

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



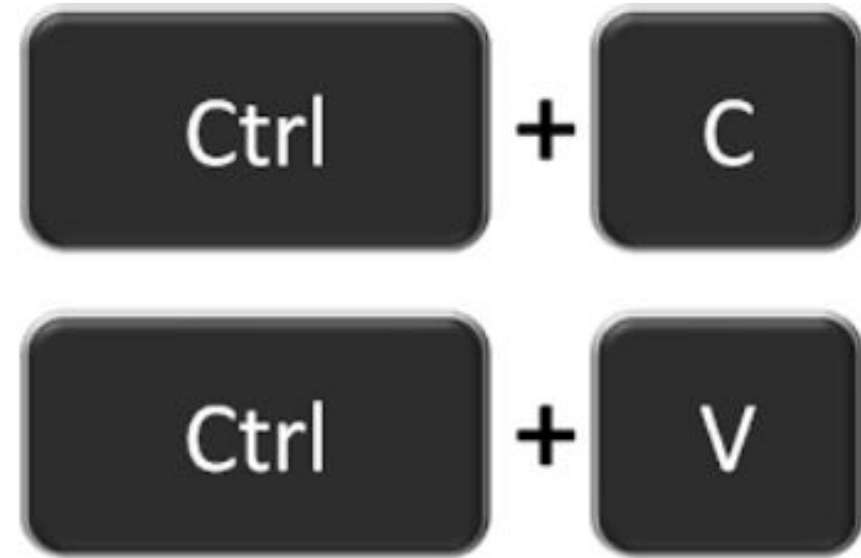
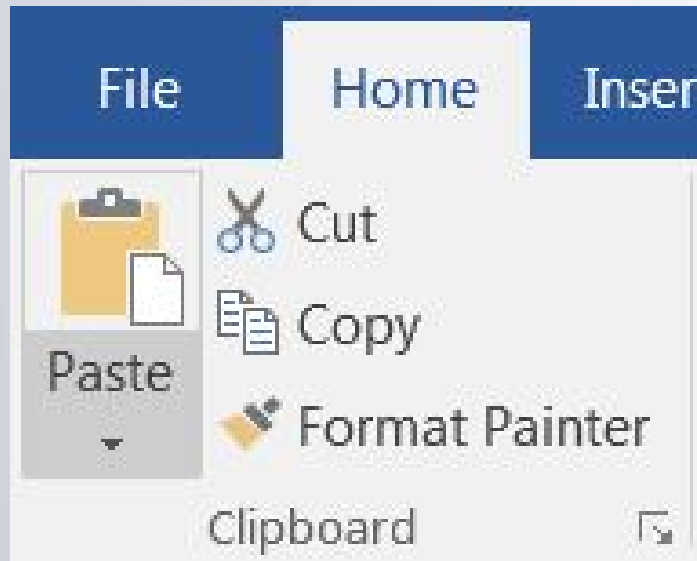
About

- 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

+

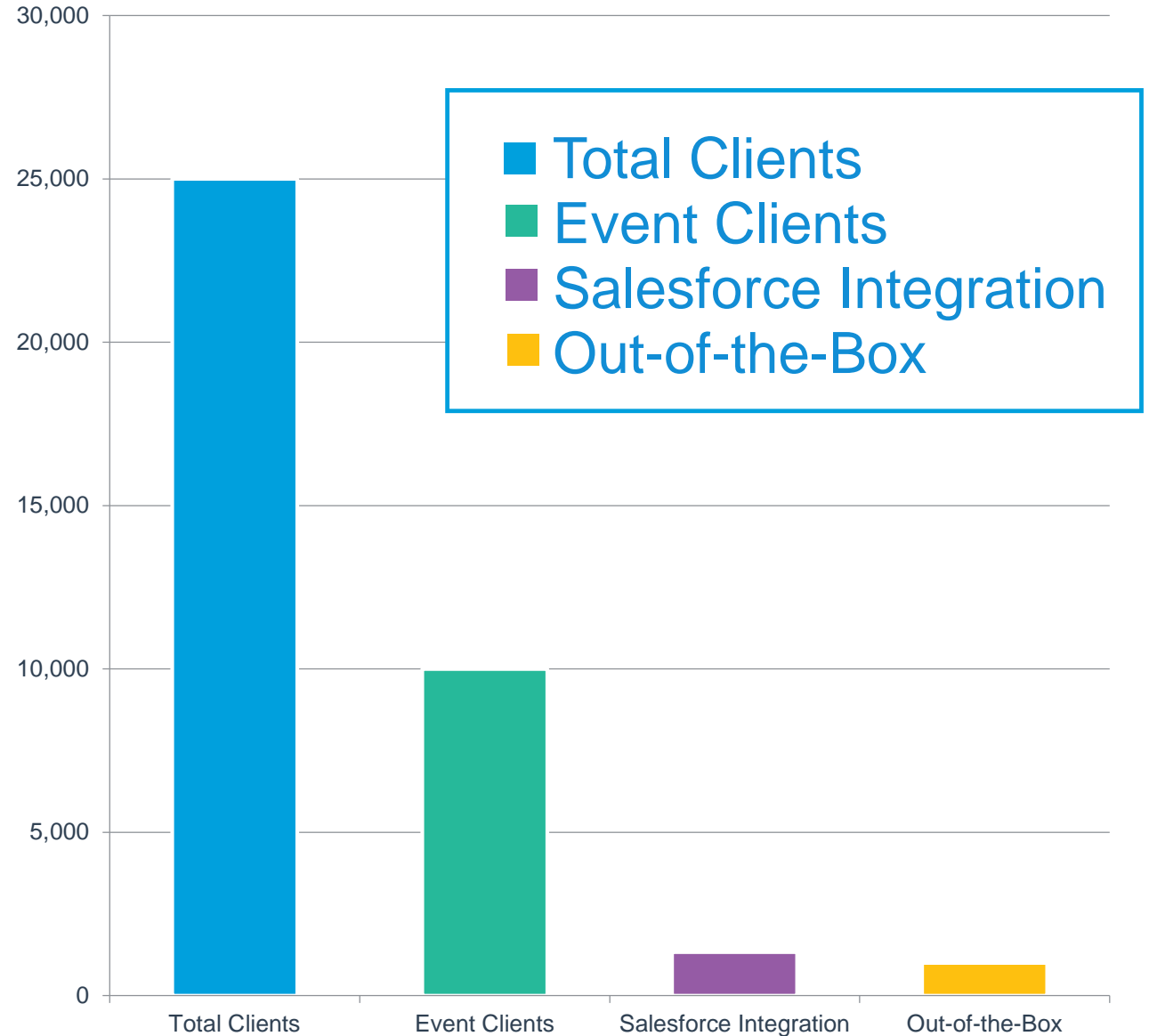
salesforce

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?

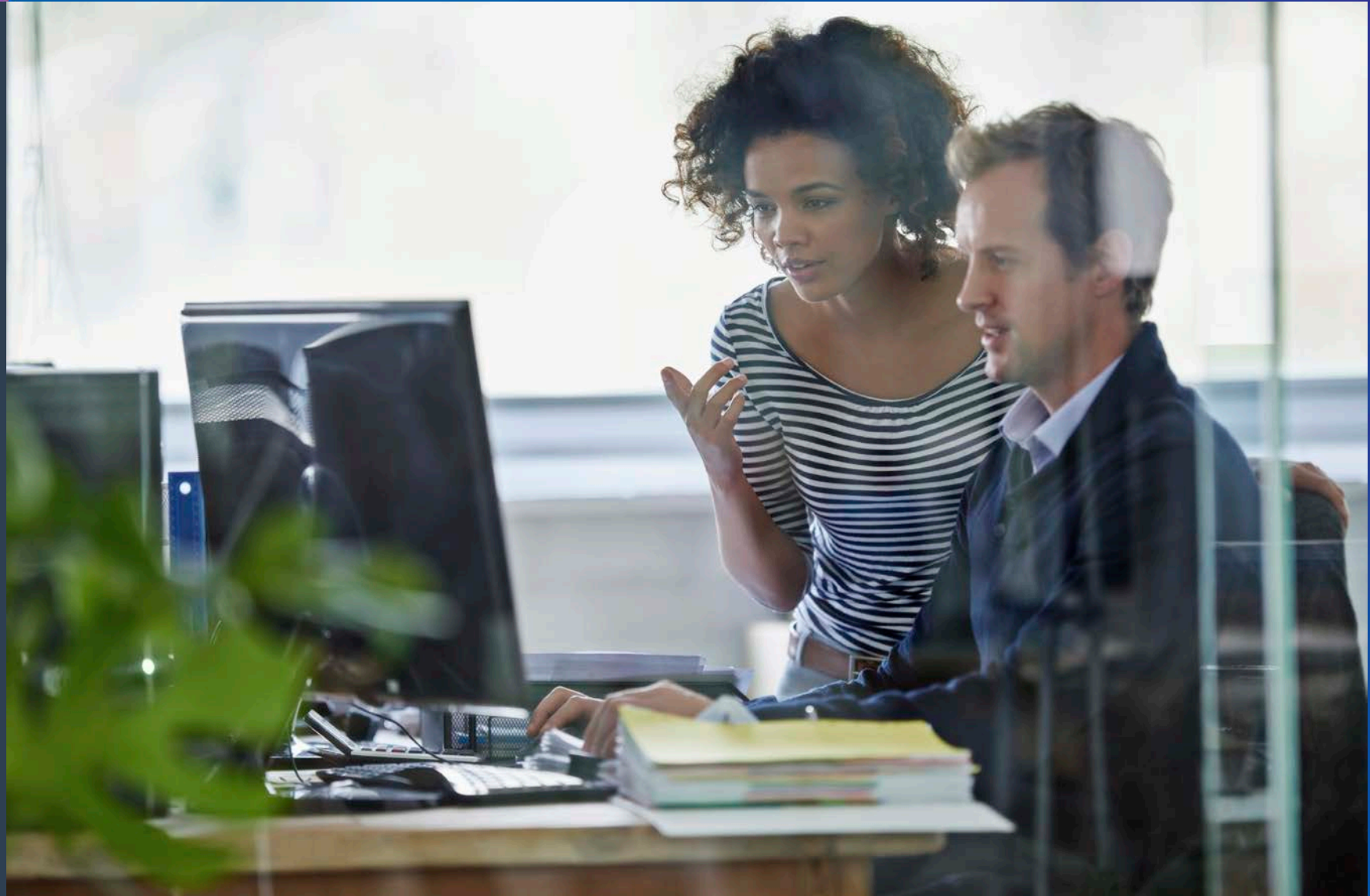


YES

- 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 user interface with the 'Contacts' tab selected. The left sidebar contains navigation links for 'Recent Items', 'Custom Links', 'Messages and Alerts', and a 'Recycle Bin'. The main content area shows the profile of 'Lori Wildman', including a 'Show Feed' button and a list of related items like 'Open Activities', 'Activity History', and 'Contact History'. Below this, the 'Contact Detail' section provides a comprehensive view of the contact's information, organized into a table-like structure with fields for personal and professional details, and a bottom section for communication preferences.

Contact Detail		Phone	
Name	Lori Wildman	Primary Extension	2528
Title	Senior Marketing Manager	Mobile	
Account Name	DuCharme, McMillen & Associates, Inc.	Other Phone	
Email	lwildman@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 displays the Salesforce interface for a Lead record. The top navigation bar includes links for Home, Leads (active), Accounts, Contacts, Opportunities, Contracts, Campaigns, Reports, Dashboards, and Forecasts. A left sidebar contains sections for Recent Items, Custom Links (Salesforce Trailhead), and Messages and Alerts. The main content area shows the Lead Detail for a user named Steve, with fields for Name, Title, Company, and Lead Owner. Action buttons (Edit, Delete, Convert, Clone, Find Duplicates, Clean) are visible. The Contact Information section includes fields for Email, Email Opt Out, Email Opt In, Phone, Do Not Call, Mobile, Fax, and Fax Opt Out. The Lead Status is set to Open, and the Property Type is NLH.

Home Leads Accounts Contacts Opportunities Contracts Campaigns Reports Dashboards Forecasts +

Recent Items

- St
- Jol
- Loj
- Ma
- Je
- C
- C
- Te
- 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

Title Senior Director, Global Tax

Company

Lead Owner

Lead Status Open

Property Type NLH

▼ Contact Information

Email S

Email Opt Out ☐

Email Opt In ☐

Phone

Do Not Call ☐

Mobile

Fax

Fax Opt Out ☐

Salesforce Definitions

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

The screenshot shows the Salesforce interface for a Campaign. The top navigation bar includes links for Contacts, Opportunities, Contracts, Campaigns (highlighted), Reports, Dashboards, and Forecasts. The main header displays the Campaign name 'Events-2018-DMA-Nationwide-SU-Santa-Clara' with a 'Show Feed' button and a 'Back to List' link. Below the header, there are links for 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 the Campaign Owner, Campaign Name, Active status, Type (Seminar / Conference), Parent Campaign, and Description. The 'Planning' section includes a table with 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 includes a table with 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

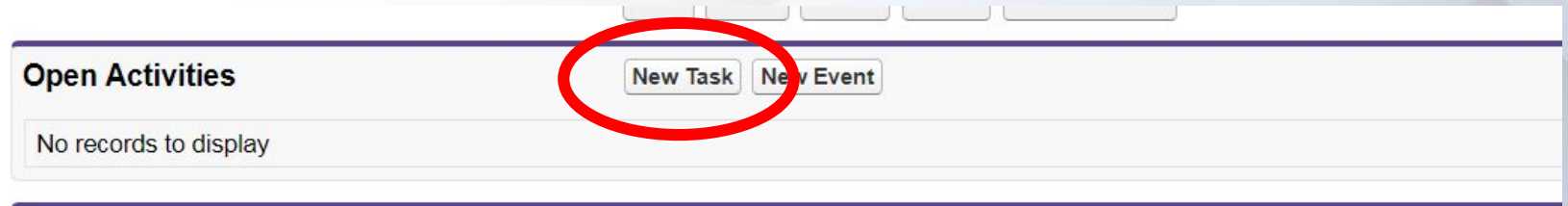
Salesforce Definitions

- 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 titled "Buy more generators". The navigation bar at the top includes tabs for Leads, Accounts, Contacts, Opportunities (selected), Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, and Dashboards. Below the navigation bar, the page title "Opportunity Buy more generators" is displayed, along with links for "Customize Page", "Edit Layout", "Printable View", and "Help for this Page". A "Show Feed" button and a "Click to add topics" link are also present. A "Back to List: Custom Settings" link is located below the feed. The main content area is titled "Opportunity Detail" and includes buttons for "Edit", "Delete", and "Clone". The record details are organized into two columns. The left column contains fields for Opportunity Owner (Chris Waters), Private status, Opportunity Name (Buy more generators), Account Name (Mikes Bikes), Type (Existing Customer - Upgrade), Lead Source, Order Number, Current Generator(s), Tracking Number, Created By (Chris Waters, 3/23/2015 1:28 PM), Description, and Custom Links (Delivery Status). The right column contains fields for Amount (\$2,500.00), Expected Revenue (\$1,250.00), Close Date (3/27/2015), Next Step, Stage (Value Proposition), Probability (%) (50%), Primary Campaign Source, Main Competitor(s), and Delivery/Installation Status.

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, My Profile, Help & Support, Cvent Community, Log Out) is on the right. Below the logo is a 'Solutions:' dropdown menu with a 'Go to...' button. A navigation bar contains links for Account, Events, Meetings Management, Supplier Network, Users, Libraries, Budget, Integrations, and Reporting. The 'Integrations' link is circled in red. Below the navigation bar, a dropdown menu is open, showing 'Merchant Accounts', 'SOAP API Usage', and 'Salesforce Integration', which is also circled in red. Below this, a breadcrumb trail reads: 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 says '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

Events

Surveys

Default

Salesforce Server

Production

Production

Salesforce Integration

Events

EditRetrieve Salesforce FieldsValidateClose

General SettingsRecord Matching CriteriaField MappingsIntegration PointsCampaign 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

Events

EditRetrieve Salesforce Fields

General SettingsRecord Matching CriteriaField MappingsIntegration PointsCampaign 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

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

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

Salesforce Integration

Events

SaveCancelSpelling

General SettingsRecord Matching CriteriaField MappingsIntegration PointsCampaign 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

SaveCancel

General SettingsRecord Matching CriteriaField MappingsIntegration PointsCampaign 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

EditClose

General InformationSingle Match SettingsMultiple Match SettingsNo 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

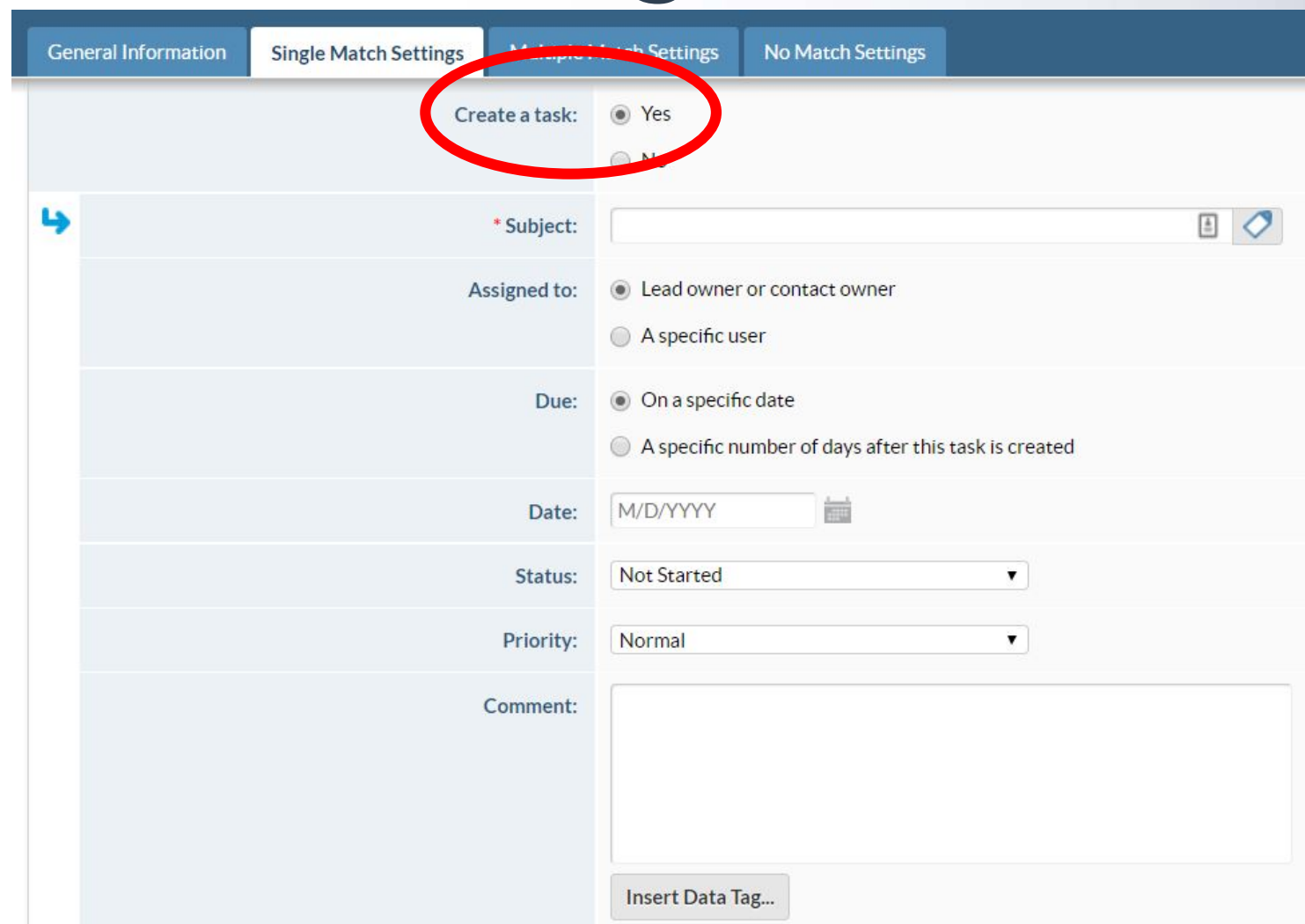
Additional Actions

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



The screenshot shows a web interface for Salesforce integration settings. At the top, there are four tabs: 'General Information', 'Single Match Settings', 'Multiple Match Settings', and 'No Match Settings'. The 'Single Match Settings' tab is active. Below the tabs, the 'Create a task:' section is highlighted with a red circle. It contains two radio buttons: 'Yes' (selected) and 'No'. Below this, there are several form fields: '* Subject:' (text input), 'Assigned to:' (radio buttons for 'Lead owner or contact owner' and 'A specific user'), 'Due:' (radio buttons for 'On a specific date' and 'A specific number of days after this task is created'), 'Date:' (text input with a calendar icon), 'Status:' (dropdown menu with 'Not Started' selected), 'Priority:' (dropdown menu with 'Normal' selected), and 'Comment:' (text area). At the bottom right, there is a button labeled 'Insert Data Tag...'.


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: 



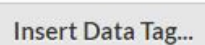
Status: ▼

Priority: ▼

Comment:

Insert Data Tag...

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:	<div><div><input type="radio"/> No action</div><div><input checked="" type="radio"/> Update the matched lead or contact</div><div><input type="radio"/> Create a contact</div><div><input type="radio"/> Create a lead</div></div>
<div><div></div><div>Update the Salesforce record only if the Cvent record is more up-to-date:</div></div>	<div><div><input checked="" type="radio"/> Yes</div><div><input type="radio"/> No</div></div>

Salesforce Integration

The screenshot displays the Cvent website interface. At the top left is the Cvent logo. To the right, there are links for 'Iwildman', 'My Profile', and 'Help & Support'. Below these is a 'Solutions:' section with a blue 'Go to...' button. Further right are buttons for 'Contacts', 'Admin', and 'Dashboards'. A horizontal navigation bar contains links for 'Account', 'Events', 'Meetings Management', 'Supplier Network', 'Users', 'Libraries', 'Budget', 'Integrations' (which is highlighted with a blue underline), and 'Reporting'. Below this bar is a dark breadcrumb trail: 'Admin > Integrations > Integrations > Salesforce Integration > Salesforce Integration > Invitee Attends the Event'. A red oval is drawn around the first four items of this breadcrumb trail: 'Admin', 'Integrations', 'Integrations', and 'Salesforce Integration'.

cvent

Solutions:
Go to...

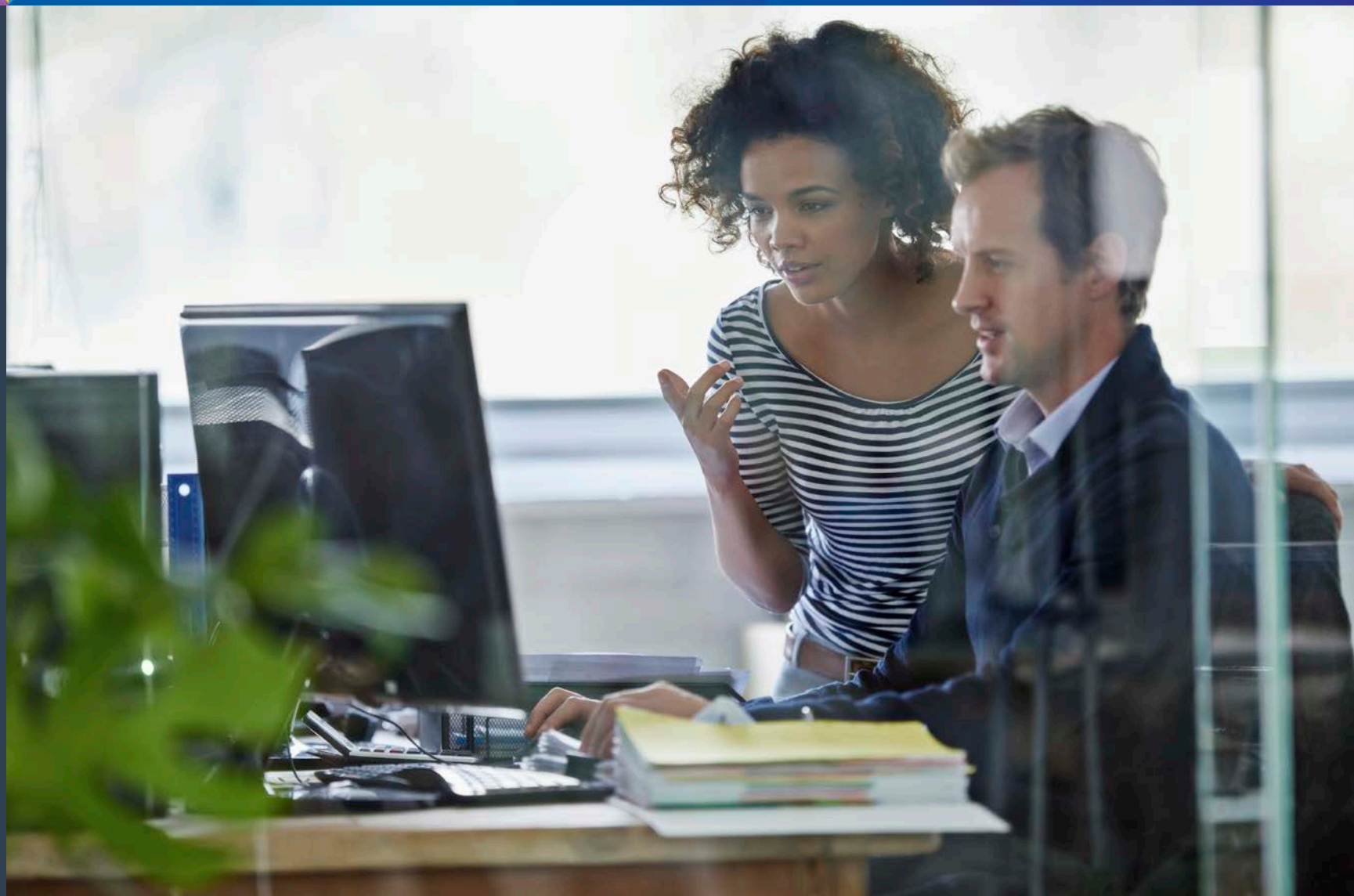
Iwildman My Profile Help & Support

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

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

Connecting a Campaign

Events

SaveCancelSpelling

General SettingsRecord Matching CriteriaField MappingsIntegration PointsCampaign 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 +

Recent Items

[Event 2018 Client](#)

[Event 2017 Client](#)

[Event 2018 Client](#)

[Event 2018 Client](#)

[Event 2018](#)

[Steve](#)


[John](#)

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

[New Campaign](#)

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

SaveSave & NewCancel

Campaign Information

Campaign Owner

StatusIn Progress ▾

Campaign NameEvents-2018-DMA-Nationw

Active☒

TypeSeminar / Conference ▾

Parent Campaign

Description

Planning

Start Date1/31/2018 [7/2/2018]

End Date10/5/2018 [7/2/2018]

Expected Revenue in Campaign

Budgeted Cost in Campaign

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, the Cvent logo is on the left, and a navigation bar on the right includes links for 'Iwildman', 'My Profile', 'Help & Support', 'Cvent Community', and 'Log Out'. Below this, a 'Solutions:' dropdown menu is set to 'Events'. A secondary navigation bar contains tabs for 'Cross Events', 'Overview' (selected), 'Event Details', 'Website & Registration', 'Promotion & Communication', 'Invitee Management', and 'Reporting'. The main content area is divided into five columns: 'General', 'Planning', 'Agenda Items', 'Pricing', and 'Travel'. The 'General' column lists 'Event Information', 'Event Configuration', 'Registration Types', 'Salesforce Integration' (highlighted with a red circle), and 'Event Status'. The 'Planning' column lists 'Budget', 'Staff', 'Tasks', 'Speakers', 'Documents', and '*Session Locations'. The 'Agenda Items' column lists '*Admission Items', '*Sessions', '*Session Groups', '*Tracks', and '*Optional Items'. The 'Pricing' column lists '*Fees', '*Discounts', and '*Service Fees'. The 'Travel' column lists 'Hotel Accommodations', '*Air Travel', and '*Car Rental'. A footer note states: '*Not enabled for this event. To enable these features, please go to [Event Configuration](#).'

cvent

Solutions: Events

Iwildman My Profile Help & Support Cvent Community Log Out

Contacts Admin Dashboards Recent Items

Cross Events Overview Event Details Website & Registration Promotion & Communication Invitee Management Reporting

General

- Event Information
- Event Configuration
- Registration Types
- Salesforce Integration**
- Event Status

Planning

- Budget
- Staff
- Tasks
- Speakers
- Documents
- *Session Locations

Agenda Items

- *Admission Items
- *Sessions
- *Session Groups
- *Tracks
- *Optional Items

Pricing

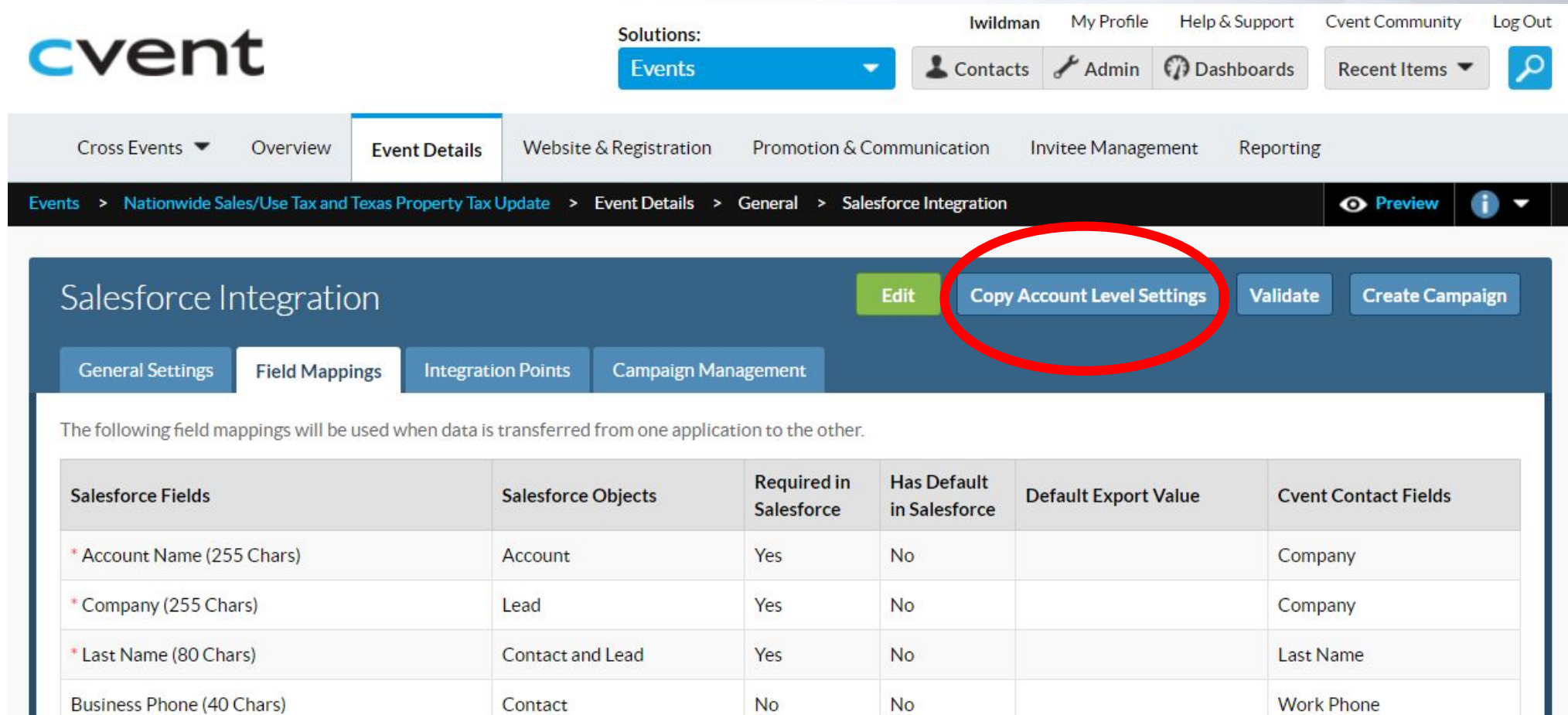
- *Fees
- *Discounts
- *Service Fees

Travel

- Hotel Accommodations
- *Air Travel
- *Car Rental

*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, the Cvent logo is on the left, and navigation links for 'Solutions: Events', 'Iwildman', 'My Profile', 'Help & Support', 'Cvent Community', and 'Log Out' are on the right. Below this is a secondary navigation bar with 'Cross Events', 'Overview', 'Event Details' (selected), 'Website & Registration', 'Promotion & Communication', 'Invitee Management', and 'Reporting'. A breadcrumb trail shows the path: 'Events > Nationwide Sales/Use Tax and Texas Property Tax Update > Event Details > General > Salesforce Integration'. The main content area is titled 'Salesforce Integration' and contains buttons for 'Edit', 'Copy Account Level Settings' (circled in red), 'Validate', and 'Create Campaign'. Below these are tabs for '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.' Below this is a table with 6 columns: 'Salesforce Fields', 'Salesforce Objects', 'Required in Salesforce', 'Has Default in Salesforce', 'Default Export Value', and 'Cvent Contact Fields'.

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









































Active	Salesforce Campaign	M
Yes	Events-2018-DMA-Nation  	S
Yes	Events-2018-DMA-Nation  	

SaveCancel

Integration PointsCampaign Management

Choose campaign to update, which status to assign to new and updated campaign records, and which campaign records to update.

Apply to All...

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	Status	Update
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

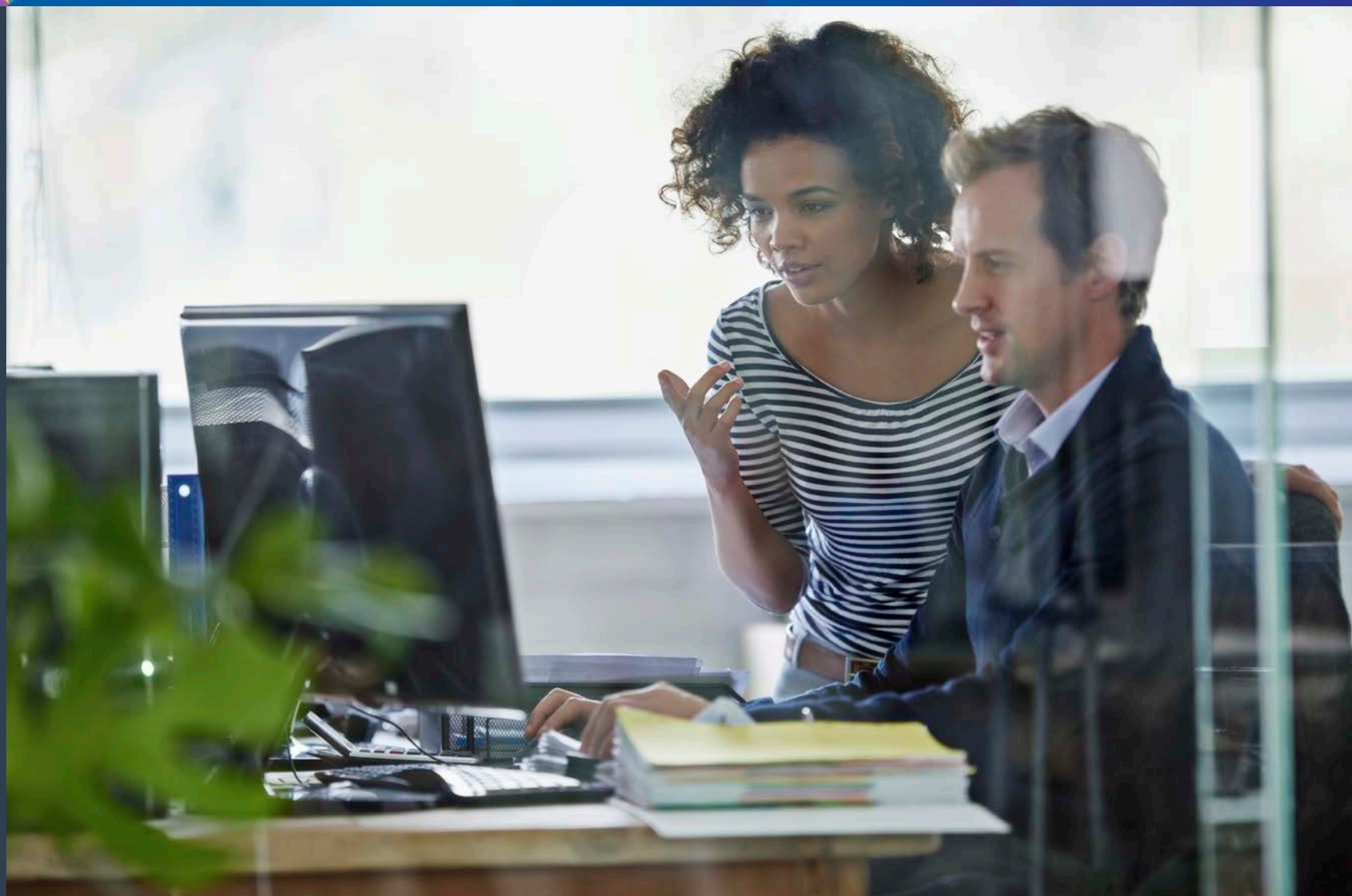
Member Status

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

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

Address Book

Create Contact Import Find Duplicates Clear Duplicates Actions

Contacts Contact Groups

Contact Group: All Contact Groups

Contact Search: Advanced Search

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 a web browser window with the URL `https://dma.my.salesforce.com/7011C000000r5Vn` highlighted. Below the browser, the DMA Marketing Dashboard is visible, featuring a search bar and navigation tabs for Home, Leads, and Accounts. The main content area is titled 'Import Contacts' and displays 'Step 1: Locate and Select the Salesforce Records'. In this step, the 'Configuration' is set to 'Events', and the 'Salesforce Object' is set to 'Campaign'. A filter is applied to 'Campaign ID' using the 'equals' operator, with the value '7011C000000r5Vn' entered in the filter field. The interface includes a '+ Add Filter' button, 'And'/'Or' logic selectors, and 'Cancel'/'Search' buttons at the bottom right.

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:

Events

Salesforce Object:

Contact

Lead

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

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-2013-DMA-Nationwide-SU-Irving		Seminar / Conference	In Progress	4/19/2018 12:00:00 AM	3/1/2019 12:00:00 AM

Cancel

Search

Search for Campaign Members

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:

☐ None
☒ 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, the cvent logo is on the left, and navigation links for 'Solutions: Go to...', 'My Profile', 'Help & Support', 'Contacts', 'Admin', and 'Dashboards' are on the right. A secondary navigation bar includes 'Account', 'Events', 'Meetings Management', 'Supplier Network', 'Users', 'Libraries', 'Budget', 'Integrations', and 'Reporting'. The 'Reporting' link is highlighted with a red circle. Below this, a breadcrumb trail shows 'Admin > Reporting > View > Reporting'. The main heading is 'Reporting'. Below the heading, there are filters for 'Sort by: Name' and 'Category: All'. A search icon is also present. The main content area lists several report categories under 'Account Integration Reports': 'API Call History', 'Eloqua Record History', 'Marketo REST Record History', and 'Salesforce Record History'. The 'Salesforce Record History' link is highlighted with a red circle.

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--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Clear Filters](#)

Go!

Remove		Update Status ▼					
<input type="checkbox"/>	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 with...

[▶ 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?...

Filter Events By

Keyword

State

Date Range



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UPCOMING EVENTS

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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

Information

Event Details

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Register

Nationwide Sales/Use Tax and Texas Property Tax Update

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.

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

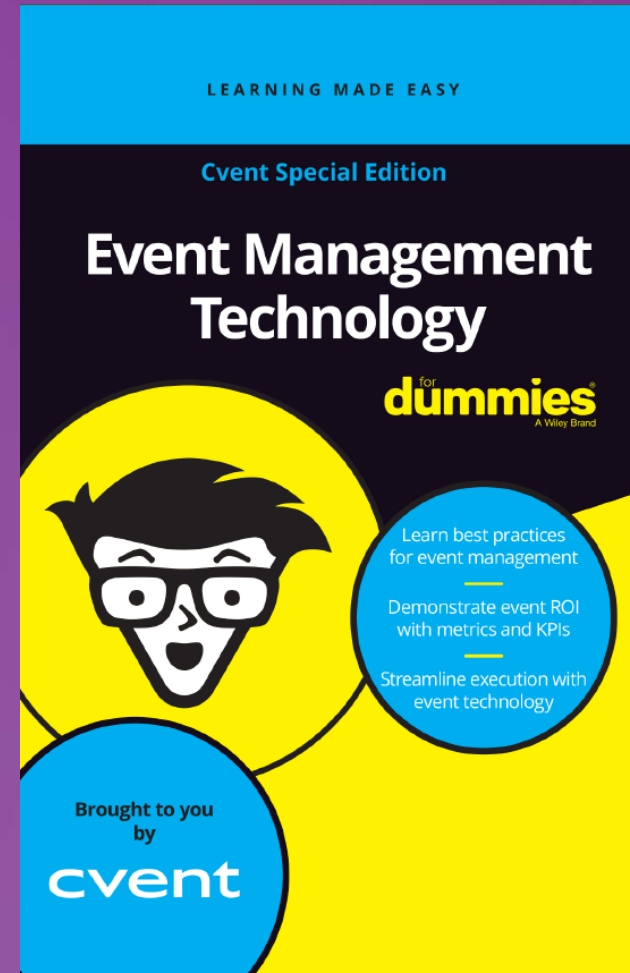
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Thank You

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