**CONTACT INFORMATION**

**Your Name:** Click or tap here to enter text.  
**Email:**  Click or tap here to enter text.  
**Phone:**  Click or tap here to enter text.

**EVENT DETAILS**

**Date of Submission:** Click or tap to enter a date. **Event Title:** Click or tap here to enter text.  
**Event Start Date:** Click or tap to enter a date.  
**Event End Date:** Click or tap to enter a date.  
**Est. Website Launch Date:** Click or tap to enter a date.

**Build Type:**  Choose an item.  
**Event to Copy:** Click or tap here to enter text.  
**Event Type:** Choose an item.   
**Security Type:**  Choose an item.  
**Event Capacity\*:**  Click or tap here to enter text.  
\* Enable waitlist once capacity is reached?  Yes  No

**Deadline to show invitees:** Click or tap here to enter text.  
**Form Close Date:** Click or tap to enter a date.   
**Form Close Time:** Click or tap here to enter text.

**Language(s):**  English  French  Spanish  
 German  Chinese   
 Other: Click or tap here to enter text.

**Appear in search engine results?**  Yes\*  No  
*\*Once turned on, this feature cannot be  
turned off. Only events open to the public   
should be visible to search engines.*

**Comments about event:** Click or tap here to enter text.

**WEBSITE DETAILS/GRAPHICS  
Header graphic** been requested?  Yes  No  
\*Please provide any additional graphics needed.

**Website Pages** Needed:  Summary/Home (required)  
  General Information  
  Agenda  
  Hotel  
  Air Travel  
  FAQs  
  Keynote Speaker  
  Contact Us  
  Registration Form  
  Other: Click or tap here to enter text.

**Countdown Timer** on Home page?  Yes  No  
**Video** on Home page?  Yes  No

**Social Media** links?  Yes\*  No  
\*If yes, which ones and URLs:  Facebook: Click or tap here to enter text.  
  Twitter: Click or tap here to enter text.  
  LinkedIn: Click or tap here to enter text.  
  YouTube: Click or tap here to enter text.  
  Instagram: Click or tap here to enter text.

**Website Content:**  
**Content document** is attached?  Yes  No

**Comments** about website details  
or graphics: Click or tap here to enter text.

**REGISTRATION DETAILS**

**Total number of registrations** expected? Click or tap here to enter text.  
When would you like to **open online registration**? Click or tap to enter a date.

**Types at attendees**:  Employees  
 Non-Employees  
 Clients  
 Prospects  
 Speakers  
 Staff  Other: Click or tap here to enter text.

Comments: Click or tap here to enter text.

Registrant Online **Modification** Deadline Date: Click or tap to enter a date.   
Registrant Online **Modification** Deadline Time: Click or tap here to enter text.  
Registrant Online **Cancellation** Deadline Date: Click or tap to enter a date.   
Registrant Online **Cancellation** Deadline Time: Click or tap here to enter text.

Allow attendees to **register others**  
after they’ve completed their own registration:  Yes  No

Allow an admin to **register on behalf of someone**?  Yes  No

Allow invitees to **invite others**?  Yes\*  No

\*If yes, can all invitees invite others or just certain ones? Click or tap here to enter text. **Registration Data** to Collect:

First and Last Name   
 Email Address  
 CC email address   
 Badge Name   
 Company   
 Title   
 Work Address   
 Home Address   
 Work Phone   
 Home Phone  
 Mobile Phone   
 Emergency Contact Name, Relationship & #  
 Branch Name   
 Department Name   
 Region  
 Division  
 Admin Name  
 Admin Email Address

Other Registration Data to collect: Click or tap here to enter text.  
Custom questions to ask registrants: Click or tap here to enter text.

Comments about Registration Details: Click or tap here to enter text.

**GUESTS**

Can attendees **bring a guest**?  Yes\*  No  
\*If yes, how many? Click or tap here to enter text.

What information would you like to **collect from guests**?

First & Last Name  
 Email Address  
 Badge Name  
 Company  
 Title  
 Address  
 Other: Click or tap here to enter text.

Additional information regarding guests: Click or tap here to enter text.

**OPTIONAL SESSIONS/ACTIVITIES**

Are there **optional sessions or activities to select**?  Yes  No\*  
*\*If no, skip to next section.*

**Information needed** for each session:   
Name, Date, Start Time, End Time, Description (optional), Location (optional), Capacity (optional)

**Session** Information: Click or tap here to enter text.

**PLANNER SESSION NOTIFICATIONS**  
Email address(es) to receive session alerts: Click or tap here to enter text.

Type of **Session Alerts** to receive:   
 Optional Session Close Date   
 Optional Session at Click or tap here to enter text. % capacity (usually 90%, 95% or 100%)

Comments about Sessions/Activities: Click or tap here to enter text.  
  
  
**HOTEL**

Will you **manage sleeping rooms** for this event?  Yes  No\*  
*\*If no, skip to next section.*

Is the **hotel required** for attendees?  Yes  No  
  
If **declines hotel**, ask additional questions?  Yes\*  No  
\*If yes, what questions?  Live Locally  Staying Elsewhere  
  Other: Click or tap here to enter text.

**Hotel Name**: Click or tap here to enter text.  
**Hotel Address**: Click or tap here to enter text.  
Hotel **Check-in/out time**: Click or tap here to enter text.  
**Room Block** details (list or attach to request): Click or tap here to enter text.  
Default **Check-in** Date: Click or tap to enter a date.  
Default **Check-out** Date: Click or tap to enter a date.  
Hotel offers **smoking rooms**?  Yes  No  
Ask **bedding preference**?  Yes\*  No  
\*If yes, list bedding options? Click or tap here to enter text.

**Additional question(s)** to ask hotel guests: Click or tap here to enter text.

Online **Hotel Modification** Deadline Date: Click or tap to enter a date.  
Online **Hotel Cancellation** Deadline Date: Click or tap to enter a date.

Allow check-in before/check-out after event?  Yes  No

**PLANNER HOTEL/ROOM BLOCK NOTIFICATIONS**  
Email address(es) to receive hotel alerts: Click or tap here to enter text.

**Type of Hotel Alerts** to receive:   
 Hotel Request Cancelled  Hotel Request Modified  
 Hotel Request Submitted   
 Hotel Block Night at Click or tap here to enter text. % capacity (usually 90%, 95% or 100%)

**AIR TRAVEL**

**Will travel information be collected/booked via registration?**  Yes  No\*  
*\*If no, skip to next section.*

Travel Form Type(s):  Air Request  Air Actual  Concur Travel

Allowed Flight Format(s):  Round-trip  One-Way  
Flight Time Format:  Time of Day  Specific Time  
Ask for Airline Preferences?  Yes  No

**Earliest Allowed Arrival** Date: Click or tap to enter a date.  
**Default Arrival** Date: Click or tap to enter a date.  
**Default Return** Date: Click or tap to enter a date.  
**Latest Allowed Return** Date: Click or tap to enter a date.

**Limit airport(s)** for arrival?  No  Yes, (list): Click or tap here to enter text.

Maximum allowed for air travel ($): Click or tap to enter a date.

Approval needed from planner to exceed maximum allowed?  Yes  No

**PLANNER AIR NOTIFICATIONS**Email address(es) to receive air alerts: Click or tap here to enter text.

Type of **Air Request Alerts** to receive: (Note, there are no alerts for Air Actuals or Concur Travel)   
 Air Request Cancelled  Air Request Modified  
 Air Request Submitted

**Comments** about Air Travel section: Click or tap here to enter text.

**REGISTRATION SURVEYS**

**Ask questions if they cannot attend?**  Yes  No  
If yes, **which questions** would you like to ask? Click or tap here to enter text.

**Ask questions if they want to cancel their registration?**  Yes  No  
If yes, **which questions** would you like to ask? Click or tap here to enter text.

**Comments** about surveys: Click or tap here to enter text.

**POST EVENT SURVEY**

Will this event have a **post-event survey**?  Yes  No\*  
*\*If not, skip to next section.*

Will the survey be **created in Cvent?**  Yes  No\*  
*\*If not, will we simply be sending an email for it?*  Yes  No

**Date** to send survey invitations: Click or tap to enter a date.  
**Time** to send survey invitations: Click or tap here to enter text.

Comments about the Post-Event Survey: Click or tap here to enter text.

*Please attach post-event survey questions and email content (or send once you have them).*

**INVITEE EVENT COMMUNICATIONS**

How will invitees be directed to the website  Email via Cvent  
to register? (Check all that apply)  URL on a webpage  
  Email sent outside of Cvent

**“From” name** for email communications: Click or tap here to enter text.  
**“From” email address** for email communications: Click or tap here to enter text.

Which emails to attendees will be needed for this event?

|  |  |  |
| --- | --- | --- |
|  | **Email Name** | **Estimated Send Date and Time** |
|  | Save the Date Email | Date: Click or tap to enter a date. Time: Click or tap here to enter text. |
|  | Invitation Email\* | Date: Click or tap to enter a date. Time: Click or tap here to enter text. |
|  | Invitation Reminder | Date: Click or tap to enter a date. Time: Click or tap here to enter text. |
|  | Registration Confirmation | (Sent automatically when someone registers) |
|  | Cancellation Confirmation | (Sent automatically when someone cancels) |
|  | Regret Confirmation | (Sent automatically when someone declines to attend) |
|  | Modification Confirmations | (Sent automatically when someone updates their registration) |
|  | Abandoned Registration (usually turned on for each event) | (Sent automatically when someone begins registration but doesn’t complete it) |
|  | Event Reminder/Day Of/Know Before You Go | Date: Click or tap to enter a date. Time: Click or tap here to enter text. |
|  | Click or tap here to enter text. | Date: Click or tap to enter a date. Time: Click or tap here to enter text. |
|  | Click or tap here to enter text. | Date: Click or tap to enter a date. Time: Click or tap here to enter text. |

\*Invitee list should include separate columns for first name, last name, and email address. Additional columns can be included and can be used for reporting only (won’t show to invitees).

**Approximate date invitee list will be sent to web builder**: Click or tap to enter a date.

Please attach the content for all emails selected above.

Comments about attendee email communications/invitee list: Click or tap here to enter text.

**PLANNER ALERTS/NOTIFICATIONS**

These are notifications that can be sent automatically by Cvent to an email address that you specify.

|  |  |  |
| --- | --- | --- |
|  | **Email Name** | **Sent To** |
|  | Event End Date | Email Address(es): Click or tap here to enter text.  Trigger:  Day of  # of days after: Click or tap here to enter text. |
|  | Event Capacity | Email Address(es): Click or tap here to enter text.  Trigger at:  95%  99%  100%  Other: Click or tap here to enter text. |
|  | Event Registration Deadline | Email Address(es): Click or tap here to enter text.  Trigger:  Day of  # of days before: Click or tap here to enter text. |
|  | Question Responded (Sent whenever a question receives a response, or its previous response is updated. In most cases, the previous response will be included) | Email Address(es): Click or tap here to enter text.  Trigger Question: Click or tap here to enter text.  Trigger Answer: Click or tap here to enter text. |
|  | Registrant(s) Checked In (OnArrival or Kiosk Mode) | Email Address(es): Click or tap here to enter text. Registrant Name(s): Click or tap here to enter text. |
|  | Registration Accepted | Email Address(es): Click or tap here to enter text. |
|  | Registration Cancelled | Email Address(es): Click or tap here to enter text. |
|  | Registration Declined | Email Address(es): Click or tap here to enter text. |
|  | Registration Modified (Sent whenever a registration is modified. Not sent when contact information is updated) | Email Address(es): Click or tap here to enter text. |
|  | Registration Waitlisted | Email Address(es): Click or tap here to enter text. |
|  | Optional Session Capacity | Email Address(es): Click or tap here to enter text.  Trigger at:  95%  99%  100%  Other: Click or tap here to enter text. |
|  | Optional Session Close Date | Email Address(es): Click or tap here to enter text.  Trigger:  Day of  # of days before: Click or tap here to enter text. |

**REPORTS**

Standard Reports will include:

|  |  |
| --- | --- |
| **Email Name** | **Allow to access the report** |
| Invitee Status Report (if applicable) | Email Address(es): Click or tap here to enter text. Schedule or pull on-demand?  Schedule\*  On-demand \*If schedule, how often? Click or tap here to enter text. |
| Master Registration Report | Email Address(es): Click or tap here to enter text.  Schedule or pull on-demand?  Schedule\*  On-demand \*If schedule, how often? Click or tap here to enter text. |
| Rooming List Report (if applicable) | Email Address(es): Click or tap here to enter text.  Schedule or pull on-demand?  Schedule\*  On-demand \*If schedule, how often? Click or tap here to enter text. |
| Air Report (if applicable) | Email Address(es): Click or tap here to enter text.  Schedule or pull on-demand?  Schedule\*  On-demand \*If schedule, how often? Click or tap here to enter text. |
| Email Status Report | Email Address(es): Click or tap here to enter text. Schedule or pull on-demand?  Schedule\*  On-demand \*If schedule, how often? Click or tap here to enter text. |

Optional reports you’d like to have created:

|  |  |  |
| --- | --- | --- |
|  | **Email Name** | **Allow to access the report** |
|  | Name Tag Report (if applicable) | Email Address(es): Click or tap here to enter text. |
|  | Meal Preferences Report (if applicable) | Email Address(es): Click or tap here to enter text. |
|  | Emergency Contact Report (if applicable) | Email Address(es): Click or tap here to enter text. |
|  | Other: Click or tap here to enter text. | Email Address(es): Click or tap here to enter text. |
|  | Other: Click or tap here to enter text. | Email Address(es): Click or tap here to enter text. |
|  | Other: Click or tap here to enter text. | Email Address(es): Click or tap here to enter text. |
|  | Other: Click or tap here to enter text. | Email Address(es): Click or tap here to enter text. |