Cvent Passkey User Guide

For Meeting Planners using the Multi-Tab Event Dashboard

Getting Access

Planners will receive an introduction email from the hotel or event organizer containing information related to your event.

- Reservation Website URL: Click or copy the link to make individual reservations online.
- Event Dashboard Link: Click the link to login or create an account, and begin using your online event dashboard

IMPORTANT INFORMATION ABOUT YOUR UPCOMING EVENT

Hello Mary,

We wish to share with you important information to facilitate the hotel booking process for your upcoming event:

Event name (Jan 16, 2020 to Jan 20, 2020)

MAKING RESERVATIONS

A dedicated website is now available for your attendees to book their hotel rooms online. Reservations can be made starting Jan 15, 2020 at this web address:

Booking Website:
http://aws.passkey.com/e/EventIDgoesHere

It is important that you share this web address with your attendees as soon as possible. There are several ways to do so:

Email:	Copy/paste the web address into an email to your attendees
Website:	Display it on your event website
Social:	Display it on any social networks related to the event

TRACKING YOUR EVENT

We are providing an online dashboard for the event so you can view reservations, run reports, monitor critical stats and more at your convenience:

Event Dashboard

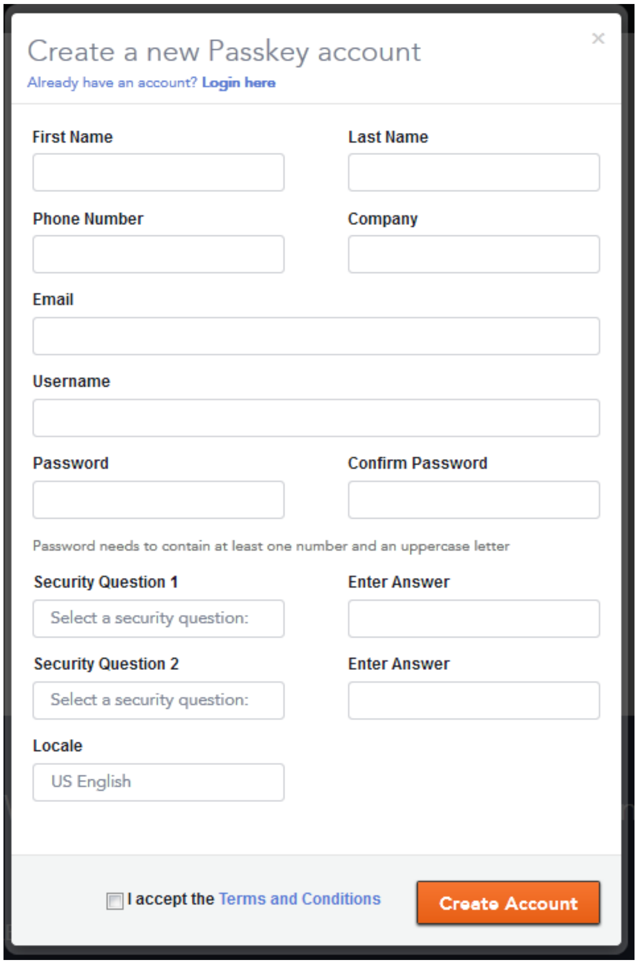
Thank you,
(Name of Hotel or Organization)

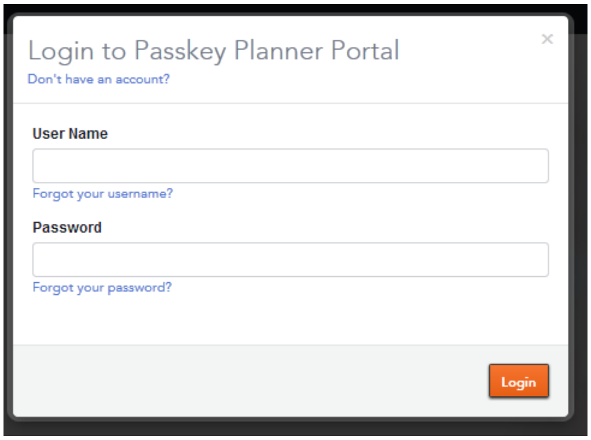
** Example email only. Content and formatting may vary.*

Creating an Account

The link in the introduction email will take you to the Planner Portal (https://planners.passkey.com). If you have never created an account with Passkey using the email address you gave to the hotel or event organizer you will be prompted to complete the form presented to create your complimentary account. You may also access the account creation form by clicking on the "Create new account" link on the portal home page. All fields are required. Agree to the "terms and conditions" and click Create Account. An email will be sent to the email address entered on the form. Click the link in the email to confirm your account creation and your account is created. You may now login.

If you already have an account, you will be presented with the Loginform. You may also access the login form by clicking on the "Login" button at the top of the portal home page. Enter your username and password and click Login. Use the "Forgot your username?" and "Forgot your password?" links to retrieve and/or reset your login credentials.





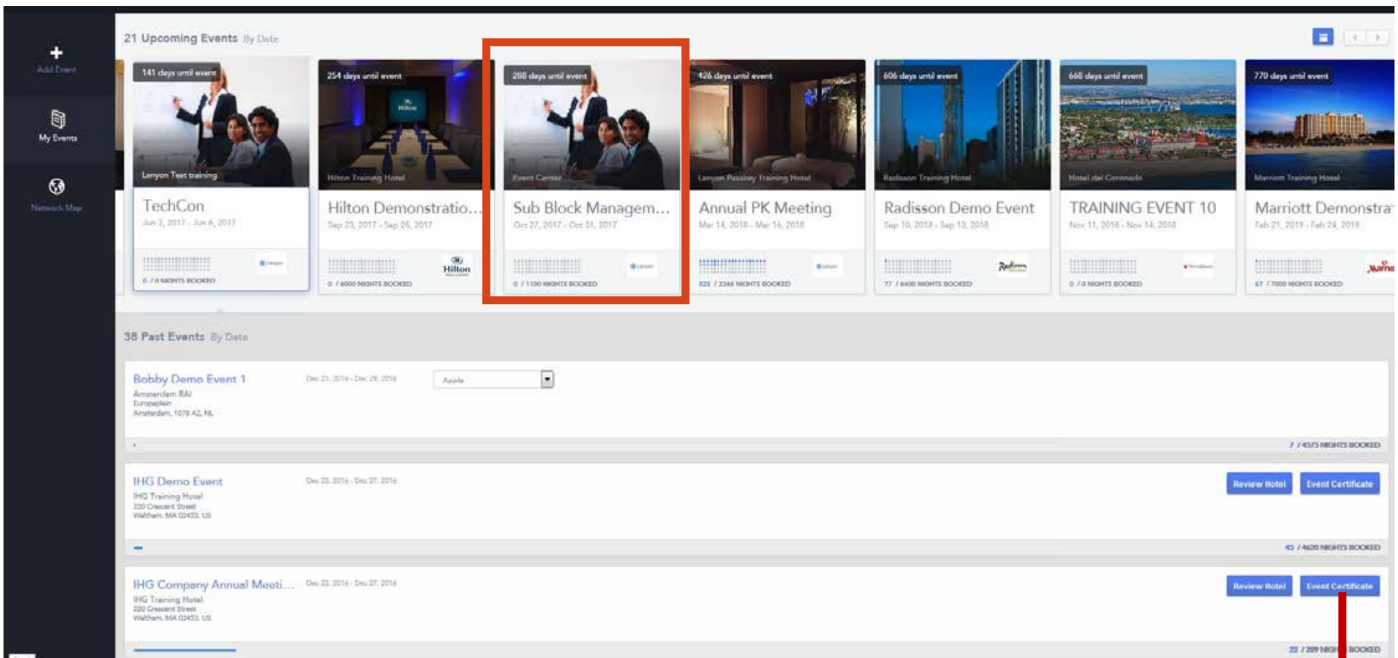
NOTE: Planners create their own accounts to access the Planner Portal and Event Dashboards. Hotels and Event Organizers do not have access to a planner's login credentials. Contact Cvent Passkey Support for assistance with that.

Accessing the Event Dashboard

Once you have logged in to the Planner Portal, you will see your current, open event(s) at the top of the Homepage.

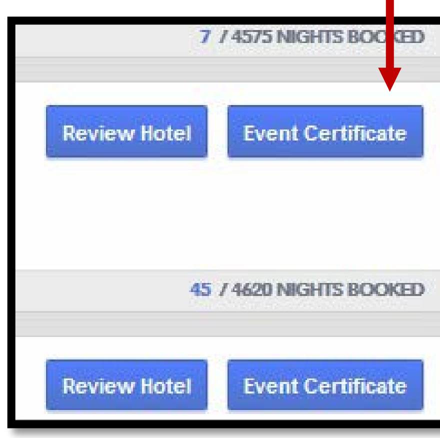
NOTE: Planners are associated to events via their email address. If you do not see your event on the portal home page, contact the hotel or event organizer and make sure they have added you as the planner to the event with the exact same email address that you used to create your Planner Portal account.

Click on the event card at the top of the portal home page to access that event's dashboard.



Closed/past events will be listed below your open/current event(s). Clickon the name of the event to access that event's dashboard (NOTE: Closed/past event dashboards will have limited functionality)

Click on "Review Hotel" to complete a short 5 question review, along with any desired comments that will be sent to the hotel or event organizer. Click on "Event Certificate" to access a visual report on your pick-up and pace from past events that may be shared with others.



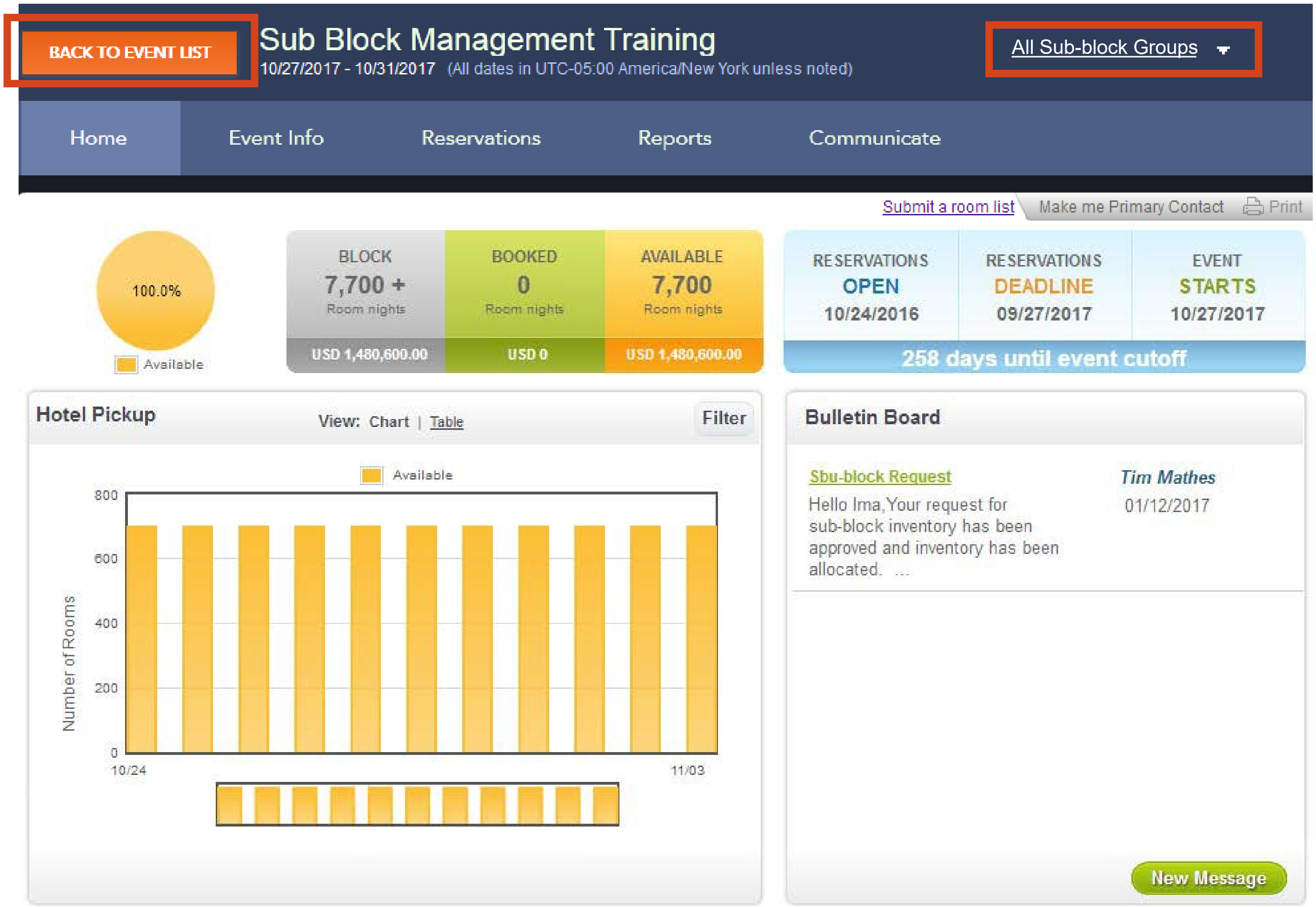
Home Tab

On the Event Dashboard Home screen, you will find numbers and charts on your room block and availability (or just your particular sub-block if you are a sub-block Planner only) as well as important dates and the Bulletin Board.

The tabs along the top of the page will take you to the other sections of the dashboard. **Home**, **Event Info**, **Reservations**, **Reports** and **Communicate**. Availability of the tabs may vary from event to event and/or during an event, depending on what has been enabled by the hotel or event organizer and any access dates settings.

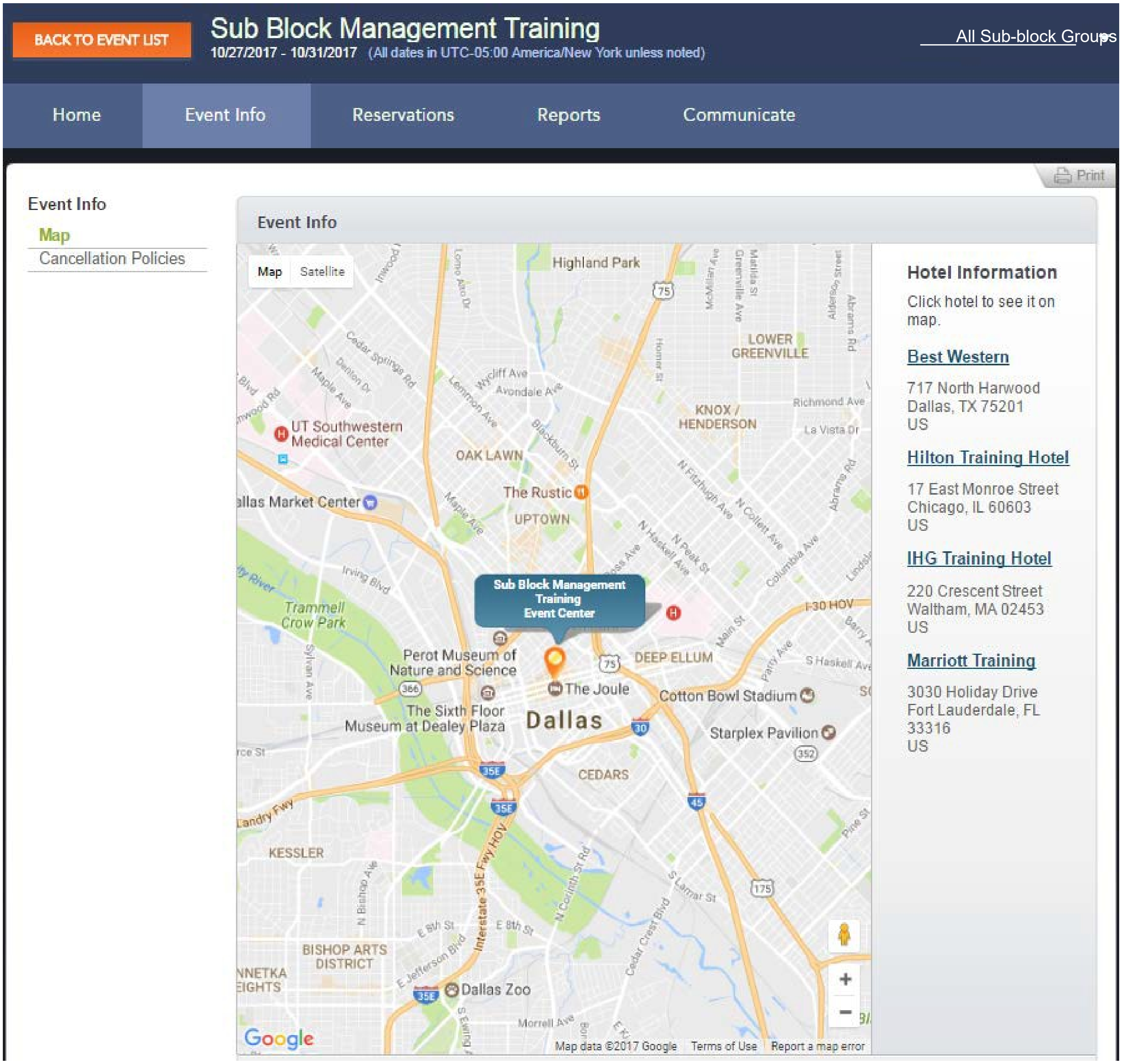
If you are the Event Planner and there are sub-block groups for the event, you can switch from viewing/managing the entire event's dashboard (All Sub-block Groups) to any available sub-block dashboard from the drop down on the top right. Sub-block planners can only view and/or manage details for their particular sub-block.

Clicking on the BACK TO EVENT LIST button will take you back to the Planner Portal home screen



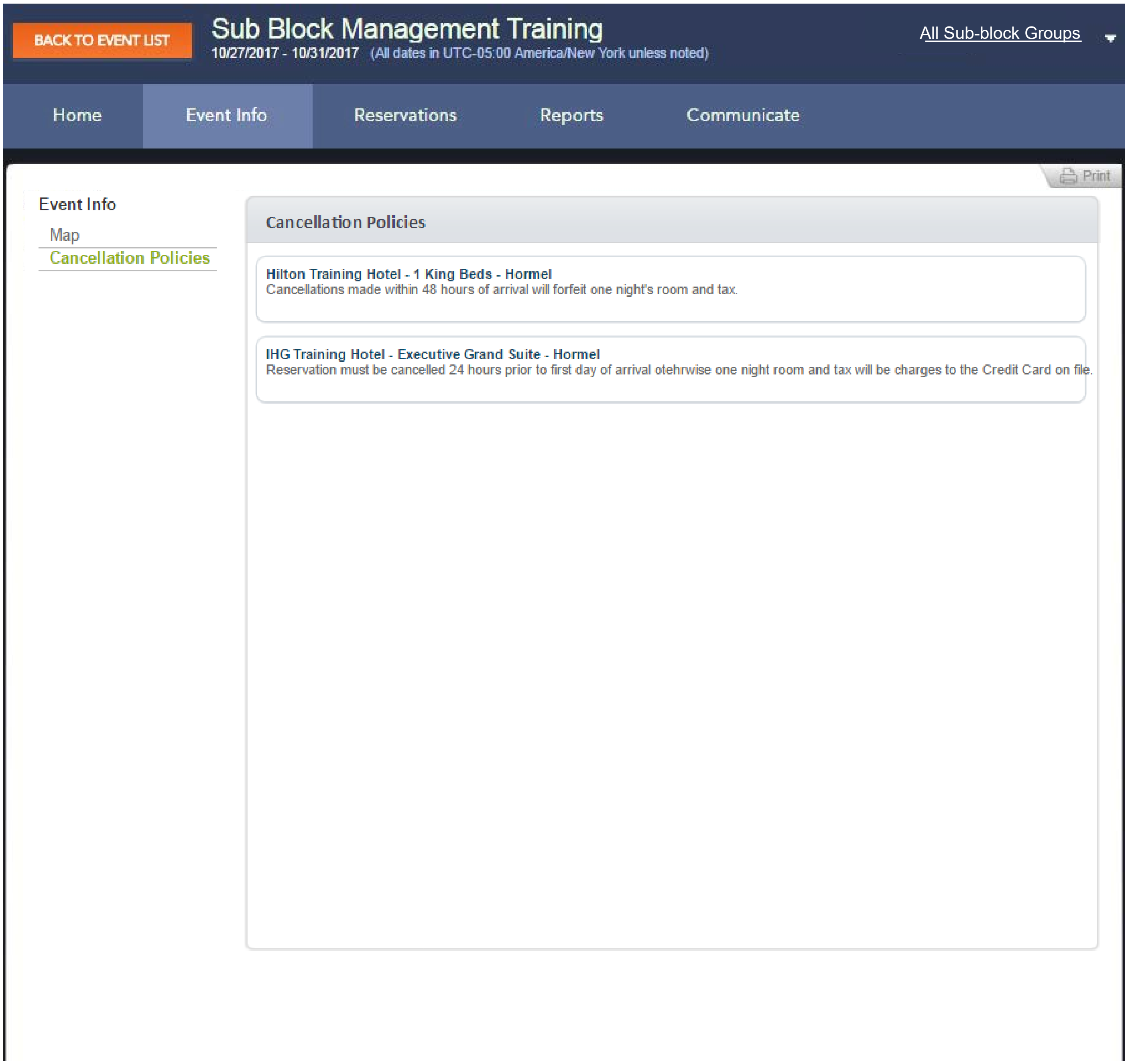
Event Info Tab

The Event Info tab will show you a map of either the hotel for single hotel events or the event venue for multi hotel events created by event organizers. Clicking on the name of participating hotels to the right of the map will display that hotel on the map.



Event Info Tab (cont.)

Clicking on Cancellation Policies will display cancellation policies for the hotel or participating hotels in multiple hotel events by sub-block and room type. This is the cancellation policy(ies) for reservations and not event cancelation with the hotel or event organizer.



Reservations Tab

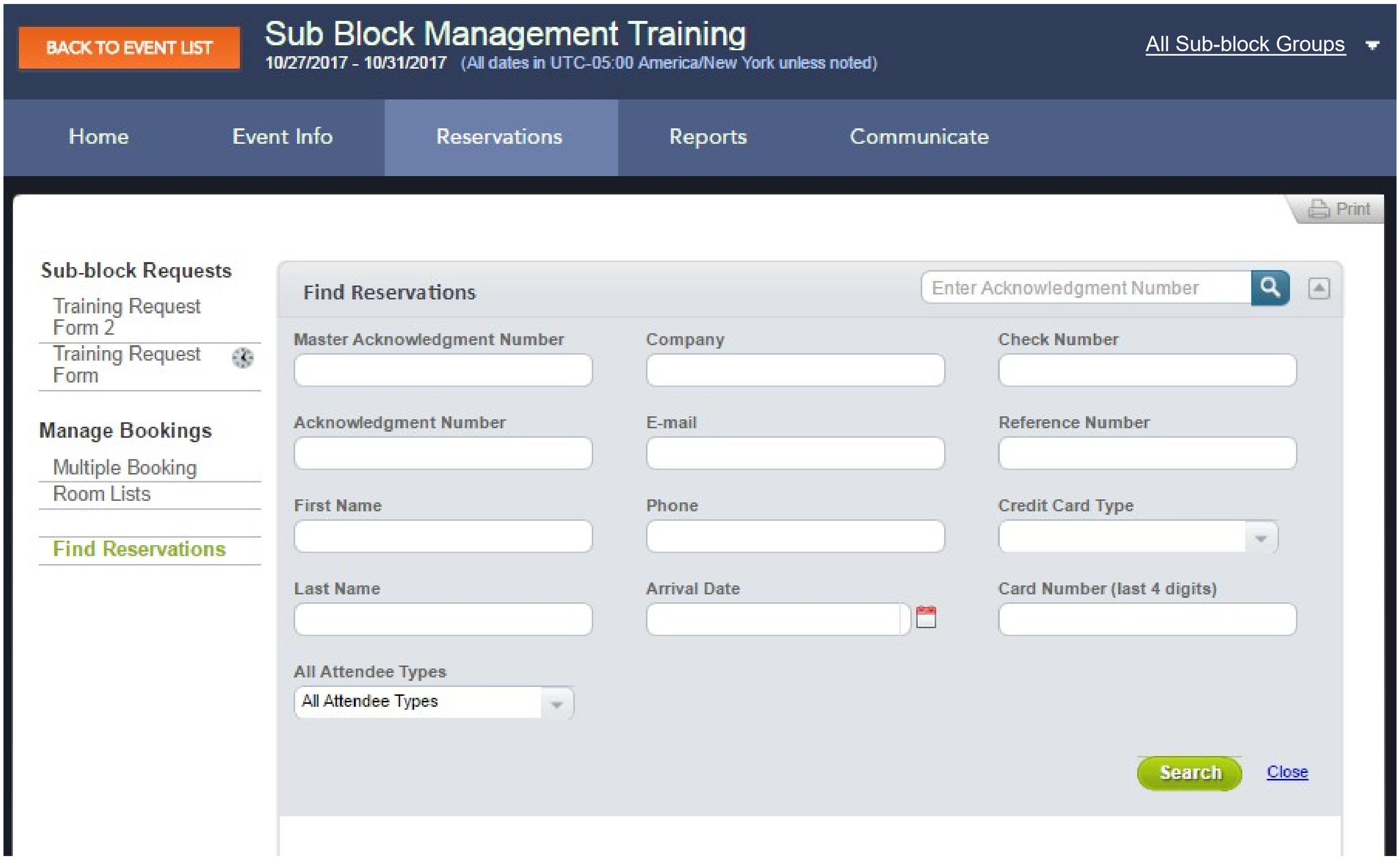
When accessing the reservations tab, the Find Reservations form will initially be displayed, along with links to other room reservation tools available if enabled by the hotel or event organizer.

Find a reservation: Enter search criteria in any field and click the “Search” button to find a specific reservation. Clicking on the “Search” button without entering any criteria will display all reservations.

Sub-Block Requests: If the event organizer is using the Sub-Block request tool the available sub-block request form(s) links will be displayed in the menu to the left.

Multiple Booking: Access the Multiple Room Booking Tool (MRB) to make and/or manage reservations for your event or sub-block.

Room Lists: Allows planners to submit an Excel or CSV file with room list data to a hotel or event organizer in a secure, PCI compliant environment.

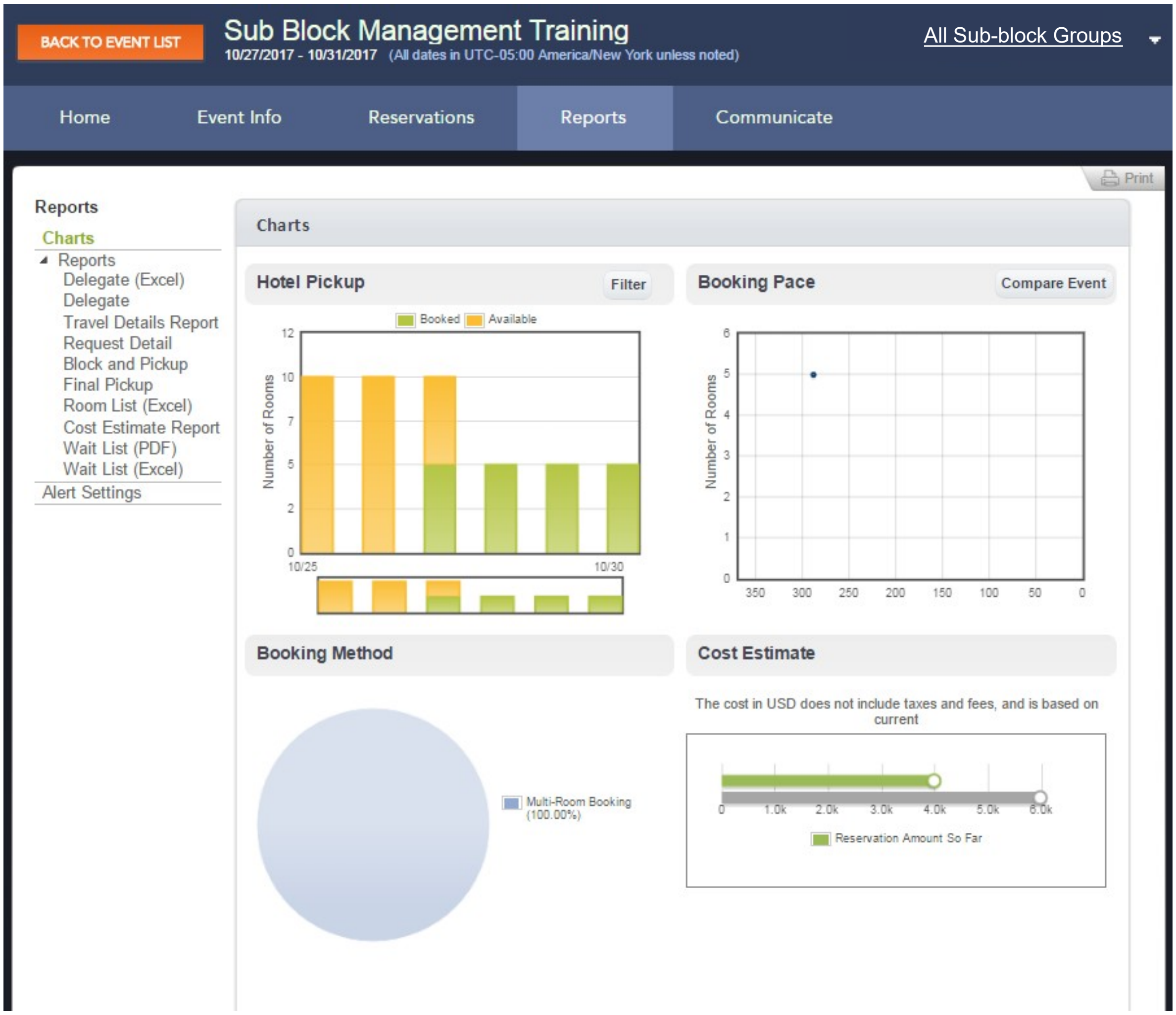


Reports Tab

Charts: When accessing the reports tab, a variety of charts and will be display if enabled by the hotel or event organizer including Hotel Pickup, Pace, Booking Method and Cost Estimate

Reports: Available reports will be listed in the left menu as enabled by the hotel or event organizer including Delegate, Travel Details, Request Details, Block & Pick-up, Final Pickup, Room list, Cost Estimate and Wait List reports. See Running Reports for details on using this tool.

Alert Settings: Alerts Settings will allow planners to manage existing inventory alerts as set up by the hotel of event organizer or to create their own. This will send an email to the planner when a preset percentage of the block has been picked up. See Working With Alerts for details on using this tool.

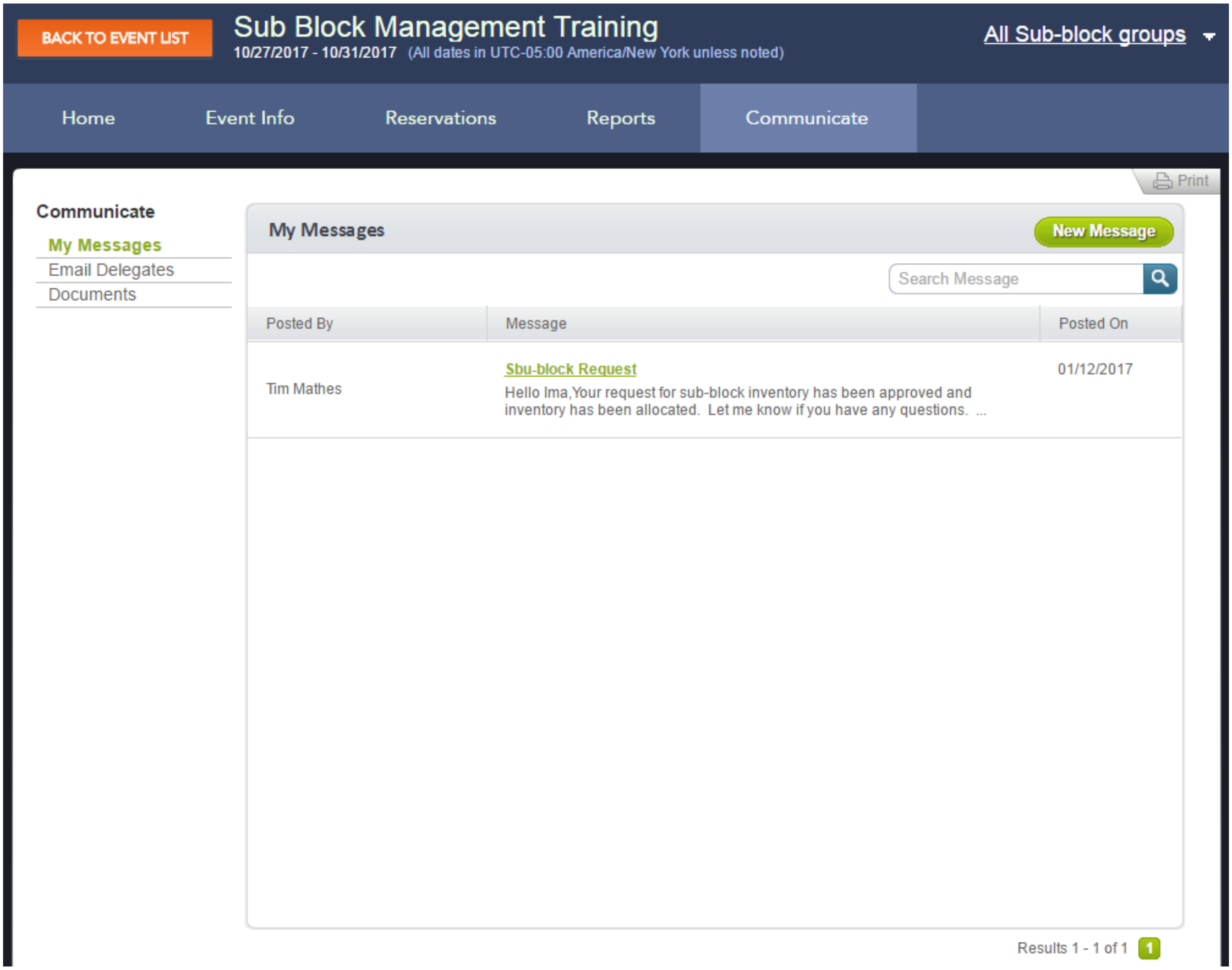


Communicate Tab

My Messages: As on the home tab, the Communicate tab will display the bulletin board messages under the heading, "My Messages" where hotels or event organizers can post messages for Planners and Planners can communicate with each other.

Email Delegates: If enabled by the hotel or event organizer, planners can send out email campaigns that have been turned on by the hotel or event organizer or create their own.

Documents: If enabled by the hotel or event organizer, all parties can upload documents for easy access.



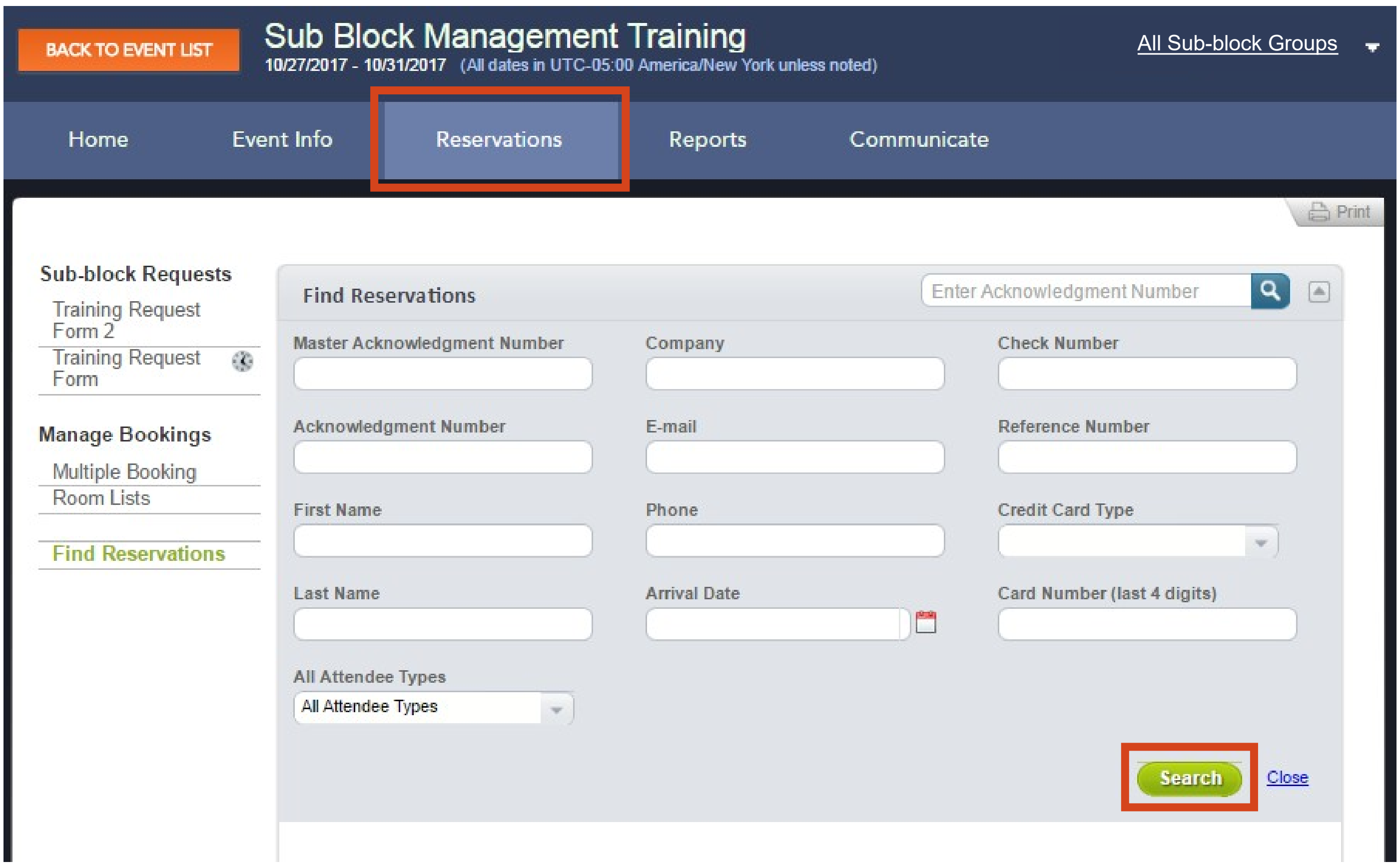
Working with Reservations

If the hotel or event organizer has enabled the feature, Event Planners can manage all reservations that have been made for the event or even make new reservations for attendees. Sub-block Planners can only manage reservations for their Sub-block.

Modifying an existing reservation – Click on the Reservations tab to begin working with your reservations. The Find Reservations search form will be displayed when you access the Reservations tab.

- Enter data into any of the fields and click the “Search” button to work with a specific reservation.
- Leave the search form blank and click the “Search” button to view a list of all reservations.

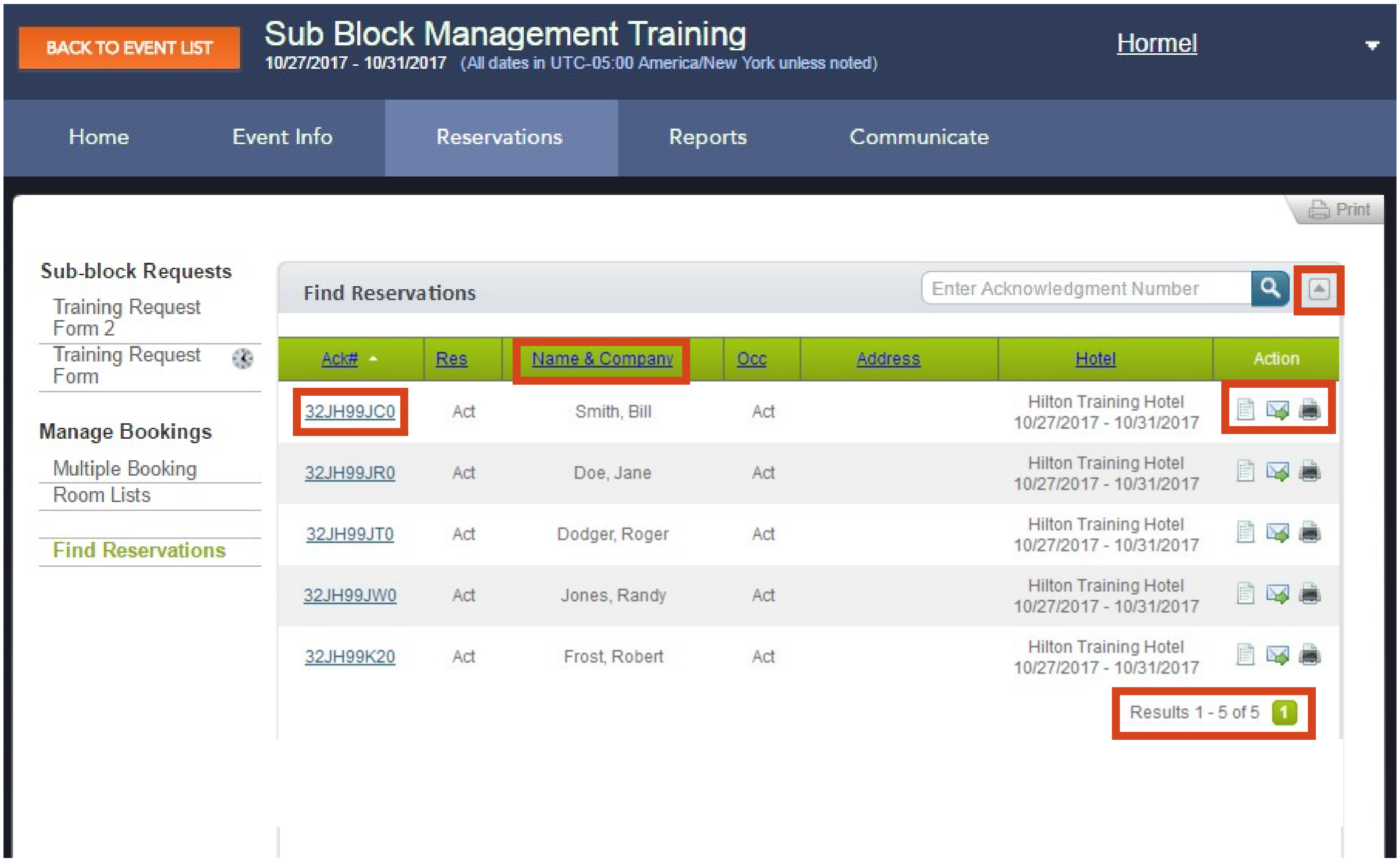
NOTE: You can also click the “Multiple Booking” link in the left menu, then click on the Reservations tab of the MRB to view all reservations in the MRB tool.



Working with Reservations (cont.)

Search results will be displayed where the search form was located.

- Clicking the acknowledgment number (Ack# column) will open that reservation in the MRB so that it can be modified.
- Clicking on the paper icon will display the reservation summary in a popup.
- Clicking on the envelope with the arrow icon will resend the acknowledgment email to the attendee.
- Clicking on the printer icon will open a printer friendly version of the reservation summary in a new tab or window.
- You can change the sort order of a column by clicking on the column header.
- Number of search results and any pagination will be displayed at the bottom of the list.
- Clicking on the up arrow to the right of the search form will display the search form again if you wish to modify your search.



Sub-block Requests

If the event organizer is using the Sub-block Requests tool and has sent you a notification that you have an option to request a block of rooms for an event, you can use the event dashboard to complete the form provided to request a block of rooms, a block of rooms at a specific hotel or multiple hotels, provide some parameters for your request and send any special requests to the organizer concerning your block.

NOTE: Availability of the request form options will depend upon what the event organizer has enabled.

There are two types of Sub-Block Request that can be enabled by the event organizer. Both types will consist of a two (2) page form.

- **Night by Night Request Total –** This option will not list any hotels on the request form. It allows the contact to request a night by night block of rooms for the event that is NOT hotel specific.
- **Night by Night Request by Hotel –** This option lists available hotels as configured by the event organizer. The contact can request a night by night block of rooms for the event at one or more specific hotels that are participating in the event's total room block.

The event organizer will create a Sub-block Group (specific company/office or maybe a particular team for a sporting event) and add a contact(s) to that group (Sub-block Planner(s)). The event organizer can use the built in tools to notify the contact via email or may from outside of the tool in another manner. This system email contact method will have a link to the Planner Portal. If the link is not provided by the event organizer, planners can always access the portal by opening an internet browser and navigating to https://planners.passkey.com.

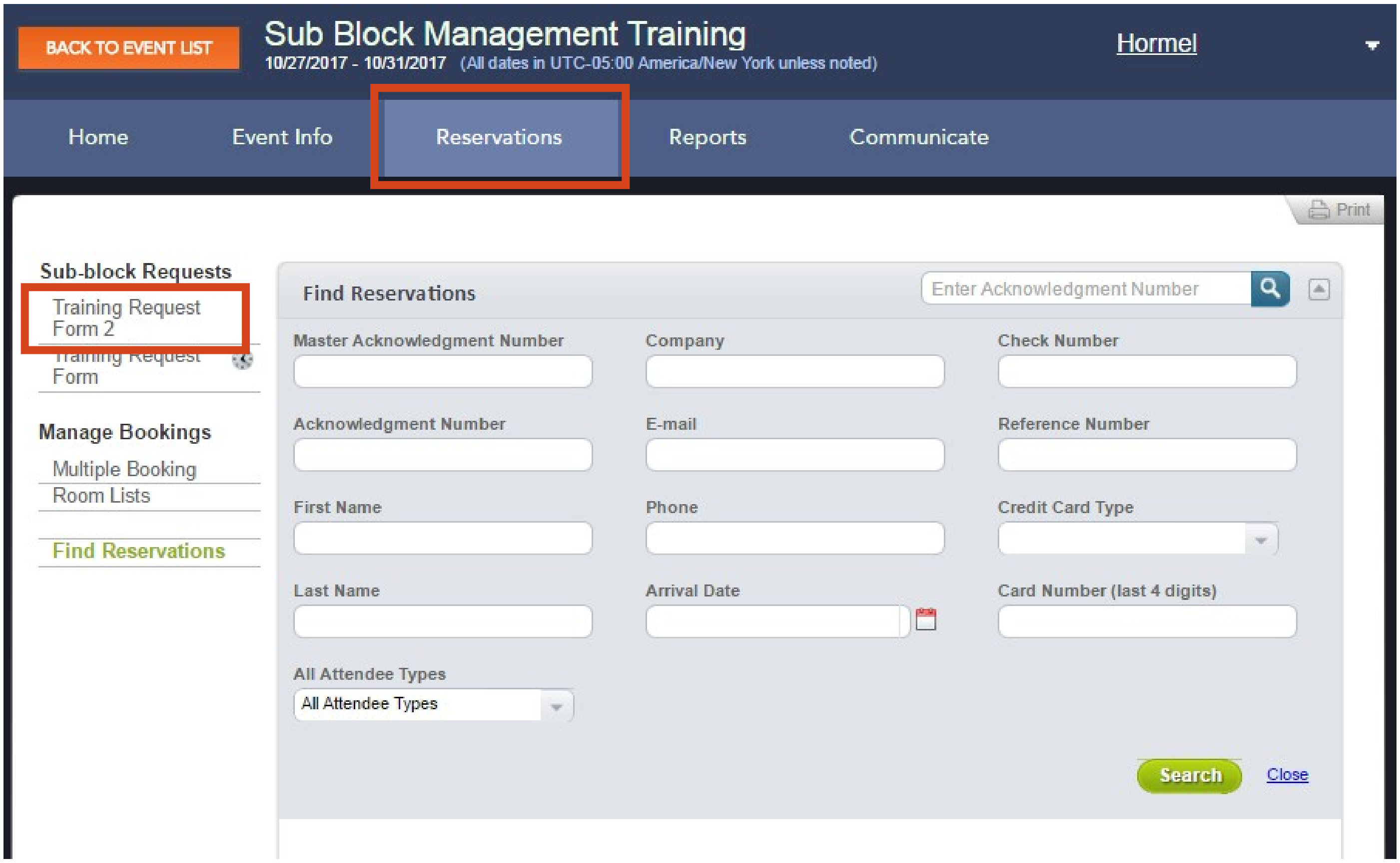
Contacts will be notified again once/if the event organizer has accepted the request and has allocated specific rooms at a hotel(s) with information on rates, etc. Reservations can then be made via options enabled by the event organizer once reservations have opened.

NOTE: The event organizer may not be able to fulfill all sub-block requests for the event or for specific requested hotels and may allocate rooms for the requested block at hotels that were not initially requested. Contact your event organizer directly for information/details on any allocated rooms.

Sub-block Requests (cont.)

Completing a Sub-block Request – Once a planner has been notified by the event organizer, either via a system email or another via another method, planners can complete the request form to get a block of rooms.

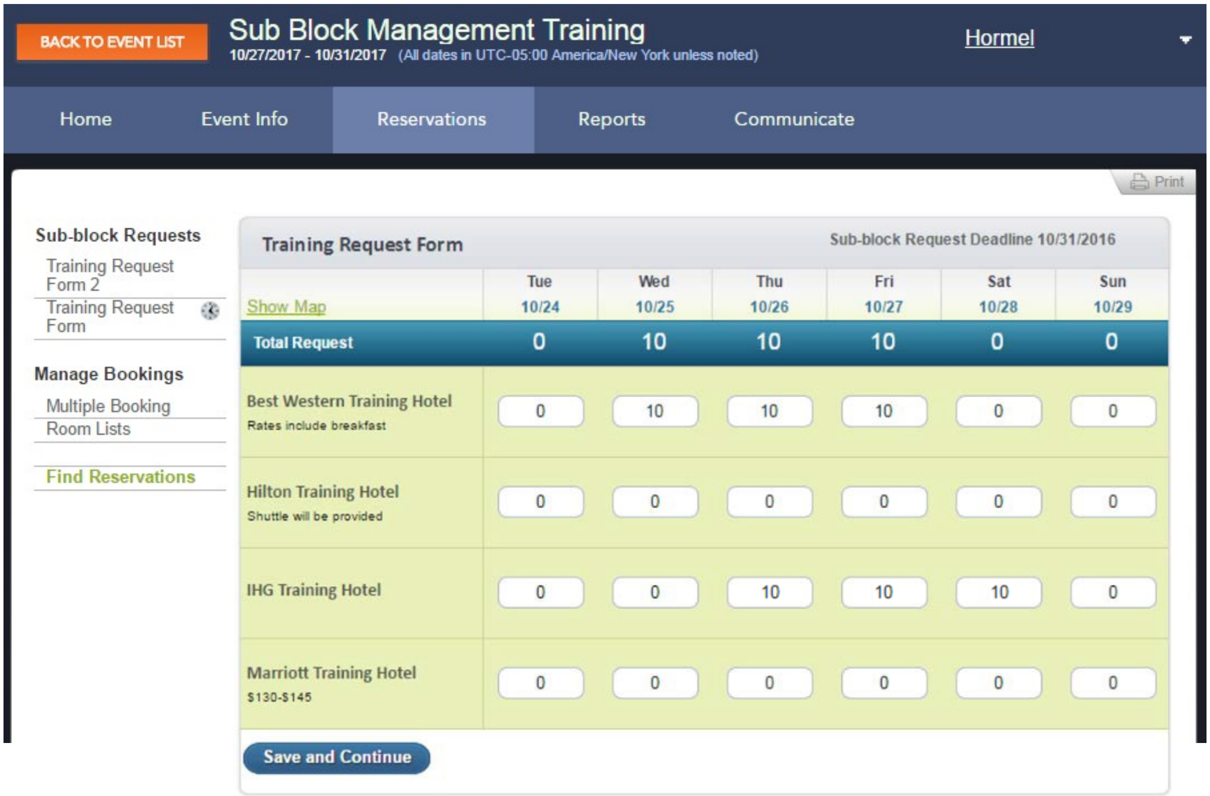
1. Click on the link in the system email or access the Planner Portal at https://planners.passkey.com. If you have never created a Passkey planner account via the email that the planner used to add you as a contact to the sub- block group, you will be prompted to create an complimentary account. If you already have an account used for any event, you can simply log in.
2. Click on the card for the event you want to complete the request form for to open that event's dashboard.
3. Click on the Reservations tab.
4. Click on the name of the form in the menu to the left under Sub-block Requests.



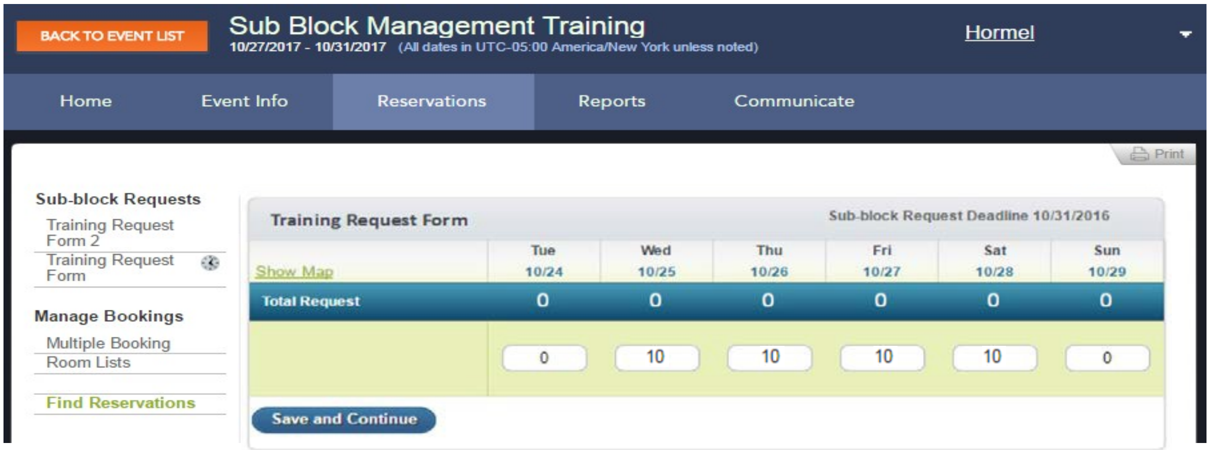
Sub-block Requests (cont.)

5. Enter the number of rooms you want for your block

For a **Night by Night by Hotel** request, enter the number of rooms you are requesting by night at the hotel(s) you wouldlike.



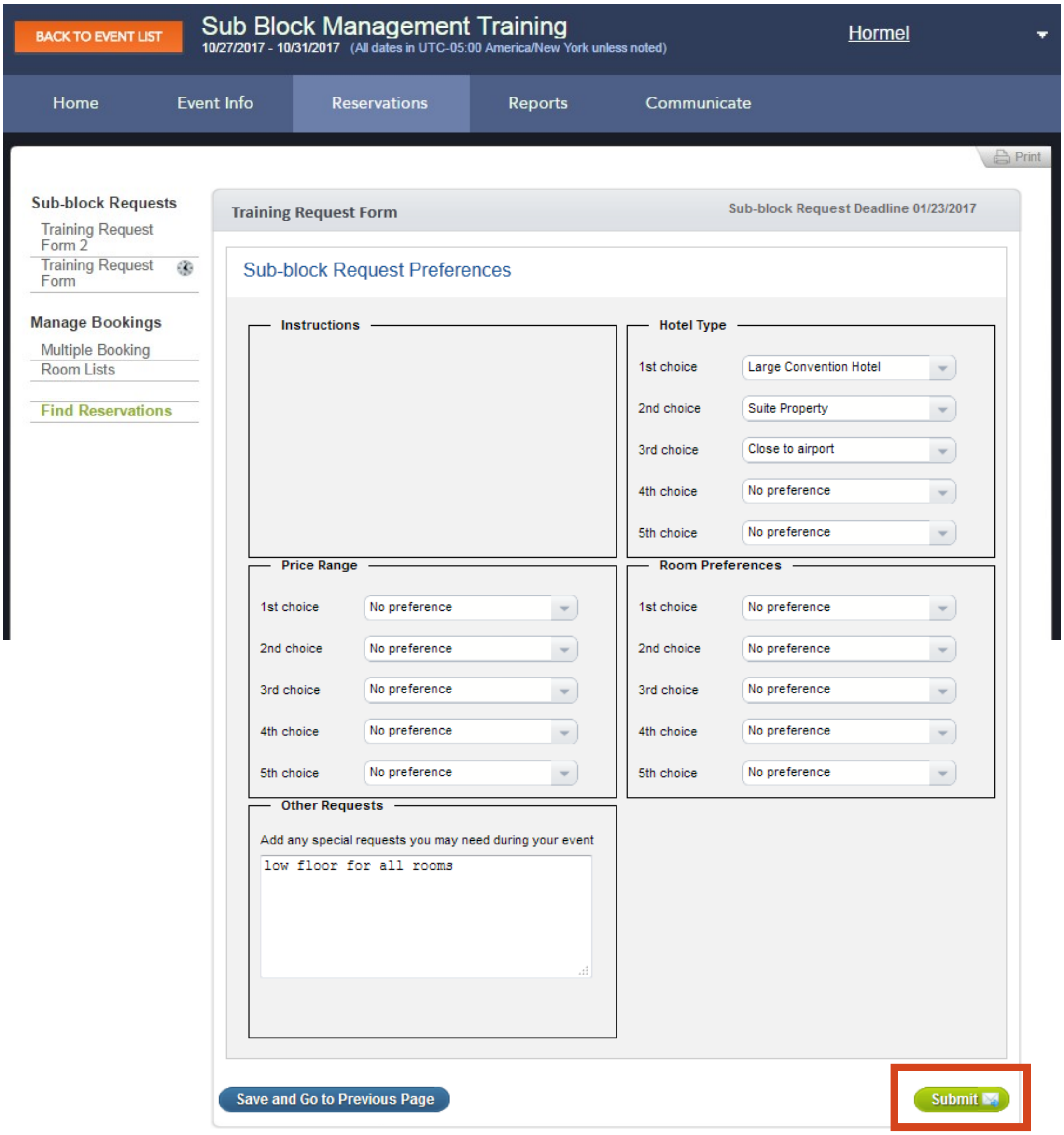
For a **Night by Night Total** request, enter the number of rooms you are requesting by night.



6. Click the “Save and Continue” button to proceed to page two (2) of the form.

Sub-block Requests (cont.)

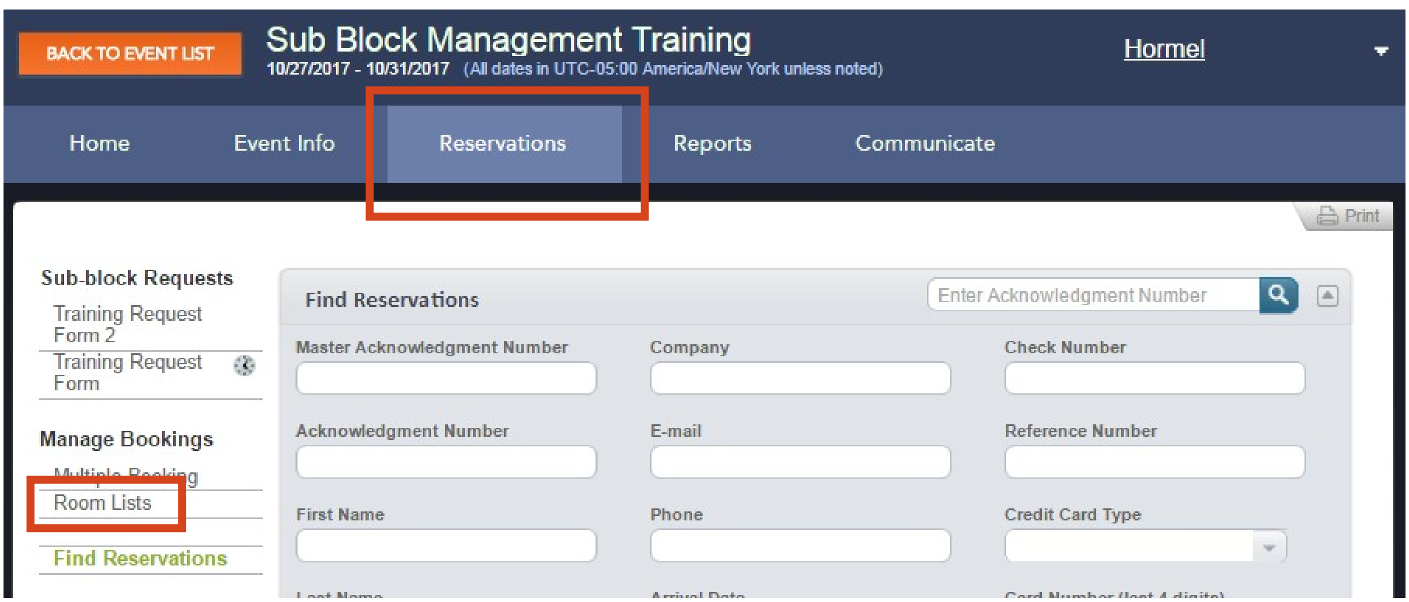
7. Make selections from any available dropdown menu options that appear on page two (2) of the request form. Options may include room type preferences, bed type, price range, hotel type, etc.)
8. Enter any information or request details you would like to send to the event organizer in the available textfield.
9. To save the request data but NOT submit it to the event organizer, click the “Save and Go to Previous Page” button. To submit the request to the event organizer, click the “Submit” button. You will be prompted to confirm that you would like to submit the form. Click “Submit”. You will be notified that the data was submitted. Click “Ok”



Submit a Room List

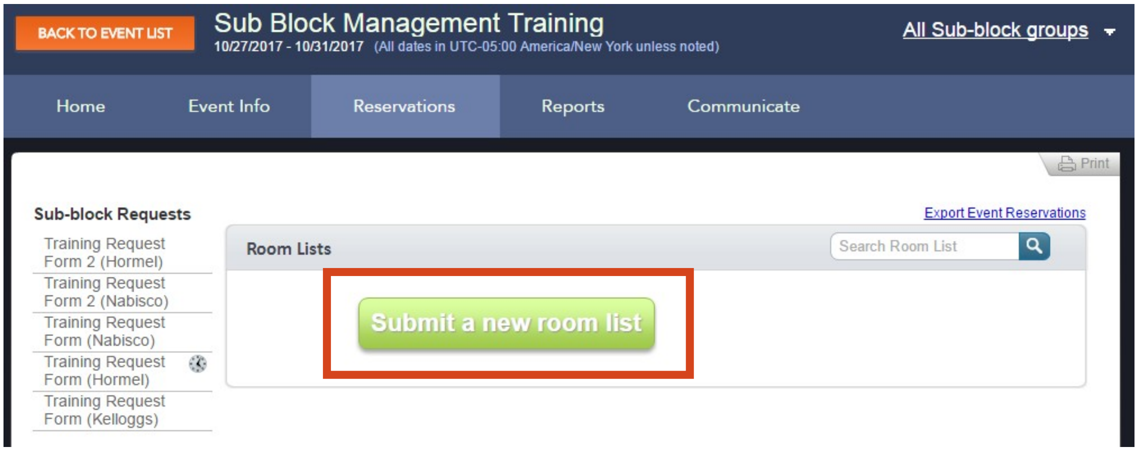
Using the Room List Manager to send your list to the hotel or event organizer is secure and PCI compliant. Only hotel or event organizer users who have access to credit card data will be able to see the card information if present in the list.

Uploading a List: Click on the “Submit a room list link” on the home page or click on the Reservations tab, then on RoomLists

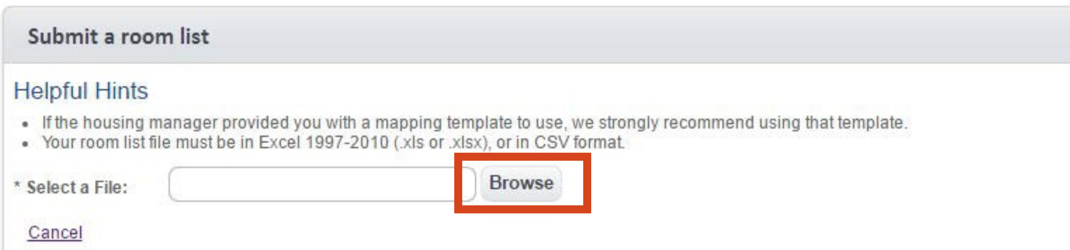


Submit a Room List (cont.)

Click on the “Submit a new room list” button.



Click the “Browse” button to find the Excel (.xls or .xlsx) or .csv (comma separated value) file on your computer.



Once you have selected your file you will be presented with further options to complete.

Enter a name for your file. By default the name of the file will be used. If you have more than one list for the event, each list must have a unique name.

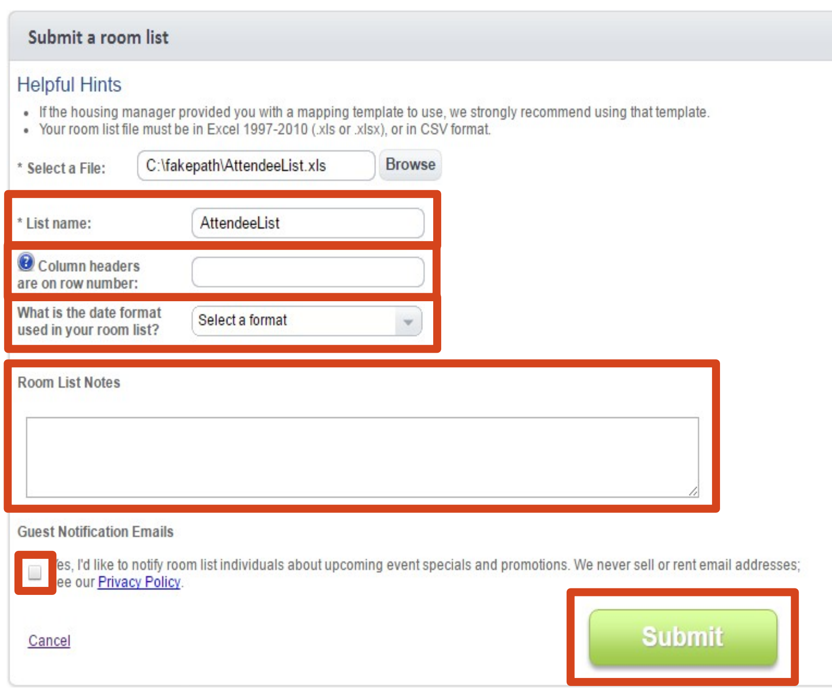
Enter the row that contain the column headers.

Select the date format used in your file.

Enter any note you want to send to the hotel or event organizer about this list.

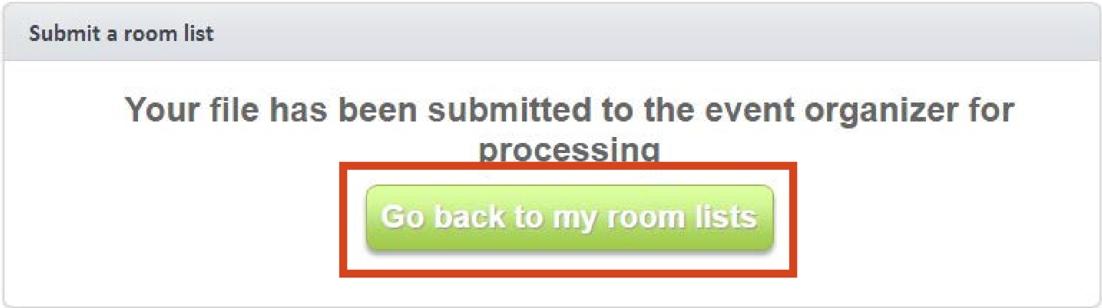
Tick the check box under Guest Notification Emails if you would like your guests to receive promotional and/or informational emails for this event (Opt in).

Click the “Submit” button.

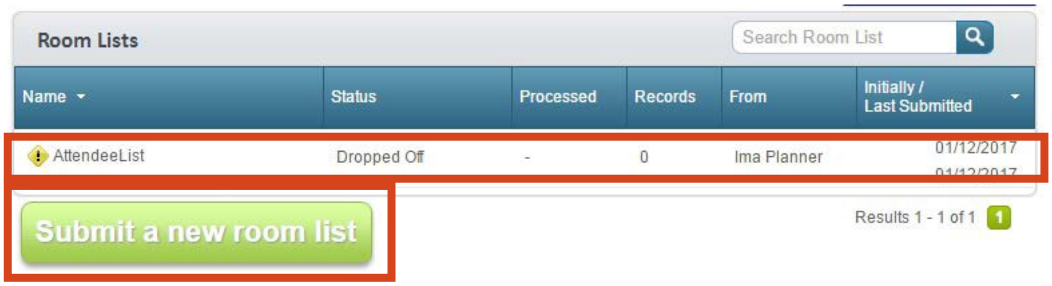


Submit a Room List (cont.)

Upon successful submission you will be notified on the screen. If an error occurs, follow the instructions presented to correct the error and try again. Successful submission will trigger an email to be sent to the hotel or event organizer informing them that a list has been uploaded and is ready to be processed into reservations. Click the “Go back to my room lists” button to return to the listing of room list files.



The list will include all room lists currently dropped off, processed and/or partially processed. Submit another list by clicking on the “Submit a new list” button.



IMPORTANT ROOM LIST NOTES

- Room lists must be in Excel or CSV file format. Any version of Excel is acceptable.
- While a specific template is not required, if your hotel or event organizer has provided you with a mapping template we strongly recommend you use it for your list.
- Do not include the following characters in your header row:
  - Apostrophe (‘)
  - Quotation marks (“)
  - Forward slash (/)
  - Backwards slash (\)
  - Vertical slash (|)

If you try to upload a list with the above characters in the header, you will receive an error notice that asks you to check your header row and remove the characters.

NOTE: These restrictions only apply to the Header Row and NOT to the reservations themselves.

Submit a Room List (cont.)

4. Each new row below the identified header row will be considered a new reservation. Roommates/Shares MUST be included on the same row as the primary guest (Guest 1).

5. Room List submissions are for **NEW RESERVATIONS ONLY**. When updates are necessary you may make them via Multiple Room Booking Tool (MRB). Please only submit lists with new reservations to avoid duplicates.

6. Minimum requirements for making a reservation via a rooming list vary from hotel to hotel, but the absolute minimum is:

    i. First Name
    ii. Last Name
    iii. Check In Date
    iv. Check Out Date
    v. Payment Information (either Credit Card or "other")

    Optional information includes
    vi. Attendee Type
    vii. Room Type
    viii. Special Requests (these are only requests and cannot be guaranteed)
    ix. Email Address

NOTE: Please check with your hotel or event organizer for the required information necessary to make a reservation. The more required information you provide, the quicker your list can be processed

NOTE FOR CITYWIDE EVENTS: Event planners that are participating in a Passkey enabled City-Wide event will only see the Room List option if the event organizer has this feature enabled.

NOTE: If you provide email addresses in your rooming list(s) the hotel or event organizer can send individual confirmation emails to your Attendees, as well as contact them with event specific information via the built in Campaigns tool or even on your behalf when necessary with a Quick Notify email…even during your event!

MRB – Multiple Room Booking Tool

Managing Reservations with MRB – If enabled by your hotel or event organizer, the Multiple Room Booking Tool allows you to manage every reservation for your event from one location, 24/7, from any computer that is connected to the internet. You may make a single reservation, bulk reservations that include the same data (i.e. same check-in and/or check-out date or payment details), update and cancel reservations.

Your hotel or event organizer will have set up your event with certain Attendee Types and associated those attendee types with a particular room type or types along with guarantee types (payment type).

If the attendee type you are trying to make a reservation(s) for was set up to require a credit card to make a reservation, you will need the credit card information to make a new reservation.

- If the attendee type you are making a reservation(s) for was set up to have their accommodations guaranteed to a master account, then you will not need a credit card or provide any payment details to make the reservation.
- You will not be able to change the payment type or available room types for the attendee type you are making a reservation for.
- You will only be able to make as many reservations as your block currently has availability.

*Minimum data required to make a reservations is:

a. First Name
b. Last Name
c. Check In Date
d. Check Out Date
e. Attendee Type
f. Room Type (choices automatically selected for you when you select an attendee type)
g. Payment Type (automatically selected for you when you select an attendee type)

***NOTE**: Minimum data requirements change from hotel to hotel.

NOTE: Please check with your hotel or event organizer for the exact minimum data required to make a reservation.

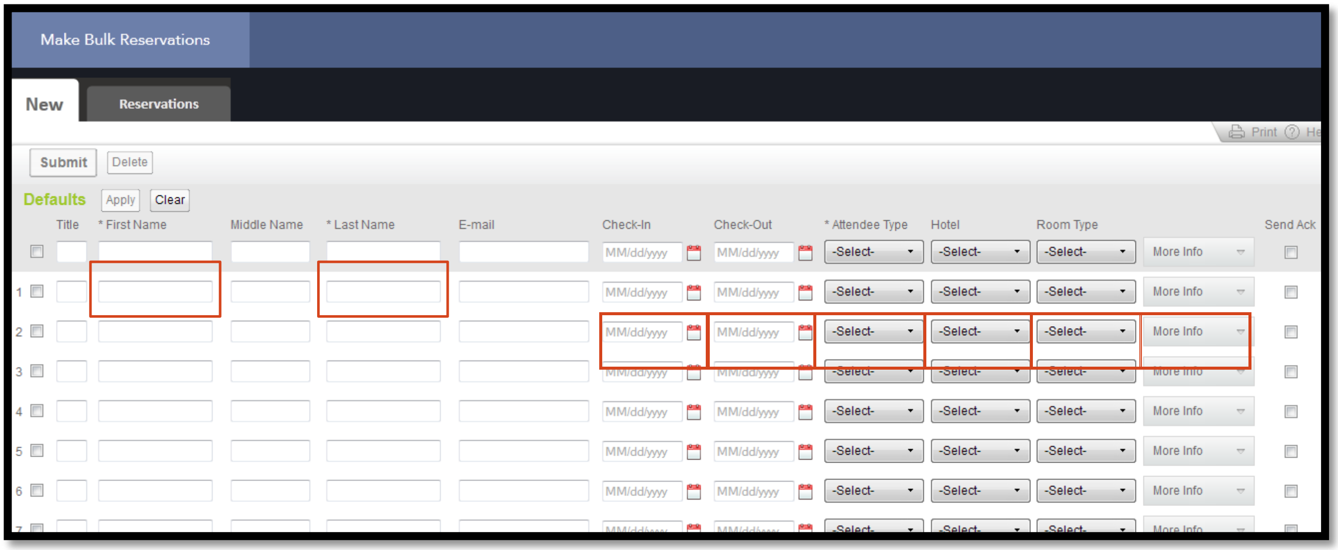
MRB – Making a single reservation

Making a single reservation – To make a single reservation, access the MRB and select the NEW tab. Enter the data in row one (1) and NOT the top gray area. The top gray area will be used to make multiple reservations with the same data (i.e. same check-in/check-out dates, Attendee Types, etc.)

1. Enter the Attendee First Name
2. Enter the Attendee Last Name
3. Enter the Check-in Date
4. Enter the Check-out Date
5. Select the appropriate Attendee Type from the Attendee Type drop down menu.
6. Select the Hotel from the Hotel drop down menu.

   NOTE: The hotel will be automatically selected for you for single hotel events.
7. Select the Room Type for this reservation from the Room Type drop down menu.

   NOTE: Available room types are associated with the Attendee Type and Hotel. Only room types available for the Attendee type and hotel you selected will be available. If only one room type is associated with the selected attendee type and hotel, the room type will be selected for you.
8. Click on More Info and select Billing Information to continue.

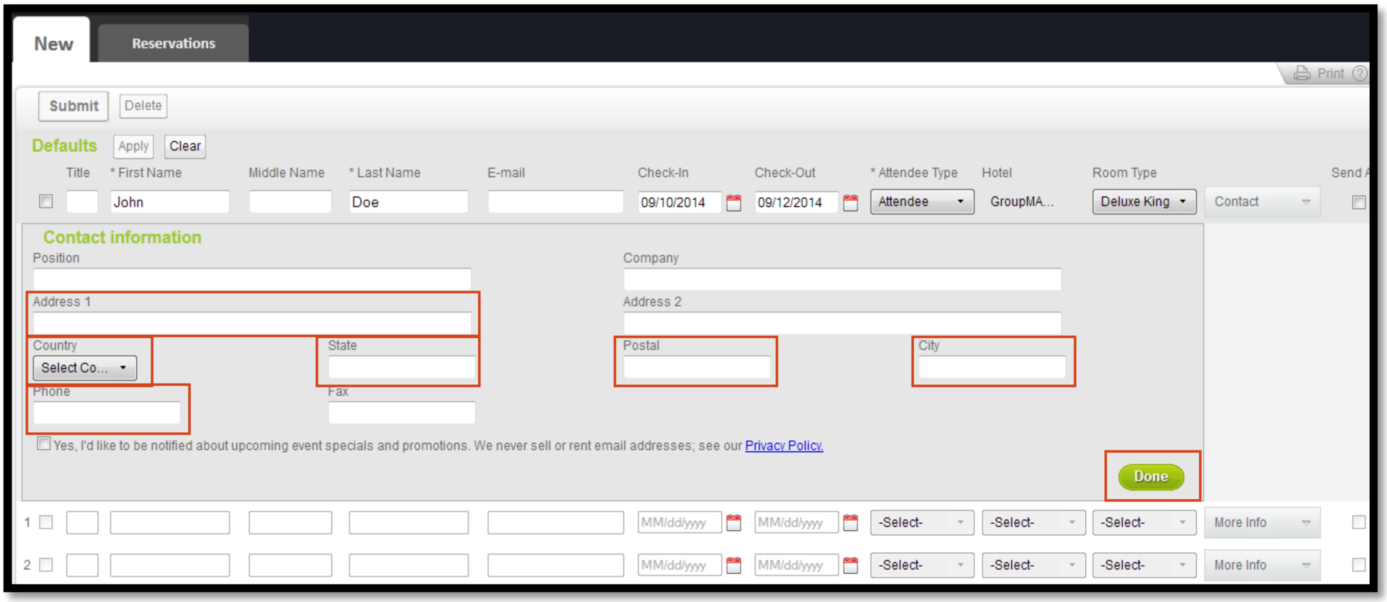


9. Enter Billing information.

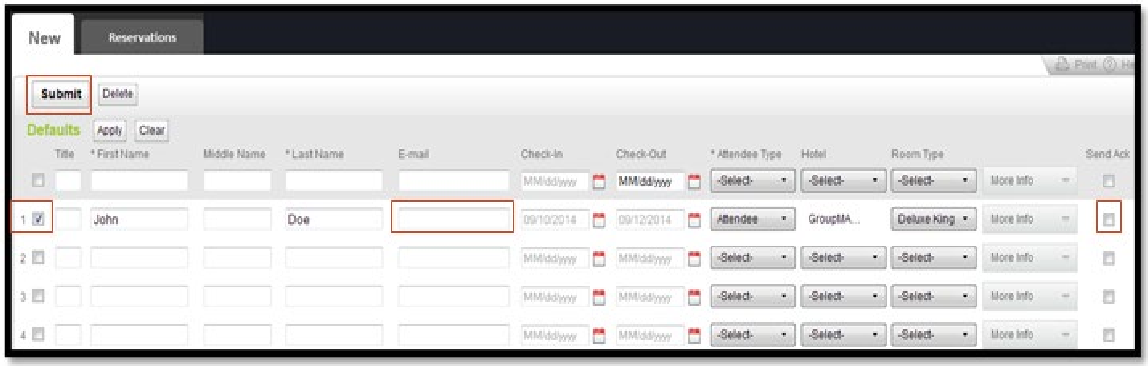
   NOTE: Available Guarantee Type (Payment Type) will be automatically selected for you based on the Attendee Type and Hotel selected for this reservation and may not be altered.

If Credit Card is the payment type, enter the **card type, number, and expiration date**. If a non credit card guarantee is displayed (Other Payment), there is nothing you need to provide in the Payment Screen. Click the green Done Button to continue.

10. Depending on the hotel's requirements, you MAY need to provide a complete address to make the reservation. To enter an address, click More Info then Contact Information
11. Enter the Guest's Street Address, Country, State, Postal Code and City. Enter a phone number in the Phone field if required.
12. Click the green Done button to continue.



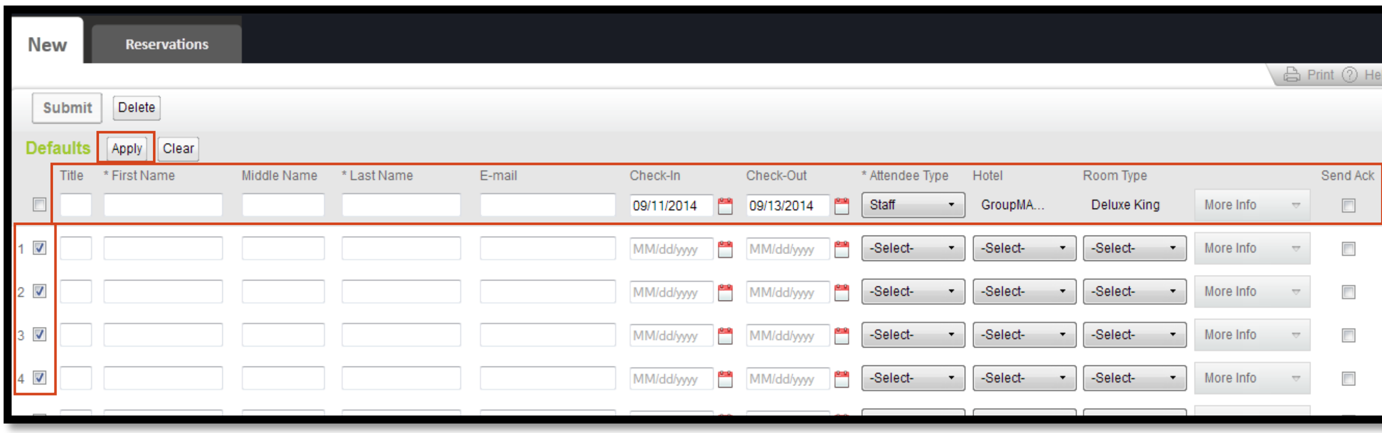
13. You may enter an email address AND tick the box under Send Ack to send an email confirmation to the guest. To complete the reservation, tick the check box next to the reservation you want to process and click the Submit button. Submission details will be displayed in a pop-up. Click OK to continue. You will be taken to the Reservations Tab of the MRB to review the reservation.



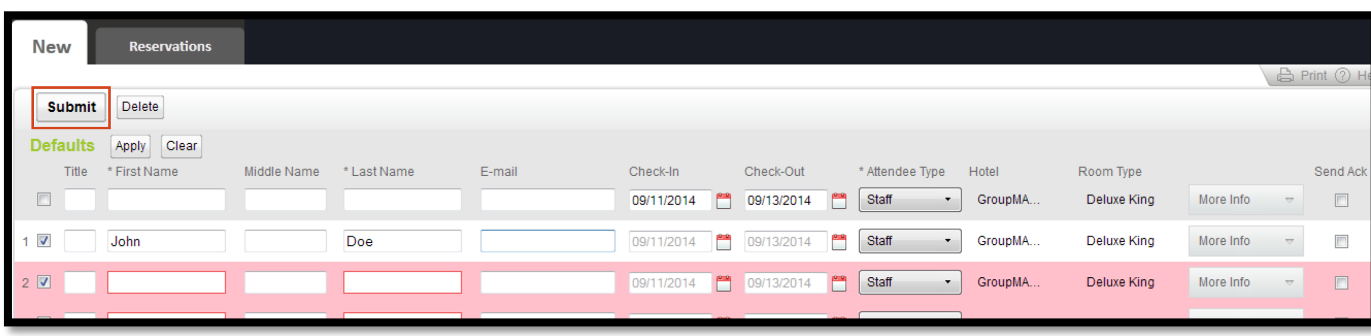
MRB – Making Multiple Reservations

Making Bulk Reservation – To make multiple reservations at one time, enter the data that is the same for all reservations in the gray area at the very top of the MRB.

a) Enter any data that will be exactly the same for all reservations you wish to make. This could be everything except the name of the attendee.
b) Tick the check box(es) next to the number of reservations you wish to make (i.e. tick boxes by 1, 2, 3 and 4 to make four reservations).
c) Click the Apply Button to auto fill information into the reservation number(s) that you selected



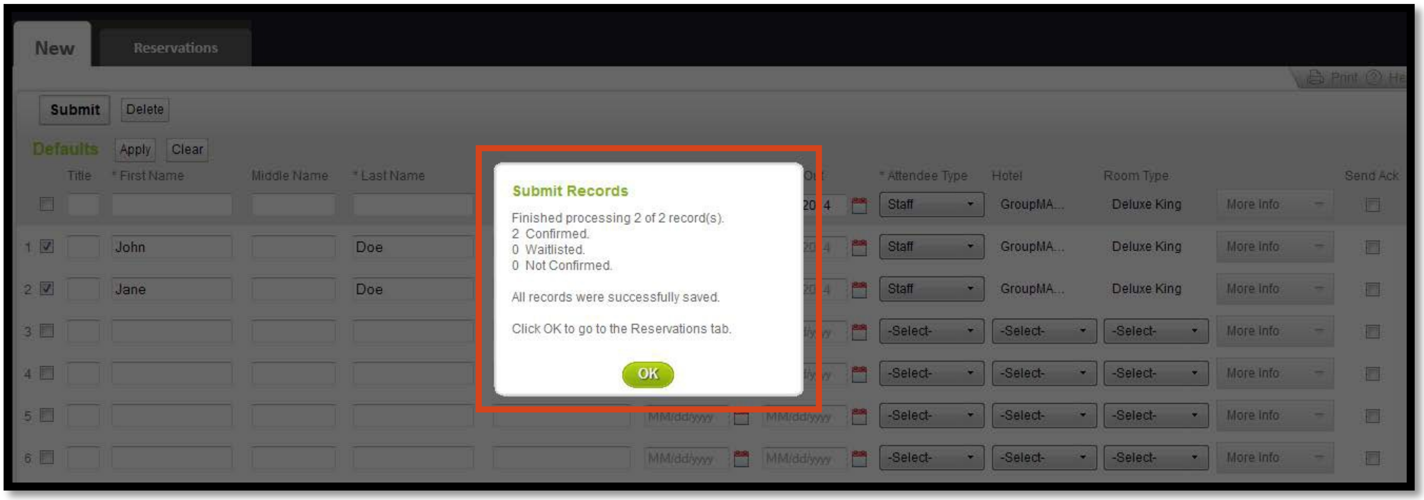
d) Reservations that still require data for successful submission will appear with red highlighting. Enter the remainder of the required data. Once the required data has been entered the red highlighting will turn to white. Click the Submit button to complete the reservations that you have selected.



MRB – Making Multiple Reservations (cont.)

e) You may send Acknowledgement (confirmation) emails to the guests you are making reservations for if you provide an email address AND tick the Send Ack check box to the far right of EACH reservation you wish to send the email to.

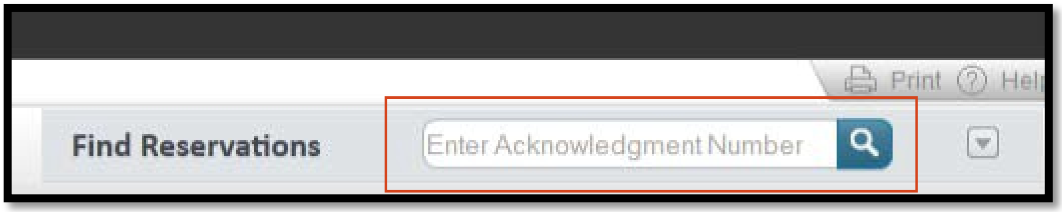
f) Submission details will appear in a pop-up. Click OK to continue. You will be taken to the Reservations tab to review your reservation(s).



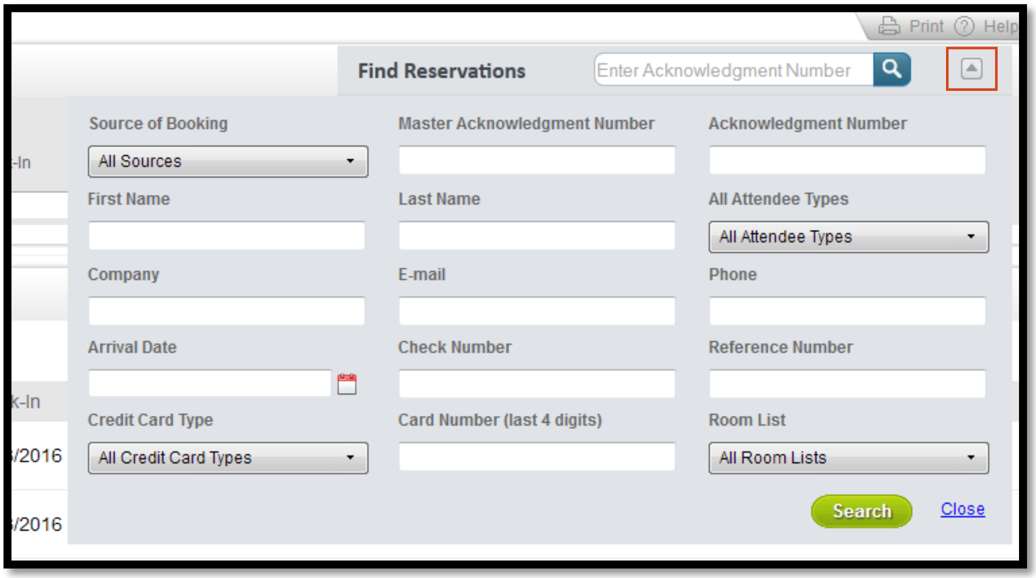
MRB – Updating Reservations

Making changes to a reservation – You may make changes to and/or cancel any reservation in your event via the Reservations tab of the MRB.

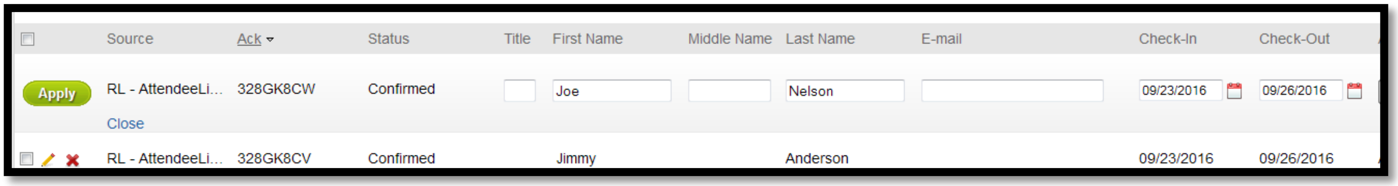
- Search for a reservation by the Acknowledgement or confirmation number via the search box to the far right of the page.



- Click on the down arrow to the right of the search box for more search term options.

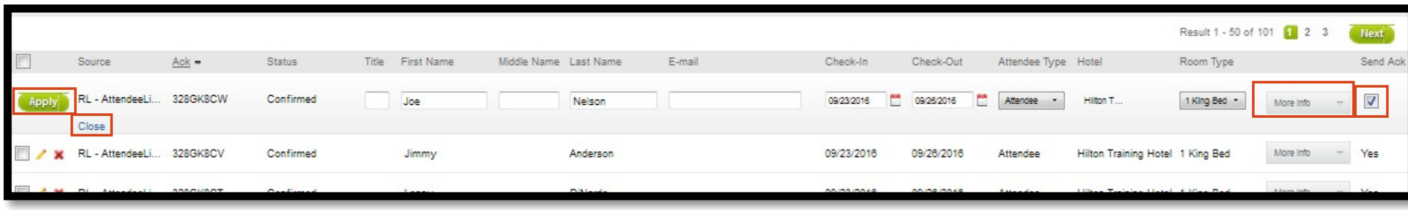


- Click on the pencil icon next to the reservation you wish to update. The data fields will open to allow editing.

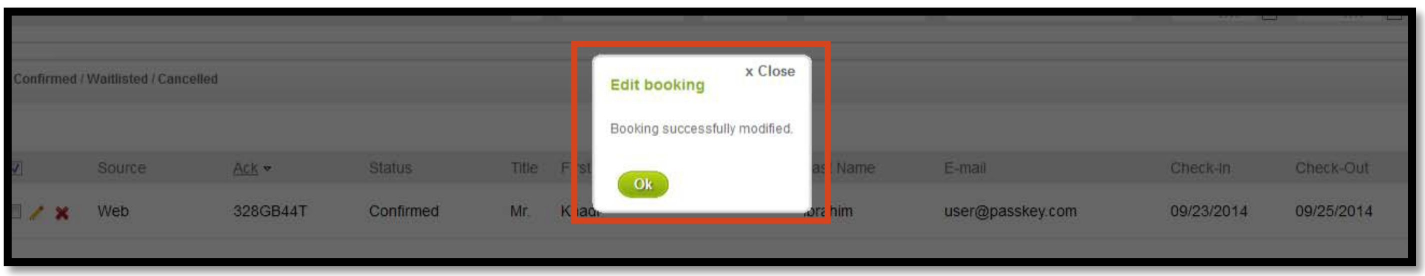


MRB – Updating Reservations (cont.)

- Click on More Info to view other data fields that can be modified.
- Make sure the Send Ack box is un-ticked if you DO NOT wish to send this attendee a reservation modification email. The box should be ticked if you DO wish to send a reservations modification email.
- Click the Apply button to save and submit your changes. Click the Close link to cancel your changes and leave the reservations un-changed.



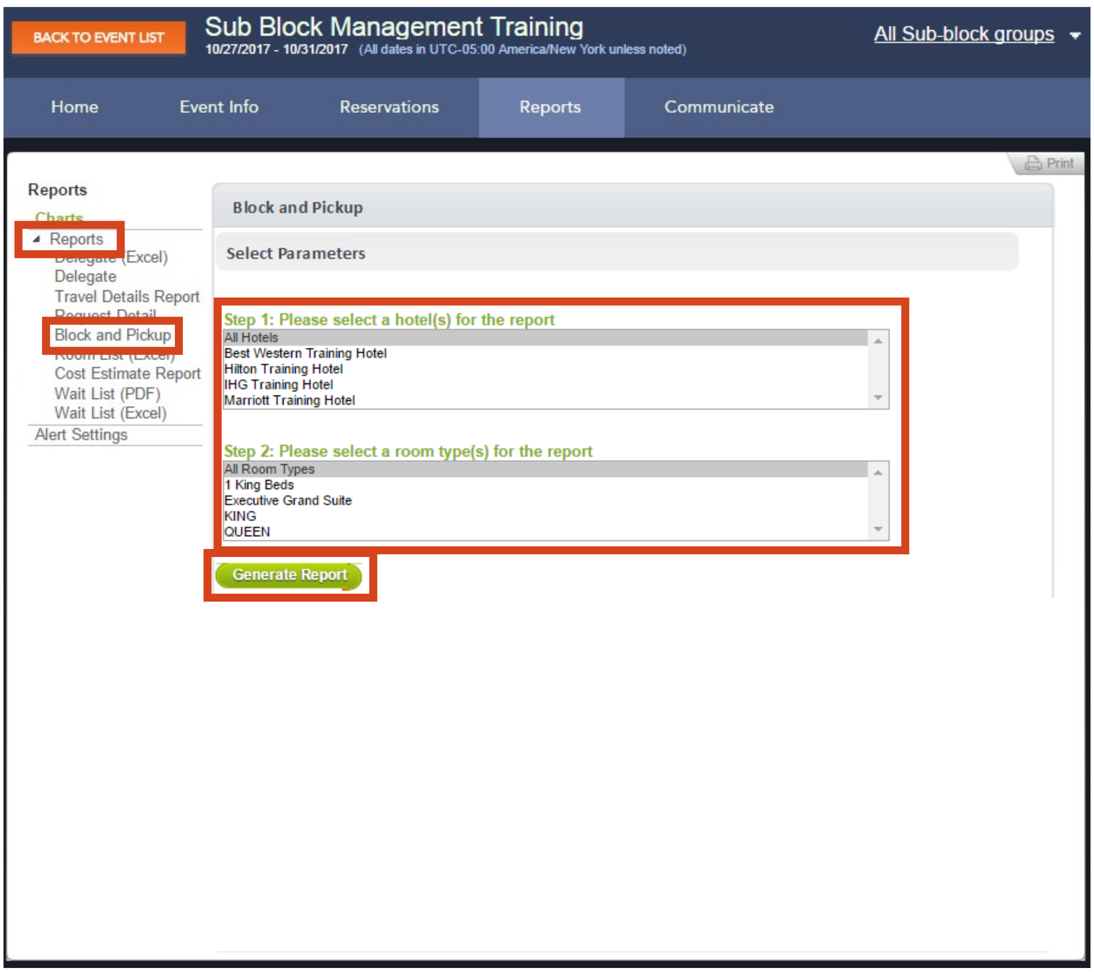
- Submission details will appear in a pop-up. Click OK to continue.



Running Reports

Reports that have been enabled by the hotel or event organizer will be displayed in the left menu on the Reports Tab.

1. Click on Reports in the left menu to display available reports.
2. Click the name of a report to begin the process of running the report. This will display any parameters that may be selected for a particular report.
3. Select parameters as desired
4. Click the “Generate Report” button.
5. Reports that have (Excel) at the end of the report name will run in Excel. Users will be prompted per browser settings to either open or save the report.
6. Reports that do not have Excel at the end of the report name will run in the browser. Reports that run in a browser can be exported in multiple formats by clicking on the export icon at the top of the report.



Export icon for reports run in the browser

Working with Alerts

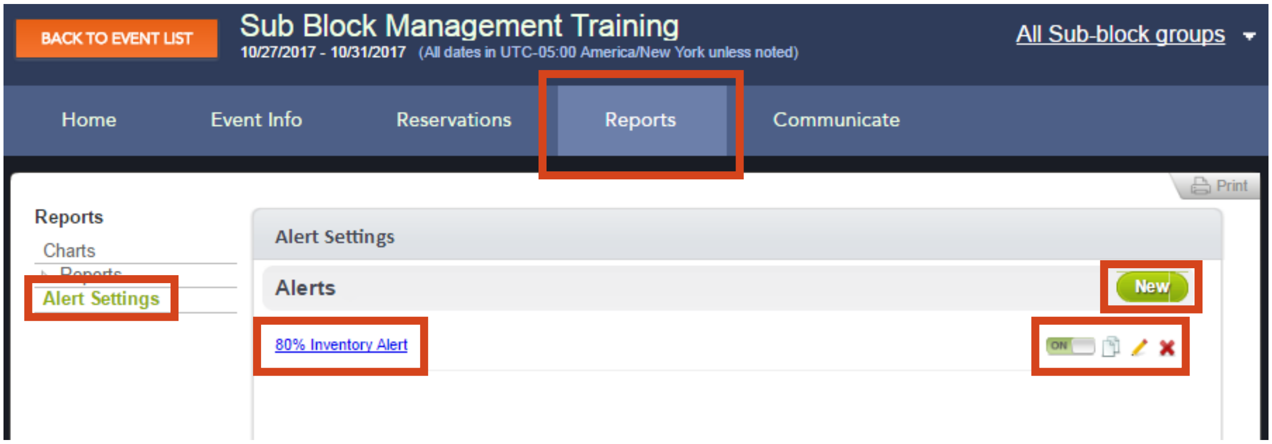
The alerts section of the Reports Tab allows planners to edit settings on any Inventory Alerts (one of the SmartAlerts in the system) that have been set up by the hotel or event organizer as well as allowing planners to create their own inventory alerts.

NOTE: The hotel or event organizer may have created and enabled other SmartAlerts that do not display on the dashboard. Contact your hotel or event organizer for information on any other alerts or updates that you receive or would like to receive. Other alerts include:

- Block and Pickup Report
- Delegate Report
- Cutoff Reminders
- Event Summary
- Post Event Review Reminder
- Event Report Card
- Reservation Update
- Reservation Arrival Alert

The formatting of the alert cannot be customized.

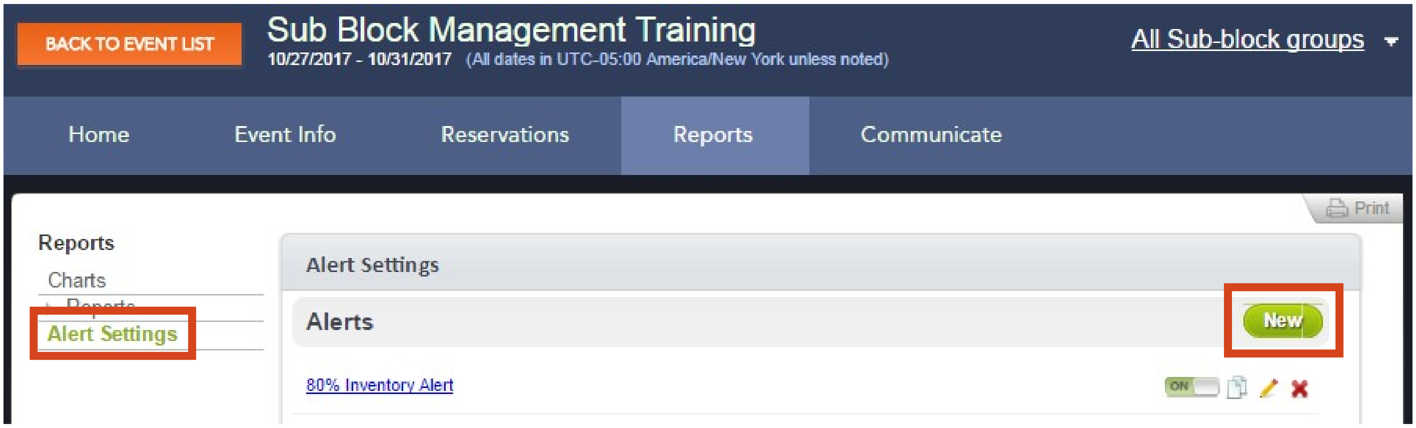
1. Click on Alerts Settings in the left menu to view any inventory alerts that have been enabled by the hotel or event organizer. Click the “New” button to create a new inventory alert.
2. The alert must be turned on to be sent. Click an “Off” switch to turn it on to enable the alert to be sent. Click an “On” switch to turn it off and stop the alert from being sent.
3. Click the two pieces of paper icon to copy an alert.
4. Click the pencil icon to edit the settings for an alert
5. Click the “X” icon to delete an alert.
6. Click the name of an alert to view a formatting only example of what the alert will look like when sent.



Working with Alerts (Cont.)

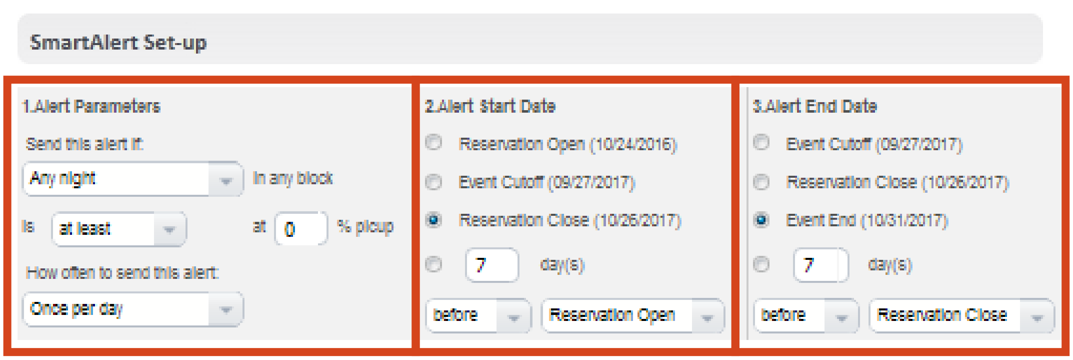
Creating a new Inventory Alert

1. From the Reports Tab, click on Alert Settings
2. In the listing of alerts to the right, click on the “New” button



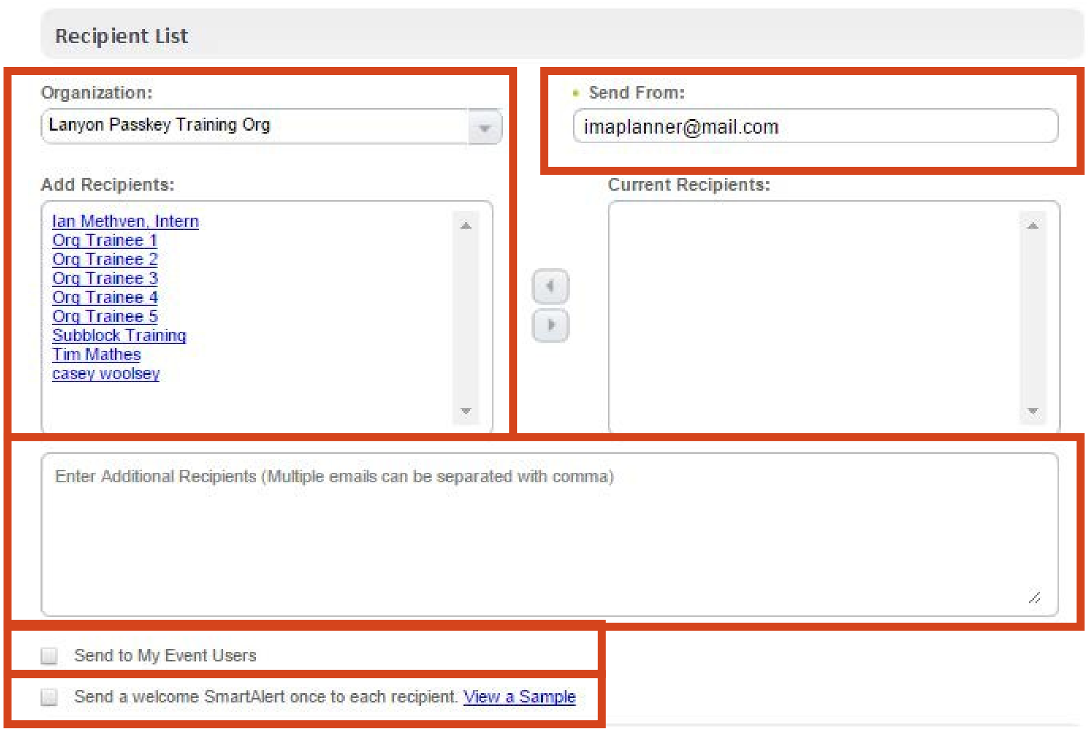
3. Enter a name for the Alert in the Alert Name field
4. Make sure Inventory Rule is selected in the Alert Type field
5. Click the View a Sample” link to view a generic sample of the alert format

6. Under SmartAlert Set-up, set the desired parameters in section 1 through 3
   I. Section 1: Set the parameter of when this alert should be sent
   II. Section 2: Set the start date of this alert
   III. Section 3: Set the End date of this alert

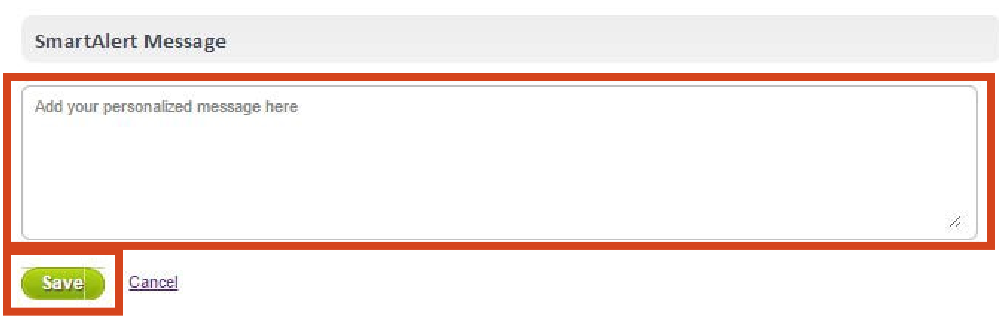


Working with Alerts (Cont.)

7. In the Recipient List section, the Organization and Add Recipients sections will display the hotel(s) and/or event organizer users. Do not select anything from this section without the permission of the hotel(s) or event organizer.
8. Your email address will be included in the Send From field. This is the address that will receive any “reply to” emails from the address set to receive this address.
9. Enter the email address that you want this alert to be sent to in the “Enter Additional Recipients (Multiple emails can be separated with a coma)” field. Enter your email address here if you want this alert to be sent to yourself.
10. Leave the Send to My Event Users untick. This is a setting that will send the alert to the hotel or event organizer users associated with the event.
11. If you would like to send a welcome email to the recipient letting them know that they will start to receive this alert once the parameter settings have been met, tick the checkbox to the left of “Send a welcome SmartAlert once to each recipient”



12. You can enter a personalized message that will appear at the top of the alert in the SmartAlert Message text area. This message will appear at the top of the alert.
13. Click the “Save” button to save your work.

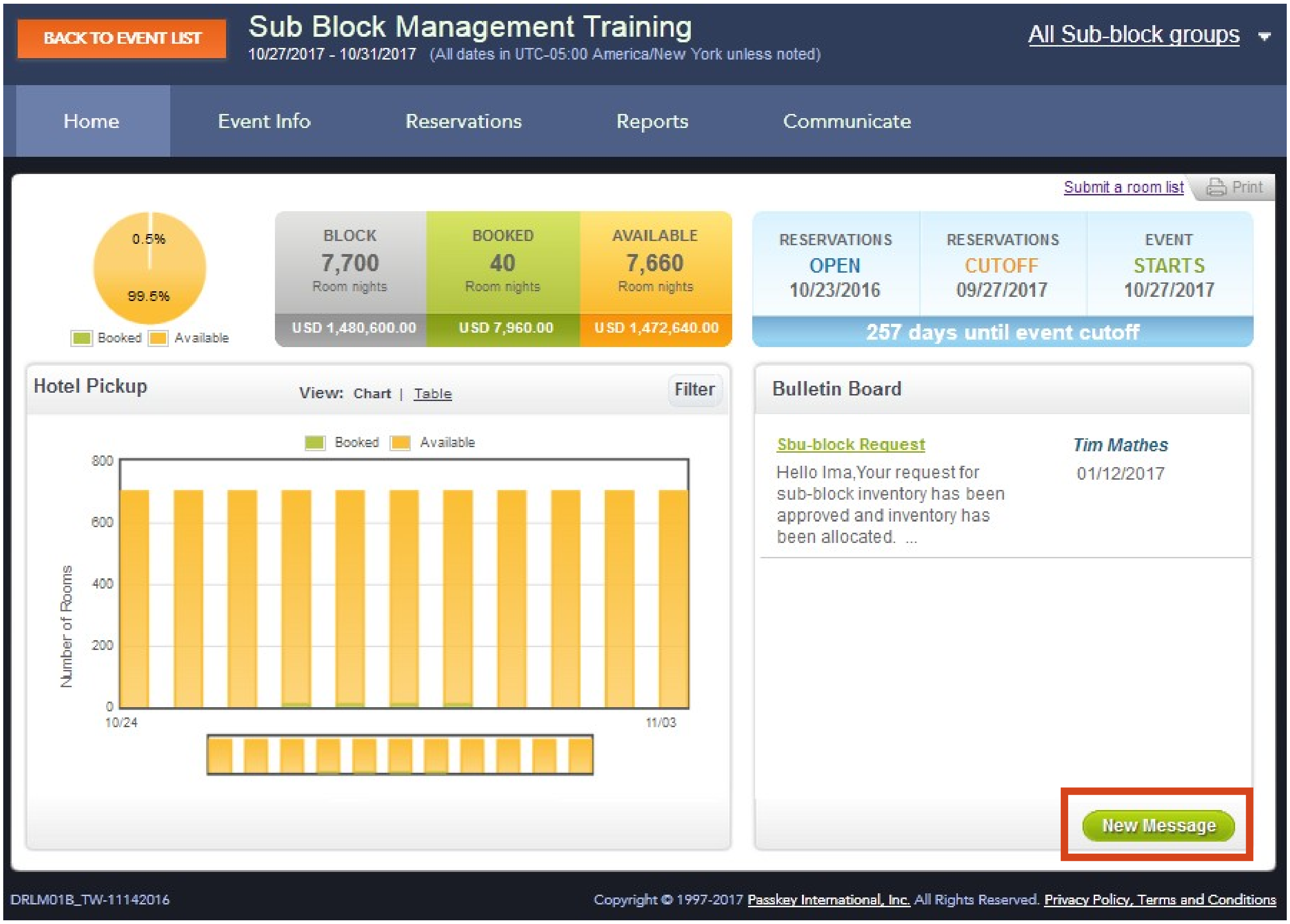


Using the Bulletin Board

The Bulletin Board is available on the dashboard Home Tab as well as the Communicate Tab. This tool can be used by hotels and event organizers to post messages to any planner in the event, including sub-block planners, as well as by planners to contact other planners in the event. The message will be posted on the dashboard bulletin board and is viewable by the appropriate user. Once posted, an email will be sent to the message recipient(s), the person posting the message as well as any internal contacts for the event as set up by the hotel or event organizer. The email will have a link to the portal where the user can log in and view the message(s) as needed.

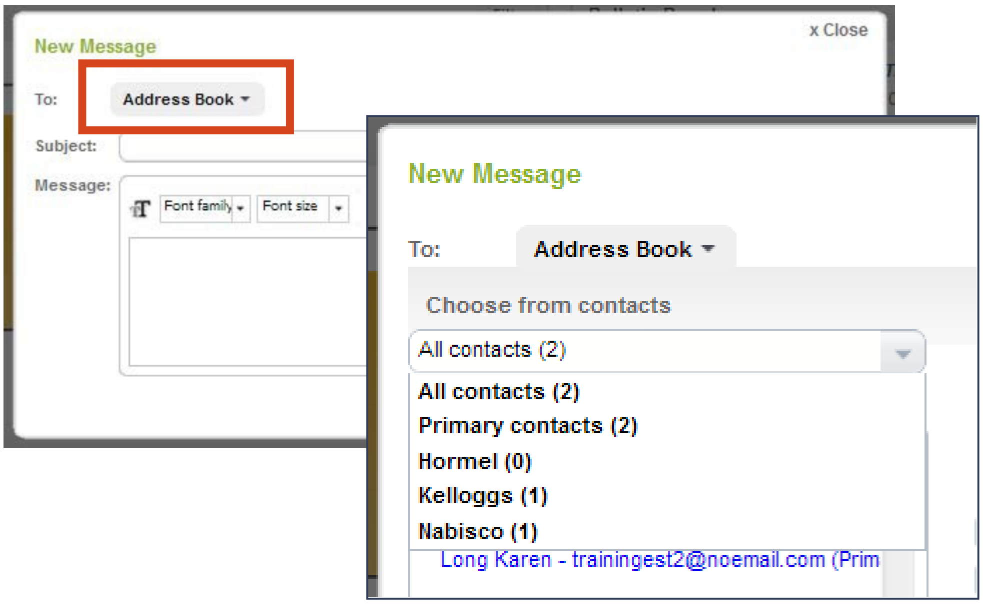
Posting a message for another planner from the Home Tab – The Bulletin Board can be accessed from the Home Tab or the Communicate Tab. To send a message to another planner in the event from the Home Tab:

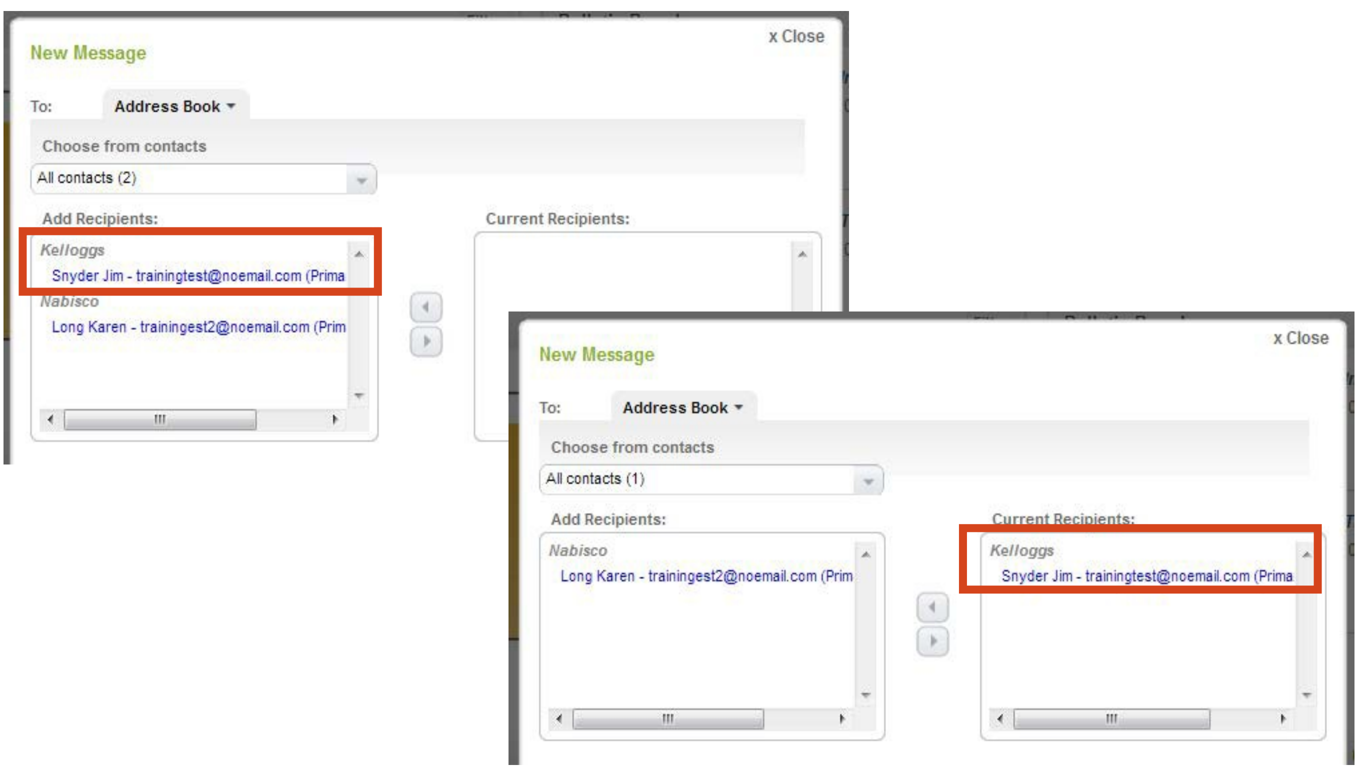
1. From the Home Tab, click on the “New Message” button.



Using the Bulletin Board (Cont.)

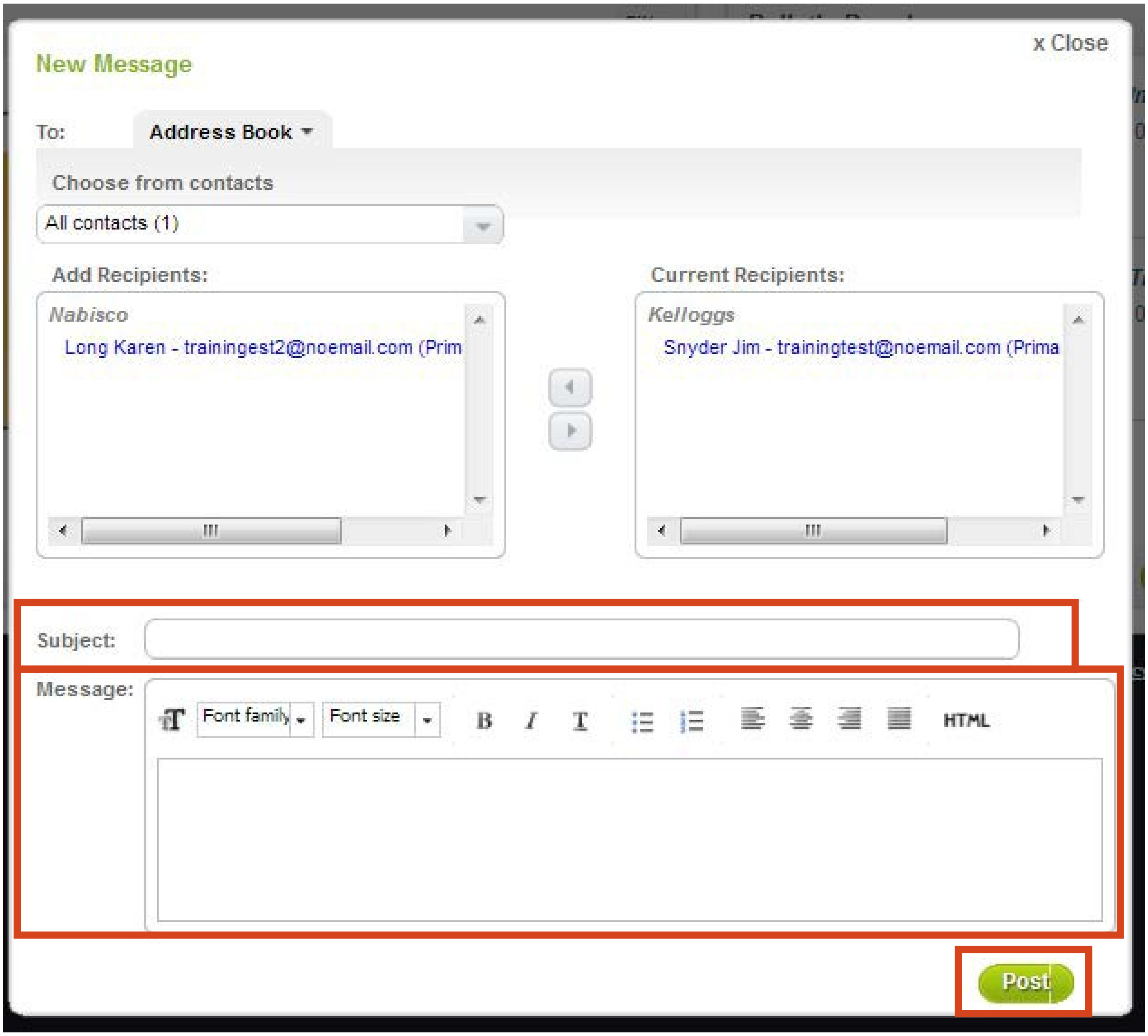
2. Click on the Address Book drop down to select a recipient(s).
3. Select a contact to post/send the message to. You can send to all Planners, the primary contact of a sub-block group if there is more than one planner for that group, or any other planner(s) in the event.
4. Click on the planner's name/contact info to in the Add Recipients box to send them to the Current Recipients box. Click on a name/contact info in the Current Recipients box to remove them from receiving this message.





Using the Bulletin Board (Cont.)

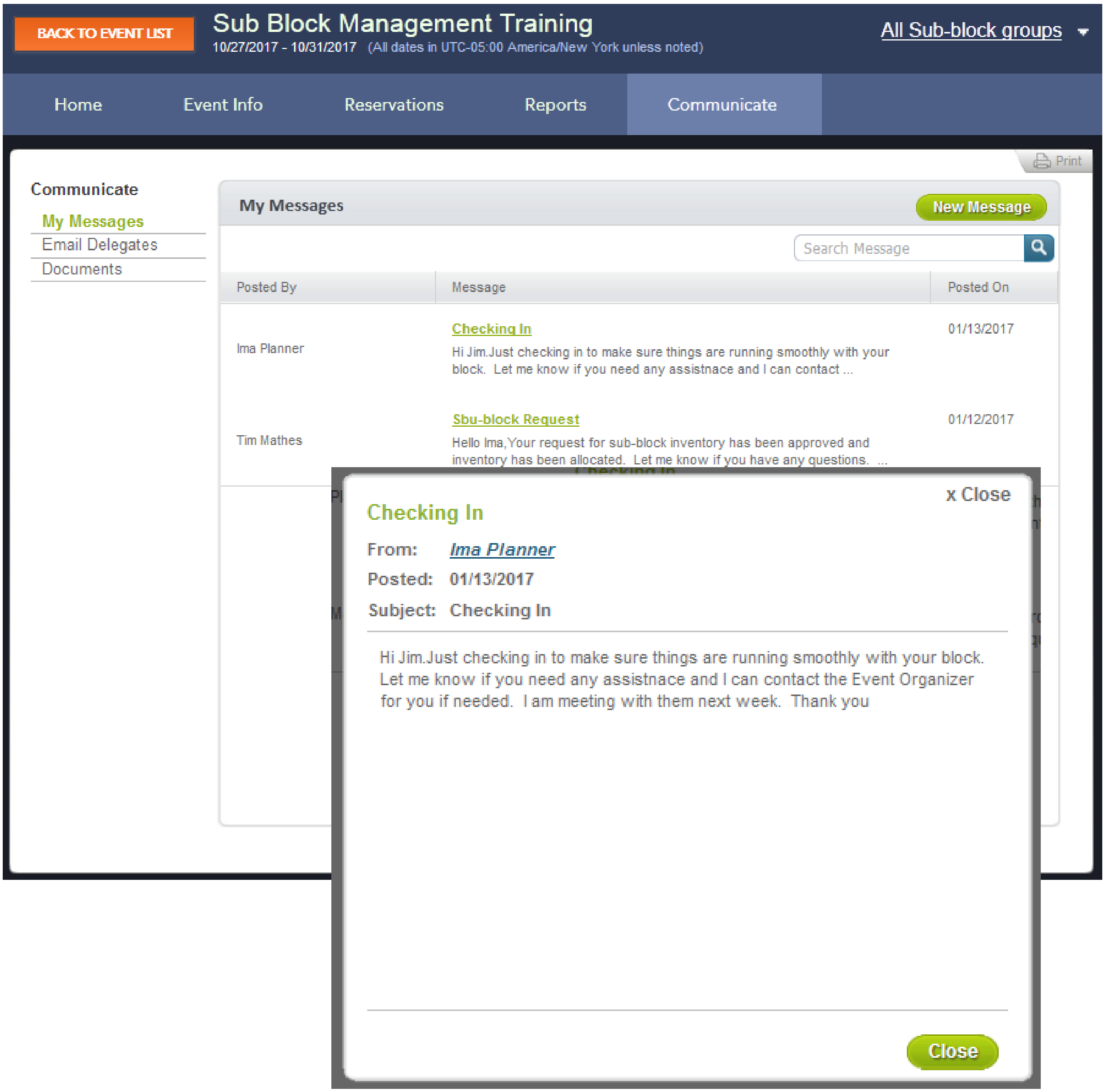
5. Enter a subject for your message in the Subject text box.
6. Enter your message in the text area. You can highlight text and format it just as you can in any word processor.
7. Click the “Post” button to submit your message. This will trigger an email with the message to be sent to the recipient, the sender and the hotel or event organizer internal contact for the event.



Using the Bulletin Board (Cont.)

You can also read/post messages from the Communicate Tab. Posting a message from the Communicate Tab is exactly the same as doing it from the Home Tab.

Reading your messages online – Click the subject of a message to read the entire message in a pop-up window. Click the "Close" button to close the pop up.



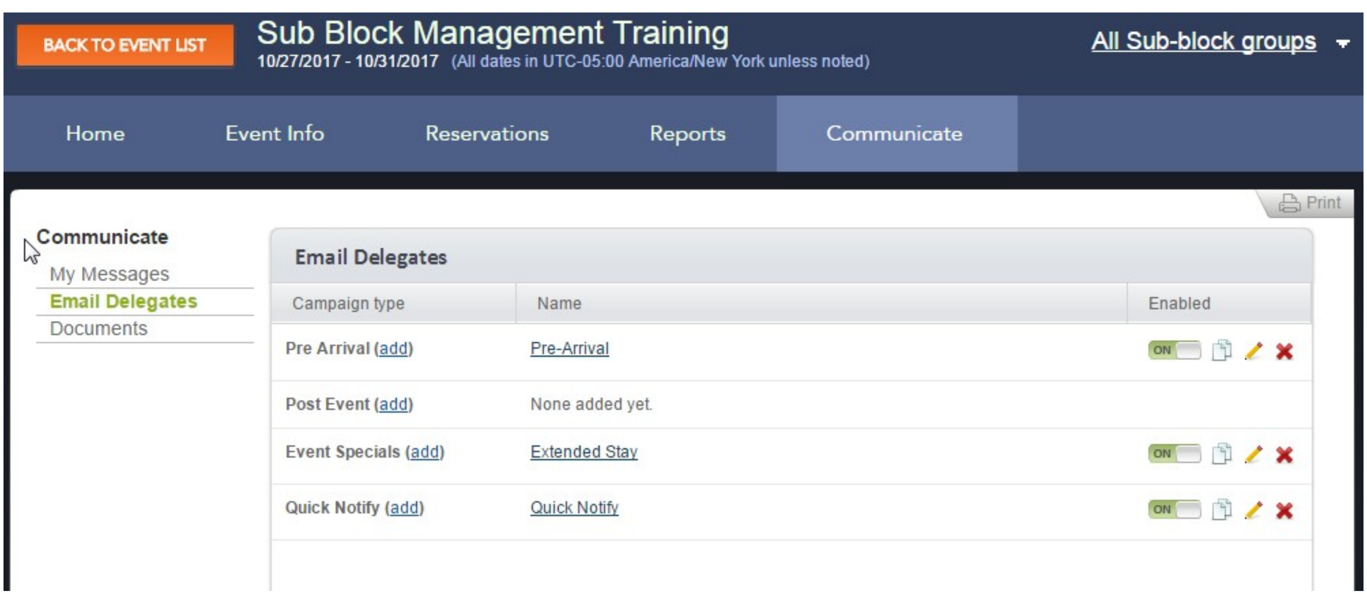
Emailing Delegates

If enabled by the hotel or event organizer, planners can send targeted email campaigns to event delegates that have made a hotel reservation pre, during and post event. (NOTE: reservations made by planners, hotel or event organizer must have had an email address provided to utilize the email campaign tool. Attendees that make a reservation via the attendee website must provide an email address to complete the reservation process)

1. From the Communicate Tab, click on Email delegates. Any campaigns that have been enabled by the hotel or event organizer for this particular event will be displayed in one of four categories:
   - Pre Arrival
   - Post Event
   - Event Specials
   - Quick Notify
2. If no specific email campaigns have been enabled in any or all of the categories, event planners can create new campaigns by clicking the “(add)” link available in each category
3. To copy a campaign and create a new one from the copy, click the two pieces of paper icon.
4. To modify a campaign’s content, layout, recipients and send date, click the pencil icon.
5. To delete a campaign, click the “X” icon.
6. Click an “Off” switch to turn a campaign on so that it will be sent per the campaign’s settings. Click an “On” switch to turn a campaign off so that it will not be sent.

NOTE: The hotel or event organizer can also edit all settings, delete and/or enable any and all campaigns that have been created either by the hotel/event organizer or by planners. Hotel and event organizers may have additional email campaign categories that do not appear in the dashboard Email Delegates section.

See Appendix A – Email Campaign Checklist for additional information on working with campaigns.



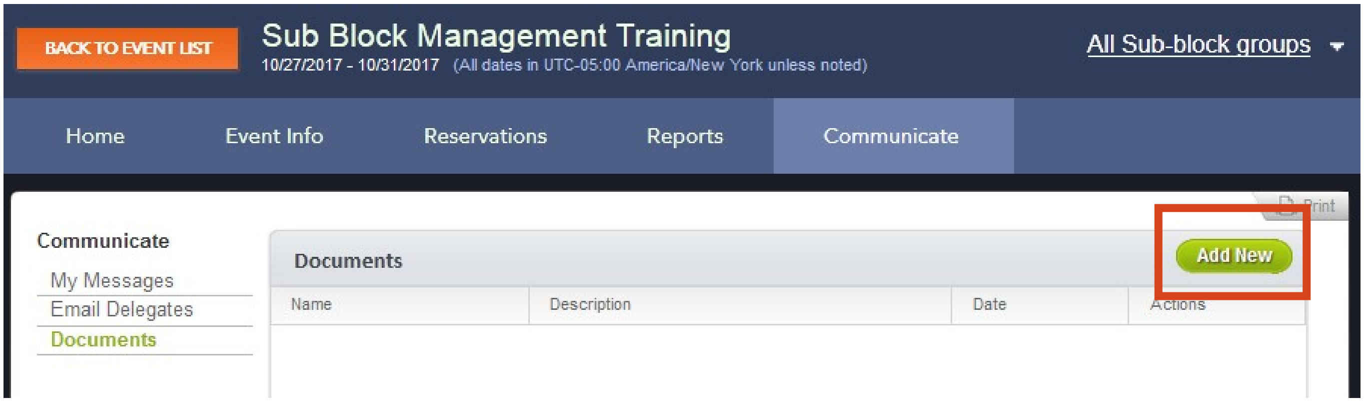
Working with Documents

If enabled by the hotel or event organizer, you can attach documents to the event dashboard for easy retrieval by planners and/or the hotel or event organizer.

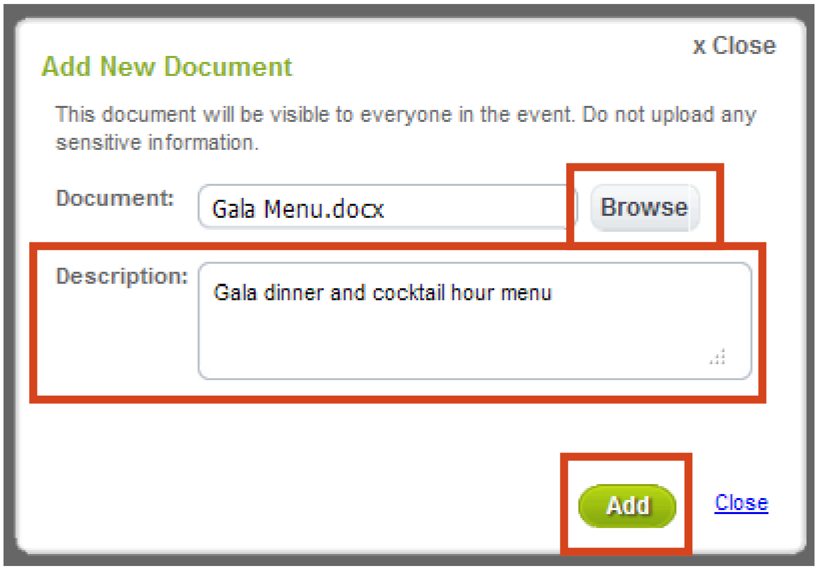
NOTE: Do not use the documents section to attach any document with sensitive data as all documents will be visible by all dashboard users for this event including all planners, sub-block planners and the Hotel or event organizer.

- Each document attached to the dashboard must have a unique name
- Documents must be less than 2MB (two megabytes) in size

1. To upload a document, from the Communicate Tab, click on the Documents link in the left menu.
2. Click on the "Add New" button.



3. Click on the "Browse" button to locate the file on your computer.
4. Enter a description of this document that will be displayed on the documents list.
5. Click the "Add" button.

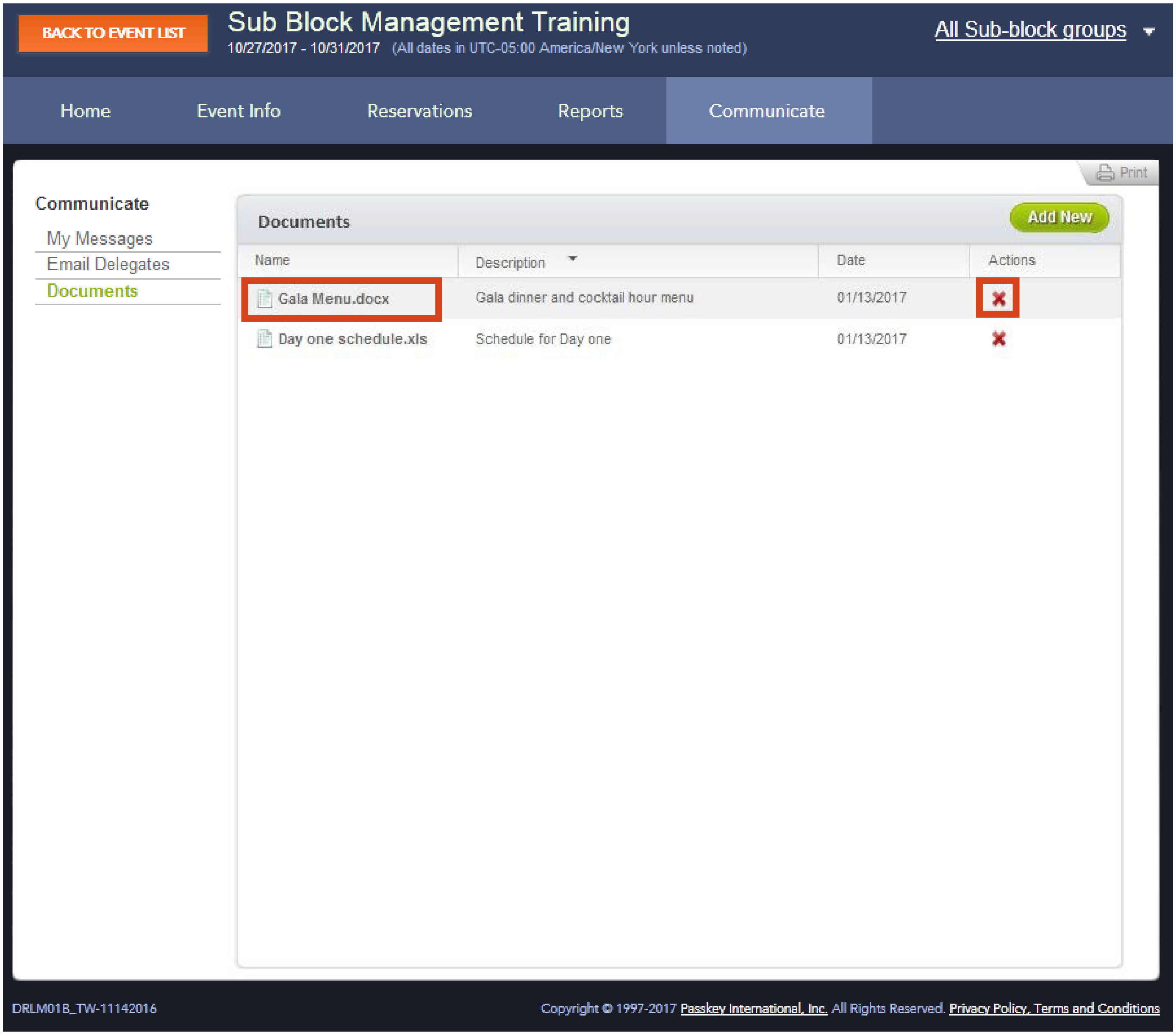


Working with Documents (Cont.)

Uploaded documents will appear in the Documents listing.

- Click on the name of a document to download that document.
- Click the “X” icon under the Actions column to delete the document.

  NOTE: Deleted documents cannot be recovered.
- Click on the column header to change the sort order of listed documents.



Appendix A – Email Campaigns Checklist

Modifying the "Send" date on the Campaign	
☐	Select the **Campaign** and click on edit icon
☐	Scroll to the **Timing** section of the Campaign
☐	Set the timing for the campaign: • X days in before/after key event dates • On a specific day chosen via the calendar
Note: The Campaign must also be turned on in order for it to go out.	
Modifying the "Recipients, Subject, and From Name" Fields	
☐	Scroll to the ***Recipients*** section (This will default to "All" unless changed) • Select the Attendee Type(s) and/or Room Type(s) ***Note: Some campaigns have additional options that may be selected.***
☐	Scroll to the ***Subject*** line in the **Layout** Section (this will be set to a default from the library setting) • Modify the Subject line
☐	Scroll to the ***From*** Section (this will be set to a default from the library setting) • Modify the From line
Best Practice: If the campaign is being sent on behalf of the meeting planner change the ***Send From*** to the Meeting Planner's name or organization.	
Inserting an Image/Logo into a Campaign	
☐	Scroll to the body of the campaign
☐	Place the cursor where you would like the image to appear
☐	Click the **Image** icon in the tool bar
☐	Select **Browse** and locate the saved image on your computer *(Hint: Image must be .jpeg, .png or .gif format and no more than 600 pixels wide)*
☐	Click the **Upload file** button
☐	Optional: Fill in the Image Description for any recipients whose email is not HTML enabled
☐	Click ***Insert***
☐	Scroll to the bottom of the page and select **Save**
Modifying Text within a Campaign	
☐	Scroll to the body of the campaign
☐	Select the area to edit the text
☐	Text can be copied and pasted or manually typed
☐	Scroll to the bottom of the page and select **Save**

Formatting Text within a Campaign	
☐	Scroll to the body of the campaign
☐	Use the tool bar above the Campaign text to format the message. Highlight the desired text and click the corresponding icon. ○ Change the font style or size:  ○ Bold, italicize, underline:  ○ Change the text color: 
☐	Scroll to the bottom of the page and select **Save**
Creating a Hyperlink	
☐	Scroll to the body of the campaign
☐	Highlight the text or click on an image to be hyperlinked
☐	Click the Insert/Edit Link icon: 
☐	Enter the URL
☐	Click **Insert**
☐	Scroll to the bottom of the page and select **Save**
Adding a Merge Field/Tag	
☐	Select the Tag Category and the tag from the Campaign tool bar: 
☐	Scroll to the body of the campaign
☐	Click the mouse where the new tag will be placed
☐	Click the **Select Tag** icon: 
☐	Scroll to the bottom of the page and select **Save**
Sending a Test Campaign	
☐	Scroll to the bottom of the campaign
☐	Select **Send Test Message**
☐	Enter your email and select **Send** **NOTE: DO NOT FORWARD A TEST EMAIL TO ACTUAL RECIEPIENTS AS THE DATA PULLED FOR MERGE FIELD/TAGS IS NOT ACTUAL DATA. TEST EMAILS ARE FOR FORMATTING VARIFICATION ONLY.**
Adding Campaigns to Events	
☐	Within the **Campaign** category name
☐	Select ***ADD***
☐	Edit settings and campaign information/contents
☐	Select **Save**
Note: The Campaign will now appear in the event and can be modified and customized by planners and/or the hotel/event organizer.	