CVENT User Guide
Updated December 2018
Recent Update Summary

Recent updates as of December 2018:

• All events with registration fees that contain a gift component (in addition to expense component) will now need to be set up as standard events. This will allow event planners to input the breakout information (gift versus value of goods/services) within CVENT so that transmittal forms are no longer needed. **Important:** planners will need to set up each ticket/sponsorship item as a unique session in order to include this breakout information. Instructions for how to include these details are on slides 121 and 122.

• All CVENT inquiries and requests for assistance during setup should be submitted through the CVENT support request form.
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CVENT Support Request Form

Use this form to request a new CVENT account creation and/or to submit any questions/issues you have during event setup.

New Event in CVENT Form

Use this form **each time** you have a new event that you are setting up in CVENT. Submitting this form will notify IT that your event needs an AWA ID number created, and communications that you have an event that needs to be placed on the RUAA event calendar. It will also help communications track down your event quickly should you have any trouble during setup.

All forms and training materials can be found by accessing [Ralumni.com/CVENT](http://Ralumni.com/CVENT)
CVENT Overview

CVENT is an event management platform that allows event planners to more easily navigate every aspect of the event process.

CVENT will allow foundation staff members and university partners (academic schools and units) the ability to handle their own event setup and management directly within the CVENT platform. This will allow for a faster turnaround for the creation of secure, easy-to-navigate, visually appealing event registrations from pre-built but modifiable templates.
What Events Should be Built in CVENT?

CVENT is being used for **alumni and donor events only**. Student, faculty/staff, or any other event types should not be built in the foundation’s instance of CVENT. If you are unsure about where your event should be built, please submit the [CVENT support form](#) for guidance.
How Do I Get Started?

If you haven’t attended a CVENT training session, please submit the CVENT support request form to set up a 1:1 training.

Identify one to two dedicated CVENT users from your group. Look for those who are comfortable with (and hopefully even excited about) learning and adopting new technology. CVENT is an intuitive and easy-to-use platform, but your group's users should expect to spend a bit of time with the training materials to become familiar with the process.

You’ll need to confirm or obtain a NetID or Guest NetID for each identified user and fill out the CVENT support request form to request account creation. Once your users are registered, they will receive an email with details on how to sign into CVENT for the first time.

Click here and bookmark this page—this is the CVENT single sign on page. To sign in, enter NetID or Guest NetID and associated password.
Step 1: *If your event has a fee, you must obtain an event allocation code and merchant account from foundation accounting.*

If you do not have an allocation code created for your event, the funds will not be properly tracked so it is extremely important that this is still the first step you take when setting up your event. When accounting sends you your event allocation code, you will also receive the merchant account to use for the event. The CVENT training guide will provide details on how to include it (and your allocation code) in your event.

You can follow the usual process to submit to accounting for your allocation code and merchant account. Those steps have not changed.

Please note that your fee-based event cannot go live without an allocation code and merchant account assigned from accounting.
Event Setup Process – Before You Begin

What are merchant accounts and how do I know which one to use?

Merchant accounts dictate where your event fees go once a credit card payment is submitted. As a reminder, the correct merchant account will be provided to you from accounting when you receive your allocation code. If you do not receive a merchant account and are unsure of which to use, please ask accounting.

There are three separate merchant accounts that can be selected in CVENT:

• Use **RUEVENTS** when there is a ticket price that does not contain a gift component, regardless of whether or not there is a *separate* donation field included in registration

• Use **IMOD08901** when there is a ticket price that **does** contain a gift component, regardless of whether or not there is a *separate* donation field included in registration

• Use **Online08901** when there is **no ticket pricing** (no fees), just a *separate* donation field included in registration
Event Setup Process – Before You Begin

Step 2: **Click here to fill out the "New Event in CVENT" form.** You must fill out this form for **ALL events** (fee-based and complimentary)

**What’s the purpose of this form?**

- To notify communications about whether or not your event will need to be placed on the RUAA site event calendar
- To make it easy for communications to locate your event in CVENT should you have any trouble during setup and need assistance
- To notify the web and IT teams that there needs to be a new AWA ID set up for your event
  - The AWA ID is important because it allows IT to update your event in the AWA database with registration numbers, attendee information, etc. **All events must have one (both free and paid).**
Step 3: Begin setting up your event!

As long as you have submitted the form outlined on the previous slide, you are ready to begin setting up your event.

IT and communications will reach out to let you know they have received your form, and will provide you with your AWA ID (you’ll need this in addition to your allocation code during setup).
Logging into CVENT

After requesting account access, you will receive a “first time login” email directly from CVENT (be sure to check your SPAM folder as it sometimes winds up there). If you did not receive, and need this to be resent to you, please submit the CVENT support request form.

Follow the instructions to activate your account. Moving forward, you can use the following link to log in: https://rufsso.rutgers.edu/default2.htm

- This is our single sign on link – you should see the link for “CVENT – Event Management and Registration” on that page (you may also see your link to access Marketo if you have an account there as well)
Logging into CVENT

You will be prompted to log in using your Rutgers NETID or Guest NETID and associated password.
Once you are logged into CVENT, you will see the navigation bar in the upper right corner of the screen with the link for “Help and Support.”
CVENT Support Resources

The CVENT support section offers a number of useful resources and training videos, should you ever need any extra guidance above and beyond what this training manual offers.

Once you click the “Help & Support” link, you will see the section for “Getting Started” resources in the center of the page. You will want to click the link for the “Event Management” section – indicated below.

![Getting Started](image)
After clicking on “Event Management” you can follow the instructions on the next page depending on what type of support you need.

Helpful basic video resources for event creation and website and registration management can be found by clicking here.

Should you have any specific questions, you can use the search bar within CVENT’s support section.
CVENT Support Resources

If you are running a keyword search, try and be as specific as possible – for example, if you are looking to learn how to set up new sessions, type “creating sessions” instead of just “sessions.”

Under each search result, you can read the general description to ensure it is what you are looking for.
Navigating the Events Homepage

Once you log into CVENT, you will land on the Events Homepage, which lists all of the events currently configured in the platform.

If you ever log into CVENT and do not see the event listing, simply expand the menu at the top of the page next to “Solutions” and select “Events.”
Navigating the Events Homepage

For each event in the list on the homepage, you will see the following:

- Event title (clicking this will take you into the event creation wizard)
- Unique event code, generated by CVENT
- Event status
  - Pending is still in “setup” mode and is not live
  - Active is a live event
  - Closed is an event that an administrator manually closed prior to event date
  - Completed is an event that already took place
- Start Date
- Status of Registrants (Yes/No/Invited)
Navigating the Events Homepage

If you already started setting up your event and need to access it to make edits/set it live/etc., simply click on the event title link to enter your event creation wizard.
Creating Your Event

If you are looking to create a new event, click on the green “Create Event” button in the upper right corner of the screen.
Creating a New Event in CVENT: Event Details

Once you click the create event button, you will launch the event creation wizard. This is where you will choose the type of event you want to create.

We have created a number of templates for you to choose from, depending on the type of event you are hosting.

**Important Note:** If your event has tickets or sponsorships that contain a gift component, you **MUST** use a “standard” event type.

**Template names include:**
- RUAA-Basic Ticket-Express
- RUF-Basic Ticket-Express
- RUAA-Standard
- RUF-Standard
Creating a New Event in CVENT: Event Details

Under “Creation Method” choose “Using an Event Template.” If you are cloning a previous event that already exists, you can select “Using an existing event.”

Next, select which template you would like to use under “Using an Event Template.”
Choosing an Event Template

When to choose an “Express” event template:

- If your event does **not** contain a separate donation field/component
- If your event is free and you are looking to set something up quickly
- If your event has a simple ticket pricing structure
  - *Example:* a single ticket price for everyone who attends (including guests)
- If your event does **not** require registration types, which are used to create custom registration tracks depending on selection
  - *Example:* Faculty members see a *different* pricing structure than alumni/students/guests/etc.
- If your event does **not** require multiple sessions
- If you do **not** need to include multiple separate event website pages (agenda, speaker info, contact info, etc.)

If you are ever unsure of whether you should use an express or standard template during your event setup, please [submit the CVENT support request form](#) for assistance.
Choosing an Event Template

When to choose a “Standard” event template:

• If your event fees (tickets or sponsorships) contain a gift component
• If your event has a more complex ticket pricing structure
  – Example: Multiple price points that you only want to display to certain types of registrants (alumni see one price, sponsors see another)
• If your event contains a separate donation field/component
• If your event requires multiple sessions
• If you are looking for more control over your registration website (including separate pages for speaker information and agenda, for example)

If you are ever unsure of whether you should use an express or standard template during your event setup, please submit the CVENT support request form for assistance.
Express Event Templates

Deciding which express template to choose:

• RUAA-Basic Ticket-Express
  – Branded with Scarlet Forever and the RUAA logo, this template should be used for alumni events that have a basic ticket pricing structure, or for free events that DO permit guest registration. This template allows you to offer “free” tickets so that registrants can sign up for guests.

• RUF-Basic Ticket-Express
  – Branded with the Foundation logo, this template should be used for Foundation events that have a basic ticket pricing structure, or for free events that DO permit guest registration. This template allows you to offer “free” tickets so that registrants can sign up for guests.
Standard Event Templates

Deciding which standard template to choose:

- RUAA-Standard
  - Branded with the Rutgers University Alumni Association header

- RUF-Standard
  - Branded with the Rutgers University Foundation header
Setting up an Express Event

1. Express Event Details
2. Express Event Overview
3. Express Event Website
4. Express Event Registration
5. Express Event Confirmation
6. Express Event Modification
7. Express Event Promotion & Communication
8. Express Event Advanced Settings
9. Express Event Testing
10. Express Event Launch
Express Event Setup: Event Details

Once you have decided on your express event template, and you select it, you will see all of the settings below adjust accordingly. Leave the “Handling Method” settings as they are (Set scheduled emails to be manually sent instead).

Fill in the event title, category, and description. Your description will pull through onto your event website.
Fill in your event capacity. This is the maximum number of registrants and guests that can sign up for an event. Once the capacity is reached, the event will automatically close. If your event does not have a capacity, leave this field blank.

Fill in the deadline for registration (the last date that your event site will accept registrations) as well as the start date/time and end date/time for your event.
Express Event Setup: Event Details

**Tip:** If you ever get stuck on a field and are unsure what to fill in on what the field means, you can hover over the “?” icon to the right of the field, which will provide instructions that are specific to that field.
Express Event Setup: Event Details

Fill in the location of your event; including the name of the building/space in the “Location” field, along with the address, city, state, zip.
Express Event Setup: Event Details

Fill in the event planner details. Note that each template has an assigned set of email addresses so you will not be able to add in an email address other than the ones in the dropdown.

Your event’s registration confirmation/modification emails will send from this address. Your registrants should NOT reply directly to this email address. Instead, you should include the email address of the event’s RSVP contact in the body of the email. More on this later…. 
Express Event Setup: Event Details

If your event is ticketed and requires pricing, enter in the name(s) of your ticket types, as well as the ticket capacity and price.

Note: ticket capacity is the maximum number of registrants for that ticket type.

You can also expand the “Details” dropdown if you would like to add a ticket description and ticket max quantity.

Note: ticket max quantity is the maximum number of tickets that each registrant can select.
Express Event Setup: Event Details

- **Name**: Alumni Ticket
- **Capacity**: 100
- **Price**: $50.00
- **General Ledger Code**

This event can have a total of 100 Alumni Ticket registrants.

- **Name**: Ticket type 2
- **Capacity**: 
- **Price**: $2.00

Each registrant can purchase no more than 2 total tickets (one for him/herself and one for a single guest, for example).
Express Event Setup: Event Details

You can add as many additional ticket options as you’d like to your event. Tickets can either be paid or free. You can also remove ticket types by clicking the trash can icon to the right of the ticket name.

To delete one of the pre-built ticket types, you will need to save your event first, then return to the “Event Details” tab, click “Edit” and you should see the trash can icon appear for your ticket types.

After you finish adding your ticket types, you can select your payment options below. We will only be selecting “Credit Card” as a payment type for registrants. You have the option of entering offline payments via cash/check as an admin on the back end of the platform.

Payment Options

<table>
<thead>
<tr>
<th>Currency: U.S. Dollar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Methods:</td>
</tr>
<tr>
<td>Credit Card</td>
</tr>
<tr>
<td>Check</td>
</tr>
<tr>
<td>Offline/Other</td>
</tr>
</tbody>
</table>

* Merchant Account: ruevents

Charge a service fee for payment methods:
- Yes
- No

This can remain as “No”

Select the merchant account provided to you by accounting
Express Event Setup: Event Details

When you are happy with all of your event details, click the green “Finish” button in the lower right corner of the page.

The next screen you see will be your event overview. This provides you with the high-level details about your event, and includes the “Planning Steps” to help you stay organized as you set up your event.

The first thing you will need to do is click back to the “Event Details” tab. Click the green “edit” button in the upper right corner of the screen and scroll down until you see the section for “Custom Event Fields.”
Express Event Setup: Event Details

This is where you will plug in the AWA Event ID provided to you by IT, as well as the Event Allocation ID you received from accounting (if your event is fee-based). You do not have the option of including a donation field for Express events, but the Donation Allocation Code will come in handy for Standard events with a donation component.

Once you have these fields populated, click the green “Save” button in the upper right corner of the screen. You will be back on your event overview page, where you can view all of setup items in your “Planning Steps” section.
Express Event Setup: Event Overview

You can check off each “Planning Step” item as you go to make sure you haven’t missed any steps while setting up your event.

The items listed under “Event Details” were the components you set up on the previous screen (event name/date/time/location/ticket types/etc.) so you can check those off as along as you are happy with everything.

You can preview your event website at any time by clicking the “Preview” button in the upper right corner of the page.
Express Event Setup: Event Website

The next step is to set up your event website. As a reminder, since you are working on an express template, your website will be simple (one page) and will not allow for customization of page types. That option is only included for standard events.

Click on the “Website & Registration” tab at the top of the page.

This will bring you to the website builder.
Express Event Setup: Event Website

From here, you can click “Customize” under “Website” to adjust the settings for your event website. Remember, you already did the heavy lifting during the “Event Details” phase when you added your event title/date/time/location/description/etc. These details pull in automatically on your event website.
Express Event Setup: Event Website

On the next page, you will see your event website template. You have control over most of the sections that show on this page. You can add new event widgets, delete entire sections, adjust imagery, etc.

You will want to either add your own header image to replace the sample, or, if you don’t have a header image, remove the section entirely so nothing shows.

**Image dimensions:**

900 pixels X 320 pixels

**To add:**

1. Add Image from Media Library
2. Choose folder to place image
3. Click “Add File” (upper left)
4. Select file and click “Insert”
5. Click green “Apply” button
Express Event Setup: Event Website

Once you’ve added your own header image or removed the sample image in place, scroll down and confirm that the rest of the site’s sections appear as you want them to.

You will see that CVENT automatically inserts a location map based on the location details you entered in during the event details phase.

You shouldn’t need to make many adjustments to this page as all of the information is based on your event details. If you want to add any additional elements from the “Event Widgets” tool bar (screenshot on the next slide) simply click and drag the widget onto the page in the location you want it to sit.

You will notice at the top right of the page that there is a social media “share” bar. If you do not delete it, you will want to make sure to hover over the “Settings” icon and adjust the post title and post text (as well as the post text and hashtag sections for Twitter). If a registrant shares your event to his/her social media account, this is the text that will automatically pull into their post. See screenshot on the next page for reference.

*The edits you make to your social media share settings on the “Website” page will automatically update on your “Registration” and “Confirmation” pages as well.*
Express Event Setup: Event Website
Express Event Setup: Event Website

Express Event Setup: Event Website

Melissa's Event - Express Ticketed

SAMPLE EVENT IMAGE
PLACE YOUR IMAGE HERE

EVENT DATE & TIME
November 29, 2017
6:00 PM - 10:00 PM

Register Now

Winants Hall
7 College Avenue
New Brunswick, New Jersey
Express Event Setup: Event Website

Remember to save your event website each time you make a new change. The green “save” button is located in the upper right corner of the screen.

Once you make an update and save the page, you can preview your site to make sure it looks good.

If you are happy with the look of your event website, you can click the “Close” button in the upper right corner of the screen to begin the next step.
Express Event Setup: Registration

After closing out of the website builder, you will return to your site’s “Website & Registration” tab. You’ll move on to begin customizing your “Registration” settings next.

**NOTE:** If you are working on the “RUAA Basic Free-Express” template, you will NOT see the Registration/Customize option. Instead, all of the contact fields and questions will be found on your WEBSITE page so you will need to make edits there.
Express Event Setup: Registration

This page looks similar to the event website builder that you worked on previously. On this page, you can choose to add/remove whatever registration questions you’d like.

Standard questions already included are first/last name, email address, school, and class year. The questions are required by default, but you can easily edit to make any question unrequired by hovering over the question, clicking the “Settings” button, and selecting the radio button to “Not Required.”
Express Event Setup: Registration

The widget on the left side of the screen gives you the option of adding additional fields/questions to your registration form.

You can choose from the list of “Standard Contact Fields” or “Custom Contact Fields” which are pre-existing questions already in the system OR you can use the “Question Tools” widget to build your own custom questions.
Express Event Setup: Registration
Express Event Setup: Registration

**Note:** If a registrant purchases more than one ticket, all of your registration page fields will duplicate. For example, if someone chooses 2 tickets on your main event website, there will be two sets of questions for the registrant to fill in on the next page. One set for the registrant and one set for the guest.

As a reminder, make sure that each time you make an adjustment to your registration page (update question settings, add a new question, etc.) you click the green “Save” button in the upper right corner of the screen.

You can preview at any time – each time you preview, you will begin on your main event website and will need to select your ticket type before you can view your registration page.

When you are happy with your registration questions, click the “Close” button in the upper right corner of the screen.
Express Event Setup: Confirmation

When you return to the “Website & Registration” tab, you will have the option to customize the confirmation page, and modification page.

**Important note on modifications:** If your event is fee-based, you will need to disable the event modification feature. This is because CVENT automatically refunds registrants when they modify their registration and choose a different ticket type. Accounting will need to handle all refunds manually, so registrants will need to notify the event planner if they wish to cancel or modify their original registration.

You will only need to customize your modification page if your event does not carry a fee.
Express Event Setup: Confirmation

The confirmation page includes standard information about the event; title, date, time, location, location map, as well as a list of event widget that can be added if you want additional features on your confirmation page.

If you see an “Event Modification” button on your confirmation page, you will need to delete it if your event is fee-based.

To delete a section, hover over the section and click the trash can icon in the upper right corner.
Express Event Setup: Confirmation

Again, remember to save if you make any changes to the confirmation page.

You can choose additional options from the widget builder on the left, including the option for the registrant to “Register Another.”

**Do not include the option for the registrant to “Unregister”** as this will provide him/her with an automatic refund. Refunds are to be handled manually by accounting so we should not provide the option to automatically cancel registration through CVENT. More on this later in the presentation.

Once you are happy with the page layout, click the “Close” button in the upper right corner of the screen to return to your “Website & Registration” tab.
Express Event Setup: Modification

As a reminder, you will only need to make adjustments to your modification page if your event does NOT carry a fee.

This page will automatically populate with the questions you set up during your “Registration” customization so you should not need to make many (or any) adjustments but feel free to take a look to ensure the page looks good.
Express Event Setup: Promotion & Communication

You are now ready to configure the final few steps of your event before you test and set it live!

Click on the tab for “Promotion & Communication” – this is where you will be setting up the automatic registration confirmation email that is generated for the registrant(s).
Express Event Setup: Promotion & Communication

The first thing you will see on the next page is the “Weblink” for your event. Just a note that this link will not work until you set your event live but you can copy it for your records.

Since we are managing all of our event promotion emails through Marketo, you will only need to worry about the following two email templates in the list – please ensure all other emails are disabled.

- Registration Confirmation
- Modification Confirmation (Only if your event does NOT carry a fee)
Express Event Setup: Promotion & Communication

<table>
<thead>
<tr>
<th>Event Emails</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation</td>
<td></td>
</tr>
<tr>
<td>Send: Manually to Undecided Invitees</td>
<td></td>
</tr>
<tr>
<td>Invitation Reminder</td>
<td></td>
</tr>
<tr>
<td>Send: Manually to Undecided Invitees</td>
<td></td>
</tr>
<tr>
<td>Event Reminder</td>
<td></td>
</tr>
<tr>
<td>Send: Manually to Accepted Registrants</td>
<td></td>
</tr>
<tr>
<td>Modification Confirmation</td>
<td></td>
</tr>
<tr>
<td>Send: Automatically to Accepted Registrants</td>
<td></td>
</tr>
<tr>
<td>Registration Confirmation</td>
<td></td>
</tr>
<tr>
<td>Send: Automatically to Accepted Registrants</td>
<td></td>
</tr>
<tr>
<td>Cancellation Confirmation</td>
<td></td>
</tr>
<tr>
<td>Send: Automatically to Cancelled Registrants</td>
<td></td>
</tr>
<tr>
<td>Regret</td>
<td></td>
</tr>
<tr>
<td>Send: Automatically to Declined Invitees</td>
<td></td>
</tr>
</tbody>
</table>

This is your event link: http://www.event.com/4/5tc0z32
Start with your “Modification Confirmation” email. This deploys automatically if the registrant makes any adjustments to their existing registration settings. As a reminder, you only need to worry about this email if your event does NOT carry a fee. Modifications will be handled manually for all fee-based events.

If your event is fee-based, you can follow the same steps below but only for your “Registration Confirmation” email.

You will land on the “Details” tab, which includes the subject line that will deploy for the email. ({{E-TITLE}} is the event title that will pull in automatically), as well as the from name of the email. This automatically pulls in the planner first and last name that you set up initially.

If you want to make any adjustments to the settings on this tab, click the green “Edit” button in the upper right corner of the screen.
Express Event Setup: Promotion & Communication

Modification Confirmation

- **Type:** Modification Confirmation
- **Name:** Modification Confirmation
- **Subject:** Modification Confirmed - {{E-TITLE}}
- **From Name:** {{F-FIRST NAME}} {{F-LAST NAME}}
- **From Email Address:** events@ruf.rutgers.edu
- **Active:** Yes

**Send Settings**

- **Audience:** Accepted Registrants
Express Event Setup: Promotion & Communication

Once you are happy with your email details, click on the “Content” tab to set up the body of your email.

The good news is that this section automatically populates with standard registration details, so you shouldn’t need to make too many adjustments.

**Important:** You should be sure to include instructions about the *specific email address* to which you’d like registrants to send any questions. **We do not want them to reply directly to the confirmation email**, as it will not wind up in the correct inbox.

You can also customize the “thank you” message that is included in this email if you’d like. Simply click the green “Edit” button, and begin typing what you’d like to include in the email.
Recommended instructional text for emailing with any questions or concerns:

If you have any questions about the event or your registration, please send an email directly to [INSERT EMAIL ADDRESS]. Please do not reply directly to this email as the inbox is not monitored and your question will not be received.

The next slide will demonstrate how and where to insert the text above.
Express Event Setup: Promotion & Communication

[Image of a webpage showing a modification confirmation with content widgets and a sample email message]

Dear [F-FIRST NAME],

Your registration has been modified. Please save this email for future reference.

Event: [E-TITLE]
Date: [E-START DATE]
Time: [E-START TIME]
Location: [E-LOCATION]
Current Registration: [C-CURRENT REGISTRATION]
Confirmation Number: [C-CONFIRMATION NUM]

Sincerely,
[F-FIRST NAME] [F-LAST NAME]
[F-EMAIL]
Express Event Setup: Promotion & Communication

Dear {C-FIRST NAME},

Your registration has been modified. Please save this email for future reference.

If you have any questions about your modification, please send an email directly to melissa.rodenbach@rutgers.edu. Please do not reply directly to this email as the inbox is not monitored and your question will not be received.

Event: {E-TITLE}

Date: {E-START DATE}
Time: {E-START TIME}
Location: {E-LOCATION}

{C-CURRENT REGISTRATION}

Confirmation Number: {C-CONFIRMATION NUM}

Sincerely,
{P-FIRST NAME} {P-LAST NAME}
{P-EMAIL}
Express Event Setup: Promotion & Communication

Once you are happy with the content included in your modification confirmation email, click the tab for “Advanced Settings.”

Click the green “Edit” button in the upper right corner of the screen.

Under “Advanced Settings” click the “No” radio button.
Express Event Setup: Promotion & Communication

Under “Additional Recipients” you can include all of the email addresses that should receive a notification any time a registrant makes a modification to his/her registration. You can add as many as you would like.

Adjust the dropdown menu from “Account User” to “Email Address” and enter the email address in the “Recipient” box to the right. You only need to click “Add Recipient” if you are adding more than one to the list. When finished, click “Save.”

Note that if your event carries a fee, you must include a Foundation staff member’s email address in order for the fee to be properly recorded.
Express Event Setup: Promotion & Communication

The final tab is for the email “Preview.” This is a nice way to see (generally) how the email will look when it reaches the registrants.

Under “Content Analysis” you should not ever see a high risk score, but if you do, please [submit the CVENT support request form](#) to request that someone take a look for you and recommend adjustments.
Express Event Setup: Promotion & Communication

When you are happy/finished with your modification confirmation email (for free events only), click the “Close” button in the upper right corner of the screen, and move on to make the same adjustments for your “Registration Confirmation” email.

You can follow the same exact steps for your Registration Confirmation email.
Express Event Setup: Promotion & Communication

**Important note for fee-based events:**

When you are configuring the “Content” section for your Registration Confirmation email, be sure to **delete** the line to allow registrants to modify their registration settings ({{E-MODIFY REG LINK}} to change your registration). See screenshot below for the location of the text to delete. When you are finished, click “Save.”

---

![Registration Confirmation email screenshot](image-url)
Express Event Setup: Advanced Settings

This is the final step before you test and launch your event.

Click on the “Advanced” tab at the top of your page.

This is where you will adjust your search engine and display settings. You will only need to make a few potential modifications on this page, so it is a quick step.
Express Event Setup: Advanced Settings

Under “Search Engine Settings” indicate whether or not you want your event to show in search results on Google/Bing/Yahoo (to name a few).

If you do, it is recommended that you include a few keywords and a short description of your event to improve its chances of appearing in search results.
Express Event Setup: Advanced Settings

Under “Event Calendar” select “No” – we will still be manually adding your events to the RUAA event calendar in the imodules platform (if applicable).

Under “Custom Badge” select “No.”

You should be all set with the adjustments needed on this tab. Be sure to click the green “Save” button in the upper right corner of the screen.
Express Event Setup: Testing

Congratulations! Your event is now ready to move to “Test Mode.” Just a short time now until you are ready for launch.

Navigate back to your event overview tab and click the blue “Perform Test” button.
Express Event Setup: Testing

On the test setup page, select the following settings:

- **Method**: Test the event myself
- **Area**: Website
- **Test for invitees who arrive from**: Weblink
Express Event Setup: Testing

Click “Start Test” in the upper right corner of the screen.

Make sure that you have popups enabled as the test link will open in a new window.
Express Event Setup: Testing

If your event is paid, and you want to test a credit card transaction to make sure it submits successfully AND to test your confirmation page and email, you can use the following test credit card numbers:

**Visa** - 4111111111111111 (Use any 3-digit number for the Card Security Code)

**Mastercard** - 5555555555554444 (Use any 3-digit number for the Card Security Code)

**American Express** - 378282246310005 (Use any 4-digit number for the Card Security Code)

The Expiration Date can be any date in the future.
Express Event Setup: Launch!

Once you are happy with your event testing, and have given your “Planning Steps” one last look, you are ready to set your event live.

Back on your event overview tab, click the green “Launch Event” button in the upper right corner of the screen.

**IMPORTANT NOTE:** Depending on your access level in CVENT, you may NOT see the “Launch Event” button. If you do not see the “Launch Event” button, you will need to [submit the CVENT support request form](#) for launch assistance.

Please provide your **event name and event date** so it can be located quickly.
Express Event Setup: Launch!

You’ll want to delete all contact information that was collected during testing.

Once you confirm, your event will officially launch. Well done!

As a reminder, your event link is located on the “Promotion & Communication” tab for access. You’ll want to copy it, as you will need it for your final steps.
Express Event Setup: Launch!

Now that your event is live, you will need to send a quick email to notify:

– **Accounting**: It will help accounting to know the event is live just in case they have any questions or concerns once transactions begin coming in.
  
  • Email Deanna Walker McDonald: dw367@ruf.rutgers.edu

– **Communications**: If your event needs to be included on the RUAA site event calendar, this process is still handled by Communications. Please allow **3 business days** for completion.
  
  • Please submit the CVENT support request form for assistance.
Setting up a Standard Event

1. **Standard Event Details**
2. **Standard Event Configuration**
3. **Standard Event Details**
   3a. Registration Types
   3b. Admission Items
   3c. Optional Items
   3d. Fees
   3e. Sessions
4. **Standard Event Website & Registration**
   4a. Website Setup
   4b. Registration Setup
   4c. Additional Registration Questions
5. **Standard Event Promotion & Communication**
   5a. Social Sharing
   5b. Event Confirmation Emails
   5c. Admin Confirmation Emails
6. **Standard Event Testing**
7. **Standard Event Launch**
Standard Event Setup: Event Details

Once you have decided on your standard event template, and you select it, you will see all of the settings below adjust accordingly. Leave the “Handling Method” settings as they are (Set scheduled emails to be manually sent instead)

Fill in the event title, category, and description. Your description will pull through onto your event website.
Standard Event Setup: Event Details

Fill in your event capacity. This is the maximum number of registrants and guests that can sign up for an event. Once the capacity is reached, the event will automatically close. If your event does not have a capacity, leave this field blank.

Fill in the deadline for registration (the last date that your event site will accept registrations) as well as the start date/time and end date/time for your event.
Standard Event Setup: Event Details

**Tip:** If you ever get stuck on a field and are unsure what to fill in on what the field means, you can hover over the “?” icon to the right of the field, which will provide instructions that are specific to that field.
Standard Event Setup: Event Details

Fill in the location of your event; including the name of the building/space in the “Location” field, along with the address, city, state, zip.
Standard Event Setup: Event Details

Fill in the event planner details. Note that each template has an assigned set of email addresses so you will not be able to add in an email address other than the ones in the dropdown.

Your event’s registration confirmation/modification emails will send from this address. Your registrants should NOT reply directly to this email address. Instead, you should include the email address of the event’s RSVP contact in the body of the email. More on this later….

<table>
<thead>
<tr>
<th>Event Planner</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong></td>
<td></td>
</tr>
<tr>
<td>Prefix</td>
<td></td>
</tr>
<tr>
<td>* First Name</td>
<td>Rutgers University</td>
</tr>
<tr>
<td>* Last Name</td>
<td>Alumni Association</td>
</tr>
<tr>
<td><strong>Company:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Title:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Email:</strong></td>
<td><a href="mailto:events@ruf.rutgers.edu">events@ruf.rutgers.edu</a></td>
</tr>
</tbody>
</table>
Standard Event Setup: Event Details

When you are happy with all of the information you have included on the “Event Details” page, click “Next” in the lower right corner.
Standard Event Setup: Event Configuration

The next screen that you reach will be the event configuration page. This is where you can enable/disable the features specific to your event. A nice feature about this page is that you can hover over the (i) icon to the right of each feature for an over of what the feature does so you can determine whether or not you need to include it. Any feature you want to include should be checked off and listed in green.
Standard Event Setup: Event Configuration

A few general rules of thumb:

– **IMPORTANT:** If your event contains tickets/sponsorships that contain a gift component, you will need to set them up as sessions, NOT admission items. This is so that you can assign each item’s “value of goods and services” and “gift component” to eliminate the need for transmittal forms. More to come in the “sessions” section.

– If your tickets do NOT contain a gift component, you can choose to set them up as individual admission items or sessions. The difference is that *sessions* allow registrants to choose more than one per registrant. Only one *admission item* can be assigned per registrant.

– If your event contains a donation component (a separate donation field), keep the “Optional Items” box selected.

– If your ticket(s) carry a fee, keep the “Fees” box selected. This is also where you will select your merchant account – be sure to select the merchant account that was supplied to you from accounting.

If you are ever unsure of which features to include for your event, please [submit the CVENT support request form](#) for assistance.
Standard Event Setup: Event Configuration
Standard Event Setup: Event Configuration

When you are happy with all of the features you have chosen, click the green “Next” button at the bottom of the screen. You will be taken to page 2 of your event configuration.

On this page, you can select additional features such as “Mobile Registration/Mobile Website” (recommended), “Registration Types” (if you want your registrants to be able to identify themselves as alumni, sponsor, faculty, etc.), “Guest Registration” and more.

Again, if you are ever unsure of what a specific feature is or does, simply hover over the (i) for a helpful tooltip/overview.

When you are finished on this page, click the green “Next” button in the lower right corner of the screen.
The final event configuration step is page 3, which contains features for promotion and communication of your event.

You will want to be sure to keep the “Weblinks” box checked, as this will generate the link to your event that you can then include in your Marketo emails and other messages.

You will also want to keep the “Email Alerts” box checked. Even though you’ll handle your event promotion through Marketo, you still need to be able to generate automatic event confirmation/modification emails through CVENT.
Standard Event Setup: Event Configuration

When you are happy with all of your event configuration settings, click “Finish” in the lower right corner of the screen. Clicking finish will officially create your event in CVENT.
Standard Event Setup: Event Configuration

Once you create your event, you will land on the “Event Overview” page. This is where you can access your event “planning steps” which will help you keep track of all of the items you are configuring in your event.

You will see the planning steps listed in the center of the page, but you’ll also notice a bar that is anchored along the right side of your screen. This navigation bar is present on every page during your setup, so it is recommended to check off each step using this bar instead of the box in the center of the page. See next slide for details.

The event overview page is also where you can view your event status, which is where you will return to test and launch your event when it is ready.
Standard Event Setup: Event Configuration
Standard Event Setup: Event Configuration

The first thing you will need to do once you reach the event overview page is navigate back to your “Event Details” page to fill in your AWA ID, Event Allocation Code (if your event is fee-based), and Donation Allocation Code (this is the allocation code for the specific fund to which donations will be made – use this field only if your event contains a separate donation field during registration).

Hover over the “Event Details” tab at the top of the screen and select “Event Information.”
Standard Event Setup: Event Configuration

Click the tab at the top of the screen that reads “Custom Fields” and then click the green “Edit” button. Enter in your codes (if applicable) and then click save.
Standard Event Setup: Event Details

Now you are ready to begin setting up your event details, including registration types, admission items, optional items (donations), and sessions if you have them.

Begin by clicking on the “Pencil” icon in your planning steps navigation on the right side of your screen. This will expand out your menu. Click on the first item in your list to begin configuration of that step.

In this tutorial, the first item in the list will be setting up registration types.
Standard Event Setup: Event Details

Registration Types

Setting up your registration types allows you to customize the experience for each registrant and helps you to categorize your registrants in reports.

Registration types are not required, but they can be a nice addition if you have a somewhat complex event with multiple ticket types to help streamline the experience for the registrant.

Being by clicking the “Edit” button in the upper right corner to add or remove registration types from the existing list.
Standard Event Setup: Event Details

Registration Types

The default registration type will be “No Registration Type” so if you delete all of the others from the list, everyone will have the same registration experience.

On the main screen, you can add in a max capacity for each registration type, or click the trash can icon to remove a registration type.

Keep in mind that if you have an overall event capacity, the total of all registration type capacities should not exceed your event capacity.
Standard Event Setup: Event Details

Registration Types

To make updates to a specific registration type, click the registration type name. On the next screen, click the “Edit” button to see all of the customization options available to you.

This page may seem overwhelming, but don’t worry. If your event does not have a complex ticketing structure or requirements for which tickets/sessions are available to each registrant type, you will not need to make many modifications here.

The next slide will provide a brief overview of the options available to you on this screen.
Standard Event Setup: Event Details

Registration Types

**Capacity:** If this registration type has a limit to how many can be selected, enter the capacity.

**Admission Items:** Once you set up your admission items (tickets), this is where you can indicate which admission items are available/visible to this registration type.

**Sessions:** Once you set up your sessions, this is where you can indicate which sessions are available/visible to this registration type.

**Optional Items:** If your event has a donation component, this is where you can indicate whether or not it should be visible to this registration type.

**Fees:** If your event has multiple price points per admission item (a different registration price for alumni vs students, for example), this is where you can indicate which price point should be shown for this registration type.

**Custom Website Pages:** You should not need to worry about this section unless you want to create a page that ONLY this registration type can view – not common.
Standard Event Setup: Event Details

**Registration Types**

When you are happy with all of your registration type settings, click the green “Save” button in the upper right corner of the screen, then click “Close” to close out of the editor.

You will return to your list of additional registration types. You can choose to make the same updates for each registration type if you need to.

Once you have finished your updates to each registration type, you are finished with this step of the process and can return to your planning navigation menu to mark this first step as complete.

For more information on using registration types, click here.
Standard Event Setup: Event Details

*Admission Items*

Next, you will move on to set up your admission items (ticket types). Under event details, click the link to “Create and set up your admission items.”
Standard Event Setup: Event Details

Admission Items

Your admission items are the different tickets/packages/etc. that you are offering during registration.

By default, you will see one admission item listed; Attendee Registration. You can remove this one by simply clicking on the dropdown arrow to the right of the admission item name and selecting “Delete.”

Reminder: If your ticket types/sponsorships contain a gift component, you should set them up as individual sessions, NOT admission items. More information to follow.
To add a new admission item, click the green “Create Admission Item” button in the upper right corner.

You will be taken to the new admission item details page, where you can enter in basic information about your item.

Fill in the admission item name and description (if applicable).

The next slide will give you a brief overview of the additional fields on this page so you can determine if you need to activate them.
Standard Event Setup: Event Details

Admission Items

**Name:** Enter in the admission item name (alumni registration, student registration, etc.)

**Code:** This is for reporting purposes and will populate automatically based on name, but you can adjust if you’d like.

**Availability:** Choose “Yes” if you only want certain registration types to be able to view/select this admission item – you will then need to select the registration types.

**Status and Capacity:**

- *Open for registration:* Indicates whether or not the admission item is available to purchase.
- *Automatically closes on:* If you want the admission item availability to end on a certain date.
- *Capacity:* If your admission item has a capacity – keep in mind your entire event capacity.

**Fees:** If your admission item carries a fee, you can select “Yes, a simple fee” and enter in the cost of the ticket as well as the fee name.

When you are finished setting up your admission item, click the green “Finish” button in the lower right corner of the screen. If you are setting up multiple new admission items, you can click “Finish and New” to begin setting up your next admission item.
Standard Event Setup: Event Details

**Admission Items**

When you are finished with all of your admission items, click the blue “Close” button in the upper right corner of the screen.

If you want to add “Early Bird Pricing” to your admission items, simply expand the admission item dropdown and select “Fees” to open the fee page for that admission item.

Click the green “Edit” button in the upper right corner of the page to open the fee details.
Standard Event Setup: Event Details

Admission Items

Click the link for “Add Early Bird Pricing…” under the admission item name.

In the popup, enter the details about your early bird pricing, including:

- **If Registered By:** This is the date that the early bird rate will close
- **Amount:** This is your lower pricing (early bird pricing)

Do not worry about the “Maximum Refund” field – we will not be establishing refund policies in CVENT. Instead, refunds should be handled manually by account in the event that a registrant needs to cancel.

When you are finished setting up your early bird rate, click “OK.”
Standard Event Setup: Event Details

Admission Items

As a reminder, we should not be setting up any refund policies for admission items since we do not want CVENT to refund anyone automatically. Click here to review the refund policy and procedure.

Once you have completed setting up all of your admission items, you are ready to navigate back to your planning steps navigation and mark the admission items step as complete.
Standard Event Setup: Event Details

Optional Items

Next, you can move on to set up your optional items (if you have them). Most commonly, this will include a donation field that a registrant can select during their registration process.

Click “Create and set up your optional items” in your planning steps menu.

Donation will show as the only optional item by default.
Click the link for the “Donation” to open up the details page. This page is where you can rename your donation, as well as enter in any additional details you have about your donation item.

**Amount allowed per invitee:** You can fill this in if you have a minimum/maximum amount that you can accept for a donation.

**Description:** This is a description of your donation item (you can include the specific fund to which the donations will be sent, or any other pertinent information).

**Availability:** You can choose which registration types have access to make a donation. If you select “Yes” you will need to then select the registration types from the list that expands.

**Status:**
- **Open for registration:** This determines whether or not the donation field is shown on the form
- **Automatically closes on:** This is the date the donation component is automatically removed from the form

**Advanced Settings (Registrant information):** Any text entered here will automatically pull through on the confirmation email that the registrant receives.
Standard Event Setup: Event Details

Optional Items

If you have **more than one fund** to which you would like to allow your registrants to make a donation, make sure to fill in the “General Ledger Codes” box with the allocation and account code for each fund you establish. This will help records track each donation to the appropriate fund.

If you have more than one fund and are using the “General Ledger Codes” box within each fund to input your allocation-account numbers, you do **NOT** need to fill out the “Donation Allocation Code” box in the event custom fields tab (as a reminder, this step is part of your event details setup).
Standard Event Setup: Event Details

Optional Items

When you are finished setting up your donation field, click “Save” at the top of the screen. You will return to the main “Optional Item” homepage.

If you want to include a new optional item, click the green “Create Optional Item” button in the upper right of the screen.

You will have the option to select your item types. Choices include:

- **Quantity item**: This can include something like a t-shirt or DVD at an event.
- **Group item**: This can include a golf foursome, or something that the registrant can enter in details for multiple registrants.
- **Donation Item**: This is a standard donation field.
Standard Event Setup: Event Details

Optional Items

As a reminder, if you decide you do not want to include any optional items, simply click the dropdown arrow next to the item name on the “Optional Items” homepage and click delete. You can also click the blue “Delete All” button in the upper right corner of the screen to remove items in bulk.

When you are happy with your optional items, navigate back to your planning steps menu and mark the optional items step as complete.
Standard Event Setup: Event Details

Review and Adjust Fees

The next step is a quick one. You have the opportunity to do another review of all of the fees you set up so far. Click the “Review and adjust your fees” link in the planning steps menu.

If you need to make any adjustments, you can do so by clicking the green “Edit” button on the next page, and selecting the fee that you would like to change.
Review and Adjust Fees

This is your opportunity to edit/delete any of your existing admission item fees. You can also add early bird pricing from this screen. As a reminder, do not establish a refund policy for any of your fees. Accounting will handle refunds manually.

Once you are happy with all of your fees, click the green “Save” button in the upper right corner, and mark the step to review and adjust your fees as complete in your planning steps menu.
Standard Event Setup: Event Details

Sessions

If your event is broken out into sessions, **or your event has ticket types/sponsorships that contain a gift component**, the next step will be to set up sessions. Navigate to your planning steps menu and click on “Create and set up sessions to establish the event’s agenda.”

Click the green “Create Session” button in the upper right corner to begin setting up your individual sessions.

**Fill out the basic information about your session, including:**

- Session name (**this can also be the name of your ticket type/sponsorship**)
- Session code (this will populate automatically based on the name)
- Start and end date and time of your session (**if you are using sessions as ticket types/sponsorships, the date/time can be the same for all**)
- Location of your session (you will need to add these to the list and they can be reused within the same event)
- Description (if applicable) – **you can use this to explain what’s included in sponsorship packages, etc.**
Standard Event Setup: Event Details

Sessions

Move on to fill in details for the next section, “Availability.”

- **Type:** This will indicate whether or not the session is automatically **included** with the purchase of an admission item or is an **optional** add on for registrants to choose. **If you are using sessions as ticket types/sponsorships, be sure to make them “optional.”**

- **Limit which registration types can select this session:** If you only want the session to display for specific registration types, select “Yes” and then choose the registration type(s) from the list that expands.

Move on to fill in details for the next section, “Status & Capacity.”

- **Open for registration:** This determines whether or not the session shows onsite for registrants to choose.

- **Automatically closes on:** This will be last day that the session is available onsite for registration.

- **Capacity:** This will set a maximum capacity for your session attendance or ticket type/sponsorship.

- **Enable waitlist:** If you want to set up a waitlist for your session, click “Yes” on this section.
Standard Event Setup: Event Details

Sessions

Move on to fill in details for the next section, “Display Options.”

– Display on agenda: Choose “Yes” if you want the session to display on the agenda page of your event site.

– Display time: Choose “Yes” if you want the session time to display on the agenda page of your event site.

Finally, if your session has a fee tied to it, select “Yes, a simple fee” and input the session fee name and amount.

If you are finished setting up your fee, click the green “Finish” button.
Standard Event Setup: Event Details

sessions

If your sessions are being used as your ticket types/sponsorships because they have a gift component, you will need to be sure to enter the “Value of goods & services” and the “gift portion” to each ticket type.

Also, if you ever need to establish sessions that have their own unique allocation codes and AWA IDs, you have the option of adding them on the session level.

This may come in handy if your main event is broken out into multiple individual events and you need to be able to allow registrants to sign up for multiple events.

R Game Day is a great example. The main event is R Game Day, but registrants need to be able to select multiple individual locations they wish to attend. Each location is set up as a session and has its own unique allocation code and AWA ID.

To enter the custom details outlined above, once you have created your sessions, click the title of each from your main session listing.
Standard Event Setup: Event Details

Sessions

Once you open your session, click on the “Custom Fields” tab at the top. Click to “Edit.”

You will see fields for “Gift Portion,” “Value of Goods & Services,” “Session AWA Event ID,” and “Session Allocation Code” – enter the information in these fields if you have them for your event.

NOTE: entering the gift portion and value of goods and services information here means that you will NOT need to send transmittal forms to accounting for this event. They get all of the details they need from a CVENT report.

Once you are finished entering in the information above, click “Save” and move on to enter in the same details for your next session/ticket type/sponsorship.
When you are happy with all of the sessions that you established for your event, navigate back to your planning steps menu and mark the session item as complete.

Congratulations! You are finished with the “Event Details” portion of your event setup. Now, move on to set up your event website and registration process.
Standard Event Setup: Website & Registration

Website Setup

Navigate to your planning steps menu and select the first item in your website dropdown, “Customize the layout of your event website.”

You should not need to make any adjustments to the “Layout” of your website. This is the tab that you will land on by default, but this has already been customized for you as part of the template that you chose. Instead, click on the tab for “Theme.”
Standard Event Setup: Website & Registration

**Website Setup**

On the “Theme” tab, you will only need to make a few small adjustments.

First, click the green “Edit” button in the upper right corner of the screen. You can adjust the color and style of your registration site’s buttons if you’d like. They will default to grey but you may prefer to use the “magenta” button to match the rest of the site’s color scheme.

Click the “Change Button” button and select “Magenta” if you wish to make this change.

Finally, you may want to adjust the size of the font on your event site. It is defaulted to “Small” but if you think it is difficult to read, you can adjust to “Medium.” Under “Display Options” adjust the dropdown to “Medium.”
When you are finished making your site adjustments, click the green “Save” button in the upper right corner.

Good news! You can now mark two items in your planning steps menu as complete. You have finished both the customization of your website layout as well as visual theme setup.

Next, click “Organize your event website’s pages and add your own content” from your planning steps menu.
Standard Event Setup: Website & Registration

Website Setup

You have the option to turn on/off whatever pages you’d like to build your event website. The default page that will always show is the “Summary” page which is the first in the list. You’ll notice that you do NOT have the ability to delete this page.

You can click the title of any page to make edits, or you can click the eye icon to the right of the page name to preview that page.

You can also use the main “preview” functionality at any time throughout your website/registration setup to view your site/registration process.
Standard Event Setup: Website & Registration

Website Setup

If you want a page to display, make sure that the “Display” button to the right of the page name is showing the green checkmark rather than the red X.

Note that your website pages will automatically pull information that you already set up in previous steps (event details, fees, location, contact information, etc.) so you shouldn’t need to make too many adjustments to whatever pages you want enabled.

You can also choose to create a new page if you’d like one that doesn’t fit into one of the existing categories. To do that, click the blue “Create Page” button in the upper right corner of the screen.
Website Setup

Click on the “Summary” page title to make whatever adjustments you’d like to that page. On the next screen, you can customize each section by adding/removing text or images and choosing the information you want to display.

To make updates to a section, click “Edit Section” to the right of the section title.

To indicate whether or not you want the section header to display, click the button to the left of “Edit Section.”

If you click “Edit Section” it will open the CVENT design editor where you can make your updates. Feel free to work in either “Design” or “HTML” view to make your adjustments, depending on where you are most comfortable.
Standard Event Setup: Website & Registration

**Website Setup**

For more detail about adding images and hyperlinks in the CVENT design editor, as well as a guide to basic HTML code, [click here](#).

You may want to include a map of your event location. If so, simply navigate to the google maps site ([https://www.google.com/maps](https://www.google.com/maps)) and type in your event location in the upper left corner of the screen. Once you select your location, click the share icon in the menu that displays on the left side of your screen.

Click the tab to “Embed map” instead of the share link.
Standard Event Setup: Website & Registration

**Website Setup**

Highlight the entire string of code that opens once you click to embed your map.

Finally, return to your design editor in CVENT. Once you have the editor open, click to view in **HTML** rather than Design.

Paste in the code that you copied from Google Maps. Return to Design view and you should see your map displayed.

The next slide will walk you through the steps above.
Standard Event Setup: Website & Registration

Website Setup
Standard Event Setup: Website & Registration

Website Setup

As a reminder, any time you make a change to any of your event pages, you will need to click the green “Save” button in the upper right corner of the screen. If you are still planning to work on the page after you save, click the blue “Save & Continue Editing” button.

If you scroll down to the bottom of your summary page, you will see a number of event details listed that you can choose to display. These are pulling in from your event details section, which was where you began the setup of your event. Click the “Display” button next to the sections you want to show on your summary page.
Standard Event Setup: Website & Registration

Website Setup

Repeat the same set of steps for each website page you want to enable. The key is to preview often so that you know what your event website looks like, each time you make a change.

Your site navigation will display automatically, depending on which pages you have enabled. Pages in the navigation will display in the same order they are listed on the “Event Website Pages” homepage. If you want to reorder any of your event pages so they show first in your site navigation, click and hold the icon with white dots to the left of your page title. Shift the page up or down to move it.
Standard Event Setup: Website & Registration

Website Setup

Once you are happy with the appearance and order of your event website pages, you can mark it as complete in your planning steps menu.

While you are there, you can also mark “Preview your event website” as complete since you are previewing as you move along throughout the setup process. You will still be able to continue previewing your event, even after marking it as complete in your planning steps menu.
Standard Event Setup: Website & Registration

Website Setup

Next, you can move on to set up your event website for mobile. This is a quick (but important) step to make sure that your event website is easily accessible on a mobile device.

In your planning steps menu, click the link to “Set up your mobile-friendly event website.”

The next page will display a list of all available mobile pages for your site. *Note that only the pages you already enabled to display on desktop will display on mobile.* Don’t worry that all of the pages listed are marked as “Yes” under display. If you disabled those pages when you were setting up your site, they will NOT show on mobile.

You should not need to make any adjustments to the settings on this page, but you can take it as an opportunity to preview your site on mobile to make sure it looks good. You’ll notice that the site looks much simpler on the phone than it does on desktop. That’s OK. The main goal of your mobile site is to move registrants who are using their phone through the registration process as seamlessly as possible.
Standard Event Setup: Website & Registration

**Website Setup**

Once you preview your event website on your phone and you are happy with how it looks, you can mark the mobile website setup as complete in your planning steps menu.

Next, click the link to “Make any necessary updates to your event website’s text” in your planning steps menu. This is a list of the custom text that CVENT inserts for things like button labels, error messages, etc. The only thing on this page that you may want to adjust is the “closed language” for your site that displays once your event reaches capacity or is manually closed.
To find this field, enter the term “closed” in the search bar at the top of the screen. Click the magnifying glass to search.

The second option in the list of returned search results is what displays at the top of your registration website once it is closed. If you are happy with the text, you do not need to make any adjustments. If you want to edit the text to add additional details or different contact email address, click the pencil icon.
Standard Event Setup: Website & Registration

Website Setup

Enter your custom text in the empty field that displays under the “Custom Text” header. Once you are happy with your text, be sure to click the save icon to the left, next to the “Text ID.”

You should not need to make any further adjustments to the website text so you can now mark it as complete in your planning steps menu.
Next, you’ll move on to the “Verify the security and search settings of your event website” section of your planning steps menu.

This is where you can indicate whether or not you want your site to display in search engine results.
Standard Event Setup: Website & Registration

Website Setup

Under “Search Engine Settings” indicate whether or not you want your event to show in search results on Google/Bing/Yahoo (to name a few).

If you do, it is recommended that you include a few keywords and a short description of your event to improve its chances of appearing in search results.
Standard Event Setup: Website & Registration

**Website Setup**

You have the option of gating your website should you need to. The default under “Authentication method for website visitors” will be “None” but you if you want to set a password, click the “Require an event password” radio button. You will then be prompted to enter your password. If you choose this option, just remember that no one will be able to access the site or registration without having the password handy.

The “Registrant Authentication” section is simply a reminder of your event display settings. It is recommended that you set your event to “Public” but if you only want a certain list of registrants to be able to view and register, do not request that your event be displayed on the RUAA calendar. The “Public” setting simply means that there are no restrictions in place for who can register.
Standard Event Setup: Website & Registration

Website Setup

Once you are happy with your event’s security settings, click “Save” and then mark as complete on your planning steps menu.

As a reminder, you can return to these steps at any time if you need to make adjustments. You can also make adjustments to most of your event settings after you launch as well if need-be.
Standard Event Setup: Website & Registration

Registration Setup

The next step is to ensure you are happy with your event registration settings. In your planning steps menu, click the link to “Set up your registration process.”

The next page includes a series of tabs, each with different information and settings you'll need to enable. The next few slides will walk you through each tab and provide details about which settings you should consider adjusting. To begin, click the green “Edit” button in the upper right corner of the screen.
Standard Event Setup: Website & Registration

Registration Setup: Basic Settings

The “Basic Settings” tab includes details about what actions your registrants are permitted to take during their registration process.

You should not need to make many adjustments to the default settings on this page, but feel free to look through them and ensure they all work for your event.

**Important note on modifications:** If your event is free and does not contain a ticket price or donation component, feel free to allow your registrants to modify their registration settings. If you want to include an end date for registrants to make modifications to their registration settings, you can do so by filling in the “Allow modification until” field. If your event contains a fee component, you will need to **DISABLE** the option for your registrants to modify their registration settings. Accounting will handle all refunds manually, so we do not want CVENT to automatically generate a refund, which it does when registrants modify their registration settings (if they change ticket type/session/etc.)

As a reminder, the default for “Cancel Registration” is set to “Disable” because accounting will be handling refunds for all registrant and event cancellations as well.

Once you have confirmed all of your basic settings look good, click the green “Save” button in the upper right corner of the screen and move on to the “Identification & Security” tab. Click to “Edit” on this tab.
Under “Security” you will see your registration options. As a reminder, it is recommended to keep your registration open to anyone (public) but only send the link out to specific invitation lists if your event is private. This is so that registrants don’t get locked out if they are using an email address that differs from the one on the invitation list. You do not need to have your private events listed on the RUAA calendar, so only those to whom you send the link will be able to locate the event website/registration. *Your event invitation emails will not be sent through CVENT. They will be deployed through Marketo.*

You should not need to make any adjustments next to the “Limit registration by” header, however, you do have the option of whitelisting/blacklisting registrants by email domain (gmail.com/hotmail.com/ruf.rutgers.edu to name a few).
Standard Event Setup: Website & Registration

Registration Setup: Identification & Security

Under “Privacy” you can keep the default settings in place.

<table>
<thead>
<tr>
<th>Privacy</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skip identity confirmation for recognized contacts:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-populate the information of registrants who arrive through a public weblink:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registrants can choose whether to be displayed on the Attendees page:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registrants can email each other from Attendees page:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Yes
- No
If you are NOT including the “Attendee” page on your event website (this is the page that lists all others who have registered for the event), adjust the field for “Registrants can choose whether to be displayed on the Attendees page” to “No, the names of registrants and their guests will always be displayed.”

This seems strange, but adjusting to “No” will eliminate the auto-generated question for registrants during the registration process. If you leave the above field set to “Yes,” registrants will have to choose whether or not their names should be displayed even though you are not including an Attendee page.
You can leave the “Registrant Identification” settings as they are, unless you would like your registrants to enter their email address in twice for verification purposes. If you want the extra email address field, choose “Yes” for “Email address must be entered twice.”
Standard Event Setup: Website & Registration

Registration Setup: Identification & Security

If you would like to set the ability for an administrator to register on behalf of someone else, you can set the field for “Allow registration on behalf of someone else” to “Yes.”

You can then designate who will receive the confirmation emails (the admin, the registrant, or both).
Under “Registration Type Selection” you can adjust the settings for how a registrant will choose their registration type. As a reminder, the registration types were set early on in the setup process. If you have various registration types (alumni, faculty, sponsor, etc.) you should allow for the registrant to choose his/her registration type. If you have customized your fees by registration type, you can choose whether or not to make the “Registration Type” field required.
If you have registration types and are asking your registrants to select one when they register, you will need to add all of the registration types that you want to display by clicking the “Add Registration Types” button and indicating those you want included. Once you have them all selected, click the green “OK” button.
Registration Setup: Identification & Security

When you are happy with all of your Identification & Security settings, remember to click the green “Save” button in the upper right corner of the screen.

Click on the “Contact Fields” tab to move onto the next step.
Standard Event Setup: Website & Registration

Registration Setup: Contact Fields

The contact fields tab includes all of the questions your registrants will need to answer before submitting their registration.

The list of default questions includes:

- First Name (Read-Only and is included on the registrant identification page)
- Last Name (Read-Only and is included on the registrant identification page)
- Email Address (Read-Only and is included on the registrant identification page)
- School (Includes all schools by default and is listed as required)
- Class Year (Includes all class years by default and is listed as required)
- Home Address (Listed as an optional field)
- Home Phone (Listed as an optional field)
Standard Event Setup: Website & Registration

Registration Setup: Contact Fields

If you need to make any adjustments to any of these fields, click the green “Edit” button in the upper right corner of the screen.

You have the option of deleting School/Class Year/Home Address/Home Phone but you cannot remove or un-require First/Last Name or Email Address as these are part of the registrant identification process.

You can also choose whether or not you want School/Class Year/Home Address/Home Phone to display as required or optional.

If you want to include a new field that isn’t listed by default, click the “Add Field” button under “Custom Information.”
Standard Event Setup: Website & Registration

Registration Setup: Contact Fields

If you don’t see the field or question you need in the list of custom fields, don’t worry. You will have the opportunity to add additional questions during the next step of your registration setup.

When you are happy with all of the fields listed and their settings, click “Save.”

Next, click on the “Guests” tab to enter in details and settings for your registrants to invite guests to your event.
Standard Event Setup: Website & Registration

Registration Setup: Guests

On the guests tab, you can adjust the settings for the details your registrants will need to fill out for their guests.

Click the “Edit” button to begin making your adjustments.

You can begin by selecting whether or not guests are permitted at your event. If you select “No” you are already finished with the adjustments needed on this tab and you can move on. If you select “Yes” you can continue on to fill in the additional details.
Standard Event Setup: Website & Registration

Registration Setup: Guests

Under “Basic Settings” you can adjust any limitation to the number of guests permitted at your event, whether or not there is a fee for guests to attend, where your registrants will enter in guest information, and whether or not guests should also have a registration type (alumni, faculty, sponsor, etc.).
Standard Event Setup: Website & Registration

Registration Setup: Guests

If you select “Yes” or “Yes, and they are required” for the “Guests can have registration types” field, you will need to select which registration types can be assigned to guests in the list below.

You can then move on to fill in/adjust any of the fields under “Advanced Settings” below as necessary.

<table>
<thead>
<tr>
<th>Advanced Settings</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitees must provide personal information about their guests during initial registration:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Note: Personal information about guests must always be provided for modified registrations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invitees can select guests from their related contacts:</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Add new guests to this:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accepted registrants can also be added as guests:</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Registrants’ guests can also register on their own:</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
Finally, under “Guest Fields,” you can select which fields you want to show when registrants are entering guests. First and last name of guests are always required, but you have control over which additional fields display and whether or not they are optional or required.

You can also click the “Add Field” button if you want any other custom field(s) to display specifically for guests.

Under “Guest Emails” you can designate who should receive email notifications (guests, primary registrants, or administrators [if the “register on behalf of someone else” setting is enabled]).

When you are happy with your guest settings, be sure to click “Save” before clicking the “Item Selection” tab.
On the item selection tab, you can adjust what displays during the registration process for the sessions that you enabled. If you don’t have sessions, there isn’t much you need to do on this tab.

Under “Display Options” you can adjust whether or not you want the admission item and session descriptions that you entered earlier to display. If your admission items/sessions have a maximum capacity, you can indicate whether or not you want that capacity to show as well (it can show either by total capacity or capacity remaining).
Standard Event Setup: Website & Registration

Registration Setup: Item Selection

Under “Admission Items” you can choose whether or not you want the admission item name to display while the registrant is selecting sessions. You can also choose whether or not you want registrants to be able to click a link to “View Sessions” that are associated with each admission item. The sessions will display in a pop-up window when the registrant clicks the “View Sessions” link.
Finally, you can adjust your session settings.

- Indicate whether or not your registrants can select sessions that overlap.
- Keep the format for your sessions in “Simple” mode instead of “Agenda Builder.”
- Choose how you would like the order of your sessions to be determined.
- Indicate whether or not you want the session dates, categories, and locations to display.
Standard Event Setup: Website & Registration

Registration Setup: Item Selection

Note that at any point during your setup, you can preview your site and registration process so that each time you make a change and save, you can refresh your preview link to make sure that the change is displaying correctly and to your liking.

Once you are happy your item selection settings, click “Save” and navigate to the “Confirmation” tab.

You should not need to make any adjustments to the “Summary & Payment” tab so we can skip over that section.
Standard Event Setup: Website & Registration

Registration Setup: Confirmation

Once you navigate to the “Confirmation” tab, click to “Edit.”

On this tab, you can set what fields you want to display on your registration confirmation page.

There are display options for your entire event as well as for the sessions the registrant chose, so be sure to scroll all the way down and make your selections for everything on this screen.

If you have any questions about what specific field displays, please submit the CVENT support request form for assistance.

When you are happy with your confirmation display settings, be sure to click “Save.”

You are now finished with your registration process setup and you can mark it as complete in your planning steps menu.
Good news! You should not need to make any adjustments to the next item in your planning steps menu (Choose which information to display on your registration pages). Any fields that you already disabled during setup should not show on your site so you can also mark this step as complete in your menu. Just be sure that when you preview your site, you keep an eye out for any fields or questions that you do not want displayed so you can adjust as necessary.

Instead, you can move on and click the link to “Create questions for your invitees to answer when they register.” This will come in handy if you were not able to locate of all your desired registration fields/questions in the previous section.
Standard Event Setup: Website & Registration

*Additional Registration Questions*

You have the option of creating additional questions for your registrants to answer during registration. These questions can be general (applied to everyone who registers), OR displayed to only those who choose a specific admission item or session. Before you craft your questions, be sure that you are on the correct tab, depending on where/how you want your question to display.
Standard Event Setup: Website & Registration

Additional Registration Questions

You can begin by selecting the type of question you want to include from the “Question Tools” editor. If you aren’t sure what each question type looks like, you can hover over each question option to see an explanation pop-up.
To add a new question, click and drag the question type you want into the canvas area or click the (+) sign next to the question type.

After you add a new question type, you will be able to update your question text and answer choices, if applicable. You’ll also be able to designate whether the question should be required or not, and if the question should display for registrants and guests, just registrants, or just guests.

In the question settings section, you can include an abbreviated question name to display internally in your event report to keep it short, streamlined, and clear.

*The next slide is a video demonstration of adding a new question for your registration.*
Standard Event Setup: Website & Registration

Additional Registration Questions

To get started, drag a question to the canvas, or click the plus sign next to a question.
Standard Event Setup: Website & Registration

Additional Registration Questions

You can add header text, a separator rule, or custom HTML to your registration questions by switching to the “Design Elements” view and inserting one of the three options.

As a reminder, you can (and should) preview your site often to make sure that your formatting and questions are displaying as you want them to.
Standard Event Setup: Website & Registration

*Additional Registration Questions*

Once you are happy with your additional registration questions (and have completed setup for your general, admission item, and session questions) you can mark as complete in your planning steps menu.

You have the option to also set up questions that only display internally, which may come in handy if you need to register for an attendee in admin mode. You can include notes about the registrant that will display in reporting but will NOT be visible onsite. If you want to set up these questions, click the “Add any necessary internal questions and fields for your invitees” link in your planning steps menu. Otherwise, you are ready to begin “Promotion & Communication.”
Standard Event Setup: Promotion & Communication

**Social Sharing**

The first step in the “Promotion & Communication” section is setting up your event so that it can be shared on social media.

On the social media page, you will only need to worry about making updates to the “Sharing” tab. Click “Edit” in the upper right corner of the page.

On this page, you can include an event image that will populate when the event is shared on social media, as well as a post title and post text. When users on social media click on the post title, they will be directed to the event summary page. If you don’t have an image that you think will work well for social, you can remove the image altogether so just the text displays. To remove the image, click the (X) to the right of the default CVENT logo.

The next section includes fields that are specific to Twitter. You can customize your Twitter event message and even create an event hashtag that will automatically display.
Standard Event Setup: Promotion & Communication

Social Sharing

You can choose whether or not you want to display a share bar on your event website so that registrants can share details about the event no matter what page of your site they are on.

Finally, you can indicate whether or not you want a social share prompt to display after a successful registration. The prompt will display in a pop-up immediately following registration. You have the ability to customize the text included in this prompt.
Standard Event Setup: Promotion & Communication

Social Sharing

When you are finished with your social share settings, make sure that you click “Save.” You can then mark your social share settings as complete in your planning steps menu.

Next, move on to establish your auto-generated confirmation emails to be sent to registrants and event admins. Click the link to “Set up your invitation, confirmation, and reminder emails.”
Standard Event Setup: Promotion & Communication

Event Confirmation Emails

The next screen will allow you to choose which event emails you want configured. As a reminder, you’ll be handling invitation emails through Marketo, and will need to handle all cancellations manually, so you will only want to enable your event’s registration and modification confirmation emails (ONLY enable modification emails if your event does NOT carry a fee component).
Standard Event Setup: Promotion & Communication

Event Confirmation Emails

Start with your “Modification Confirmation” email. This deploys automatically if the registrant makes any adjustments to their existing registration settings. As a reminder, you only need to worry about this email if your event does NOT carry a fee. Modifications will be handled manually for all fee-based events.

If your event is fee-based, you can follow the same steps below but only for your “Registration Confirmation” email.

You will land on the “Details” tab, which includes the subject line that will deploy for the email. ({{E-TITLE}} is the event title that will pull in automatically), as well as the from name of the email. This automatically pulls in the planner first and last name that you set up initially.

If you want to make any adjustments to the settings on this tab, click the green “Edit” button in the upper right corner of the screen.
Standard Event Setup: Promotion & Communication

Event Confirmation Emails

![Modification Confirmation](image-url)
Once you are happy with your email details, click on the “Content” tab to set up the body of your email.

The good news is that this section automatically populates with standard registration details, so you shouldn’t need to make too many adjustments.

**Important:** You should be sure to include instructions about the *specific email address* to which you’d like registrants to send any questions. **We do not want them to reply directly to the confirmation email,** as it will not wind up in the correct inbox.

You can also customize the “thank you” message that is included in this email if you’d like. Simply click the green “Edit” button, and begin typing what you’d like to include in the email.
Recommended instructional text for emailing with any questions or concerns:

If you have any questions about the event or your registration, please send an email directly to [INSERT EMAIL ADDRESS]. Please do not reply directly to this email as the inbox is not monitored and your question will not be received.

The next slide will demonstrate how and where to insert the text above.
Standard Event Setup: Promotion & Communication

Event Confirmation Emails

```
Dear {{C-FIRST NAME}},

Your registration has been modified. Please save this email for future reference.

Event: {{E-TITLE}}
Attending: {{C-FIRST NAME}} {{C-LAST NAME}}
Number in Party: {{C-NUM INVITEE}}
Time: {{E-START TIME}}
Date: {{E-START DATE}}
Location: {{E-LOCATION}}
Address: {{E-ADDRESS}}
Confirmation Number: {{C-CONFIRMATION NUM}}
Current Registration: {{C-CURRENT REGISTRATION}}

{{C-PASSBOOK}}
{{E-EMAIL LINK}}

Sincerely,
{{P-FIRST NAME}} {{P-LAST NAME}}
{{P-EMAIL}}

If you no longer want to receive emails from {{P-FIRST NAME}} {{P-LAST NAME}}, please {{EMAIL OPT OUT}}
```
Standard Event Setup: Promotion & Communication

**Event Confirmation Emails**

```plaintext
Dear {{C-FIRST NAME}},

Your registration has been modified. Please save this email for future reference.

If you have any questions about this registration, please send an email directly to melissa.rodenbach@ruters.edu. Please do not reply directly to this email as the inbox is not monitored and your question will not be received.

Event: {{E-TITLE}}

Date: {{E-START DATE}}
Time: {{E-START TIME}}
Location: {{E-LOCATION}}

{{C-CURRENT REGISTRATION}}

Confirmation Number: {{C-CONFIRMATION NUM}}

Sincerely,

{{P-FIRST NAME}} {{P-LAST NAME}}
{{P-EMAIL}}
```

- **Event Title**
- **Event date/time/location**
- **Registration details**
- **Planner first/last name and email**
Once you are happy with the content included in your modification confirmation email, click the tab for “Advanced Settings.”

Click the green “Edit” button in the upper right corner of the screen.

Adjust the “Send an additional copy of this email” setting to “No” – you will enable your admin confirmation email in the next step.
Standard Event Setup: Promotion & Communication

**Event Confirmation Emails**

The final tab is for the email “Preview.” This is a nice way to see (generally) how the email will look when it reaches the registrants.

Under “Content Analysis” you should not ever see a high risk score, but if you do, please submit the CVENT support request form for assistance.
Standard Event Setup: Promotion & Communication

**Event Confirmation Emails**

When you are happy/finished with your modification confirmation email, click the “Close” button in the upper right corner of the screen, and move on to make the same adjustments for your “Registration Confirmation” email and your “Guest Registration Notification” email.

You can follow the same steps you took for the modification email to set those up.
Standard Event Setup: Promotion & Communication

Event Confirmation Emails

Once you are finished with your registrant confirmation emails, you can move on to enable your admin notification email. This will deploy to a list of your choosing each time a new registration is completed.

First, mark the “invitation, confirmation, and reminder emails” section as complete in your planning steps menu.

The navigate to “Set up email alerts for your event planners and organizers.”
Standard Event Setup: Promotion & Communication

Admin Confirmation Emails

Click on the link for your “Registration Admin Email” to open the email settings. Click “Edit.”

Under “Recipients,” adjust the dropdown menu from “Account User” to “Email Address” and enter your admin’s email address in the “Recipient” box to the right. You only need to click “Add Recipient” if you are adding more than one to the list. **When finished, click “Save.”**

**Note that if your event carries a fee, you must** include a Foundation staff member’s email address in order for the fee to be properly recorded by accounting.
Congratulations! You completed the final step of your event setup. Mark “Set up email alerts for your event planners and organizers” as complete in your planning steps menu.

You are now ready to begin testing your event.
Standard Event Setup: Testing

In your planning steps menu, under the “Website & Registration” header, click the link to “Move the event to Test Mode and perform (or send) tests.”

On the next screen, click the green button for “Move to Test Mode” and then select “Confirm & Perform Test” on the pop-up.
Standard Event Setup: Testing

You will return to the event overview page. In the navigation bar along the top of the screen, hover over “Event Details” and click the “Event Status” link under the “General” header.

On the Event Status page, click the “Actions” dropdown and choose the link to “Perform Test.”
Standard Event Setup: Testing

On the test setup page, select the following settings:

- **Method**: Test the event myself
- **Area**: Website
- **Test for invitees who arrive from**: Weblink
Standard Event Setup: Testing

Click “Start Test” in the upper right corner of the screen.

Make sure that you have popups enabled as the test link will open in a new window.

You can share the URL for your test with any others you’d like to complete the test registration.
If your event is paid, and you want to test a credit card transaction to make sure it submits successfully AND to test your confirmation page and email, you can use the following test credit card numbers:

**Visa** - 4111111111111111 (Use any 3-digit number for the Card Security Code)

**Mastercard** - 5555555555554444 (Use any 3-digit number for the Card Security Code)

**American Express** - 378282246310005 (Use any 4-digit number for the Card Security Code)

The Expiration Date can be any date in the future.
Standard Event Setup: Launch!

Once you are happy with your event testing, and have given your “Planning Steps” one last look, you are ready to set your event live.

Click here for a list of items you may want to consider double checking before you set your event live.

Back on your event overview page, click the “Launch Event” button in the upper right corner of the screen.

**IMPORTANT NOTE:** Depending on your access level in CVENT, you may NOT see the “Launch Event” button. If you do not see the “Launch Event” button, you will need to submit the CVENT support request form for launch assistance.

. Please provide your *event name and event date* so it can be located quickly.
You’ll want to delete all contact information that was collected during testing.

Once you confirm, your event will officially launch. Well done!

As a reminder, your event link is located under “Promotion & Communication” in the navigation bar. You can view and copy it to include in your Marketo email invitation(s).
Now that your event is live, you will need to send a quick email to notify:

- **Accounting**: It will help accounting to know the event is live just in case they have any questions or concerns once transactions begin coming in.
  - Email Deanna Walker McDonald: dw367@ruf.rutgers.edu

- **Communications**: If your event needs to be included on the RUAA site event calendar, this process is still handled by Communications. Please allow 3 business days for completion.
  - Please [submit the CVENT support request form](#) for assistance
Pulling an Event Report

For all events you set up in CVENT, you have access to a number of available reports, both with and without financials. To access, click on the title of the event you are looking for from the events homepage.
Pulling an Event Report

To locate reporting on a standard event, hover over the “Reporting” tab and select “Standard Reports.”
Pulling an Event Report

To locate reporting on an express event, click on the reporting tab under the title of your event.
Pulling an Event Report

The next screen is a list of all available report types for your event. There are a large number to choose from, and you can click the (+) icon next to any report title in order to see what is included in that particular report.
Pulling an Event Report

The reports you will want to start with are the following:

• **Other Financial Reports** (you will only see this report type listed if your event has a paid component)
  - **Registrant Ad Hoc with Financials**: This report provides details broken out by attendee, and has the potential to include all of your registration fields, as well as their payment information.

• **Registration Reports**
  - **Registrant Ad Hoc**: This report provides a breakdown (without financials) of all individual registrants, guest information, registration date, registration type, etc.
Pulling an Event Report

Once you select the report you want to run, fill in the appropriate fields on the following screen.

**Start/End Date** – This will designate which registration dates you want included in your report.

**Select Registration Items** – If you have more than one admission item (ticket) to your event, you can select which you want to include in your report.

**Registration Survey Questions** – If you have included additional questions as part of your registration, this is where you can indicate which (if any) you want in your report.
Pulling an Event Report

Under Select Additional Contact Fields, you can indicate which available fields you want pulling into your report. Note that not all registrants will have all of this data in their account so many columns will likely pull in blank.

To add a new contact field or custom contact field, highlight the ones you want in the “Available” box on the left and click the “right” arrow to move them over to the “Selected” box. To select more than one at a time, press and hold your “Ctrl” button on your keyboard.
Pulling an Event Report

When you are ready to run your report and are happy with the data you’ll be receiving, click the green “Run” button in the upper right corner of the page.

After you run your report, you have the option of saving it so that you can easily find/run the same report again in the future. You can also export the report to an Excel document for greater analysis.
Manually Registering an Attendee

As a CVENT administrator, you have the ability to register a new attendee from the CVENT platform.

Locate your event on the “Event Homepage” and click the event title. Locate the “Invitee Management” section – it will either be a tab for express events or a navigation item for standard events. If in the navigation bar for a standard event, hover over it and select “Register Invitee” under the “Quick Action” header.
Manually Registering an Attendee

For express events, click the green “Register New” button, and follow the steps to select which admission item the registrant should receive, as well as the quantity.
Manually Registering an Attendee

Fill in the registrant’s details on the following screen – these questions are the same ones you ask registrants to fill in when they are registering on their own. Be sure to fill in all information that is required for your registrants, even though the fields don’t show as required on the planner side.

Click “Next.”
Manually Registering an Attendee

Adjust the amount due, if applicable. You can choose to make adjustments to what you charge this particular registrant and provide them with a discounted price or complimentary registration.

Finally, choose how to handle the payment.

- **No Payment** finalizes registration without processing a payment or refund.
- **Offline Payment** records an offline payment immediately upon clicking Finish.
- **Online Payment** processes a credit card transaction immediately upon clicking Finish.

Check the box near the bottom to send a confirmation. To complete registration, click Finish.

[Click here for a useful CVENT guide for manually registering attendees.](#)
Closing an Event Early

If you set up an event that has a capacity, and that capacity is reached, your event will automatically close and will no longer allow registrations to take place.

However, there may be instances when you need to close your event earlier than anticipated, even if your original set capacity has not yet been reached.

To begin this process, navigate to the Event Homepage, and locate your event in the list. Click on your event title and you will be taken to your event overview page.

You will see the button to “Close Registration” under the “Current Status” header. Click the button to close.
Closing an Event Early

Note that your event website link will still be active, but there will be no option to register. CVENT will automatically add language to the top of your event website to notify site visitors that the event is closed.

You have the option to reopen registration at any time if you manually closed earlier than expected. If your event closes because capacity was reached, you will need to adjust your capacity should you have more space you can fill.
CVENT Refund Procedure

If a user cancels his/her registration, or an admin cancels an entire event, CVENT automatically refunds the registrant(s). We do **NOT** want this to happen.

Accounting will manually process all refunds should an event need to be cancelled or a registrant request a refund. Please note that accounting will ONLY refund event registration fees. **Gifts cannot be refunded per IRS guidelines.**

During the event setup process, we already disabled the option for registrants to modify/cancel their registration automatically, so now we need to ensure we **do not cancel the event** as administrators.
CVENT Refund Procedure

Should you need to cancel an event, follow the steps below.

• Visit your event “Overview” page and click the button to “Close Registration”

• Visit your “Event Details” page (this is the page that lists all of your event information; title/date/location/time/planner information/etc.)

• Adjust the “End Date” and “Archive Date” so they are in the past.
Finally….

- Pull a report of all current attendees and email them separately to notify them that the event is cancelled.
- Email accounting with the list of attendees so that refunds can be processed manually.
- Please submit the CVENT support request form to notify that the event is cancelled so that it can be removed from the RUAA event calendar.

Should you have any questions on cancelling an event, please submit the CVENT support request form for assistance.
CVENT Event Participation

CVENT allows you to easily track event attendees as having participated, for reporting purposes.

For both Express and Standard events, navigate to the “Invitee Management” section.
CVENT Event Participation

Next to the name of each registrant, you will see a dropdown menu that includes the option to “Mark as an Event Participant.” You can do this if/when the registrant attends the event.

Once you mark someone as an event participant, they will be listed as “Yes” in the “Event Participant” column in CVENT.
CVENT OnArrival App

Your CVENT account also allows you access to the “OnArrival” app which can be used to quickly and easily check in registrants onsite at your event.

Note that the app is only available for iOS devices at this time.

You can visit this link to view the OnArrival app in the iTunes store or search for “OnArrival” in the iTunes store.

Click here for an overview of how to use the OnArrival app at your events.

Important note: You can use the OnArrival app to manually enter registration details for onsite registrants, but you may not use your iPhone/iPad to process credit card payments through the app. Instead, the Foundation offers wireless credit card terminals that are approved for travel to be used to process onsite payments. If you would like to request the terminals for use, or have questions or concerns, please email accounting at dw367@ruf.rutgers.edu. If onsite registrants can access the event site from their own personal device, they can certainly complete the registration on their own as an alternative.
Event registrant/participant data uploads from CVENT into AWA happen automatically. Each night, AWA records are updated with registration status for all events, regardless of status (active/closed/completed).

What if the email address in CVENT doesn’t match the preferred in AWA?

As part of the data import, there will be a matching process that takes place automatically against any/all information we have on the record in AWA (name, address, school, class year, etc.). This should work for the vast majority of records, though there may be some that are not matched/updated if no matching criteria is found. IT will develop a report that identifies those who were not matched to be able to run a manual check.

How do I ensure my event registration/participation data gets uploaded?

*Your event will need to have an assigned AWA event ID and that ID will need to be in place within your event in CVENT.*
Adding Registration/Participation Data into AWA

How do I ensure my event has an AWA ID assigned?

As a reminder, anyone creating a new event in CVENT should be filling out the “New Event in CVENT” form, which notifies IT to set up your AWA event ID. If your process is to post your events on the FCC calendar, this will suffice as well to have your AWA event ID set up. IT is checking both processes (FCC upload and the form) to ensure there are no duplicate IDs created for any one event.

Will this process work retroactively for completed events?

Yes! The great part about this process is that it will be run for previously completed events as well as live events. So if you did not already have your registration/participation data uploaded for your event, it will be taken care of when the process launches. If your event already had participation data uploaded, nothing will change.
Congratulations!

Congratulations and thank you for reviewing the CVENT User Guide. Should you have any questions or concerns, or to schedule a 1:1 training session, please submit the CVENT support request form for assistance.

Best of luck planning your events!