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
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**
Guest Registration

John Doe
john.doe@email.com

* Do you or your guest require accommodations related to accessibility?
  - Yes
  - No
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.
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.
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

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