

New User Training | Cvent ^[1]

December 2, 2021 by [Melanie Jones](#) ^[2]

Get started right away by learning to create an event website and registration process with Cvent.

- Use the training below to learn how to clone and customize a CU branded template for yourself.
 - You can also [create a new event from an existing event you have access to](#) ^[3].
- The following training will reference our [CU Branded templates](#) ^[4] that are available to clone.
- Majority of the available templates and events hosted at eComm use Cvent Flex - a more recently released *event type* that has the flexibility to be customized for a simple or complex event. Express Ticketing and Express Events are older *event types* that have limited functionality intended only for simple events. [Learn more about the differences of these event types.](#) ^[5]

- [Flex Event](#)
- [Express Ticketing](#)
- [Express Event](#)

Get Started | 0:00 - 10:40

- **Help & Support** ^[6] | 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** ^[4] | We've made six different CU Branded templates available to all users to clone. They provide a great start but can be fully customized.
- **Create Event** | The event creation process starts off 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 ^[3].

Events

View: Current Events ▾

Create View

Title			Code
Unsubscribe: eComm...			C5M
Subscribe: Employee...			GLM
Subscribe: Registrar Network Newslette...			WH
Subscribe: Budget & Fiscal News			JW
Subscribe: Benson Center for the City...			P3M

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.
 - o This also includes our Custom Contact Fields which play a role in getting money to your account [7] 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 [8] and requesting approval [9] from your eComm specialist.
4. **Event Settings** | For sharing your event [10] with other Cvent users.

cvent | EVENTS

☰ Training Invite 20200309 MJJ

Events > Training Invite 20200309

Home

Location

Office of the Presider
Rooms
Denver, Colorado

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**.

The screenshot shows the Cvent Events interface. At the top left, the Cvent logo is followed by 'EVENTS'. On the top right, there is a link for 'All Events'. Below the header, a breadcrumb trail reads 'Training Invite 20200309 MJJ'. A left-hand navigation menu is visible, with a green box highlighting the 'Website' and 'Registration' sections. The 'Website' section is expanded, showing 'Event Website' as a sub-option. The 'Registration' section is also expanded, showing 'Registration Process' as a sub-option. The main content area on the right displays the title 'Event Website' and a sub-header 'Design & Build Your Event Website'. Below this, there is a blue button labeled 'Open Site Designer'. Further down, there are sections for 'Website Pages' and 'Archive Page', each containing a link to a specific page.

cvent | EVENTS All Events

☰ Training Invite 20200309 MJJ

Events > Training Invite 20200309 MJJ > Website

Event Website

Design & Build Your Event Website

To get started, launch our new Site Designer

[Open Site Designer](#)

Website Pages

- [Summary](#)
- [Who is Attending?](#)

Archive Page

Marketing & Email | 23:55 - 29:48

- **Weblinks** [11] | **Weblinks** can be found after expanding the **Marketing** section.
- **Emails** | **Event Emails** are found after expanding the **Email** section.

A vertical navigation menu with the following items: General, Planning, Website, Registration, Marketing, Weblinks, SocialWall, Code Snippets, Language Management, Email, Invitation Lists, Event Emails, Registrant Checklist Alerts, and Attendees. The 'Marketing' and 'Email' items are highlighted with green boxes. The 'Weblinks' item is highlighted with a light blue background. The 'Event Emails' item is also highlighted with a light blue background.

The 'Weblinks' page header shows the breadcrumb: Events > Training Invite 20200309 MJJ > Marketing > Weblinks. Below the header, there is a text block: "You can use the following URLs to link reg". The main content area is titled "Standard Links" and contains the text: "Each page's URL is listed below." Below this text is a table with the following structure:

▼	Name
▼	Registration
	https://cvent.me/
▼	Summary
	https://cvent.me/
▼	Regret Survey

Attendees & Reports | 29:48 - 31:08

- **Registrant Management** ^[12] **Attendee List** found under **Attendees** present a list of registrants to view, search and modify.
- **Reports** ^[13] **Reports** under the **Reports** section can provide details on registrants, email engagement, financials and more. ^[13]
 - **Report Portal** ^[14] Take it a step further by working with your eComm specialist ^[15] to get Reports published to the **Portal** so others can view and export Reports in real-time, for free.

- Website
- Agenda
- Registration
- Marketing
- Email
- Attendees**
- Attendee List
- Abandoned Registrations
- Badges and Certificates
- Uploaded Files
- Internal Information
- OnArrival
- Reports**
- Reports
- Invitee Summary
- Question Summary
- Agenda Item Summary
- Integrations

Attendee List

<input type="checkbox"/>	Name		
<input type="checkbox"/>	Branco, Sara	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Edwards, Nate	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	George, Thomas	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Griffin-Hunter, Alison	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Hamilton, Claire	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Huff, Ryan	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Hyman, Erica	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Justice, Cindy	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	LeGray, Christa	<i>i</i>	<i>✓</i>
<input type="checkbox"/>	Loso, Andrew	<i>i</i>	<i>✓</i>

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

Test your knowledge with the quiz below.

Cvent's Training Courses

Cvent's online training [16] will teach you how to build your first event, organize sessions, promote your event, manage attendees, record payments, and run reports. This article lists all our Flex courses in the order we recommend taking them.

Cvent Flex Training [16]

- **Event Creation** | 90 min. [17]
- **Site Designer** | 14 min. [18]
- **Email Designer** | 7 min. [19]

Need a streamlined registration but still want invitees to use tickets, free or paid? Try Express Ticketing Registration. One step up from Express Registration, this type of event lets you offer different registration items and even charge for them.

1 | Create

- Login to Cvent
- Select the green **Create** button on the top-right
- Keep the default radio button selected: **Create using a template**
- Select the **ellipsis** next to the template box

Step 1: Enter the Event's Details

Event Creation Wizard

Creation Method

Create: Using an event

Using an exist



Using an event template

* Template:

Choose how to handle the selected template's emails.

Handling Method: Set scheduled

Automatically

Make ALL ema

- A pop-up will appear with a variety of CU branded templates [4] to **select**. **Express Ticketing** templates provides a streamlined registration but with tickets, free or paid. It's one step up from Express Registration, allowing different registration items and that can be charged for.

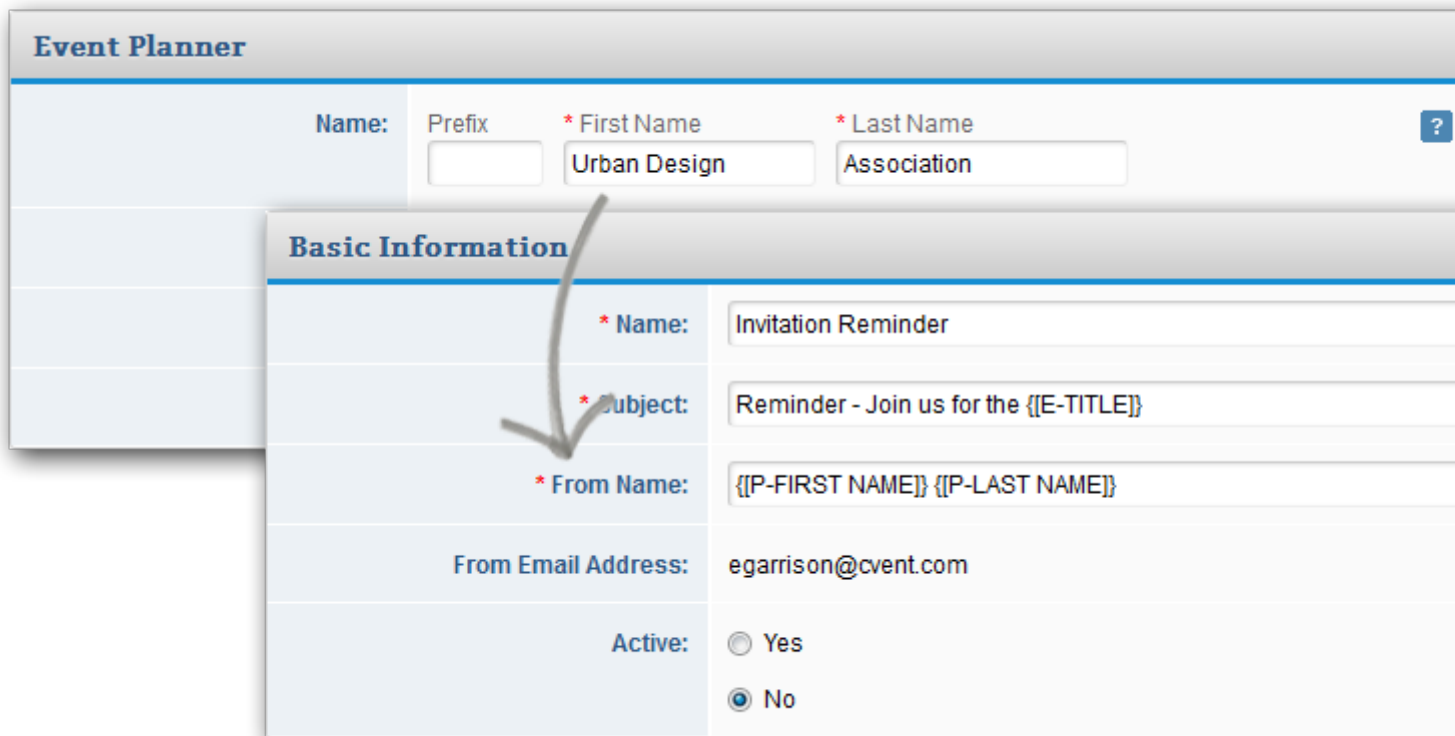
When & Where

- In the **When** section, set the time zone to match the venue's. Select the dates and times. The **Registration Deadline** is the last day invitees will be able to register.
- Add your event location to the **Where** section.

NOTE: Your event will close automatically when it reaches capacity or the Registration Deadline passes.

Event Planner

- In the **Event Planner** section, enter the planner's first and last name. This will appear by default in the From Name field of event emails by way of data tags.



The screenshot shows the 'Event Planner' interface. At the top, there is a 'Name' section with three input fields: 'Prefix' (empty), '* First Name' (containing 'Urban Design'), and '* Last Name' (containing 'Association'). Below this is the 'Basic Information' section, which is highlighted with a grey arrow pointing to the '* From Name' field. The 'Basic Information' section contains the following fields:

* Name:	Invitation Reminder
* Subject:	Reminder - Join us for the {{[E-TITLE]}}
* From Name:	{{[P-FIRST NAME]}} {{[P-LAST NAME]}}
From Email Address:	egarrison@cvent.com
Active:	<input type="radio"/> Yes <input checked="" type="radio"/> No

NOTE: You can change anything you've created during the wizard later. This is just the start.

Advanced Settings

- In the **Advanced Settings** section, leave the default radio button so **Registration is open to: Anyone (Public)**

Custom Event Fields




- **Your Campus:** Based on where you are employed, not where you are hosting an event.
- Select a **Payment Path:**
 - CU Cvent if collecting payment
 - Free Event if not charging for event registration
 - CU Foundation Cvent is used only for fundraising specific events and require authorization.
- **SpeedType:** If charging for your event, your department's speedtype must be added to the Cvent.
 - For free events, No Speed Type Required
- **Account Code:** If charging for your event, your account code must be added to the

Cvent.

- For free events, N/A
- **Allocation Fund #** is for fundraising specific events.
 - For non-fundraising events, N/A

Registration Items

- **Add a free ticket.** Scroll down to the **Registration Items** section, and click **Add Free Ticket**.
 - Name the ticket, then set a capacity.
 - If limiting how many tickets an invitee can select, enter a Max Quantity in the field.
 - You can also limit when this ticket is available. Simply enter an "Automatically closes" date. If you leave these fields blank, the tickets will become available when you launch the event and close with the registration deadline.
- **Or add a ticket with a fee.** Scroll down to the **Registration Items** section, and click **Add Paid Ticket**.
 - Name the ticket, then establish the capacity. Enter the price, then determine if you want to add a general ledger code.
 - If limiting how many tickets an invitee can purchase, enter a Max Quantity in the field. Enter a refund amount if you plan to refund cancellations [20].
 - You can also limit when this ticket is available. Simply enter an automatically opens and automatically closes date. If you leave these fields blank, the tickets will become available when you launch the event and close with the registration deadline.

* Name	Capacity	* Price	General Ledger Code
Early Entry	50	25.00	Registration T  ...
Code			Open for registration
Early Entry			<input checked="" type="checkbox"/>
Max Quantity			Refund
2			25.00
Description			Automatically opens on
			11/01/2017 
2500 characters remaining			Automatically closes on
			04/30/2018 

NOTE: Refunds at CU must follow a few guidelines [20].

Want to create a discount for registrants? Navigate to the **Advanced** tab.

Payment Options

- In the **Payment Options** section, check which payment methods will be available. If collecting credit cards, select a merchant account from the dropdown that appears.
 - CU Cvent is for paid events
 - CU Foundation Event is for fundraising specific events only
- To add a **service fee**, switch **Charge a service fee for certain payment methods to Yes**. Check which payment methods it will apply to. Determine whether the fee will be calculated by amount or percentage then enter the number.

Learn more about fees, such as setting up a discount, taxes or service charges. ^[21]

Save Event

- Click **Finish**. Your event is being saved and might take a minute.

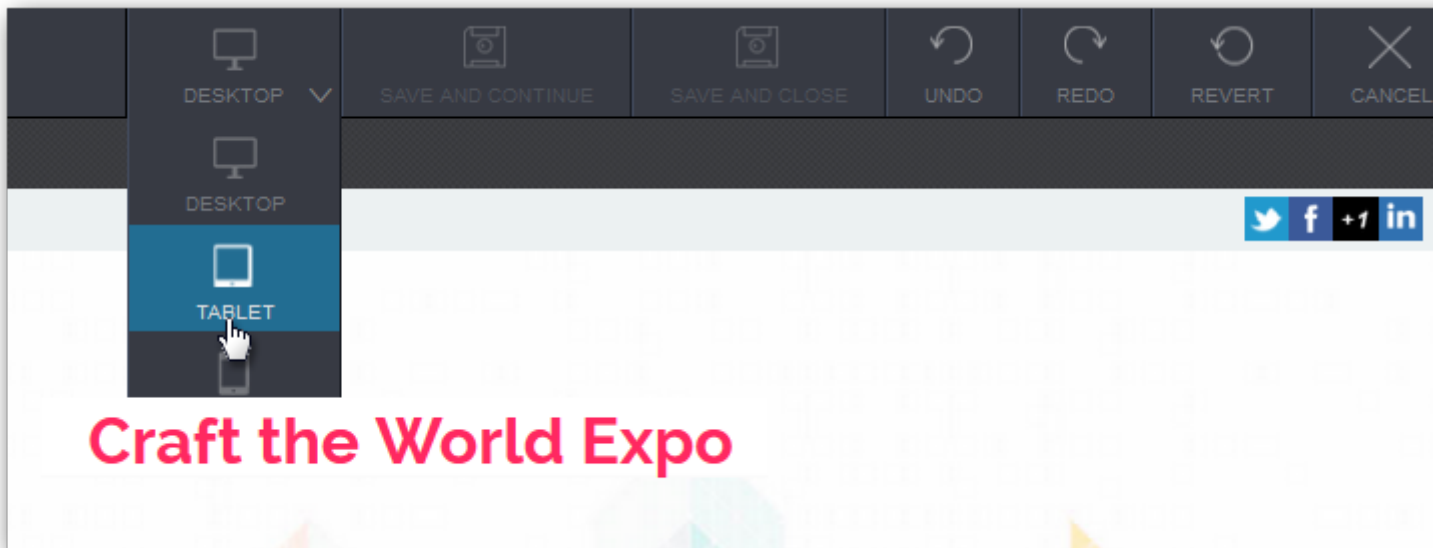
2 | Customize

Website & Registration Design

- **Customize the registration process.** With your event open, click the **Website & Registration** tab. Click **Customize** next to Registration.
 - Click and drag fields, questions, widgets, and content from the Design Tools sidebar onto the page. Play around!
 - When you hover over something you just added, options may appear to edit text, adjust settings, or remove the element entirely.

NOTE: Contact info is automatically collected once per order, but you can always decide to collect it for each ticket purchased.

- To design the fonts and colors, click **Launch Theme Designer**.
- When adding a background image, click **Edit Section** in the top right corner of the section you want to customize. Use the Background Options to determine how the image will be positioned, then establish the image's width and height compared to the section's size. Depending on which option you select, the image will take up that percentage of the section, such as an image with a 50% width and height will take up half of the section. Then determine how the background will repeat.
- Preview your work, viewing the desktop, tablet, and mobile sized versions.



Communication Design & Weblink

- **Tailor your emails** by navigating to the neighboring tab, **Promotion & Communication**
 - Select an email. The Details tab opens by default. Click the neighboring tab, **Content**, then **Edit**.
 - Preview your work, viewing the Canvas, Desktop, and Mobile sized versions with the **View** dropdown in the top-right.

NOTE: You'll find your Weblink in Promotions & Communications. Embed this link in your Marketing Cloud invitation to remain CAN-SPAM compliant.

NOTE: To test your event, click Perform Test on the Overview tab. Once you're happy with how it looks, send your event to your eComm specialist for approval. Once approved, a Launch Event button on the Overview tab will appear for you to select. There is also a Launch button located at the bottom of the other tabs.

Advanced Tab

- By design, templates are designed to not appear in search engines. To change this setting, navigate to the **Advanced** tab and set the Search Engine setting **on**.
- If you wish to provide discounts, you can configure them in the Advanced tab.

3 | Test & Launch

Test

- Testing the event ^[8] is a crucial step to having a successful event. Plan enough time for quality testing by numerous individuals.
 - Use test credit card numbers ^[22] to test your paid event.
- Test with eComm's event checklist ^[23] to make sure you don't miss any items (like

broken links, the mobile experience, or accessibility standards).

- Cvent also has a great resource on what to check before launching your event [24].

Approval & Launch

- Once you're happy with how it looks and functions, **send your event to your eComm specialist for approval** [9]. Once approved, you'll have the option to launch your event.
- Once launched [9], your event Weblink found in the Promotions & Communications section will be functional.

4 | Manage

Invitee Management

- You can modify an existing registration [25] while your event is in any status, changing contact information, answers to questions, selected items, and payment information, or you can get your registrants do that work for you [26].

Reports

- Cvent makes reporting on your event easy [13] with numerous report templates that can be customized and saved.

|

Have a simple, free event that needs a simple set up? Then Express Events is the answer. If you need advanced features (like sessions or allowing a primary guest to register additional guests), you'll need to use Flex.

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* Template:

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Handling Method: Set scheduled

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- A pop-up will appear with a variety of CU branded templates ^[4] to select. **Express Events** are great when your event needs a simple head count without charging for the event.

1.1 | When & Where

- In the **When** section, set the time zone to match the venue's. Select the dates and times. The Registration Deadline is the last day invitees will be able to register.
- Add your event location to the **Where** section.

NOTE: Your event will close automatically when it reaches capacity or the Registration

Deadline passes.

1.2 | Event Planner

- In the **Event Planner** section, enter the planner's first and last name. This will appear by default in the From Name field of event emails by way of data tags.

The screenshot shows the 'Event Planner' interface. At the top, there are input fields for 'Name: Prefix', '* First Name' (containing 'Urban Design'), and '* Last Name' (containing 'Association'). Below this is a 'Basic Information' section with the following fields:

- * Name: Invitation Reminder
- * Subject: Reminder - Join us for the {{E-TITLE}}
- * From Name: {{P-FIRST NAME}} {{P-LAST NAME}}
- From Email Address: egarrison@cvent.com
- Active: Yes, No

NOTE: You can change anything you've created during the wizard later. This is just the start.

1.3 | Advanced Settings

- In **Advanced Settings**, leave the default radio button so **Registration is open to: Anyone (Public)**

1.4 | Custom Event Fields

- **Your Campus:** Select based on where you are employed, not where you are hosting an event.
- Leave the **Payment Path: Free Event**
- Leave the **SpeedType: No Speed Type Required**
- Leave the **Account Code: N/A**
- Leave the **Allocation Fund #: N/A**

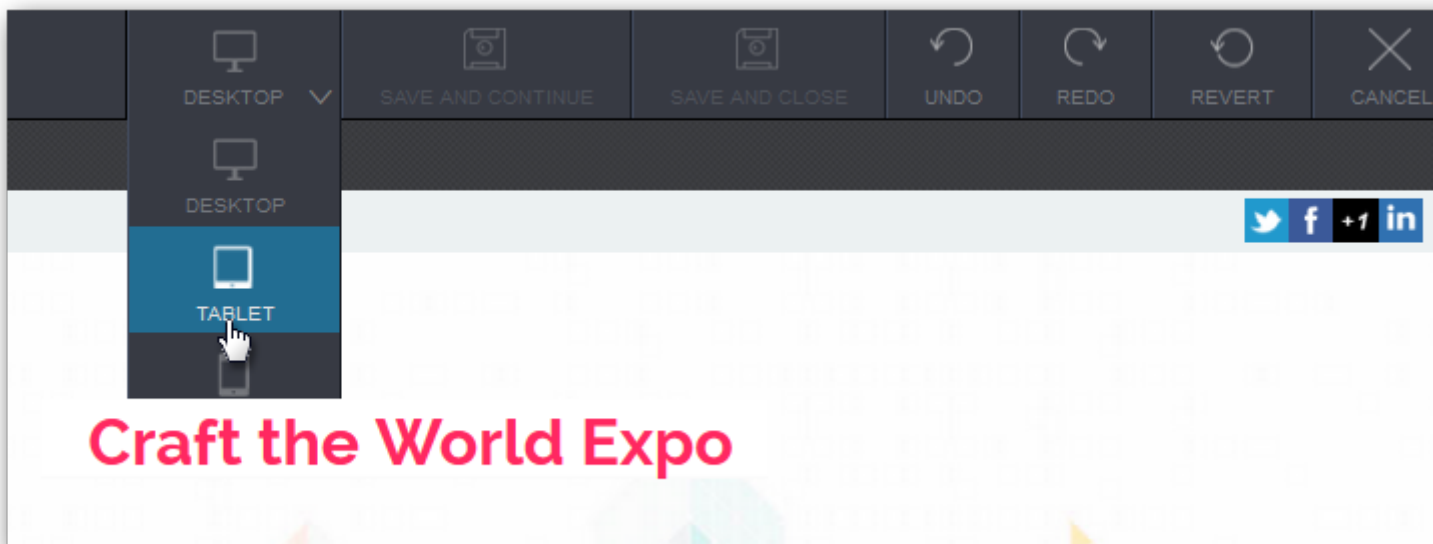
1.5 | Create Event

- Click **Finish** at the bottom to create your event.

2 | Customize

2.1 | Website & Registration Design

- **Customize your website and registration.** With your event open, click the tab, **Website & Registration**. Click **Customize** next to the page you want to create.
- When adding a background image, click **Edit Section** in the top right corner of the section you want to customize. Use the Background Options to determine how the image will be positioned, then establish the image's width and height compared to the section's size. Depending on which option you select, the image will take up that percentage of the section, such as an image with a 50% width and height will take up half of the section. Then determine how the background will repeat.
- When adding a background image, we **suggest starting out with a 1200 x 700px image**. But don't just take our word for it! Preview your work, viewing the desktop, tablet, and mobile sized versions.
 - Also be aware that any text included in the image may become distorted as the screen size changes, so it's safer to add the text separate from the image.



2.2 | Email Design & Weblink

- **Tailor your emails** by navigating to the neighboring tab, **Promotion & Communication**.
 - Select an email. The Details tab opens by default. Click the neighboring tab, **Content**, then **Edit**.
 - Preview your work, viewing the Canvas, Desktop, and Mobile sized versions with the **View** dropdown in the top-right.

NOTE: You'll find your event URL in Promotions & Communications. Embed this link in your Marketing Cloud invitation to remain CAN-SPAM compliant.

2.3 | Advanced Tab

By design, **templates are designed to not appear in search engines**. To change this

setting, navigate to the **Advanced** tab and set the **Search Engine setting on**.

3 | Test & Launch

3.1 | Test

- Testing the event [8] is a crucial step to having a successful event. Plan enough time for quality testing by numerous individuals.
 - Use test credit card numbers [22] to test your paid event.
- Test with eComm's event checklist [23] to make sure you don't miss any items (like broken links, the mobile experience, or accessibility standards).
- Cvent also has a great resource on what to check before launching your event [24].

3.2 | Approval & Launch

- Once you're happy with how it looks and functions, **send your event to your eComm specialist for approval** [9]. Once approved, you'll have the option to launch your event.
- Once launched [9], your event Weblink found in the Promotions & Communications section will be functional.

4 | Manage

4.1 | Invitee Management

- You can modify an existing registration [27] while your event is in any status, changing contact information, answers to questions, selected items, and payment information, or you can get your registrants do that work for you [28].

4.2 | Reports

- Cvent makes reporting on your event easy [13] with numerous report templates that can be customized and saved.



Related Wiki Posts

- [New User Training | Marketing Cloud](#) [29]
- [New User Training | Salesforce](#) [30]
- [New User Training | Intro & CAN-SPAM](#) [31]
- [Where can I complete the short verification quiz?](#) [32]
- [How can I get Cvent certified?](#) [33]
- [Does Cvent offer training and support resources?](#) [6]
- [Intermediate Cvent Flex Training](#) [34]

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- [3] <https://www.cu.edu/blog/ecommerce/wiki/cvent-clone-existing-event-or-cu-branded-template>
- [4] <https://www.cu.edu/ecommerce/guidelines/ecommerce-event-templates>
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- [12] <https://support.cvent.com/apex/CommunityArticle?id=000071993>
- [13] <https://www.cu.edu/blog/ecommerce/wiki/cvent-reporting>
- [14] <https://www.cu.edu/blog/ecommerce/wiki/cvent-portal>
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- [20] <https://www.cu.edu/blog/ecommerce/wiki/cvent-how-refund>
- [21] <http://support.cvent.com/apex/CommunityArticle?id=000011794>
- [22] https://cventhelp.force.com/apex/CommunityArticle?id=000009960&Lang=en_US
- [23] <https://www.cu.edu/blog/ecommerce/wiki/testing-checklists>
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- [30] <https://www.cu.edu/blog/ecommerce/wiki/new-user-training-salesforce>
- [31] <https://www.cu.edu/blog/ecommerce/wiki/new-user-training-intro>
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- [33] <https://www.cu.edu/blog/ecommerce/wiki/cvent-certification>
- [34] <https://www.cu.edu/blog/ecommerce/wiki/cvent-flex-additional-training>