Cvent
Event Management
Advanced

Prep Guide

CVENT EVENT MANAGEMENT ADVANCED CERTIFICATION

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

- Effectively use Cvent best practices to manage information across multiple events in Cvent.

- Be familiar with advanced applications of key professional and enterprise features.

- Possess specialty knowledge about effectively using self-selected Enterprise features.

Requirements – All Event Management Advanced Certificate candidates should:

- Be familiar with creating and managing events using Cvent solutions (including the advanced enterprise features in the exam).

- 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 Event Management Software and self-study of the exam objectives listed in this guide. In addition to this preparation guide, join a virtual certification study group for an in-depth review and dedicated time to get your questions answered by a Cvent expert.

Contents

OBJECTIVES & RESOURCES

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

1. Navigate the Cvent Platform

2. Create an Event Budget

3. Create Event Tasks

4. Configure Dynamic Website & Registration Pages Using the Site Designer

5. Create & Manage Event Documents

6. Manage Speakers

7. Manage Sessions Effectively

8. Use Discounts, Taxes & Service Fees Effectively

9. Configure Travel Accommodations

10. Use Onsite Features

11. Configure Advanced Rules

12. Configure Custom Data Tags

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 Support Center.

    - 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 Support Center and determine how it can be used.

    Recommended Resources:
    Event Creation (Webinar)

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2. **Create an Event Budget**

    - Describe how to create a Budget in Event Details.

    - Given a scenario, determine if a Budget can be created in different currencies.

    - Identify whether the Budget can track both income and expenditures.

    Recommended Resources:
    Budgeting 101 (Community Article)

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3. **Create an Event Task**

    - Describe how to create Tasks in an event.

    - Identify which types of notifications Task assignments trigger.

    Recommended Resources:
    Managing Tasks (Community Article)

4. Configure Dynamic Website & Registration Pages Using the Site Designer

- 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.

- Given a scenario, determine when it is appropriate to create multiple Registration Paths.

- Identify where to update settings for a Widgets, Sections, and Registration Paths.

- Describe how to set up Registration Approval.

- Create and manage Registration Types.

Recommended Resources:
Transitioning to Flex Events (Webinar)
Welcome to Flex (Community Article)
Using the Site Designer (Community Article)
Adding Registration Paths (Community Article)
The Complete Guide to Registration Paths (Community Article)

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5. Create & Manage Event Documents

- Describe how to upload a Document at both the event and account levels.

- Determine how to designate a Document as internal.

- Describe how to link to a Document.

Recommended Resources:
Uploading Documents (Community Article)
Linking to Documents (Community Article)
How do I attach documents to an email? (Community Article)

6. Manage Speakers

- Describe how to add a Speaker to an event.

- Describe how to add a Speaker in Admin.

- Given a scenario, determine whether a Speaker should be added at the account or event level.

Recommended Resources:
Adding Speakers to Your Event (Community Article)
Adding Speakers to Your Account (Community Article)

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7. Manage Sessions Effectively

- Define the purpose of Session Groups.

- Given a scenario, identify whether Session Groups is an appropriate feature to use.

- Identify the different display options for Session Groups.

Recommended Resources:
The Complete Guide to Sessions (Community Article)
Creating Session Groups (Community Article)

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8. Use Discounts, Taxes, & Service Fees Effectively

- Describe the differences and uses for Volume Discounts and Discount Codes.

- Describe and apply the different discount methods.

- Given a scenario, describe use cases for Services Fees and Taxes.

Recommended Resources:
Creating Discount Codes (Community Article)
Creating Volume Discounts (Community Article)
Adding Service Fees (Community Article)
Adding Taxes (Community Article)

9. Configure Travel Accommodations

- Determine what hotel information displays on the Hotel Widget when imported from the Cvent Supplier Network.

- Given a scenario, determine why a hotel would not be displaying correctly on the Hotel Widget after having been set up in Cvent.

- Determine how to configure rates for Room Types.

- Define, configure, and compare Air Actuals and Air Requests.

Recommended Resources:
Adding Hotels to Your Event (Community Article)
Collecting Hotel Requests in Flex (Community Article)
Adding Rooms (Community Article)
Setting Up Air Requests (Community Article)

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10. Use Onsite Features

- Describe the benefits and use cases of using Kiosk Mode.

- Describe the attendee payment options available in Kiosk Mode.

- Given a scenario, be able to identify how often Cvent and OnArrival sync.

- Determine how an attendee's status effects their visibility in OnArrival.

Recommended Resources:
Meet Our OnArrival Check-In App (Community Article)
Setting up Kiosk Mode in OnArrival (Community Article)
Can I register walk-ins using OnArrival? (Community Article)

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11. Configure Advanced Rules

- Identify use cases for creating Advanced Rules.

- Describe the types of Advanced Rules that can be created.

- Identify the limitations of Advanced Rules.

Recommended Resources:
[Creating Advanced Rules (Community Article)](#)
[Limiting Options Based on Admission Items (Community Article)](#)

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12. Configure Custom Data Tags

- Determine the steps to create a Custom Data Tag.

- Describe the use cases for creating a Custom Data Tag.

- Given a scenario, be able to identify Custom Data Tags as an appropriate solution.

Recommended Resources:
[Using Custom Data Tags (Community Article)](#)
[Using Data Tags in Event (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.

Attend a Virtual Certification Study Group

Join a free virtual certification study group for an in-depth review of the content covered on the exam and dedicated time to get your questions answered by a Cvent expert!

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. When a planner creates Advanced Rules, when does the Warning Message display during registration?
   a.   When the rule is not met during registration
   b.   After the registration is complete
   c.   An email will be sent to the planner informing them the rule has been violated
   d.   It does not display, it is an internal message only

2. True or False: A session can appear in multiple Session Groups
   a.   True
   b.   False

3. A planner has created a marketing session group with five sessions. The speaker for a branding session that is included in the marketing session group has cancelled. You would like to delete the branding session from the marketing session group. Since your event has launched, is it possible to delete the session from the session group?
   a.   Yes, just go into the session group and delete the session
   b.   No, you will need to delete the session group and recreate it without the cancelled session

4. True or False: You have set up a registration for your event and recognize that your registration process is very lengthy. You can shorten your registration process to be a one-page registration.
   a.   True
   b.   False

5. In Session Emails, confirm whether the below actions are possible:

Session Emails	Yes	No
Send an email to someone who did not register for a session		
Send an email when someone unregisters from a session		
Associate multiple sessions to one email		
Send an email when someone is added to a session		

6. A registrant has notified you that they can no longer attend your conference. You cancel their registration with the intent of refunding the registration automatically. However, the refund did not take place. Why might this be?

I.   It's not possible to provide automatic refunds
II.   The refund policy is expired
III.   There is no refund policy set up for this event
   a.   I only
   b.   II only
   c.   III only
   d.   II and III

7. True or False: When you preview your website in the site designer, you can click on links and navigate through pages
   a.   True
   b.   False

8. After reviewing participant reports from a recent event, you noticed several people that you remember seeing at the conference were not marked as having attended. You know that your event staff marked participants off on a check-list at the registration desk. What can you do to correct your participation data in Cvent?
   a.   Re-register the invitees on the backend through Invitee Management
   b.   Import a list of participants into the event through Invitee Management
   c.   Submit a request through the Support Community
   d.   This is not possible

9. Where would you go to select which fields invitees are required to complete to submit an air request?
   a.   Registration Path > Settings
   b.   Air Request Widget > Customize
   c.   Event Details > Air Travel
   d.   Event Details > Event Configuration > Air Travel

10. True or False: You can only create up to 50 test registrations and send up to 50 test emails in Test Mode
   a.   True
   b.   False

SAMPLE QUESTION ANSWERS

1. A – When the rule is not met during registration

Advanced Rules allows you to: require your invitees to select a minimum number of sessions, limit the number of quantity items they can purchase or make them select an earlier check-in/out date or flight. Website & Registration > Advanced Rules is where you can create these rules. When creating the rule, you will be able to enter in a Warning Message that will be displayed when a registrant attempts an action that does not meet the rule requirements.

Related Objective: Configure an Advanced Rule for an event and Preview your event to see how the Warning Message displays.

2. B – False

Session groups are a way to organize multiple optional sessions. Since an invitee can only select one session from a session group, they can be used to prevent scheduling conflicts, limit an invitee's selection or simply shorten the registration process. Because the purpose of Session Groups is to prevent scheduling conflicts, you can only include a session in one session group at a time.

Related Objective: Define the differences between Session Groups and Tracks.

3. B – No, you will need to delete the session group and recreate it without the cancelled session

Once an event is launched, the sessions contained in a Session Group cannot be deleted. They can be closed to registrants, but to remove the session from appearing in the Session Group, you will need to delete the entire session group and recreate it without the cancelled session.

Related Objective: Compare Optional Sessions and Included Sessions.

4. A – True

With the Site Designer, you can now reorder, delete, and create Registration Pages to customize the Registration Process for your event. Additionally, you can choose which Registration Widgets you want to utilize and determine on which Registration Pages they will be visible.

Related Objective: Using the Site Designer, customize the Registration Process for an event. See if certain actions or configurations cause an error message to be displayed when Validating Website.

5. See table below:

Session Emails	Yes	No
Send an email to someone who did not register for a session		X
Send an email when someone unregisters from a session	X	
Associate multiple sessions to one email	X	
Send an email when someone is added to a session	X	

6. D – II and III

A refund policy is required if you would like to automatically refund a registrant when they cancel. This is only possible for registrations that are processed online.

Related Objective: Review ways to refund offline orders and how to manually refund orders when no refund policy is in place.

7. B – False

The Preview button within the Site Designer is used to preview the look and feel of a Website or Registration Page. If you want to preview the functionality of your Website or Registration Process, you will need to use the Preview icon outside of the Site Designer.

Related Objective: Review the differences between completing a registration in Preview mode as opposed to completing a test registration.

8. B – Import a list of participants into the event through Invitee Management

Participation can be marked in bulk by going to Invitee Management > Participation > Export Participants. Update the exported spreadsheet with participation information and then go back to the Participation section of Invitee Management and select Import Participants. You can also mark participants individually in Invitee Management.

Related Objective: Describe the differences and benefits of Kiosk Mode and the OnArrival App; understand the ways that these can improve participant tracking.

9. C – Event Details > Air Travel

To configure settings for Hotel or Air Widgets you will need to go back into the back-end and update in Event Details.

Related Objective: Create an event with travel enabled and add the travel widgets to your Registration Process.

10. B – False

In Test Mode you can complete up to 100 Test Registrations and send up to 100 Test Emails.

Related Objective: Understand how to send test scenarios to different groups of people with differing levels of access to Cvent.