cvent

ONBOARDING CHECKLIST

ACCOUNT SETUP

Log into your account from the Cvent Welcome Email

Input credit card details when prompted - Adding and Updating your Credit Card on File

Save the Cvent Customer Care Support Line - They can be reached 24/7 at 866-318-4357

Add any additional users to your account - Managing Event Users and User Roles

Add any account email addresses you want your Cvent emails to come from - Adding or Removing Account Email Addresses

Charging fees in your account? Set up your merchant account

- If you have an existing merchant account with a 3rd party payment processor (Stripe, Authorize. net, etc.) please refer to this guide. From here, please find the payment gateway that you will be using. Each gateway has a corresponding guide/info packet on how to get that set up to use with. If you are using Cvent Payment Services instead, follow these instructions.

Get started on your assigned training

ENGAGE

Log into Cvent Community

Visit Community Welcome Center

Subscribe for Product News to get notifications on new product updates and releases

Review **Resources to Help You Throughout Your Journey**

Join the Cvent Beginners Community User Group

EXPERIENCE

Complete your assigned training

Review **Getting Started Articles**

Review **Product Specific Getting Started Articles**

Browse additional available trainings and certifications

ELEVATE

Get involved and grow with Cvent (Become a Cvent Celebrity, Register for the Quarterly Product

Updates, Become Cvent Certified, Listen to Great Events Podcast, etc.)