

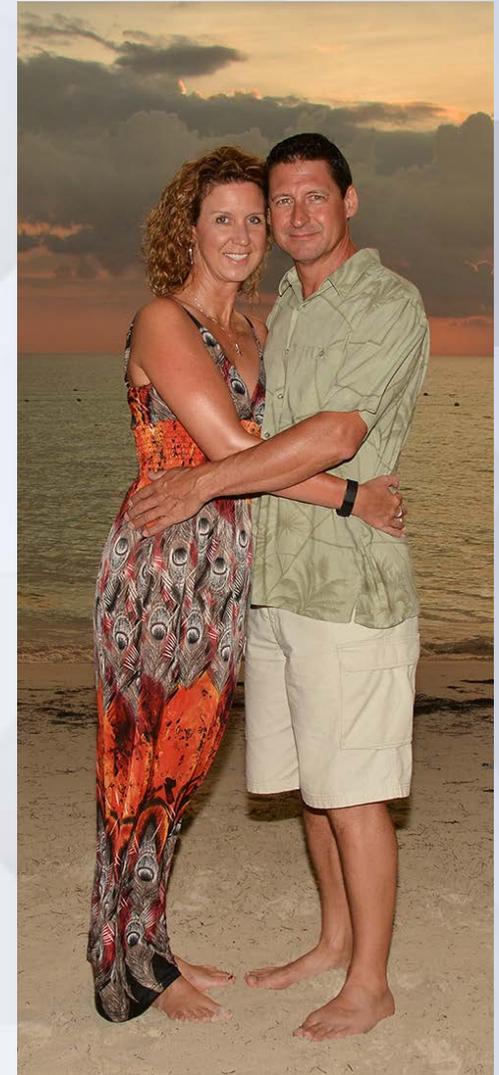
Cvent & Salesforce: Teamwork Makes the Dream Work

Lori Wildman | DMA – DuCharme, McMillen & Associates



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



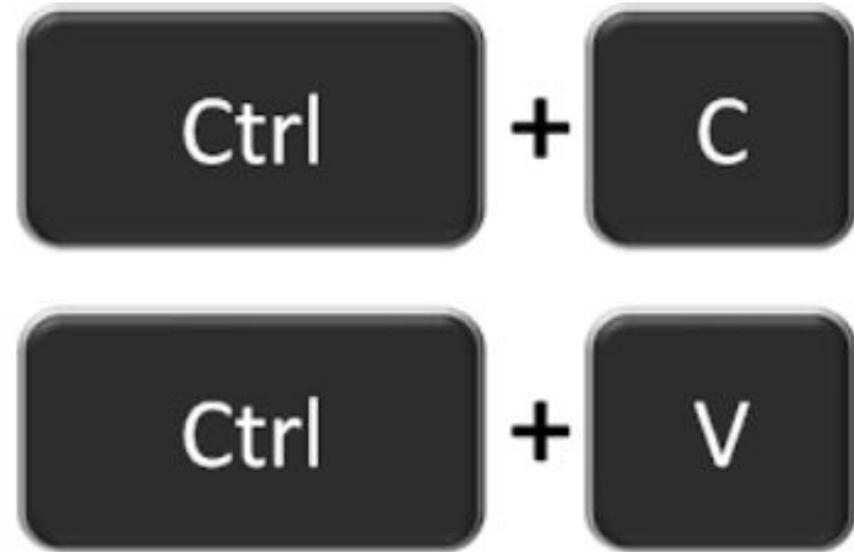
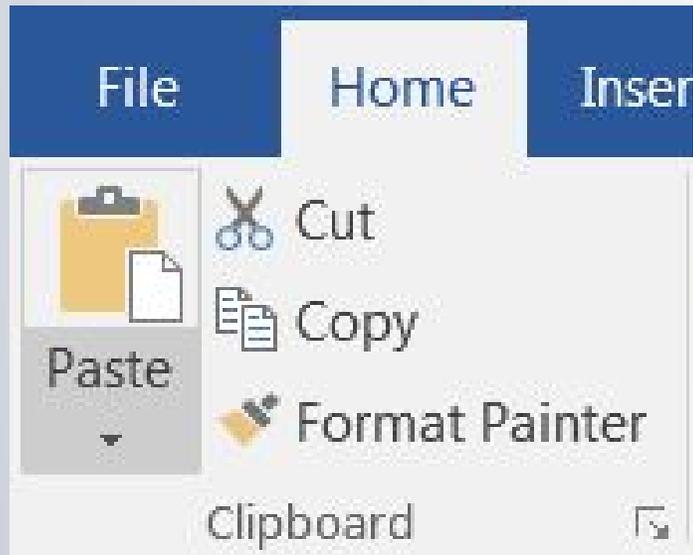
About

- 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

+

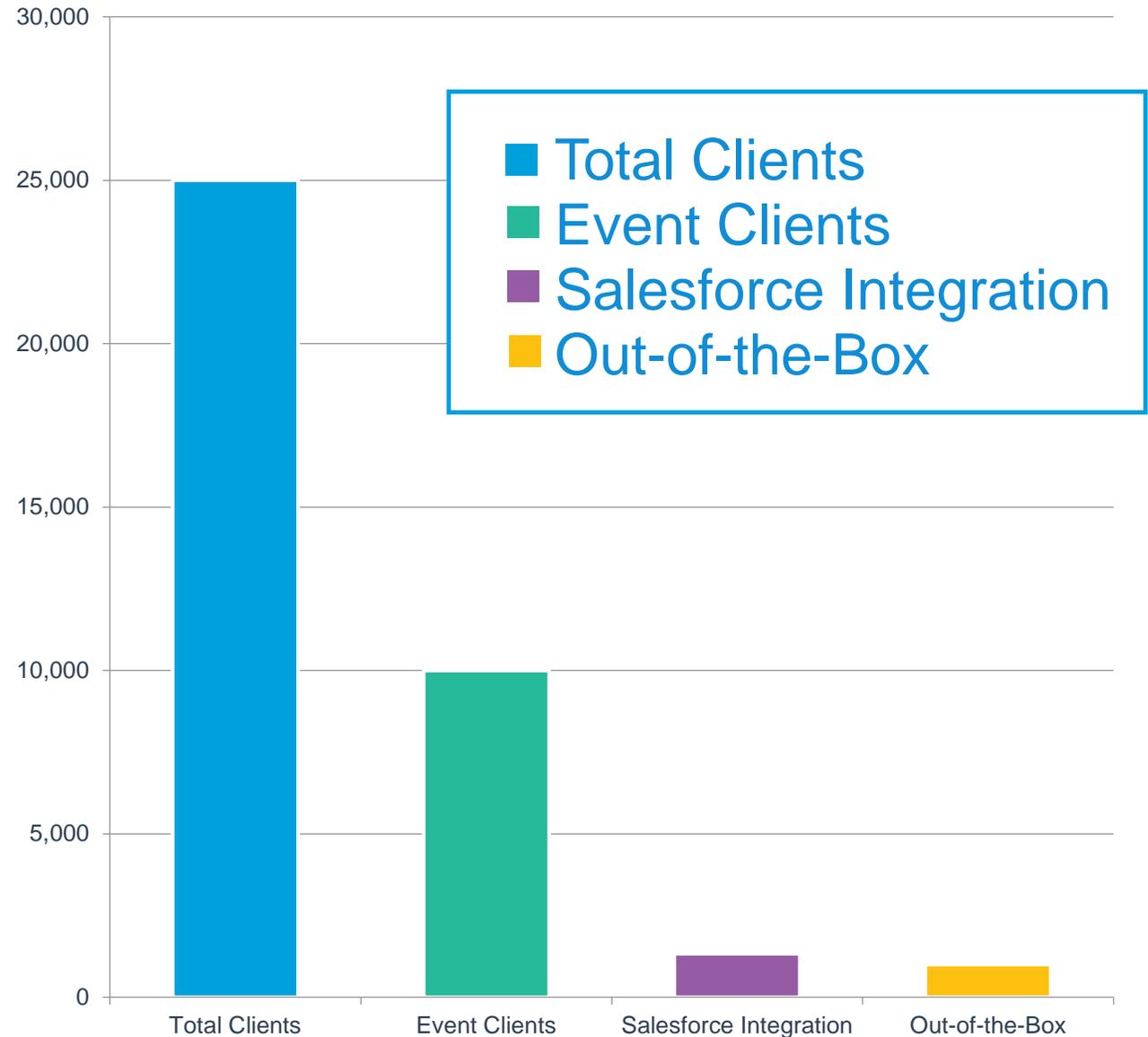
salesforce

INTEGRATION STATS

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

That leaves only
334!!!

Cvent Clients



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

The screenshot displays the Salesforce CRM interface for a contact named Lori Wildman. The top navigation bar includes Home, Leads, Accounts, Contacts (selected), Opportunities, Contracts, Campaigns, Reports, Dashboards, and Forecasts. The left sidebar contains sections for Recent Items, Custom Links, Messages and Alerts, and a Recycle Bin. The main content area shows the contact's profile, including a photo, name, and social media icons. Below the profile is a 'Show Feed' button and a navigation bar for various record types. The 'Contact Detail' section includes buttons for Edit, Delete, Clone, Clean, and Send to Pardot. The contact information is presented in a table format.

Contact Detail		Phone
Name	Lori Wildman	Primary Extension 2528
Title	Senior Marketing Manager	Mobile
Account Name	DuCharme, McMillen & Associates, Inc.	Other Phone
Email	wildman@dmainc.com	Fax
Greeting		Account Phone (260) 484-8631
Type	Employee	Do Not Call <input type="checkbox"/>
Contact Record Type	Locked Contact (Change)	
NLH	<input type="checkbox"/>	
Email Opt Out	<input type="checkbox"/>	
Email Opt In	<input checked="" type="checkbox"/>	
Email Opt in Date	3/2/2018	
Email Opt Out Date		
Contact Role		Reference

Salesforce Definitions

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

The screenshot shows a Salesforce interface for a Lead record. The navigation bar includes Home, Leads (selected), Accounts, Contacts, Opportunities, Contracts, Campaigns, Reports, Dashboards, and Forecasts. The left sidebar contains Recent Items, Custom Links (Salesforce Trailhead), and Messages and Alerts. The main content area displays the Lead Detail for 'Steve', including fields for Name, Title, Company, Lead Owner, Email, and Phone, along with checkboxes for Email Opt Out, Email Opt In, Do Not Call, Mobile, and Fax Opt Out. The Lead Status is 'Open' and the Property Type is 'NLH'. Action buttons for Edit, Delete, Convert, Clone, Find Duplicates, and Clean are visible.

Home Leads Accounts Contacts Opportunities Contracts Campaigns Reports Dashboards Forecasts +

Recent Items

- Stc
- Jol
- Loj
- Me
- jk
- C
- C
- Ik
- Er

Custom Links

- Salesforce Trailhead

Messages and Alerts

Steve

Show Feed

Open Activities [0] | Activity History [0] | Campaign History [1] | Lead History [5+]

Lead Detail

Edit Delete Convert Clone Find Duplicates Clean

Name	Steve	Lead Status	Open
Title	Senior Director, Global Tax	Property Type	NLH
Company			<input type="checkbox"/>
Lead Owner			

▼ Contact Information

Email	S	Phone	
Email Opt Out	<input type="checkbox"/>	Do Not Call	<input type="checkbox"/>
Email Opt In	<input type="checkbox"/>	Mobile	
		Fax	
		Fax Opt Out	<input type="checkbox"/>

Salesforce Definitions

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

The screenshot shows the Salesforce interface for a Campaign. The navigation bar includes 'Contacts', 'Opportunities', 'Contracts', 'Campaigns' (highlighted), 'Reports', 'Dashboards', and 'Forecasts'. The campaign name is 'Events-2018-DMA-Nationwide-SU-Santa-Clara'. Below the name are links for 'Customize Page', 'Printable View', and 'Help for this Page'. A 'Show Feed' button and a 'Back to List' link are also present. A summary bar shows 'Campaign Members [5+]', 'Open Activities [0]', 'Activity History [5+]', 'Influenced Opportunities [0]', 'Campaign Hierarchy [1]', and 'Attachments [0]'. The 'Campaign Detail' section includes buttons for 'Edit', 'Delete', 'Clone', 'Manage Members', 'Advanced Setup', and 'Add to Pardot List'. The details table shows: Campaign Owner (with a user icon and '[Change]'), Campaign Name (with a '[View Hierarchy]' link), Active (checked), Type (Seminar / Conference), Parent Campaign, and Description. The 'Planning' section is expanded, showing: Start Date (1/31/2018), End Date (10/5/2018), Num Sent in Campaign (0), Expected Response (%) (0.00%), Expected Revenue in Campaign, Budgeted Cost in Campaign, and Actual Cost in Campaign. The 'Campaign Statistics' section is also expanded, showing: Responses in Campaign (373), Leads in Campaign (163), Opportunities in Campaign (0), and Won Opportunities in Campaign (0).

Campaign Detail			
Campaign Owner	[User Icon]	[Change]	Status: In Progress
Campaign Name	Events-2018-DMA-Nationwide-SU-Santa-Clara [View Hierarchy]		
Active	<input checked="" type="checkbox"/>		
Type	Seminar / Conference		
Parent Campaign			
Description			

▼ Planning			
Start Date	1/31/2018	Expected Revenue in Campaign	
End Date	10/5/2018	Budgeted Cost in Campaign	
Num Sent in Campaign	0	Actual Cost in Campaign	
Expected Response (%)	0.00%		

▼ Campaign Statistics			
Responses in Campaign	373	Opportunities in Campaign	0
Leads in Campaign	163	Won Opportunities in Campaign	0

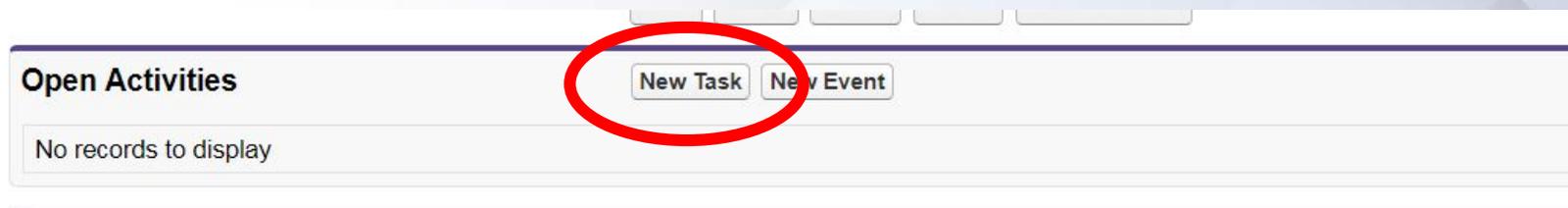
Salesforce Definitions

- 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

The screenshot shows the Salesforce interface for an Opportunity record. The navigation bar at the top includes: Leads, Accounts, Contacts, Opportunities (highlighted), Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, Dashboards, and a plus sign. Below the navigation bar, the record title is 'Opportunity Buy more generators'. On the right side, there are links for 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. Below the title, there are buttons for 'Show Feed' and 'Click to add topics'. A breadcrumb trail reads '<< Back to List: Custom Settings'. Below the breadcrumb, there are links for 'Products [0]', 'Open Activities [0]', 'Activity History [0]', 'Notes & Attachments [0]', 'Contact Roles [0]', 'Partners [0]', 'Competitors [0]', and 'Stage History [1]'. The main section is titled 'Opportunity Detail' and includes buttons for 'Edit', 'Delete', and 'Clone'. The record details are as follows:

Opportunity Owner	Chris Waters [Change]	Amount	\$2,500.00
Private	<input type="checkbox"/>	Expected Revenue	\$1,250.00
Opportunity Name	Buy more generators	Close Date	3/27/2015
Account Name	Mikes Bikes	Next Step	
Type	Existing Customer - Upgrade	Stage	Value Proposition
Lead Source		Probability (%)	50%
Order Number		Primary Campaign Source	
Current Generator(s)		Main Competitor(s)	
Tracking Number		Delivery/Installation Status	
Created By	Chris Waters , 3/23/2015 1:28 PM	Last Modified By	Chris Waters , 3/23/2015 1:28 PM
Description			
Custom Links	Delivery Status		

Setting Up Integration

Ask your Account Manager to help you get started!

The screenshot shows the Cvent Admin interface. At the top, the Cvent logo is on the left, and user information (Iwildman) and navigation links (My Profile, Help & Support, Cvent Community, Log Out) are on the right. Below this is a 'Solutions:' dropdown menu with a 'Go to...' button. A main navigation bar contains links for Account, Events, Meetings Management, Supplier Network, Users, Libraries, Budget, Integrations, and Reporting. The 'Integrations' link is circled in red. A dropdown menu is open under 'Integrations', showing 'Merchant Accounts', 'SOAP API Usage', and 'Salesforce Integration', with the latter also circled in red. Below the navigation bar is a breadcrumb trail: Admin > Integrations > Integrations > Salesforce Integration > Salesforce Integration. The main content area is titled 'Salesforce Integration' and includes an 'Add' button and a 'Reprocess Failed Transfers' button. Below the title, it states 'Below are the Salesforce configurations set up for your account.' and displays a table of configurations.

Configuration		Salesforce Server
Events	Default	Production
Surveys		Production

Salesforce Integration

Admin > Integrations > Integrations > Salesforce Integration > Salesforce Integration

Salesforce Integration

Add

Reprocess Failed Transfers

Below are the Salesforce configurations set up for your account.

Configuration	Default	Salesforce Server
Events	<input checked="" type="checkbox"/>	Production
Surveys	<input type="checkbox"/>	Production

Salesforce Integration

Events Edit Retrieve Salesforce Fields Validate Close

General Settings Record Matching Criteria Field Mappings Integration Points Campaign Management

General Settings

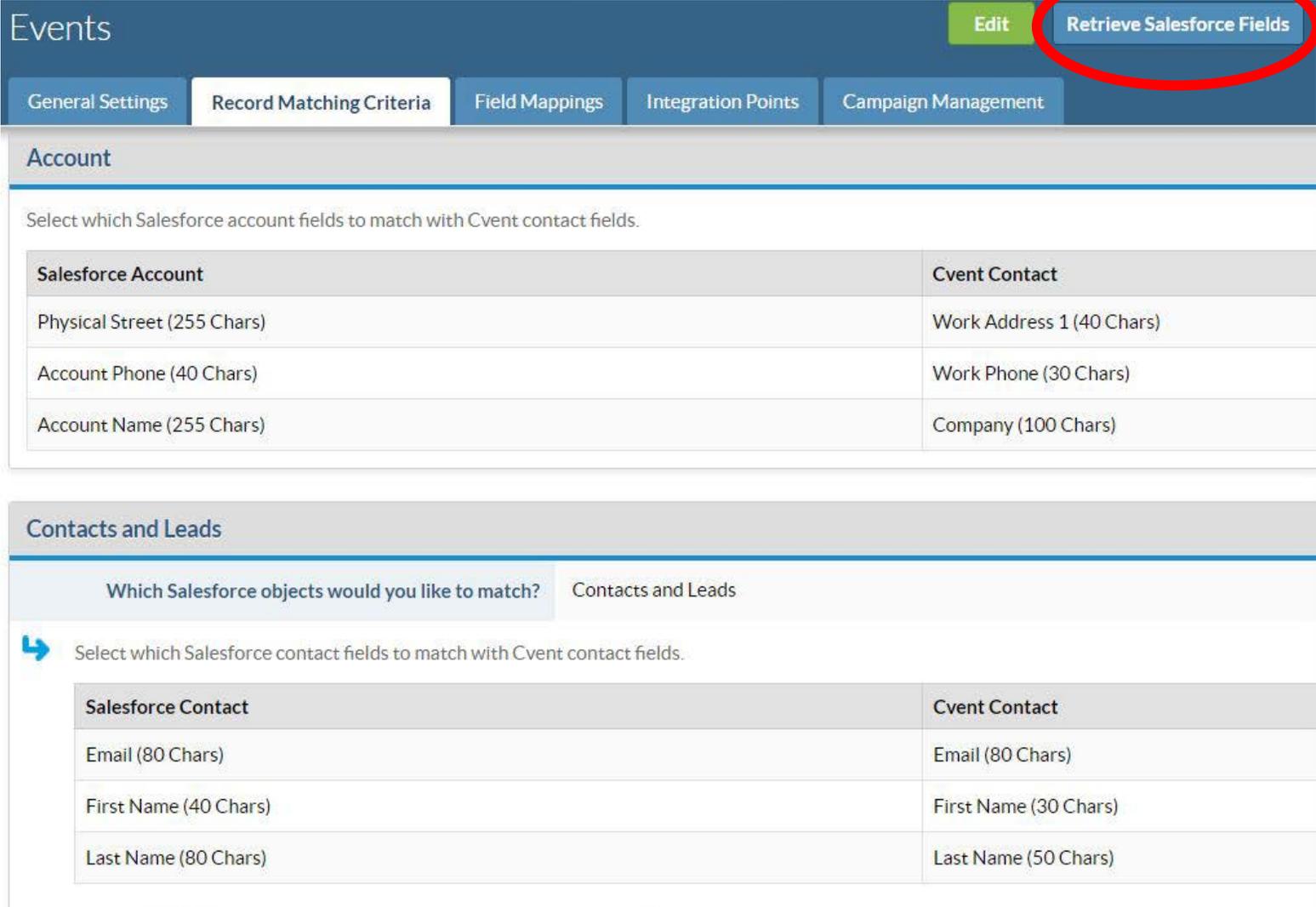
Name:	Events
Salesforce Server:	Production
Default:	Yes

Default Settings

By default, enable the integration for:

All new events:	Yes
All new surveys:	Yes
Address Book:	Yes

Salesforce Integration



The screenshot shows the 'Events' configuration page with a navigation bar containing 'General Settings', 'Record Matching Criteria', 'Field Mappings', 'Integration Points', and 'Campaign Management'. The 'Record Matching Criteria' tab is active. The 'Retrieve Salesforce Fields' button is circled in red.

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

Events Save Cancel

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

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

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

Add Row

Contacts and Leads

Which Salesforce objects would you like to match?

Contacts

Leads

Contacts and Leads

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

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

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	<input type="text" value=""/>	Company ...
* Company (255 Chars)	Lead	Yes	No	<input type="text" value=""/>	Company ...
* Last Name (80 Chars)	Contact and Lead	Yes	No	<input type="text" value=""/>	Last Name ...
Account Phone (1300 Chars)	Contact	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Allow Customer Portal Self-Registration (Check Box)	Contact	No	Yes	<input type="text" value=""/>	<input type="text" value=""/> ...
Annual Revenue (18 Digits)	Lead	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Assistant Email (80 Chars)	Contact	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Assistant's Name (40 Chars)	Contact	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Asst. Phone (40 Chars)	Contact	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Birthdate (Date)	Contact	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Business Fax (40 Chars)	Contact	No	No	<input type="text" value=""/>	<input type="text" value=""/> ...
Business Phone (40 Chars)	Contact	No	No	<input type="text" value=""/>	Work Phone ...
City (40 Chars)	Lead	No	No	<input type="text" value=""/>	Work City ...

Salesforce Integration

Events Save Cancel

[General Settings](#) [Record Matching Criteria](#) [Field Mappings](#) [Integration Points](#) [Campaign Management](#)

Below you can set up your integration points. An integration point is an action in Cvent that triggers actions in Salesforce.

Integration Point	Active
Event	
Invitation is Sent to the Invitee	<input checked="" type="checkbox"/> Yes
Invitee Opens the Invitation Email	<input checked="" type="checkbox"/> Yes
Invitation Email Bounces	<input checked="" type="checkbox"/> Yes
Invitee Registers for the Event	<input checked="" type="checkbox"/> Yes
Invitee Declines Registration	<input checked="" type="checkbox"/> Yes
Invitee Cancels Registration	<input checked="" type="checkbox"/> Yes
Invitee Attends the Event	<input checked="" type="checkbox"/> Yes
Invitee Marked as No-Show	<input checked="" type="checkbox"/> Yes
Survey	
Invitation is Sent to the Respondent	<input checked="" type="checkbox"/> Yes
Respondent Opens the Invitation Email	<input type="checkbox"/> No
Invitation Email Bounces	<input type="checkbox"/> No
Respondent Opens the Survey Page	<input type="checkbox"/> No
Respondent Partially Completes the Survey	<input checked="" type="checkbox"/> Yes
Respondent Completes the Survey	<input checked="" type="checkbox"/> Yes

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	<input type="text"/>	<input type="text"/>	Contact
Invitee Opens the Invitation Email	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitation Email Bounces	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Registers for the Event	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Declines Registration	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Attends the Event	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Cancels Registration	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Marked as No-Show	Yes	<input type="text"/>	<input type="text"/>	Contact
Survey				
Invitation is Sent to the Respondent	Yes	<input type="text"/>	<input type="text"/>	Contact
Respondent Opens the Invitation Email	No	<input type="text"/>	<input type="text"/>	Contact
Invitation Email Bounces	No	<input type="text"/>	<input type="text"/>	Contact
Respondent Opens the Survey Page	No	<input type="text"/>	<input type="text"/>	Contact
Respondent Partially Completes the Survey	Yes	<input type="text"/>	<input type="text"/>	Contact
Respondent Completes the Survey	Yes	<input type="text"/>	<input type="text"/>	Contact
Respondent Disqualified from Survey	Yes	<input type="text"/>	<input type="text"/>	Contact

Salesforce Integration

Events Save Cancel

[General Settings](#) [Record Matching Criteria](#) [Field Mappings](#) [Integration Points](#) [Campaign Management](#)

Below you can set up your integration points. An integration point is an action in Cvent that triggers actions in Salesforce.

Integration Point	Active
Event	
Invitation is Sent to the Invitee	<input checked="" type="checkbox"/> Yes
Invitee Opens the Invitation Email	<input checked="" type="checkbox"/> Yes
Invitation Email Bounces	<input checked="" type="checkbox"/> Yes
Invitee Registers for the Event	<input checked="" type="checkbox"/> Yes
Invitee Declines Registration	<input checked="" type="checkbox"/> Yes
Invitee Cancels Registration	<input checked="" type="checkbox"/> Yes
Invitee Attends the Event	<input checked="" type="checkbox"/> Yes
Invitee Marked as No-Show	<input checked="" type="checkbox"/> Yes
Survey	
Invitation is Sent to the Respondent	<input checked="" type="checkbox"/> Yes
Respondent Opens the Invitation Email	<input checked="" type="checkbox"/> No
Invitation Email Bounces	<input checked="" type="checkbox"/> No
Respondent Opens the Survey Page	<input checked="" type="checkbox"/> No
Respondent Partially Completes the Survey	<input checked="" type="checkbox"/> Yes
Respondent Completes the Survey	<input checked="" type="checkbox"/> Yes

Salesforce Integration

Invitee Attends the Event

Edit

Close

General Information

Single Match Settings

Multiple Match Settings

No Match Settings

Basic Settings

Integration Point: Invitee Attends the Event

Active: Yes

Salesforce Integration

Invitee Attends the Event Edit Close

General Information **Single Match Settings** Multiple Match Settings No Match Settings

Actions on Lead or Contact

Select which actions will occur in Salesforce when a single Salesforce lead or contact is matched with a Cvent contact.

Action performed on match:	Update the matched lead or contact
 Update the Salesforce record only if the Cvent record is more up-to-date:	Yes

Additional Actions

If selected, the following actions will only apply to the most recently updated lead, or a new lead or contact.

Create a task:	No
Create an opportunity:	No

Salesforce Integration

Invitee Attends the Event

Save

Cancel

General Information

Single Match Settings

Multiple Match Settings

No Match Settings

Actions on Lead or Contact

Select which actions will occur in Salesforce when a single Salesforce lead or contact is matched with a Cvent contact.

Action performed on match:

- No action
- Update the matched lead or contact
- Create a contact
- Create a lead



Update the Salesforce record only if the Cvent record is more up-to-date:

- Yes
- No

Salesforce Integration

Additional Actions

If selected, the following actions will only apply to the most recently updated lead, or a new lead or contact.

Create a task: Yes
 No

Create an opportunity: Yes
 No

Salesforce Integration

General Information | Single Match Settings | **Multiple Match Settings** | No Match Settings

Create a task: Yes No

* Subject:

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

Date:

Status: ▼

Priority: ▼

Comment:

Salesforce Integration

Create a task:	<input checked="" type="radio"/> Yes <input type="radio"/> No
* Subject:	Attended Event: {{E-TITLE}} {{E-START DATE}}  
Assigned to:	<input checked="" type="radio"/> Lead owner or contact owner <input type="radio"/> A specific user
Due:	<input type="radio"/> On a specific date <input checked="" type="radio"/> 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}} 

Salesforce Integration

Invitee Attends the Event

Save

Cancel

General Information

Single Match Settings

Multiple Match Settings

No Match Settings

Actions on Lead or Contact

Select which actions will occur in Salesforce when a single Salesforce lead or contact is matched with a Cvent contact.

Action performed on match:

- No action
- Update the matched lead or contact
- Create a contact
- Create a lead



Update the Salesforce record only if the Cvent record is more up-to-date:

- Yes
- No

Salesforce Integration

cvent

Solutions:

Go to...

Iwildman

My Profile

Help & Support

 Contacts

 Admin

 Dashboards

Account

Events

Meetings Management

Supplier Network

Users

Libraries

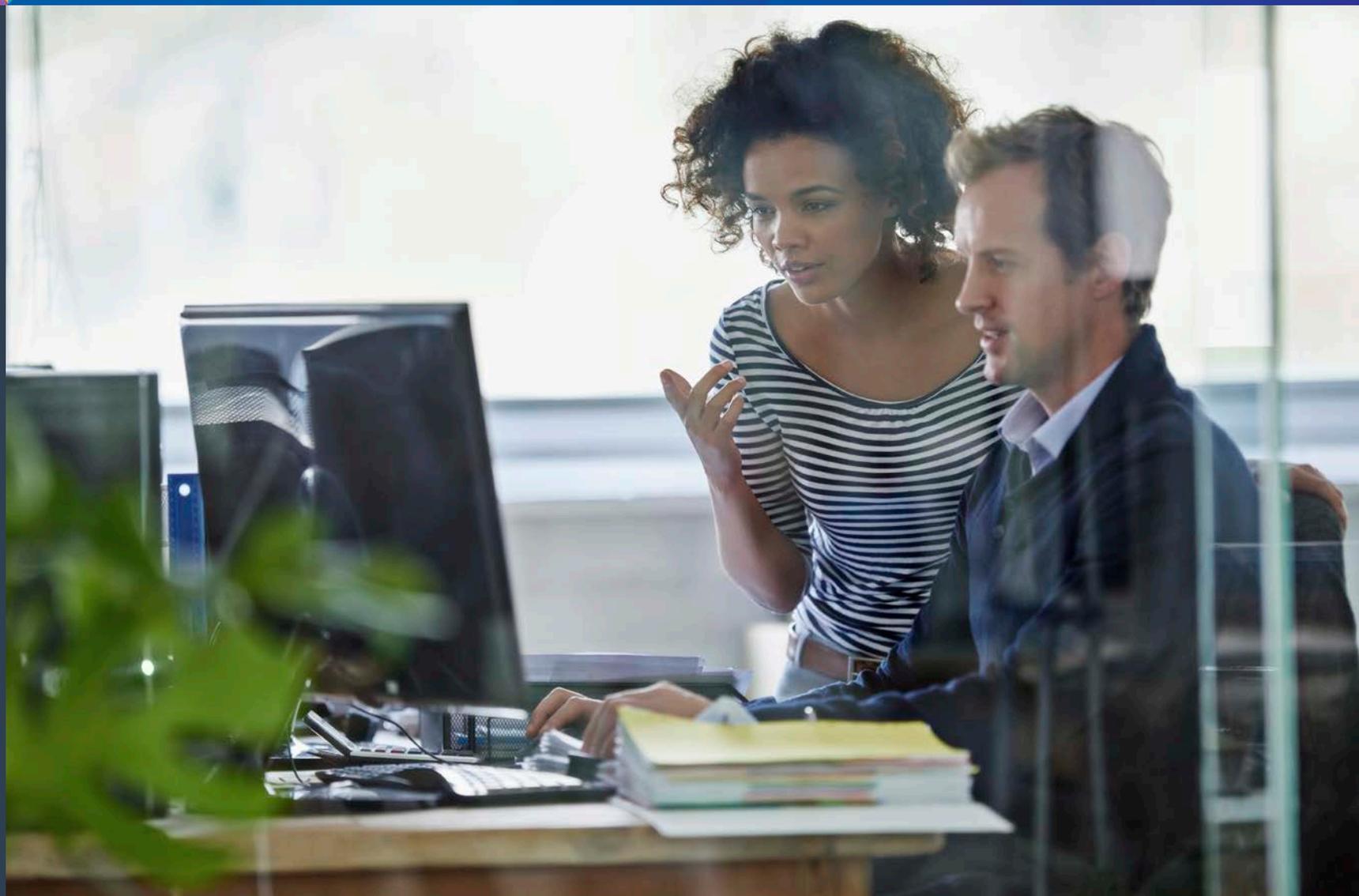
Budget

Integrations

Reporting

[Admin](#) > [Integrations](#) > [Integrations](#) > [Salesforce Integration](#) > [Salesforce Integration](#) > Invitee Attends the Event

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

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	<input checked="" type="checkbox"/>	6/12/2018 8:20 AM
Edit Del View	Events-2018-DMA-Nationwide-SU-Santa-Clara	1/31/2018	Seminar / Conference	Attended	<input checked="" type="checkbox"/>	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	<input type="text"/>	<input type="text"/>	Contact
Invitee Opens the Invitation Email	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitation Email Bounces	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Registers for the Event	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Declines Registration	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Attends the Event	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Cancels Registration	Yes	<input type="text"/>	<input type="text"/>	Contact
Invitee Marked as No-Show	Yes	<input type="text"/>	<input type="text"/>	Contact
Survey				
Invitation is Sent to the Respondent	Yes	<input type="text"/>	<input type="text"/>	Contact
Respondent Opens the Invitation Email	No	<input type="text"/>	<input type="text"/>	Contact
Invitation Email Bounces	No	<input type="text"/>	<input type="text"/>	Contact
Respondent Opens the Survey Page	No	<input type="text"/>	<input type="text"/>	Contact
Respondent Partially Completes the Survey	Yes	<input type="text"/>	<input type="text"/>	Contact
Respondent Completes the Survey	Yes	<input type="text"/>	<input type="text"/>	Contact
Respondent Disqualified from Survey	Yes	<input type="text"/>	<input type="text"/>	Contact

Connecting a Campaign

Contacts Opportunities Contracts **Campaigns** Reports Dashboards Forecasts +

Campaign
Events-2018-DMA-Nationwide-SU-Santa-Clara
[Customize Page](#) | [Printable View](#) | [Help for this P](#)

Show Feed

< Back to List

[Campaign Members](#) [5+] | [Open Activities](#) [0] | [Activity History](#) [5+] | [Influenced Opportunities](#) [0] | [Campaign Hierarchy](#) [1] | [Attachments](#) [0]

Campaign Detail [Edit](#) [Delete](#) [Clone](#) [Manage Members](#) [Advanced Setup](#) [Add to Pardot List](#)

Campaign Owner [Change] Status In Progress

Campaign Name Events-2018-DMA-Nationwide-SU-Santa-Clara [View Hierarchy](#)

Active

Type Seminar / Conference

Parent Campaign

Description

▼ Planning

Start Date	1/31/2018
End Date	10/5/2018
Num Sent in Campaign	0
Expected Response (%)	0.00%

▼ Campaign Statistics

Responses in Campaign	373
Leads in Campaign	163

Home Leads Accounts Contacts Opportunities Contracts **Campaigns** Reports Dashboards Forecasts +

Active Campaigns - Events [Edit](#) | [Delete](#) | [Create New View](#)

[New Campaign](#)

Action	Campaign Name	Type	Created Date	Contacts in Campaign	Leads in Campaign	Status
<input type="checkbox"/> Edit Del +	Events-2018-DMA-Nation...	Seminar / Conference	6/19/2018	1	0	In Progress
<input type="checkbox"/> Edit Del +	Events-2018-DMA-Nation...	Seminar / Conference	6/19/2018	0	0	In Progress
<input type="checkbox"/> Edit Del +	2018-Event	Speaking Engagement	6/1/2018	0	0	Planned
<input type="checkbox"/> Edit Del +	2018-Event	Other	5/25/2018	3	24	In Progress
<input type="checkbox"/> Edit Del +	Event 2018	Other	5/24/2018	0	0	In Progress
<input type="checkbox"/> Edit Del +	Event	Other	5/15/2018	18	0	Completed
<input type="checkbox"/> Edit Del +	Partners	Partners	5/11/2018	0	0	Planned
<input type="checkbox"/> Edit Del +	Email	Email	5/11/2018	105	19	Planned
<input type="checkbox"/> Edit Del +	Event	Public Relations	5/1/2018	0	0	In Progress
<input type="checkbox"/> Edit Del +	Events-2018-DMA-Nation...	Seminar / Conference	4/19/2018	1,235	384	In Progress
<input type="checkbox"/> Edit Del +	Events-2018-DMA-Nation...	Seminar / Conference	4/19/2018	732	144	In Progress

Connecting a Campaign

Campaign Edit
Events-2018-DMA-Nationwide-SU-Santa-Clara

Campaign Edit Save Save & New Cancel

Campaign Information

Campaign Owner Status In Progress ▼

Campaign Name

Active

Type Seminar / Conference ▼

Parent Campaign 

Description

Planning

Start Date	<input type="text" value="1/31/2018"/> [<u>7/2/2018</u>]	Expected Revenue in Campaign	<input type="text"/>
End Date	<input type="text" value="10/5/2018"/> [<u>7/2/2018</u>]	Budgeted Cost in Campaign	<input type="text"/>

Connecting a Campaign

Contacts Opportunities Contracts **Campaigns** Reports Dashboards Forecasts +

Campaign
Events-2018-DMA-Nationwide-SU-Santa-Clara

Customize Page | Printable View | Help for this Page

Show Feed

« Back to List

Campaign Members [5+] | Open Activities [0] | Activity History [5+] | Influenced Opportunities [0] | Campaign Hierarchy [1] | Attachments [0]

Campaign Detail

Edit Delete Clone Manage Member **Advanced Setup** Add to Pardot List

Campaign Owner [Change] Status In Progress

Campaign Name Events-2018-DMA-Nationwide-SU-Santa-Clara
[View Hierarchy]

Active

Type Seminar / Conference

Parent Campaign

Description

▼ **Planning**

Start Date	1/31/2018	Expected Revenue in Campaign	
End Date	10/5/2018	Budgeted Cost in Campaign	
Num Sent in Campaign	0	Actual Cost in Campaign	
Expected Response (%)	0.00%		

▼ **Campaign Statistics**

Responses in Campaign	373	Opportunities in Campaign	0
Leads in Campaign	163	Won Opportunities in Campaign	0

Connecting a Campaign

Current Campaign	2018-Event-Cvent Test	Status	In Progress
Type	Seminar / Conference	Active	<input checked="" type="checkbox"/>

Member Status	Responded *	Default *
<input type="text" value="Sent"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="text" value="Opened"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Bounced"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Registered"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Declined"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Attended"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Canceled"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="No-Show"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Survey Complete"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text" value="Opt-Out"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>

[Add More](#)

Connecting a Campaign

The screenshot displays the Cvent Events management interface. At the top left is the Cvent logo. To the right, there are user navigation links: 'iwildman', 'My Profile', 'Help & Support', 'Event Community', and 'Log Out'. Below these is a 'Solutions:' dropdown menu currently set to 'Events'. Further right are buttons for 'Contacts', 'Admin', 'Dashboards', and 'Recent Items', along with a search icon.

The main navigation bar includes 'Cross Events' (with a dropdown arrow), 'Overview' (the active tab), 'Event Details', 'Website & Registration', 'Promotion & Communication', 'Invitee Management', and 'Reporting'.

The 'Overview' section is divided into five columns:

- General**: Event Information, Event Configuration, Registration Types, **Salesforce Integration** (highlighted with a red circle), Event Status.
- Planning**: Budget, Staff, Tasks, Speakers, Documents, *Session Locations.
- Agenda Items**: *Admission Items, *Sessions, *Session Groups, *Tracks, *Optional Items.
- Pricing**: *Fees, *Discounts, *Service Fees.
- Travel**: Hotel Accommodations, *Air Travel, *Car Rental.

At the bottom right of the interface, a note states: '*Not enabled for this event. To enable these features, please go to [Event Configuration](#).'

Connecting a Campaign

The screenshot shows the Cvent user interface. At the top left is the Cvent logo. To the right, there are user navigation links: 'Solutions:' with a dropdown menu currently set to 'Events', and links for 'Iwildman', 'My Profile', 'Help & Support', 'Cvent Community', and 'Log Out'. Below these are buttons for 'Contacts', 'Admin', 'Dashboards', and 'Recent Items'. A search icon is also present.

The main navigation bar includes 'Cross Events', 'Overview', 'Event Details' (which is selected), 'Website & Registration', 'Promotion & Communication', 'Invitee Management', and 'Reporting'. Below this is a breadcrumb trail: 'Events > Nationwide Sales/Use Tax and Texas Property Tax Update > Event Details > General > Salesforce Integration'. There are 'Preview' and 'Info' icons at the end of the breadcrumb.

The 'Salesforce Integration' section has a title and four buttons: 'Edit', 'Copy Account Level Settings' (circled in red), 'Validate', and 'Create Campaign'. Below the title are four tabs: 'General Settings', 'Field Mappings' (selected), 'Integration Points', and 'Campaign Management'.

A text block states: 'The following field mappings will be used when data is transferred from one application to the other.'

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
Business Phone (40 Chars)	Contact	No	No		Work Phone

Connecting a Campaign

The screenshot displays the Salesforce Campaign Management interface. At the top, there are tabs for 'Integration Points' and 'Campaign Management', with 'Campaign Management' selected. A 'Save' button and a 'Cancel' button are visible in the top right corner. Below the tabs, there is a text prompt: 'Choose a campaign to update, which status to assign to new and updated campaign records, and which campaign records to update.'

On the left side, there is a table with two rows. The first row has 'Active' in the first column, 'Salesforce Campaign' in the second column, and 'M' in the third column. The second row has 'Yes' in the first column, 'Events-2018-DMA-Nation' in the second column, and 'S' in the third column. The third row has 'Yes' in the first column, 'Events-2018-DMA-Nation' in the second column, and 'S' in the third column. The 'Events-2018-DMA-Nation' text in both rows is circled in red.

Below this, there is a table with an 'Apply to All...' button at the top left. The table has the following columns: 'Integration Point', 'Active', 'Salesforce Campaign', 'Member Status', and 'Updated Record'. The 'Salesforce Campaign' and 'Member Status' columns in the first two rows are circled in red.

Integration Point	Active	Salesforce Campaign	Member Status	Updated Record
Invitation is Sent to the Invitee	Yes	Events-2018-DMA-Nation	Sent	Both
Invitee Opens the Invitation Email	Yes	Events-2018-DMA-Nation	Open Invitation	Both
Invitation Email Bounces	Yes	Events-2018-DMA-Nation	Bounced	Both
Invitee Registers for the Event	Yes	Events-2018-DMA-Nation	Registered	Both
Invitee Declines Registration	Yes	Events-2018-DMA-Nation	Declines Invitation	Both
Invitee Attends the Event	Yes	Events-2018-DMA-Nation	Attended	Both
Invitee Cancels Registration	Yes	Events-2018-DMA-Nation	Cancel	Both
Invitee Marked as No-Show	Yes	Events-2018-DMA-Nation	No Show	Both

Connecting a Campaign

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	Member Status	Member Status
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

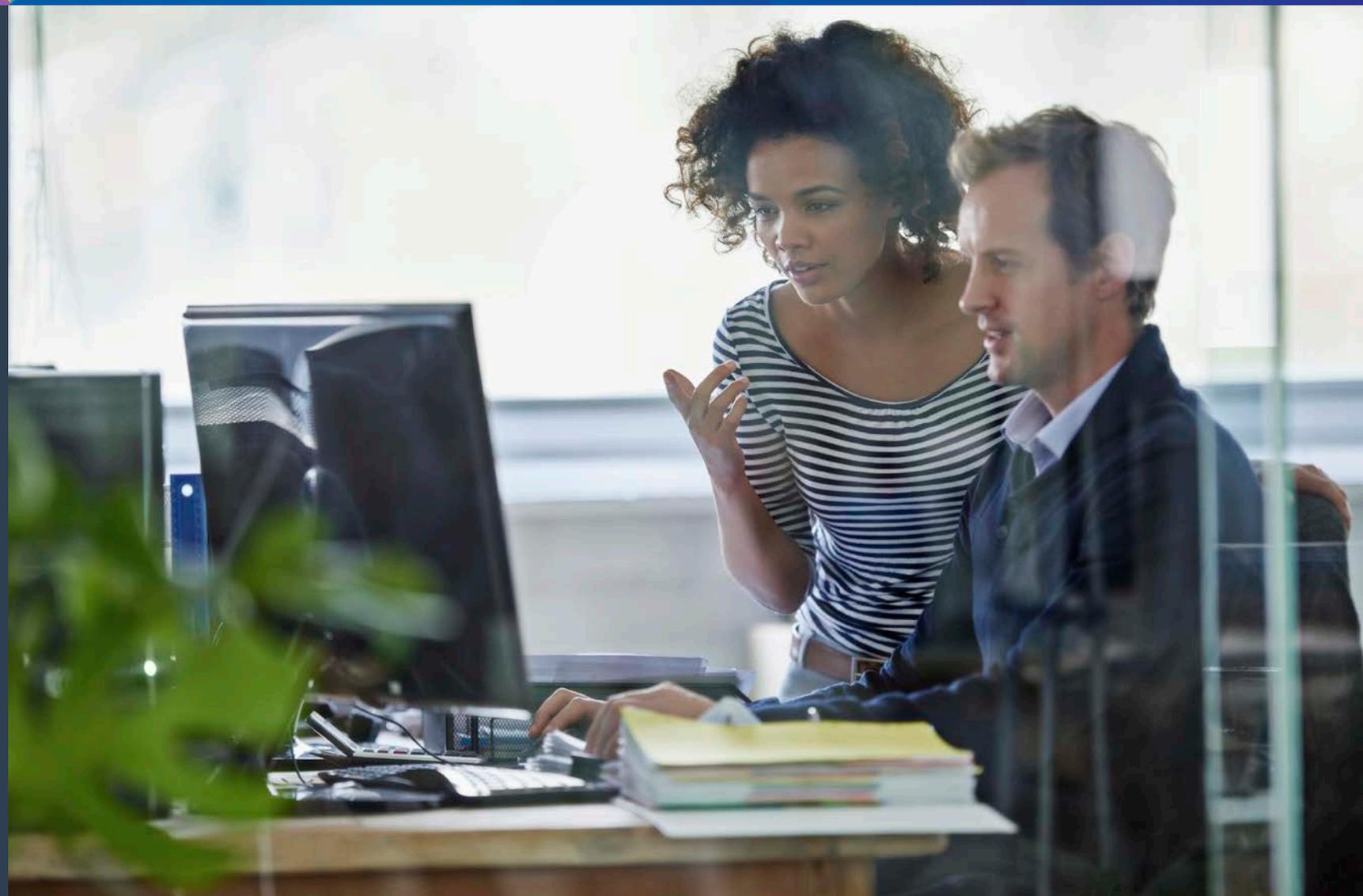
Status	Responded
Sent	<input type="checkbox"/>
Opened	<input checked="" type="checkbox"/>
Bounced	<input checked="" type="checkbox"/>
Registered	<input checked="" type="checkbox"/>
Declined	<input checked="" type="checkbox"/>
Attended	<input checked="" type="checkbox"/>
Canceled	<input checked="" type="checkbox"/>
No Show	<input checked="" type="checkbox"/>

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	<input checked="" type="checkbox"/>	6/12/2018 8:20 AM
Edit Del View	Events-2018-DMA-Nationwide-SU-Santa-Clara	1/31/2018	Seminar Conference	Attended	<input checked="" type="checkbox"/>	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

The screenshot displays the Cvent web interface for the Address Book. At the top left is the Cvent logo. To its right is a 'Solutions:' dropdown menu with 'Go to...' and a search icon. Further right are user links: 'Iwildman', 'My Profile', 'Help & Support', 'Cvent Community', and 'Log Out'. Below these are navigation buttons: 'Contacts', 'Admin', 'Dashboards', 'Recent Items', and another search icon. A secondary navigation bar contains 'Address Book', 'Reporting', and 'Reports (New)'. A breadcrumb trail shows 'Contacts > Address Book'. The main header area for the 'Address Book' section includes a 'Create Contact' button (highlighted with a red circle), 'Import', 'Find Duplicates', 'Clear Duplicates', and an 'Actions' dropdown. Below this are tabs for 'Contacts' and 'Contact Groups'. At the bottom, there is a 'Contact Group:' dropdown set to 'All Contact Groups' and a 'Contact Search:' input field with an 'Advanced Search' link.

Importing Contacts

cvent

Solutions:

Go to...

Iwildman

My Profile

Help & Support

Cvent Community

Log Out



Contacts



Admin



Dashboards

Recent Items



Address Book

Reporting

Reports (New)

Contacts > Address Book > Contacts > Import Contacts

Import Contacts

Need help importing contacts?

Import Source:

Data File

Salesforce

Cancel

Next

Importing Contacts

The screenshot shows the Salesforce 'Import Contacts' interface. The browser address bar contains the URL `https://dma.my.salesforce.com/7011C000000r5Vn`, which is circled in red. A red arrow points from this URL to the 'Configuration' dropdown menu, which is also circled in red. Below the configuration, the 'Salesforce Object' section has the 'Campaign' radio button selected, also circled in red. A red arrow points from the 'Campaign' selection to the 'Value' field in the filter table, which contains the ID '7011C000000r5Vn' and is circled in red. The filter table has columns for Field, Operator, Value, and Actions. Below the table are buttons for '+ Add Filter', 'And', and 'Or'. At the bottom right are 'Cancel' and 'Search' buttons.

Configuration: Events

Salesforce Object: Contact Campaign

To locate Salesforce records, select at least one filter and click Search.

Field	Operator	Value	Actions
Campaign ID	equals	7011C000000r5Vn	

+ Add Filter And Or

Cancel Search

Importing Contacts

Import Contacts

Step 1: Locate and Select the Salesforce Records

Configuration:

Salesforce Object: Contact Lead Campaign

To locate Salesforce records, select at least one filter and click Search.

Field	Operator	Value	Actions
<input type="text" value="Campaign ID"/>	<input type="text" value="equals"/>	<input type="text" value="7011C000000r5Vn"/>	

1 Salesforce campaigns match your criteria. Select at least one campaign and click Search for Campaign Members.

<input type="checkbox"/>	Name	Owner	Type	Status	Start Date	End Date
<input checked="" type="checkbox"/>	Events-2018-DMA-Nationwide-SU-Irving		Seminar / Conference	In Progress	4/19/2018 12:00:00 AM	3/1/2019 12:00:00 AM

Importing Contacts

Import Contacts

Field	Operator	Value	Actions
Campaign ID	equals	7011C000000r5Vn	

+ Add Filter And Or

1 Salesforce campaigns match your criteria. Select at least one campaign and click Search for Campaign Members.

<input type="checkbox"/>	Name	Owner	Type	Status	Start Date	End Date
<input checked="" type="checkbox"/>	Events-2018-DMA-Nationwide-SU-Irving		Seminar / Conference	In Progress	4/19/2018 12:00:00 AM	3/1/2019 12:00:00 AM

2 Salesforce records match your criteria. Select which records to import and click Next.

<input checked="" type="checkbox"/>	Name	Account/Company	Title	Type	Status	Email Address	Last Modified
<input checked="" type="checkbox"/>		DuCharme, McMillen & Associates, Inc.	Events Manager	Contact	Sent	@dmainc.com	6/27/2018 1:00:16 AM
<input checked="" type="checkbox"/>	Knight,	International Inc.	Tax Analyst	Contact	Registered	.knight@r.com	7/3/2018 1:00:09 AM

Cancel Search Search for Campaign Members Next

Importing Contacts

Import Contacts

Criteria for matching Salesforce contacts: Email Address Source ID

→ Email Address (80 Characters): Email (80 Chars)

Criteria for matching Salesforce leads: First name, last name, and email address Source ID

→ Email Address (80 Characters): Email (80 Chars)

Contact group for Salesforce records: New Existing

→ Contact Group:

Action when a Cvent contact matches a Salesforce record: None Add the contact to the contact group Update the contact with the Salesforce record, then add it to the contact group 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: Do nothing Create a Cvent contact, then add it to the contact group

Update Method: Add the imported contacts to the contact group Replace the contact group's members with the imported contacts

Send me a summary email when the import is complete: Yes No

← Previous Next →

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, 1
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)

Is It Working?

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

The screenshot displays the cvent web application interface. At the top left is the 'cvent' logo. To the right, there are navigation links for 'Solutions: Go to...', 'My Profile', 'Help & Support', 'Contacts', 'Admin', and 'Dashboards'. Below this is a main navigation bar with links for 'Account', 'Events', 'Meetings Management', 'Supplier Network', 'Users', 'Libraries', 'Budget', 'Integrations', and 'Reporting'. The 'Reporting' link is highlighted in yellow and circled in red. Below the navigation bar is a breadcrumb trail: 'Admin > Reporting > View > Reporting'. The main content area is titled 'Reporting' and contains a search bar and filters. The 'Sort by:' dropdown is set to 'Name' and the 'Category:' dropdown is set to 'All'. Below these are several report categories listed in a table:

Account Integration Reports
API Call History
Eloqua Record History
Marketo REST Record History
Salesforce Record History

The 'Salesforce Record History' report is circled in red.

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

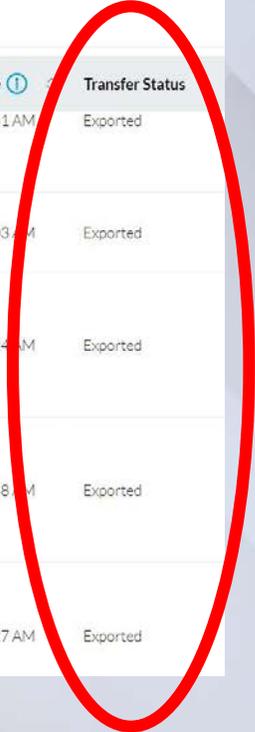
Salesforce Record History

From	Event Object Type	Salesforce Object Type	Configuration	Operation Type	Object Title/Name	Campaign	Member Status	Created Date	Last Updated
Returns and Best Practices in RAR State Reporting	Invitee	Contact	Events	Update				Jun 6, 2018 4:50 AM	Jun 6, 2018 4:51 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

Object Type	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	Jun 6, 2018 5:03 AM	Exported
	Events	Update				Jun 6, 2018 5:23 AM	Jun 6, 2018 5:24 AM	Exported
	Events	Update				Jun 6, 2018 6:47 AM	Jun 6, 2018 6:48 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

Campaign Manage Members

[« Back to Campaign: Events-2018-DMA-Nationwide-SU-Detroit](#)

Add Members Existing Members (1,615)

Hide Filters

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		

[Clear Filters](#)

Go!

Remove	Update Status	Action	Name	Title	Company	Email	Type	Status
<input type="checkbox"/>		Edit Remove	Pr	Purchasing Manager			Lead	Sent
<input type="checkbox"/>		Edit Remove	Jo	Director, Tax Accou...			Lead	Sent
<input type="checkbox"/>		Edit Remove	K	Tax Analyst/Accoun...			Contact	Sent
<input type="checkbox"/>		Edit Remove	K	Tax Analyst/Accoun...			Contact	Sent
<input type="checkbox"/>		Edit Remove	M	Controller			Contact	Sent
<input type="checkbox"/>		Edit Remove	Co	Controller			Contact	Sent

Don't Stop Here!

- CrowdCompass (Awesome Event App!)
- Concur
- Passkey
- GDS
- WebEx
- And More!!!

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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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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

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Nationwide Sales/Use Tax and Texas Property Tax Update

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- Successful audit strategies and tactics
- Trends in tax technology for transaction taxes
- Exemption certificate guidelines
- Texas Property Tax Update

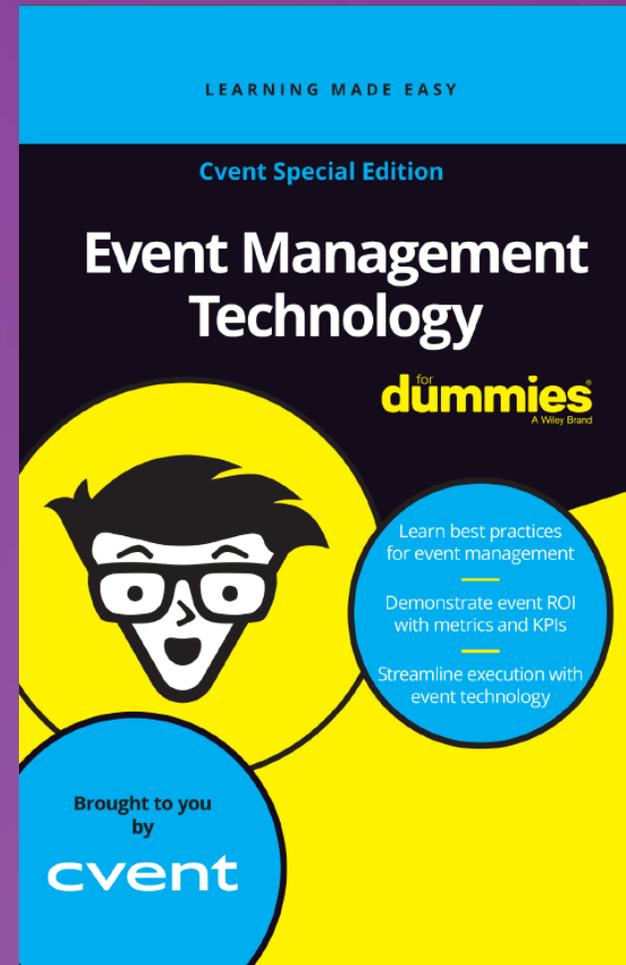
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[Success Groups](#)

[Event Management for Dummies](#)



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Thank You

Lori Wildman | DMA – DuCharme, McMillen & Associates

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