**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. |
|[x]  Registration Confirmation | (Sent automatically when someone registers) |
|[x]  Cancellation Confirmation | (Sent automatically when someone cancels) |
|[x]  Regret Confirmation | (Sent automatically when someone declines to attend) |
|[ ]  Modification Confirmations | (Sent automatically when someone updates their registration) |
|[x]  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. |