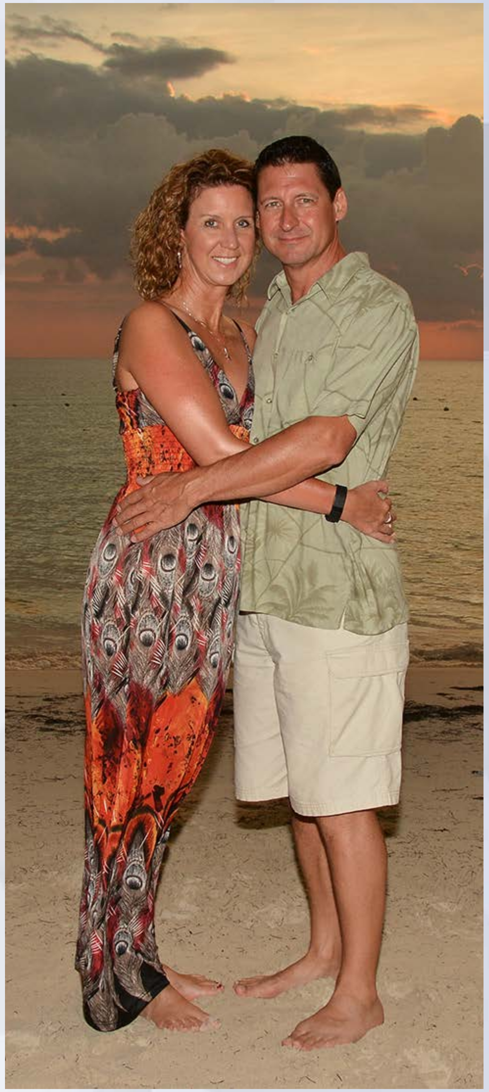
Cvent & Salesforce:
Teamwork Makes the Dream Work

Lori Wildman | DMA – DuCharme, McMillen & Associates

CVENT CONNECT™

About Me

- Lead the Marketing Team for DMA
- 15+ Years in Marketing
- Background in Technology
- Small Teams and “One Man Show”
- First Time on the Vegas Strip



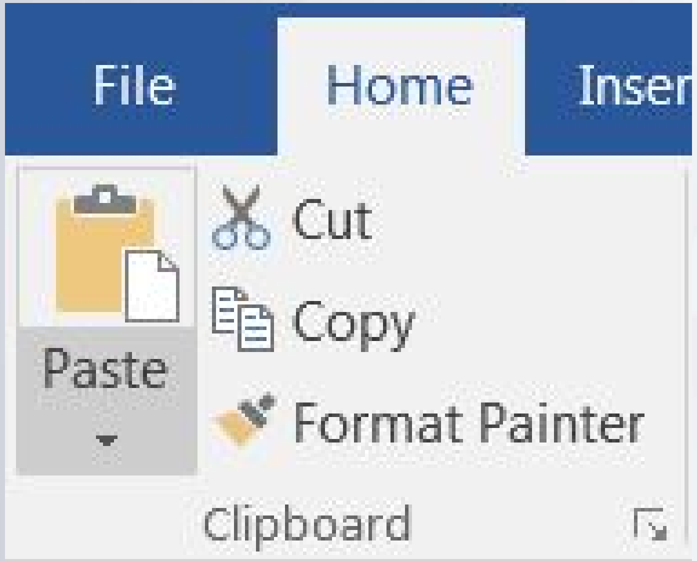
About DMA®

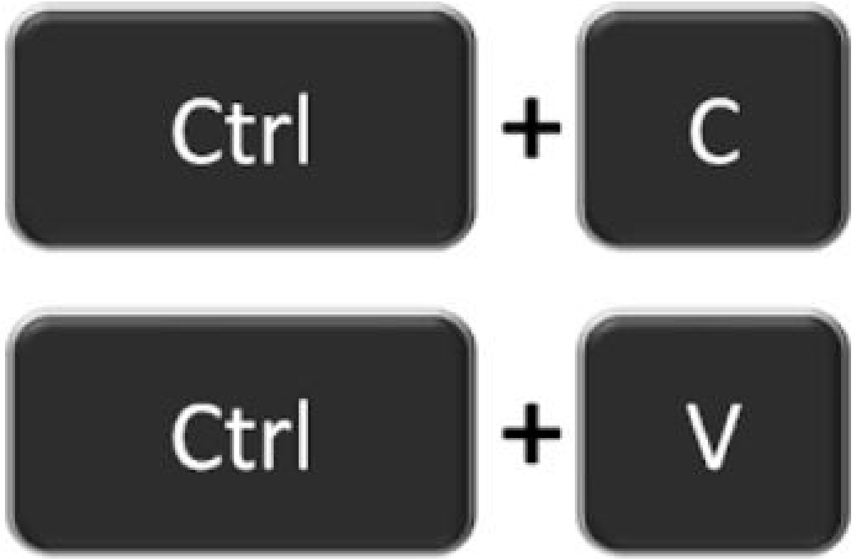
- DuCharme, McMillen & Associates, Inc.
- Tax Consulting Firm Established in 1972
- ESOP for almost 25 years
- Fortune 1000 clients across U.S. and Canada
- State Income, Property, Sales/Use, Tax Technology
- DMAinc.com

80/20 Rule

80% of people will only use 20% of software features

Which Are You?





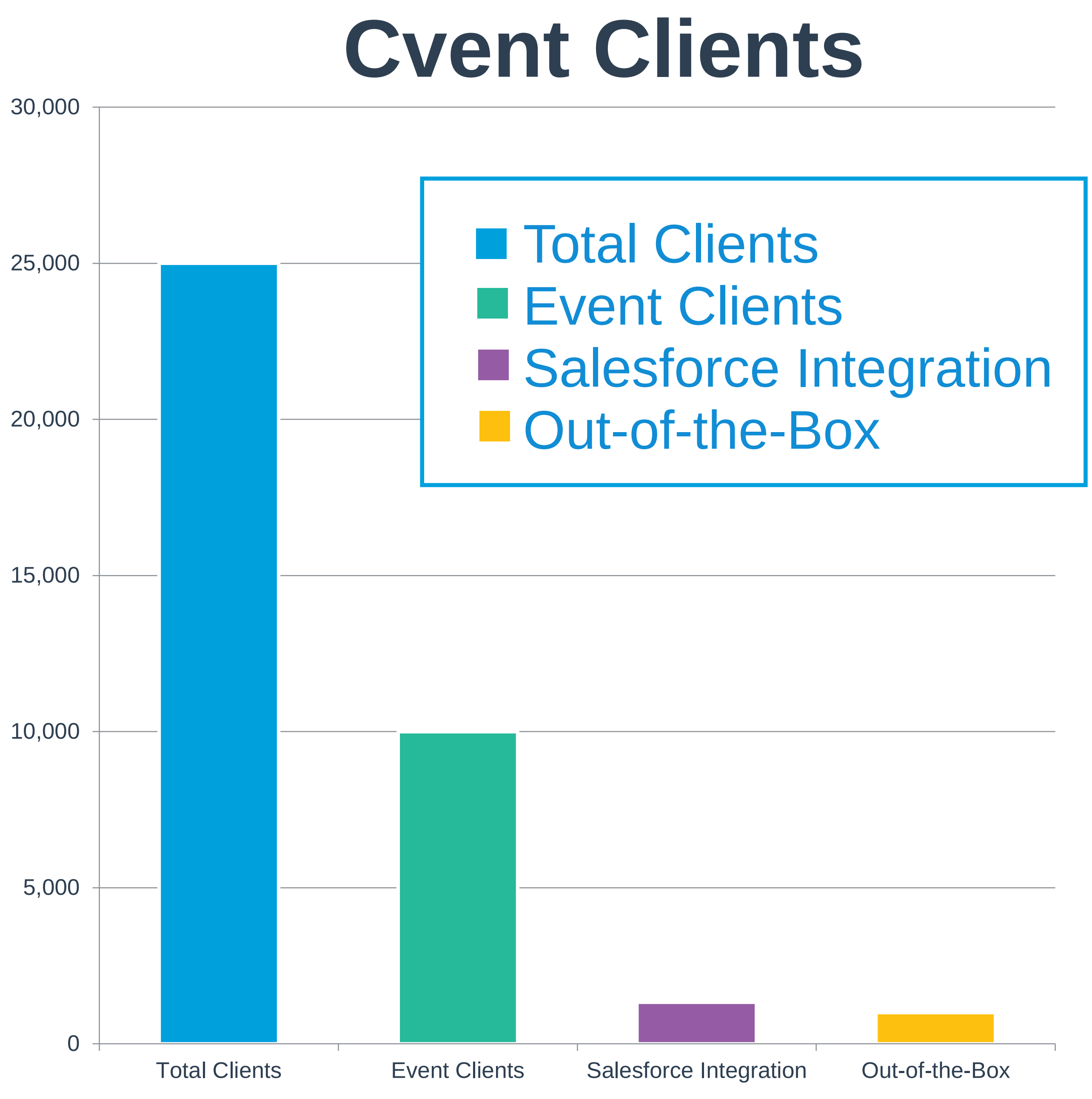
Are You Using More Than 20%?

cvent + salesforce

INTEGRATION STATS

Total clients: 25K
Event clients: 10K
Enabled: 1334
OOTB: 1000

That leaves only
334!!!



Cvent Salesforce Integration

Sync Contacts and specific fields in Cvent to Salesforce

Automatically create tasks in Salesforce based on specific actions that occur in Cvent

Cvent Salesforce Integration

Integration is done by way of API (Application Program Interface)

APIs allow programs to push and pull data

*Caveat: Salesforce limits your API Calls

Poll Question:

Are You Currently Using Salesforce Integration?

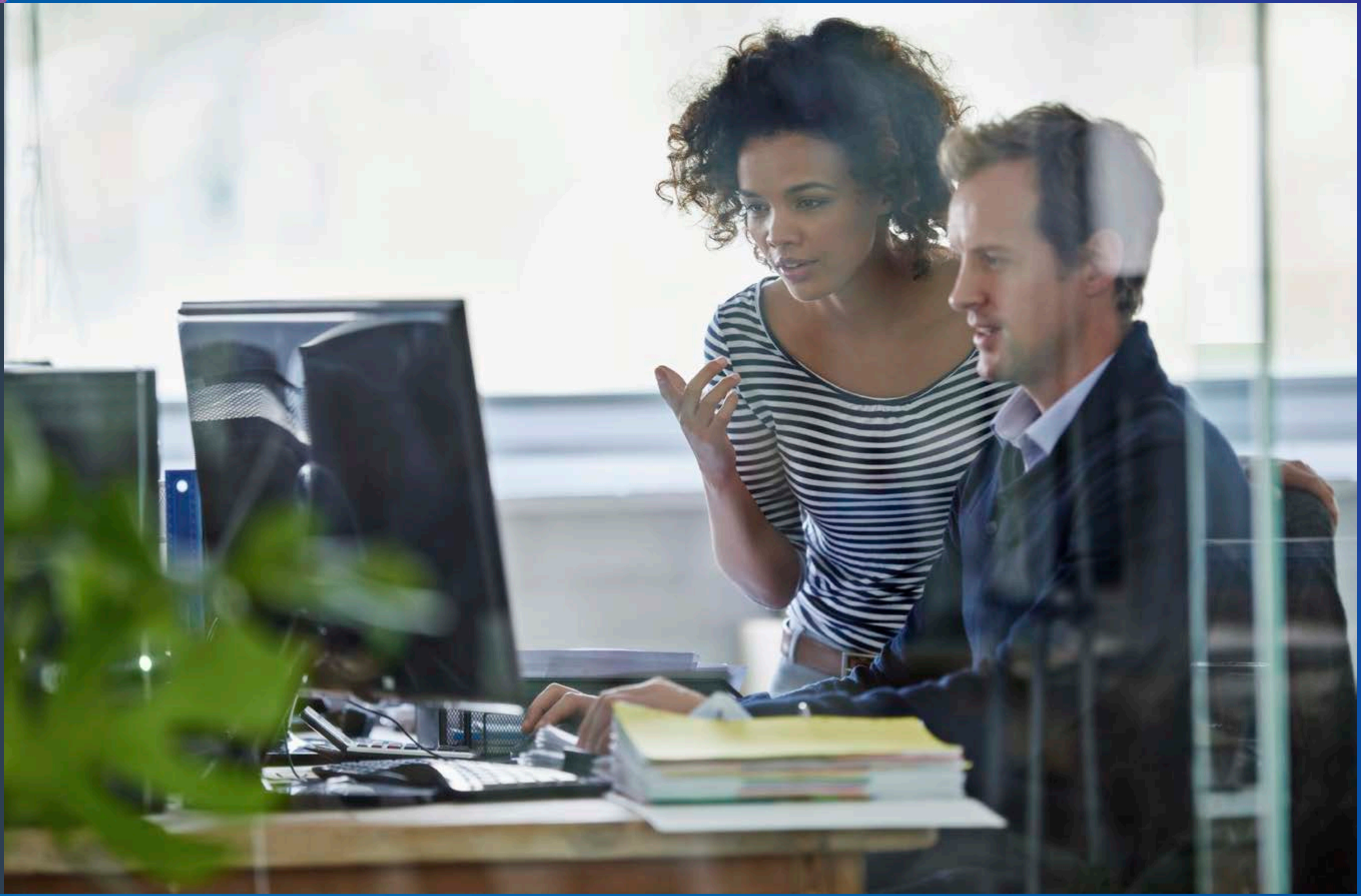
NO

- We plan to in the future
- We haven’t investigated
- I’m already lost.
  What session is this?

YES

- We sync Contacts
- We sync Contacts and Campaigns
- WE’RE ONE OF THE 334!

What Can Cvent’s Salesforce Integration Do???

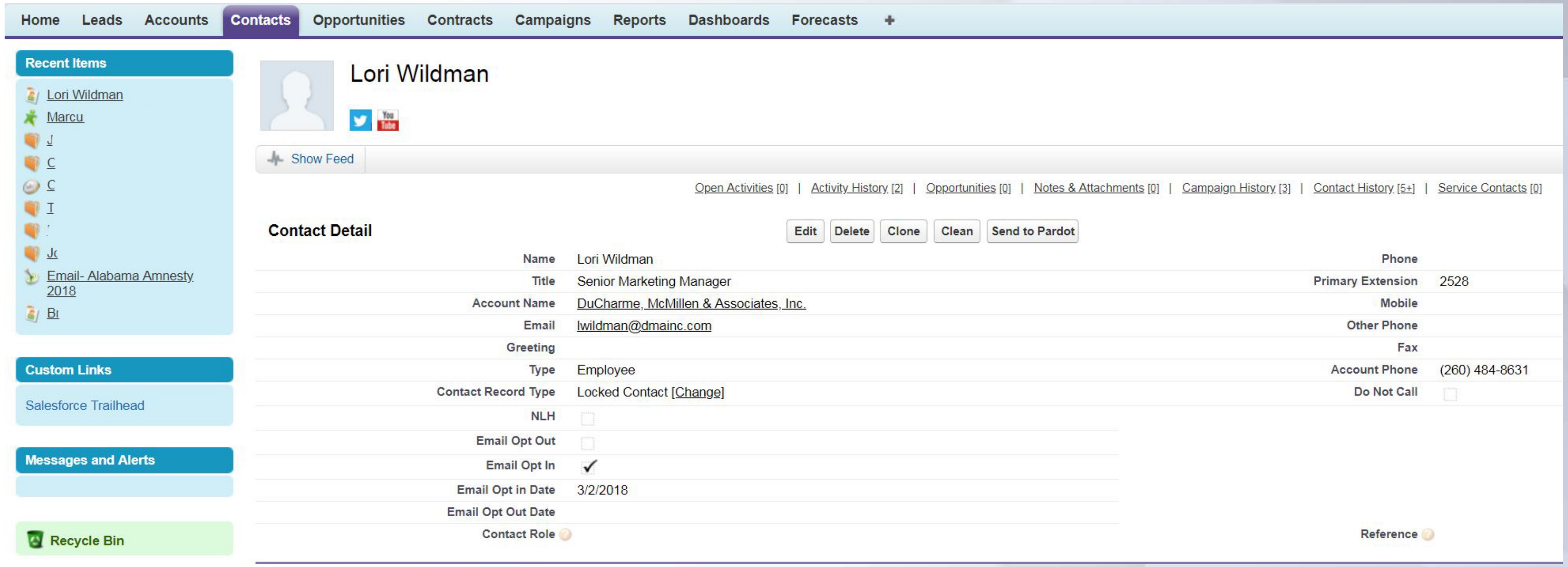


Help Your Sales/Marketing Teams!

- Update Contact and Lead information, including Opt-Outs
- Create Leads and Contacts
- Update Campaigns
- Create Activity History
- Create and Assign Tasks and Opportunities

Salesforce Definitions

- Contact
- Lead
- Campaign
- Activity
- Task
- Opportunity



Salesforce Definitions

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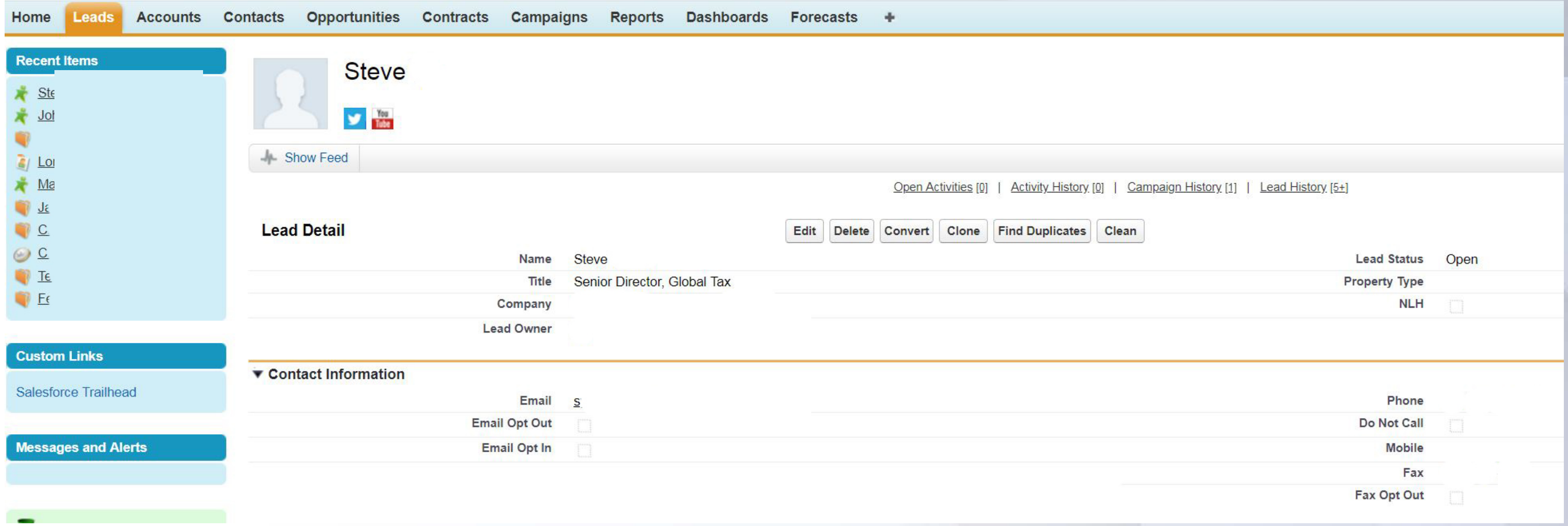

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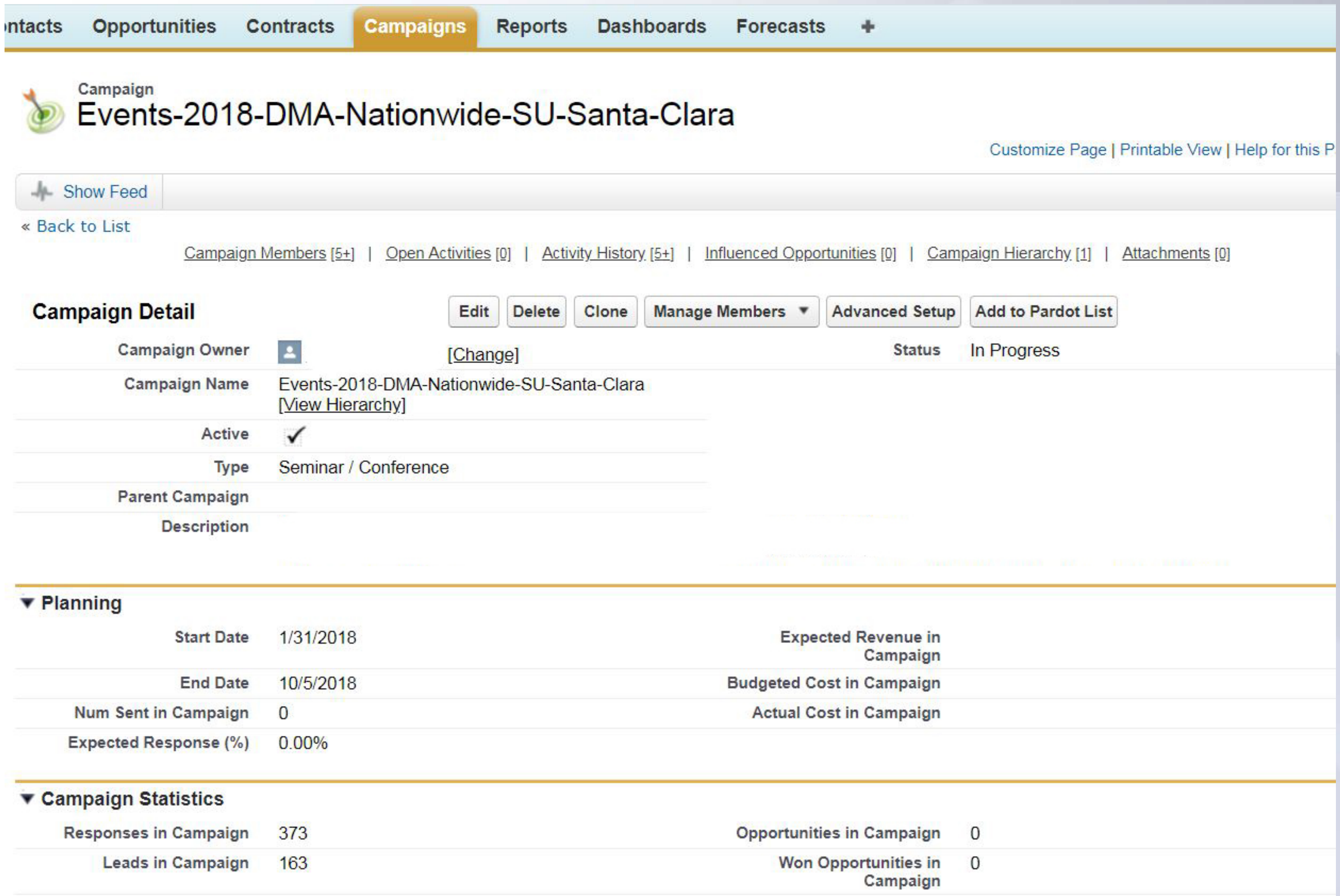


Salesforce Definitions

- Contact
- Lead
- Campaign
- Activity
- Task
- Opportunity

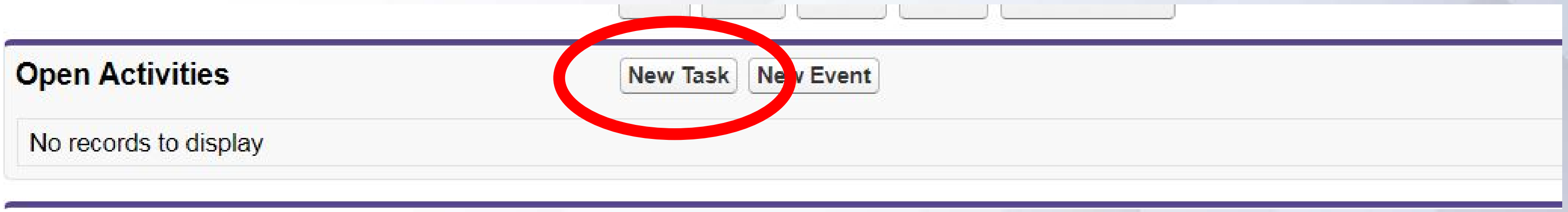
Activity History

Log a Call | Send an Email | View All

Action	Subject
Edit | Del	Attended Event: Nationwide Sales/Use Tax Update | 06 Jun 2018
Edit | Del	Cvent email sent: Nationwide Sales/Use Tax Update | 06 Jun 2018
Edit | Del	Presentation - MI SU Event

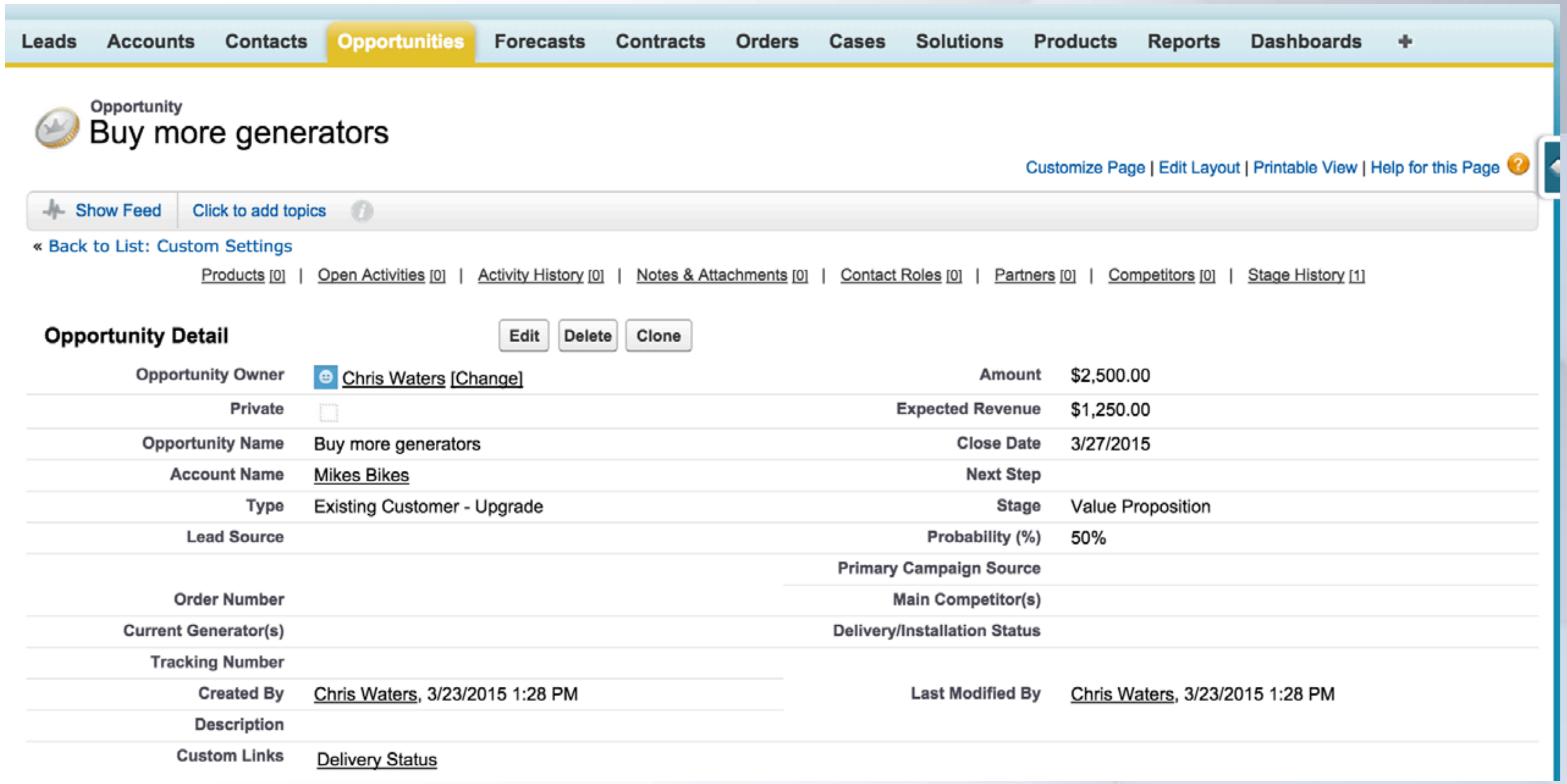
Salesforce Definitions

- Contact
- Lead
- Campaign
- Activity
- Task
- Opportunity



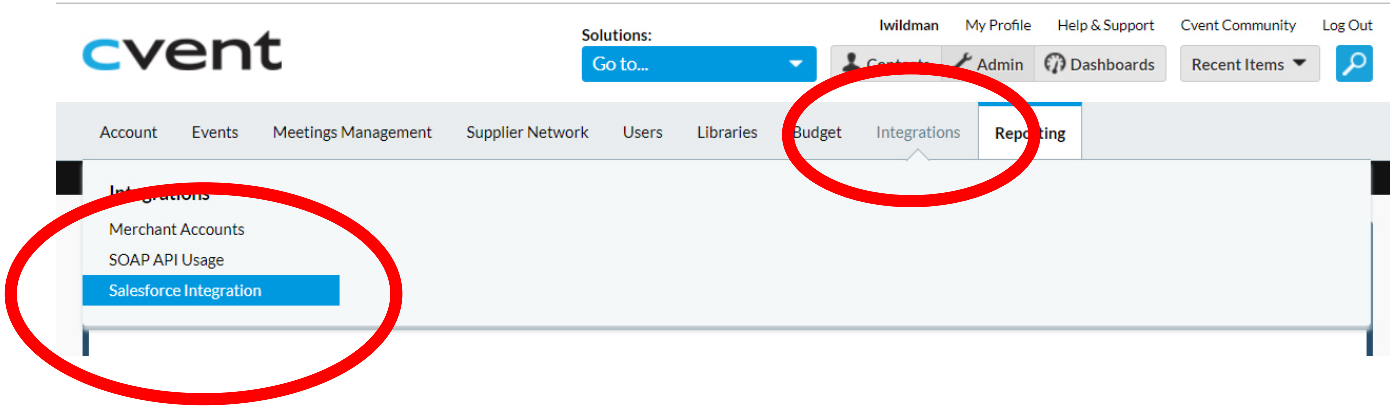
Salesforce Definitions

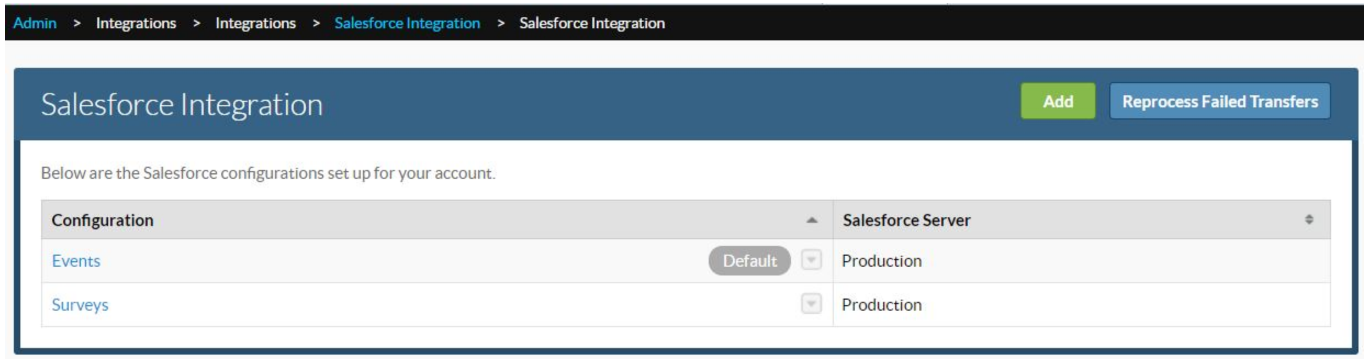
- Contact
- Lead
- Campaign
- Activity
- Task
- Opportunity



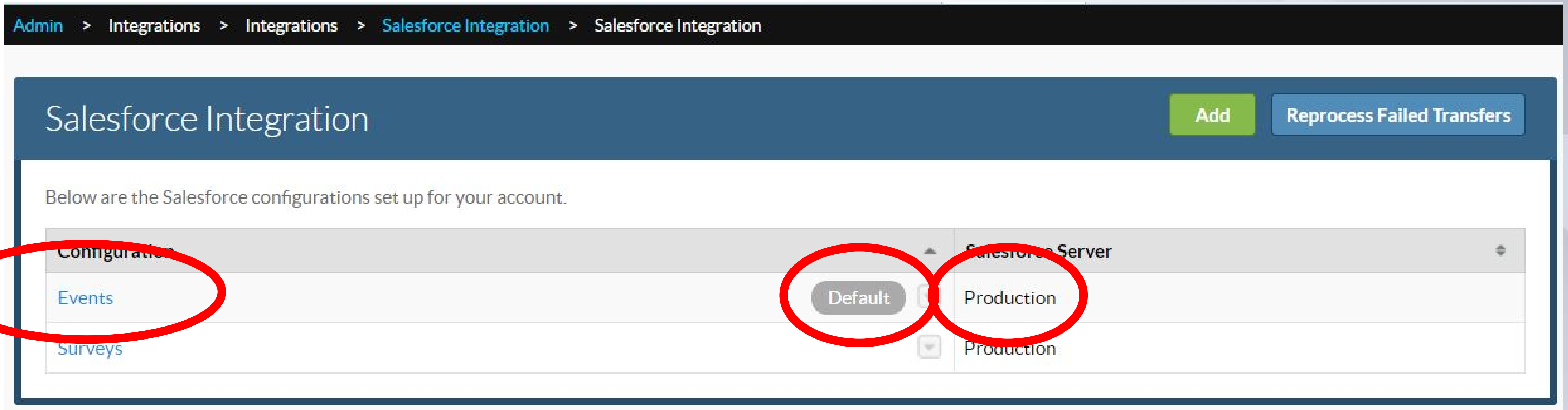
Setting Up Integration

Ask your Account Manager to help you get started!





Salesforce Integration



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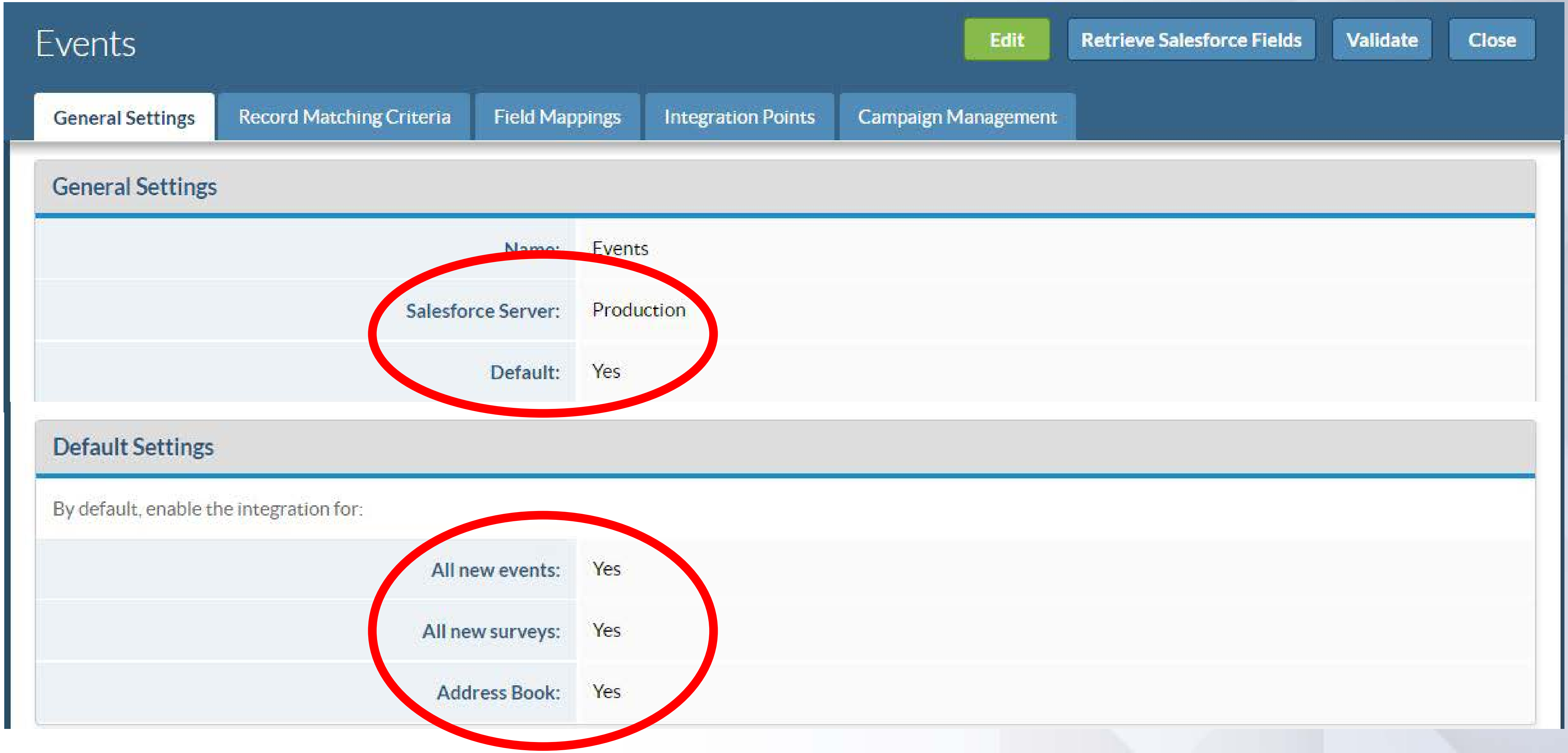


Salesforce Integration

Events

Edit | Retrieve Salesforce Fields

General Settings | Record Matching Criteria | Field Mappings | Integration Points | Campaign Management

Account

Select which Salesforce account fields to match with Cvent contact fields.

Salesforce Account	Cvent Contact
Physical Street (255 Chars)	Work Address 1 (40 Chars)
Account Phone (40 Chars)	Work Phone (30 Chars)
Account Name (255 Chars)	Company (100 Chars)

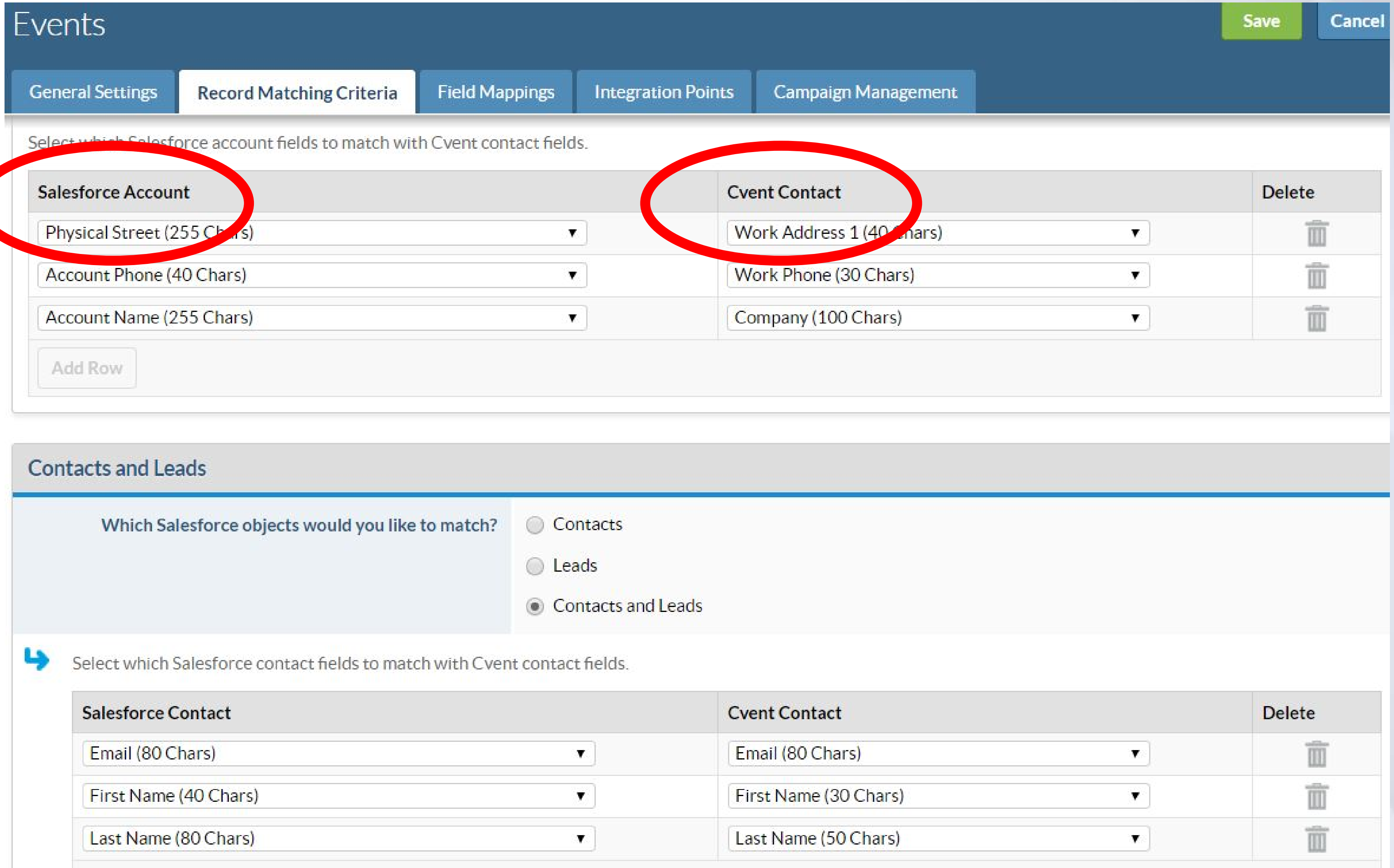
Contacts and Leads

Which Salesforce objects would you like to match? Contacts and Leads

Select which Salesforce contact fields to match with Cvent contact fields.

Salesforce Contact	Cvent Contact
Email (80 Chars)	Email (80 Chars)
First Name (40 Chars)	First Name (30 Chars)
Last Name (80 Chars)	Last Name (50 Chars)

Salesforce Integration



Salesforce Integration

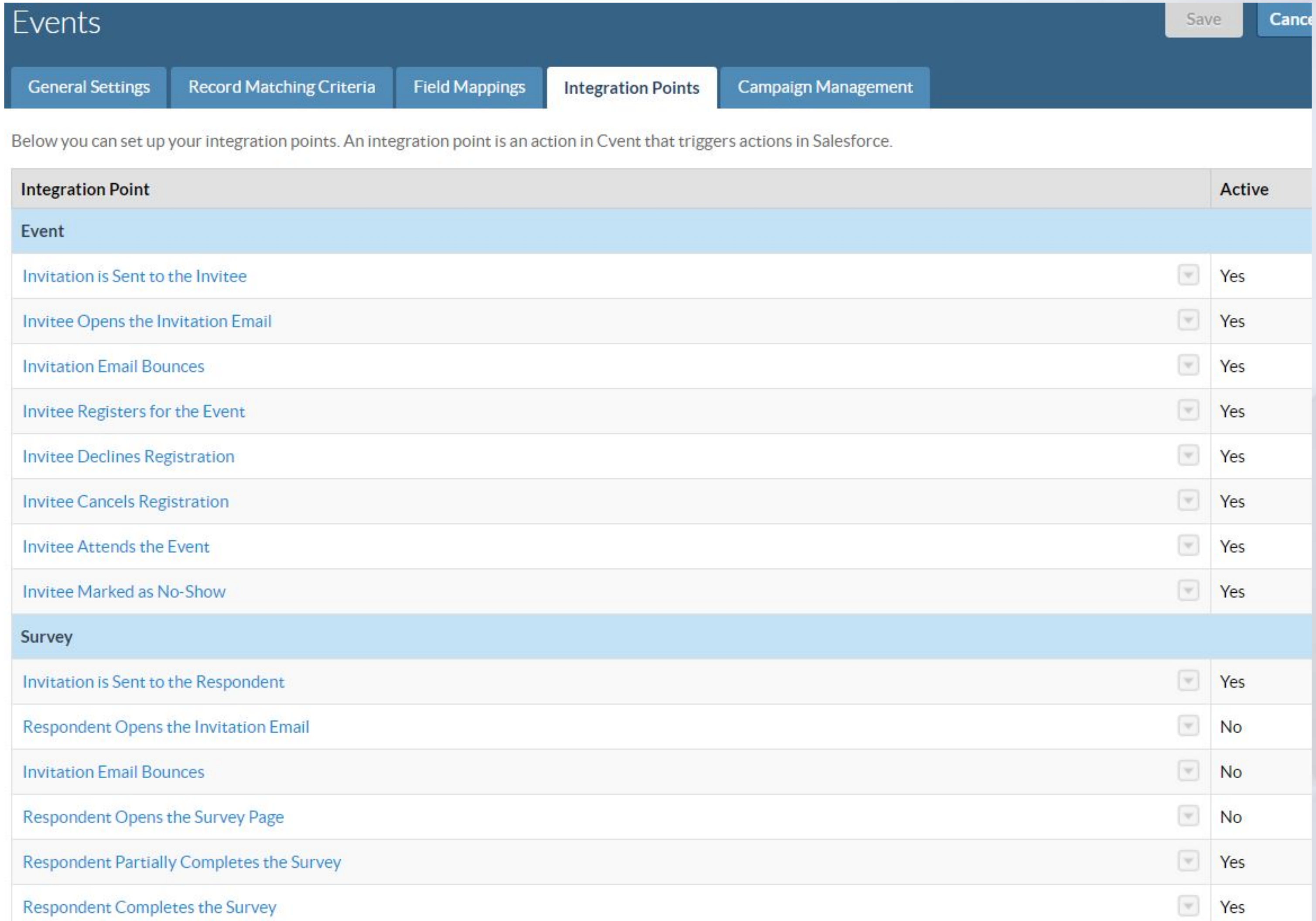
Events

Save | Cancel | Spelling

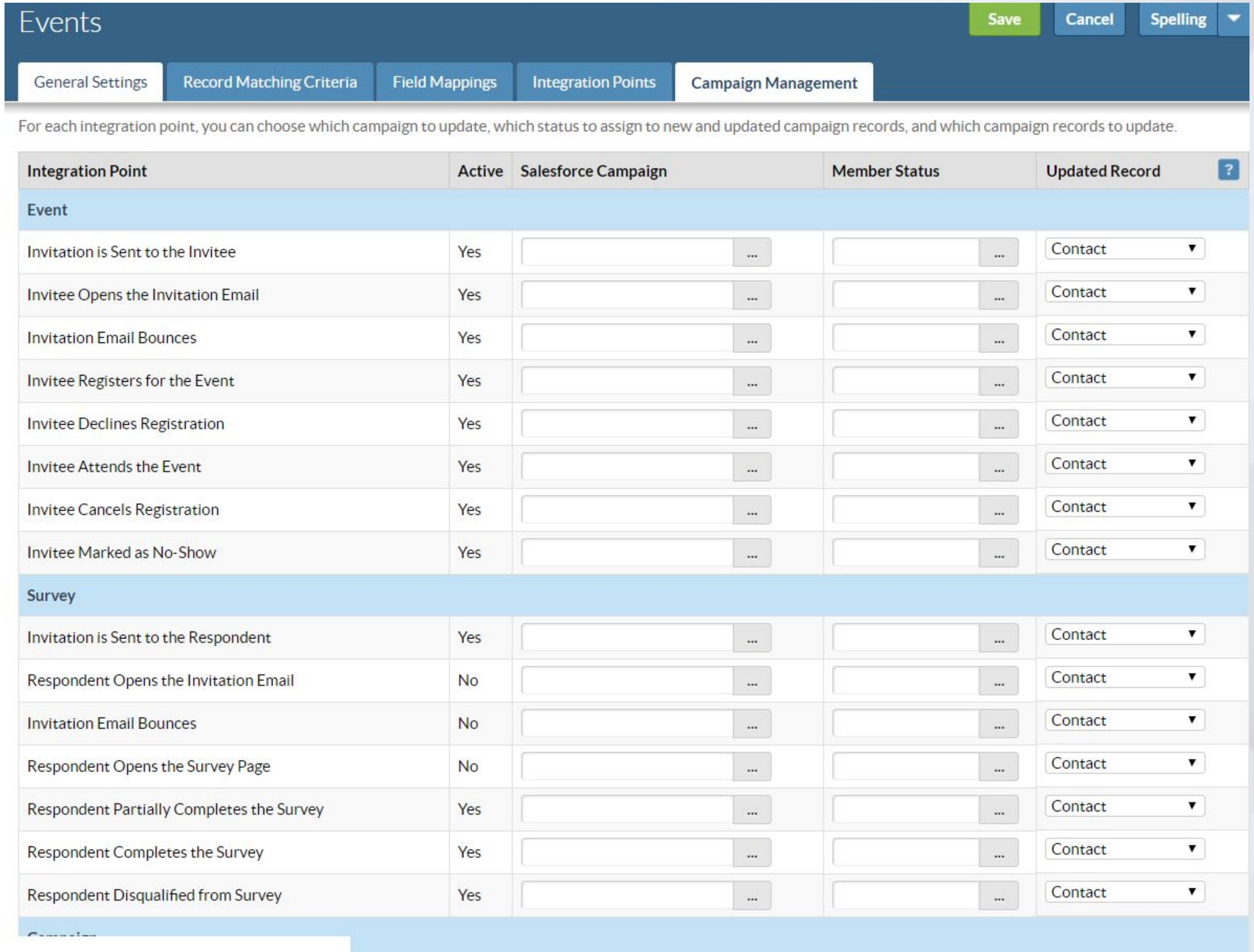
General Settings | Record Matching Criteria | Field Mappings | Integration Points | Campaign Management

Salesforce Fields	Salesforce Objects	Required in Salesforce	Has Default in Salesforce	Default Export Value	Cvent Contact Fields
* Account Name (255 Chars)	Account	Yes	No		Company ...
* Company (255 Chars)	Lead	Yes	No		Company ...
* Last Name (80 Chars)	Contact and Lead	Yes	No		Last Name ...
Account Phone (1300 Chars)	Contact	No	No		...
Allow Customer Portal Self-Registration (Check Box)	Contact	No	Yes		...
Annual Revenue (18 Digits)	Lead	No	No		...
Assistant Email (80 Chars)	Contact	No	No		...
Assistant's Name (40 Chars)	Contact	No	No		...
Asst. Phone (40 Chars)	Contact	No	No		...
Birthdate (Date)	Contact	No	No		...
Business Fax (40 Chars)	Contact	No	No		...
Business Phone (40 Chars)	Contact	No	No		Work Phone ...
City (40 Chars)	Lead	No	No		Work City ...

Salesforce Integration



Salesforce Integration



Events

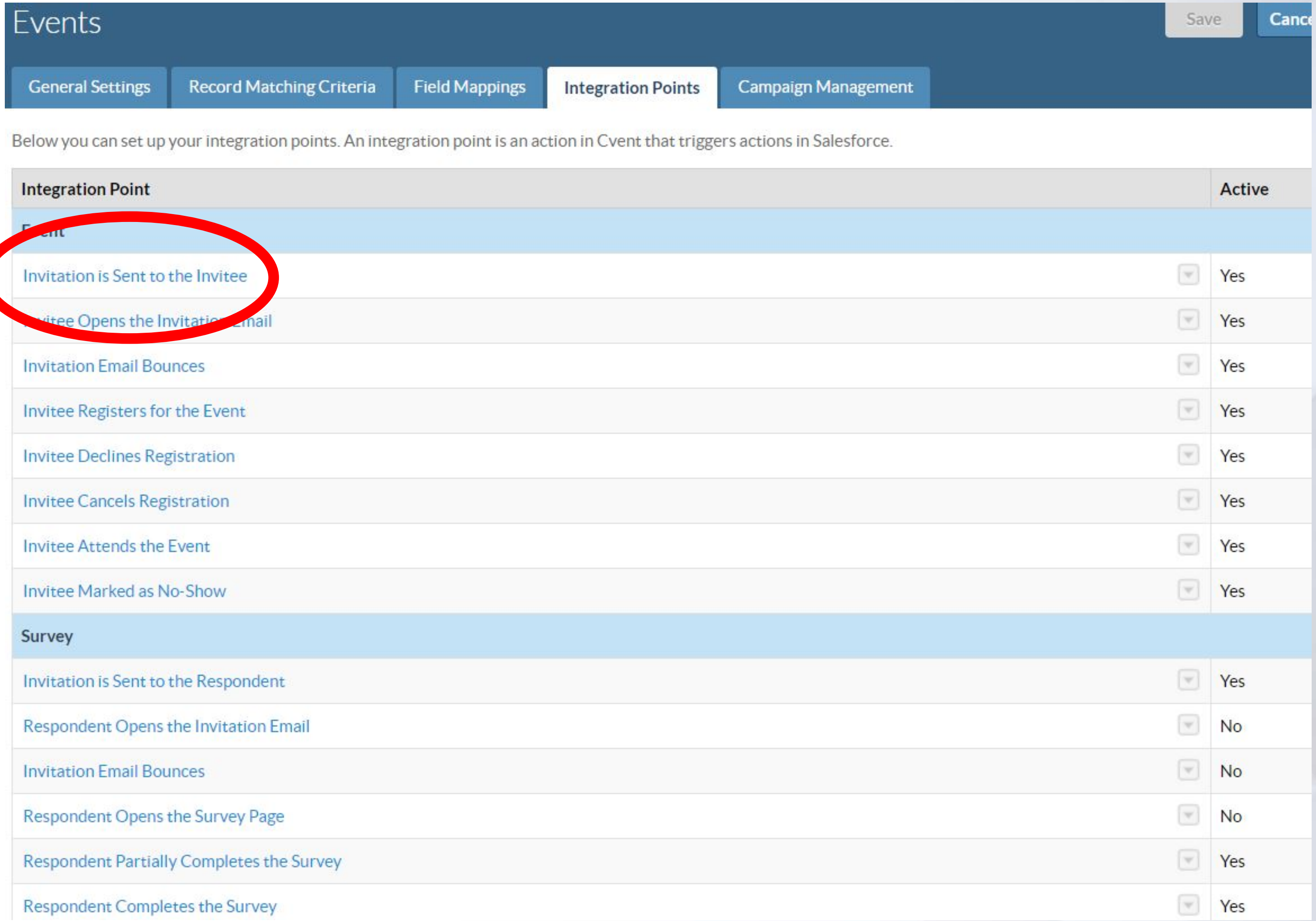
Save | Cancel | Spelling

General Settings | Record Matching Criteria | Field Mappings | Integration Points | Campaign Management

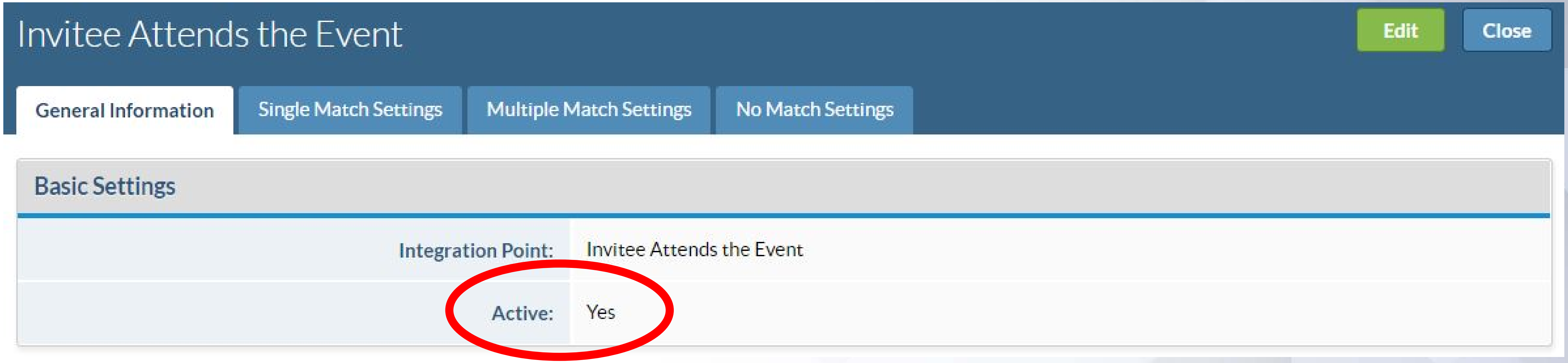
For each integration point, you can choose which campaign to update, which status to assign to new and updated campaign records, and which campaign records to update.

Integration Point	Active	Salesforce Campaign	Member Status	Updated Record
Event				
Invitation is Sent to the Invitee	Yes	...	...	Contact
Invitee Opens the Invitation Email	Yes	...	...	Contact
Invitation Email Bounces	Yes	...	...	Contact
Invitee Registers for the Event	Yes	...	...	Contact
Invitee Declines Registration	Yes	...	...	Contact
Invitee Attends the Event	Yes	...	...	Contact
Invitee Cancels Registration	Yes	...	...	Contact
Invitee Marked as No-Show	Yes	...	...	Contact
Survey				
Invitation is Sent to the Respondent	Yes	...	...	Contact
Respondent Opens the Invitation Email	No	...	...	Contact
Invitation Email Bounces	No	...	...	Contact
Respondent Opens the Survey Page	No	...	...	Contact
Respondent Partially Completes the Survey	Yes	...	...	Contact
Respondent Completes the Survey	Yes	...	...	Contact
Respondent Disqualified from Survey	Yes	...	...	Contact

Salesforce Integration



Salesforce Integration



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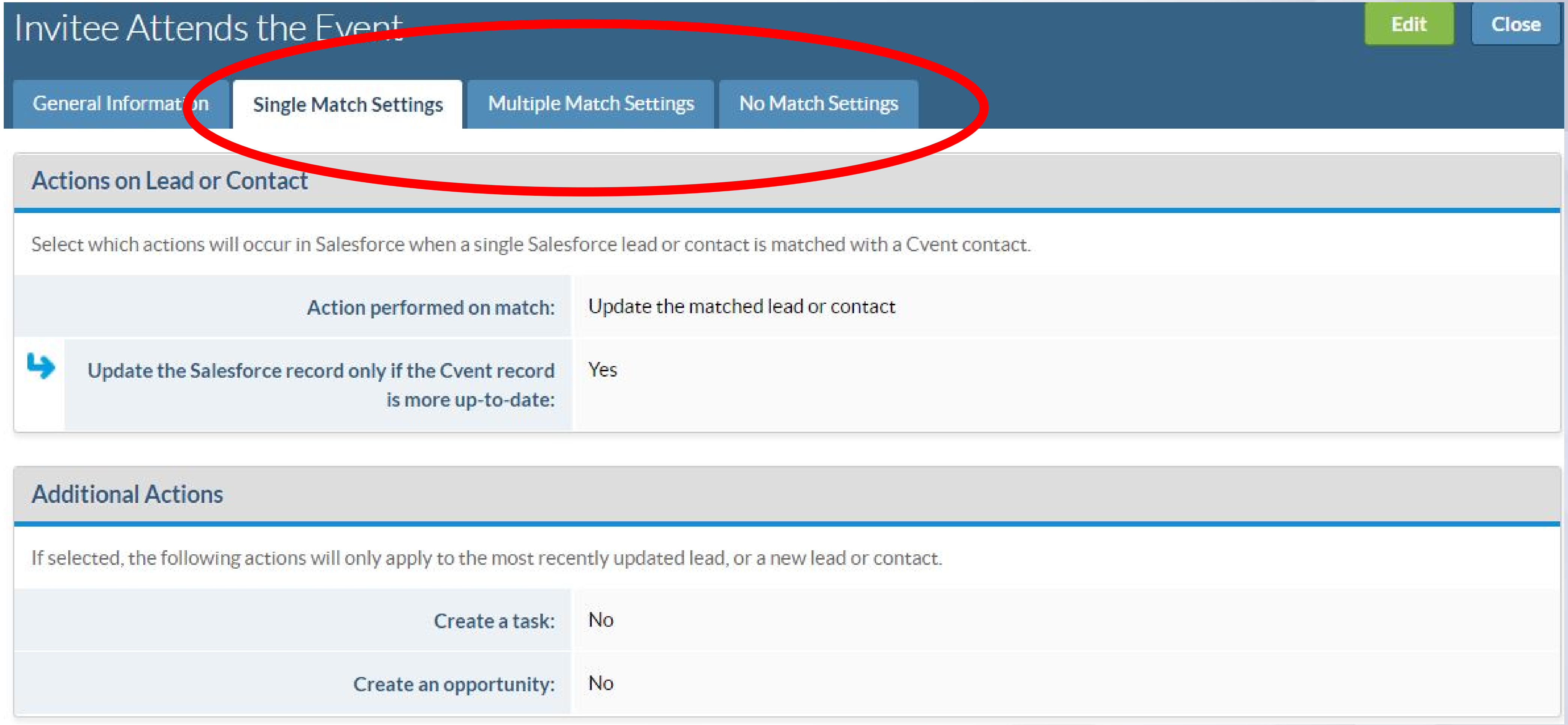

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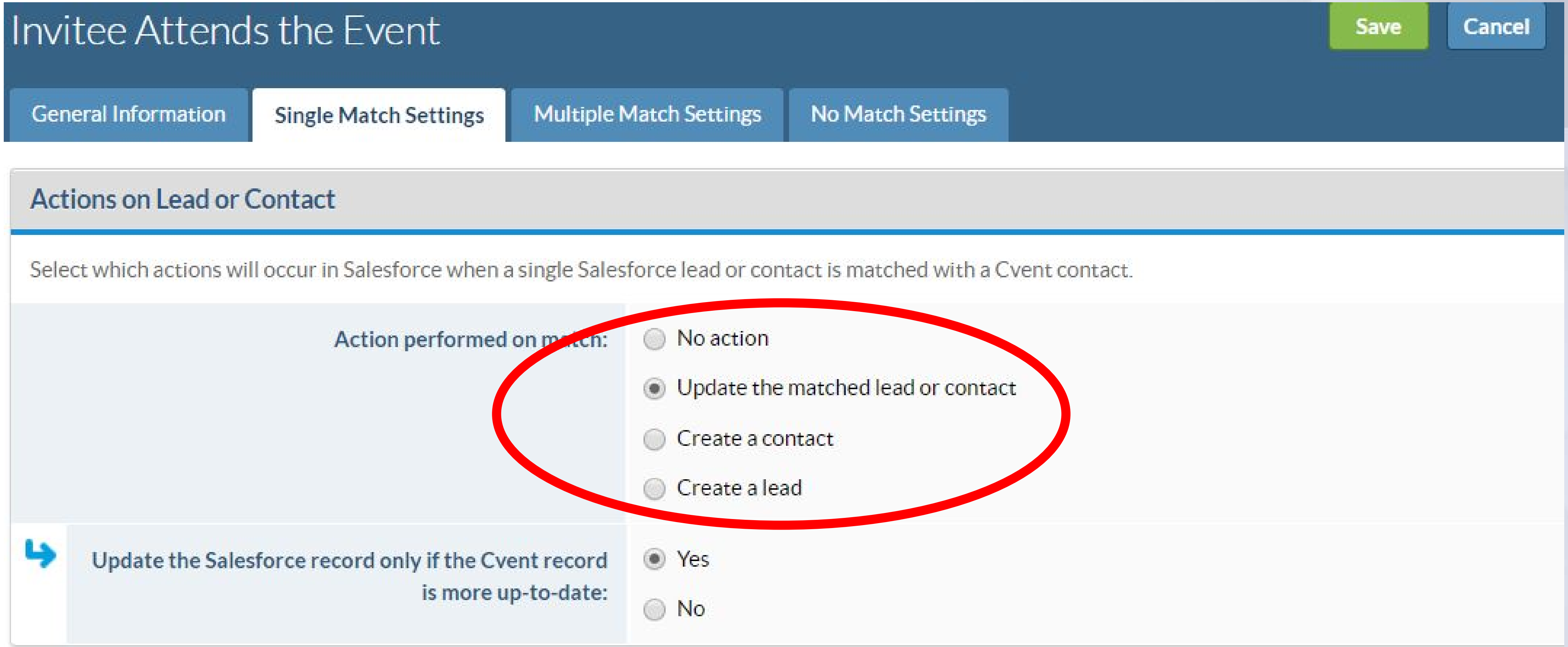

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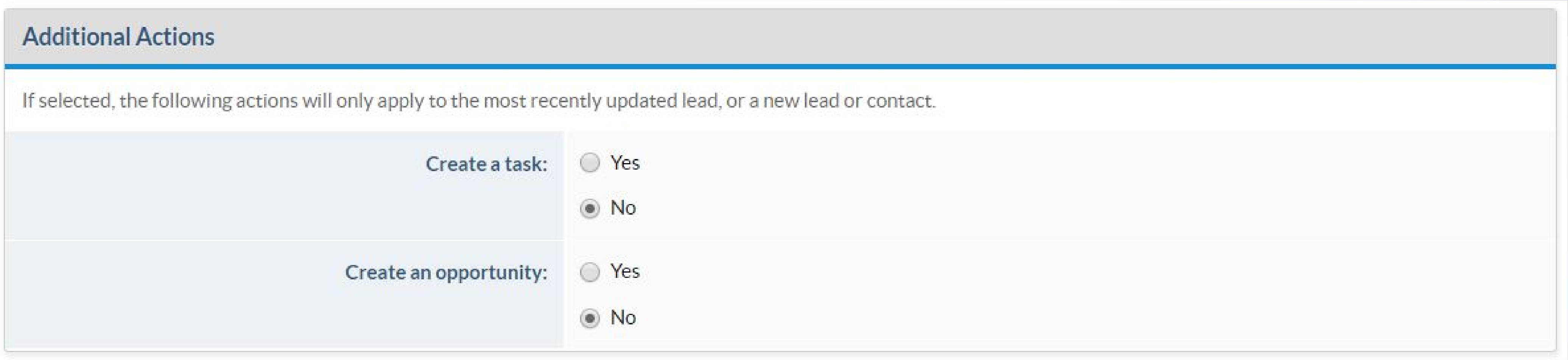
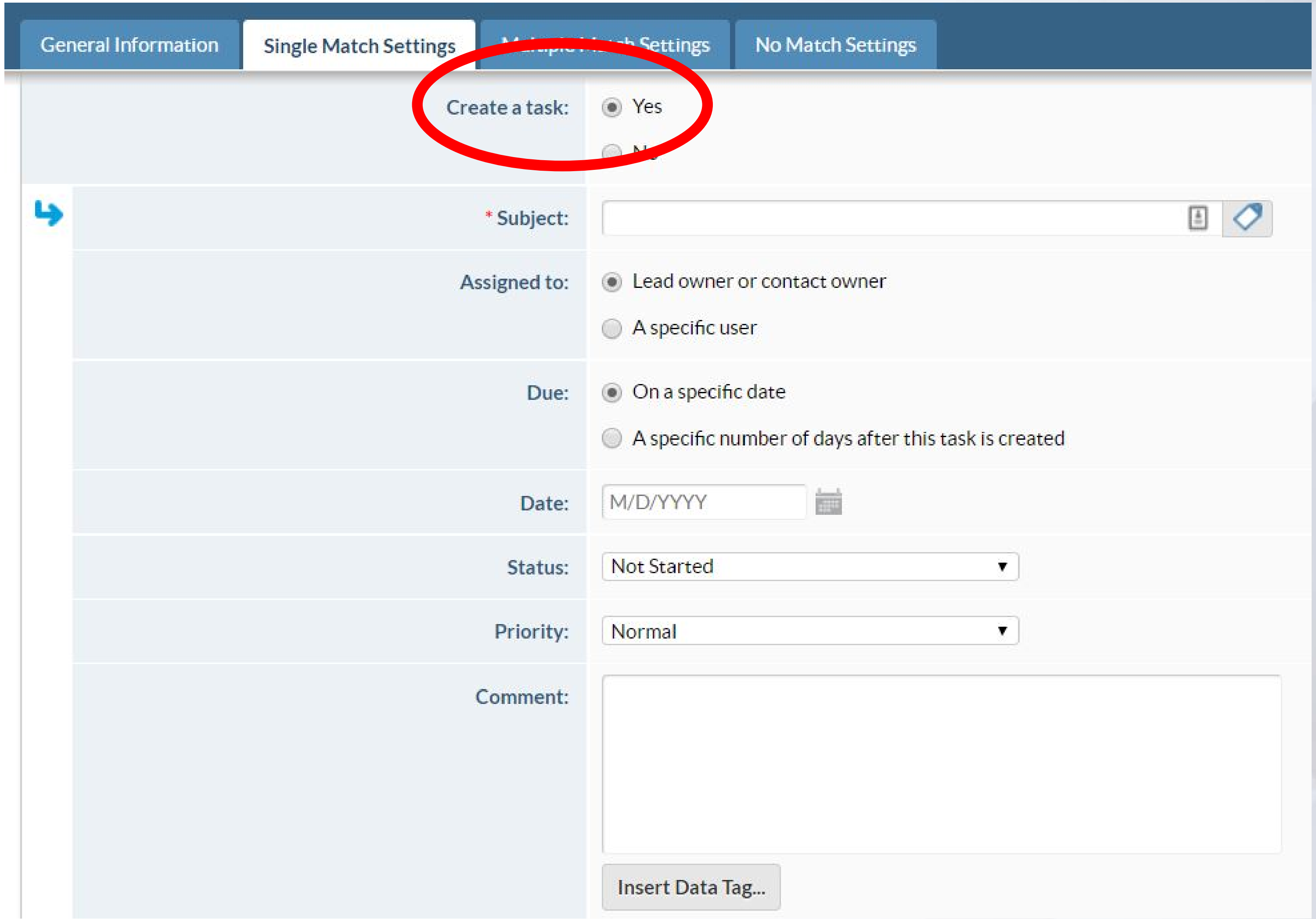
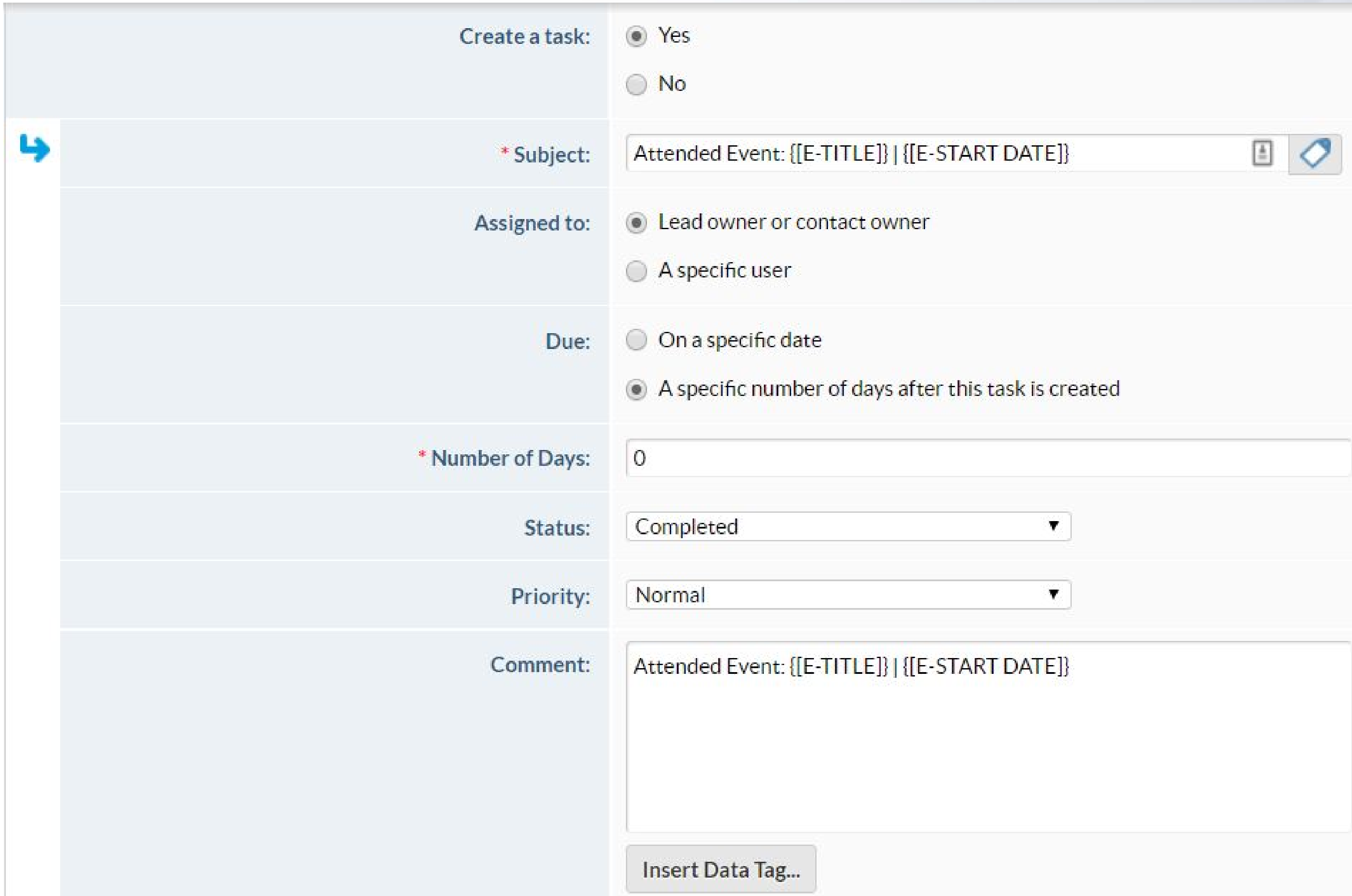


Salesforce Integration



Salesforce Integration



Create a task: Yes / No

* Subject: Attended Event: {[E-TITLE]} | {[E-START DATE]}

Assigned to: Lead owner or contact owner / A specific user

Due: On a specific date / A specific number of days after this task is created

* Number of Days: 0

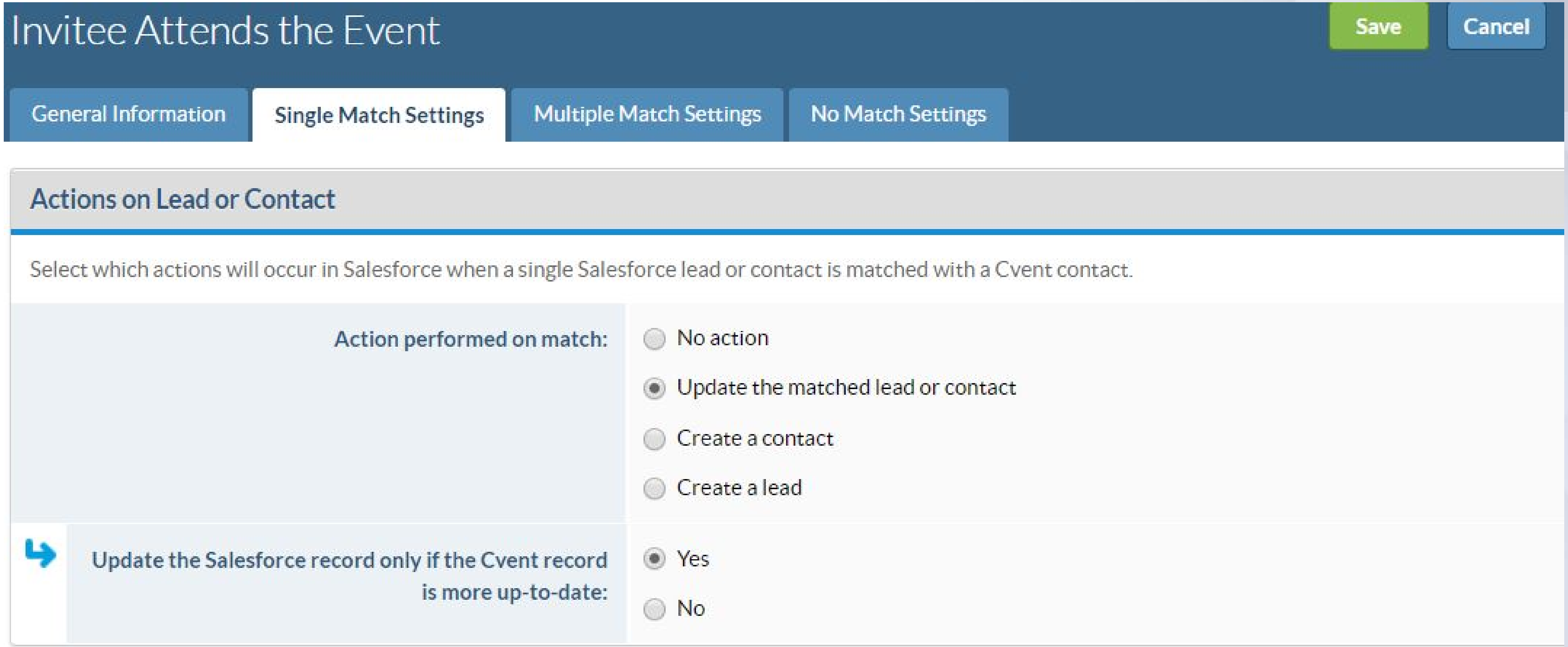
Status: Completed

Priority: Normal

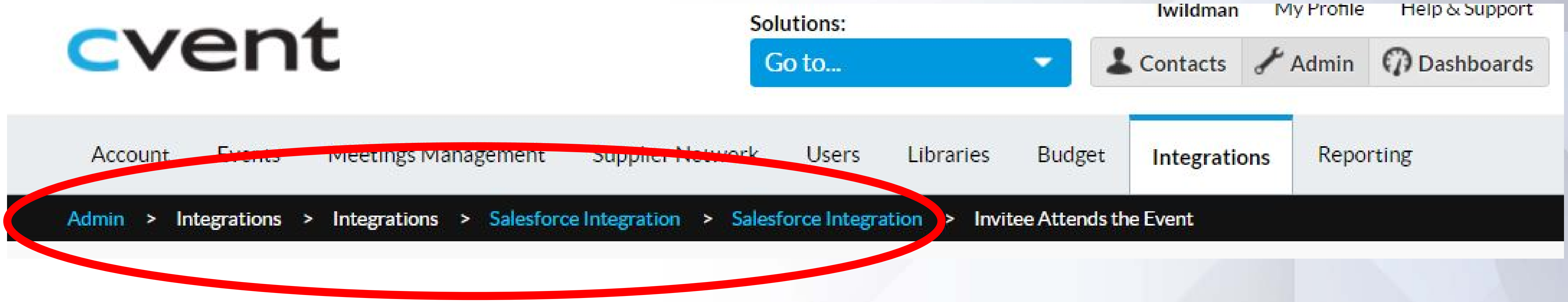
Comment: Attended Event: {[E-TITLE]} | {[E-START DATE]}

Insert Data Tag...

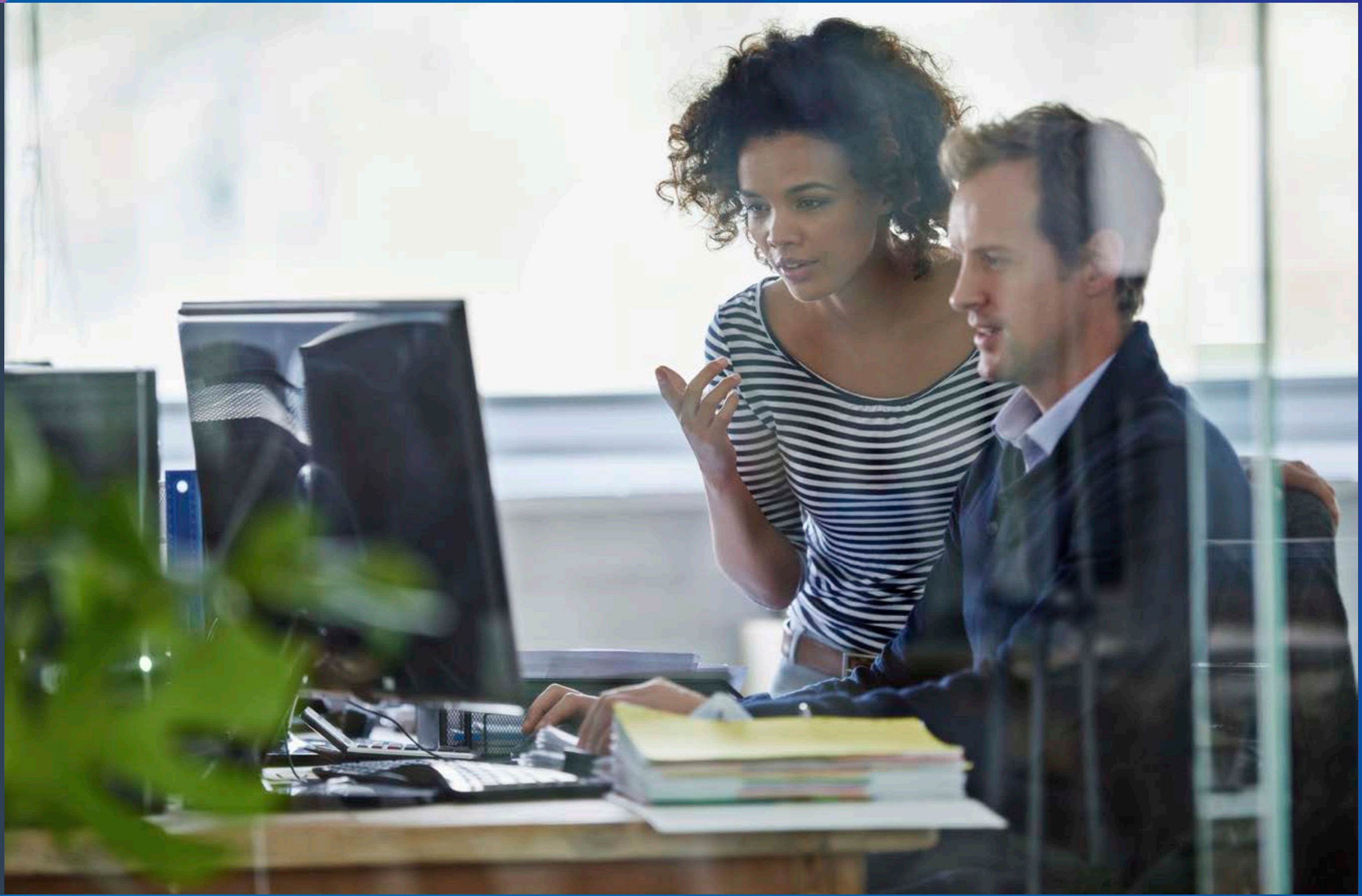
Salesforce Integration



Salesforce Integration



What Does This Look Like in Salesforce?



Activity History

Activity History

Log a Call | Send an Email | View All

Action	Subject	Task	Due Date
Edit | Del	Attended Event: Nationwide Sales/Use Tax Update | 06 Jun 2018	✓	6/6/2018
Edit | Del	Cvent email sent: Nationwide Sales/Use Tax Update | 06 Jun 2018	✓	5/1/2018
Edit | Del	Presentation - MI SU Event	✓	9/20/2017

Campaign History

Campaign History Add to Campaign Campaign History Help ?

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Edit | Del | View	Email- Texas Amnesty 2018	4/25/2018	Email	Opened 1 Email	✓	6/12/2018 8:20 AM
Edit | Del | View	Events-2018-DMA-Nationwide-SU-Santa-Clara	1/31/2018	Seminar / Conference	Attended	✓	4/2/2018 11:20 AM

Connecting a Campaign

Events

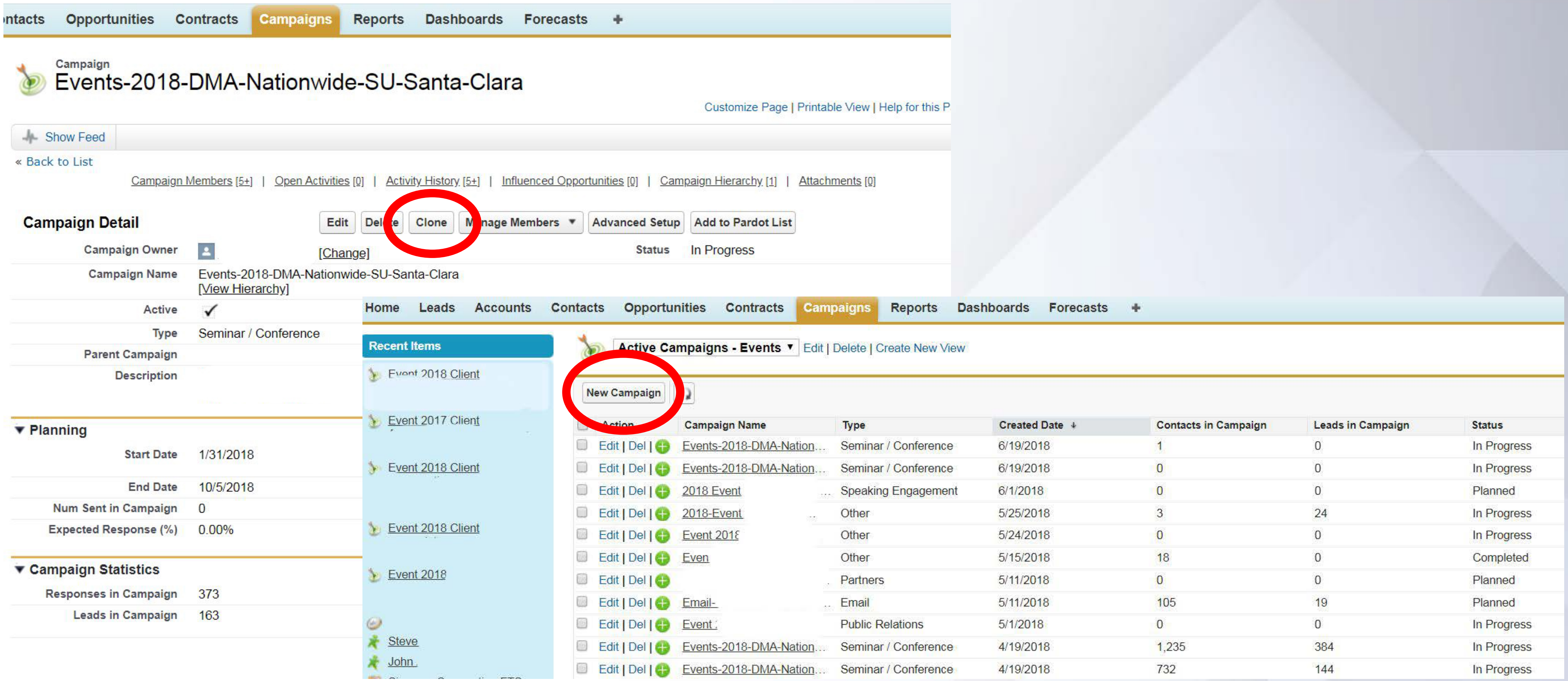
Save Cancel Spelling

General Settings | Record Matching Criteria | Field Mappings | Integration Points | Campaign Management

For each integration point, you can choose which campaign to update, which status to assign to new and updated campaign records, and which campaign records to update.

Integration Point	Active	Salesforce Campaign	Member Status	Updated Record
Event				
Invitation is Sent to the Invitee	Yes	...	...	Contact
Invitee Opens the Invitation Email	Yes	...	...	Contact
Invitation Email Bounces	Yes	...	...	Contact
Invitee Registers for the Event	Yes	...	...	Contact
Invitee Declines Registration	Yes	...	...	Contact
Invitee Attends the Event	Yes	...	...	Contact
Invitee Cancels Registration	Yes	...	...	Contact
Invitee Marked as No-Show	Yes	...	...	Contact
Survey				
Invitation is Sent to the Respondent	Yes	...	...	Contact
Respondent Opens the Invitation Email	No	...	...	Contact
Invitation Email Bounces	No	...	...	Contact
Respondent Opens the Survey Page	No	...	...	Contact
Respondent Partially Completes the Survey	Yes	...	...	Contact
Respondent Completes the Survey	Yes	...	...	Contact
Respondent Disqualified from Survey	Yes	...	...	Contact

Connecting a Campaign



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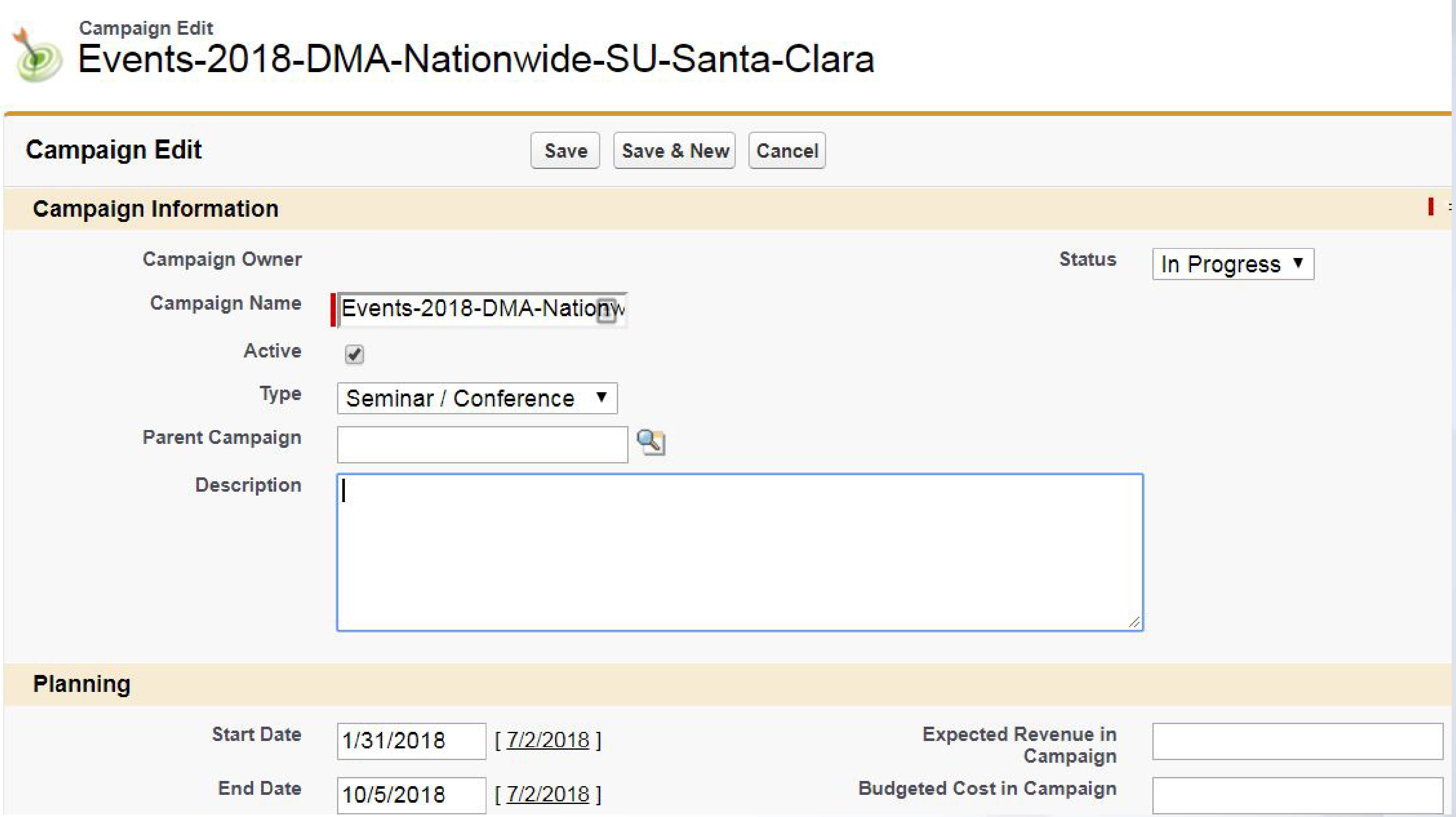

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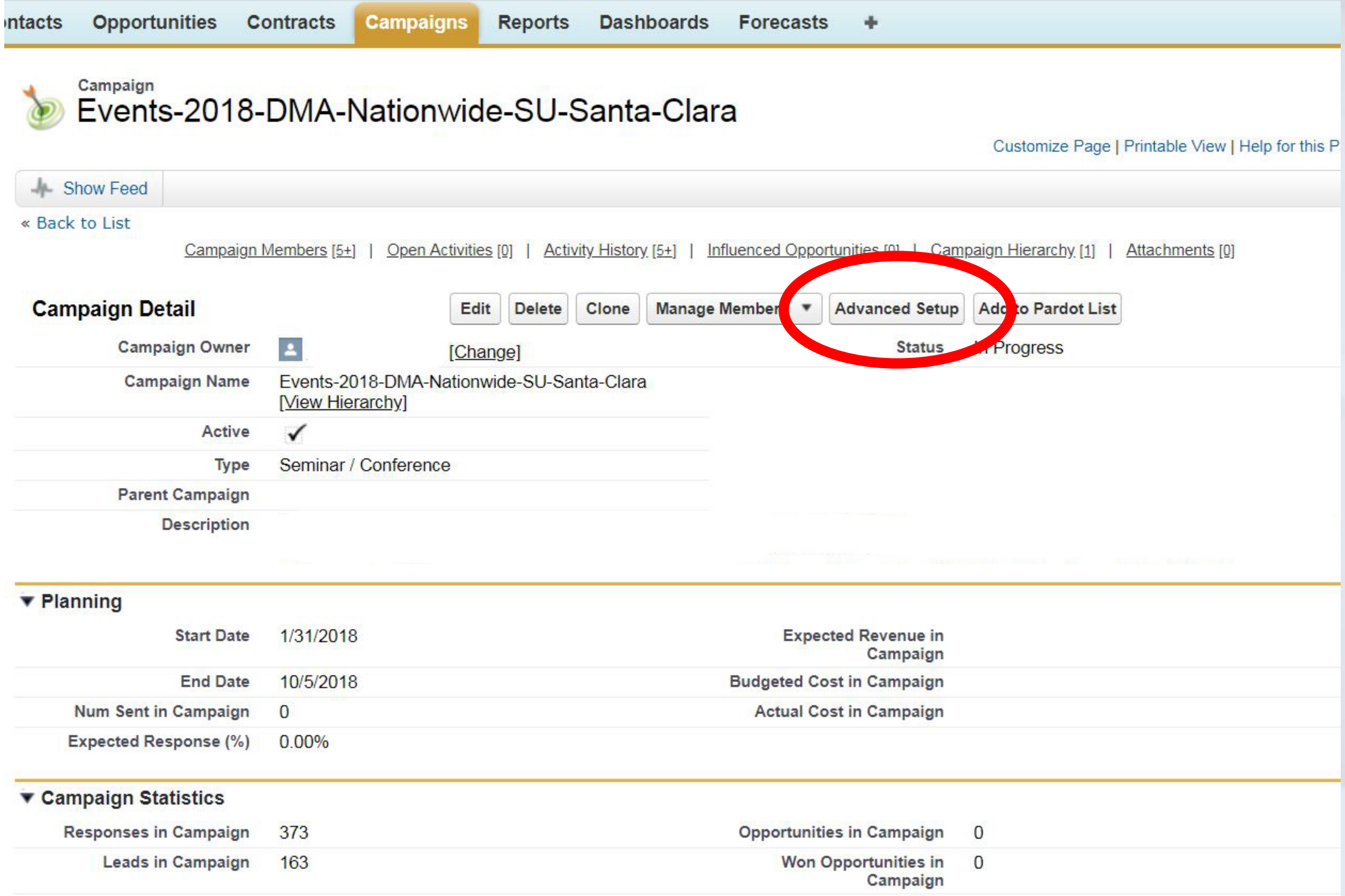
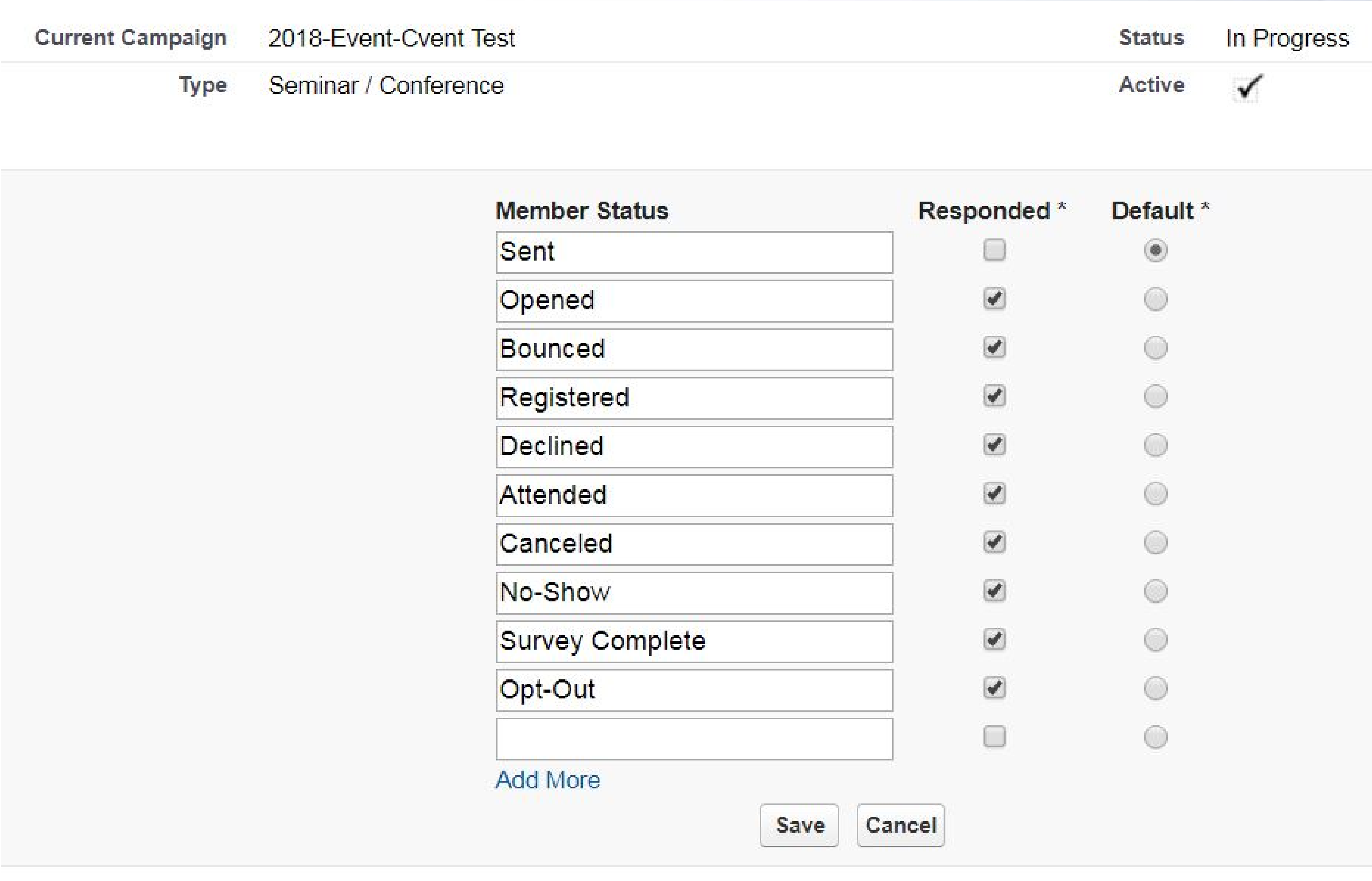


Connecting a Campaign



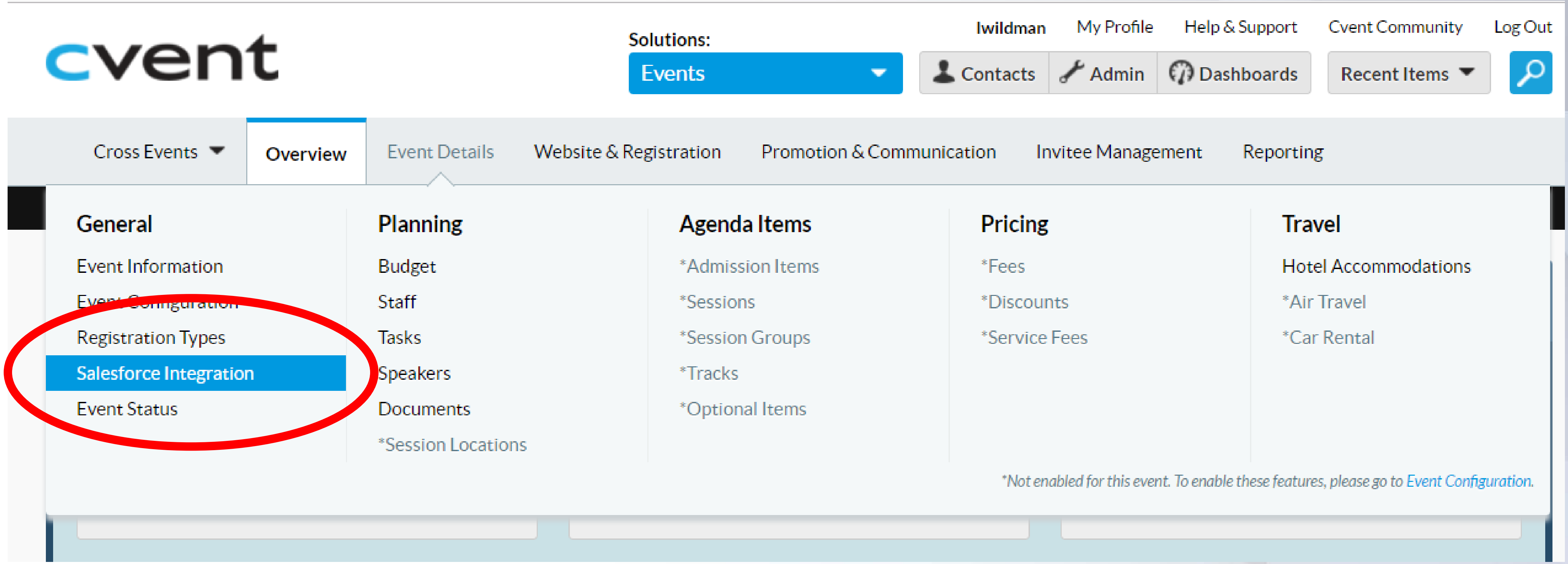
Current Campaign	2018-Event-Cvent Test	Status	In Progress
Type	Seminar / Conference	Active	✓

Member Status	Responded *	Default *
Sent	☐	◉
Opened	☑	○
Bounced	☑	○
Registered	☑	○
Declined	☑	○
Attended	☑	○
Canceled	☑	○
No-Show	☑	○
Survey Complete	☑	○
Opt-Out	☑	○
	☐	○

Add More

Save Cancel

Connecting a Campaign



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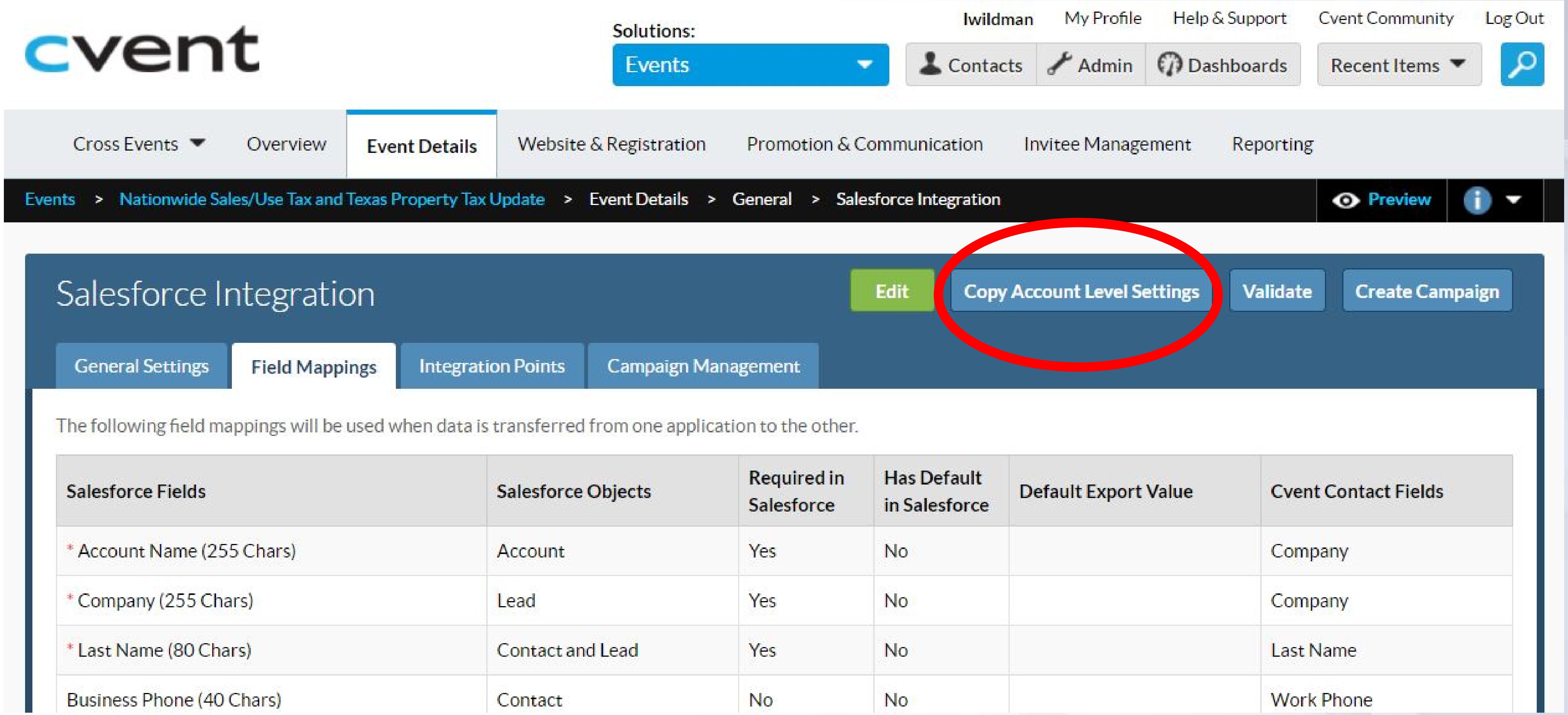

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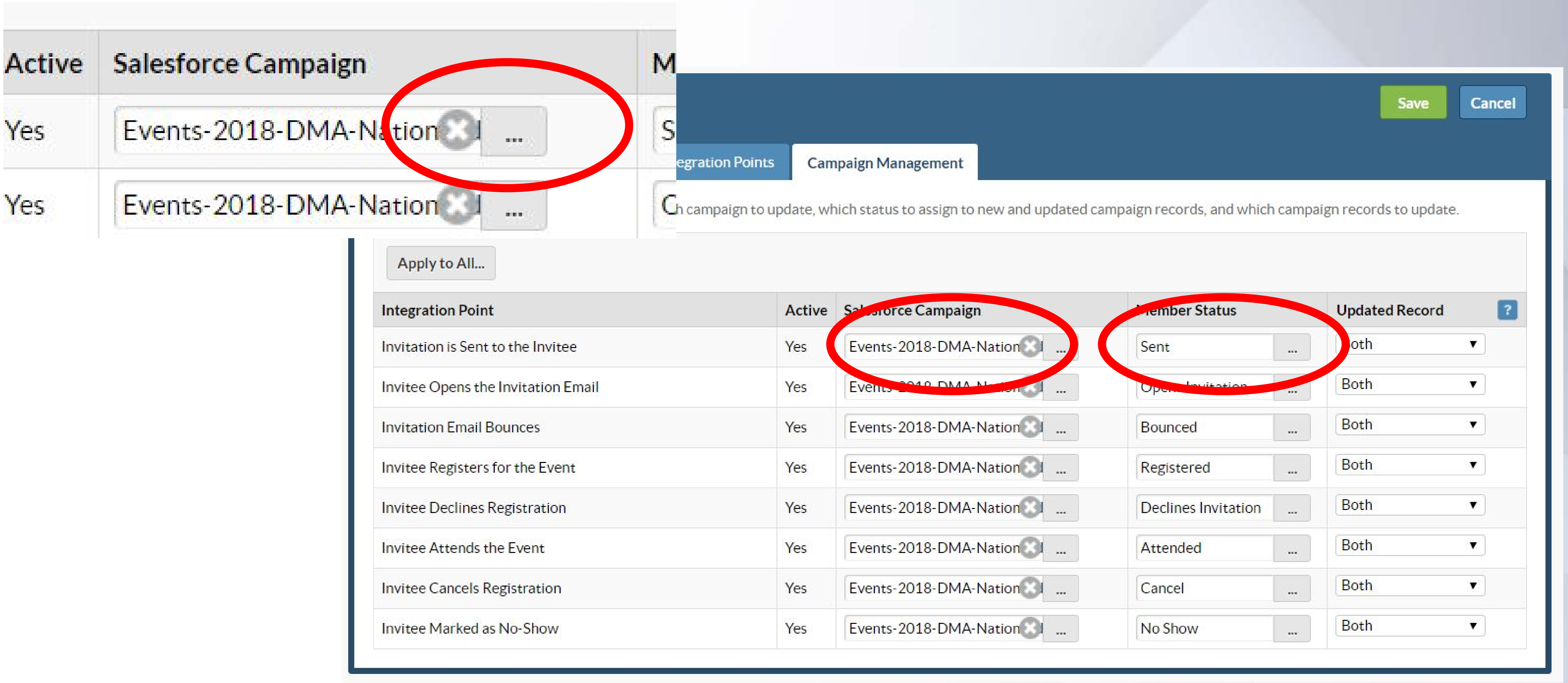

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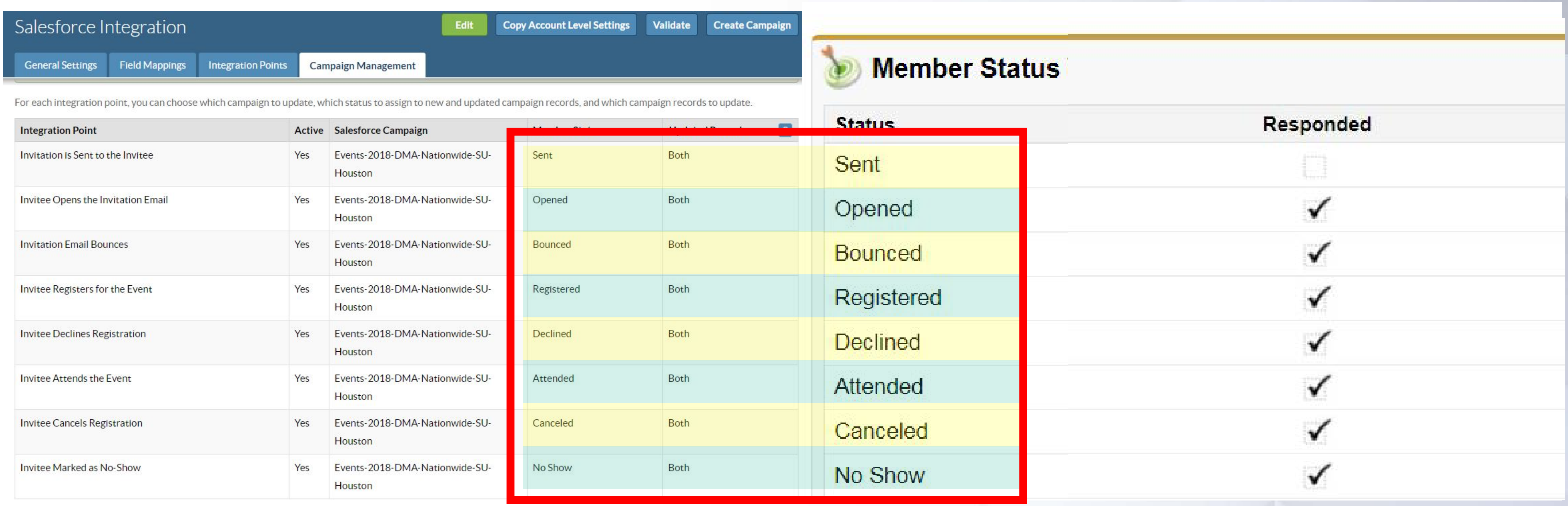


Salesforce Integration

Edit | Copy Account Level Settings | Validate | Create Campaign

General Settings | Field Mappings | Integration Points | Campaign Management

For each integration point, you can choose which campaign to update, which status to assign to new and updated campaign records, and which campaign records to update.

Integration Point	Active	Salesforce Campaign		
Invitation is Sent to the Invitee	Yes	Events-2018-DMA-Nationwide-SU-Houston	Sent	Both
Invitee Opens the Invitation Email	Yes	Events-2018-DMA-Nationwide-SU-Houston	Opened	Both
Invitation Email Bounces	Yes	Events-2018-DMA-Nationwide-SU-Houston	Bounced	Both
Invitee Registers for the Event	Yes	Events-2018-DMA-Nationwide-SU-Houston	Registered	Both
Invitee Declines Registration	Yes	Events-2018-DMA-Nationwide-SU-Houston	Declined	Both
Invitee Attends the Event	Yes	Events-2018-DMA-Nationwide-SU-Houston	Attended	Both
Invitee Cancels Registration	Yes	Events-2018-DMA-Nationwide-SU-Houston	Canceled	Both
Invitee Marked as No-Show	Yes	Events-2018-DMA-Nationwide-SU-Houston	No Show	Both

Member Status

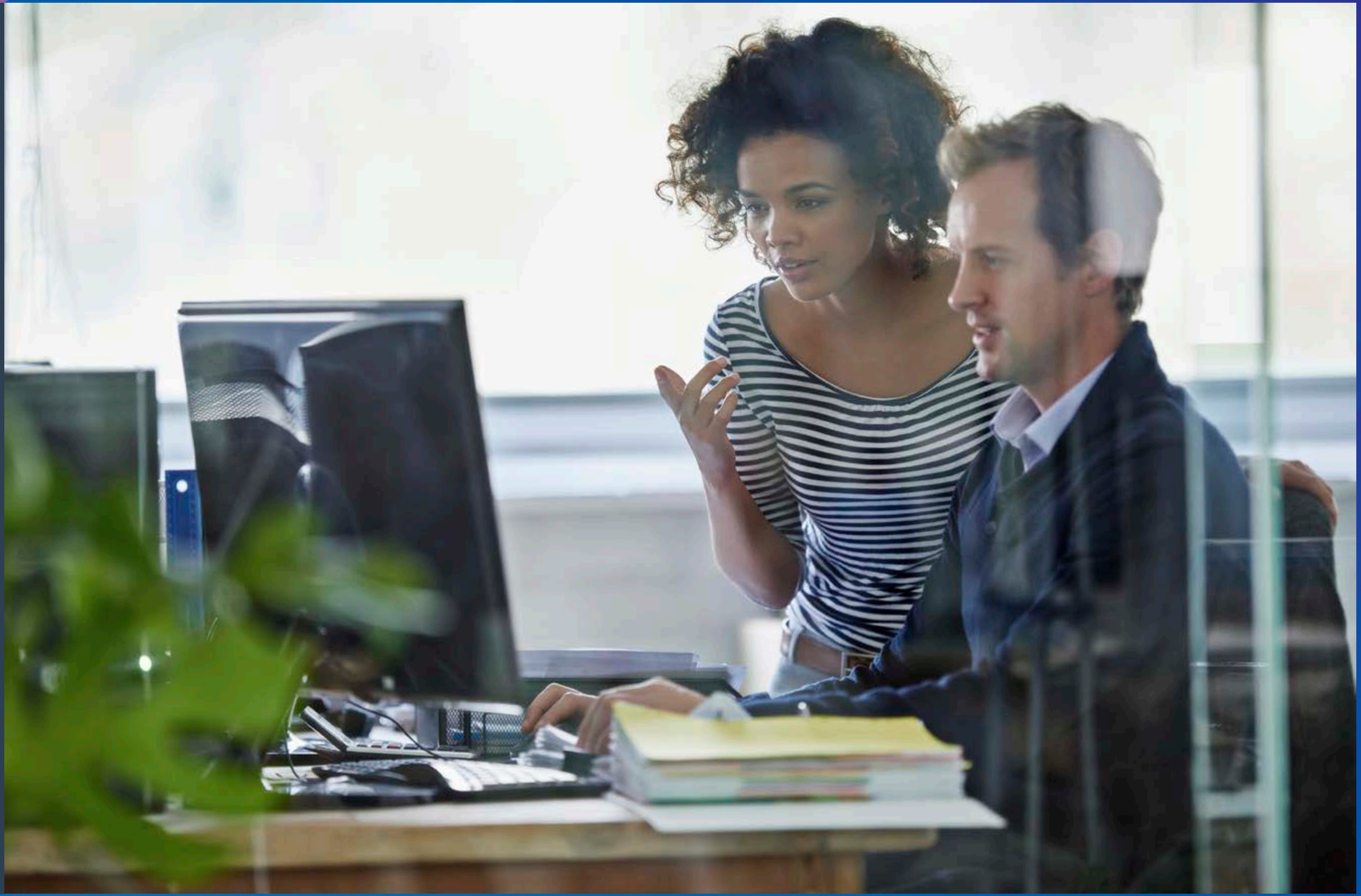
Status	Responded
Sent	☐
Opened	✓
Bounced	✓
Registered	✓
Declined	✓
Attended	✓
Canceled	✓
No Show	✓

Connecting a Campaign

Campaign History | Add to Campaign | Campaign History Help ?

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Edit | Del | View	Email- Texas Amnesty 2018	4/25/2018	Email	Opened 1 Email	✓	6/12/2018 8:20 AM
Edit | Del | View	Events-2018-DMA-Nationwide-SU-Santa-Clara	1/31/2018	Seminar / Conference	Attended	✓	4/2/2018 11:20 AM

How Do I Import Contacts from Salesforce?

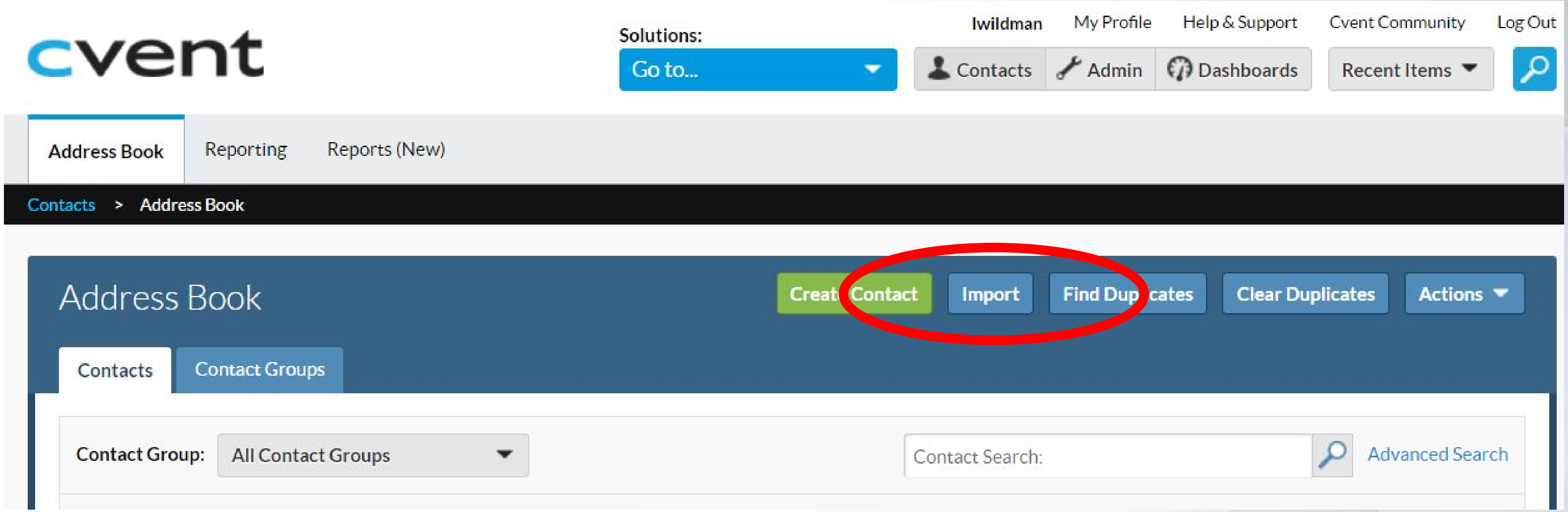


Importing Contacts

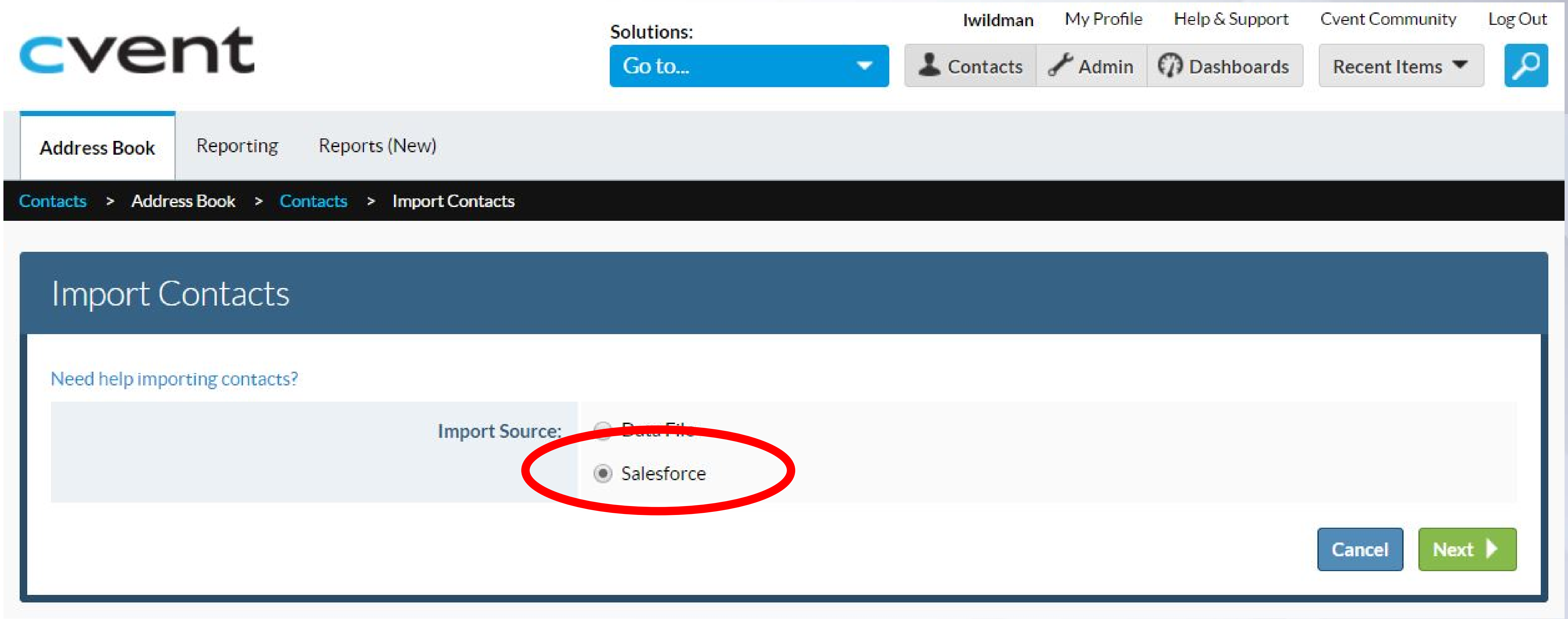
Our rule: If you want to invite someone to an event, they have to be in Salesforce AND you must add them to the Salesforce Campaign.

MUCH easier on our Event Manager!!!

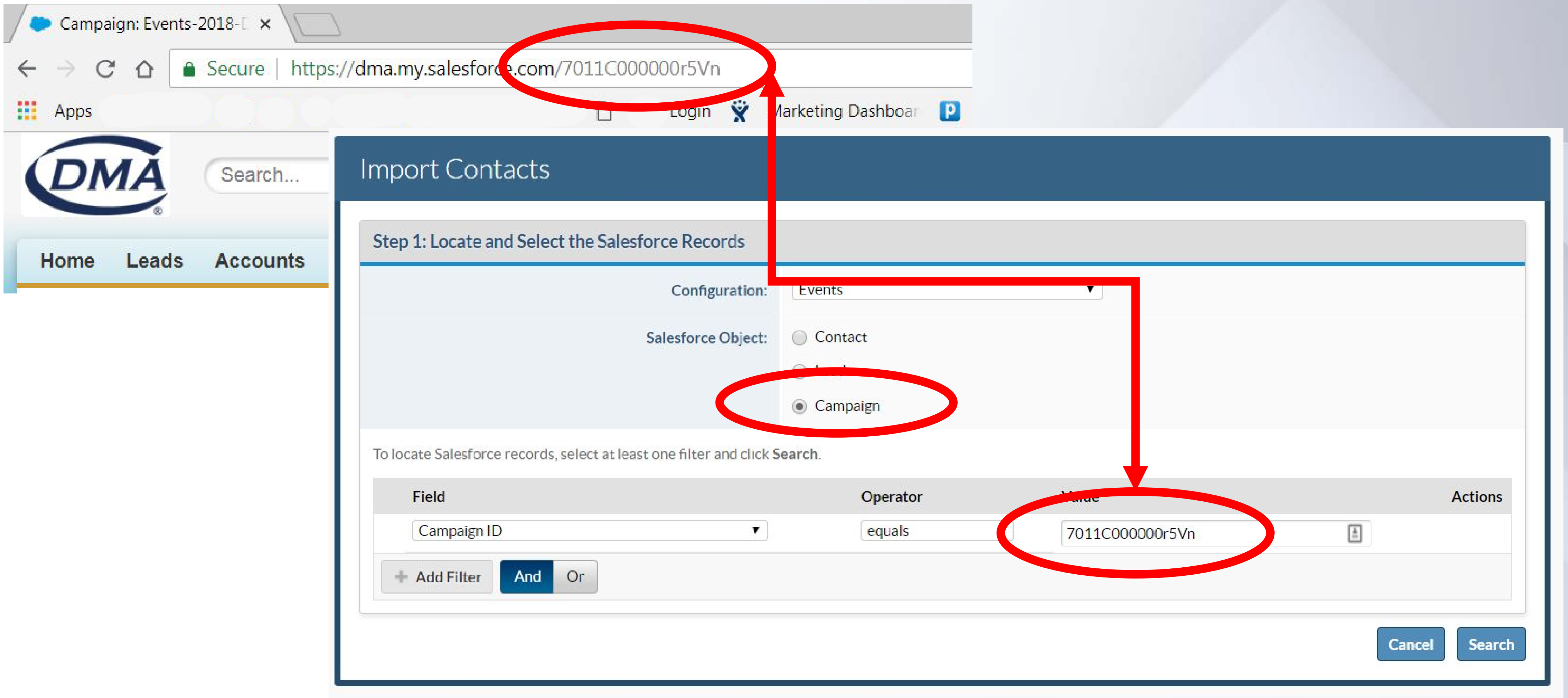
Importing Contacts



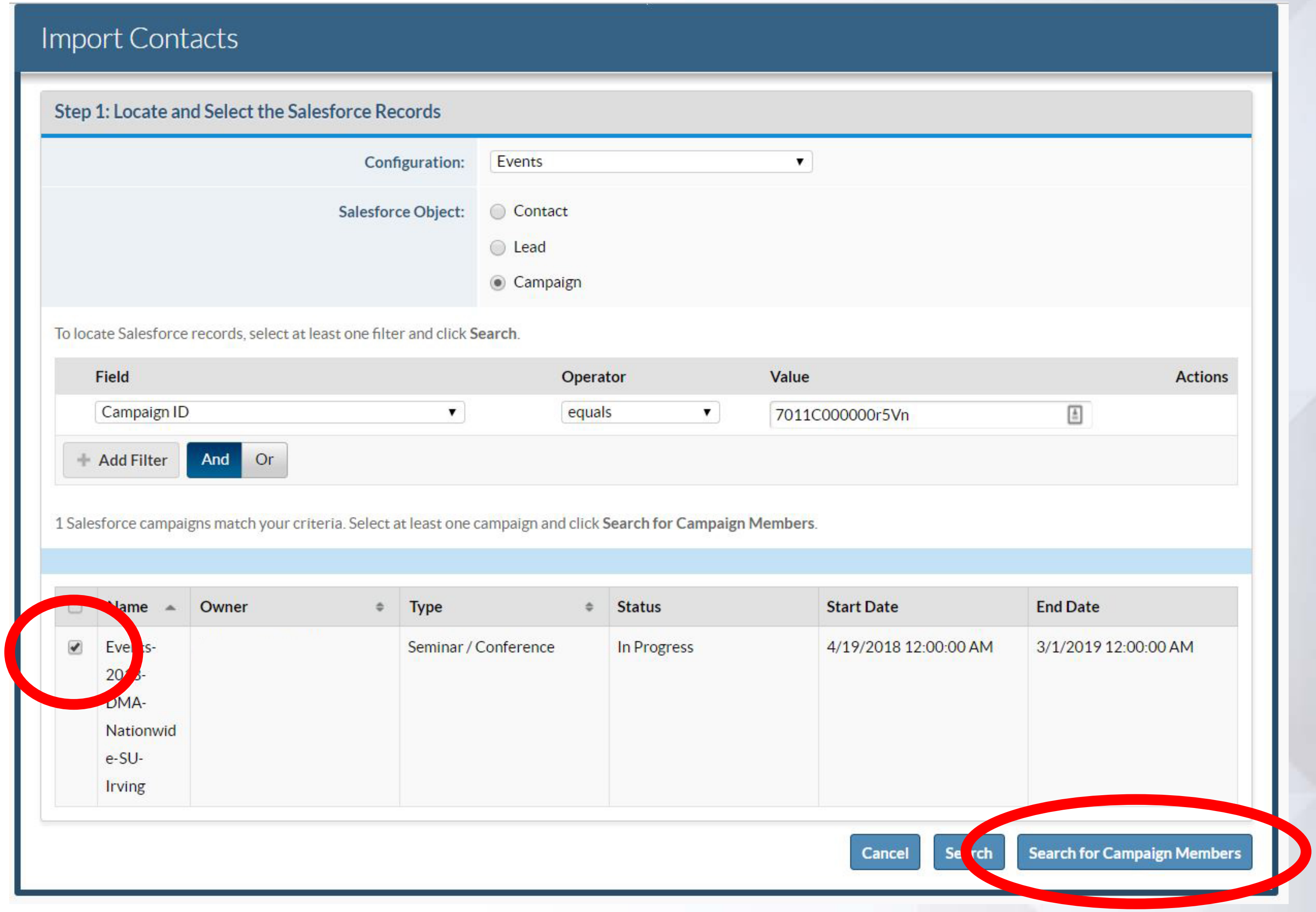
Importing Contacts



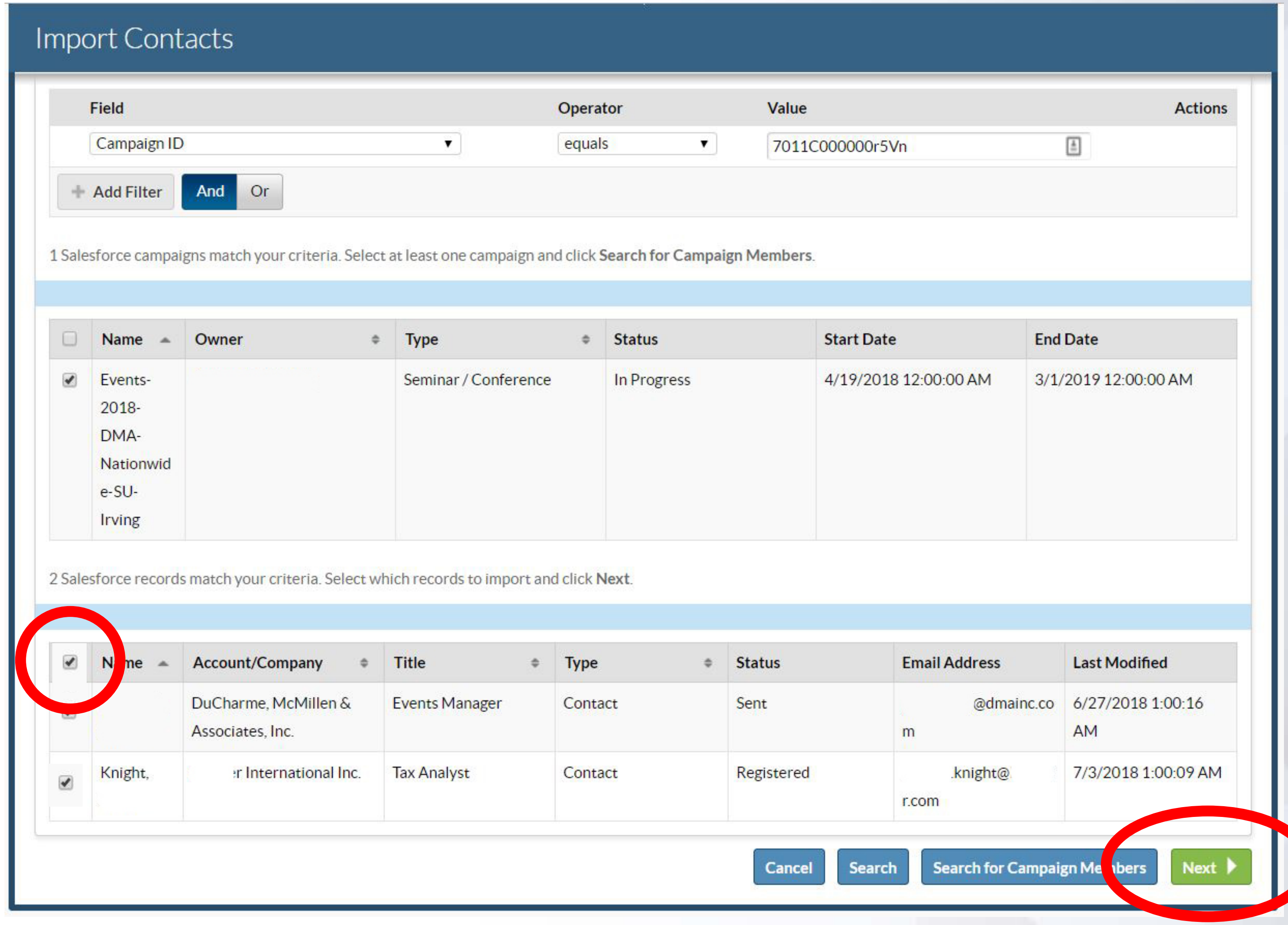
Importing Contacts



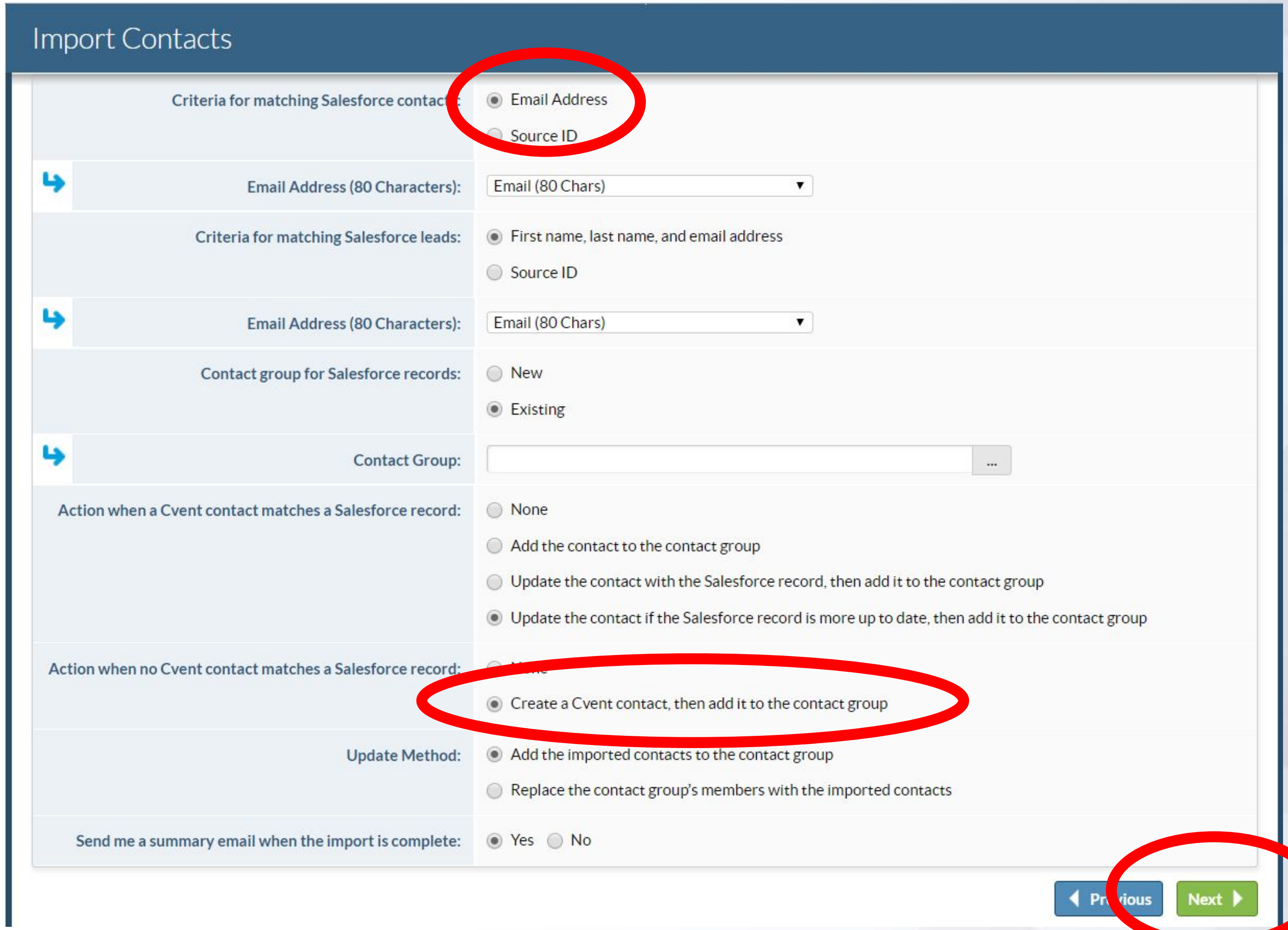
Importing Contacts



Importing Contacts



Importing Contacts



Importing Contacts

Import Contacts

Step 3: Confirm Import Settings

Configuration:	Events
Salesforce Object:	Campaign
Number of records:	0
Criteria for matching Salesforce contacts:	Email Address
Email Address (80 Characters):	Email (80 Chars)
Criteria for matching Salesforce leads:	First name, last name, and email address
Email Address (80 Characters):	Email (80 Chars)
Contact group for Salesforce records:	Existing
Contact Group:	Salesforce Sync 2018.05.04
Action when a Cvent contact matches a Salesforce record:	Update the contact if the Salesforce record is more up to date, then add it to the contact group
Action when no Cvent contact matches a Salesforce record:	Create a Cvent contact, then add it to the contact group
Update Method:	Add the imported contacts to the contact group
Send me a summary email when the import is complete:	Yes

Importing Contacts

Import Contacts

Step 3: Confirm Import Settings

Configuration:	Events
Salesforce Object:	Campaign
Number of records:	0
Criteria for matching Salesforce contacts:	Email Address
Email Address (80 Characters):	Email (80 Chars)
Criteria for matching Salesforce leads:	First name, last name, an
Email Address (80 Characters):	Email (80 Chars)
Contact group for Salesforce records:	Existing
Contact Group:	Salesforce Sync 2018.05
Action when a Cvent contact matches a Salesforce record:	Update the contact if the
Action when no Cvent contact matches a Salesforce record:	Create a Cvent contact, t
Update Method:	Add the imported contac
Send me a summary email when the import is complete:	Yes

Import Contacts

Action when a Cvent contact matches a Salesforce record:	Update the contact if the Salesforce record is more up to date, then add it to the contact group
Action when no Cvent contact matches a Salesforce record:	Create a Cvent contact, then add it to the contact group
Update Method:	Add the imported contacts to the contact group
Send me a summary email when the import is complete:	Yes

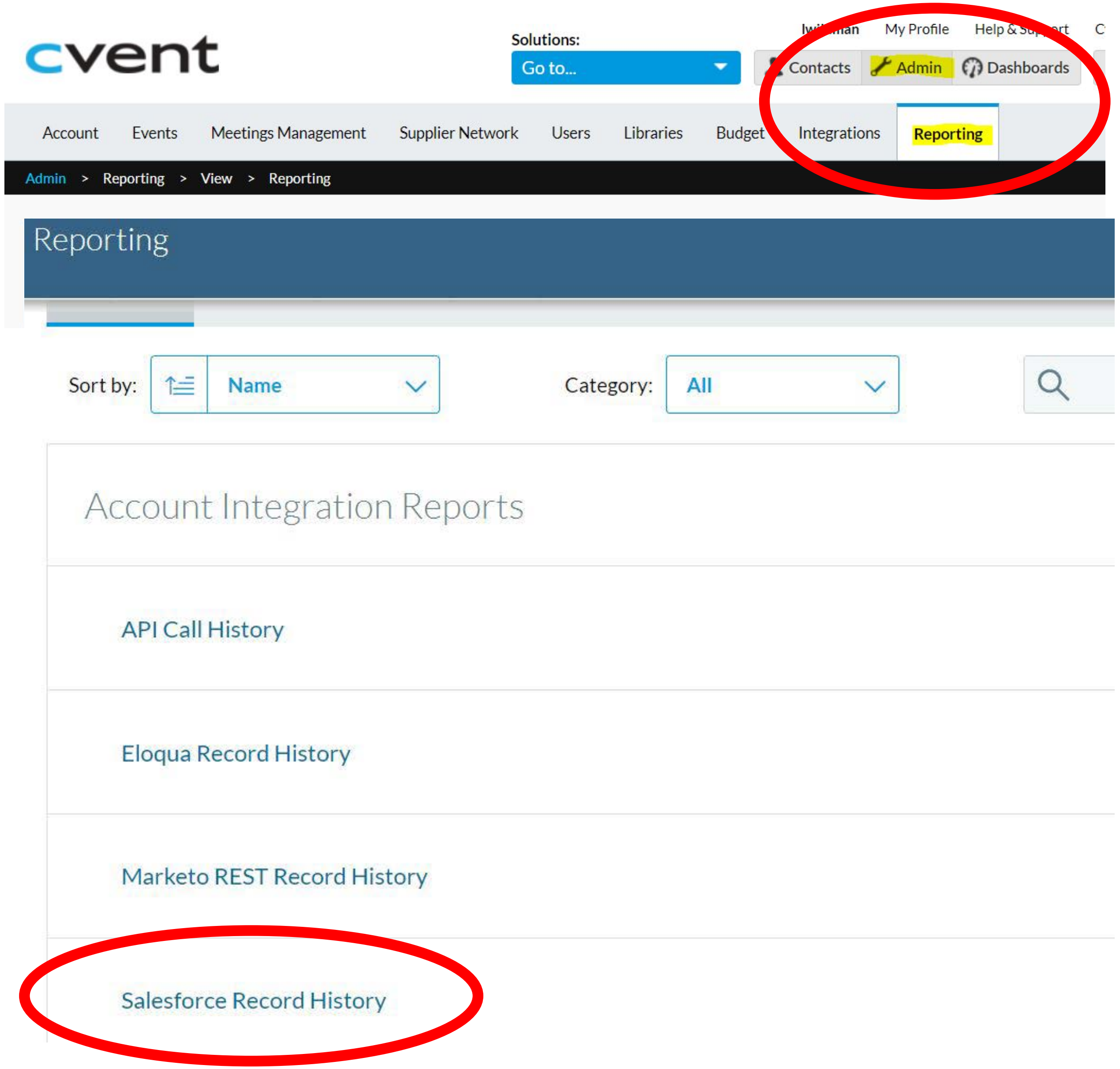
Field Mappings

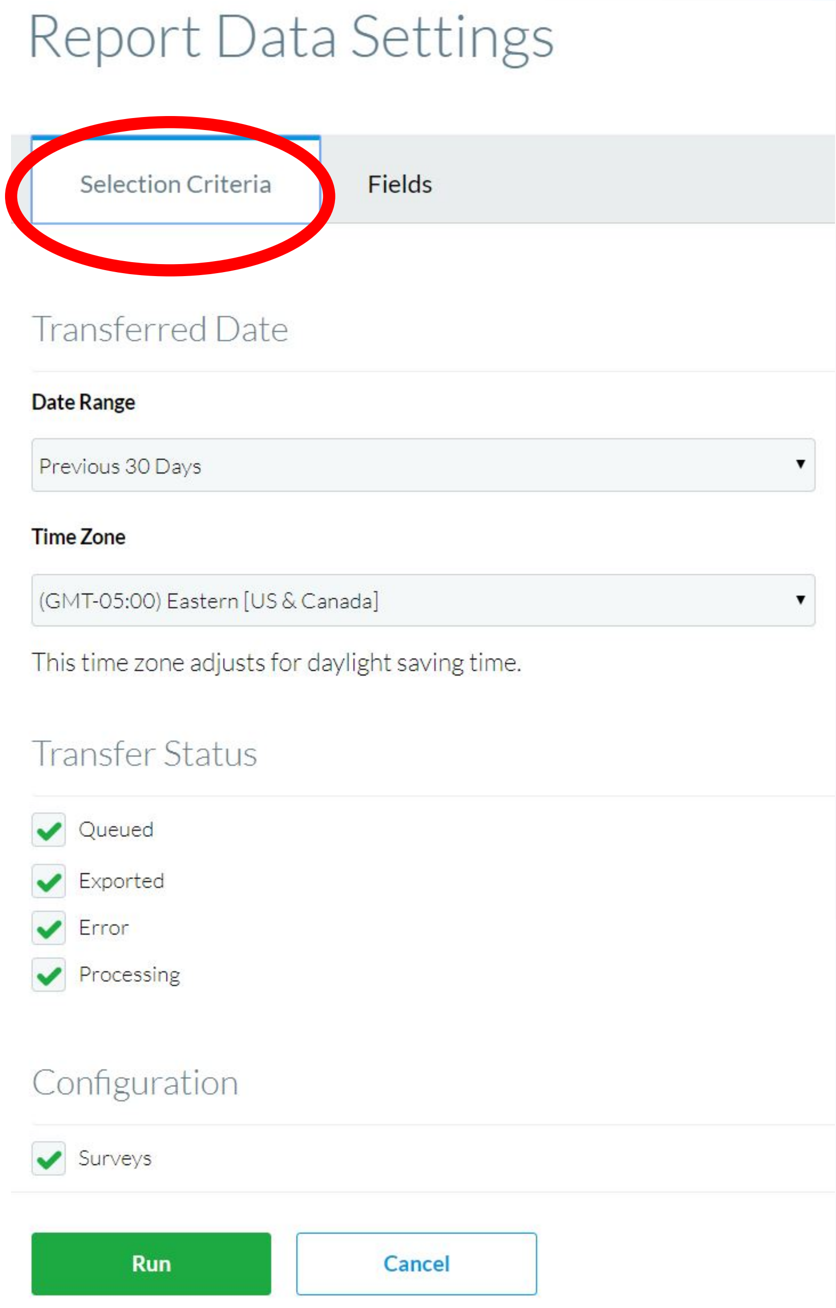
Cvent Field	Salesforce Object	Salesforce Field
Company (100 Chars)	Lead	Company (255 Chars)
Company (100 Chars)	Contact	Account Name (255 Chars)
Confirmed Opted-In (Check box)	Contact and Lead	Email Opt In (Check box)
Contact ID (General)	Contact	Contact ID (18 Chars)
Email (80 Chars)	Contact and Lead	Email (80 Chars)
Email Bounced (Check box)	Contact	Is Email Bounced (Check box)
Email Bounced Date (8 Chars)	Contact and Lead	Email Bounced Date (Date/Time)
Email Bounced Reason (30 Chars)	Contact and Lead	Email Bounced Reason (255 Chars)

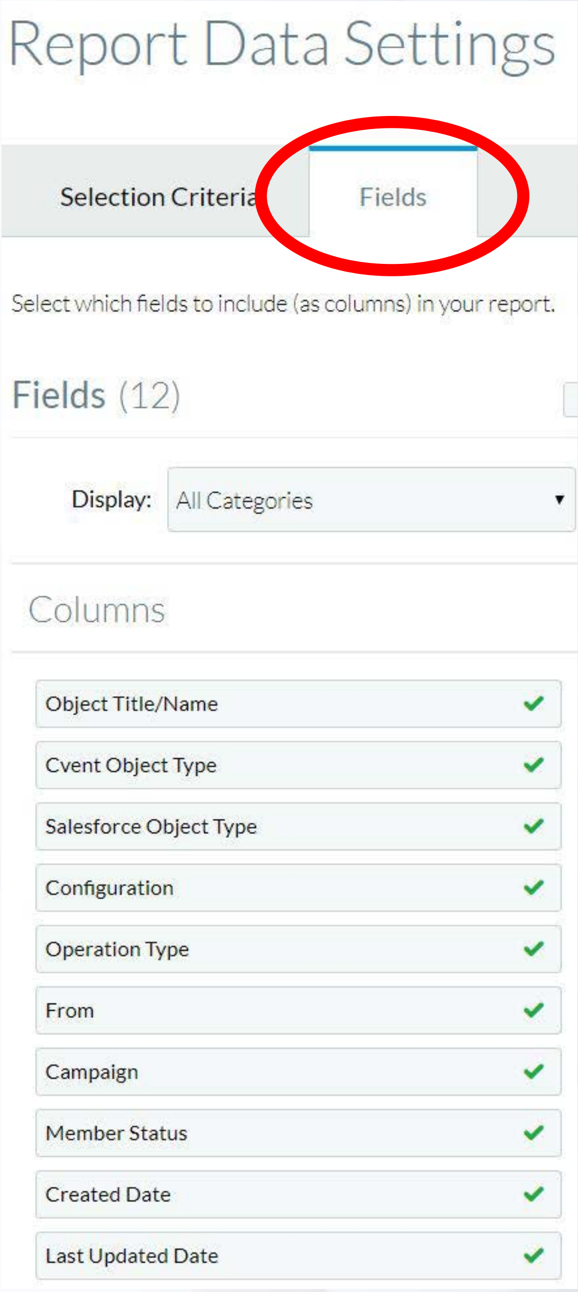
Previous Import

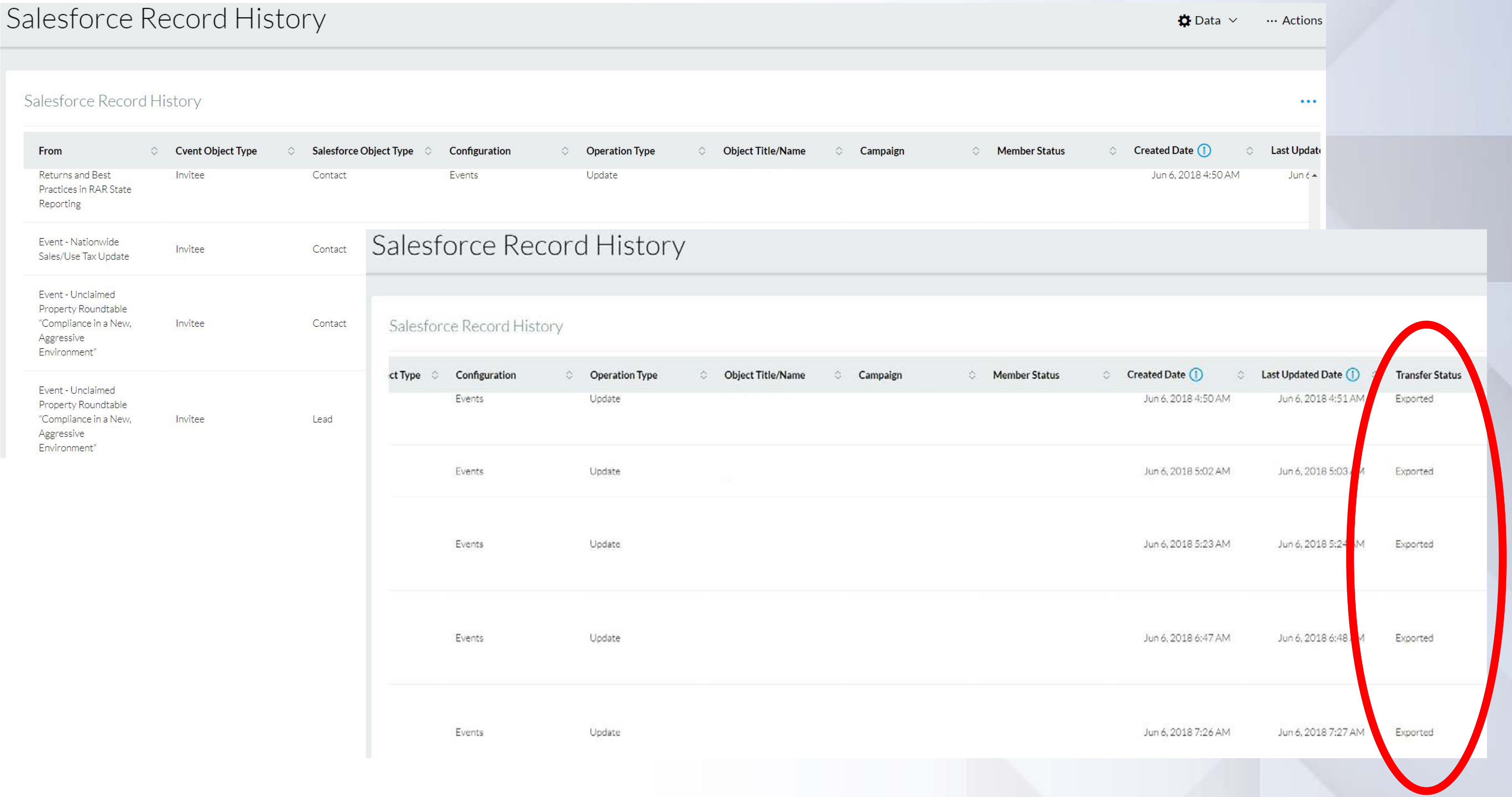
Is It Working?

Run a Salesforce Record History Report to see which contacts and leads transferred.



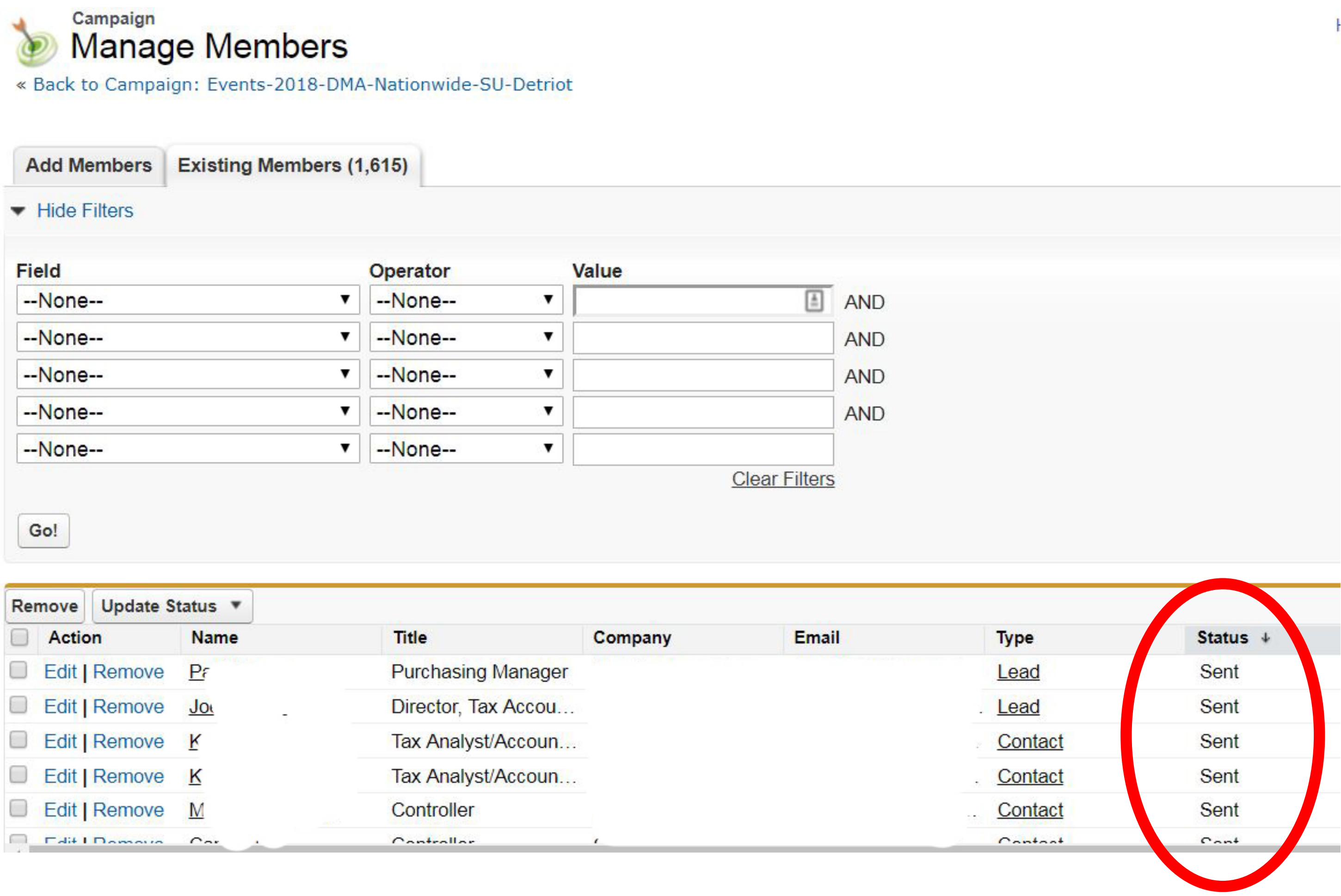

Report Data Settings
Selection Criteria
Fields
Transferred Date
Date Range
Previous 30 Days
Time Zone
(GMT-05:00) Eastern [US & Canada]
This time zone adjusts for daylight saving time.
Transfer Status
Queued
Exported
Error
Processing
Configuration
Surveys
Run
Cancel


Report Data Settings
Selection Criteria
Fields
Select which fields to include (as columns) in your report.
Fields (12)
Display:
All Categories
Columns
Object Title/Name
Cvent Object Type
Salesforce Object Type
Configuration
Operation Type
From
Campaign
Member Status
Created Date
Last Updated Date


Salesforce Record History
Data
Actions
Salesforce Record History
From
Cvent Object Type
Salesforce Object Type
Configuration
Operation Type
Object Title/Name
Campaign
Member Status
Created Date
Returns and Best Practices in RAR State Reporting
Invitee
Contact
Events
Update
Jun 6, 2018 4:50 AM
Event - Nationwide Sales/Use Tax Update
Invitee
Contact
Event - Unclaimed Property Roundtable "Compliance in a New, Aggressive Environment"
Invitee
Contact
Event - Unclaimed Property Roundtable "Compliance in a New, Aggressive Environment"
Invitee
Lead
Salesforce Record History
Salesforce Record History
Configuration
Operation Type
Object Title/Name
Campaign
Member Status
Created Date
Last Updated Date
Transfer Status
Events
Update
Jun 6, 2018 4:50 AM
Jun 6, 2018 4:51 AM
Exported
Events
Update
Jun 6, 2018 5:02 AM
Exported
Events
Update
Jun 6, 2018 5:23 AM
Exported
Events
Update
Jun 6, 2018 6:47 AM
Exported
Events
Update
Jun 6, 2018 7:26 AM
Jun 6, 2018 7:27 AM
Exported

Is It Working?

Check your Salesforce campaign to see if status is updated



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DMA Tax Seminars and Sponsored Events

DMA's professionals share their corporate tax expertise through educational forums across North America. We are frequent presenters for the Tax Executives Institute, the Council on State Taxation, and the Institute for Professionals in Taxation.

DMA is proud to have conducted over 200 educational events throughout North America. We have provided corporate tax updates and education to over 8,000 tax professionals.

Aug 14

COST Property Tax Workshop

Location: Dallas, Texas

DMA is a sponsor and presenter at the Council on State Taxation (COST) Property Tax Workshop, a 2 1/2 day workshop covering the latest property tax issues and trends that companies will be dealing wit...

Learn More

Aug 14

How will you be Impacted? 2019 Texas Legislature & 2017 Federal Tax Reform on States

Location: Houston, Texas

With the 2019 legislative session looming, how will the Texas Legislature address fiscal challenges remaining from Hurricane Harvey, the pressure to reform our school finance and property tax systems?...

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Aug 28

Nationwide Sales/Use Tax and Texas Property Tax Update

Irving, Texas

Tuesday August 28, 2018

DMA is pleased to announce another in our series of complimentary CPE accredited seminars. Corporate tax professionals need to comply with sales/use taxes across the U.S. However, it can be challenging to stay up-to-date with changes in jurisdictions throughout the country. DMA's solution is to bring top sales/use tax professionals from across the nation to meet with tax professionals in Irving , TX.

Learning objectives and discussion topics will include:

- **Nationwide issues and trends with recent developments**
- **Impact of pending federal legislation on state and local taxation**
- **Regional updates in key states as to tax policy changes**
- **Successful audit strategies and tactics**
- **Trends in tax technology for transaction taxes**
- **Exemption certificate guidelines**
- **Texas property tax update**

A sample of some of the topics to be covered:

- **Manufacturing exemptions**
- **Construction**
- **Research and development**
- **Services**
- **Software and cloud computing**
- **Temporary storage**
- **Drop shipments**

Register | View All Events

An Extension of Your Tax Department

Tax Seminar Series

Nationwide Sales/Use Tax and Texas Property Tax Update

August 28, 2018 | Irving, TX

Information

- Event Details
- Presenters
- Testimonials
- Contact Details
- Directions

Register

Register

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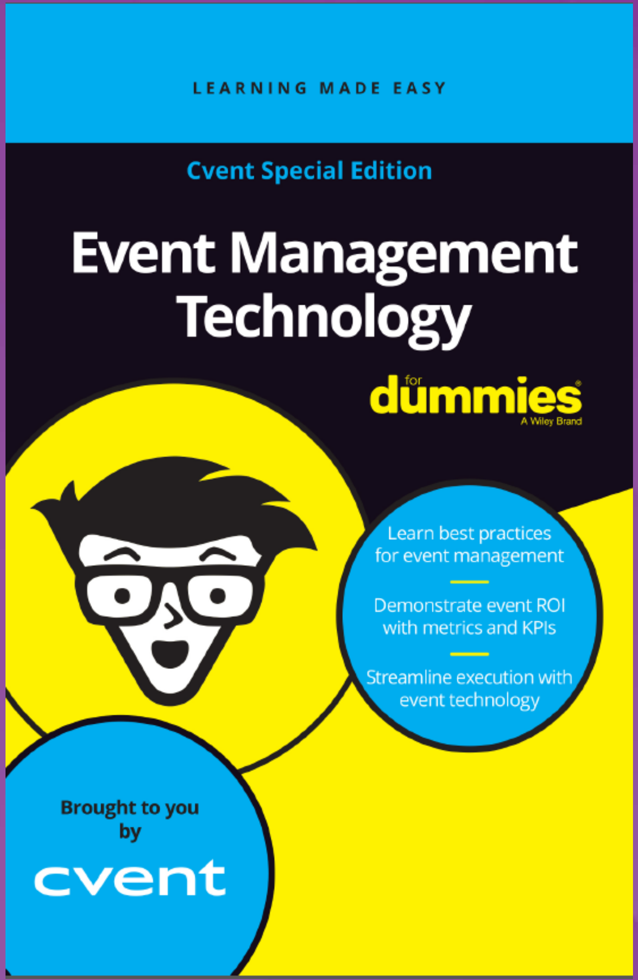
[Success Groups]

[Event Management for Dummies]



Thank You

Lori Wildman| DMA – DuCharme, McMillen & Associates

@LoriWildman | linkedin.com/in/loriwildman
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