GroupMAX
powered by Passkey

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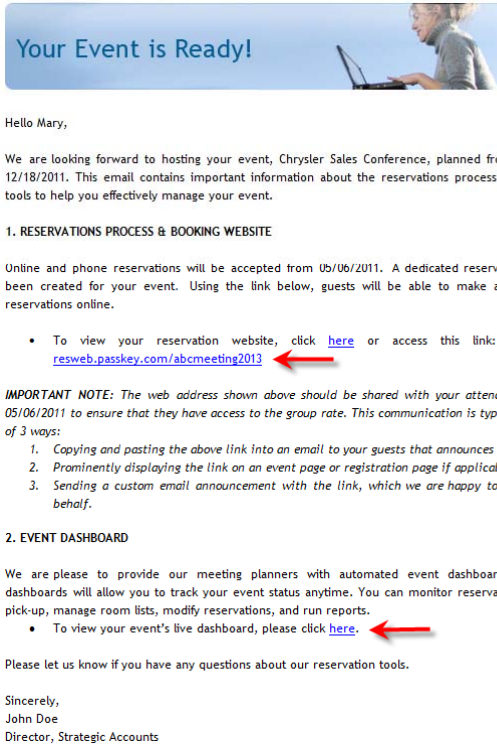
Please note that introduction letters' content and format may vary.

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:
Susan

* Phone:
702-489-5690

* Last Name:
Jones

Confirm your contact information

Account Credentials

* Username:

* Password:

Create your username, password and security questions

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

* Confirm Password:

* Security question 1:
Select a security question:

* Answer:

* Security question 2:
Select a security question:

* Answer:

☐ I agree to the Terms of Use

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.

HELPFUL HINTS
Be sure to save the dashboard login page to your "favorites" to easily access your dashboard.

Dashboard Information

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.

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.
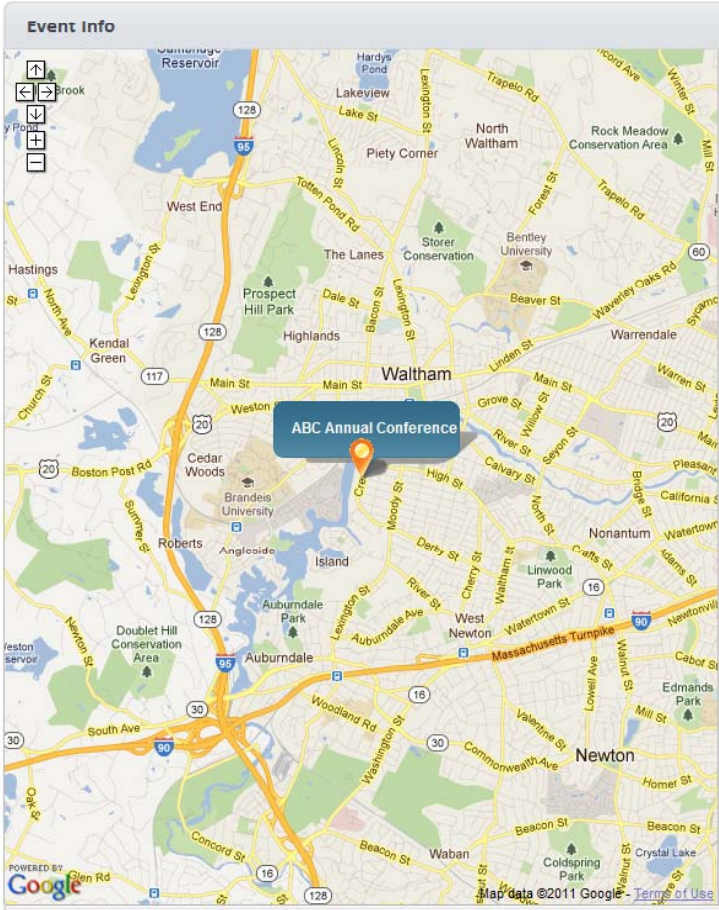
Bookings tab

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.

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.

Reports can be filtered to include specific information such as: hotel and room type. Column headers on the Delegate Report can 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.

Communications tab

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

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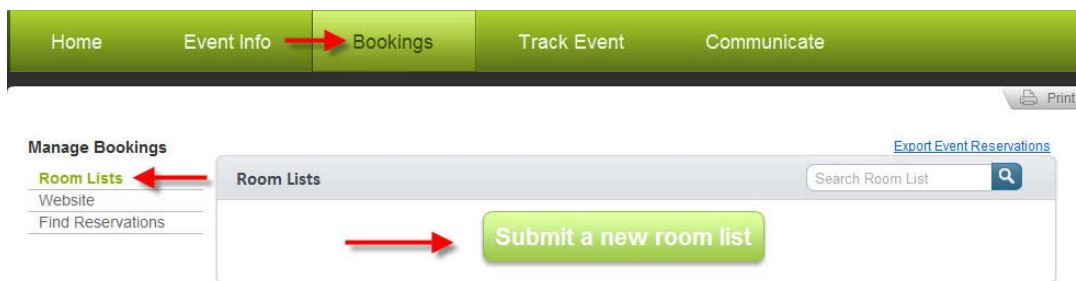
2. Click the **Browse** button to upload your list:

MANAGING ROOM LISTS

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

Submit a room list

Helpful Hints
- If the housing manager provided you with a mapping template to use, we strongly recommend using that template.
- Your room list file must be in Excel 1997-2010 (.xls or .xlsx), or in CSV format.

#1 * Select a File: `C:\fakepath\Sample RLX list - December Da` Browse

#2 * Attendee Type: `Select a type` ▼ **#3** Column headers are on row number: `_____`

* List name: `Sample RLX list - December Date` **#4** What is the date format used in your room list? `Select a format` ▼

Room List Notes

`[                    ]`

Guest Notification Emails

#5 ☐ 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.

Cancel   **Submit**

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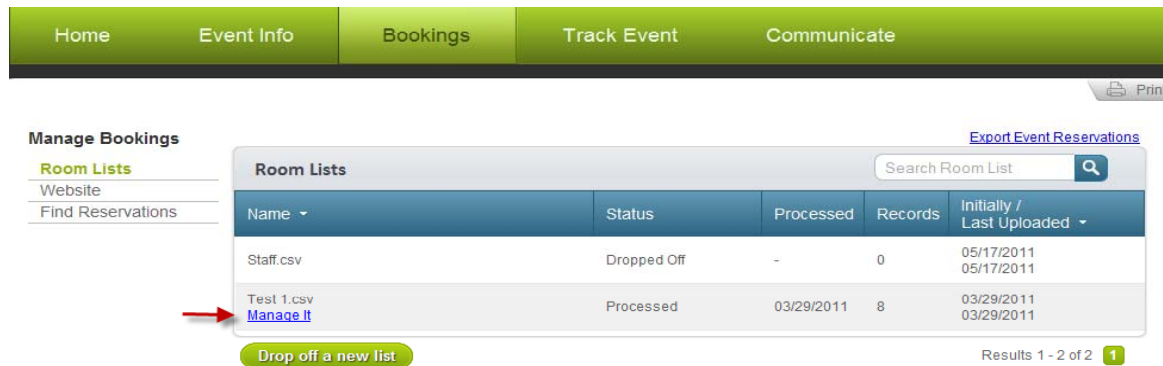
4. Select the **Submit** button after completing the form. You will receive a notice in the window that your list has been successfully submitted, and the hotel will be notified that your room list is ready to be processed.

Submit a room list

Your file has been submitted to the event organizer for processing

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.

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**.

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.

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.

Change Field

Check-out

10/15/2010

☐ Send Acknowledgement   Show all fields

Save   Cancel