

Send Cvent Guests to Salesforce [1]

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

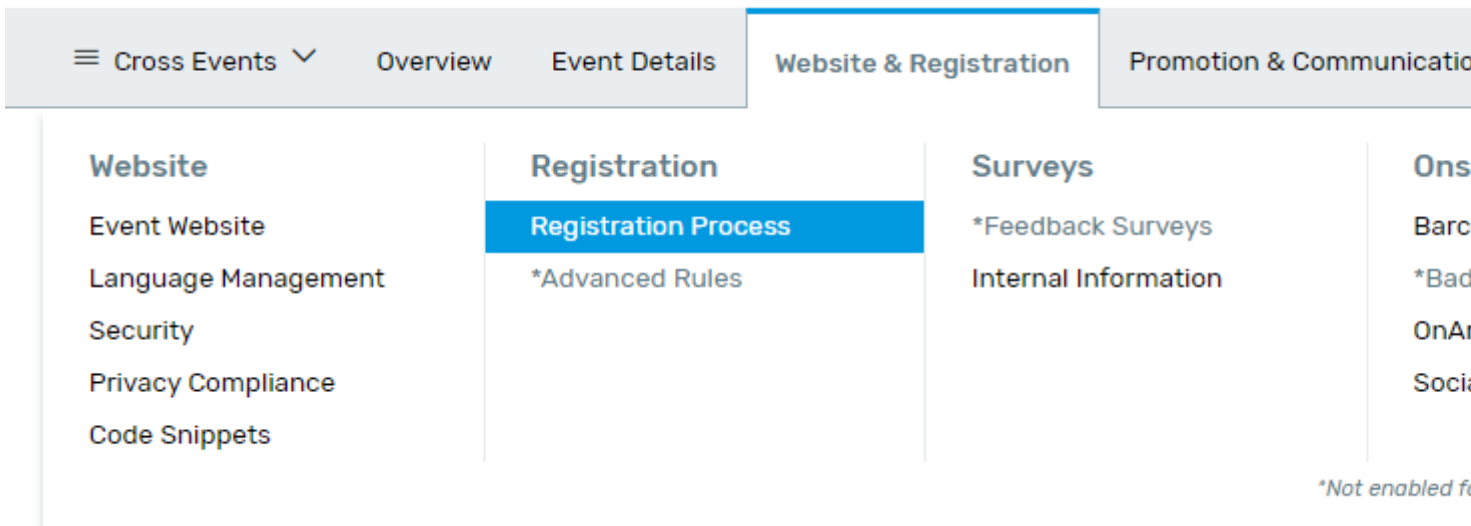
NOT AVAILBLE IN EXPRESS Guests are not a feature available in Cvent Express. If you need the option for Primary Registrants to register additional guests, use Flex (preferred) or Standard.

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 **1)** send Guests to the Address Book and **2)** require Guest's Email Address.

- Flex
- Standard or Classic

- Navigate to your event
- Hover **Website & Registration**
- Click **Registration Process**, found under Registration (2nd column)



- Click on the green **Open Site Designer** button

Registration Process

Design & Build Your Registration Process

To get started, launch our new Site Designer, or start customizing one of the pages below.

Registration Process Pages

Personal Information

Add new guests to the: Address Book

- The **Personal Information** page should open by default (confirm in 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

Personal Information > Build > Guest Registration

- 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.

Print 1-Pager ^[3]

- Navigate to your Standard event with guests enabled
- Hover **Website & Registration**
- Click **Registration Settings**, found under **Registration** (2nd column)
- Click on the **Guests** tab

Add new guests to the: Address Book

- Check the box for **Add new guests to the: Address Book**

Registration Settings

Basic Settings

Identification & Security

Contact Fields

Guests

Confirmation

Advanced Settings

Invitees must provide personal information about their guests during initial registration:

Yes

No

Note: Personal information about guests must always be provided.

Invitees can select guests from their related contacts:

Yes No

Add new guests to the:

Address Book

Invitee's related contacts

Following contact group

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

- Under Guest Fields, make **Email: Required** using the dropdowns in the Display Settings column

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.

Registration Settings

Basic Settings

Identification & Security

Contact Fields

Guests

Confirmation

Guest Fields

Field	Label	Display Setting
First Name	First Name	Required
Last Name	Last Name	Required
Email	Email Address	Required

[Add Field...](#)

EMAIL: OPTIONAL

Most Cvent forms - like the CU Branded template [4] - do not require an email address for guests to make registration easier for the primary attendee.

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Related Content

- [How does the Cvent-Salesforce integration work?](#) [6]

Display Title:

Send Cvent Guests to Salesforce

Send email when Published:

No

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

Links

[1] <https://www.cu.edu/blog/ecomm-wiki/send-cvent-guests-salesforce>

[2] <https://www.cu.edu/blog/ecomm-wiki/author/39>

[3]

<https://docs.google.com/document/d/1MFM9jCdayxBSaTYzRWVjG39RImpx3Jz9ezoA01OfU2s/edit?usp=sharing>

[4] <https://www.cu.edu/blog/ecommerce-wiki/cvent-standard-cu-branded-template>

[5] [https://docs.google.com/document/d/1Sxl6oTGncj7DID_G-](https://docs.google.com/document/d/1Sxl6oTGncj7DID_G-dxokorVZVm2TFAB8RFOhgryXcU/edit?usp=sharing)

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[6] <https://www.cu.edu/blog/ecommerce-wiki/ecommerce-upgrade-automatic-salesforce-integration>