



Creating an Event Document

2018 - Summer Edition

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Overview

Learn to create an event document within Banquets, such as an invoice, BEO, or contact to provide to clients.

Use Case(s)

Creating event documents for invoices, BEO, or contracts.

Accessing the Tool

Click on Events in Reserve.

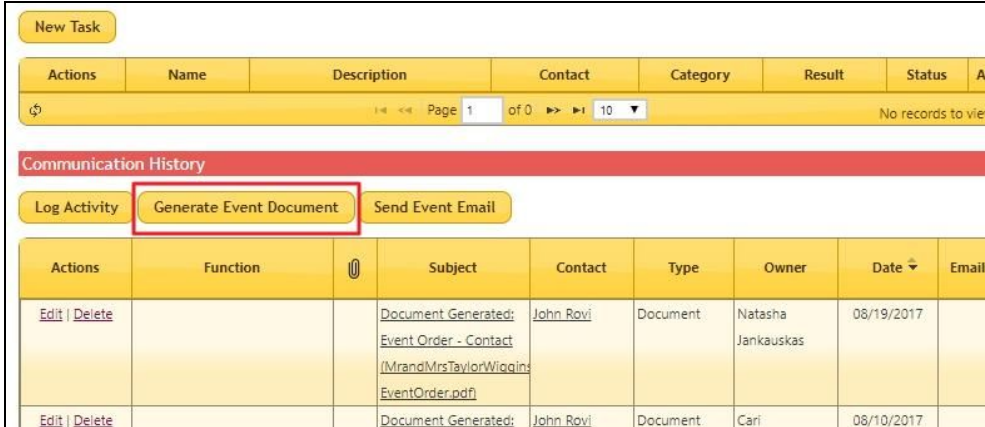


Generating the Event Document

Double click on the event you are needing to make a BEO, Contract or Invoice for.

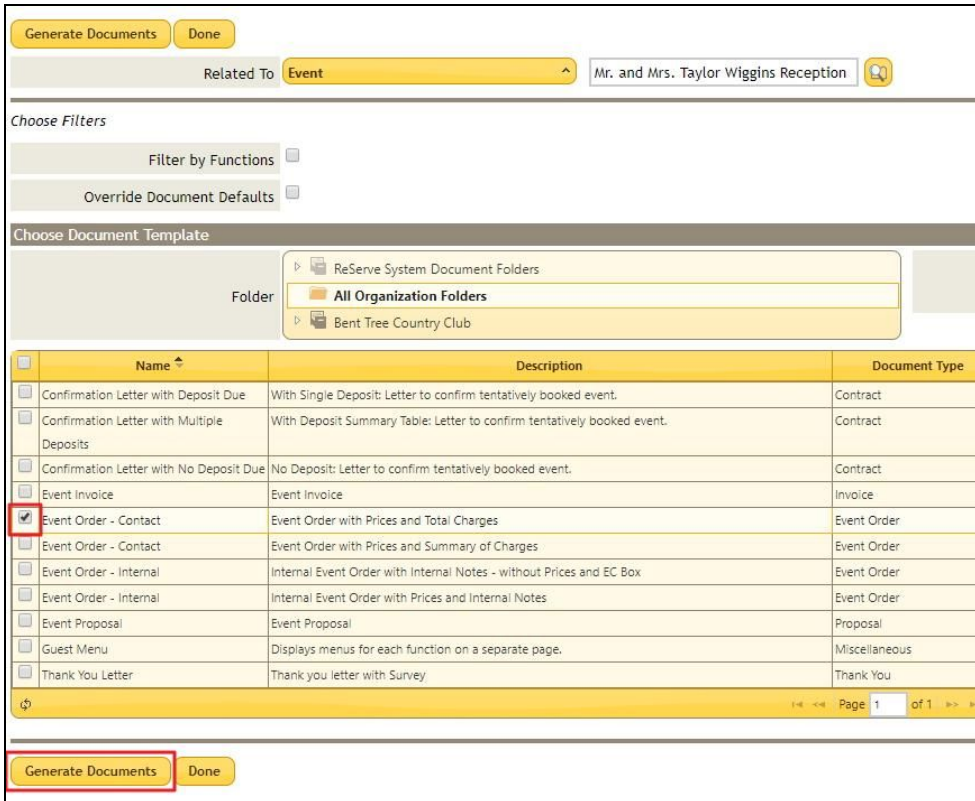
August 2017							Month	Week	Day	Month By Location
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
10:45 AM Patterson Family Branch 12:45 PM Grimm Branch	4 PM Employee Pool Party	10 AM Mahjong 10 AM Tennis Bridge 2 PM Executive Committee Meeting	9 AM Fawcett Meeting 10 AM Bridge 10 AM Hoffman 1:30 PM Salom Meeting 2 PM BEO Meeting 5:30 PM Ladies Happy Hour	7 AM IAD Breakfast 10 AM Dallas Junior Forum 10 AM New Hire-DO NOT POST 6 PM San Diego State Send Off	2 PM New Hire-DO NOT POST 5:30 PM Couples Twilight 6 PM Lissiak Dinner 7 PM Create Church	8 AM Georgia Milner 1st Birthday Party 12:30 PM Horner Surprise Party - DO NOT POST 4 PM McDonald Pool Party				
		10 AM Mahjong 10 AM Tennis Bridge 11:15 AM Tee It Up for the Troops Committee 11:15 AM Tee It Up for the Troops Committee 11:30 AM House Committee 2 PM Executive Committee Meeting 5:30 PM Kid's Movie Night 6 PM New Member Cocktail Reception 7 PM Rodan + Fields Presentation	10 AM Bridge 10 AM Rosebery 11:15 PM NWC Corporate 2 PM BEO Meeting 5:30 PM Ladies Happy Hour 6 PM Couples Bridge 6 PM Dinner with David Feherty	7:45 AM United Texas Bank 9 AM c12 group	10 AM New Hire-DO NOT POST 10 AM Rosebery 2 PM New Hire-DO NOT POST	10 AM New Hire Orientation - DO NOT POST 11:30 AM Ann Donachie Memorial Service 1:30 PM O'Hara Cake Pick Up-DO NOT POST 5:30 PM Mr. and Mrs. Taylor Wiggins Recep				
12:45 PM Grimm Branch		10 AM Mahjong 10 AM Tennis Bridge	7 AM c12 group #2 9 AM IAD	12 PM North Dallas Bank 2 PM Vassallo Ice Cream	4:30 PM Pettjohn - Family Legacy Presentati 6:30 PM Karaoke Night	7 AM Men's Playday 11 AM Graham Pool Party				

Scroll down until you see Generate Event Document.



The screenshot shows a 'New Task' interface with a table of communication history. At the top of the table, there are three buttons: 'Log Activity', 'Generate Event Document' (highlighted with a red box), and 'Send Event Email'. The table has columns for Actions, Function, Subject, Contact, Type, Owner, Date, and Email. Two rows are visible, both representing 'Document Generated' events by 'John Rovi' on 08/19/2017 and 08/10/2017.

1. Click the box next to the document you want to generate.
2. Then click Generate Document at the top or bottom of the box.



The screenshot shows the 'Generate Documents' interface. At the top, there are buttons for 'Generate Documents' and 'Done'. Below this, there's a 'Related To' dropdown set to 'Event' and a search box containing 'Mr. and Mrs. Taylor Wiggins Reception'. There are filter options for 'Filter by Functions' and 'Override Document Defaults'. A 'Choose Document Template' section shows a folder list with 'All Organization Folders' selected. Below this is a table of document templates. The 'Event Order - Contact' template is selected with a red box. At the bottom, the 'Generate Documents' button is also highlighted with a red box.

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

This will cause the document to be created and downloaded on your computer. You should be able to find this at the bottom of your browser screen or in your downloads folder.