

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](#)

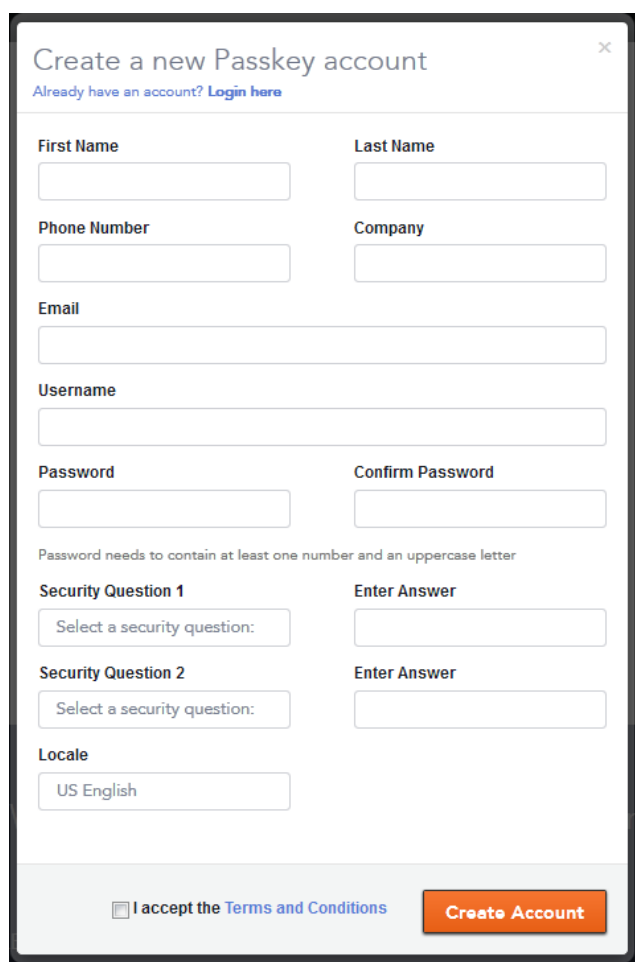
Thank you,
(Name of Hotel or Organization)

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

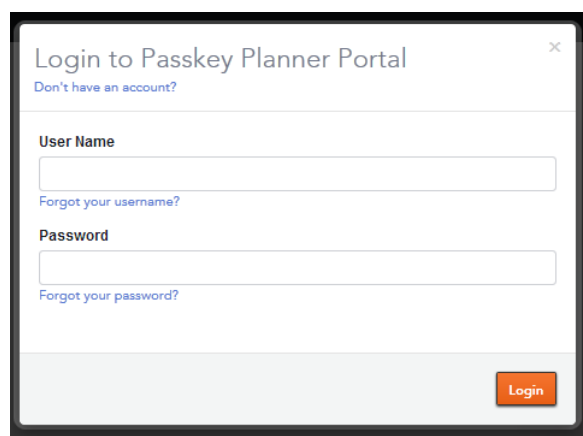
Creating an Account

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.



The screenshot shows a web form titled "Create a new Passkey account" with a close button (X) in the top right corner. Below the title is a link: "Already have an account? [Login here](#)". The form contains several input fields: "First Name", "Last Name", "Phone Number", "Company", "Email", "Username", "Password", and "Confirm Password". Below the password fields is a note: "Password needs to contain at least one number and an uppercase letter". There are two "Security Question" sections, each with a dropdown menu labeled "Select a security question:" and an "Enter Answer" text field. At the bottom, there is a "Locale" dropdown menu showing "US English". At the very bottom, there is a checkbox labeled "I accept the [Terms and Conditions](#)" and an orange "Create Account" button.



The screenshot shows a web form titled "Login to Passkey Planner Portal" with a close button (X) in the top right corner. Below the title is a link: "Don't have an account?". The form contains two input fields: "User Name" and "Password". Below the "User Name" field is a link: "Forgot your username?". Below the "Password" field is a link: "Forgot your password?". At the bottom right, there is an orange "Login" button.

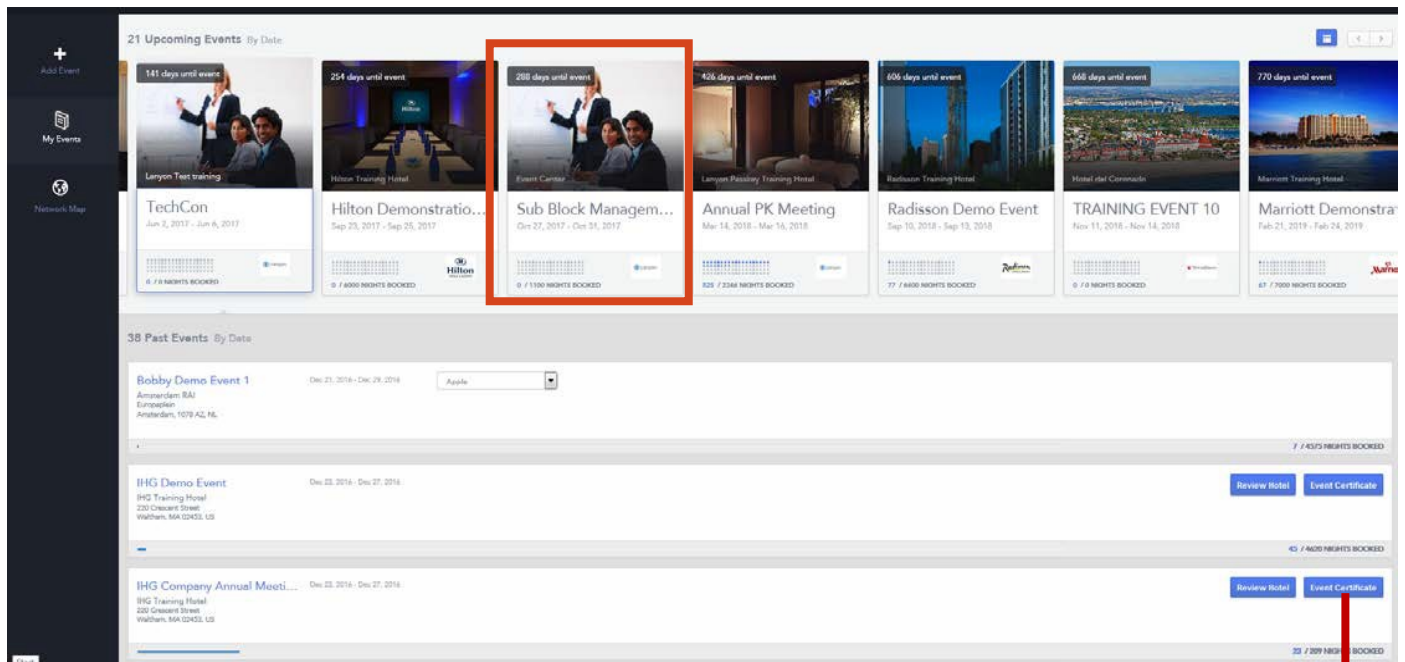
NOTE: Planners create their own accounts to access the Planner Portal and Event Dashboards. Hotels and Event Organizers do not have access to a planner’s login credentials. Contact Cvent Passkey Support for assistance with that.

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.

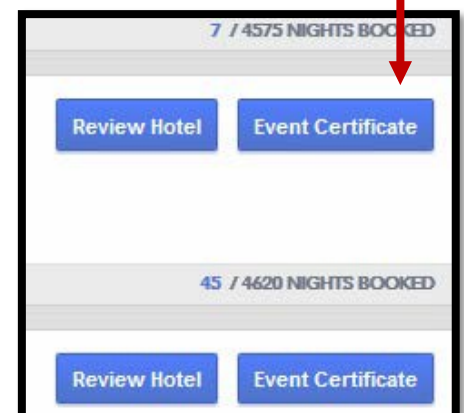
NOTE: Planners are associated to events via their email address. If you do not see your event on the portal home page, contact the hotel or event organizer and make sure they have added you as the planner to the event with the exact same email address that you used to create your Planner Portal account.

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). Click on 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.



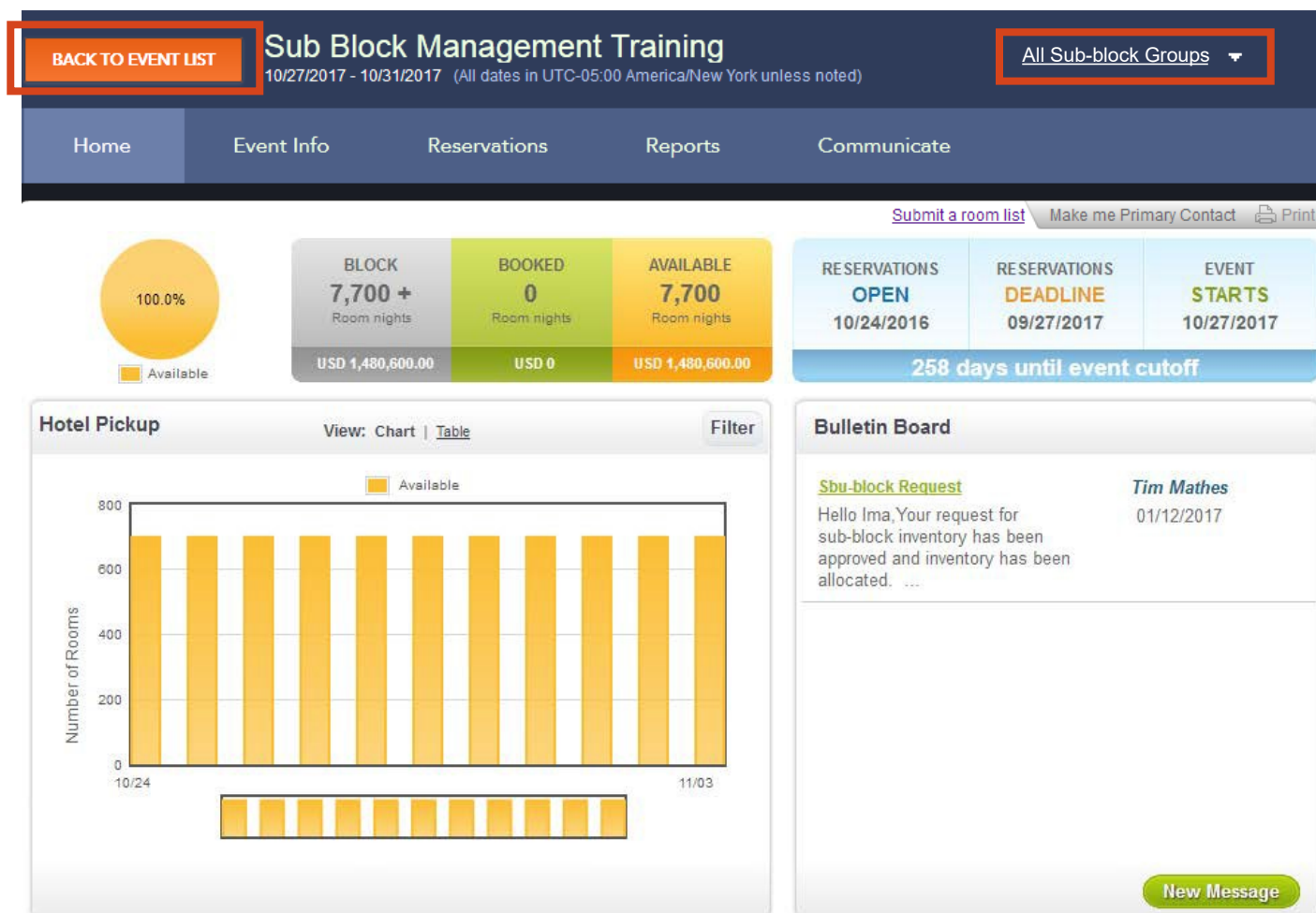
Home Tab

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.

[BACK TO EVENT LIST](#)

Sub Block Management Training

10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted)

All Sub-block Groups

[Home](#) [Event Info](#) [Reservations](#) [Reports](#) [Communicate](#)

Event Info

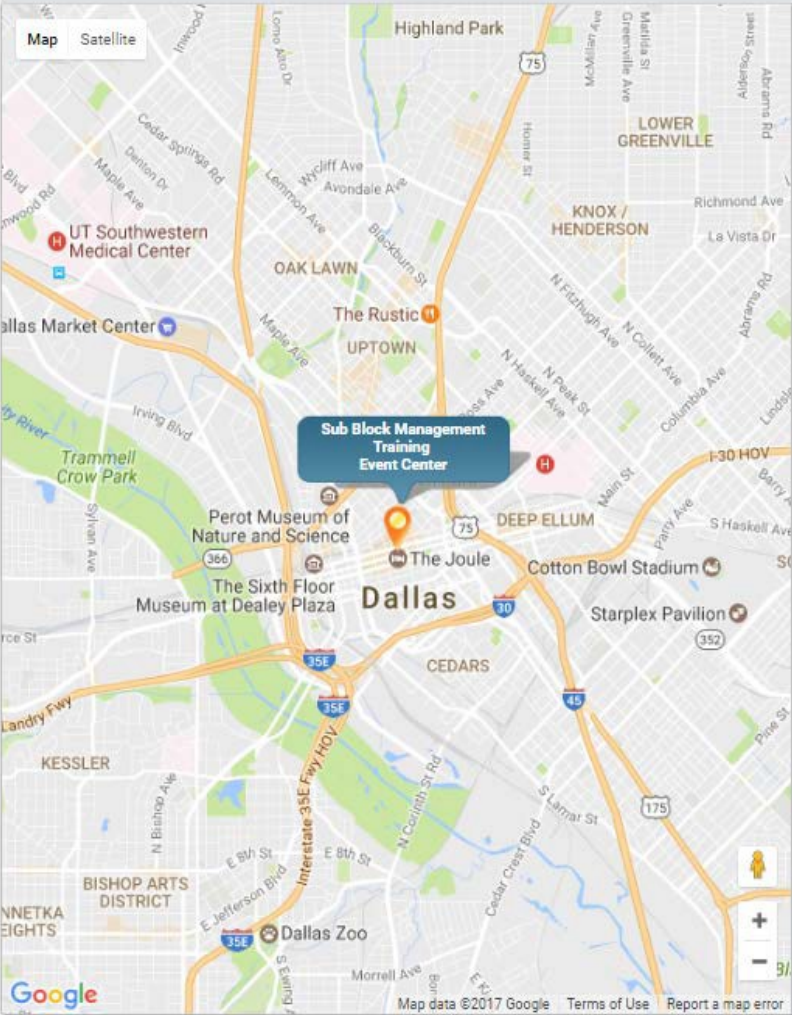
[Map](#)

[Cancellation Policies](#)

Event Info

Map

Satellite



Hotel Information

Click hotel to see it on map.

[Best Western](#)

717 North Harwood
Dallas, TX 75201
US

[Hilton Training Hotel](#)

17 East Monroe Street
Chicago, IL 60603
US

[IHG Training Hotel](#)

220 Crescent Street
Waltham, MA 02453
US

[Marriott Training](#)

3030 Holiday Drive
Fort Lauderdale, FL 33316
US

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.

[BACK TO EVENT LIST](#)

Sub Block Management Training

10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted)

[All Sub-block Groups](#)

Home

Event Info

Reservations

Reports

Communicate

Event Info

Map

Cancellation Policies

Cancellation Policies

Hilton Training Hotel - 1 King Beds - Hormel

Cancellations made within 48 hours of arrival will forfeit one night's room and tax.

IHG Training Hotel - Executive Grand Suite - Hormel

Reservation must be cancelled 24 hours prior to first day of arrival otehrwise one night room and tax will be charges to the Credit Card on file.

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.

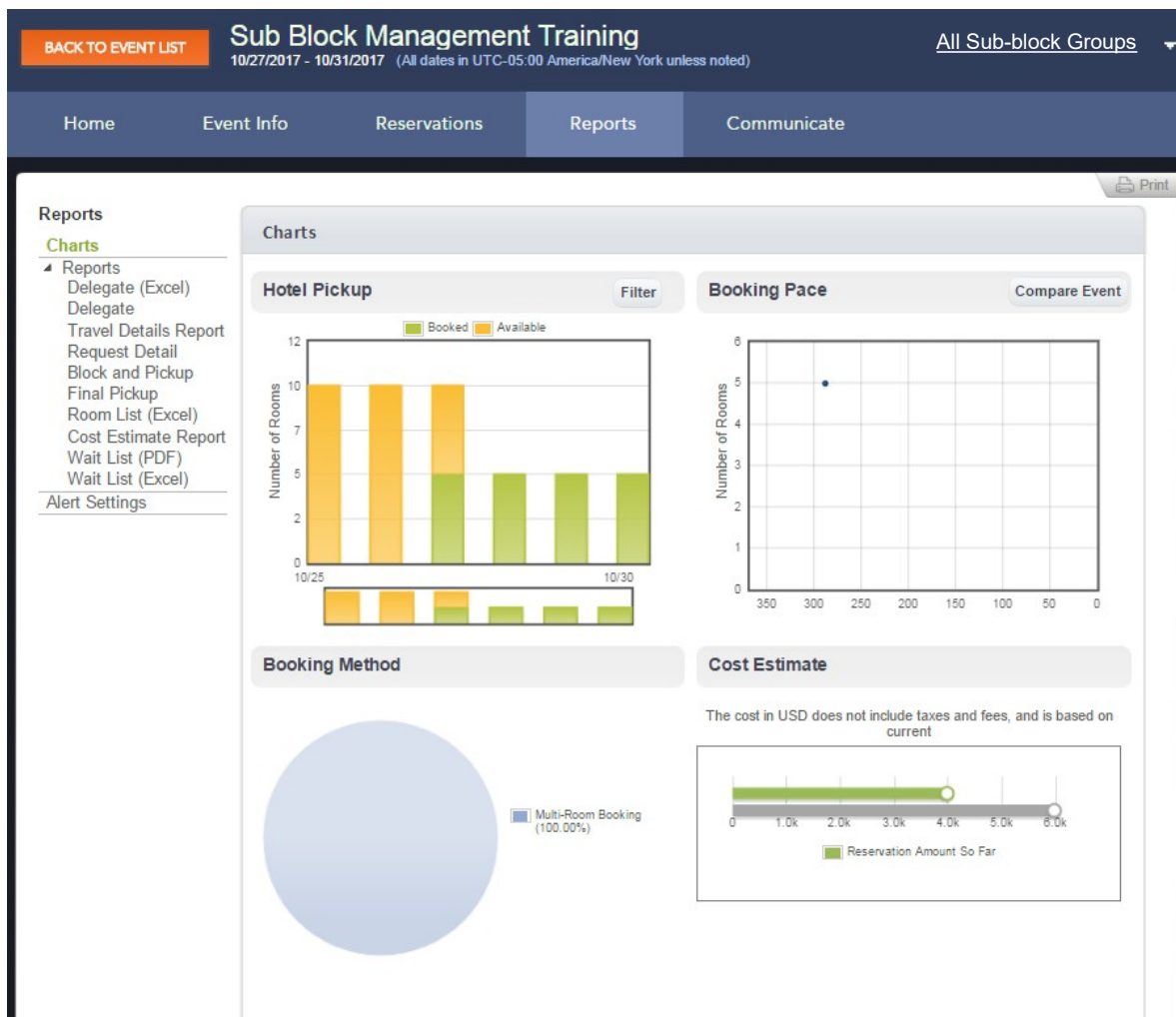
The screenshot displays the 'Sub Block Management Training' interface. At the top, there is a header bar with a 'BACK TO EVENT LIST' button, the title 'Sub Block Management Training', the dates '10/27/2017 - 10/31/2017', and a note '(All dates in UTC-05:00 America/New York unless noted)'. A dropdown menu for 'All Sub-block Groups' is also present. Below the header is a navigation bar with links for 'Home', 'Event Info', 'Reservations' (which is highlighted), 'Reports', and 'Communicate'. On the left side, there is a sidebar menu with 'Sub-block Requests' (containing 'Training Request Form 2' and 'Training Request Form'), 'Manage Bookings' (containing 'Multiple Booking' and 'Room Lists'), and 'Find Reservations' (highlighted in green). The main content area features the 'Find Reservations' form. This form includes a search bar at the top right labeled 'Enter Acknowledgment Number'. The form fields are organized into three columns: 'Master Acknowledgment Number', 'Company', and 'Check Number' in the first row; 'Acknowledgment Number', 'E-mail', and 'Reference Number' in the second row; 'First Name', 'Phone', and 'Credit Card Type' in the third row; and 'Last Name', 'Arrival Date', and 'Card Number (last 4 digits)' in the fourth row. There is also a dropdown menu for 'All Attendee Types' with 'All Attendee Types' selected. At the bottom right of the form, there are 'Search' and 'Close' buttons. A 'Print' button is located in the top right corner of the main content area.

Reports Tab

Charts: When accessing the reports tab, a variety of charts will be displayed 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 or 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.

BACK TO EVENT LIST

Sub Block Management Training

10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted)

All Sub-block groups ▾

Home

Event Info

Reservations

Reports

Communicate

Communicate

My Messages

Email Delegates

Documents

My Messages

New Message

Search Message

Posted By	Message	Posted On
Tim Mathes	<div><div>Sbu-block Request</div><div>Hello lma,Your request for sub-block inventory has been approved and inventory has been allocated. Let me know if you have any questions. ...</div></div>	01/12/2017

Results 1 - 1 of 1 1

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.

The screenshot displays the 'Sub Block Management Training' interface. At the top, there is a header bar with a 'BACK TO EVENT LIST' button, the title 'Sub Block Management Training', the dates '10/27/2017 - 10/31/2017', and a note '(All dates in UTC-05:00 America/New York unless noted)'. On the right of the header is a dropdown for 'All Sub-block Groups'. Below the header is a navigation bar with tabs: 'Home', 'Event Info', 'Reservations' (highlighted with a red box), 'Reports', and 'Communicate'. The main content area is divided into a left sidebar and a central form. The sidebar has two sections: 'Sub-block Requests' with links for 'Training Request Form 2' and 'Training Request Form', and 'Manage Bookings' with links for 'Multiple Booking', 'Room Lists', and 'Find Reservations' (highlighted in green). The central form is titled 'Find Reservations' and contains a search bar 'Enter Acknowledgment Number' with a magnifying glass icon. Below the search bar are several input fields: 'Master Acknowledgment Number', 'Company', 'Check Number', 'Acknowledgment Number', 'E-mail', 'Reference Number', 'First Name', 'Phone', 'Credit Card Type' (a dropdown menu), 'Last Name', 'Arrival Date' (with a calendar icon), and 'Card Number (last 4 digits)'. At the bottom left of the form is a dropdown for 'All Attendee Types' with 'All Attendee Types' selected. At the bottom right of the form is a green 'Search' button (highlighted with a red box) and a blue 'Close' link. A 'Print' button is located in the top right corner of the main content area.

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.

[BACK TO EVENT LIST](#)

Sub Block Management Training

10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted)

[Hormel](#)

[Home](#)[Event Info](#)[Reservations](#)[Reports](#)[Communicate](#)

Sub-block Requests

Training Request Form 2

Training Request Form

Manage Bookings

Multiple Booking Room Lists

Find Reservations

Find Reservations

Enter Acknowledgment Number

Ack#

Res

Name & Company

Occ

Address

Hotel

Action

32JH99JC0

Act

Smith, Bill

Act

Hilton Training Hotel
10/27/2017 - 10/31/2017

32JH99JR0

Act

Doe, Jane

Act

Hilton Training Hotel
10/27/2017 - 10/31/2017

32JH99JT0

Act

Dodger, Roger

Act

Hilton Training Hotel
10/27/2017 - 10/31/2017

32JH99JW0

Act

Jones, Randy

Act

Hilton Training Hotel
10/27/2017 - 10/31/2017

32JH99K20

Act

Frost, Robert

Act

Hilton Training Hotel
10/27/2017 - 10/31/2017

Results 1 - 5 of 5 1

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.

The screenshot displays the 'Sub Block Management Training' dashboard. At the top, there's a header with a 'BACK TO EVENT LIST' button, the event title 'Sub Block Management Training', the dates '10/27/2017 - 10/31/2017', and a user profile 'Hornel'. Below the header is a navigation bar with tabs: 'Home', 'Event Info', 'Reservations' (highlighted with a red box), 'Reports', and 'Communicate'. On the left side, there's a sidebar menu with 'Sub-block Requests' (containing 'Training Request Form 2' highlighted with a red box) and 'Manage Bookings' (containing 'Multiple Booking Room Lists' and 'Find Reservations'). The main content area is titled 'Find Reservations' and contains a search form with fields for 'Master Acknowledgment Number', 'Company', 'Check Number', 'Acknowledgment Number', 'E-mail', 'Reference Number', 'First Name', 'Phone', 'Credit Card Type', 'Last Name', 'Arrival Date', and 'Card Number (last 4 digits)'. There's also a dropdown for 'All Attendee Types'. A 'Search' button and a 'Close' link are at the bottom right of the form.

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.

The screenshot shows the 'Sub Block Management Training' interface. The top navigation bar includes 'Home', 'Event Info', 'Reservations', 'Reports', and 'Communicate'. The 'Reservations' tab is active. The main content area is titled 'Training Request Form' with a sub-block request deadline of 10/31/2016. The form is for a 'Night by Night by Hotel' request. It features a table with columns for days of the week (Tue 10/24, Wed 10/25, Thu 10/26, Fri 10/27, Sat 10/28, Sun 10/29) and rows for different hotels. The 'Total Request' row shows 0 rooms for Tue, 10 for Wed, 10 for Thu, 10 for Fri, 0 for Sat, and 0 for Sun. The 'Best Western Training Hotel' row shows 0 for Tue, 10 for Wed, 10 for Thu, 10 for Fri, 0 for Sat, and 0 for Sun. The 'Hilton Training Hotel' row shows 0 for Tue, 0 for Wed, 0 for Thu, 0 for Fri, 0 for Sat, and 0 for Sun. The 'IHG Training Hotel' row shows 0 for Tue, 0 for Wed, 10 for Thu, 10 for Fri, 10 for Sat, and 0 for Sun. The 'Marriott Training Hotel' row shows 0 for Tue, 0 for Wed, 0 for Thu, 0 for Fri, 0 for Sat, and 0 for Sun. A 'Save and Continue' button is at the bottom.

Training Request Form		Sub-block Request Deadline 10/31/2016					
	Tue 10/24	Wed 10/25	Thu 10/26	Fri 10/27	Sat 10/28	Sun 10/29	
Total Request	0	10	10	10	0	0	
Best Western Training Hotel Rates include breakfast	0	10	10	10	0	0	
Hilton Training Hotel Shuttle will be provided	0	0	0	0	0	0	
IHG Training Hotel	0	0	10	10	10	0	
Marriott Training Hotel \$130-\$145	0	0	0	0	0	0	

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

The screenshot shows the 'Sub Block Management Training' interface. The top navigation bar includes 'Home', 'Event Info', 'Reservations', 'Reports', and 'Communicate'. The 'Reservations' tab is active. The main content area is titled 'Training Request Form' with a sub-block request deadline of 10/31/2016. The form is for a 'Night by Night Total' request. It features a table with columns for days of the week (Tue 10/24, Wed 10/25, Thu 10/26, Fri 10/27, Sat 10/28, Sun 10/29) and rows for different hotels. The 'Total Request' row shows 0 rooms for Tue, 0 for Wed, 0 for Thu, 0 for Fri, 0 for Sat, and 0 for Sun. The 'Best Western Training Hotel' row shows 0 for Tue, 10 for Wed, 10 for Thu, 10 for Fri, 10 for Sat, and 0 for Sun. The 'Hilton Training Hotel' row shows 0 for Tue, 0 for Wed, 0 for Thu, 0 for Fri, 0 for Sat, and 0 for Sun. The 'IHG Training Hotel' row shows 0 for Tue, 0 for Wed, 0 for Thu, 0 for Fri, 0 for Sat, and 0 for Sun. The 'Marriott Training Hotel' row shows 0 for Tue, 0 for Wed, 0 for Thu, 0 for Fri, 0 for Sat, and 0 for Sun. A 'Save and Continue' button is at the bottom.

Training Request Form		Sub-block Request Deadline 10/31/2016					
	Tue 10/24	Wed 10/25	Thu 10/26	Fri 10/27	Sat 10/28	Sun 10/29	
Total Request	0	0	0	0	0	0	
Best Western Training Hotel	0	10	10	10	10	0	
Hilton Training Hotel	0	0	0	0	0	0	
IHG Training Hotel	0	0	0	0	0	0	
Marriott Training Hotel	0	0	0	0	0	0	

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”

The screenshot displays the 'Sub Block Management Training' interface. At the top, there's a header with a 'BACK TO EVENT LIST' button, the title 'Sub Block Management Training', dates '10/27/2017 - 10/31/2017', and a user profile 'Hornel'. Below the header is a navigation bar with links: Home, Event Info, Reservations, Reports, and Communicate. The main content area is titled 'Sub-block Requests' and includes a sidebar with links like 'Training Request Form 2', 'Training Request Form', 'Manage Bookings', 'Multiple Booking Room Lists', and 'Find Reservations'. The central 'Training Request Form' is titled 'Sub-block Request Preferences' and includes a 'Sub-block Request Deadline 01/23/2017'. The form is divided into several sections: 'Instructions' (a large text area), 'Hotel Type' (a list of 5 choices with dropdown menus), 'Price Range' (a list of 5 choices with dropdown menus), 'Room Preferences' (a list of 5 choices with dropdown menus), and 'Other Requests' (a text area with the prompt 'Add any special requests you may need during your event'). At the bottom of the form, there are two buttons: 'Save and Go to Previous Page' and 'Submit'. The 'Submit' button is highlighted with a red box.

Sub-block Request Preferences

Instructions

Hotel Type

1st choice: Large Convention Hotel
2nd choice: Suite Property
3rd choice: Close to airport
4th choice: No preference
5th choice: No preference

Price Range

1st choice: No preference
2nd choice: No preference
3rd choice: No preference
4th choice: No preference
5th choice: No preference

Room Preferences

1st choice: No preference
2nd choice: No preference
3rd choice: No preference
4th choice: No preference
5th choice: No preference

Other Requests

Add any special requests you may need during your event
low floor for all rooms

[Save and Go to Previous Page](#) [Submit](#)

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

The screenshot shows the dashboard for "Sub Block Management Training" from 10/27/2017 to 10/31/2017. The top navigation bar includes "Home", "Event Info", "Reservations", "Reports", and "Communicate". A "Submit a room list" link is highlighted in the top right. The main content area features a 100.0% availability gauge, a summary table of room nights, and event dates.

BLOCK	BOOKED	AVAILABLE
7,700 + Room nights	0 Room nights	7,700 Room nights
USD 1,480,600.00	USD 0	USD 1,480,600.00

RESERVATIONS OPEN	RESERVATIONS DEADLINE	EVENT STARTS
10/24/2016	09/27/2017	10/27/2017

258 days until event cutoff

The screenshot shows the "Reservations" tab selected in the dashboard. The left sidebar contains links for "Sub-block Requests", "Manage Bookings", and "Find Reservations". The "Room Lists" link under "Manage Bookings" is highlighted. The main area displays the "Find Reservations" form with various input fields.

Find Reservations

Enter Acknowledgment Number [Search]

Master Acknowledgment Number	Company	Check Number
Acknowledgment Number	E-mail	Reference Number
First Name	Phone	Credit Card Type
Last Name	Arrival Date	Card Number (last 4 digits)

Submit a Room List (cont.)

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

The screenshot shows the 'Sub Block Management Training' interface. At the top, there's a navigation bar with 'Home', 'Event Info', 'Reservations', 'Reports', and 'Communicate'. Below this, a sidebar on the left lists 'Sub-block Requests' with various training request forms. The main content area is titled 'Room Lists' and contains a search bar and a prominent green button labeled 'Submit a new room list', which is highlighted with a red rectangular box.

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

This screenshot shows the 'Submit a room list' form. It includes 'Helpful Hints' about using mapping templates and file formats. Below the hints, there's a section for file selection with a text input field and a 'Browse' button, which is highlighted with a red rectangular box. There are also 'Cancel' and 'Submit' links at the bottom.

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.

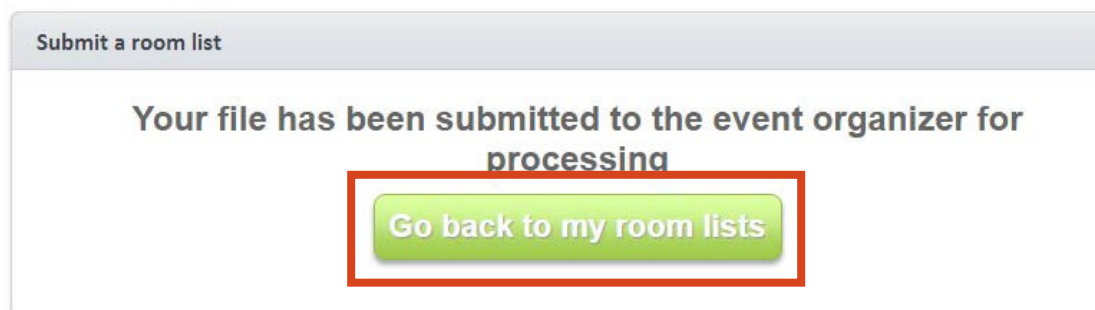
Tick the check box under Guest Notification Emails if you would like your guests to receive promotional and/or informational emails for this event (Opt in).

Click the “Submit” button.

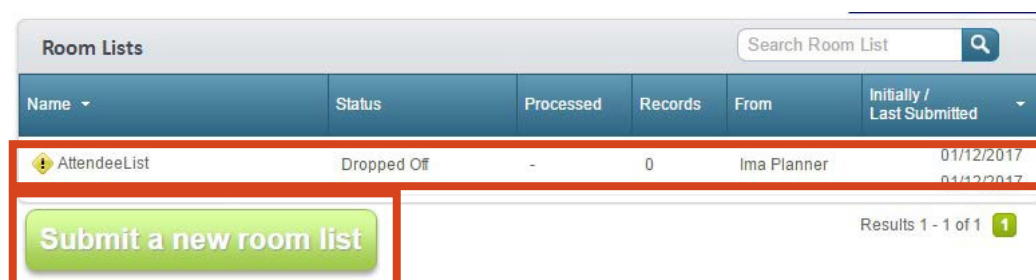
This screenshot shows the 'Submit a room list' form with several fields highlighted by red boxes. The 'List name' field contains 'AttendeeList'. The 'Column headers are on row number' field is empty. The 'What is the date format used in your room list?' dropdown is set to 'Select a format'. The 'Room List Notes' text area is empty. The 'Guest Notification Emails' checkbox is checked. The 'Submit' button is highlighted with a red rectangular box.

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.

The screenshot shows the 'Make Bulk Reservations' interface. At the top, there's a 'New' tab and a 'Reservations' tab. Below the tabs are buttons for 'Submit', 'Delete', 'Defaults', 'Apply', and 'Clear'. The main area is a table with the following columns: Title, * First Name, Middle Name, * Last Name, E-mail, Check-in, Check-out, * Attendee Type, Hotel, Room Type, and Send Ack. The table has 7 rows. Red boxes highlight the input fields for the first row (row 1) and the dropdown menus for Attendee Type, Hotel, and Room Type in row 2.

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.

The screenshot shows the 'New Reservations' form. At the top, there are tabs for 'New' and 'Reservations'. Below the tabs are buttons for 'Submit', 'Delete', 'Defaults', 'Apply', and 'Clear'. The form contains several input fields for guest information: Title, * First Name, Middle Name, * Last Name, E-mail, Check-In, Check-Out, * Attendee Type, Hotel, Room Type, and Send Ack. Below these fields is a section titled 'Contact information' which includes Position, Company, Address 1, Address 2, Country (with a 'Select Co...' dropdown), State, Postal, City, Phone, and Fax. A checkbox at the bottom of this section is labeled 'Yes, I'd like to be notified about upcoming event specials and promotions. We never sell or rent email addresses; see our [Privacy Policy](#)'. A green 'Done' button is located at the bottom right of the 'Contact information' section. Below the form is a table with 4 rows, each containing checkboxes, input fields, and dropdown menus.

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.

The screenshot shows the 'New Reservations' form with the 'Submit' button highlighted in a red box. Below the form is a table with 4 rows. The first row is highlighted with a red box around the '1' checkbox. The 'Send Ack' checkbox in the first row is also highlighted with a red box. The table contains checkboxes, input fields, and dropdown menus for each row.

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.

- 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.
- 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).
- Click the Apply Button to auto fill information into the reservation number(s) that you selected

The screenshot shows the 'New Reservations' interface. At the top, there are 'Submit' and 'Delete' buttons. Below them is a 'Defaults' section with 'Apply' and 'Clear' buttons. The 'Apply' button is highlighted with a red box. The table below has columns: Title, * First Name, Middle Name, * Last Name, E-mail, Check-In, Check-Out, * Attendee Type, Hotel, Room Type, More Info, and Send Ack. The first row is highlighted in gray, and the first four rows are selected (checked) and highlighted in gray.

- 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.

The screenshot shows the 'New Reservations' interface. At the top, there are 'Submit' and 'Delete' buttons. The 'Submit' button is highlighted with a red box. Below them is a 'Defaults' section with 'Apply' and 'Clear' buttons. The table below has columns: Title, * First Name, Middle Name, * Last Name, E-mail, Check-In, Check-Out, * Attendee Type, Hotel, Room Type, More Info, and Send Ack. The first two rows are highlighted in red, indicating they still require data for successful submission.

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).

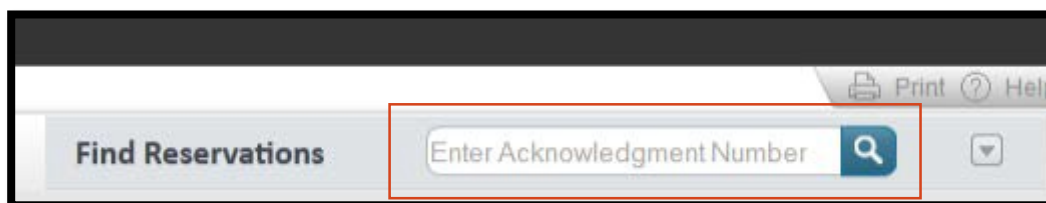
The screenshot displays the MRB (Making Reservations) interface. A pop-up dialog titled "Submit Records" is centered on the screen, indicating successful processing of 2 records. The dialog text reads: "Finished processing 2 of 2 record(s). 2 Confirmed. 0 Waitlisted. 0 Not Confirmed. All records were successfully saved. Click OK to go to the Reservations tab." An "OK" button is visible at the bottom of the dialog. The background interface shows a table with columns for Title, First Name, Middle Name, Last Name, Attendee Type, Hotel, Room Type, and Send Ack. The first two rows are filled with "John Doe" and "Jane Doe".

Title	* First Name	Middle Name	* Last Name	* Attendee Type	Hotel	Room Type	Send Ack
1	John		Doe	Staff	GroupMA...	Deluxe King	<input type="checkbox"/>
2	Jane		Doe	Staff	GroupMA...	Deluxe King	<input type="checkbox"/>
3				-Select-	-Select-	-Select-	<input type="checkbox"/>
4				-Select-	-Select-	-Select-	<input type="checkbox"/>
5				-Select-	-Select-	-Select-	<input type="checkbox"/>
6				-Select-	-Select-	-Select-	<input type="checkbox"/>

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.

<input type="checkbox"/>	Source	Ack ▾	Status	Title	First Name	Middle Name	Last Name	E-mail	Check-In	Check-Out
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CW	Confirmed		Joe		Nelson		09/23/2016	09/26/2016
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CV	Confirmed		Jimmy		Anderson		09/23/2016	09/26/2016
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CT	Confirmed		Lenny		DiNardo		09/23/2016	09/26/2016
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CS	Confirmed		Joe		Nelson		09/23/2016	09/26/2016
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CD	Confirmed		Jimmy		Anderson		09/23/2016	09/26/2016

<input type="checkbox"/>	Source	Ack ▾	Status	Title	First Name	Middle Name	Last Name	E-mail	Check-In	Check-Out
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CW	Confirmed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	09/23/2016 <input type="text"/>	09/26/2016 <input type="text"/>
<input type="checkbox"/> ✎ ✖	RL - AttendeeLi...	328GK8CV	Confirmed		Jimmy		Anderson		09/23/2016	09/26/2016

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.

	Source	Ack	Status	Title	First Name	Middle Name	Last Name	E-mail	Check-In	Check-Out	Attendee Type	Hotel	Room Type	Send Ack
<input type="checkbox"/>	RL - AttendeeLi...	328GKSCW	Confirmed		Joe		Nelson		09/23/2016	09/25/2016	Attendee	Hilton T...	1 King Bed	<input type="checkbox"/>
<input type="checkbox"/>	RL - AttendeeLi...	328GKSCV	Confirmed		Jimmy		Anderson		09/23/2016	09/25/2016	Attendee	Hilton Training Hotel	1 King Bed	<input type="checkbox"/>

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

Edit booking x Close
Booking successfully modified.

	Source	Ack	Status	Title	First Name	Middle Name	Last Name	E-mail	Check-In	Check-Out
<input type="checkbox"/>	Web	328GB44T	Confirmed	Mr.	Kia		Kia	user@passkey.com	09/23/2014	09/25/2014

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.

BACK TO EVENT LIST Sub Block Management Training 10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted) All Sub-block groups

Home Event Info Reservations Reports Communicate

Reports

Charts

Reports

Delegate (Excel)

Delegate

Travel Details Report

Request Detail

Block and Pickup

Room List (Excel)

Cost Estimate Report

Wait List (PDF)

Wait List (Excel)

Alert Settings

Block and Pickup

Select Parameters

Step 1: Please select a hotel(s) for the report

All Hotels

Best Western Training Hotel

Hilton Training Hotel

IHG Training Hotel

Marriott Training Hotel

Step 2: Please select a room type(s) for the report

All Room Types

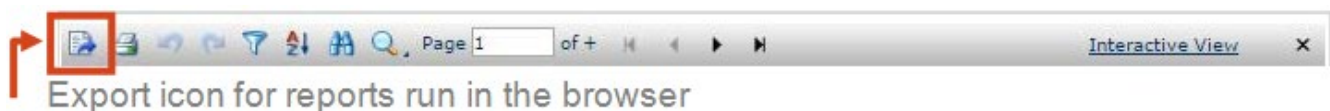
1 King Beds

Executive Grand Suite

KING

QUEEN

Generate Report



Working with Alerts

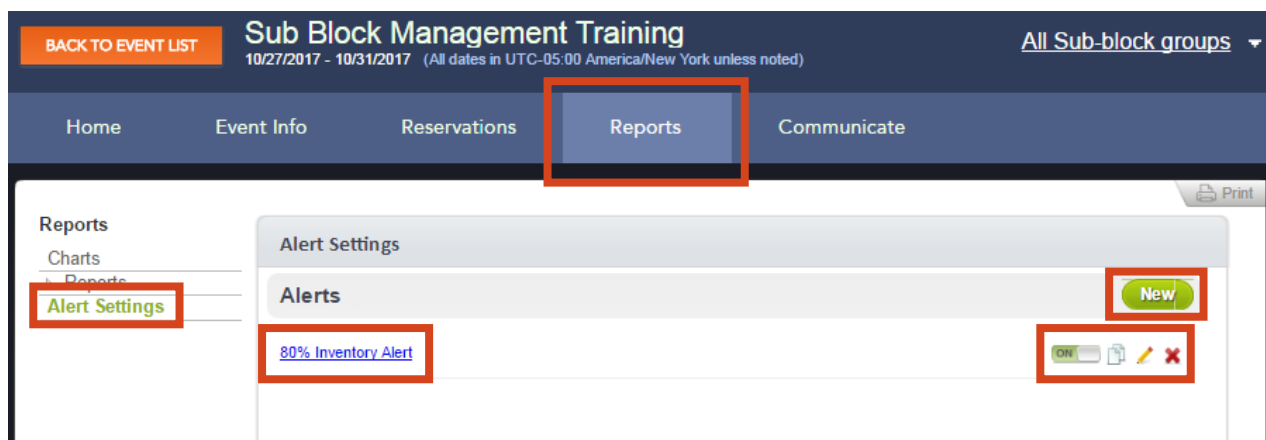
The alerts section of the Reports Tab allows planners to edit settings on any Inventory Alerts (one of the SmartAlerts in the system) that have been set up by the hotel or event organizer as well as allowing planners to create their own inventory alerts.

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.

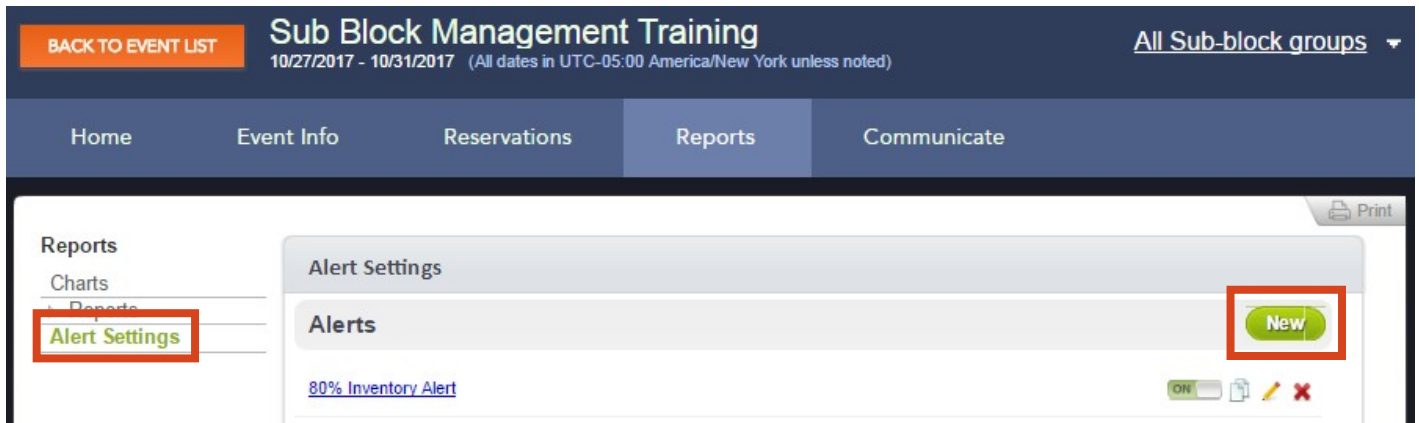
1. Click on Alerts Settings in the left menu to view any inventory alerts that have been enabled by the hotel or event organizer. Click the “New” button to create a new inventory alert.
2. The alert must be turned on to be sent. Click an “Off” switch to turn it on to enable the alert to be sent. Click 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

A screenshot of the 'Alert Settings' form. It features two input fields: 'Alert Name:' and 'Alert Type:'. The 'Alert Type:' dropdown menu is set to 'Inventory Rule'. To the right of these fields is a 'View a Sample' link. The entire form area is outlined with a red border.

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

A screenshot of the 'SmartAlert Set-up' form. It is divided into three main sections: 1. Alert Parameters, 2. Alert Start Date, and 3. Alert End Date. Section 1 includes options for 'Send this alert if:' (Any night), 'Is' (at least), 'at' (0), and 'How often to send this alert:' (Once per day). Section 2 includes options for 'Alert Start Date' (Reservation Open, Event Cutoff, Reservation Close) and '7 day(s) before'. Section 3 includes options for 'Alert End Date' (Event Cutoff, Reservation Close, Event End) and '7 day(s) before'. The entire form is outlined with a red border.

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”

The screenshot shows the 'Recipient List' configuration interface. Red boxes highlight the following areas:

- Organization:** A dropdown menu showing 'Lanyon Passkey Training Org'.
- Add Recipients:** A list of users including 'Ian Methven, Intern', 'Org Trainee 1', 'Org Trainee 2', 'Org Trainee 3', 'Org Trainee 4', 'Org Trainee 5', 'Subblock Training', 'Tim Mathes', and 'casey woolsey'.
- Send From:** A text field containing 'imaplanner@mail.com'.
- Current Recipients:** An empty list box with left and right arrow buttons.
- Enter Additional Recipients:** A large text area for entering multiple email addresses, separated by commas.
- Send to My Event Users:** An unchecked checkbox.
- Send a welcome SmartAlert once to each recipient:** An unchecked checkbox with a link to 'View a Sample'.

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.

The screenshot shows the 'SmartAlert Message' configuration interface. Red boxes highlight the following areas:

- Message Text Area:** A large text area with the placeholder text 'Add your personalized message here'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom left.

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.

The screenshot displays the 'Sub Block Management Training' dashboard for the period 10/27/2017 - 10/31/2017. The dashboard includes a navigation bar with tabs for Home, Event Info, Reservations, Reports, and Communicate. A summary section shows a pie chart with 0.5% booked and 99.5% available, along with a table of room nights and revenue. The 'Hotel Pickup' section features a bar chart showing the number of rooms booked and available from 10/24 to 11/03. The 'Bulletin Board' section contains a message from Tim Mathes dated 01/12/2017. A red box highlights the 'New Message' button in the bottom right corner of the Bulletin Board section.

BACK TO EVENT LIST **Sub Block Management Training** [All Sub-block groups](#) ▼
10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted)

Home Event Info Reservations Reports Communicate

[Submit a room list](#) [Print](#)

Summary:
BLOCK: 7,700 Room nights (USD 1,480,600.00)
BOOKED: 40 Room nights (USD 7,960.00)
AVAILABLE: 7,660 Room nights (USD 1,472,640.00)

RESERVATIONS OPEN: 10/23/2016
RESERVATIONS CUTOFF: 09/27/2017
EVENT STARTS: 10/27/2017

257 days until event cutoff

Hotel Pickup View: Chart | Table Filter
Number of Rooms: 0 to 800
X-axis: 10/24 to 11/03
Legend: Booked (green), Available (orange)

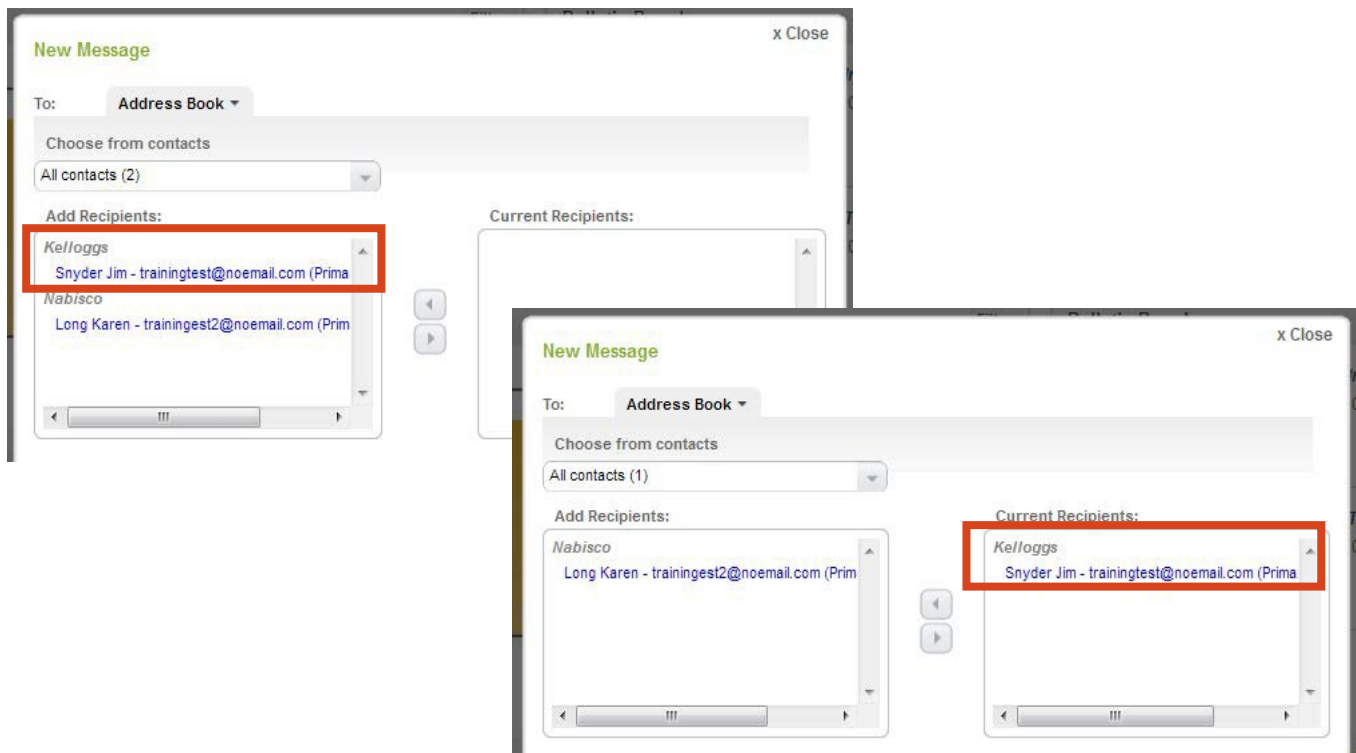
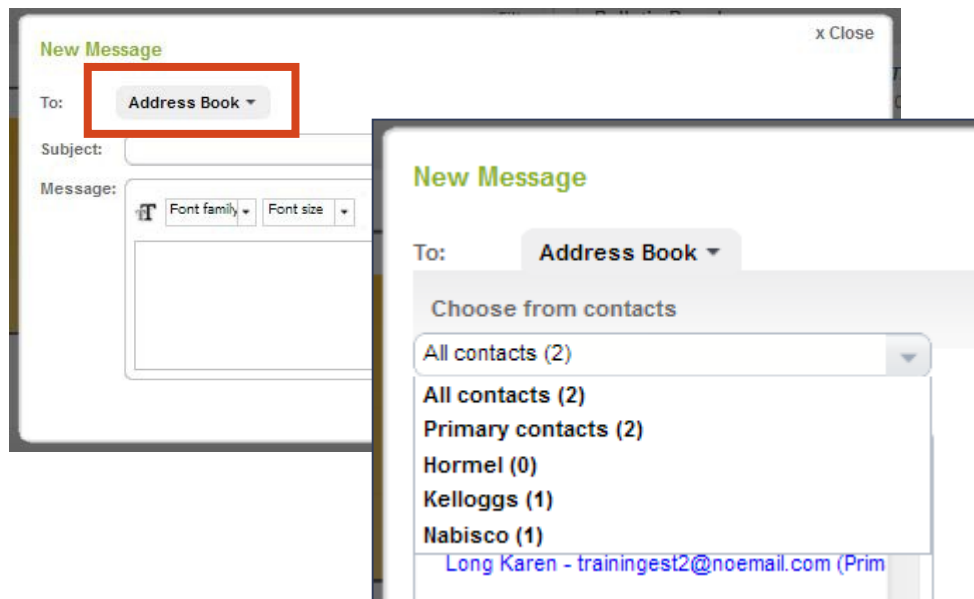
Bulletin Board
[Sub-block Request](#) **Tim Mathes**
Hello Ima, Your request for sub-block inventory has been approved and inventory has been allocated. ...
01/12/2017

New Message

DRLM01B_TW-11142016 Copyright © 1997-2017 Passkey International, Inc. All Rights Reserved. [Privacy Policy](#) [Terms and Conditions](#)

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.

New Message x Close

To: **Address Book** ▼

Choose from contacts

All contacts (1) ▼

Add Recipients:

Nabisco
Long Karen - trainingest2@noemail.com (Prim

Current Recipients:

Kelloggs
Snyder Jim - trainingtest@noemail.com (Prima

Subject:

Message:

Font family ▼ Font size ▼ **B** *I* **T** HTML

Post

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.

The screenshot displays the 'Sub Block Management Training' interface. At the top, there is a header bar with a 'BACK TO EVENT LIST' button, the event title 'Sub Block Management Training', the dates '10/27/2017 - 10/31/2017', and a note '(All dates in UTC-05:00 America/New York unless noted)'. On the right of the header is a link for 'All Sub-block groups'. Below the header is a navigation bar with tabs: Home, Event Info, Reservations, Reports, and Communicate (which is currently selected). The main content area is divided into a left sidebar and a central panel. The sidebar, under the 'Communicate' heading, contains links for 'My Messages', 'Email Delegates', and 'Documents'. The central panel, titled 'My Messages', features a 'New Message' button and a search bar. It contains a table of messages:

Posted By	Message	Posted On
Ima Planner	Checking In Hi Jim. Just checking in to make sure things are running smoothly with your block. Let me know if you need any assistance and I can contact ...	01/13/2017
Tim Mathes	Sub-block Request Hello Ima, Your request for sub-block inventory has been approved and inventory has been allocated. Let me know if you have any questions. ...	01/12/2017

A pop-up window is overlaid on the messages, showing the details of the 'Checking In' message. It includes a title bar with 'Checking In' and a close button. The message details are as follows:

Checking In x Close

From: [Ima Planner](#)

Posted: 01/13/2017

Subject: Checking In

Hi Jim. Just checking in to make sure things are running smoothly with your block. Let me know if you need any assistance and I can contact the Event Organizer for you if needed. I am meeting with them next week. Thank you

Close

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.

The screenshot shows the 'Sub Block Management Training' dashboard. At the top, there's a header with 'BACK TO EVENT LIST', the event title 'Sub Block Management Training', dates '10/27/2017 - 10/31/2017', and a note '(All dates in UTC-05:00 America/New York unless noted)'. On the right, there's a link 'All Sub-block groups'. Below the header is a navigation bar with tabs: Home, Event Info, Reservations, Reports, and Communicate. The 'Communicate' tab is active. On the left side of the 'Communicate' section, there's a sidebar with 'My Messages', 'Email Delegates' (highlighted), and 'Documents'. The main content area shows the 'Email Delegates' table with columns for Campaign type, Name, and Enabled. The table lists four categories: Pre Arrival, Post Event, Event Specials, and Quick Notify, each with an 'add' link and a status switch (ON/OFF) and icons for copy, edit, and delete.

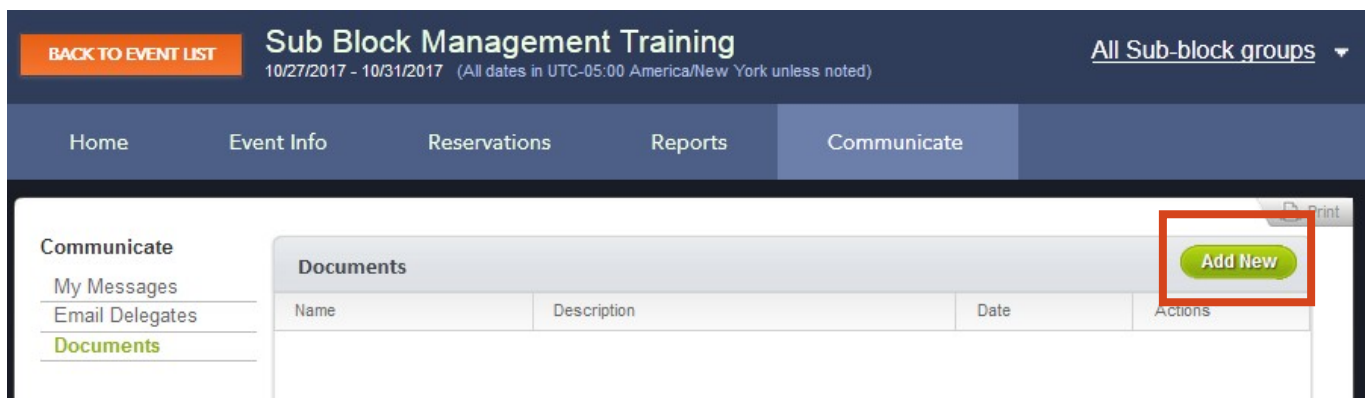
Campaign type	Name	Enabled
Pre Arrival (add)	Pre-Arrival	<input checked="" type="checkbox"/>   
Post Event (add)	None added yet.	
Event Specials (add)	Extended Stay	<input checked="" type="checkbox"/>   
Quick Notify (add)	Quick Notify	<input checked="" type="checkbox"/>   

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.

A screenshot of the 'Add New Document' modal form. The title is 'Add New Document' with a close button (x Close). A warning message states: 'This document will be visible to everyone in the event. Do not upload any sensitive information.' The form contains two main sections: 'Document:' with a text input field containing 'Gala Menu.docx' and a 'Browse' button (highlighted with a red box); and 'Description:' with a larger text input field containing 'Gala dinner and cocktail hour menu' (highlighted with a red box). At the bottom, there is a green 'Add' button (highlighted with a red box) and a blue 'Close' link.

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.

[BACK TO EVENT LIST](#)

Sub Block Management Training

10/27/2017 - 10/31/2017 (All dates in UTC-05:00 America/New York unless noted)

[All Sub-block groups](#) ▼





[Home](#)[Event Info](#)[Reservations](#)[Reports](#)[Communicate](#)

Communicate

[My Messages](#)[Email Delegates](#)[Documents](#)

Documents




Add New

Name	Description	Date	Actions
 Gala Menu.docx	Gala dinner and cocktail hour menu	01/13/2017	
 Day one schedule.xls	Schedule for Day one	01/13/2017	

DRLM01B_TW-11142016

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Appendix A – Email Campaigns Checklist

Modifying the “Send” date on the Campaign	
<input type="checkbox"/>	Select the Campaign and click on edit icon 
<input type="checkbox"/>	Scroll to the Timing section of the Campaign
<input type="checkbox"/>	Set the timing for the campaign: <ul style="list-style-type: none"> • 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	
<input type="checkbox"/>	Scroll to the Recipients section (This will default to “All” unless changed) <ul style="list-style-type: none"> • Select the Attendee Type(s) and/or Room Type(s) Note: Some campaigns have additional options that may be selected.
<input type="checkbox"/>	Scroll to the Subject line in the Layout Section (this will be set to a default from the library setting) <ul style="list-style-type: none"> • Modify the Subjectline
<input type="checkbox"/>	Scroll to the From Section (this will be set to a default from the library setting) <ul style="list-style-type: none"> • Modify the Fromline
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	
<input type="checkbox"/>	Scroll to the body of the campaign
<input type="checkbox"/>	Place the cursor where you would like the image to appear
<input type="checkbox"/>	Click the Image icon in the tool bar 
<input type="checkbox"/>	Select Browse and locate the saved image on your computer (<i>Hint: Image must be .jpeg, .png or .gif format and no more than 600 pixels wide</i>)
<input type="checkbox"/>	Click the Upload file button
<input type="checkbox"/>	Optional: Fill in the Image Description for any recipients whose email is not HTML enabled
<input type="checkbox"/>	Click Insert
<input type="checkbox"/>	Scroll to the bottom of the page and select Save
Modifying Text within a Campaign	
<input type="checkbox"/>	Scroll to the body of the campaign
<input type="checkbox"/>	Select the area to edit the text
<input type="checkbox"/>	Text can be copied and pasted or manually typed
<input type="checkbox"/>	Scroll to the bottom of the page and select Save

Formatting Text within a Campaign	
<input type="checkbox"/>	Scroll to the body of the campaign
<input type="checkbox"/>	<p>Use the tool bar above the Campaign text to format the message. Highlight the desired text and click the corresponding icon.</p> <ul style="list-style-type: none"> ○ Change the font style or size: ○ Bold, italicize, underline: ○ Change the textcolor:
<input type="checkbox"/>	Scroll to the bottom of the page and select Save
Creating a Hyperlink	
<input type="checkbox"/>	Scroll to the body of the campaign
<input type="checkbox"/>	Highlight the text or click on an image to be hyperlinked
<input type="checkbox"/>	Click the Insert/Edit Linkicon:
<input type="checkbox"/>	Enter the URL
<input type="checkbox"/>	Click Insert
<input type="checkbox"/>	Scroll to the bottom of the page and select Save
Adding a Merge Field/Tag	
<input type="checkbox"/>	<p>Select the Tag Category and the tag from the Campaign tool bar:</p>
<input type="checkbox"/>	Scroll to the body of the campaign
<input type="checkbox"/>	Click the mouse where the new tag will be placed
<input type="checkbox"/>	Click the Select Tag icon:
<input type="checkbox"/>	Scroll to the bottom of the page and select Save
Sending a Test Campaign	
<input type="checkbox"/>	Scroll to the bottom of the campaign
<input type="checkbox"/>	Select Send Test Message
<input type="checkbox"/>	<p>Enter your email and select Send</p> <p>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.</p>
Adding Campaigns to Events	
<input type="checkbox"/>	Within the Campaign category name
<input type="checkbox"/>	Select ADD
<input type="checkbox"/>	Edit settings and campaign information/contents
<input type="checkbox"/>	Select Save
<p><i>Note: The Campaign will now appear in the event and can be modified and customized by planners and/or the hotel/event organizer.</i></p>	