

CVENT & CRM SUPPORT NEWSLETTER



Hello and welcome to the third edition of our Support Newsletter.

We publish our newsletter with an aim to give you useful information, support and the opportunity to be kept up to date with all that's going on in our world.

So, what do you need to know to be in the know? **Read on and see...**

WE'VE BEEN LISTENING

To be more proactive, we have taken our newsletter one step further and are proud to introduce you to our new Help Centre: <https://ecbcs.zendesk.com/hc/en-us>

Whilst our newsletter addresses what you should do (or in some cases should not do) to avoid complex problems arising, we understand that sometimes you just have a quick question that needs a quick answer. The Help Centre contains FAQ's, How-to Guides, Policy documents and will be the new home of our quarterly Support Newsletter.

In addition to the Help Centre and our Support Newsletter, we have also started pulling a weekly CRM report to spot any errors that have occurred on courses; that may not yet have been identified. We will be emailing Counties in due course to notify you of any errors and hope you find this information useful.

CVENT & CRM: NEW USERS

ALL new CVENT and CRM users are required to complete the following 2 E-Learning courses, prior to starting to use the systems:

- **Information Security**
(<http://booking.ecb.co.uk/d/x6q8jc>)
- **General Data Protection Regulation Training**
(<http://booking.ecb.co.uk/GDPRforCCB>)

This is mandatory and please note that spot checks are conducted to ensure system users have completed both courses.

CVENT & CRM: LICENSES

You could really help us by letting us know if your County has any CVENT or CRM licenses they don't need. These unused licenses can then be re-used / redistributed.

If a license holder from your County leaves your organisation / business area, you must inform us immediately (coach.education@ecb.co.uk)

This will ensure their access / license is removed so that confidential data can be maintained securely on our systems.

**** Remember... we are always on hand to help ****

1st4Sport: 0113 213 7610
coachingcricket@1st4sportqualifications.co.uk

Coachwise: 0113 213 7600
ecb@coachwise.ltd.uk

Coach Education: 0121 440 1748 /
coach.education@ecb.co.uk
Coach Development:
coachdevelopment@ecb.co.uk
Foundation 1: foundation.coach@ecb.co.uk

CVENT Support (for any technical issues that cannot be dealt with by ECB 1st/2nd line support):
0808 234 6914 /
Raise a support ticket through CVENT by logging in and clicking on 'Help & Support'

CHANGE ONE : CHANGE ALL

Scenario: Someone has contacted you as they need to change their personal details (e.g. married name, new address, new email etc.) If you are going to change someone's details on one system, then this change needs to be reflected on all our systems including; CVENT, CRM, Moodle (E-Learning) & icoachcricket. We appreciate that you may not be able to make changes on some systems due to your access level. If this is the case, contact us for guidance in the first instance before attempting to make any changes; coach.education@ecb.co.uk / 0121 440 1748.

Generally speaking; information only travels one way between CVENT and CRM - **from CVENT to CRM** - and not the other way around. Whilst most information goes automatically from CVENT to CRM, please note that if a trigger has already come and gone/passed, then you will need to contact us to reset the triggers; which will then push the information across from CVENT to CRM.

If you are unsure about making an amendment to someone's record, play it safe and contact us first.

CRM: MANUALLY ADDING LEARNERS

The CVENT system has been designed to ensure that information entered in to CVENT gets sent over to CRM. Sometimes an error will occur (either a system error or human error) that results in data not getting across to CRM and we have seen more and more cases of learners / delegates being manually added on to a course directly on CRM.

Please be advised that no learner should be manually added to a course on CRM.

If a learner has not come across to CRM from CVENT, please email us at coach.education@ecb.co.uk with the CVENT course code along with the learners' full name, DOB and email address. We will then confirm once the learner's details have successfully come across to CRM.

CVENT: EDITING TEMPLATES

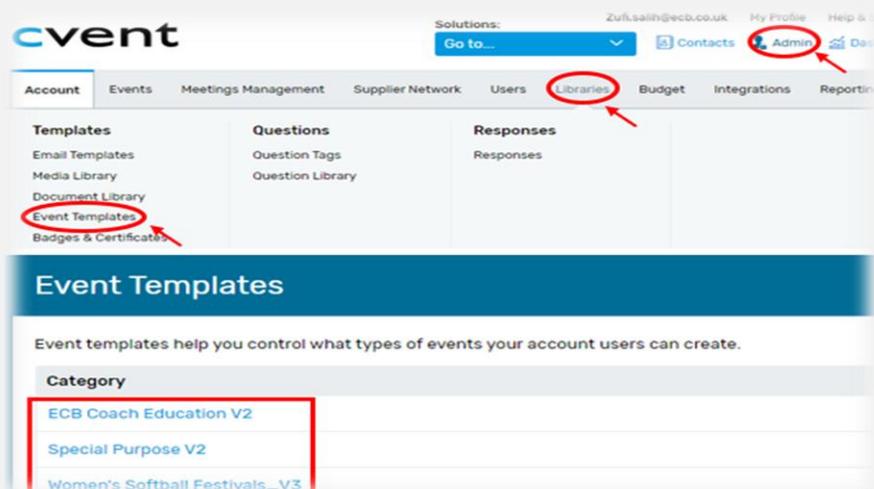
We have noticed more and more CVENT templates are being amended (freestyle) which is causing a lot of back-end issues to arise; requiring significant time (from both 1st & 2nd line support) to resolve the inevitable errors caused. CVENT templates are designed in a way to ensure that the data entered by a registrant, gets sent over correctly to our other linked systems such as CRM, Moodle etc.

By amending / deleting a 'Core Question' field in a CVENT template, this will corrupt the data and require both 1st and 2nd line support to resolve. If you decide to go ahead and amend CVENT templates without consulting us first, please note that the amount of support we can offer will be limited.

If you need an amendment made, contact us so first that we can advise you and if necessary, put you in touch with our 2nd line support team who will be able to assist / advise you further.

CVENT: TEMPLATE LIBRARIES

There is a template library in CVENT that is designed to be used to set up **all** ECB courses. To access it; Log in to CVENT > click on 'Admin' > hover over 'Libraries' > click on 'Event Templates' > click/select the relevant folder as needed. If you require any support to access a specific template, please get in touch.



If you wish to feedback your thoughts on this editions content or propose any new content for our next edition, please get in touch: coach.education@ecb.co.uk