Operational Checklist - Create an Event

1. Click the "Create New Event" button from the Home Screen	
☐	Enter in the following: • Name of group • Contracted inventory dates Note: This is the nights that the event has inventory. Do not include the check-out day • Select the Event Type • Leave the Reservation Methods at Website NOTE: Every event has an available web site and every event can have a rooming list. The "Reservation Methods" setting only tells the event creation wizard what steps to take. • Enter the group code to match what is in your CRS/PMS to link this group/event's reservations
☐	Create the event with a bundle • Select the appropriate bundle Note: This will pre-populate the event per settings/items from the chosen bundle
☐	Enter the room rates Note: Best practice is to enter the highest contracted rate for the room type and update on a nightly or sub-block basis if/when needed after the event has been built
☐	Click "Create Event"
2. In the Event Wizard	
☐	Verify all dates including; • Event Dates for Display (actual dates of the program) • Nights in the Contracted Room Block (contracted inventory nights for event, should NOT include Pre/Post nights) • Outside-of-Contract Extended Stay Nights o Nights before contract (pre-shoulder nights) o Nights after contract (post-shoulder nights) • Reservation Dates o Open (defaults to the day the event is built) o Close (last day Lanyon Passkey reservations/changes can be made and/or transferred from Passkey to your hotel system) o Cutoff (Contracted cut-off date for event) Changes to any of the above can be made by clicking on the pencil icon next to the item you wish to update, entering data into the field that appears and saving by clicking on the "Save" icon. Note: The Close Date listed represents the last date that any changes for the group can be made online and transferred from Lanyon Passkey to the PMS/CRS. The close date automatically defaults to what is set in the Bundle that you used to build the event. Regardless of whether or not new reservations will be allowed after the contracted cut-off date, best practice is to not match the close date and the cut-off date in Lanyon Passkey. If you do match the two dates, the only way attendees or planners can manage reservations is to call you directly.
☐	Add any hotel user(s) that you want to be an Event Contact to "My Events" (receive event specific internal smart alerts/emails)
☐	Under "Communications", turn on campaigns that should be sent for the group (Optional)
☐	Under "Smart Alerts", turn on SmartAlerts as needed (Optional)
☐	Add all inventory and confirm rates are correct per the contract
☐	Ensure any room types that will be offered as upsell are added to the group and input the appropriate upsell premium
☐	Click "Next" to go to the website page
☐	Click "Next" to go to the planner page
☐	Enter all Planner information and click the "Add Planner" button (Optional)
☐	Click "Complete and do not send Planner Email" at the bottom of the page
3. On the Event Home Screen	
☐	Add shoulder night inventory or turn on *Primary Inventory for shoulder nights (*See Primary Inventory below)

☐	Under Inventory Tasks, click “Manage Sub Blocks” and add any additional attendee types to the appropriate room types if needed (i.e. Staff, Concessions, etc.).
☐	Under Inventory Tasks, click “Manage Sub Blocks,” then “Add Rooms,” and add any additional Room Types if needed.
☐	Add upsell rates and inventory to necessary rooms if not completed through the wizard • Add the upsell premium amount in the “Room Settings” tab (amount of rate above the group rate, NOT the entire room rate)
☐	If there are any protected sub-blocks (additional attendee types): • Click the “View sub-blocks” link for the appropriate room type • Allocate the inventory to the appropriate sub block (i.e. Staff). NOTE: Inventory MUST be available at the ROOM TYPE LEVEL before it can be allocated to a sub-block • Update rates as/if needed for the sub-block • Click on “Inventory Details” • Ensure that “Free Sell” is set to OFF if this sub-block will only be able to access the inventory typed into/allocated to their sub-clock • Click the “Save” icon for that sub block (or the save button at the top and/or bottom of the screen) • Click on the “Sub-Block Settings” tab for the sub-block you are working on o Select the “Close” option under Call Center if your brand/property is using Lanyon Passkey for call center reservations and you do not want the call center to access this block o Select the “Close” option under Attendee Website if you do not want reservations to be made via the website for this block
4.	**Complete GroupLink Set-up** (If Auto-Approve is not used and/or you see PENDING under the APPROVED column)
☐	From the Event Home screen, click the “GroupLink” link near the top of the screen
☐	Event Tab (Must be completed before you can access the next tab) • Make sure the group code is entered • Click “Save”
☐	Rooms Tab (if you see PENDING and not COMPLETE) • Click the Room you want to work on OR click the “Edit Multiple” Button • If “Edit Multiple” was clicked, select the rooms to work on or the checkbox at the top left corner to select all room types • If “Edit Multiple” was clicked, tick the checkbox next to “Approve all rooms displayed on this page” directly below the “Edit Multiple” button • *Enter the Rate Code/Program for each room type, if/as needed. If your property does not use rate codes/programs, nothing needs to be entered on this page by default and you can skip to the next step *Note: Check with your system administrator to determine if you are required to use rate codes/programs • Click “Save”
☐	Groups Tab (if you see PENDING and not COMPLETE) • Click the Attendee Type you want to work with or click “Display Multiple” • If “edit Multiple” was clicked, tick the check box to the left of the Attendee types you would like to work with or tick the checkbox at the top left corner to select all groups (attendee types) and click “Display Selected” • If “edit Multiple was clicked, tick the checkbox next to “Approve all groups displayed on this page” just below the “edit Multiple button • Update any group codes and verify payment types, if/as needed. If nothing needs to be updated, skip to the next step • Click “Save” • If asked if you would like to automatically update/approve the Blocks Tab click “OK”, then “OK” again to save
☐	Blocks Tab (if you see PENDING and not COMPLETE) • Click on the block (attendee type in a room type) you want to work with or click “Display Multiple” • If “Edit Multiple” was clicked, select the blocks to work on or the check box at the top left corner to select all clocks • If “edit Multiple was clicked, tick the checkbox next to “Approve all blocks displayed on this page” directly under the “Display Multiple” button • Update sub-block details, if/as needed

	• Click “Save”
5. Primary Inventory Settings and Enabling Additional Room Types	
Primary Inventory will allow groups to pull from a common pool of inventory managed in a central area within Lanyon Passkey. The use of Primary inventory is strongly recommended for upsell inventory, shoulder nights and any rooms that should be made available over and above the contracted room block. Based upon the settings within your bundles, Primary Inventory can be automatically enabled for specific room types. Note: If Primary Inventory is not managed automatically via ARI, verify that inventory and rates have been added to Primary Inventory.	
☐	If a room has not yet been enabled, from the Event Home screen under the room type: • Click on “Primary” • Click the button from “off” to “on” for any night you want to enable Primary Inventory
☐	To ensure that a room type will always sell at the highest rate between the group rate and the Primary Inventory rate: • From the “Event Home” screen, click on the “Primary” tab under the room type • Click the “Sell at Highest Available Rate” button from “off” to “on”
6. Notify Convention Services/Event Management that the Group is Ready to be Customized	
☐	Notify the next person that needs to work on the group that it is ready to be customized if needed and that the Meeting Planner Email can be sent