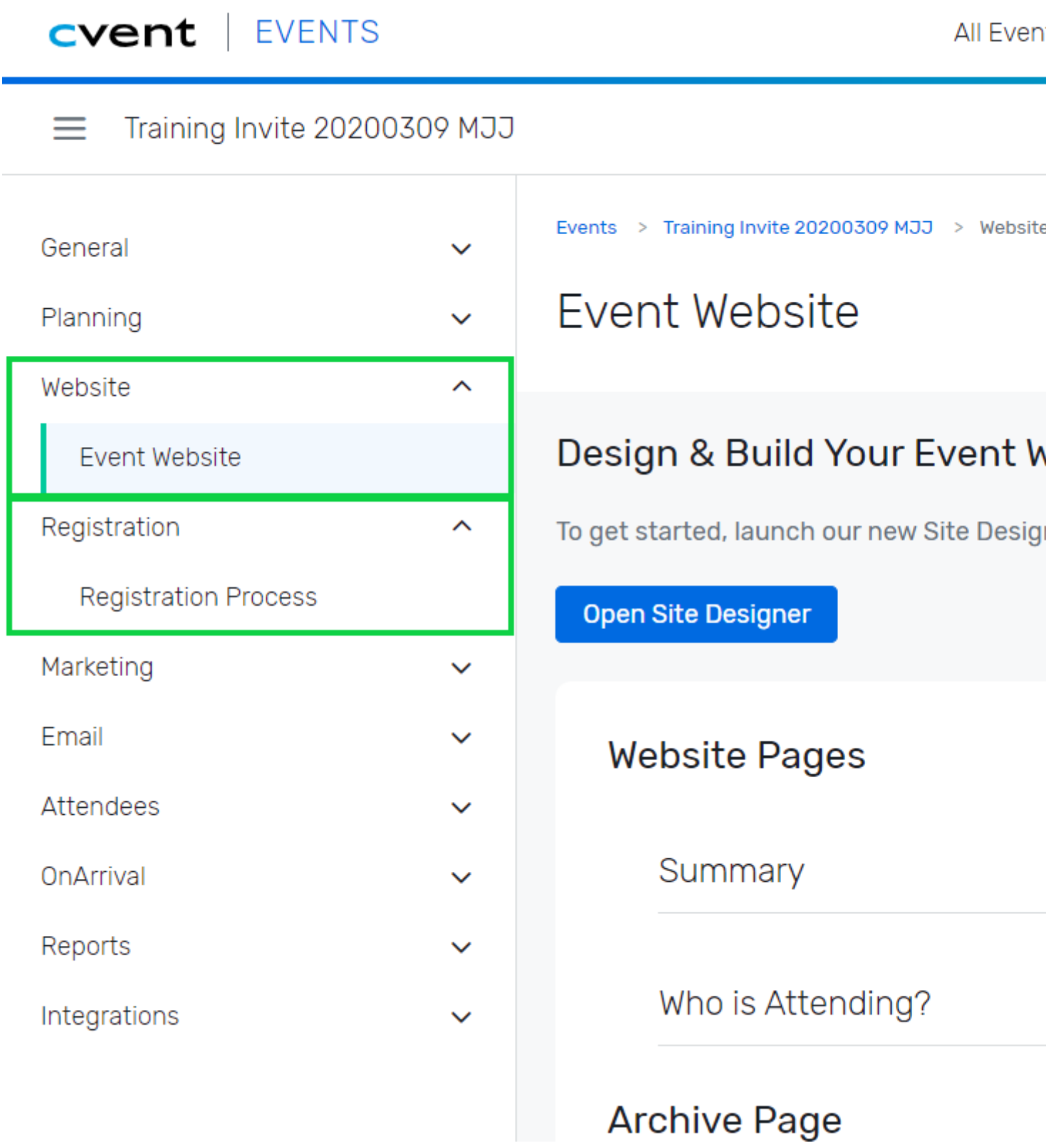
You can open the **Site Designer** to customize your website and registration process in two

ways. In the left navigation, either:

- Click **Event Website** after expanding the **Website** section.
- Click **Registration Process** after expanding the **Registration** section.

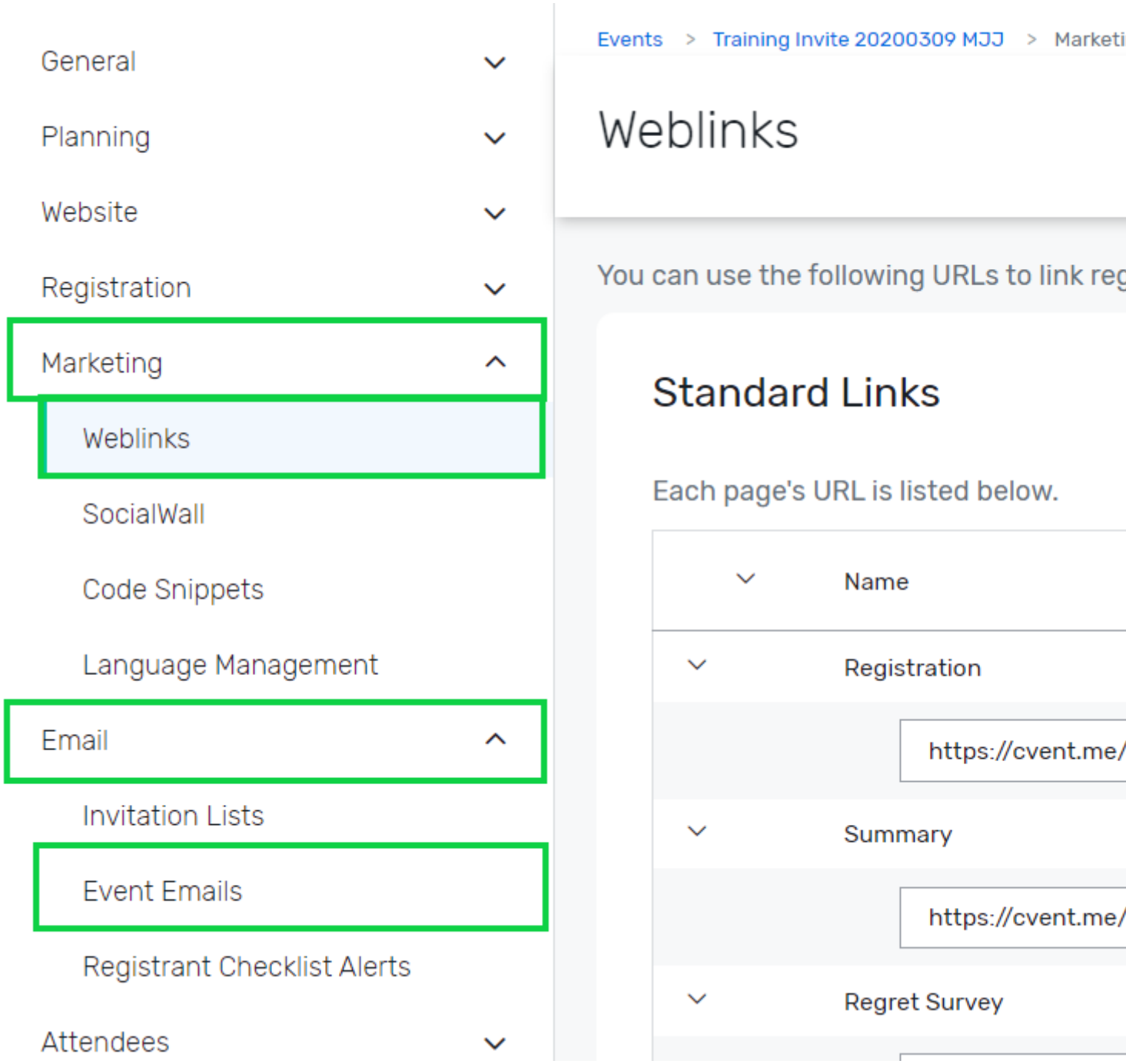
Each path will present you with a blue button to the **Open Site Designer**.

- Add Questions to Event [12]
- Add Guest Registration [13]



Marketing & Email | 23:55 - 29:48

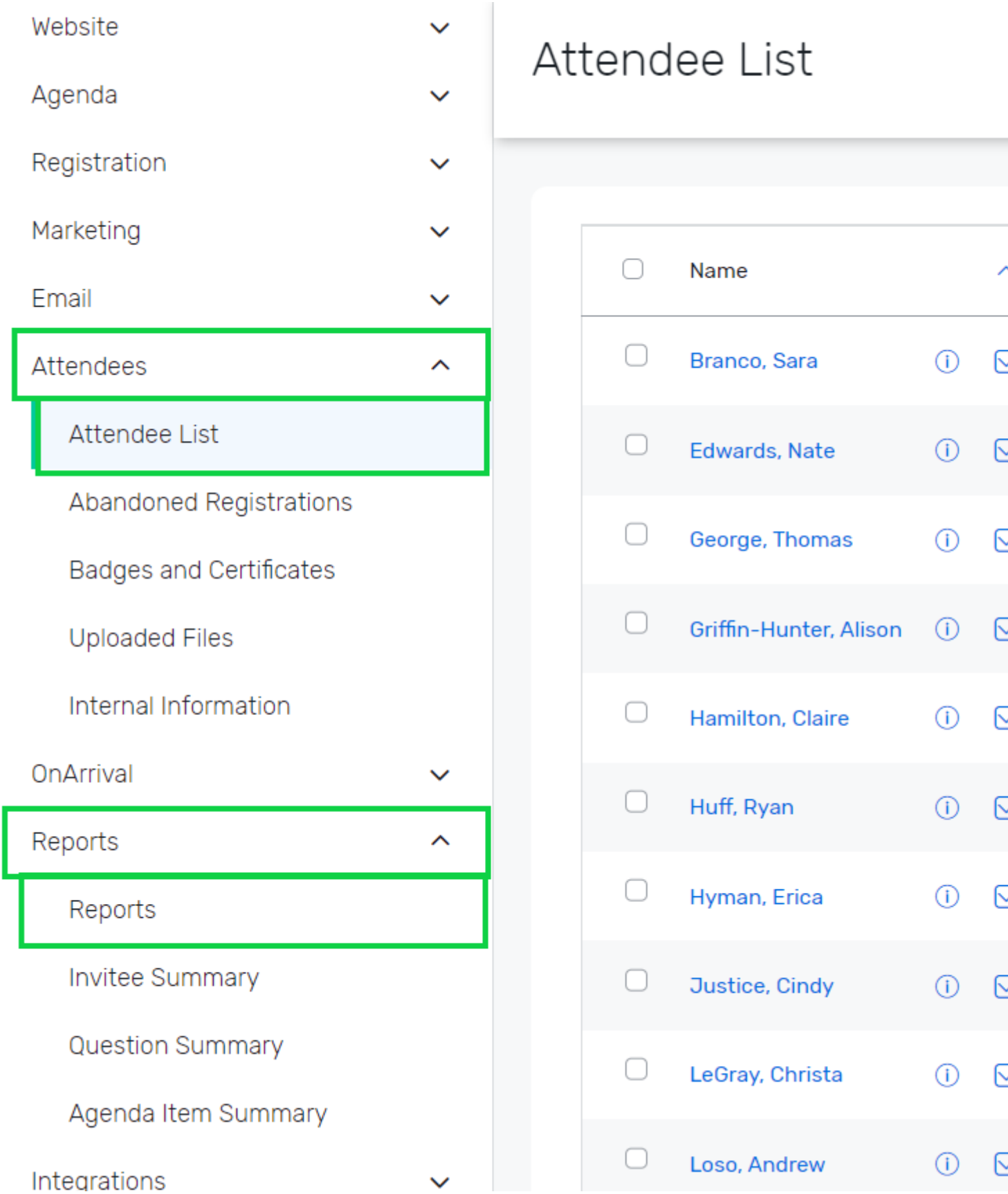
- **Weblinks** [14]**| Weblinks** can be found after expanding the **Marketing** section.
- **Emails | Event Emails** are found after expanding the **Email** section.



Attendees & Reports | 29:48 - 31:08

- **Registrant Management** [15]**| Attendee List** found under **Attendees** present a list of registrants to view, search and modify.
- **Reports** [16]**| Reports** under the **Reports** section can provide details on registrants, email engagement, financials and more. _ [16]
    - **Report Portal** [17]**|** Take it a step further by working with your eComm specialist [18]

to get Reports published to the **Portal** so others can view and export Reports in real-time, for free.



Test, Request Approval & Launch | 31:08 - 33:30

Once your event has been customized you can move into the testing phase, replicating the registrant experience. Once finalized, send a request for approval to your eComm specialist. After they review and approve your event, you will be able to launch your event.

Expand the to **General** section, then click **Event Status**

- **Testing** [9] **| The** List found under Attendees presents a list of registrants to view, search, and modify.
- **Request Approval & Launch** [10] **|** All events must be approved by an eComm specialist before you'll be able to launch them.

Test your knowledge with the quiz below.

Cvent Academy

The Cvent Academy [19] provides numerous resources to continue your learning.

Cvent Academy [20]

Related Wiki Posts

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- New User Training | Salesforce [22]
- New User Training | Intro & CAN-SPAM [23]
- Where can I complete the short verification quiz? [24]
- How can I get Cvent certified? [25]
- Does Cvent offer training and support resources? [4]
- Intermediate Cvent Flex Training [26]

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[13] https://support.cvent.com/s/communityarticle/Using-Guest-Registration
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[23] https://www.cu.edu/blog/ecomm-wiki/can-spam-new-user-training [24] https://www.cu.edu/ecomm/access-training/post-training-verification [25] https://www.cu.edu/blog/ecomm-wiki/cvent-certification [26] https://www.cu.edu/blog/ecomm-wiki/cvent-additional-training