

Send Cvent Guests to Salesforce ^[1]

March 10, 2019 by [Melanie Jones](#) ^[2]

When you launch a Cvent event (after approval), a Salesforce Campaign is automatically created. Once people (Primary Registrants) start registering for your event, they will also automatically be added to the associated Salesforce Campaign as a Campaign Member.

Interested in capturing data in Salesforce for the Guests of a Primary Registrant? You'll need to add new guests to the Address Book and require Guest's Email Address.

- Navigate to your event
- Expand **Website** in the left navigation, then select **Event Website**
- **Open the Site Designer** with the blue button

Home

General

Website

Event Website

Agenda

Registration

Marketing

Email

Events > Test Mel Training > We

Event Website

Design & Build You

To get started, launch our n

Open Site Designer

Website Pages

Add new guests to the Address Book

Add new guests to the: Address Book

- Navigate to the **Personal Information** page in the top-left corner
- Click on the **Guest Registration widget**.
 - *You may need to add this widget. If unavailable, ensure **Guests** are enabled in **Event Details >> Event Configuration***
- Scroll down on the panel that displays on the right until you get to **Address Book Settings**

Your Last Name

* Your Email Address

Guest Registration

John Doe

john.doe@email.com

[Edit](#) [Remove](#)

Add a Guest

* Do you or your guest require accommodations related to accessibility?

- ☐ Yes
- ☐ No

Acc
sho
to [C
PHO

LEA
[http](#)
[acce](#)

Cancel

- Further details will display in the right-panel.
- Enable the button for **Add new guests to the Address Book** so it's green.

Your Last Name

* Your Email Address

Guest Registration

John Doe

john.doe@email.com

[Edit](#) [Remove](#)

Add a Guest

* Do you or your guest require

Accommodation

FYI

If this is NOT checked, guests who provide an Email Address and are already in the Cvent Address Book will be captured in Salesforce.

Make Guest Email Required

- While still in **Site Designer**, navigate to the **Guest Information page** by selecting the dropdown in the top left and scrolling.

REGISTRATION PAGE

Personal Information ▲

Personal Information

Registration Summary

+

Post Registration Pages

Confirmation

+

Other Pages

Cancellation Form

Decline Form

Guest Information ⚙

Header and Footer ^

Default Header and Footer

+

Archive Page ^

Archived Event

Your Last Name

* Your Email Address

Guest Registration

John Doe

john.doe@email.com

[Edit](#) [Remove](#)

Add a Guest

* Do you or your guest require accommodations related to accessibility?

☐ Yes

☐ No

- Select the **Email Address widget** on the **Guest Information** page.
 - *You may need to add the Email Address widget to this page.*
- The panel on the right provides a **Display As option**. Set it to **Required**.
- Don't forget to Save and Publish as you go.

Add a Guest

Enter your guest's information

* **First Name**

* **Last Name**

* **Email Address**

Cancel

If a guest's email address is not provided, that guest and his or her participation information will NOT be sent to Salesforce - and that's okay. It's completely your call if you want to collect guest email addresses or not. Guest information will always be available in Cvent, should you need it.

EMAIL: OPTIONAL

Most Cvent forms - like the CU Branded template - do not require an email address for guests to make registration easier for the primary attendee.

Related Content

- [How does the Cvent-Salesforce integration work?](#) [3]

Display Title:

Send Cvent Guests to Salesforce

Send email when Published:

No

Source URL:<https://www.cu.edu/blog/ecommerce/wiki/send-cvent-guests-salesforce>

Links

[1] <https://www.cu.edu/blog/ecommerce/wiki/send-cvent-guests-salesforce> [2] <https://www.cu.edu/blog/ecommerce/wiki/author/39> [3] <https://www.cu.edu/blog/ecommerce/wiki/ecommerce-upgrade-automatic-salesforce-integration>