

Event Marketing and Management Feature List



Event Registration

- Create online registration processes for events of all sizes and types
- User-friendly interface to create events quickly and easily
- Collect registration for in person, virtual, or hybrid events
- Create dynamic registration paths based on contact type, such as exhibitor, attendee, or speaker
- Mobile-optimized registration form
- Flexible registration designer to create a simple, single-page registration, or a multi-page registration process
- Pre-populate contact information on registration forms
- Embed registration forms on external websites
- Allow invitees to add themselves to an event or session waitlist
- Send automated emails to waitlisted attendees based on attendee type or on a first come, first served basis
- Restrict registration to only those contacts on the invitation list
- Option to password protect registration process
- Allow registrants to sign up guests
- Permit bulk registration of a group all at once
- Permit administrators to register and manage registration on behalf of attendees
- Support registrant upload of documents, such as presentations or biographies
- Accept registrant modifications or cancellations up until specified dates
- Host registration processes in 30+ different languages
- Create multiple language event registration processes
- Offer session bundles to streamline registration and/or offer discounted pricing for a group of sessions

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Administrative and Workflow Tools

- Multi-user access with defined user rights and visibility
- Set email alerts for registrations, transactions, waitlists, travel requests, capacity limit reached, etc.
- Customize views of event list
- Create customized event and session attribute fields
- Build internal calendars for all events and/or specific events
- Manage admin-level libraries for media, documents, questions, etc.
- Organize and manage speaker profiles with a speaker library
- Validate and approve event before launch
- Work in the planner user interface in 18 different languages
- Delegate tasks to staff and track completion*
- Manage staff tasks with automated reminders and notifications*
- Customizable meeting request forms to capture all event related information*
- Maintain an inventory of resources and manage within events, sessions, and your organization †
- Integrate with Zoom † | 
- Integrate with Webex † | 
- Integrate with Salesforce † | 
- Integrate with Marketo † | 
- Integrate with Eloqua † | 
- Integrate your database/system with Cvent using API or Webhooks †

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Agenda and Session Management

- Build dynamic, multi-track, multi-session registration process
- Create registration items as well as included or optional sessions
- Allow registrants to search for sessions using custom search filters
- Allow registrants to build their agendas during registration or post-registration
- Ask registrants conditional questions only after sessions are chosen
- Deliver post-event questions only to attendees of specific sessions
- Associate speakers to sessions to showcase on event website
- Set registration rules, such as minimum number of required sessions or overlapping sessions
- Import sessions details from Excel
- Update session information in bulk within the system
- Allow registrants to add event and/or sessions to Outlook calendar (among other options)
- Opt to automatically close an event or session when it reaches capacity
- Limit selection of sessions/activities to specific invitee segments
- Automate waitlists per session
- Receive alerts regarding proximity to session capacity
- Import session registrations or modifications from Excel
- Create and associate resources to be used for a specific session †

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Attendee Management

- Register on behalf of attendees on the backend
- Find invitees quickly with advanced search
- Search for invitees who abandoned registration and automate follow-up emails
- Design and print name badges with barcodes and QR codes
- Create mailing labels, invoices, tickets, and certificates
- Allow attendees to print versions of invoices through their email or registration confirmation page
- Issue full or partial refunds manually
- Substitute registrations on the backend
- Allow registrants to substitute their own registration on their confirmation page
- Produce certificates inclusive of credits earned
- Designate table and seating assignments
- Award credits for event or session attendance
- Automatically award credits based on attendance captured through OnArrival



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Budget Management

- Build event budgets based on fixed and variable costs*
- Quick and easy entry of budget costs and vendor information*
- Create budget policies to ensure compliance and for accurate reporting*
- Modify expenses in an Excel-like bulk edit*
- Monitor budget by categories and sub-categories*
- Design customized budget templates to ensure consistency*
- Calculate tax and gratuity and other often overlooked expenses*
- Track costs for each session*
- Track budgeted, negotiated, and actual expenses*
- Calculate total meetings spend per business unit*
- Create a multi-currency budget and convert budget data to base currency in reports*
- Generate reports of spending and revenue trends*
- Create customized dashboard views of budget data*
- Create different versions of your budget*
- Integrate with Concur Expense to receive expense data from transient travelers and meeting planners †
- Integrate with AMEX or CITI Card Accounts to generate virtual card numbers and receive/track subsequent expense data †

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Contact Management

- Store all contacts in one central database
- Import up to 50,000 contacts at once from Excel or CSV
- Match imported contact records based on email address or your own unique field
- Enable contacts to update their own information during registration
- Create custom contact groups to segment contact database
- Collect and store all necessary contact information with custom contact fields
- Merge duplicate contacts into one contact record
- Advanced address book search
- View detailed contact activity history and change history reports
- Check audit history per contact (date/time stamp of who created or modified contact)
- Export contact information to use outside of Cvent
- Contact website for contacts to manage their profile, view past event attendance, and access current and future events
- Track accumulated credits for continuing education
- Control database visibility based on user permissions
- Utilize Application Program Interface (API) to integrate Cvent address book with external databases †
- Manage member activity including new memberships, renewals, and expirations †
- Online portal for members where they can login to view and manage their profile, purchase memberships, and network with other members †

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Event Marketing

- Send invitations, reminders, registration confirmations, and post-event emails
- Create, save, and re-use email templates
- Customize email templates to match organizational branding
- Use mail-merge data tags, such as name, company, and any custom fields, to personalize emails
- Choose "Sent from" name per email to ensure higher open rates
- Customize "Reply to" email address
- Tailor messaging to unlimited targeted lists
- Send emails based on registration status such as undecided, accepted, attended, no-show, etc.
- 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
- Automatically copy an administrative assistant on all emails to registrants
- Easily re-send confirmations, itineraries, or personal agendas
- Drop QR codes into emails for onsite check-in
- Create session-specific emails
- Track email delivery rates, open rates, and click-through rates
- Comply with CAN-SPAM Act with one-click opt-out option
- Send email newsletters, promotions, announcements, and other communications †
- Select from 100+ standard email templates †
- Create distribution lists to segment contacts into different audiences †
- Create unlimited campaigns geared towards different topics and/or audiences †
- Allow email recipients to manage list subscriptions and update contact information †
- Permit recipients to forward emails to colleagues who may be interested in subscribing †

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Event Surveys

- Pre-registration surveys
- Post-event and session feedback surveys for attendees
- Cancellation surveys for cancelled registrations
- Regret surveys for declined invitees
- Create questions with advanced logic and sub-questions
- Ask different questions for different sessions †
- Show specific surveys or questions to targeted groups of attendees †
- Option to automatically repeat the same feedback questions across any number of speakers †
- Display speaker images and names in the survey †
- Score survey responses by assigning points to choice-based questions †
- Auto-award event or session credits upon completion of survey or passing score †
- Enhanced survey data and reporting across events, sessions and speakers †
- Standardize survey questions and templates†
- Leverage data tags and logic to automatically populate event details in surveys†
- Use on survey for any number of events to capture a baseline measurement†

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Event Websites

- Produce custom event websites to match organizational branding (no HTML knowledge required)
- Customize pre-existing website themes and save your own custom themes
- Design custom pages regarding venue information, photo gallery, sponsors, etc.
- Mobile-responsive event websites with device preview
- Optionally secure event website by requiring a password to view the content
- Social networking integration to allow registrants to market your event on Facebook, Twitter, or LinkedIn
- Track the traffic of event website, registration pages, and ecommerce using Google Analytics integration
- Integrate with lead and conversion tracking tools using Custom Code Snippets
- Track registrations coming from external links and/or partners' websites with Reference IDs
- Track registrations coming through social shares
- Host event websites in 30+ different languages
- Create multiple language event websites
- Design and host calendar view of upcoming events
- Custom footer on website and registration pages †
- Configure event URL to include organization and event name †

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Onsite Check-In and Attendance Tracking

- Mobile app designed to check in and register new attendees while onsite
- QR Code/Badge scanning to check in or search for the registrant in a list
- Charge credit cards or record offline payments
- Sell additional items and collect donations onsite
- Real-time dashboard reporting within the app for planners
- Functional online and offline
- Compatible with iOS devices (12 and higher) and Android (7.0 and higher)
- Apple Watch support for real-time check-in and registration counts
- OnArrival automatically detects the language of the onsite staff's devices and changes the user interface accordingly. Supports English, French, German, Italian, Portuguese (European), Chinese (Simplified), and Spanish
- Session tracking and access control †
- Kiosk mode for a self-service check-in option †
- Onsite badge printing †
- Options for signature collection, photo collection and onsite terms & conditions during the check-in process †
- SMS alerts to an attendee's device or to notify when someone checks in †
- Full-service onsite attendance management solution †
- Project Manager for end-to-end planning and support of your event †
- Inclusive of software, badges & supplies, hardware & devices and support †

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Payment Collection and Processing

- Real-time credit card processing
- Establish discount codes 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
- Accept only complete payments or allow registrants to make partial payments
- Automate refunds according to custom refund policy
- Offer five tiers of early-bird discounts
- Accept payments from Visa, MasterCard, Discover, American Express, and Diners Club
- Present offline payment options, such as check, purchase order, invoice, pay onsite, etc.
- Accept payments in an international currency
- Set tax rates and service fees
- Charge location-based taxes to relevant attendees
- Offer payment credits in lieu of issuing refund
- Track offline payments made outside of Cvent
- Connect to an existing merchant account or acquire a new merchant account
- Quickly process payments via a Cvent supplied ecommerce gateway account
- Compatible payment gateways: Verisign Payflow Pro, PayPal Express, Cybersource, Pay.gov, Touchnet, Moneris, Stripe, Ogone, CASHNet, or Authorize.net (AIM or SIM)
- Direct deposit of all payments into planner's merchant account
- Opt to have Cvent collect payment on your behalf using Payment Services
- Safely process fees via Payment Card Industry (PCI) compliant provider

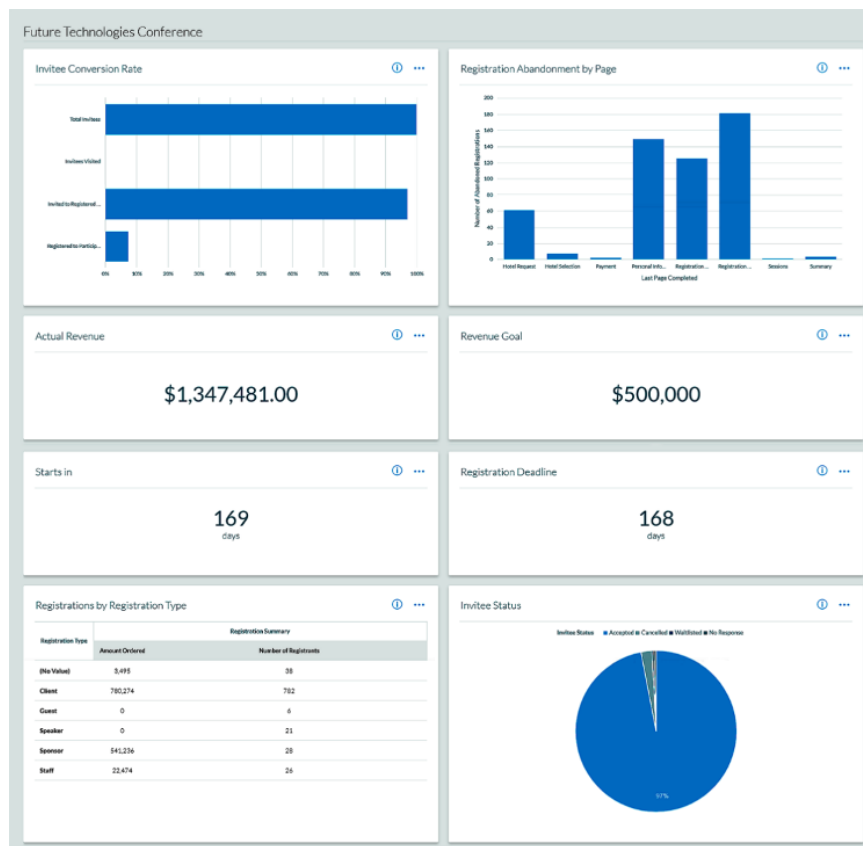
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Reporting

- Highly configurable out-of-the-box reports across a variety of categories
- Visualize event data with charts and graphs that showcase key metrics
- 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 for quick access
- Export reports to Excel or CSV
- View quick snapshots and summarized data related to registrations, responses, agenda items, etc.
- Publish reports to a single portal to share real-time data with key stakeholders



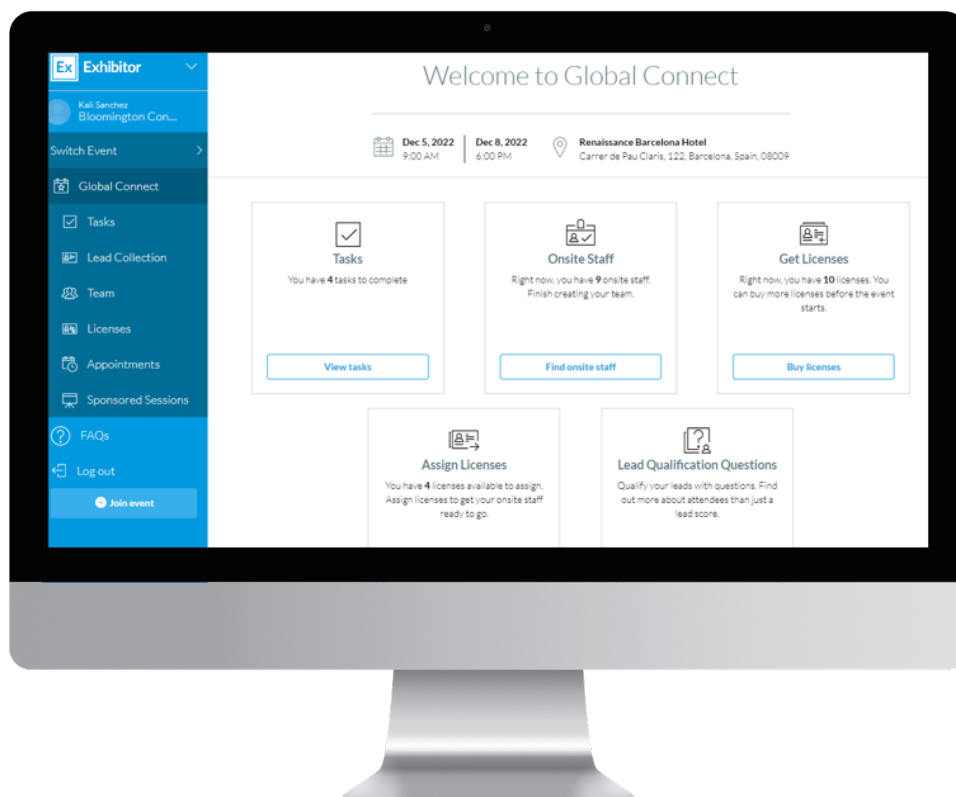
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Speaker and Exhibitor Management Tools

- A self-service portal for speakers to access all of their speaker details and content
- Designed for planners to streamline speaker communications and collaborate on logistics and content
- Assign tasks and send key emails to speakers
- A self-service portal for Exhibitor Admins to manage all their exhibitor details and content
- Allow Exhibitor Admins to manage their booth staff registration
- Assign tasks and send key emails to exhibitors
- Provide access to real-time reporting
- Manage LeadCapture license purchases or device rentals, as well as exhibitor appointments †



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Travel and Housing Management

- Collect hotel, flight, and car rental requests*
- Ask custom questions to gather additional information on travel request forms*
- Automate email alerts for travel requests and modifications*
- Block off rooms for attendees based on negotiated room blocks*
- Set shoulder dates to enable registrants to request pre and post-event rooms*
- 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 matching for multi-occupancy rooms*
- Mandate input of credit card information for hotel reservations*
- Elect to charge registrants for hotel room upfront at the time of registration*
- Charge registrants for hotel rooms based on negotiated daily rates*
- Collect departure and arrival air requests*
- Allow flight selection and manage seat inventory from pre-booked flight options*
- Import registrant flight details*
- Track booked flight details in Cvent and easily execute airport pick-ups*
- 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, Deem, or Concur †
- Retrieve and sync registrant's flight bookings through direct integration with Sabre, Amadeus, Apollo, Galileo, and Worldspan, as well as American Express Global Business Travel's GTR system †
- Create shell PNRs from approved air requests, which then route to an agent to finish †

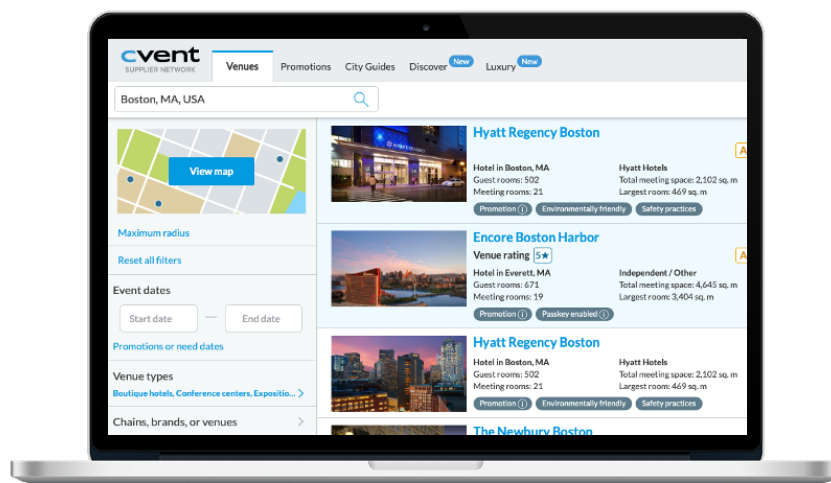
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Venue Sourcing

- Research worldwide meeting city options via the Cvent Destination Guide
- Search database of over 280,000+ event venues and service providers
- Browse venues in over 165 countries
- Apply advanced criteria on supplier searches to filter results based on your event requirements
- Search venues with safety information and available outdoor meeting space
- Filter by meeting space size, number of sleeping rooms, amenities, distance from airport, 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
- Calculate meeting room needs based on size, attendees, and setup
- Track RFPs and venue responses in real time
- Automated notifications on RFP status
- Generate comprehensive side-by-side bid reports in Excel
- Respond back to venue proposals in one click
- Deliver RFPs to multiple suppliers at once



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ADDITIONAL CVENT BENEFITS

Customer Support

- 24-hour live phone and email support 7 days a week
- Chat in real time with support agents
- Online support community for users to access knowledge base articles, forums, success groups, and previous conversation logs with customer care
- A team dedicated to your continued Cvent success
- Unlimited, free online training
- Access to a Client Success Advisor and Solution Specialists for strategic support
- Live webinar training sessions
- Pre-recorded training videos
- Pre-launch event consultation
- Instant access to new features and upgrades
- Receive monthly emails with event management best practices and market trends
- Advocacy program to stay educated and network with like-minded professionals
- Meet with other Cvent users in your local area at Customer Success Groups
- Professional Services for additional assistance†
- Event Build Service for our team to build your event for you†
- Product certifications to prove your Cvent knowledge†

Data Security and Privacy

- Data is hosted in a secure 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
- Sensitive data encryption
- Hourly backups of customer data
- ISO 27001 Certified (Surveillance and Privacy Management System)
- Regulatory Compliance (GDPR and CCPA)
- Platform Security (SOC 1 Type II, SOC 2 Type II, ISO 27001: 2013, ISO 27701:2019, PCI DSS)

ADDITIONAL EVENT SOLUTIONS

Abstract Management

Abstract Management allows you to simplify and efficiently run a Call for Papers and crowdsource great content. You'll be able to manage the complete process, from collecting submissions to publishing final selections into your agenda.

Appointments

Facilitate meetings between attendees, exhibitors, sponsors, and employees, allowing them to make more connections and foster deeper relationships, no matter where an attendee is. Use it to pre-book meetings at the events you attend, too, to maximize your team's time.

Attendee Hub™

The Attendee Hub is an integral part of our Event Marketing and Management Platform, providing the tools to plan, promote, and execute engaging and impactful virtual, hybrid, and in-person meetings and events. It includes a reliable and secure webcast technology for live streams, pre-recorded and collaborative sessions, an interactive attendee website, and an event app for a holistic experience designed to engage attendees with your content, exhibitors and sponsors, as well as other attendees.

LeadCapture

Have one lead retrieval solution across all your events for total control and greater visibility. At hosted events, maximize value for your exhibitors and at events you attend, use the same solution to collect data in a consistent format.

Meetings Management

Get visibility into the meetings and events happening across your organization, with tools to build and manage your budget, collect meeting and event details, standardize your workflows and approval processes, easily provide stakeholder reporting, and more.

Cvent Diagramming & Seating

Use our powerful event diagramming and seating tools to design an event space that meets safety standards and guidelines, foster attendee networking opportunities, save valuable time, and improve stakeholder communications.

Venue Sourcing - Enterprise Bundle

Provides additional capabilities including storing previously negotiated rates, reviewing and approving RFPs before they're sent to venues, and requiring responses to your critical questions ensuring that you receive the most complete bids. Run reports to track your organization's historical meeting spend across departments.