



## **EVENT DASHBOARD USER GUIDE WITH ROOM LIST INSTRUCTIONS**

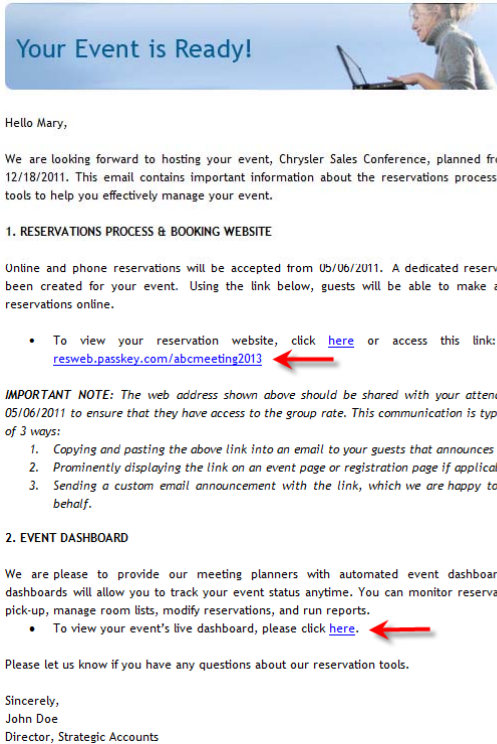
With GroupMAX's Event Dashboards, you can instantly access and manage your reservations, run reports, and monitor your block – online and in real time.

# GETTING STARTED – DASHBOARD ACCESS

## Introduction Email

You will receive an introduction letter containing information related to your event as well as instructions for creating your GroupMAX username and password.

- Reservation Website: Click or copy the link to make individual reservations online.
- Event Dashboard: Click the link to create a username, and begin using online reports and room lists.



*\* Please note that introduction letters' content and format may vary.*

## Creating your GroupMAX account

You will now be prompted to create a username and password, and enter your organization's address information. Once the form has been completed and submitted, you will receive a final confirmation email with a link to log into your Event Dashboard.

*\*Use the image below as a guide to complete this step.*

## Create A New Account

### User Info

Email:  
bchrysler@passkey.com

Title:

\* First Name:

\* Last Name:

\* Phone:

**Confirm your contact information**

### Account Credentials

\* Username:

\* Password:

\* Confirm Password:

\* Security question 1:  
Select a security question:

\* Security question 2:  
Select a security question:

I agree to the [Terms of Use](#)

**Create your username, password and security questions**

\* Passwords must alpha/numeric, and be at least 8 characters in length.  
\* Security questions will allow you to reset your password in

\* Answer:

\* Answer:

You will also be required to click the "Agree" box, and enter your company's name and address, before completing the process.

Upon completion, you will receive a validation email to confirm your access.

## A Message For You



Thank you for creating a new planner account at Passkey.

With this new account, you will be able to access all of your events that are Passkey-enabled in one place.

Click [here](#) to activate your account.

Remember to ask your future event venues to Passkey-enable your events.

GroupMAX powered by Passkey

On the Dashboard login page, enter your username and password to access the dashboard and view your events information in real-time.



Passkey Oct 06, 2011 11:23 PM EDT

Log In

**Log In**

Username

Password

Login

[Forgot your username?](#)

[Forgot your password?](#)

#### **HELPFUL HINTS**

Be sure to save the dashboard login page to your “favorites” to easily access your dashboard.

# Dashboard Information


## Event List

The event list displays information about the event or events you have in GroupMAX. Key statistics are visible and additional information can be viewed by clicking on the name of the event.

Passkey Dec 12, 2011 12:13 PM EST Welcome, Ima | User Profile | Help | Logout

### Your Event Dashboard

Events

2012 Annual Conference			DEC 16, 2012 - DEC 18, 2012 - OPEN		
 <b>BLOCK</b> 33 + room nights GBP 6,600.00	<b>BOOKED</b> 22 room nights GBP 5,500.00	<b>AVAILABLE</b> 11 room nights GBP 1,100.00	<b>RESERVATIONS</b> <b>OPEN</b> Nov 24, 2011	<b>RESERVATIONS</b> <b>DEADLINE</b> Nov 25, 2011	<b>EVENT</b> <b>STARTS</b> Dec 16, 2012

## Home tab

In addition to key event dates, the home tab displays both the overall pickup and availability and the night-by-night information. You are also able to view messages that your event contact has posted to you in the Communication section.



## Event Info tab

The Event Info tab displays the event map with the location of the associated hotel or hotels. Additionally, the hotel's event cancellation policy is displayed by sub-block.

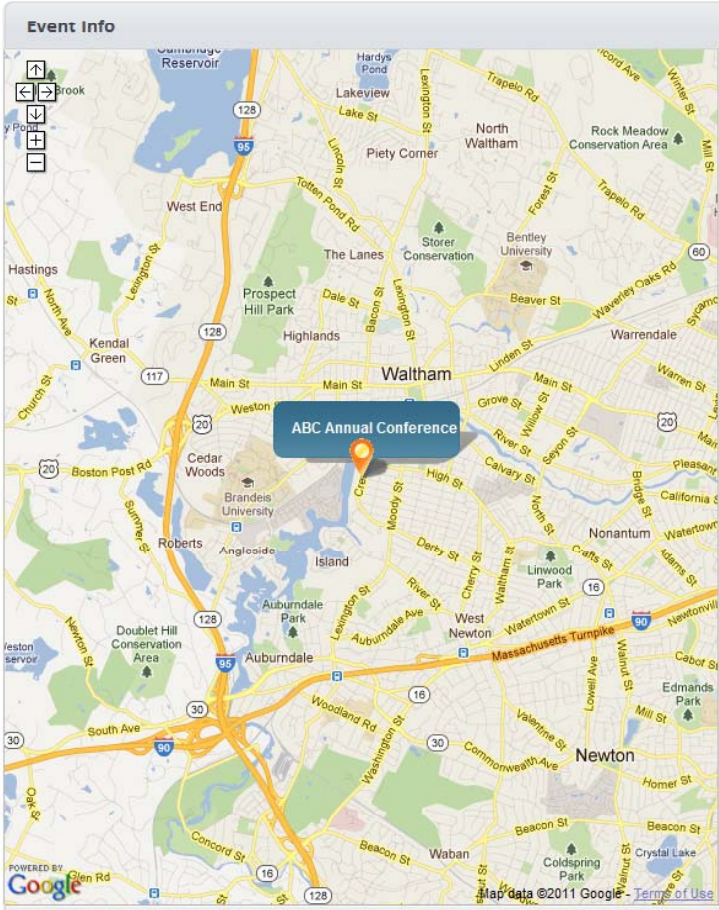
Passkey Dec 12, 2011 14:05 PM EST Welcome, judith | User Profile | Help | Logout

[Back to event list](#)  
**ABC Annual Conference** ▾  
-- Jan 01, 2012 - Jan 06, 2012

Home **Event Info** Bookings Track Event Communicate

Event Info Print

**Map**  
Cancellation Policies



**Event Info**

**Hotel Information**

Click hotel to see it on map.

**Marina Bay Hotel**  
221 Crescent Street  
Waltham, MA 02453  
US

**Contact Information**

Tel: 1-555-888-8888  
Fax: 1-555-888-1000

**Event Venue**

221 Crescent Street  
Waltham, MA 02453  
US  
[See on map](#)

## Bookings tab

The Bookings tab provides an area for the management of room lists and reservations. The Find Reservations screen provides an area to perform a simple or advanced reservation search and view and manage the results of the search. The search will work for all reservations across the event or sub-block group depending on the user's access level.

Passkey Dec 12, 2011 12:20 PM EST Welcome to dashboard | Help

2012 Annual Conference  
 -- Dec 16, 2012 - Dec 18, 2012

Home
Event Info
Bookings
Track Event
Communicate

**Manage Bookings**

- Room Lists
- Website
- Find Reservations**

**Find Reservations** Enter Acknowledgment Number 🔍

Ack#	Res	Name & Company	Occ	Address	Hotel	Action
<a href="#">328SVM680</a>	Act	Smith, John	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM690</a>	Act	Shaw, Jane	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6B0</a>	Act	Baker, Cindy	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6C0</a>	Act	Chrysler, Bob	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6D0</a>	Act	Davis, Al	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6F0</a>	Act	Smith, John	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6G0</a>	Act	Smith, John	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6H0</a>	Act	Shaw, Jane	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	
<a href="#">328SVM6J0</a>	Act	Baker, Cindy	Act	5 Anywhere Street Anywhere, MA 01590	Marina Bay Hotel 1/3/12 - 1/5/12	

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## Bookings tab - Charts

The Track Event tab displays key event reports such as Block & Pickup and Delegate reports. Additionally, Event Planners and Sub-block Group Contacts have access to create and send important inventory alerts from this tab if provided with access by the event organizer.

Charts:

- **Hotel Pickup** – This chart can be filtered for a specific hotel or room type.
- **Booking Pace** - The Pace chart tracks the pickup from the time that housing opened. It can be compared to any previous event you have had in GroupMAX.
- **Booking Method** – This chart tracks how the reservations were booked for the event.
- **Cost Comparison** – This chart shows the estimated cost of active (booked) reservations relative to the cost of the current total block.



## Bookings tab - Reports

Reports can be filtered to include specific information such as: hotel and room type. Column headers on the Delegate Report can be clicked to sort in ascending or descending order. All reports can be printed and/or exported.

- **Block and Pickup** - This report displays the current state of inventory for all attendee types across all hotels in an event. It also provides a breakdown of these numbers by attendee type.

- **Delegate Report** - This report displays all delegates for an event for one or all hotels by last name, attendee type, check-in date, company, or the Passkey acknowledgement number.

Passkey Dec 12, 2011 12:20 PM EST Welcome to dashboard | Help

### 2012 Annual Conference

-- Dec 16, 2012 - Dec 18, 2012

Home   Event Info   **Bookings**   Track Event   Communicate

**Track Event**

Charts

- ▾ Reports
- ▾ Reports
  - ▾ Inventory
  - Block and Pickup**
  - ▾ Reservations
  - ▾ Cost Estimate
  - ▾ Delegate Report
  - ▾ Waitlist
- Alert Settings

**Block and Pickup**

Event: **2011 Annual Conference**

	12/13/2011	12/14/2011	12/15/2011	12/16/2011	12/17/2011	12/18/2011	12/19/2011	12/20/2011	12/21/2011
<b>Original Contract</b>	5	5	5	20	20	20	5	5	
<b>Current Block</b>	20	20	20	43	43	43	20	20	
<b>Pickup</b>	1	3	5	20	21	17	3	3	
<b>Available (Original)</b>	4	2	0	0	0	3	2	2	
<b>Available (Current)</b>	19	17	15	23	22	26	17	17	
<b>In Waiting</b>	0	0	0	0	0	0	0	0	

Hotel Total: **ANdAZ London**   Room Type: **ANdAZ Daluxo King**

	12/13/2011	12/14/2011	12/15/2011	12/16/2011	12/17/2011	12/18/2011	12/19/2011	12/20/2011	12/21/2011
<b>Original Contract</b>	5	5	5	20	20	20	5	5	
<b>Current Block</b>	20	20	20	43	43	43	20	20	
<b>Pickup</b>	1	3	5	20	21	17	3	3	
<b>Available (Original)</b>	4	2	0	0	0	3	2	2	
<b>Available (Current)</b>	19	17	15	23	22	26	17	17	
<b>In Waiting</b>	0	0	0	0	0	0	0	0	

[Return](#) - [Print](#) - [Export](#)

## Communications tab

The Communicate tab provides an area for hotels and event organizers to communicate with Event Planners.

The screenshot shows the Passkey dashboard interface. At the top left, the Passkey logo is followed by the date and time: "Dec 12, 2011 12:20 PM EST". At the top right, it says "Welcome to dashboard | Help". Below this is a banner for the "2012 Annual Conference" with dates "-- Dec 16, 2012 - Dec 18, 2012". A navigation bar contains links for "Home", "Event Info", "Bookings", "Track Event", and "Communicate". The "Communicate" tab is active, showing a "My Messages" section with a "New Message" button and a search bar. A table lists messages, with one message from Judith Colantuono dated 10/07/2011 regarding a "Cut-Off" date.

Passkey Dec 12, 2011 12:20 PM EST Welcome to dashboard | Help

2012 Annual Conference  
-- Dec 16, 2012 - Dec 18, 2012

Home Event Info Bookings Track Event Communicate

Communicate Print

**My Messages** New Message

Search Message

Posted By	Message	Posted On
Judith Colantuono	<b>Cut-Off</b> This is a reminder that your cut off date is approaching. Please be sure to have reservations submitted prior to that date.	10/07/2011

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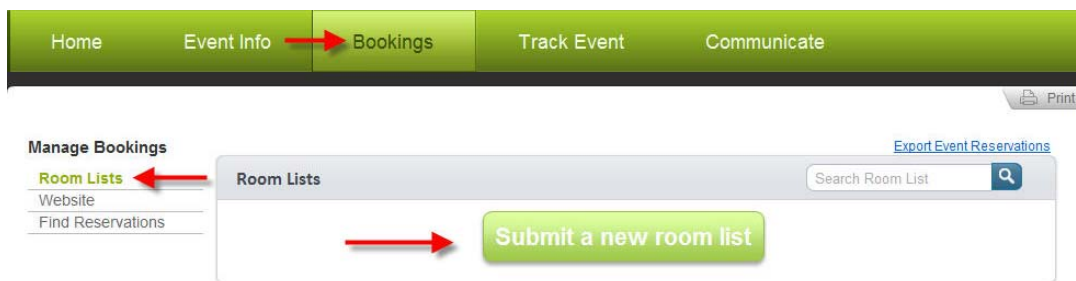
# MANAGING ROOM LISTS

Your Event Dashboard provides quick and easy access for you to deliver your room list information in a secure, PCI compliant manner. You will also have access to manage room list changes and run reports online via the Event Dashboard.

The following instructions will take you through the process of securely delivering and managing your room lists.

## Dropping Off your Room Lists

1. From your Event Dashboard, select the “Bookings” tab, select Room Lists and click the **Submit a new room list** button:



2. Click the **Browse** button to upload your list:



# MANAGING ROOM LISTS

3. After importing the list, the following information must be filled in to successfully deliver your list:

The screenshot shows a web form titled "Submit a room list". At the top, there are "Helpful Hints" with two bullet points: "If the housing manager provided you with a mapping template to use, we strongly recommend using that template." and "Your room list file must be in Excel 1997-2010 (.xls or .xlsx), or in CSV format." The form contains several fields: #1 "Select a File:" with a text input containing "C:\fakepath\Sample RLX list - December Date" and a "Browse" button; #2 "Attendee Type:" with a dropdown menu showing "Select a type"; "List name:" with a text input containing "Sample RLX list - December Date"; #3 "Column headers are on row number:" with a text input; #4 "What is the date format used in your room list?" with a dropdown menu showing "Select a format"; "Room List Notes" with a large text area; "Guest Notification Emails" with a checkbox and text: "Yes, I'd like to notify room list individuals about upcoming event specials and promotions. We never sell or rent email addresses; see our [Privacy Policy](#)."; and a "Submit" button at the bottom right. A "Cancel" link is also present at the bottom left.

1. Upload the list
2. Select the attendee type (if you have access to multiple attendee types)
3. Enter the row number containing your column headers
4. Select the appropriate date format for the list
5. Indicate if the attendees should receive information about specials and promotions from the event organizer

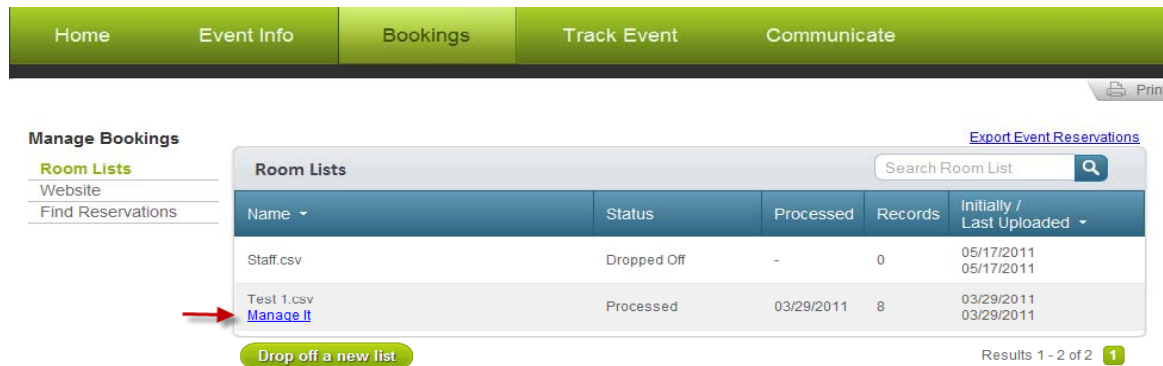
4. Select the **Submit** button after completing the form. You will receive a notice in the window that your list has been successfully submitted, and the hotel will be notified that your room list is ready to be processed.

The screenshot shows a confirmation message box with the text "Your file has been submitted to the event organizer for processing" and a green button labeled "Go back to my room lists".

## Managing Changes

Once your room list has been processed by the hotel, you can manage changes by returning to your **Event Dashboard**, and selecting the **“Bookings”**.

1. Select **Room Lists**. You will now see your room list marked as **“Processed”**. To make changes to the reservations, click on the **“Manage it”** link as indicated below.



The screenshot shows the Event Dashboard with the Bookings tab selected. A table titled "Room Lists" is displayed with the following data:

Name	Status	Processed	Records	Initially / Last Uploaded
Staff.csv	Dropped Off	-	0	05/17/2011 05/17/2011
Test 1.csv <a href="#">Manage It</a>	Processed	03/29/2011	8	03/29/2011 03/29/2011

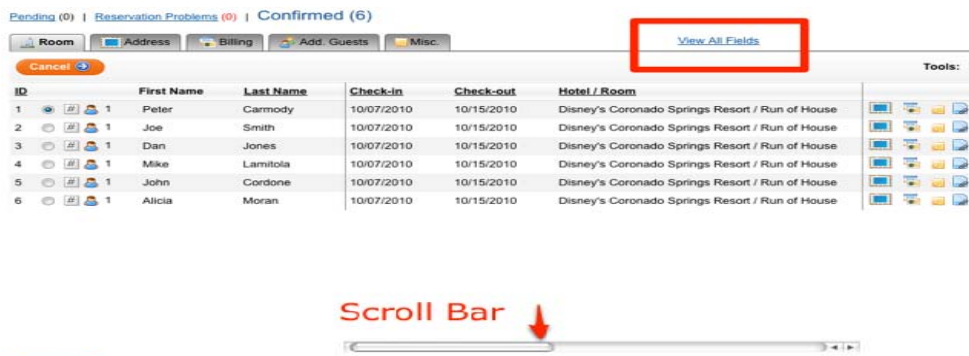
A red arrow points to the "Manage It" link for the "Test 1.csv" row. Below the table is a "Drop off a new list" button and "Results 1 - 2 of 2" text.

2. After selecting the **“Manage it”** link, a pop-up window will appear with two options, keep the **“Manage Room List Online”** option selected and then click on **Next**.



The screenshot shows a "Manage Room List" pop-up window with the title "Select an Option". Two radio button options are visible: "Manage room list online" (which is selected and highlighted with a red box) and "Download room list to make updates in Excel". At the bottom of the window are "Next" and "Cancel" buttons.

3. You will now be brought to a reservation screen listing your reservations. Initially, you will be presented with the basic reservation information (first and last name, dates, etc). To view all of the reservation information, select the **“View All Fields”** button indicated below in the box and use the scroll bar to navigate the page and view the data.



The screenshot shows a reservation screen with a table of reservations. A red box highlights the "View All Fields" button. Below the table is a scroll bar with a red arrow pointing to it.

ID	First Name	Last Name	Check-in	Check-out	Hotel / Room
1	Peter	Carmody	10/07/2010	10/15/2010	Disney's Coronado Springs Resort / Run of House
2	Joe	Smith	10/07/2010	10/15/2010	Disney's Coronado Springs Resort / Run of House
3	Dan	Jones	10/07/2010	10/15/2010	Disney's Coronado Springs Resort / Run of House
4	Mike	Lamitola	10/07/2010	10/15/2010	Disney's Coronado Springs Resort / Run of House
5	John	Cordone	10/07/2010	10/15/2010	Disney's Coronado Springs Resort / Run of House
6	Alicia	Moran	10/07/2010	10/15/2010	Disney's Coronado Springs Resort / Run of House

4. To modify reservations, double-click the information you would like to edit. This will activate the “**Change Field**” pop-up window. Simply enter the new information in this window and select the **Save** button to confirm your change. Click “**Show All Fields**” to make multiple changes to the reservation.



The image shows a pop-up window titled "Change Field" with a close button (red X) in the top right corner. The window contains the following elements:

- A label "Check-out" above a date input field containing "10/15/2010" and a calendar icon.
- A checkbox labeled "Send Acknowledgement" which is currently unchecked.
- A blue hyperlink labeled "Show all fields" on the right side.
- At the bottom, there are two buttons: an orange "Save" button with a floppy disk icon, and a grey "Cancel" button.