

Cvent Tip of the Week: Week of May 25

Flex Version of Cvent, Email Design

Design an email template, drop in data tags, and send it once. Everyone on the invitation list will receive a personalized copy, like it was written just for them.

Creating a Flex Event Email

1 Access an invitation list. Begin by selecting your Flex event. Hover over Promotion & Communication and, under Email, select **Event Emails**. If your event has multiple invitation lists, select one from the drop downs at the top. Click **Create Email** to launch the email wizard.

2 Define the email's settings. Choose your starting point:

- **A new blank email** lets you write and format all the content from scratch.
- **Using an email template** lets you select an email created at the account level for use in any event. Click the ellipsis (...) in the field that appears and select the template from the pop-up.
- **Using an existing email in this event** lets you copy an existing event email and alter it. Click the ellipsis (...) in the field that appears and select the template from the pop-up.

Name your email.

Personalize the Subject or From Name fields by clicking the data tag icon next to each field and inserting data tags. Any replies to this message will go to the From Email Address. Don't see the address you want in the drop down? Add more in Admin> Email Settings> Email Addresses.

Basic Information

Type:	Custom
* Name:	Save the Date
* Subject:	The Home & Garden Tradeshow is Coming to Chicago
* From Name:	[[P-FIRST NAME]] [[P-LAST NAME]]
From Email Address:	ckobelski@j.mail
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No

Scroll down to the Send Settings section. Choose an audience from the drop down. These are the groups of people who have (or haven't) performed certain actions, such as registering, paying, cancelling, or declining your invitation. Leave *All Invitees* selected if you want this email to go to everyone on your invitation list.

NOTE: Depending on the audience you choose, you may not be able to manually send your email to them. Instead, you'll have to schedule it.

Determine when you want to send this email. You have two options:

- **Manually** is the better choice for one-off correspondence with specific invitees.
- **At the following date and time** is generally used when you want a particular audience to receive this information all at once. If you choose this option, enter a date, time, and time zone.

Click **Finish**.

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Creating a Flex Event Email

To Become Part of the Distribution List for Cvent Tips of the Week:

In the Chapter Relations Center, under Chapter Resources, Cvent, there is a sign up form to be added to our distribution list.

About Us

The Chapter Relations Team is always here for Chapter Assistance. If you ever have any questions or concerns please reach us at chapter@hfma.org

Join our Social Media Pages. Search for us based on the information below and join, follow or like!

[Instagram](#): [hfmadreamteam](#)

[LinkedIn](#): Chapter Relations Team

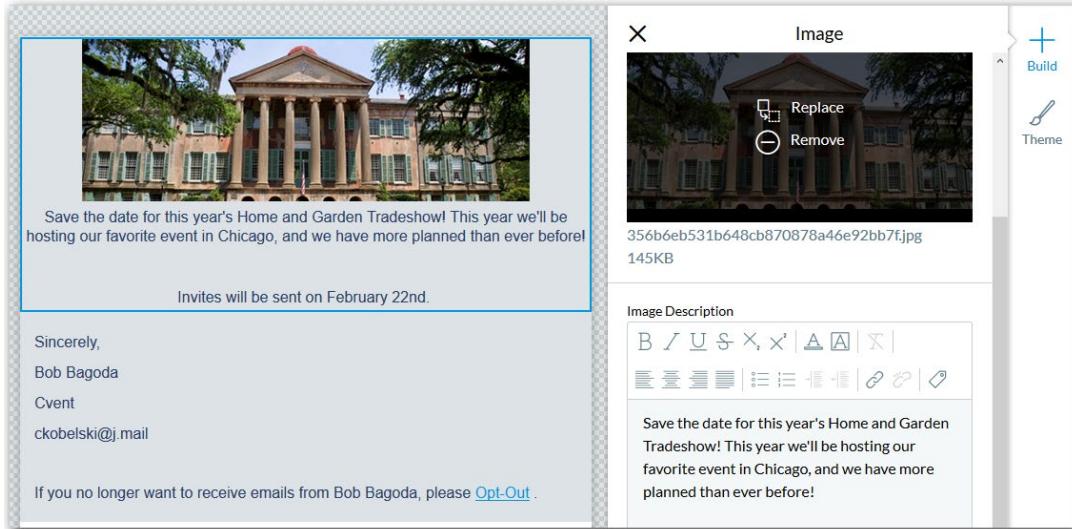
[Twitter](#): [@hfmadreamteam](#)

Leadership Connection Community – A new, one-stop destination for HFMA chapter news is here! Check out the Leadership Connection community group by logging into your HFMA account online and navigating to [Community](#); this group will be listed under My Groups. We've already been at work in the Leadership Connection group, posting discussions

3 Design your template. Click **Design Email** in the top right. Your canvas will be blank, aside from your footer. Click **Build** to the right of the canvas. Drag and drop the different widgets onto your canvas, building out your email.

and files to the Library, so get engaged and check it out!

NOTE: Some additional formatting, like custom fonts and rounded corners on buttons, may not render in the recipient's email. This is dependent on the settings of their email client.



NOTE: If your Flex event was created prior to October 31, 2018, you will not see the *Build* option to the right of the canvas. Instead, click **Code**. Customize the HTML code here and click **Apply changes**. Or, if you're not familiar with HTML code, click **Switch to Build mode**, then **Yes, continue**. Any code you've entered in Custom HTML mode will be lost once you switch over to Build mode.

To customize a block of text in the body of the email, click on the text widget. In the Configuration Options to the right of the canvas, change the colors of text, bold, italicize, and underline, adjust alignment, and insert bulleted lists, hyperlinks, and data tags.

Configuration Options

Text

A screenshot of the MailChimp text configuration options. It shows a toolbar with buttons for bold (B), italic (I), underline (U), and other text styles. Below the toolbar, there are buttons for alignment (left, center, right, justify), bullet points, and hyperlinks. A message in the text area says: "Please respond by clicking [[E-RSVP YES LINK]] or [[E-RSVP NO LINK]]." Below that, a bolded message says: "We look forward to your response!" and a link says: "Click here to visit our website." A cursor is hovering over the bold button in the toolbar.

To customize its text and design, click **Theme**. This section will allow you to change the styling of your email without needing to individually customizing each widget you add. You can switch back and forth between the build and theme widgets as often as you need.

NOTE: Any changes to the theme *will affect all email templates*. If you want to only update the email you're creating, click **Build**, select a widget, click **Customize** under Styling Options, and make the necessary edits. You'll need to do this for each widget.

4 Establish your email settings. Click on the name of your email in the top-left to open the Event Email drop down. Then click to the right of your email to open its settings.

Choose from the following email formats:

- **HTML only:** Only the HTML version of the email will send. If the recipient's mailbox cannot accept HTML emails, they'll receive an automatically rendered Plain Text version.
- **Plain Text only:** Only the Plain Text version of the email will send. Colors, graphics, and additional formatting are not supported.
- **HTML and Plain Text:** The HTML version of the email will send. If the recipient's mailbox cannot accept HTML emails, they'll receive the Plain Text version that you are able to customize. This ensures that no one will receive a blank or incomplete version of your email, as you can control the text and hyperlinks that are used.

Click the radio button next to the email format you want to use.

Then, determine if you want to use the applied header and footer, or none, and if you want to enable click-tracking for the HTML email.

Email Settings

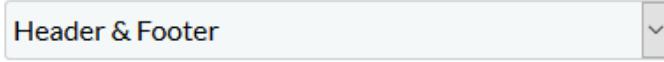
Select your email format

HTML only

Plain Text only

HTML and Plain Text

Applied header and footer



Enable click-tracking for the HTML email

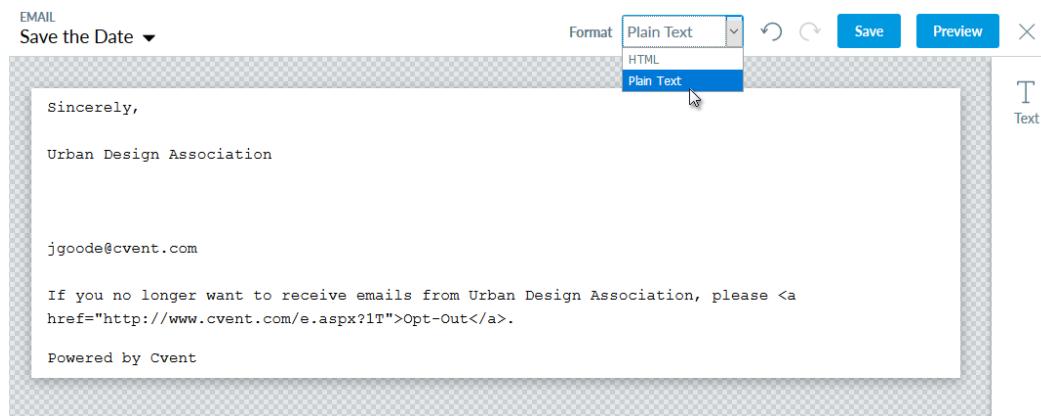


Apply

Cancel

Click **Apply**.

To customize the Plain Text version of your email, use the Format drop down in the top-right of the canvas to select **Plain Text**.



Click **Text** to the right of the canvas, then continue customizing your email content. Make it easier on yourself by clicking **Copy text from HTML email** to automatically copy the text and hyperlinks that you entered in your HTML email to this Plain Text

version.

Plain Text

Manage your plain text email.

[Copy text from HTML email](#)



Save the date for the {{E-TITLE}}!

Join us on {{E-START DATE:WCMMSD1C4}} for educational training sessions, networking events, and our grand ~~tradeshow~~ showcasing our top sponsors.

Sincerely,

[[P-FIRST NAME]] [[P-LAST NAME]]

[[COMPANY]]

[[P-EMAIL]]

If you no longer want to receive emails from [[P-FIRST NAME]] [[P-LAST NAME]], please [[EMAIL OPT OUT]].

5 Preview your template. In the top right, click **Preview**. View your email as an invitee would on a desktop, tablet, or mobile device. Click the **X** in the top right to return to the canvas and make any necessary changes.

Once you're done, click **Save**. Close out of the Email Designer.

6 Test your template. To send a test email to yourself or another user, hover over Send, and click **Test**. Select **Account User** from the Type drop down and click the ellipsis (...) at the end of the Recipient field. Locate the user when the pop-up appears and click **Select** to the left of their name. Click **Add Recipient** to send the test email to more people.

Click **Confirm Test Send**.

7 Adjust the advanced settings, if necessary. Select the neighboring tab, **Advanced Settings**, and click **Edit**.

If you would like to include recipients' CC email addresses, click **Yes** next to "Send an additional copy of the email each time it is sent." When the field appears, check the box next to "CC Email Address." If you've created custom contact fields to collect more CC emails, such as for secretaries or sales reps, they will appear here as well.



Sometimes email clients have issues with your code or images. To get around this, you can add a link directing recipients to view the email as a web page. Select **Yes** next to "Include a link to a web page version of this email." In the Link Text field, enter what you want to appear as a link. Then, go back to the Email Designer and insert the [E-EMAIL WEBPAGE LINK] data tag, found under the Event Email Web page category.

Need the limit which registration type triggers the email? How about only sending the email to invitees within a specific state? Set up a simple formula in the Advanced Filters section to limit when the custom email is triggered.

Begin by selecting a field from the first drop down, choose an operator from the second drop down, and enter a value in the text box. If you only want to send this email to registrants from the Thurman Alumni Association, your formula would be: *Company equals Thurman Alumni Association*.

Advanced Filters

Field	Operator	Value	Actions
Company	equals	Thuman Alumni Association	

[+ Add Filter](#) [And](#) [Or](#)

Click **Save**.

Thank you for reading the Cvent Tip of the Week. If you have any questions regarding Cvent please reach out to Erica Roccaro-Thorpe, Project Management Administrator, at ethorpe@hfma.org.