Banquets - Booking a New Event

2016 - Winter Edition

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Overview

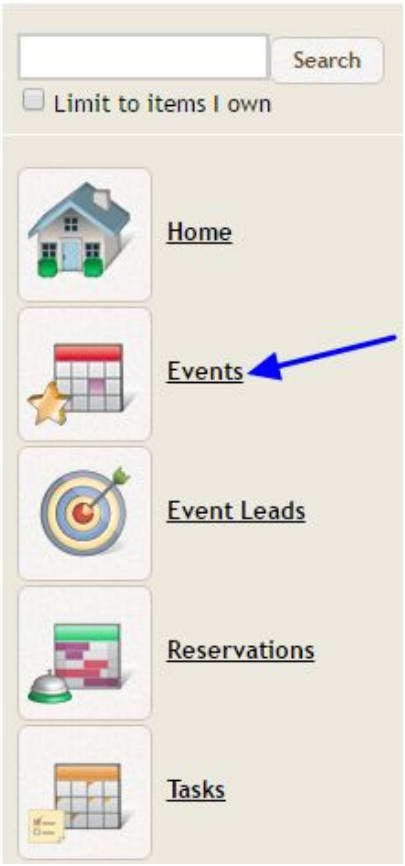
The first step in **managing an event** is to **create** the actual **event** to be managed. This guide will walk you through **creating or booking the original event.**

Use Case(s)

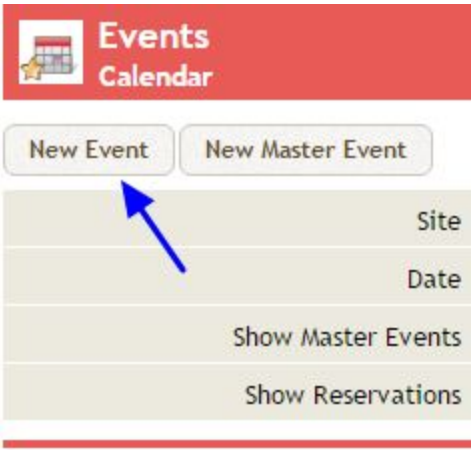
Mr. and Mrs. Rogers would like to host their wedding at the Club next July 15. To ensure the **event** gets on the **calendar**, and can be managed, the **Banquets Manager books the event.**

Step by Step: Booking an Event

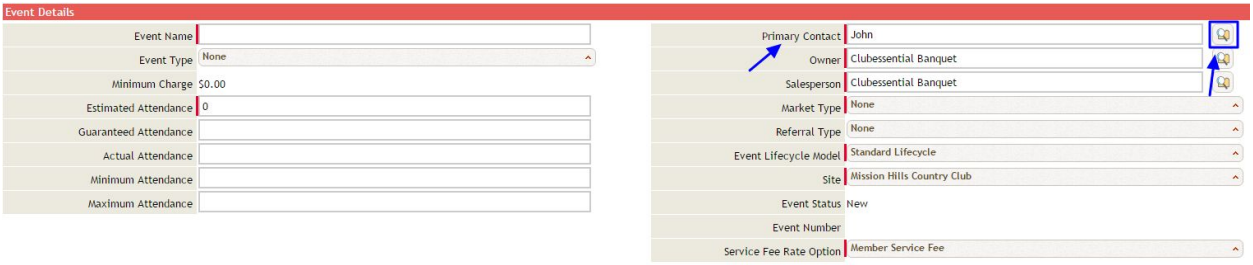
Click on **Events Icon**.



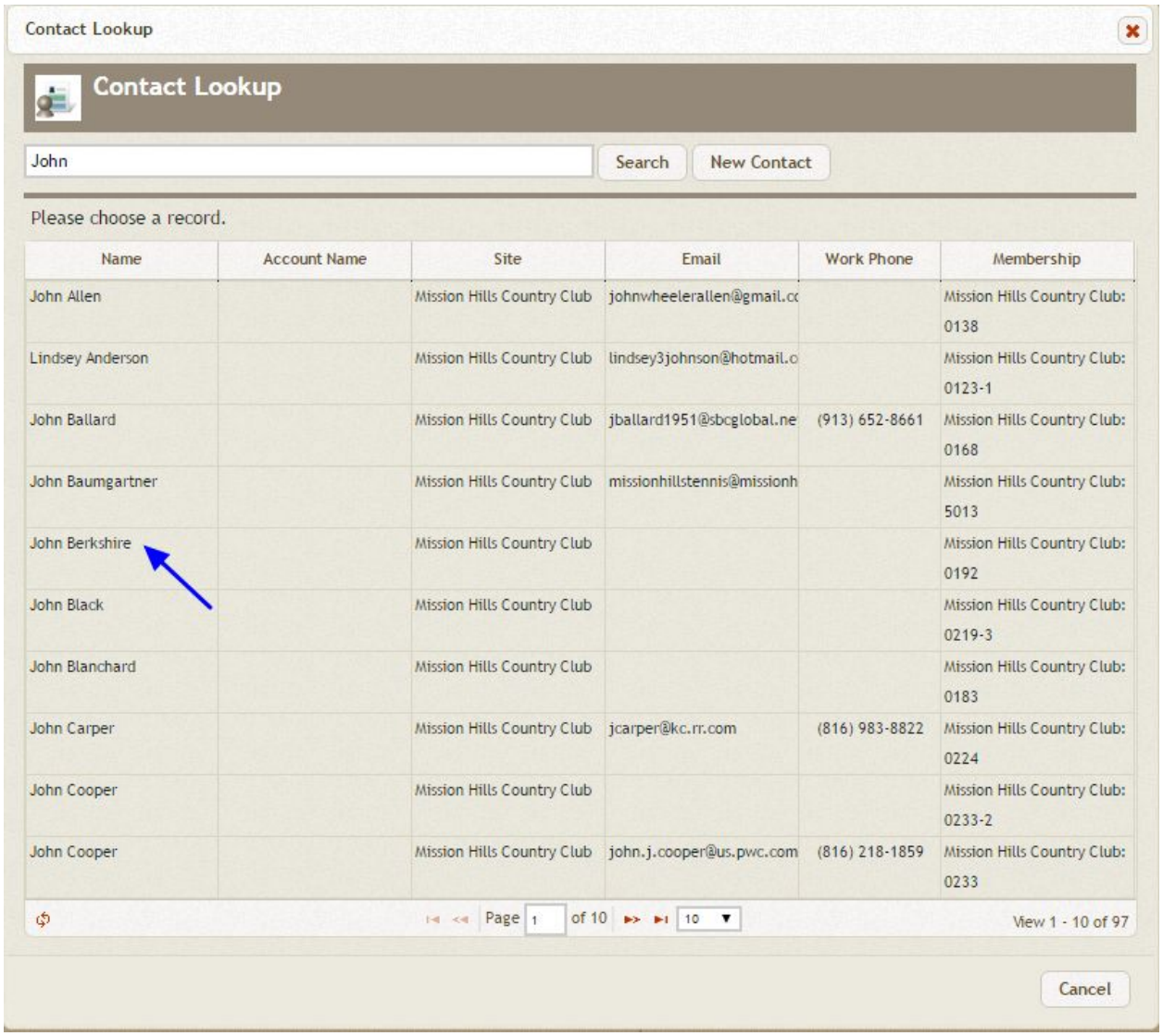
Click on **New Event**.



Type Primary Contact's First and Last Name in the **Contact Field**. **Click Search**.



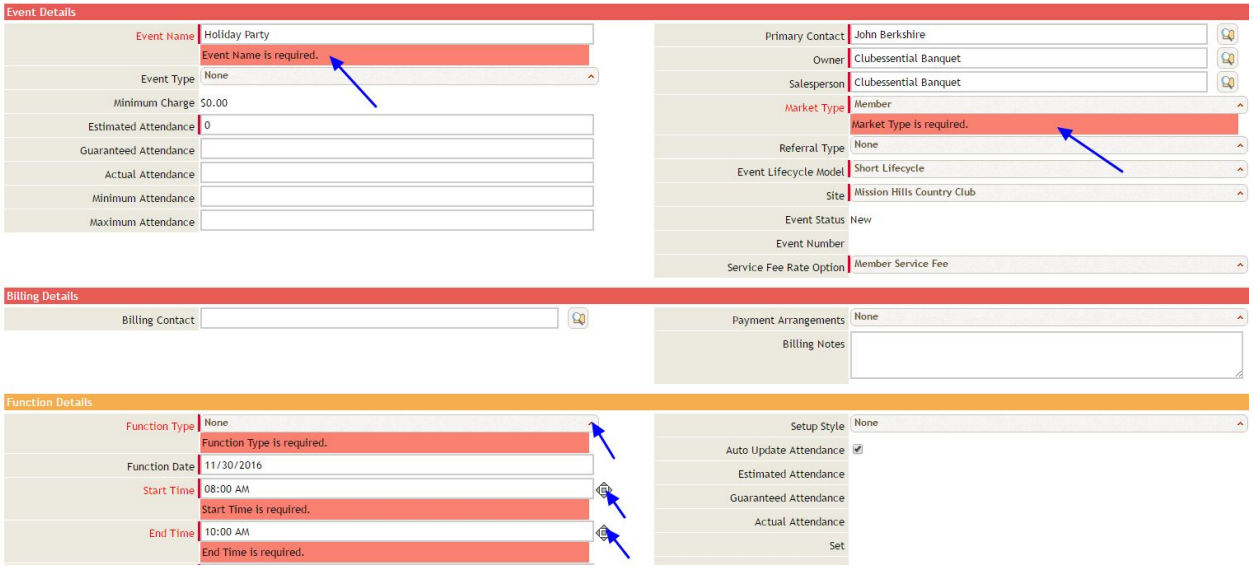
If Contact record is found, **click** on their **name** to **select**.



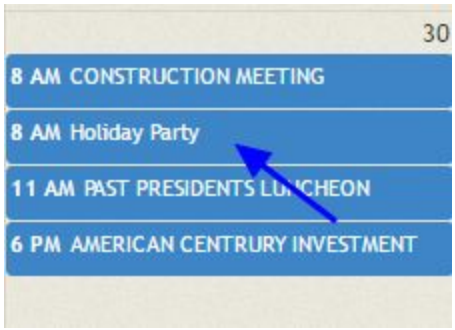
If Contact record is not found, **add contact** in **Office as a new member** and wait for member to sync over to Banquets. For a step by step to do this follow this link. [Click here for New Member Wizard]

Enter the remaining **Event (red banner)** and **Function (gold banner)** information. **Click Save**.

- **Required Event** and **Function** fields are indicated with a **red vertical bar.**
- If additional functions are needed, **click Save** and **New Function**.



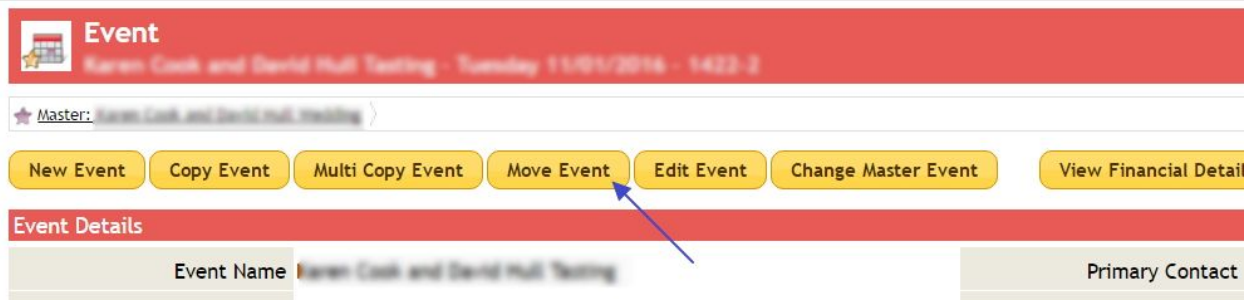
The **Event** will now appear in the **Calendar**.



FAQs

Q. How do I move an event to a different date or time?

A: When in the calendar view, you can drag and drop the event to the new day. When in the event, you can click on Move Event and follow the provided steps.



Best Practices

1. Add your contacts in Office and let them sync over to Banquets.
2. Make sure the owner for the contact says GATEWAY_AGENT, if it doesn't the information won't come into Office.