cvent

Account Management

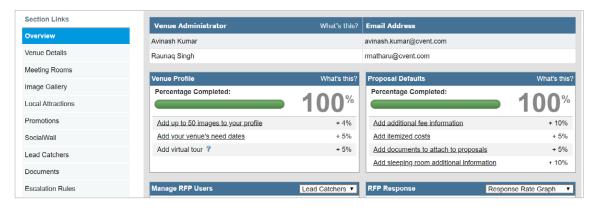
Adapting to your needs



As the industry fluctuates, so will your needs within your <u>Cvent Supplier Network (CSN)</u> account. Here are tips on how to update user access and visibility, run helpful reports, and decrease time spent on creating and sending proposals.

Set Up Your CSN Account

Make sure you have the appropriate **Venue Administrator** set up. This is the only person who can add, edit, or delete usernames, reset passwords, or control who has access to what.



Pro Tip: Learn more about your account including how to set up alerts and notifications here.

Manage RFP Users

You may need to temporarily deactivate or add new users.



Pro Tip: Make sure you properly define what that user will be able to see and do.



cvent

Set Up & Confirm RFP Defaults

Cut response time by <u>setting up defaults</u> for your introduction, estimated costs, taxes, and additional information fields so they'll populate automatically for each new proposal.

	Mark In Pro	gress Create	e Proposal Assig	n RFP Turn Down RFP	Actions 💌	Close	
∧ RFP S	apshot						
General	RFP Key Contact	Event Details	Event Requirement	Additional Questions			
	Venue Name:	Heaven Home					
	RFP Type:	Meeting Space and Guest Rooms					
	Proposal Status:	Awaiting Proposal					
	RFP Code:	P3N5XSLMPRF					
	Lead Source:	cvent s	Supplier Network	:			



5

Pro Tip: Get additional assistance on how to create a proposal <u>here.</u> Also take into account <u>these tips for maintaining a high bid rate.</u>

Take Advantage of Free Reports

Need to know how long it's taking to respond to leads? Wish you had contact information for every planner you've received an RFP from? Want to have an immediate prospect list? It only takes minutes to set up a report to get these answers!

Report Data Settings	X
Selection Criteria Fields	
Fields (113)	Only show selected fields
Display: All Categories	Q
RFP Details	Select All Deselect All
RFP Code RFP Name	*
Total Attendees	J

Pro Tip: Running the **"RFPs Won and Lost"** report will show you all RFPs you bid on over the past few years, this is a great prospecting list.

