

A photograph of three people (two men and one woman) sitting at a long wooden desk in a bright, modern office. They are all looking at their laptops. The woman on the left has long blonde hair and is smiling. The man in the middle is looking at his laptop. The man on the right is wearing glasses and is smiling. The background shows large windows with a view of a city skyline. A blue diagonal overlay covers the bottom half of the image.

# Cvent Event Management Certification

Prep Guide

# CVENT EVENT MANAGEMENT CERTIFICATION

## A Certified Cvent Event Management Certificate holder should be able to:

- Create and manage an event using Cvent Event Management software.
- Be familiar with features included in a Standard Cvent Professional license.
- Translate event goals and requirements into creating and managing an event in Cvent.
- Effectively use Cvent features and resources to maximize event potential.

## Requirements – All Event Management Certificate candidates should:

- Be users of an active Cvent Account.
- Be familiar with creating, managing, and promoting events using Cvent solutions.
- Review the recommended training, materials, and activities.

## The Exam

The exam will consist of multiple-choice questions which are designed to test your knowledge of Cvent features and your ability to apply them to related scenarios.

## Preparation

To successfully achieve your certification, we recommend personal experience using Cvent's Event Management Software and self-study of the exam objectives listed in this guide.

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# OBJECTIVES & RESOURCES

**A Certified Cvent Event Management Certificate holder should be able to:**

1. Navigate the Cvent Platform
2. Create an Event
3. Configure Event Details
4. Configure Pricing & Fees
5. Utilize the Site Designer to Design the Event Website
6. Utilize the Site Designer to Configure the Registration Process
7. Promote an Event
8. Use Cvent Emails Effectively
9. Manage Invitee Information
10. Use Reports Effectively
11. Use Onsite Features
12. Implement Best Practices

## **Recommended Resources:**

Search the Support Center for the training and articles listed in this guide; each resource is only listed once but may also be helpful when studying other sections.

## 1. Navigate the Cvent Platform

- Navigate the Cvent application and describe the key functions of Admin, Contacts, Events, Suppliers, and Community.
- Navigate the sections of an event and describe the key functions of the Overview, Event Details, Website & Registration, Promotion & Communication, Invitee Management, and Reporting sections.
- Describe the benefits of using Cvent to manage an event.
- Locate the Community and determine how it can be used.

### Recommended Resources:

[Event Creation Training \(Webinar, Video\)](#)

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## 2. Create an Event

- Use best practices to complete the Event Creation Wizard.
- Given a scenario, determine who registration should be open to (Public, Private, Invite-Only).
- Define the purpose of Event Capacity and a Registration Deadline.
- Given a scenario, determine which Event Features should be selected.
- Describe the difference between each of the Event Statuses and the actions available in each.
- Compare the Event Preview and Perform Test actions.

### Recommended Resources:

[Creating a Flex Event \(Community Article\)](#)

[Reopening Registration \(Community Article\)](#)

[Understanding Event Statuses \(Community Article\)](#)

[Moving to Test Mode \(Community Article\)](#)

[Using Testing Scenarios \(Community Article\)](#)

### 3. Configure Event Details

- Define the following: Registration Type, Admission Item, Session, and Optional Item.
- Describe use cases for adding Staff and Speakers.
- Given a scenario, determine whether multiple Admission Items should be used.
- Compare Optional Sessions, Included Sessions, and Optional Items.
- Given a scenario, determine how to configure Session Groups, Categories, and Tracks.
- Identify ways in which an item can become closed for registration.

#### Recommended Resources:

[Adding Registration Types \(Community Article\)](#)

[Creating Admission Items \(Community Article\)](#)

[The Complete Guide to Sessions \(Community Article\)](#)

[Adding Speakers to Your Event \(Community Article\)](#)

[Creating Session Groups \(Community Article\)](#)

[Adding Session Categories \(Community Article\)](#)

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### 4. Configure Pricing & Fees

- Identify items for which a fee can be charged.
- Given a scenario, determine whether multiple fees should be configured for the same item.
- Explain how using early bird discounts and refund policies can save you time.
- Describe use cases for Discount Codes, Volume Discounts, Service Fees, and Taxes.

#### Recommended Resources:

[Advanced Registration Features \(Webinar, Video\)](#)

[Adding Fees \(Community Article\)](#)

[Setting Up a Refund Policy \(Community Article\)](#)

[Working with Discounts \(Community Article\)](#)

[Adding Taxes \(Community Article\)](#)

## 5. Utilize the Site Designer to Design the Event Website

- Understand how to use the Site Designer to add Widgets and Sections to your Website Pages.
- Navigate the Site Designer to create, edit, delete, and reorder pages; Preview, Save and Publish; Validate and view website Version History.
- Describe the hierarchy of the canvas, sections, and widgets in the Site Designer.

### Recommended Resources:

[New Standard Event Management \(Flex\) Training \(Webinar, Video\)](#)

[Welcome to Flex \(Community Article\)](#)

[Using the Site Designer \(Community Article\)](#)

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## 6. Utilize the Site Designer to Configure the Registration Process

- Understand how to use the Site Designer to add widgets on your Registration Pages.
- Given a scenario, determine when it is appropriate to create multiple Registration Paths.
- Identify where to update settings for a Widget, Sections, and Registration Paths.
- Describe how to set up Registration Approval.
- Create and manage Registration Types.

### Recommended Resources:

[Welcome to Flex \(Community Article\)](#)

[Adding Registration Paths \(Community Article\)](#)

[The Complete Guide to Registration Types \(Community Article\)](#)

## 7. Promote an Event

- Determine when to use Weblinks for an Event.
- Describe the purpose of Reference IDs.
- Identify the Social Media features that can be used to promote the event.

### Recommended Resources:

[Event Promotion & Communication \(Webinar, Video\)](#)

[Accessing Your Event Weblinks \(Community Article\)](#)

[Using Reference IDs in Event \(Community Article\)](#)

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## 8. Use Cvent Emails Effectively

- Determine the relationship between Invitation List and the Contacts Tab/Address book.
- Describe the purpose of each of the standard email templates.
- Given a scenario, apply Cvent email best practices.
- Explain how Data Tags can be used to personalize an email and save time.
- Compare Email Send Settings: Audience Type and (Manual, Scheduled, Auto Send).
- Understand the functionality of the new Email Designer.
- Describe the Email Preview and Test Send options.

### Recommended Resources:

[Event Promotion & Communication \(Webinar, Video\)](#)

[Scheduling Event Emails \(Community Article\)](#)

[Manually Sending Event Emails \(Community Article\)](#)

[Using Data Tags in Event \(Community Article\)](#)

[Managing List Members \(Community Article\)](#)

## 9. Manage Invitee Information

- Complete a registration on behalf of an invitee.
- Describe the differences between registering someone on the front-end and registering someone on the backend.
- Describe use cases for Edit Amounts, Send Registration Triggered emails, and No Payments during Planner Registration/Modification.
- Describe when the Modify Registration, Substitute Registration, and Unregister actions would be used.
- Describe how to adjust an order and perform a refund.

### Recommended Resources:

[Invitee Management \(Webinar, Video\)](#)

[Registering for Your Invitees \(Community Article\)](#)

[Modifying Registrations in Flex \(Community Article\)](#)

[Substituting Registrations \(Community Article\)](#)

[Unregistering Registrants \(Community Article\)](#)

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## 10. Use Reports Effectively

- Given a Scenario, determine which report template will be the best to gather the information required.
- Compare New, Custom, and Standard Reports.
- Describe the purpose of Summary Views.

### Recommended Resources:

[Which report should I run? \(Community Article\)](#)

[Running New Event Reports \(Community Article\)](#)

[Using Summary Views \(Community Article\)](#)

## 11. Use Onsite Features

- Configure and print name badges.
- Describe how SocialWall and CrowdCompass can engage event attendees.
- Determine how OnArrival can be used to track participation.
- Given a scenario, determine how to enhance an attendee's onsite experience.

### Recommended Resources:

[Creating Name Badges \(Community Article\)](#)

[Meet Our OnArrival Check-In App \(Community Article\)](#)

[What's New in CrowdCompass \(Community Article\)](#)

[Managing Smart Gallery \(Community Article\)](#)

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## 12. Implement Best Practices

- Configure Planner Alerts.
- Use Contact and Session Imports.
- Describe how the Event Planning Steps can be used while setting up an event.

### Recommended Resources:

[Adding Planner Alerts \(Community Article\)](#)

[Importing Event Contacts \(Community Article\)](#)

[Importing Sessions \(Community Article\)](#)

# STUDY GUIDE



Not sure where to start? Use these tips to begin studying!

## Review the Recommended Training

Becoming familiar with the materials in this guide will set you up for success. There are live training classes, videos, guides, and articles full of information. Set some time aside to look over the highlighted resources and make sure you are up-to-date.

## Get Hands-On!

We encourage you to try things out. As long as the administrators of your account agree, you are free to create a test event to use while you practice for your exam – just don't activate it. You can delete the event later.

## Ask Yourself

Read over each objective like it's a question on the exam and ask yourself if you know the answer. You may even want to take notes related to each item.

For example, to determine if you are prepared for the objective...

*“Describe the purpose of each of the standard email templates.”*

...you may want to ask yourself:

*“What are the standard email templates and what is the purpose of each?”*

If you aren't sure, refer to the recommended resources in that section.

## Practice with Sample Questions

The sample questions on the following pages are designed to be similar to questions you will see on the exam, helping you become familiar with how the questions will appear.

These questions are intended only to serve as an example and are not a comprehensive review of all possible material—but reviewing them can help you prepare!

# SAMPLE QUESTIONS

The questions below are designed to be similar to questions you will see on the exam, helping you become familiar with how the questions will appear. These questions are intended only to serve as an example and are not a comprehensive review of all possible material.

**1. In this area of your Cvent account, you control the overall settings and store resources you can use in all of your events:**

- a. Events > Event Details
- b. Admin
- c. Contacts
- d. None of the above

**2. What happens when the Registration Deadline is reached?**

- a. Event registration automatically closes
- b. You will receive a reminder to login to Cvent and manually close the event for public registration
- c. Invitee receive a notification reminding them they haven't responded
- d. Nothing, the Registration Deadline date is a milestone used for internal purposed only

**3. You have a networking lunch on the agenda and there is plenty of space for all invited. You want everyone to attend but you're charging \$10 to cover food and drink. Should the networking lunch be an included or optional session?**

- a. Included Session
- b. Optional Session

**4. True or False: You cannot change the text of headers and instructional text within the Site Designer.**

- a. True
- b. False

**5. After reviewing feedback from last year's event, you noticed that a few people on your team mentioned the following:**

***"There were several people who made changes to their registration, like adding and removing sessions. They kept calling to make sure we received their updates."***

**Which of the following actions should you take to minimize this concern next year?**

- a. Check that the Invitation Reminder email is set to active
- b. Check that the Cancellation Confirmation email is set to active
- c. Check that the Modification Confirmation email is set to active
- d. None of the above

6. The planning committee votes on the following pricing and refund policy for your event:

*The standard price of admission is \$350 for anyone to register for the event. If someone registers by March 15, they will pay half-price. Anyone cancelling by June 20 will receive their money back, except a \$30 cancellation fee. All speakers register for free.*

Which image shows this policy properly configured in Cvent?

- a.
- | Fees  |              |        |        |           |
|---|--------------|--------|--------|-----------|
| The following fees will be charged for this admission item. The default fee will apply to invitees without a registration type. |              |        |        |           |
| Name  | Amount (USD) | Refund | Active | Display ? |
| Registration Fee <span>Default</span> <span>i</span>  | \$350.00     |        | Yes    | Yes       |
| <a href="#">Early Bird Pricing</a><br>If registered by 3/15/2016  | \$175.00     |        | —      | —         |
| Speaker Fee <span>i</span>  | \$0.00       |        | Yes    | Yes       |
- b.
- | Fees  |              |          |        |           |
|---|--------------|----------|--------|-----------|
| The following fees will be charged for this admission item. The default fee will apply to invitees without a registration type. |              |          |        |           |
| Name  | Amount (USD) | Refund   | Active | Display ? |
| Registration Fee <span>Default</span> <span>i</span>  | \$350.00     |          | Yes    | Yes       |
| <a href="#">Early Bird Pricing</a><br>If registered by 3/15/2016  | \$175.00     |          | —      | —         |
| <a href="#">Refund Policy</a><br>If cancelled by 6/20/2016  |              | \$320.00 | —      | —         |
| Speaker Fee <span>i</span>  | \$0.00       |          | Yes    | Yes       |
- c.
- | Fees  |              |          |        |           |
|---|--------------|----------|--------|-----------|
| The following fees will be charged for this admission item. The default fee will apply to invitees without a registration type. |              |          |        |           |
| Name  | Amount (USD) | Refund   | Active | Display ? |
| Registration Fee <span>Default</span> <span>i</span>  | \$350.00     |          | Yes    | Yes       |
| <a href="#">Early Bird Pricing</a><br>If registered by 3/15/2016  | \$175.00     |          | —      | —         |
| <a href="#">Refund Policy</a><br>If cancelled by 6/20/2016  |              | \$320.00 | —      | —         |
- d. Both B and C

7. True or False: The Follow Bar is a way to prompt invitees to share the event through their own social media pages.

- a. True  
b. False

8. Which of the following are ways you can add people to an invitation list:

- I. Add Contacts from Address Book
  - II. Quick Add
  - III. Import Contacts
- a. I only
  - b. I and II
  - c. II and III
  - d. All of the above

9. Which of the following statements are TRUE when registering someone on the back end using Register New from the Invitee Management Menu:

- I. You can change the price of an item using a link on the Submit Payment page.
  - II. Before proceeding, Cvent requires you to fill in the contact information and registration questions that are listed in bold and red.
  - III. You can decide whether an automatic email (like the registration confirmation email) will be sent.
- a. I only
  - b. I and II
  - c. I and III
  - d. All of the above

10. Which of the following standard reports would be the best fit for the following scenario:

*You asked people which meal option they prefer and need to send the numbers to your caterer.*

- a. Survey Question Summary
- b. Registrant Ad Hoc
- c. Registration Summary by Registration Item
- d. Registrants

# SAMPLE QUESTION ANSWERS

## 1. B – Admin

In the Admin section of your account, you can add users, manage your media library, and designate settings that will apply across your entire account. The Events > Event Details section is where you will manage the logistics of a particular event. In Contacts, you'll find contact information and their event-related history.

**Related Objective:** Navigate the Cvent Application and describe the key functions of Admin, Contacts, Event, Suppliers, and Support Center.

## 2. A – Event registration automatically closes

The Registration Deadline is the last day and time that your event is open for registration. When this date passes, your event will be closed for registration. While you may configure a planner alert to remind yourself that this date is coming up, the system will automatically make this change.

**Related Objective:** Define the purpose of the Event Capacity and the Registration Deadline.

## 3. B – Optional Session

You should configure an Optional Session when there will be an additional fee to attend.

**Related Objective:** Compare Optional Sessions, Included Sessions, and Optional Items.

## 4. B – False

Within the Site Designer, you can add headers and custom text by adding text widgets to any of your pages. Additionally, you can add instructional text within the settings of particular widgets.

**Related Objective:** Using the Site Designer, customize a website page with a text widget.

## 5. C – Check that the Modification Confirmation Email is set to active

This email can be sent automatically to people who make updates to their registration. By making sure the email is active, you ensure that it will be triggered so people know that you received their changes.

**Related Objective:** Describe the purpose of each of the standard email templates.

## 6. B – Image B

This is the only image which shows the correct configuration of the Early Bird Pricing, Refund Policy, and Speaker Fee.

**Related Objective:** Configure the fees, early-bird pricing and refunds.

## 7. B – False

The Follow Bar is A way for you to provide a list of your organization’s social media sites, so invitees can go there to “like”, “follow” or “subscribe”. In the Follow Bar, you can add links to your social media profiles so your invitees can locate them right on your website. It can help your organization gain followers or subscribers. The Follow Bar is different from the Share Bar and Share Prompt, which encourage invitees to create posts about your event.

**Related Objective:** Identify the Social Media features that can be used to promote your event.

## 8. D – All of the above

An invitation list is a set of contacts and the emails that will be sent to them before, during, and after an event. To add people to an invitation list you can select contacts already in your address book, quick add them one-off or import contacts in bulk.

**Related Objective:** Understand scenarios where multiple invitation lists may be used.

## 9. C – I and III

When registering someone on the back end, you can use Edit Amounts to change the price of an item for the person you are registering. You are not required to fill in contact and registration questions that are required for invitees. You can also use the check box near the bottom to choose whether any automatic emails will be sent – like the registration confirmation.

**Related Objective:** Describe the differences between registering someone on the front-end and registering someone on the backend.

## 10. A – Survey Question Summary

In this standard report, you can review the breakdown for the selected survey question, and quickly pull a Count or Percentage. While Registration Questions can be viewed in other reports, the quickest way to pull the numbers would be using this one.

**Related Objective:** Given a Scenario, determine which report template will be the best to gather the information required.