CVENT USER MANUAL

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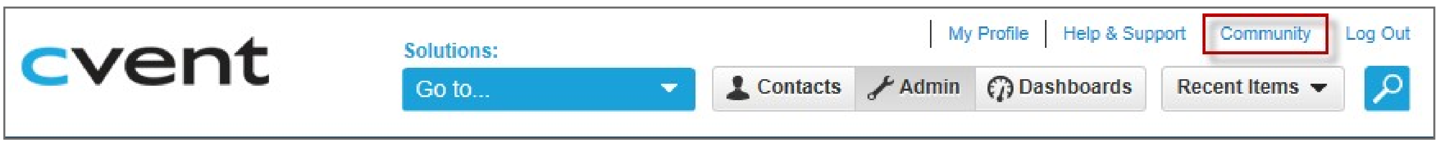
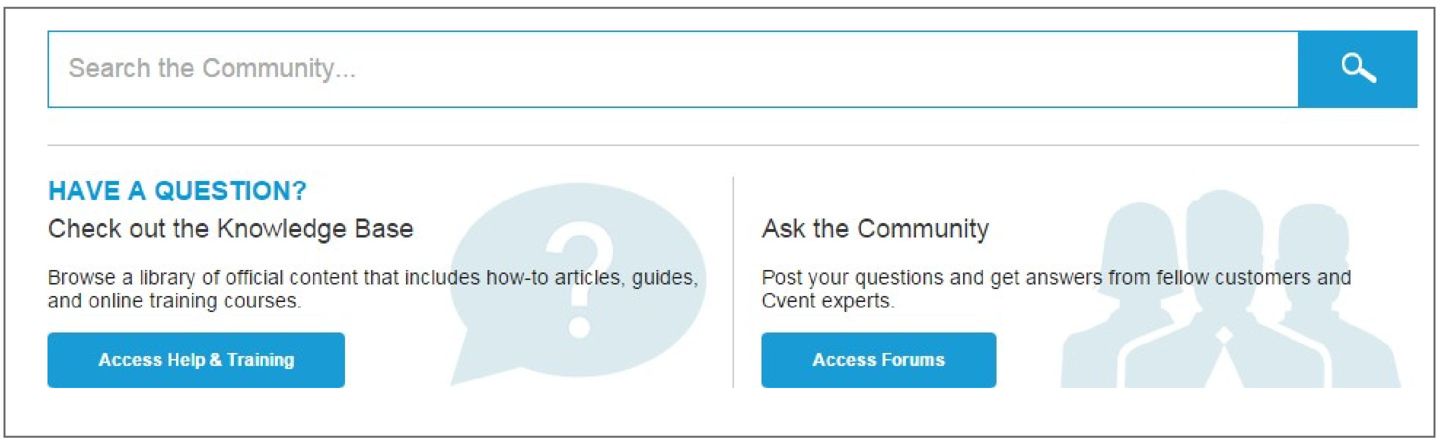
CVENT SUPPORT RESOURCES

Online Resources

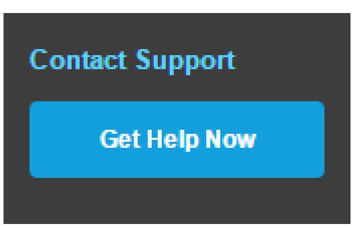
Cvent has excellent customer support and online help articles. You can access the community by clicking the Community link at the top of any page in Cvent.





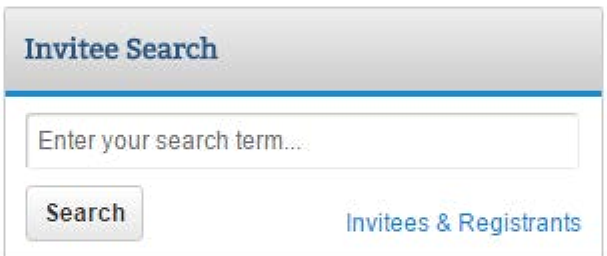
Customer Care

Customer Care is available 24/7 to answer your questions. You can reach them by chat or by phone at any time by clicking the blue Get Help Now button at the bottom of the Community page.



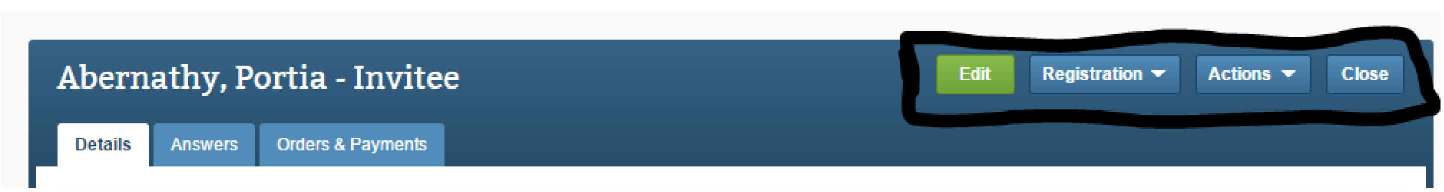
1. **How to search for an attendee.**

    a. When clicking into an event, you can search for an attendee on the "Overview" page on the "Invitee Search" box on the right. To see a more detailed list, click the link "Invitees & Registrants" link on the lower right corner of the box.
    b. You can see a preview of the attendee record by hovering your mouse over the next to the Attendee's name. Or you can click into the attendee record by clicking their name.



<u>MODIFYING ATTENDEE REGISTRATIONS</u>

To make changes to a registration, you will need to select one of the options from the following tool bar on the top right hand corner of the attendee record.



1. How to Edit Contact Information or Custom Questions:

c. Select the "*Actions*" drop-down.
d. Select option to "*Edit Contact Information*".
e. Make changes and hit "*Save*".

2. **How to Edit Registration Packages, Sessions, or Ticket options:**

    a. Select "*Registration*" drop-down.
    b. Select "*Modify Registration*"

c. Walk through registration, clicking "*Next*" on bottom right of each page. Be sure to walk through each page and select "*Finish*" at the end.

3. How to make Substitutions:

a. Select "*Registration*" drop-down.
b. Select "*Substitute Registrant*".
c. Enter name and email of new attendee and select "*Submit*" on top right corner.

4. How to switch Registration Type:

a. Select "*Registration*" drop-down.
b. Select "*Switch Registration Type*".

5. How to add an internal note to an attendee registration:

a. Select green "*Edit*" button.
b. Scroll to bottom and add in "*Internal Note*" box.

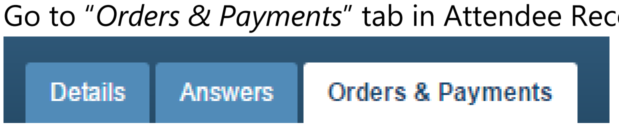
SENDING EMAILS

1. How to resend Confirmation Email:

a. Select "*Actions*" drop-down.
b. Select "*Resend Confirmation Email*".

2. How to send a Receipt:

a. Go to "*Orders & Payments*" tab in Attendee Record.



b. Select "*Actions*" Drop-down.
c. Select "*Email this Page*".

PAYMENTS/REFUNDS

1. How to make a Credit Card Payment:

a. Select "*Actions*" drop-down.
b. Select "*Submit Payment*".
c. Enter Payment amount.

d. Select "*Online – Charge a credit card now*".
e. You will have the option to select a new card or charge the card on file.
f. (If new) Fill out the CC information and hit "Submit" in top right corner.

2. How to make an Offline Payment (ex. Check, Wire Transfer, Cash, etc.):

a. Select "*Actions*" drop-down.
b. Select "*Submit Payment*".
c. Enter Payment amount.
d. Select "*Offline – Record a payment that has been (or will be) made through an offline payment method*".
e. Select Payment Method.
f. If making check payment, be sure to enter check number under "*Reference Number*" box.

3. How to apply a discount code:

a. Select dropdown next to Admission Item (highlighted below)

Order Details

Item	Registrant	Fee	Qty	Amount Ordered (USD)	Amount Paid (USD)	Amount Due (USD)
Order Number: JFNZ44GJ6WP (Submitted on 4/25/2017)					Invoice Number: 042017-0410-0560	
Full Conference Admission	Custer, Annabel	$50.00	1	$50.00	$1.00	$49.00
Total				$50.00	$1.00	$49.00

b. Select "*Adjust the Order Amount*"
c. Enter Discount Code and hit "*Save*"
d. To see which discount codes are available, select "…" to the side of the box.

4. How to view discount codes and code usage:

a. Select "*Event Details*" on top blue taskbar.
b. On fourth column, select "*Discounts*".
c. Every discount will appear on this page, including group discounts, and the details of each.
d. Please note, all discount codes will be applied on the Checkout page of the registration form.

5. **How to add discount codes:**

a. Begin by selecting your event. Hover over Event Details and, under Pricing, click **Discounts**. Click **Create Discount**.
b. Give the discount a name you'll remember. This will not appear to invitees, but it is how you'll distinguish the code in reports. Ensure **Yes** is selected next to Active. If the discount cannot be used with additional discounts, switch Stackable to **No**. Enter the dates the code will be valid.

c. What's in the Discount Code fields will be what eligible invitees need to enter to receive the discount. *Each code must be unique*. You cannot have duplicates.

   Choose how the invitee will be discounted. Your options include:

   i. **Subtract an amount**

   ii. **Subtract a percentage**

   iii. **Charge a fixed price** makes the amount entered the new total, and it cannot be stacked.

   Select if the discount code applies to invitees only, guests only, or to both the invitees and their guests. Then establish if the discount will be applied automatically.

d. Scroll down to the Registration Settings section. If the discount code will only apply to specific products, make sure "Each of the following agenda items" is selected. Check the box next to each item's name to allow this discount to change its price.

   If the code should apply to the overall price of an order, just select "The final total."
e. Click "Save"

6. How to make a refund:

a. Select "*Actions*" dropdown.
b. Select "*Submit Refund*"
c. Enter Refund amount.
d. Select if you would like for the payment to be Online or Offline.
e. Submit.

7. How to view a refund policy:

a. Select "*Website & Registration*" on the top blue taskbar.
b. On the second column, select "*Registration Settings*".
c. On the first tab, "*Basic Settings*", scroll down to the bottom to find the "*Terms & Conditions*" box. Here you can find the refund policy for an event.

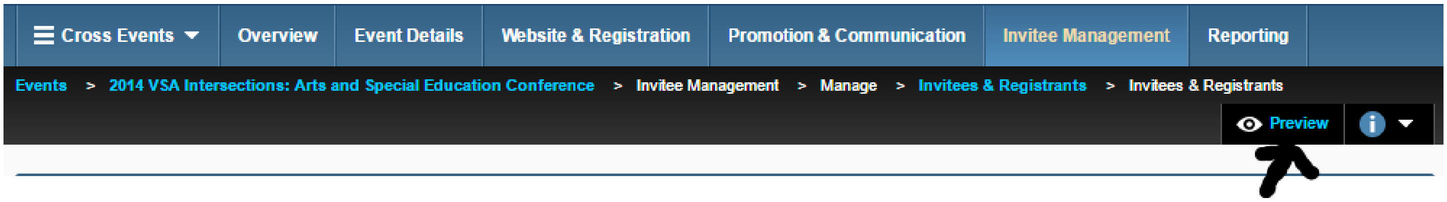
MISCELLANEOUS

1. How to create a new registration:

a. On blue taskbar, select, "*Invitee Management*".
b. On the second column, select "*Register Invitee*"
c. Complete registration form.

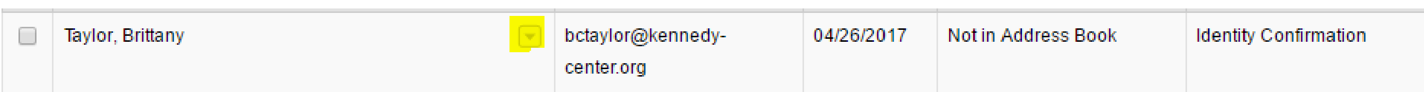
2. **How to preview Website / Registration page:**

   a. On top right hand corner, select "*Preview*". Please note, this will take you to the Website. To preview the registration site, you will need to select the "*Register*" button on the bottom right hand corner of the website.



3. **How to register an abandoned registration:**

   a. Select "*Invitee Management*" on top blue taskbar.
   b. On first column, select "*Abandoned Registrations*"
   c. Select the dropdown arrow (highlighted below) and select "*Register*".



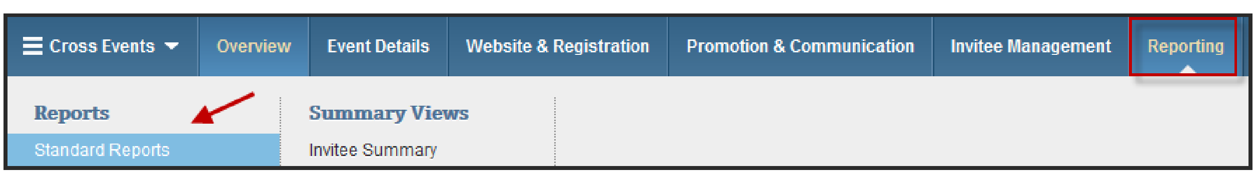
4. **How to find registration link:**

   a. Select "*Promotion & Communication*" on top blue taskbar.
   b. On first column, select "*Weblinks*".

REPORTING

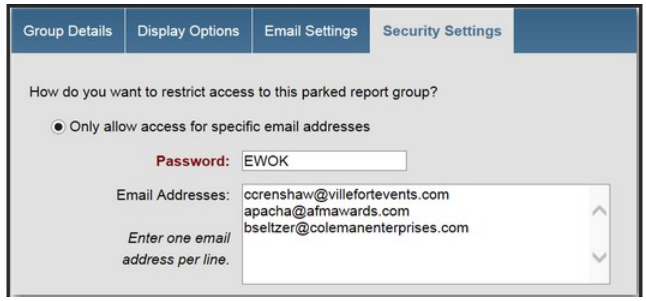
Standard Reports

1. You can access them under Reporting> Reports> Standard Reports.



2. Cvent provides with a list of Standard Reports categorized into headers such as Registrant Status, Registration, General Event, Email Reports etc.
3. Apart from these standard reports, you can also create custom reports to customize the data youcan get in a report.
4. To know what data would a report return, click on the "+" icon to the left of the report and it would give you a description for that report.

5. To run a report, click on the name of the report. You can define a date range for which you want to run the report along with the fields (columns) you would want to see. To narrow down your results, apply Advanced Filters at the bottom of the report.
6. Click on Run Report. The report will be generated which you can further export into various formats like PDF, Excel etc.
7. You can also save the report for later use.
8. When you save a report, make sure you have the end date in the future so that the report data is updated every time you run it.



9. Also saved reports can be parked and added to a Parked Report Group that could be accessed by non-login users.

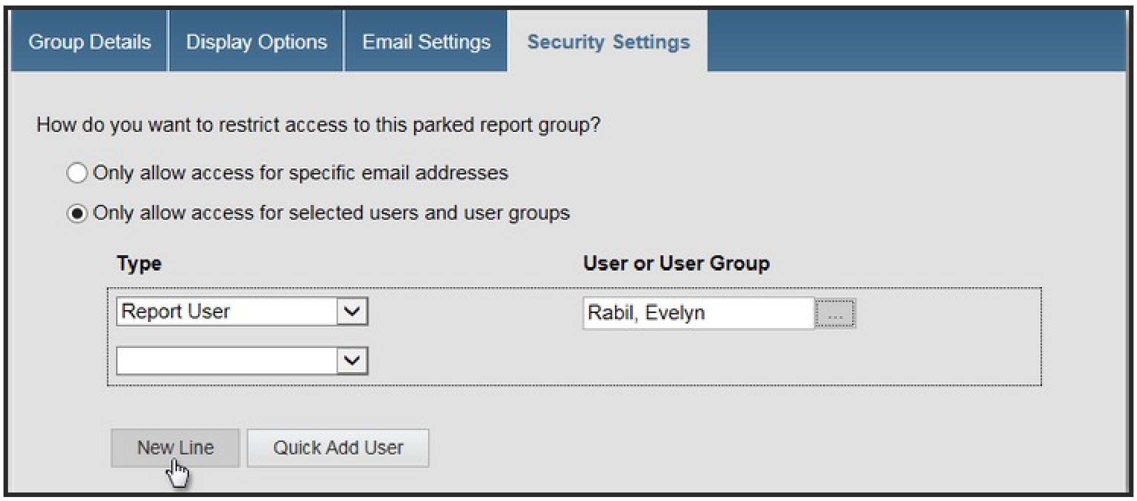
Adding Reports to a Parked Group

1. Create a parked report group.
2. Click on Admin in the top right, then click Reports in the blue navigation bar. Under Section Links on the left, click Parked Report Groups. Click Add in the middle of the page.
3. Name the group for your reference. Enter the date your parked reports page will expire in the **Auto Close Date** field. No one will be able to access these reports once this date passes.

4. Click **Edit**, then **Add Report**. When the pop-up appears, click **Select** to the left of the reports you want to include.
5. You can also filter for reports by entering criteria in the Report, Source, or Report Type fields and clicking Search.
6. Once you're done, click Save. Each report now appears as a link on the parked reports page.
7. To upload a header image and add content to the parked reports pages, click the neighboring tab, Display Options.
8. Click the neighboring tab, Email Settings. You can create an email with a link to the parked reports page and schedule it to remind recipients to check in for the latest data.
9. Use the dropdown to select a From Email Address and enter a From Name in the appropriate box. Select the date, time, and frequency of when the email will go out.
10. Include a subject line and consider adding a message in the appropriate textboxes. If you are requiring

a password, include that information here as well. Click HTML to stylize the text or add images.

11. Click Save.
12. You can protect your reports page with a password and restrict access to specific email addressesor users by selecting the rightmost tab, Security Settings.
13. Click Edit.
14. To limit access to specific email addresses, select the first radio button option. Create a password and list the email addresses, one per line, in the appropriate textbox.
15. Remember to include the password in the email message created in the Email Settings tab.
16. If you've created any Report Users, select Only allow access for selected users and user groups. Then, choose Report Users from the dropdown and click the ellipsis (...) in the User or User Group text box when it appears.
17. Click Select to the left of an existing user's name in the pop-up. Use the remaining dropdowns to add more users. Click **New Line** to add more dropdowns.



18. Further limit access by specifying which IP addresses (codes that identify a computer network) can log in to the parked reports page. Select "Yes, also restrict by the specified IP addresses" and list the IP addresses, separated by commas, in the following format: 123.4.5.6.
19. In the last textbox, you can edit the text that appears when people have been denied access to the parked reports.
20. Click **Save**.

Running Reports for ACM Membership

Some conferences provide complimentary SIG membership, or allow for membership purchasing/renewals during the registration process. At the close of the conference, the committee must provide this list to their Conference Operations Liaison so the memberships can be processed.

1. In your Cvent account, select "Reporting" on the upper right-hand side
2. Under "Reports" select "Custom Reports"
3. Select "Create Custom Report" (green button on right-hand side)
4. Step 1: Select What to Report On: select default type "All Attendees" and click "Next"
5. Step 2: Select What Fields to Display. On this screen you are going to **delete ALL Fields** by clicking the trash can icon on the right-side of each field.
6. Once all fields are gone select the "Add Field" button. Select the following fields under the default category "Personal Information" drop-down menu:

a. First Name
b. Last Name
c. Email Address
d. Mobile Phone

7. Switch the category drop-down menu to "Address Information" scroll down and select:
   a. Primary Address
   b. Primary City
   c. Primary State/Prov
   d. Primary Zip/Postal Code
   e. Primary Country

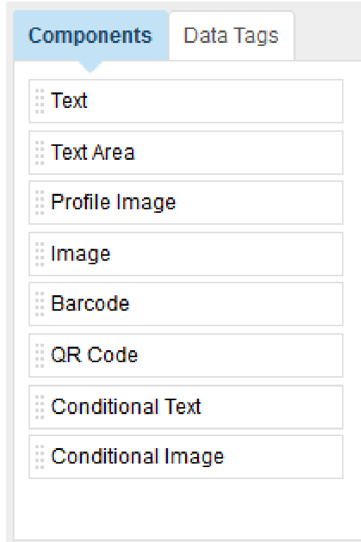
8. Select "OK"
9. You will then need to reorder the report using the arrows on the right-hand side. Please reorder as follows:
   a. First Name
   b. Last Name
   c. Primary Address
   d. Primary City
   e. Primary State/Prov
   f. Primary Zip/Postal Code
   g. Primary Country
   h. Email Address
   i. Mobile Phone

10. Once the fields have been reordered, click "Next"
11. Step 3: How to Group and Sort Data. Leave at default and click "Next"
12. Step 4: Limit Which Data Will be Displayed. Leave at default and click "Finish and Run Report"
13. The report will process on the next screen and will appear with a bar across the top. Click on the disk and run the report as "Excel"

Badges

1. Click on Badges & Certificates under Website & Registration > Onsite.
2. Click on Create New on the right side of the page.
3. Step 1: Enter the basic details like the Name, Type and Stock.

4. Step 2: Design your badge choosing from Components and Data Tags from the section on the left.

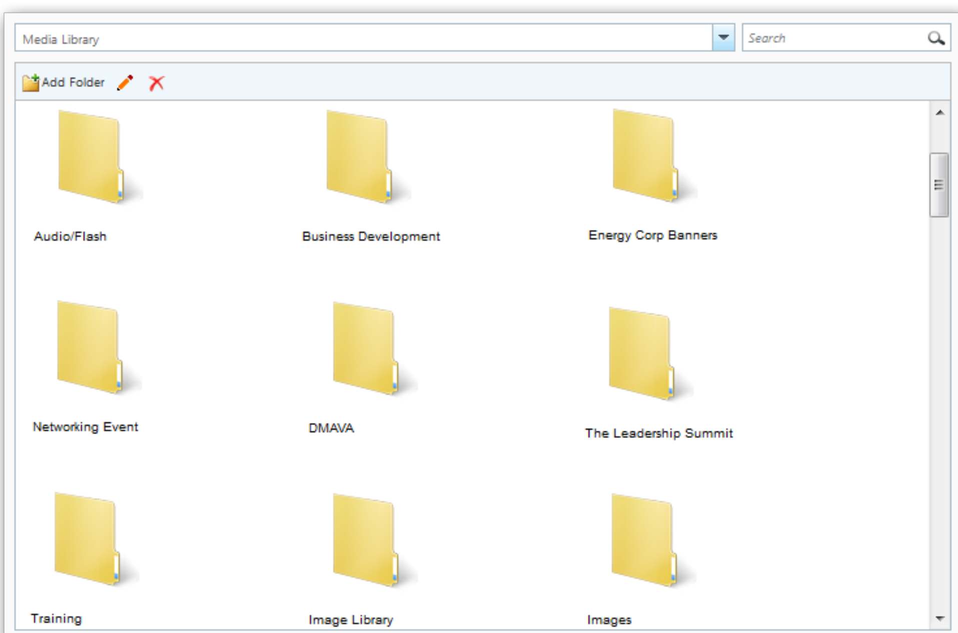


5. Add logo to badges:

https://support.cvent.com/apex/CommunityArticle?id=000002465&Lang=en_US&searchTerm=badges

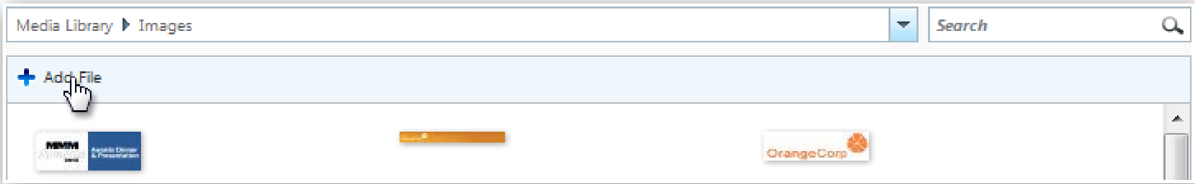
Instructions to add an image:

Access the Media Library. Begin by selecting **Admin** in the top right. Hover over Libraries and, under Templates, click **Media Library**.



2 Upload the file. Double-click a folder. *You cannot add a file without first opening a folder. We have a "**Logos**" and "**Images**" folder set up. Please make sure to label your image correctly.*

Click **Add File** at the top left of the library, and locate the file on your computer or network. Select open.

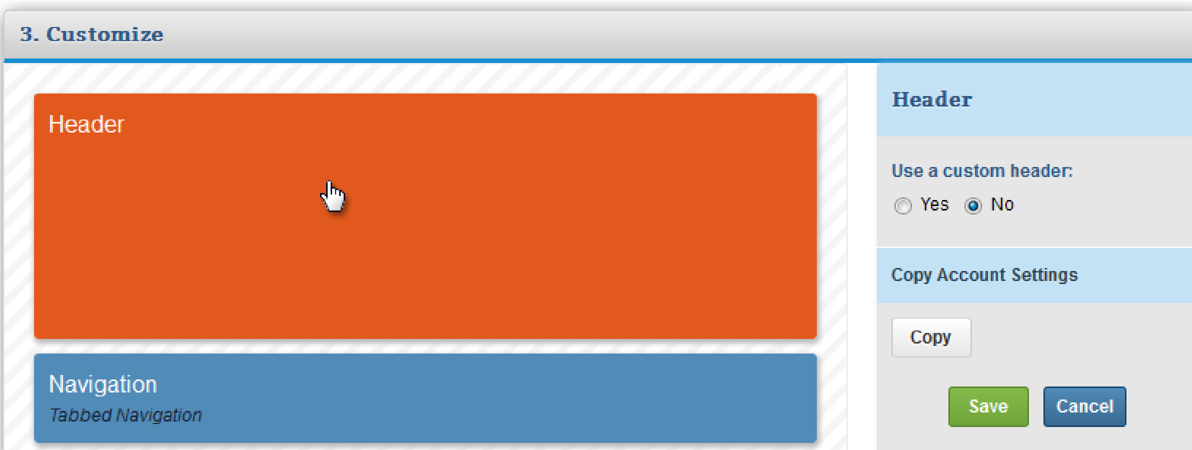


Go back to your event to add the header.

Access the Layout tab. Under Solutions at the top of the page, select **Events**. Choose your event. Hover over Website & Registration and, under Website, select **Event Website**.

The Pages tab opens by default. Click the neighboring tab, **Layout**.

Add a header. Click the Header section. Additional settings will appear to the right.



Activate the header by selecting **Yes**. Click the ellipsis (**...**) in the Image field. Double-click the folder, then the file. Don't see your image? Open a folder and click **Add File** to locate the file on your computer or network.

You can enter a web address in the URL field and your header becomes a clickable link. Direct invitees to your organization's site, or give them an easy way to return to the Summary page.

Select how the header will align. Click **Save**.

CERTIFICATES OF ATTENDANCE

A certificate of attendance option has been added to the registration process functionality. ACM has come up with a standardized format that can be automatically generated within the CVENT system. Certificates can be printed for those that request them and made available when badges are picked up.

Go to registrant list by going to Invitee Management --> Invitees & Registrants

1. Click Advanced Search link on the top right.
1. Under "Advanced Filters"...
    1. Select "Certificate of Attendance" from the dropdown under the field column.
    1. Select "Equals" from the dropdown under the "Operator" column
    1. Click the "..." next to the box under the "Value" Column and select the option from the pop-up that says "Check this box if you would like to receive a certificate of attendance"
1. Click "Search"
1. All attendees who appear have selected to receive a certificate of attendance.
1. Click the checkmark to the right of each name to print their certificate (Shortcut - to select them all, you can click the check box located in the header row)
1. Select the "Bulk Actions" dropdown on the top right.
1. Select "Print Badges" from the dropdown.
1. If there are multiple badges created in the event, you will need to select the "Certificate of Attendance" option
1. It will generate a PDF with all certificates to print.

You can also print a certificate for an individual attendee by clicking into their record, and selecting “Print Badge” from the “Actions” dropdown.