

Cvent Feature Checklist

*This is a complete feature list. Features available in a license will vary based on the Event Management version chosen (Professional or Enterprise). Several of the advanced features and integrations listed below are NOT included in either Professional or Enterprise version and may be elected by licensee.

Features

Cvent

Online Event Registration

- | | |
|--|---|
| Create online registration processes for events of all sizes and types | ✓ |
| Pre-populate contact information on registration forms | ✓ |
| Host event websites and entire registration processes in any language | ✓ |
| Designate required input fields | ✓ |
| Automated wait list | ✓ |
| Restrict registration to those contacts on the invitation list | ✓ |
| Option to password protect registration process | ✓ |
| Encourage registrants to forward invitations to colleagues, friends and family during registration | ✓ |
| Allow registrants to sign up guests | ✓ |
| Permit bulk registration of a group all at once | ✓ |
| Support registrant upload of presentations, abstracts, biographies, or other documents | ✓ |
| Create dynamic registration paths based on contact type, such as exhibitor, attendee, or speaker | ✓ |
| Accept registrant modifications or cancellations up until specified dates | ✓ |

Agenda and Session Management

- | | |
|--|---|
| Build dynamic, multi-track, multi-session registration paths | ✓ |
| Create either included or optional sessions | ✓ |
| Limit selection of sessions/activities to specific invitee segments | ✓ |
| Decide if overlapping sessions can or cannot be selected | ✓ |
| Ask registrants conditional questions only after sessions are chosen | ✓ |
| Deliver post-event questions only to attendees of specific sessions | ✓ |
| Automate emails of session registrant lists to instructors or presenters | ✓ |
| Allow instructor or presenter to easily submit attendance status | ✓ |
| Import sessions details from Excel | ✓ |
| Add session descriptions (both text and HTML options) | ✓ |
| Clone or copy sessions and registration paths within an event | ✓ |
| Set registration rules such as minimum number of required sessions | ✓ |
| Allow registrants to add event and/or sessions to Outlook calendar | ✓ |
| Opt to automatically close an event or session when it reaches capacity | ✓ |
| Automate waitlists per session | ✓ |
| View alerts regarding proximity to session capacity | ✓ |

On-Site Event Registration

- | | |
|--|---|
| Manage on-site registration as logged-in staff user | ✓ |
| Print name badges, attendee lists, and sign-in sheets on-site | ✓ |
| Create and print personal agendas, confirmations, and invoices on-site | ✓ |
| Collect and process credit card payments securely in person | ✓ |
| Facilitate self check-in or brand new registrations via on-site kiosks | ✓ |
| Enable registrants to self-produce badge, invoice, agenda, etc. | ✓ |

Event Surveys

Pre-registration surveys	✓
Post-event surveys for attendees	✓
Cancellation surveys for cancelled registrations	✓
Regret surveys for declined invitees	✓
Create questions with advanced logic	✓
Ask sub-questions based on survey question responses	✓
Gather feedback from attendees before the event is completed	✓
Import answer values from Excel	✓

Email Marketing

Create, save and re-use email templates	✓
Customize email templates to match organizational branding	✓
Send emails in HTML or plain text	✓
Use 80+ mail-merge data tags, such as name and company, to personalize emails	✓
Utilize invitation design module to create email invite (175+ templates)	✓
Choose "Sent from" name per email to ensure higher open rates	✓
Customize "Reply to" email address	✓
Tailor messaging to unlimited targeted lists	✓
Pre-set and customize 15+ emails for each defined target list	✓
Send emails based on registration status such as Undecided, Accepted, Attended, or No-show	✓
Set invitation reminders to repeat every X days for unresponsive invitees	✓
Automate payment confirmation, receipts, and invoice emails	✓
Activate trigger-based cancellation and regret emails	✓
Schedule specific dates/times for every email within a campaign	✓
Send email invitations, invite reminders, registration confirmations, and post-event thank-you's	✓
Deliver confirmations and notifications to guests of registrants	✓
Automatically copy an administrative assistant on all emails to registrant	✓
Easily re-send confirmations, itineraries, or personal agendas	✓
Drop barcodes into emails for scanned check-in	✓
Insert question response values into emails	✓
Create session-specific email reminders	✓
Save favorite email templates for easy re-use	✓
Run email content analysis tool to avoid being marked as spam	✓
Track email delivery rates and open rates	✓
Comply with CAN-SPAM Act with one-click opt-out option	✓

Secure Payment Collection & Processing

Offer five tiers of early-bird discounts	✓
Establish promotion codes/coupons with expiration dates and capacity limits	✓
Automate volume discounts for group registration	✓
Provide dynamic registration pricing based on contact types	✓
Accept donations in amounts chosen by registrant	✓
Offer purchase of optional items such as books, shirts, or tickets	✓
Allow registrants to send partial payments, or choose to accept only complete payments	✓
Automate refunds according to custom refund policy	✓
Real-time credit card processing	✓
Accept payments from Visa, MasterCard, Discover, and American Express	✓
Present options for payment by check or purchase order	✓
Permit upload of actual purchase order on payment page	✓
Accept payments in international currencies	✓
Set tax rates and service fees	✓
Elect to delay processing of credit card to a later time	✓
Track payments made outside Cvent	✓
Connect to an existing merchant account or acquire a new merchant account	✓
Quickly process payments via a Cvent supplied e-commerce gateway account	✓
Choose gateway: Verisign Payflow Pro, PayPal Express, Cybersource, Pay.gov, Touchnet, or Moneris	✓
Direct deposit of all payments into planner's merchant account	✓
Receive automatic notification of failed transactions	✓
Assign general ledger (GL) codes to event fees for easy integration to accounting platform	✓
Safely process fees via Payment Card Industry (PCI) compliant provider	✓

Travel & Housing Management

Collect hotel, flight, and car rental requests	✓
Ask custom questions on travel request forms	✓
Automate email notification for travel requests and modifications	✓
Gather additional information such as seating preference	✓
Block off rooms for attendees based on negotiated room blocks	✓
Monitor room blocks across all properties in real-time	✓
Show different property and room options based on contact type	✓
Track and manage roommate requests and roommate matching	✓
Mandate input of credit card information for hotel reservations	✓
Charge registrants for hotel rooms based on negotiated daily rates	✓
Collect departure and arrival requests	✓
View registrant travel request history	✓
Import registrant flight details	✓
Track booked flight details in Cvent and easily execute airport pick-up and transfer schedules	✓

Features	Cvent
Personalize itineraries, directions, and confirmations	✓
Grant hotels or travel agents access to relevant reports	✓
Integrate directly with a property that is Passkey-enabled	✓
Pass a registrant directly into online travel booking tools such as GetThere or CliqBook	✓

Attendee Management

Register attendees on the back-end by phone, fax, or mail	✓
Find invitees quickly with advanced search	✓
Design and print name badges with barcodes	✓
Create mailing labels	✓
Produce certificates	✓
Designate table assignments	✓
Award credits for event or session attendance	✓
Enter discounts for individual attendees manually	✓
Issue full or partial refunds manually	✓
Substitute registrations	✓
Manually mark participant status when an event ends	✓
Upload attendance list at overall event level or session level	✓
Manage internal notes per attendee	✓
Pull event and session attendee lists for event staff	✓

Custom Event Websites

Translate the entire event website and registration process into any language; built-in translation of default buttons to French, Spanish and German	✓
Choose from 60+ event website design templates	✓
Produce custom event websites to match organizational branding (no HTML knowledge required)	✓
Design custom pages regarding speakers, agenda, fees, travel, etc.	✓
Customize event website header and footer	✓
Optionally secure event website by requiring a password to view the content	✓
Social networking integration with the major networks (Facebook, Twitter, LinkedIn, etc) to allow registrants to instantly market event for you	✓
Link your event websites to your organization's Twitter page, Facebook page and RSS feeds	✓
Configure event URL to include organization and event name	✓
Display dates and times in US or international formats	✓
Designate time zone format	✓
Upload and share key documents for online viewing	✓
Promote event sponsors on event website	✓
Include links to related websites	✓
Offer driving directions to registrants with MapQuest integration	✓
Track registrations coming from partners' websites (with Reference IDs)	✓
Post a live event website the instant event is launched	✓
Design and host calendar view of multiple upcoming events	✓



Features

Cvent

Contact Management

Store all contacts in one place	✓
Import contacts from virtually any source including Excel and Access	✓
Match imported contact records based on email address or a your own unique field	✓
Unlimited contact importing	✓
Utilize Application Program Interface (API) to integrate Cvent address book with external databases	✓
Enable contacts to update their own information	✓
Create custom contact groups	✓
Collect all necessary contact information with custom contact fields	✓
Merge duplicate contacts into one contact record	✓
Advanced address book search	✓
Segment contact database on specific criteria	✓
View detailed contact activity history	✓
Track accumulated credits for continuing education	✓
Check audit history per contact (date/time stamp of who created or modified contact)	✓
Export contact information to use outside of Cvent	✓
Control database visibility based on user permissions	✓

Administrative and Workflow Tools

Multi-user access with defined user rights	✓	
Validate event before launch	✓	
Assign event launch approval rights to specific users only	✓	
Set up email alerts for situations based on events or session capacities, transactions, waitlists, hotel room requests and other potential occurrences within your events	✓	
Control visibility of events, contacts, and RFPs based on user	✓	
Customize views of event list	✓	
Create customized event and session attribute fields	✓	
Build internal calendar for all events	✓	
Utilize filters to configure tailored calendar views for planners	✓	
Centralized custom question library	✓	
Manage graphics and document libraries	✓	
Customize dashboards for top-level view of event and contact data	✓	
Delegate tasks and projects to staff	✓	
Manage staff tasks with automated reminders and notifications	✓	
Track staff completion of assigned tasks and subtasks	✓	
Easily convert financial data from different currencies to a base currency for accounting purposes	✓	
Integrate with Webex Account		✓
Integrate with Salesforce.com Account		✓

Features

Cvent

Reporting

100+ standard event-level reports in one click	✓
Create unlimited custom reports	✓
Run standard reports in one-click	✓
Analyze email campaign success	✓
Measure and aggregate key event metrics with cross-event reports	✓
View contact reports to track contact aggregate activity	✓
Run administrative-level reports	✓
Save reports with pre-selected criteria	✓
Park reports on branded web pages for external users to view in real-time	✓
Use colorful charts and graphs to make reports presentation-ready	✓
Export reports in six formats: Excel, PDF, XML, CSV, TIFF, and Web Archive	✓
Favorite your most commonly used reports for quick access	✓

Budget Management

Build event budgets based on fixed costs, variable costs, or a combination	✓
Quick and easy entry of budget costs and vendor information	✓
Monitor budget by categories and sub-categories	✓
Calculate tax and gratuity and other often overlooked expenses	✓
Track costs for each session	✓
Overview of vendor payment and transaction history	✓
Track budgeted, negotiated, and actual expenses	✓
Leverage budget information to negotiate lower costs with vendors	✓
Analyze average cost per attendee	✓
Calculate total meetings spend per business unit	✓
Generate reports of spending and revenue trends	✓
Produce executive summary of event costs compared to revenue	✓
Create customized dashboard views of budget data	✓

Meeting Site Selection & Sourcing Tools

Research worldwide meeting city options via the Cvent Destination Guide	✓
Search database of over 125,000 event venues and service providers	✓
Browse venues in over 165 countries	✓
Apply advanced criteria on supplier searches to filter results	✓
Choose to filter by chain affiliation, number of sleeping rooms, meeting space size, amenities, etc.	✓
Search for venues based on their proximity to other locations (e.g., hotels close to a convention center)	✓
View image galleries and take virtual tours of properties	✓
Benefit from exclusive venue promotions	✓
Bookmark preferred venues and service providers	✓

Features	Cvent
Calculate meeting room needs based on size, attendees, and set-up	✓
Pre-populate organization information when creating Requests for Proposals (RFPs)	✓
Upload, view, and track rate history for individual properties and chains	✓
Save supplier history to leverage in future negotiations	✓
Add key contact information for properties and chains	✓
Create RFPs in compliance with APEX (Accepted Practices Exchange)	✓
Control RFP creation and submission based on user role	✓
Attach custom documents to RFPs	✓
Incorporate custom questions in RFPs	✓
Save frequently-asked questions in question library	✓
Include 24-hour hold on meeting rooms	✓
Use SI to Metric converter for international RFPs	✓
Specify international currencies	✓
Brand RFPs with organizational logos and images	✓
Send RFPs on behalf of multiple organizations	✓
Deliver RFPs to multiple suppliers at once	✓
Track RFPs in real-time	✓
Automated notifications on RFP status	✓
Compare bids from multiple suppliers side-by-side	✓
Generate comprehensive side-by-side bid reports in Excel	✓
Send responses to supplier proposals in one-click	✓
Clone or copy past RFPs	✓
Monitor budget items by category	✓
Use advanced reporting tools to compare and contrast budget data	✓

Client Support	
User-friendly interface to create events quickly and easily	✓
24 hour live phone support 7 days a week	✓
Phone and email support	✓
90% of calls answered in under 90 seconds	✓
Dedicated relationship manager	✓
Nothing to install, download, or update	✓
Unlimited, free online training	✓
Live webinar training sessions held daily	✓
Pre-recorded training videos available	✓
Complimentary pre-launch event consultation	✓
Option for full-service event creation and design team (Event Builder)	✓
Instant access to new features and upgrades	✓
Consistent mails with event management best practices and market trends	✓

Features

Cvent

Data Security

Data is hosted in a top-tier, world-class data center	✓
24x7 on-site security guard	✓
Secure and redundant web and database servers	✓
Payment Card Industry (PCI) level 1 compliant	✓
Triple DES encryption for storage of sensitive data	✓
Credit card number encryption	✓
No unscheduled downtime in 11 years	✓
Hourly backups of customer data	✓

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