UNIVERSITY OF SAN FRANCISCO | Office of Marketing Communications

Cvent Express Training Guide

Event Creation at USF

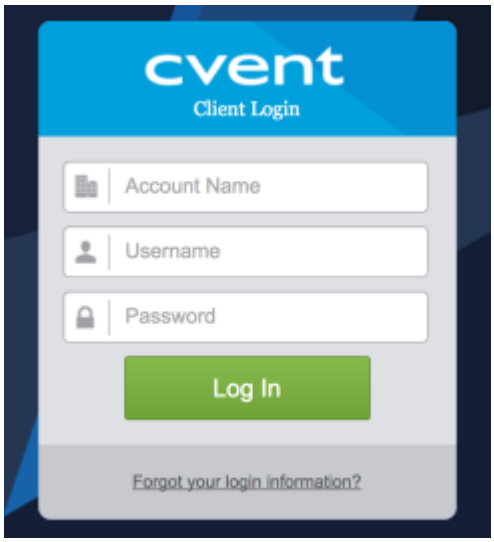
Cvent is the designated university enterprise event registration system that must be used for all paid events and events with a donation component. This system ties directly into other university systems such as CASHNet (payment processing gateway) and Salesforce (contact data), which enables us to follow established university accounting and constituent contact storage procedures.

This guide outlines how USF event creators will build express event registration forms using Cvent. If you have any questions, email ecommunications@usfca.edu

What You'll Need to Build an Event

- Event details
- Event planner contact info (name, email, etc.)
- Imagery/graphics (edited to appropriate dimensions and file size)
- FOAPAL string, or appropriate GL code (paid events only)

Logging In



1. Open your browser and go to: https://app.cvent.com/subscribers/Login.aspx

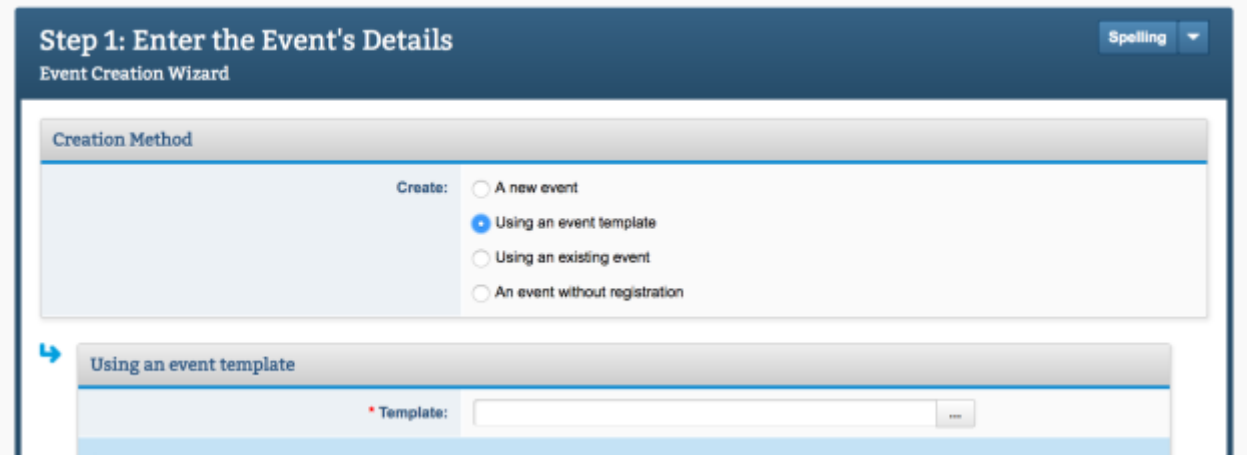
2. Enter **UNISFCA001** in the Account Name field, and add your assigned username and password. Email ecommunications@usfca.edu if you are unsure of your username or password.

3. Select Log In.

Creating an Event

1. Select Create Event icon. 

2. Create your event using an event template, or choose an existing event as a starting point.



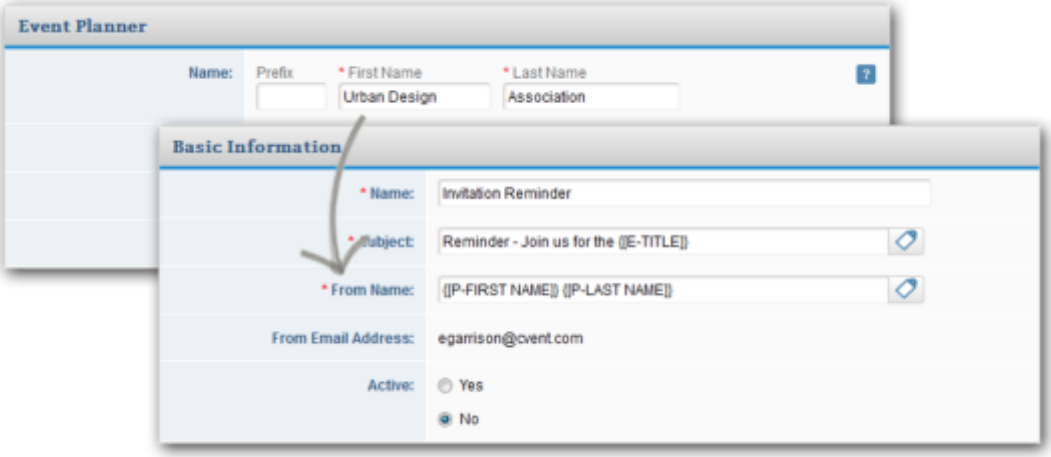
3. Specify key event details.

A. Name your event, select a category, and add your event's description.

B. In the Registration section, set event capacity.

C. In the When section, set the time zone to match the venue's. Select the dates and times. The Registration Deadline is the last day invitees will be able to register.

NOTE: Your event will close automatically when it reaches capacity or the Registration Deadline passes.

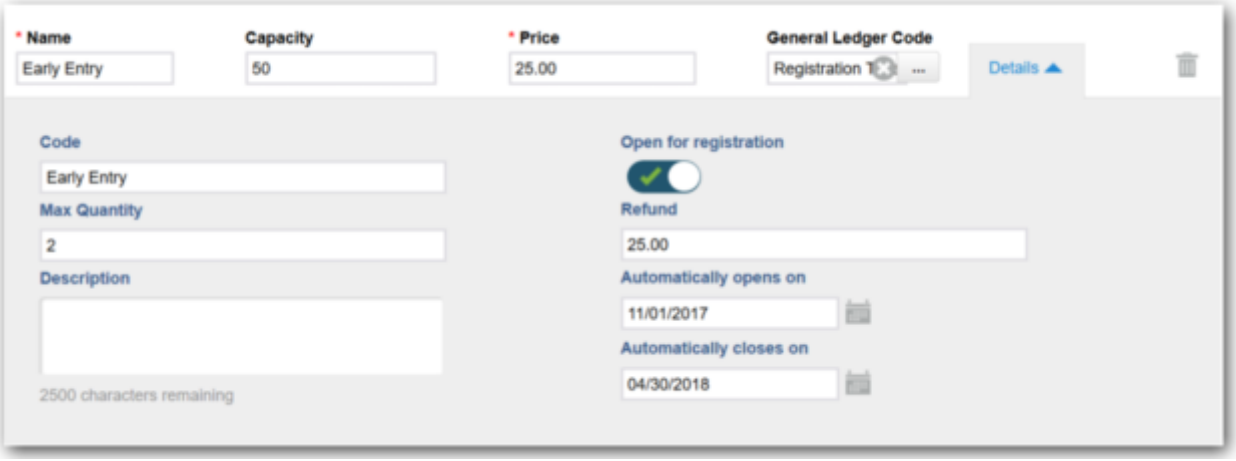


D. In the Event Planner section, enter the planner's first and last name. This will appear by default in the From Name field of event emails by way of data tags.

E. Add free or paid tickets.

Scroll down to the Registration Items section, and click Add Free Ticket. Name the ticket, then set a capacity.

If limiting how many tickets an invitee can select, enter a Max Quantity in the field. You can also limit when this ticket is available. Simply enter an "Automatically closes" date. If you leave these fields blank, the tickets will become available when you launch the event and close with the registration deadline.



Or add a ticket with a fee. Scroll down to the Registration Items section, and click Add Paid Ticket. Name the ticket, then establish the capacity. Enter the price, then select the appropriate general ledger code.

Note: If you do not see your event's GL code listed as an option, please email ecommunications@usfca.edu with the event's FOAPAL string and the ecommunications team will manually add the GL code.

If limiting how many tickets an invitee can purchase, enter a Max Quantity in the field. Enter a refund amount if you plan to refund cancellations. You can also limit when this ticket is available. Simply enter an "Automatically opens" and an "Automatically closes" date. If you leave these fields blank, the tickets will become available when you launch the event and close with the registration deadline.

4. Click finish.

NOTE: You can change anything you've created during the wizard later. This is just the start.

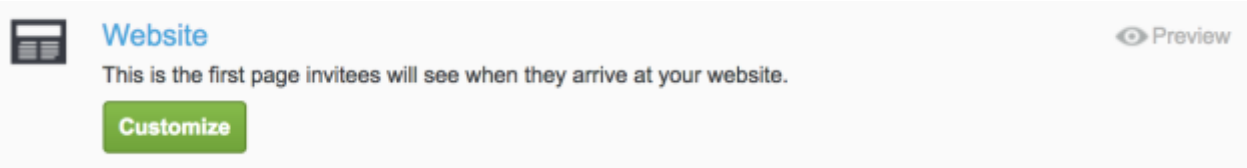
Customizing Your Event

1. Update the registration items and payment options.

Begin by selecting your event. The Overview tab opens by default. Click the neighboring tab, Event Details, then Edit. Scroll down to the Registration Items section. To add or customize any item details, click Details and update the info.

2. Customize the website and registration process.

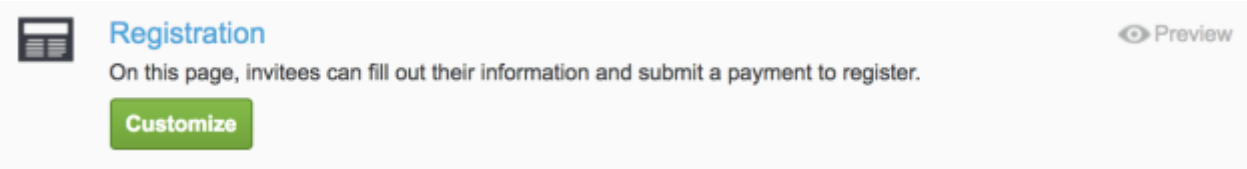
Click the neighboring tab, Website & Registration. Click Customize next to Website.



Click and drag widgets and content from the Design Tools sidebar onto the page.

When you hover over something you just added, options may appear to edit text, adjust settings, or remove the element entirely.

Repeat these steps to update the Registration page.



Click and drag fields, questions, widgets, and content from the Design Tools sidebar onto the page.

Note: You can preview your work at any time by selecting the preview icon.

3. Create a vanity URL.

In the Promotion & Communication tab, select the 

icon and enter the trailing event name (e.g. *rsvp.usfca.edu/trailing-event-name*).

Note: To remain consistent with SEO best practices, separate the event name using dashes in the vanity URL (e.g. /trailing-event-name).

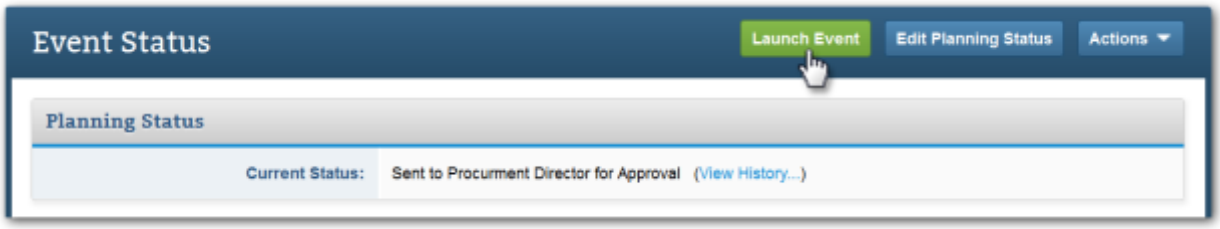
4. Tailor your confirmation emails.

In the Promotion & Communication tab under Event Emails, you have the option to set up the following types of automatic emails:

- Event Reminder (confirmed registrants only)
- Modification Confirmation
- Registration Confirmation
- Cancellation Confirmation
- Regret

To edit content for these messages, select the email type and click edit.

Launching Your Event



Before you launch, take full advantage of Test Mode. Upon clicking Launch Event, the event will be moved to Active status and all test registrations will be removed.

You can now process online payments and send scheduled emails. Admission items, sessions, optional items, tracks, and any associated fees can no longer be deleted. However, you can prevent them from appearing during registration by deactivating them.

1. Access the Event Status page. Begin by selecting your event. Hover over Event Details and, under General, click Event Status.
2. Activate your event. Click Launch Event.

Note: Initially, event creators will not have access to independently launch events. If you do not have access to the Launch Event button, email ecommunications@usfca.edu *and we will review and launch the event on your behalf.*

Event Reports

To run an event report, click on the Reports tab and select from following Report Template categories:

- Registrant Status Reports
- Registration Reports
- General Event Reports
- Referral Reports
- Email Reports
- Click-Tracking Reports
- Payments and Credits Reports
- Transaction Reports
- General Ledger Reports
- Other Financial Reports

After you run a report, you can save it for easy access moving forward.