groupize

Feature List

Updated as of September 2020

Groupize Feature CheckList

Features

Customized Events Portal with Administrative Workflow	
Simplicity Index Rules Engine - SMM Strategy for Self-Service to Full Service with full controls and compliance	x
Customized Branding & Content for your Portal	x
Links to internal points pertaining to your event policies, travel, additional services, branding, etc.	x
Define your own Event Types	x
Define your own User Groups Access Levels	x
Duty-ofCare Map and Calendar for all events	x
User Access Control - Visibility of events and ebids based on users pre-defined access	x
Define workflow rules based on: Event Type, # of Attendees, # of Sleeping Rooms or Estimated Budget	x
Self-Service, Expert Assist or Full-Service Workflows to align with business processes in place	x
Enterprise-wide user access with pre-defined user rights	x
Approval workflows to support: Budget, Destination, Travel, Website Content, Payment	x
Assign event launch approval rights to specific users only	Coming Soon
2-Way Push and Pull Integration with Concur Travel	x
Integrate with Travelport Global Distribution System	x
Single Sign On Integration	x
Email Verification by domain	x
Build event budgets based on fixed costs, variable costs or a combination	Coming Soon
Quick and easy entry of budget costs and vendor information	x
Monitor budget by categories and sub-categories	x
Calculate tax and gratuity and miscellaneous expenses	x
Track costs for each session	x
Overview of vendor payment and transaction history	Third Party Tool
Track budgeted, negotiated and actual expenses	x
Leverage budget information to negotiate lower costs with vendors	x
Analyze average cost per attendee	x
Calculte total meetings spend per business unit	Coming Soon

Instant Booking of Hotel Sleeping Rooms	
Instant booking business rules and accessibility via the Travelport Universal API	x
Direct Connect Integration with the Travelport Universal API for rates, availability, terms, conditions, & booking capabilties	x
Negotiated Rates: The Service is able to display BAR Rates in real-time and Negotiated Rates when enabled for viewership in the Travelport GDS of Apollo or Worldspan	x
IATA: The Service is able to associate each Site to a Partner IATA and to shop negotiated rates by Pseudo City Code via the Travelport Universal API	x
Preferred Hotels: The Service is able to display preferred Properties and limit brands that are active and displayed within the shopping experience	x
Content including property description, amenities, photos, and event space diagrams from the Groupize database and/or the Travelport Universal API	x
Authorized Users are able to book sleeping rooms in real time by guaranteeing with a credit card	x
Authorized Users are able to book sleeping rooms in real time with a virtual card entered in the back end administrative access	Coming Soon

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Features

Instant Booking of Hotel Sleeping Rooms (cont.)	
Email confirmations automatically triggered to Travel Arranger and Travelers	x
Creation of live PNR's in Travelport GDS for each room booking	x
View and cancel all instant bookings through the Attendee Dashboard	x
Export reports for all the bookings and includes all fields	x
Option to push each room booking into Concur for Concur Connected Clients (additional fees apply)	x

eBids - Site Selection for Hotels & Venues	
Direct Connect Integration with the Travelport for content including rates, property description, amenities, photos, and event space diagrams	x
Monitor budget items by category	x
Creation of a curated hotel and venue search engine with Simplicity Index Rules, by account & organization	x
Search database of over 150,000 event venues and service providers	x
Browse venues in over 165 countries	x
Apply advanced criteria on supplier searches to filter results	x
Choose to filter by chain affiliation, rating, number of sleeping rooms, meeting spcace, etc.	x
Search for venues based on their proximity to other locations	x
Flag preferred venues and service providers	x
Display negotiated rates for benchmarking	x
Calculate meeting room needs based on size, attendees and set-up	x
Attach custom documents to RFPs	x
Add key contact information for properties and chains	x
Email templates pre-populated with organization information	x
Use advanced reporting tools to compare and contrast budget data	x
Google Map Integration : The Authorized User can search hotels based on geo-locations	x
Request an eBid: An Authorized User can enter information about a meeting or event including group name, sleeping rooms, event space requirements, F&B, Audio Visual, attachments, additional comments, selected dates, number of rooms, and number of participants	x
Deliver eBids to multiple suppliers at once for competivite bid process and due dilligence	x
Track eBids in real-time	x
Automated notifications sent to suppliers included in the eBid based on status	x
Compare eBids from multiple suppliers in side-by-side dashboard	x
Generate comprehensive side-by-side report in Excel	x
Send reponses to supplier proposals in one-click	x
Pre-attached hotel addendum per customer	x
Request to receive eBids directly from hotels in one instance.	x
Receive competing and qualified bids via email and/or in eBids module	x
Upload event requirements to share with hotels and venues	x
Automatic upload of attachments and communications in one repository	x
Best practices workflow automation and tracking of statuses and stages	x
Negotiate and communicate directly with the hotel	x
Cost tab to enter and track budgets, estimated through to actual	x

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Features

Event Registration & Attendee Management

Feature	
Mobile responsive registration website creation: Ability to create and publish a customized registration web site to include multiple categories including hotel requests, air ticket requirements, branding, rich content, social links, agenda, event information, contact details, FAQ's and upload documents	x
Produce custom event websites to match organizational branding (No HTML knowledge required)	x
Design custom pages regarding speakers, agenda, fees, travel, etc.	x
Customize event website header and footer	x
Create online registration processes for events of all sizes and types	x
Event set-up: Create or clone event including information such as location, dates, budget and planner information	x
Dashboard of all events at Account or Organization level including list view, calendar view and map view	x
Collaboration: Grant colleagues or travel agents access to the set-up and relevant reports	x
Ability to import or add attendees	x
Registration fields and custom questions	x
Event registration alerts to planner for registration activities	x
Online Event Registration: Allow for registration on behalf of attendees on registration sites	x
Ability to manage Group Air requests or to integrate to Concur for Air (additional fee applies)	x
Companion management - Allow registrants to sign up guests	x
Google Maps for locations	x
Attendee management and communication via email	x
Logistical reports exported to Excel for attendees, responses, rooming list and flight manifest	x
Social networking integration with the major networks	x
Configure event URL to include organization and event name	x
Upload and share key documents for online viewing	x
Promote event sponsors on event website	x
Include links to related websites	x
Location directions to registrants with Google Maps integration	x
Post a live event website the instant event is launched	x
Pre-populate contact information on registration forms	x
Designate required input fields	x
Restrict registration to those contacts on the invitation list	x
Option to password protect registration process	Coming Soon
Ability for registrants to forward invitations to colleagues during registration	x
Support registrant upload of presentations, abstracts, biographies or other documents	x
Create dynamic registration paths based on contact type, such as exhibitor, attendee or speaker	Coming Soon
Accept registrant modicifications or cancellations up until specified dates	x
Create either included or optional sessions	x
Limit selection of sessions/activities to specific invitee segments	Coming Soon
Ask registrants conditional questions only after sessions are chosen	Coming Soon
Opt to automatically close an event or session when it reaches capacity	x
Register attendees on the back-end as an administrator	x
Find invitees quickly with advanced search	x
Manually mark participant status when an event ends	x
Pull event and session attendee lists for event staff	x

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Travel, Housing & Event Booking Pages

Event Booking Pages: create and publish dedicated website for an event	x
Select and curate hotels for an event	x
Traditional Room Block Management: Load a room block and let attendees claim their rooms as inventory counts	x
are reflected with every booking and can be shared via a rooming list	x
Import rooming list for pre-populated designated assignment of rooms	x
Instant Block: book from a negotiated block code loaded by a hotel in a Travelport GDS in real time	x
Define payment options for rooms	x
Manage rooms by attendee or event organizer	x
Online cancellation and modifications	x
Attendee communications by email	x
Collect hotel, flight and car rental requests	x
Block off rooms for attendees based on negotiated room blocks	x
Monitor room blocks across all properties in real-time	x
Show different property and room options based on contact type	Coming Soon
Mandate input of credit card information for hotel reservations	x
Charge registrants for hotel rooms based on negotiated daily rates	x
Collect air travel departure and arrival requests	x
Import registrant flight details	Coming Soon
Track booked flight details and easily execute airport pick-up and transfer schedules	x
Personalize itineraries, directions and confirmations	x
Grant hotels or travel agents access to relevant reports	x
Integrate directly with a property that is Pass-key enabled	x
Exportable reports including hotel pick up tracking reports.	x

Email Marketing

Targeted event email communications and customizable email templates	x
Create, save and re-use email templates	x
Customize email templates to match organizational branding	x
Use mail-merge data tags, such as name and company, to personalize emails	x
Choose "Sent from" name per email to ensure higher open rates	x
Customize "Reply to" email address	x
Easily re-send confirmations, itineraries, or personal agendas	x
Drop barcodes into emails for scanned check-in	Coming Soon
Save favorite email templates for easy re-use	x
Track email delivery rates and open rates	Third Party Tool
Comply with CAN-SPAM Act with opt out option	x

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Features

Reporting

Run standard reports in one click	x
Measure and aggregate key event metrics with cross event reports	x
Save reports with pre-selected criteria	x
Use colorful charts and graphs to make reports presentation-ready	x
Business Intelligence Reporting at the Account Level for overall spend, savings aggregated & filtered by various data points	x
Generate reports of spending and revenue trends	Coming Soon
Produce executive summary of event costs compared to revenue	Coming Soon

Online Services

Dashboard and event Reporting for onsite check-in status updates and ongoing event management	x
Ability to collect payments via third party system - Stripe	x
Ability to manage inventoried items	x
Option to Integrate with Concur for select features including air bookings and room blocks (additional fee)	x

Concur Travel Integration

Connect to a dedicated instance of Concur Travel	x
Integrate the Concur Travel booking experience in an email, registration site or event booking page	x
Access profiles for Concur Profiled Travelers	x
Push Hotel Room confirmation details (TripLink may be required)	x
*The Concur App & Profile integration does not include the Concur Third Party Registration Module which needs to be purchased directly from Concur. The Concur Third Party Registration Module is an optional feature but enables the following functionality in Groupize:	x
Create shell profiles for non-profiled travelers	x
Create event specific rules to be enforced within Concur	x
Handle event specific payment for non-profiled and profiled travelers within Concur	x

Secure Payment Collection & Processing

Allow registrants to send partial payments, or choose to accept only complete payments	Third Party Tool
Automate refunds according to custom refund policy	Third Party Tool
Real-time credit card processing	Third Party Tool
Direct deposit of all payments into planner's merchant account	x
Safely process fees via Payment Card Industry (PCI) compliant provider	x

Data Security

Hosted with the numberone cloud service provider in the world	x
Payment Card Industry (PCI) level 1 compliant	x
Credit card number encryption	x

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Client Support	
User-friendly interface to create events quickly and easily	x
Live phone and email support Mon - Fri 8:00 am - 6:00 pm ET	x
Chat Support	Coming Soon
90% of calls answered in under 90 seconds	x
Dedicated Customer Success Manager	x
No installation, download or updates required	x
Unlimited, free online training	x
Custom Training designed specific to your Organizational requirements	x
Live webinar training sessions	x
Pre-recorded training videos available	x
Pre-launch strategic event technology implementation consultation (fees may apply)	x
Instant access to new features and upgrades	x
Ongoing event management best practices and market trends communications	x