

Banquets - Batch Generate Documents

Banquets - Getting Started

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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 or month.

Content

- Accessing the Tool
- Batch Generation
- Retrieve Documents

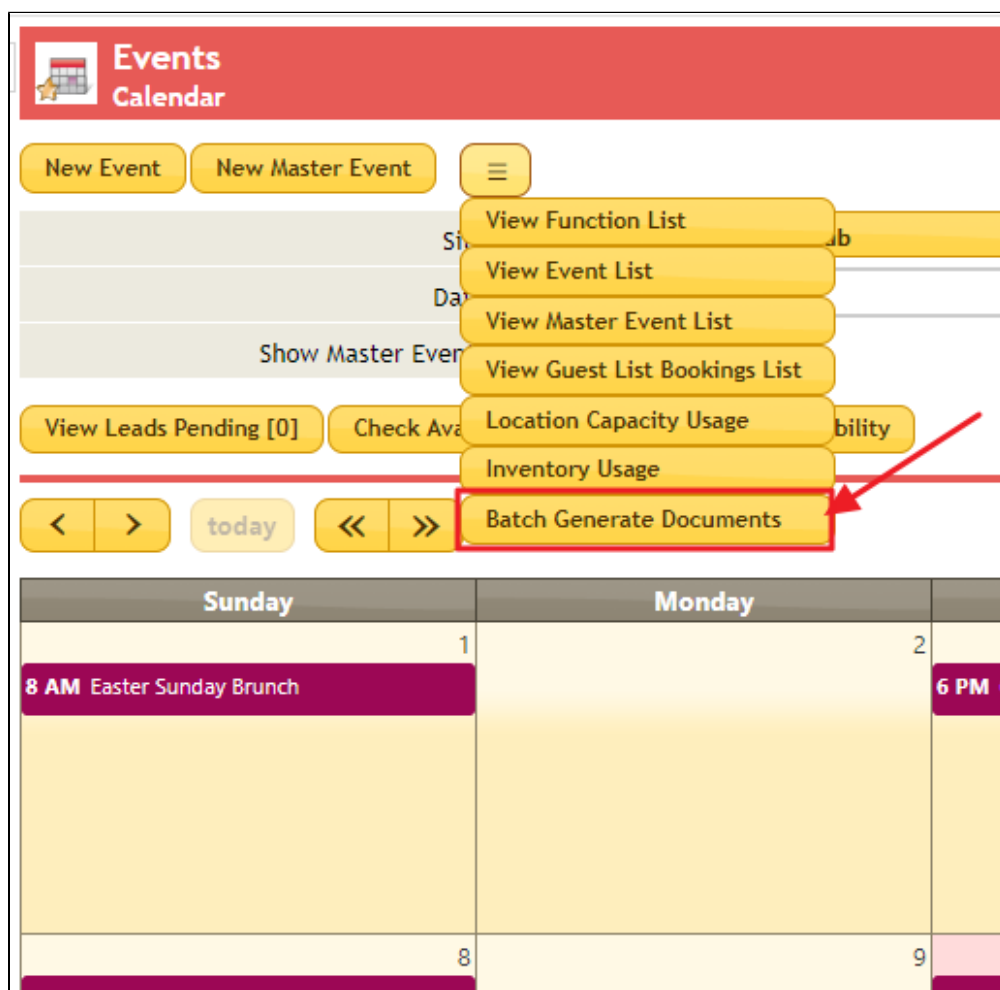
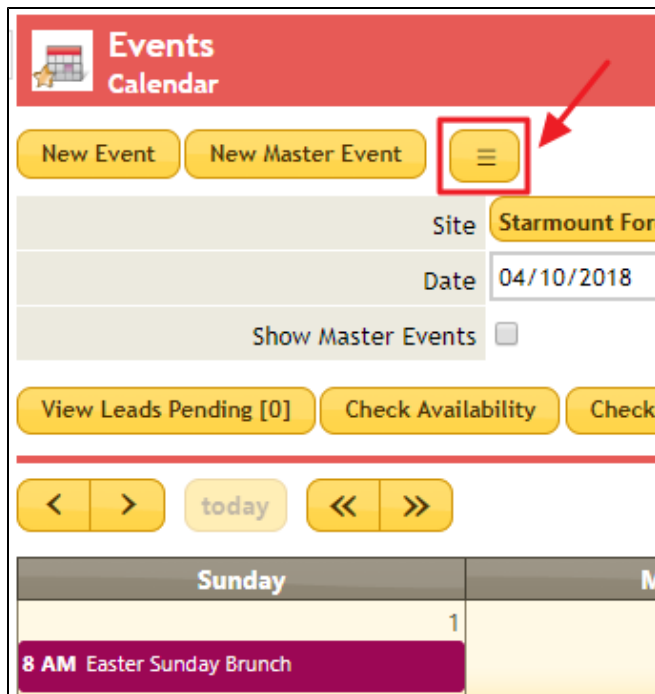
Accessing the Tool

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

The screenshot shows a web application interface. On the left is a sidebar with navigation icons and labels: Home, Events (highlighted with a red box), Event Leads, Tasks, Accounts, Contacts, Memberships, Reports, and Settings. The main content area has a purple header with 'Home My Day At A Glance'. Below the header are several sections, each with a title bar and a table:

- Tasks**: Title bar 'Tasks'. Subtitle 'My Tasks that are past due or due today:'. Table with columns: Name, Related Business, Related Business Date, Related Business Site, Status, Date, Contact, Account Name. Page 1 of 0.
- Events/Functions**: Title bar 'Events/Functions'. Subtitle 'Functions occurring today for which I have some responsibility:'. Table with columns: Name, Function Number, Function, Site, Time, Status, Contact, Account Name. Page 1 of 0.
- Event Leads**: Title bar 'Event Leads'. Subtitle 'Event Leads created today for which I am the salesperson:'. Table with columns: Name, Status, Function Date, Contact, Last Activity, Next Action, Salesperson. Page 1 of 0.
- Unfiled Correspondence**: Title bar 'Unfiled Correspondence:'. Table with columns: Actions, Subject, Type, Owner, Date, Email Status. Page 1 of 0.
- Background Activities**: Title bar 'Background Activities'. Subtitle 'Background Activities that I have requested recently:'. Table with columns: Actions, Name, Submission Date/Time, Status, Activity Type, Start Date/Time, End Date/Time, Results Explanation, Download Results. Page 1 of 0.

Once in Events, select the menu icon, then select **Batch Generate Documents**.



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

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

Document Type: Show All

Choose Document Templates

Name	Description	Document Type	Folder	Separate Function Pages	Sort First By	Filtered By
Guest Menu	Displays menus for each function on a separate page.	Miscellaneous	Default Documents	Yes	Function	
Event Proposal	Event Proposal	Proposal	Event Document Templates	No	Function	
Event Order - Internal	Internal Event Order with Prices and Internal Notes	Event Order	Event Document Templates	No	Function	
Thank You Letter	Thank you letter with Survey	Thank You	Event Document Templates	No	Function	
Event Order - Contact	Event Order with Prices and Summary of Charges	Event Order	Event Document Templates	No	Function	
Confirmation Letter with Deposit Due	With Single Deposit: Letter to confirm tentatively booked event.	Contract	Event Document Templates	No	Function	
Event Invoice	Event Invoice	Invoice	Event Document Templates	No	Function	
Event Order - Internal	Internal Event Order with Internal Notes - without Prices and EC Box	Event Order	Event Document Templates	No	Function	
Confirmation Letter with Multiple Deposits	With Deposit Summary Table: Letter to confirm tentatively booked event.	Contract	Event Document Templates	No	Function	
Confirmation Letter with No Deposit Due	No Deposit: Letter to confirm tentatively booked event.	Contract	Event Document Templates	No	Function	
Event Order - Contact	Event Order with Prices and Total Charges	Event Order	Event Document Templates	No	Function	

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Document Options

File Format: PDF Document - .pdf
Separate Files: []
Email Results: []

Generate Documents Done

Retrieve Documents

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

Global Search

Limit to items I own

- [Home](#)
- [Events](#)
- [Event Leads](#)
- [Tasks](#)
- [Accounts](#)
- [Contacts](#)
- [Memberships](#)
- [Reports](#)
- [Settings](#)

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 documents?

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.

Downloadable Guide