



Batch Generate Documents

2018 - Spring Edition

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Overview

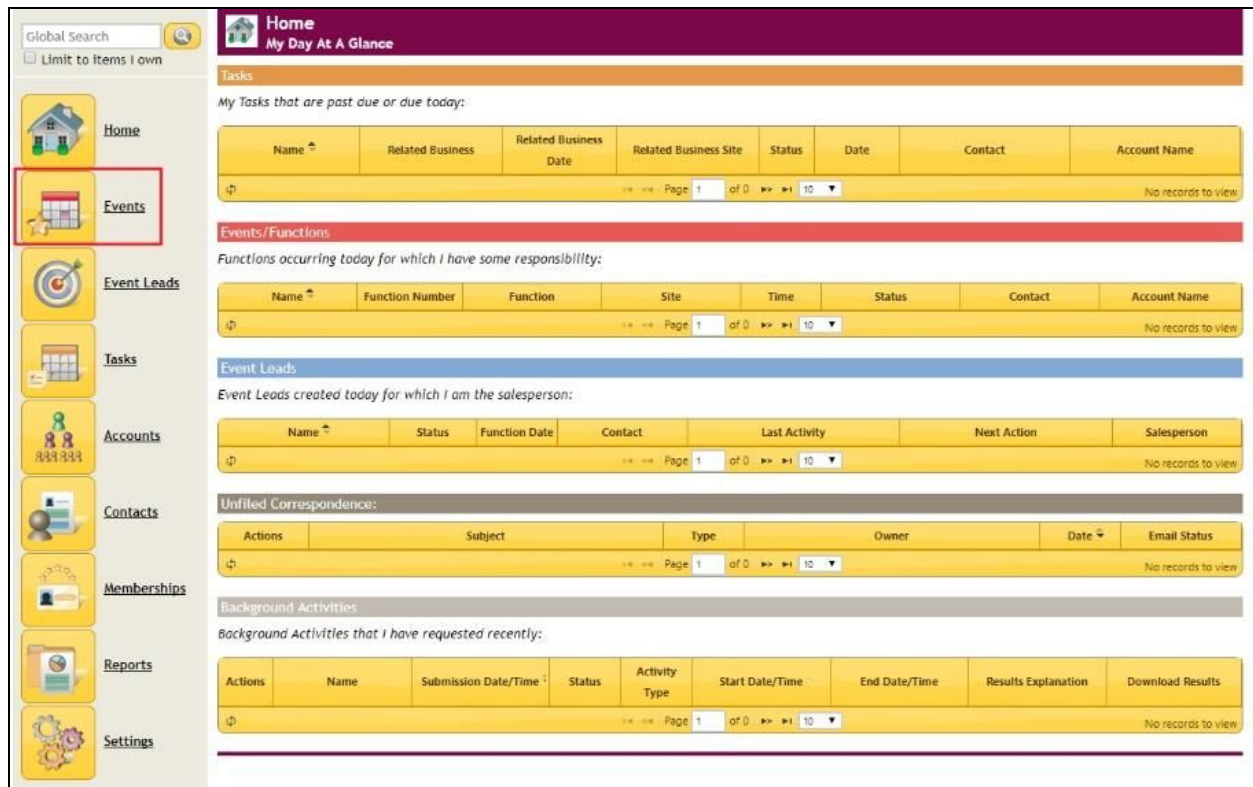
Banquet Event Orders (BEOs) can be generated for each event. In order to create a Banquet Event Order for multiple events, you can create a Batch Generation of **BEOs**.

Use Case(s)

The Club is having a managers meeting and needs to give all the managers a BEO for each event for the upcoming week/month.

Accessing the Tool

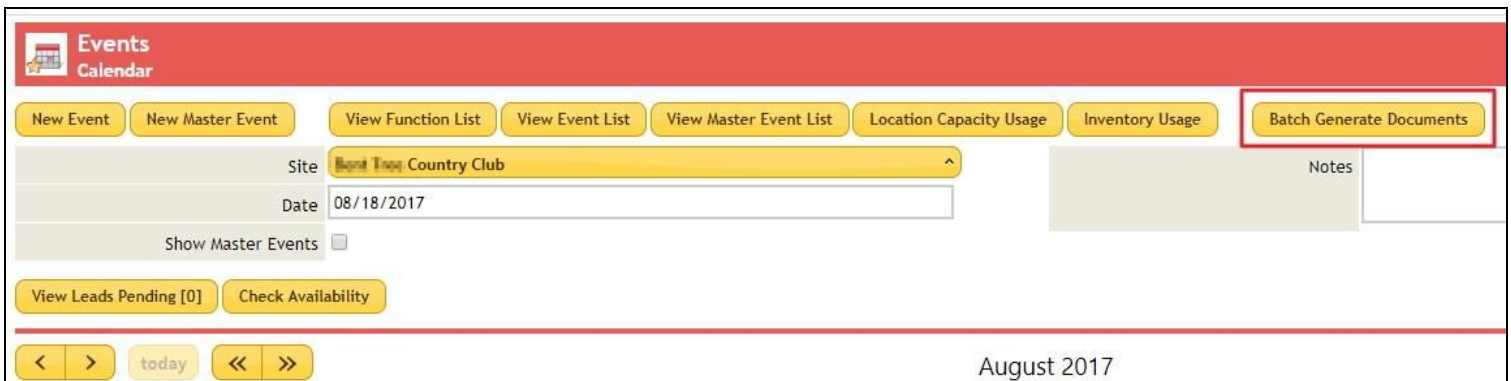
To **print** a batch of **BEOs** or other event documents you will go to **Events** (on the left).



The screenshot shows a software interface with a sidebar on the left containing navigation icons for Home, Events, Event Leads, Tasks, Accounts, Contacts, Memberships, Reports, and Settings. The 'Events' icon is highlighted with a red box. The main content area is titled 'Home My Day At A Glance' and contains several sections:

- Tasks:** A table with columns: Name, Related Business, Related Business Date, Related Business Site, Status, Date, Contact, Account Name. Below the table is a pagination control showing 'Page 1 of 0' and 'No records to view'.
- Events/Functions:** A section titled 'Functions occurring today for which I have some responsibility:'. Below it is a table with columns: Name, Function Number, Function, Site, Time, Status, Contact, Account Name. Below the table is a pagination control showing 'Page 1 of 0' and 'No records to view'.
- Event Leads:** A section titled 'Event Leads created today for which I am the salesperson:'. Below it is a table with columns: Name, Status, Function Date, Contact, Last Activity, Next Action, Salesperson. Below the table is a pagination control showing 'Page 1 of 0' and 'No records to view'.
- Unfiled Correspondence:** A table with columns: Actions, Subject, Type, Owner, Date, Email Status. Below the table is a pagination control showing 'Page 1 of 0' and 'No records to view'.
- Background Activities:** A section titled 'Background Activities that I have requested recently:'. Below it is a table with columns: Actions, Name, Submission Date/Time, Status, Activity Type, Start Date/Time, End Date/Time, Results Explanation, Download Results. Below the table is a pagination control showing 'Page 1 of 0' and 'No records to view'.

Then select **Batch Generate Documents**.




The screenshot shows the 'Events Calendar' interface. At the top, there is a red header with the text 'Events Calendar'. Below the header, there is a row of buttons: 'New Event', 'New Master Event', 'View Function List', 'View Event List', 'View Master Event List', 'Location Capacity Usage', 'Inventory Usage', and 'Batch Generate Documents'. The 'Batch Generate Documents' button is highlighted with a red box. Below the buttons, there is a form with the following fields:

- Site:** A dropdown menu with 'Baptiste Country Club' selected.
- Date:** A text input field containing '08/18/2017'.
- Show Master Events:** A checkbox that is currently unchecked.

At the bottom of the interface, there is a navigation bar with buttons for '<', '>', 'today', '<<', and '>>'. On the right side of the navigation bar, the text 'August 2017' is displayed.

Batch Generation

On this page, select the **date range**, check the **events** to be included from the list below, and select the **document(s)** to create.

 Batch Generate Documents

Generate Documents Done

Business

Business Type Event

Filters

Event Date Between 08/01/2017 and 08/31/2017

Event Status 10 selected

Event Salesperson Name

Master Event Type Show All

Master Event Name

Event Type Show All

Event Name

Site Show All

Choose Events

| <input type="checkbox"/> | Event Name | Event Number | Site | Locations | Start Date | End Date | Status | Contact | Account Name |
|--------------------------|-------------------------------|--------------|------------------------|-----------------|------------|------------|----------|-------------------|--------------|
| <input type="checkbox"/> | Ann Donachie Memorial Service | 4208-1 | Bent Tree Country Club | Willow Room | 08/12/2017 | 08/12/2017 | Definite | Donachie, Robert | |
| <input type="checkbox"/> | Beal Pick up | 4215-1 | Bent Tree Country Club | Lobby | 08/15/2017 | 08/15/2017 | Closed | Beal, Allison | |
| <input type="checkbox"/> | BEO Meeting | 3128-1 | Bent Tree Country Club | Lake Room | 08/23/2017 | 08/23/2017 | Inquiry | Farragut, Phyllis | |
| <input type="checkbox"/> | BEO Meeting | 3129-1 | Bent Tree Country Club | Lakeview Lounge | 08/30/2017 | 08/30/2017 | Inquiry | Farragut, Phyllis | |
| <input type="checkbox"/> | BEO Meeting | 3125-1 | Bent Tree Country Club | Willow Room | 08/02/2017 | 08/02/2017 | Inquiry | Cunningham, Carl | |
| <input type="checkbox"/> | BEO Meeting | 3126-1 | Bent Tree Country Club | Willow Room | 08/09/2017 | 08/09/2017 | Inquiry | Cunningham, Carl | |
| <input type="checkbox"/> | BEO Meeting | 3127-1 | Bent Tree Country Club | Willow Room | 08/16/2017 | 08/16/2017 | Inquiry | Cunningham, Carl | |
| <input type="checkbox"/> | Bishop Pool Party | 4193-1 | Bent Tree Country Club | Pool Area | 08/26/2017 | 08/26/2017 | New | Bishop, Barbara | |
| <input type="checkbox"/> | Board Meeting | 4020-1 | Bent Tree Country Club | Willow Room | 08/30/2017 | 08/30/2017 | Definite | Burkett, Dan | |
| <input type="checkbox"/> | Bowie Pick Up | 4218-1 | Bent Tree Country Club | Lobby | 08/16/2017 | 08/16/2017 | Closed | Bowie, Robert | |
| <input type="checkbox"/> | Bowie Pick Up | 4218-1 | Bent Tree Country Club | Lobby | 08/16/2017 | 08/16/2017 | Closed | Bowie, Robert | |

Click **Generate Documents**.

Choose Filters

Override Document Defaults

Document Templates

Folder ReServe System Document Folders

All Organization Folders

Bent Tree Country Club

Choose Document Templates

| <input type="checkbox"/> | Name | Description |
|--------------------------|--|---|
| <input type="checkbox"/> | Guest Menu | Displays menus for each function on a separate page. |
| <input type="checkbox"/> | Event Proposal | Event Proposal |
| <input type="checkbox"/> | Event Order - Internal | Internal Event Order with Prices and Internal Notes |
| <input type="checkbox"/> | Thank You Letter | Thank you letter with Survey |
| <input type="checkbox"/> | Event Order - Contact | Event Order with Prices and Summary of Charges |
| <input type="checkbox"/> | Confirmation Letter with Deposit Due | With Single Deposit: Letter to confirm tentatively booked event. |
| <input type="checkbox"/> | Event Invoice | Event Invoice |
| <input type="checkbox"/> | Event Order - Internal | Internal Event Order with Internal Notes - without Prices and EC Box |
| <input type="checkbox"/> | Confirmation Letter with Multiple Deposits | With Deposit Summary Table: Letter to confirm tentatively booked event. |
| <input type="checkbox"/> | Confirmation Letter with No Deposit Due | No Deposit: Letter to confirm tentatively booked event. |
| <input type="checkbox"/> | Event Order - Contact | Event Order with Prices and Total Charges |

Document Options

File Format PDF Document - .pdf


Separate Files

Generate Documents Done

Retrieve Documents

These documents will need to be retrieved on the Home page at the bottom under **Background Activities**.



 Home
My Day At A Glance

Tasks
 My Tasks that are past due or due today:

| Name | Related Business | Related Business Date | Related Business Site | Status | Date | Contact | Account Name |
|--------------------|------------------|-----------------------|-----------------------|--------|------|---------|--------------|
| No records to view | | | | | | | |

Events/Functions
 Functions occurring today for which I have some responsibility:

| Name | Function Number | Function | Site | Time | Status | Contact | Account Name |
|--------------------|-----------------|----------|------|------|--------|---------|--------------|
| No records to view | | | | | | | |

Event Leads
 Event Leads created today for which I am the salesperson:

| Name | Status | Function Date | Contact | Last Activity | Next Action | Salesperson |
|--------------------|--------|---------------|---------|---------------|-------------|-------------|
| No records to view | | | | | | |

Unfiled Correspondence:

| Actions | Subject | Type | Owner | Date | Email Status |
|--------------------|---------|------|-------|------|--------------|
| No records to view | | | | | |

Background Activities
 Background Activities that I have requested recently:

| Actions | Name | Submission Date/Time | Status | Activity Type | Start Date/Time | End Date/Time | Results Explanation | Download Results |
|-----------------|---------------------------|-------------------------|----------|----------------|-------------------------|-------------------------|---------------------|-------------------------------------|
| Delete | Batch Document Generation | 08/18/2017 04:13 PM EDT | Complete | Batch Document | 08/18/2017 04:14 PM EDT | 08/18/2017 04:14 PM EDT | | Event-documents.pdf |
| View 1 - 1 of 1 | | | | | | | | |

Under Background Activities, the documents requested will be available under **Download Results**.

FAQs

Q: How can I separate the documents I am downloading into individual PDFs?

A: Documents can be separated individually or all included in one document. Be sure to specify this setting during the Batch Generation step under **Document Options**.

Best Practices

- Ensure all date ranges are correct for BEO document search for the most accurate results.