

## **Send Cvent Guests to Salesforce** <sup>[1]</sup>

March 10, 2019 by [Melanie Jones](#) <sup>[2]</sup>

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

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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

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[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

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## Guest Registration

John Doe

john.doe@email.com

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

**Add a Guest**

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\* 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

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**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>