



Banquets - Edit Existing Documents

2016 - Winter Edition

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Overview

A **Document Template** is a great tool to help simplify repetitive written content, while still allowing for flexibility in content adjustment when needed based on event needs. The **Template** is essentially the framework of the document that is to be repeated. **Templates** can be modified and/or edited as necessary to meet necessary **Event** requirements.

Use Case(s)

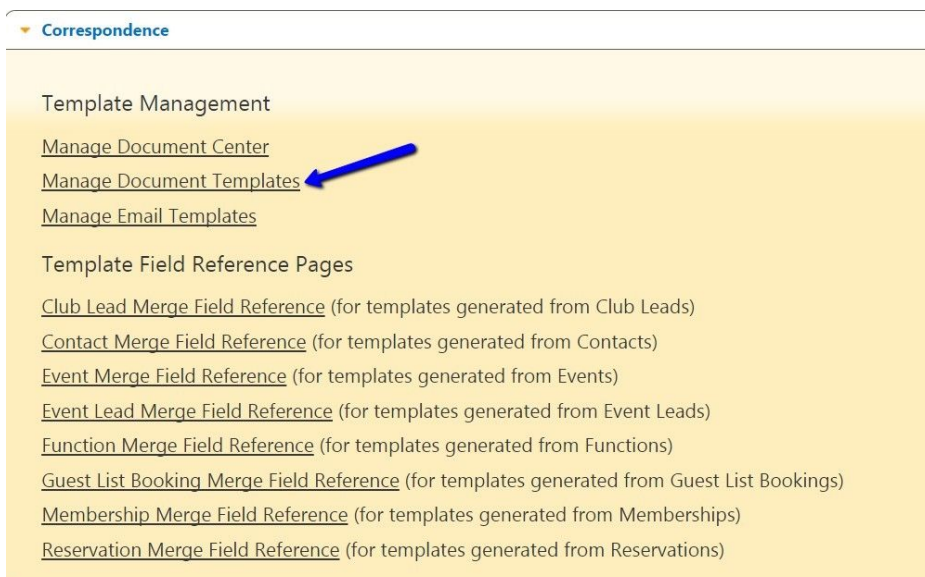
The Club requires that an official contract be signed every time an event is booked. The main structure of the Contract is defined using a **Document Template**. This ensures the rules, regulations, main contract verbiage etc., is consistently included in every contract generated.

Accessing the Tool

Navigate to **Settings**, click **Correspondence**.



Select **Manage Document Templates**.

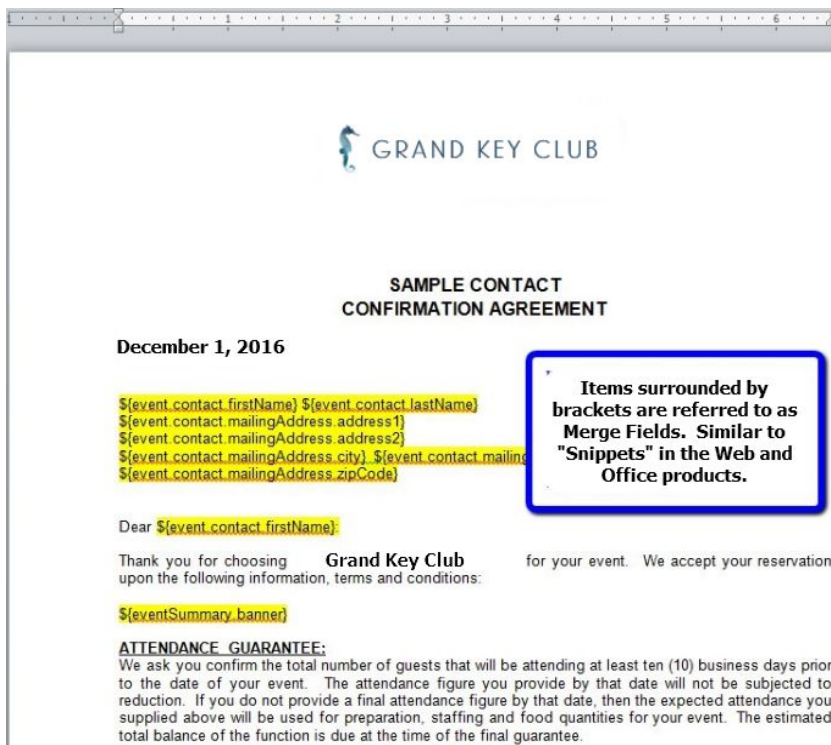


Click on the **View link** to the left of the **document** you wish to edit.

Settings Manage Document Templates							
Folder		All Folders	Add Folder				
New	Done						
Actions	Name	Description	Business Type	Document Type	Folder	Default Document	Each Function on Separate Page
View Edit Delete	Contract		Event	Contract	Events Folder	No	No
View Edit Delete	Deposit Received Letter		Event	Miscellaneous	Events Folder	No	No
View Edit Delete	Event Invoice		Event	Invoice	Events Folder	No	No
View Edit Delete	Event Order - Customer	Prices and Summary of Charges - No Estimated Charges or Internal Notes	Event	Event Order	Events Folder	No	No
View Edit Delete	Event Order - Internal	Internal - Without Prices or Summary of Charges or Timeline	Event	Event Order	Events Folder	No	No
View Edit Delete	Event Order - Internal	Internal (Without Prices or Summary of Charges with Timeline)	Event	Event Order	Events Folder	No	No
View Edit Delete	Event Proposal		Event	Proposal	Events Folder	No	No
View Edit Delete	Thank You Letter		Event	Thank You	Events Folder	No	No

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The **document** is then downloaded as a **Word Document**. Verbiage that is located within the document can now be edited. The **document** correspondence may contain **'merge fields'**, which are indicated by **dollar signs and brackets \$ { }**. **Merge Fields** are used to display specific information that may be unique to the event, contact, etc.



GRAND KEY CLUB

SAMPLE CONTACT CONFIRMATION AGREEMENT

December 1, 2016

Items surrounded by brackets are referred to as Merge Fields. Similar to "Snippets" in the Web and Office products.

Dear **\${event.contact.firstName}**:

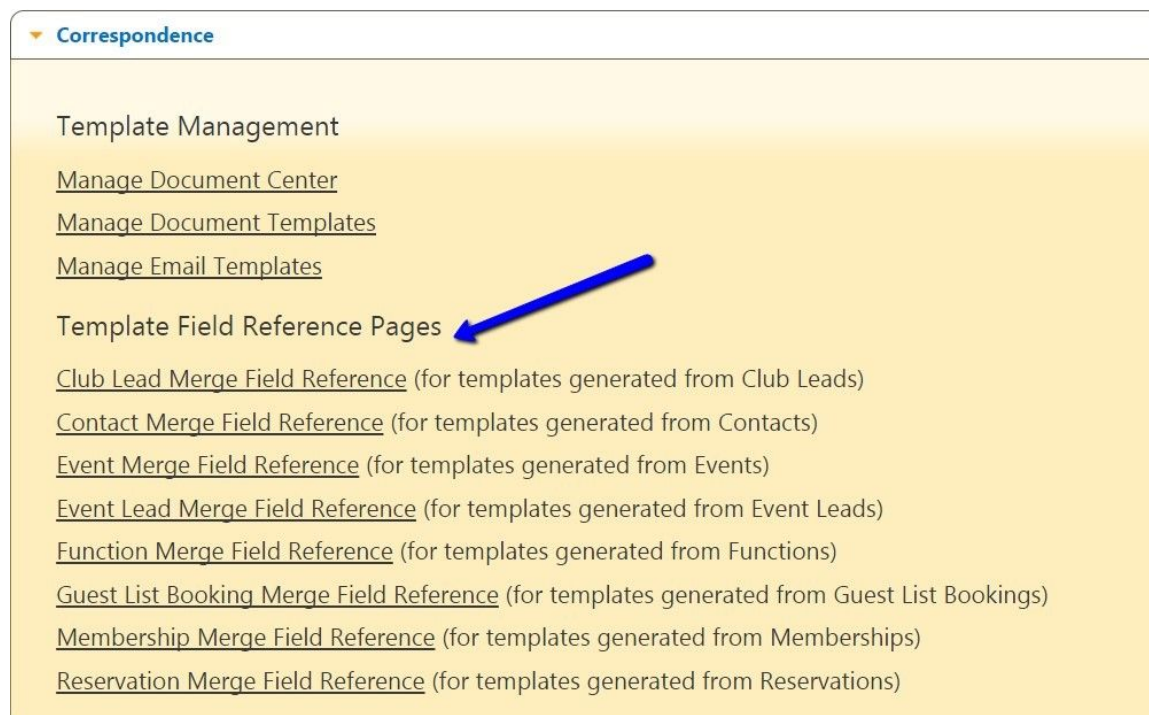
Thank you for choosing **Grand Key Club** for your event. We accept your reservation upon the following information, terms and conditions:

ATTENDANCE GUARANTEE:
We ask you confirm the total number of guests that will be attending at least ten (10) business days prior to the date of your event. The attendance figure you provide by that date will not be subjected to reduction. If you do not provide a final attendance figure by that date, then the expected attendance you supplied above will be used for preparation, staffing and food quantities for your event. The estimated total balance of the function is due at the time of the final guarantee.

Editing Templates

To **edit** the hard coded information, simply type before, over, or after the existing verbiage.

To **add** or **edit** a **merge field** in the **document**, navigate in **Settings > Correspondence**, where various **merge field** reference pages can be found. Select the type of reference page needed, find the **merge field** desired, and **copy/paste (Ctrl C/Ctrl V)** the field value into the **document**.



When you have finished editing the **document**, navigate back to **Settings > Correspondence > Manage Document Templates**. Click the **Edit link** next to the same **document** you originally viewed.

Settings
Manage Document Templates

Folder **All Folders** ^ Add Folder

New Done

Actions	Name 	Description	Business Type	Document Type	Folder	Default Document	Each Function on Separate Page
View Edit Delete	Contract 		Event	Contract	Events Folder	No	No
View Edit Delete	Deposit Received Letter		Event	Miscellaneous	Events Folder	No	No
View Edit Delete	Event Invoice		Event	Invoice	Events Folder	No	No
View Edit Delete	Event Order - Customer	Prices and Summary of Charges - No Estimated Charges or Internal Notes	Event	Event Order	Events Folder	No	No
View Edit Delete	Event Order - Internal	Internal - Without Prices or Summary of Charges or Timeline	Event	Event Order	Events Folder	No	No
View Edit Delete	Event Order - Internal	Internal (Without Prices or Summary of Charges with Timeline)	Event	Event Order	Events Folder	No	No
View Edit Delete	Event Proposal		Event	Proposal	Events Folder	No	No
View Edit Delete	Thank You Letter		Event	Thank You	Events Folder	No	No

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You can now **edit the name**, **add a description** and **change the folder** that the document lives in, if desired. **Click the Replace File button** to browse your computer for the file you finished editing. When you have finished replacing the **document**, **click Save**.

Settings
Edit Document Template

Save Cancel


Name

Description

Business Type

Document Type

Folder

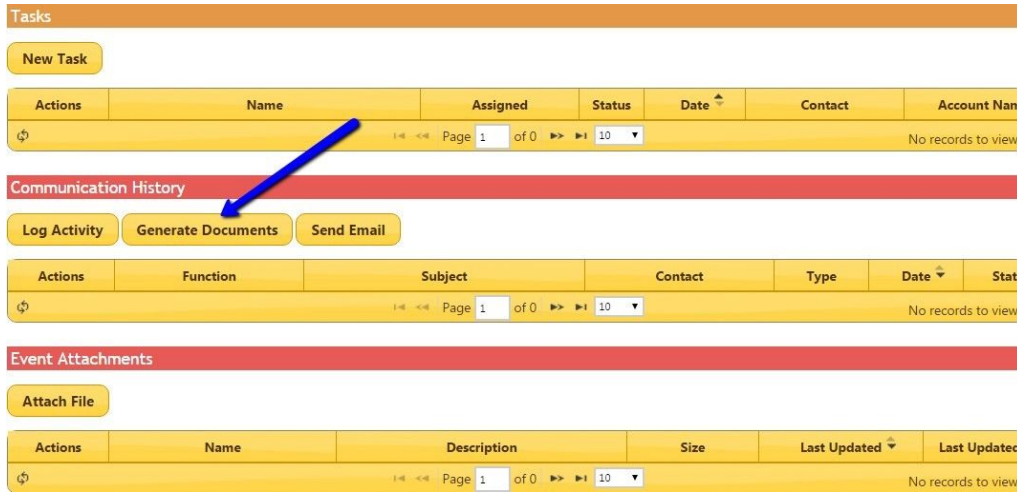
Template File Replace File 

Print Each Function on a Separate Page

Save Cancel

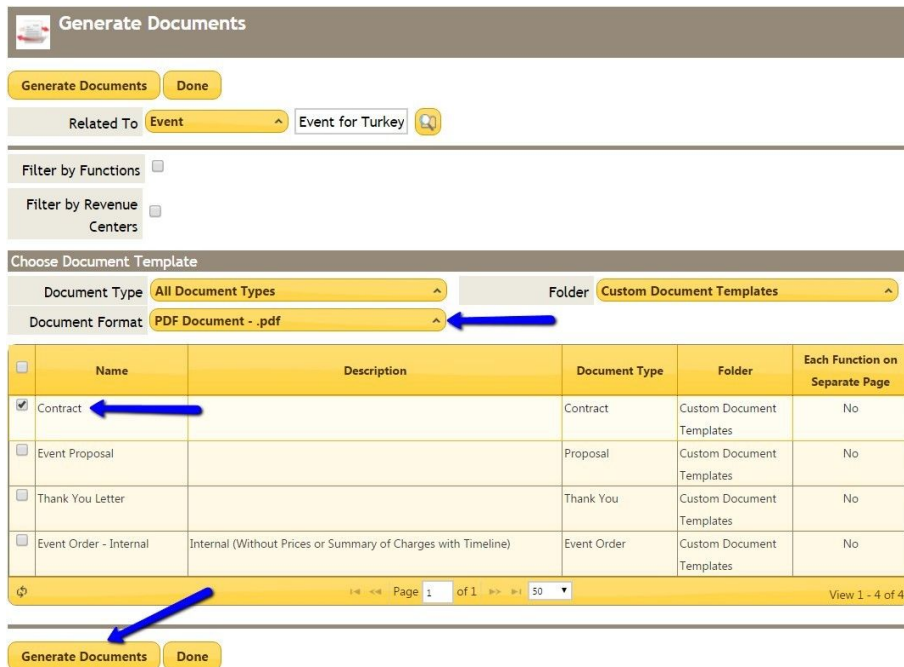
Testing the Edited Document Template

After replacing the **document template** with the version you edited, you can **test** the **template** by **generating it from any event**. Start by navigating to the **Event Details Page** of any **event** and **scrolling** down to the **Communication History** area. **Click Generate Documents**.



The screenshot shows three sections: 'Tasks', 'Communication History', and 'Event Attachments'. Each section has a 'New Task' or 'Attach File' button and a table with columns for Actions, Name, Assigned, Status, Date, Contact, and Account Name. The 'Communication History' section has buttons for 'Log Activity', 'Generate Documents', and 'Send Email'. A blue arrow points from the 'Generate Documents' button in the 'Communication History' section to the 'Generate Documents' button in the 'Event Attachments' section.

Choose a **Document format (PDF or Word)** and then **select** the **document** you wish to generate. **Click the Generate Documents button**.



The 'Generate Documents' dialog box shows the following options:

- Generate Documents Done
- Related To: Event (Event for Turkey)
- Filter by Functions
- Filter by Revenue Centers
- Choose Document Template:
 - Document Type: All Document Types
 - Folder: Custom Document Templates
 - Document Format: PDF Document - .pdf

<input type="checkbox"/>	Name	Description	Document Type	Folder	Each Function on Separate Page
<input checked="" type="checkbox"/>	Contract		Contract	Custom Document Templates	No
<input type="checkbox"/>	Event Proposal		Proposal	Custom Document Templates	No
<input type="checkbox"/>	Thank You Letter		Thank You	Custom Document Templates	No
<input type="checkbox"/>	Event Order - Internal	Internal (Without Prices or Summary of Charges with Timeline)	Event Order	Custom Document Templates	No

Generate Documents Done

If you find that there are still further edits you would like to make, start the process over again from the beginning and make any additional changes as necessary. Retest the document after each replacement.

December 1, 2016

Tom Turkey
1234 Waddle Way
Suite 200
Springfield OH 12345

Dear Tom:

Thank you for selecting **The Grand Key Club** Center for your upcoming event. I am pleased to confirm the following tentative reservation:

Event for Turkey Day Bowl-a-thon					
Date	Time	Location	Setup Style	Function	#
Thu, 1/26/17	11:00am - 3:00pm	Lane 1/Lane 2/Dining Room	U-Shape	Buffet Dinner Turkey Day Bowl-a-thon	75

To confirm this reservation on a definite basis, please sign and return this letter along with a deposit of \$500.00 by **12/30/16**. Please note the Terms and Conditions attached to and made a part of this agreement.

I look forward to working with you to make this a very successful event. If you have any questions, please don't hesitate to call.

Sincerely,

Keith

Keith Ewell

P: (777) 123-4567

F: (777) 888-9999

Confirmation Signature: _____ Date: _____

FAQs

Q: Can we get the **BEO** information to fit on 1 page?

A: The length of the **BEO** depends on the amount of information in the event. The more information, the longer the **documents**.

Q: Can I remove part or all of the club information or logo to the top of the **Internal BEO**?

A: You can remove as much or as little information as you would like. We suggest keeping the event name merge field so it is easy to tell what the event is. This can even be placed in the header of the document.

Best Practices

1. When generating a new template, give the new document a new name.
2. Write revised before the document title (ie - Revised - Contract)
3. Test the document after making changes to make sure that all the information is showing where you want it to be showing.