

# Banquets - Booking a New Event

2016 - Winter Edition

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## Overview

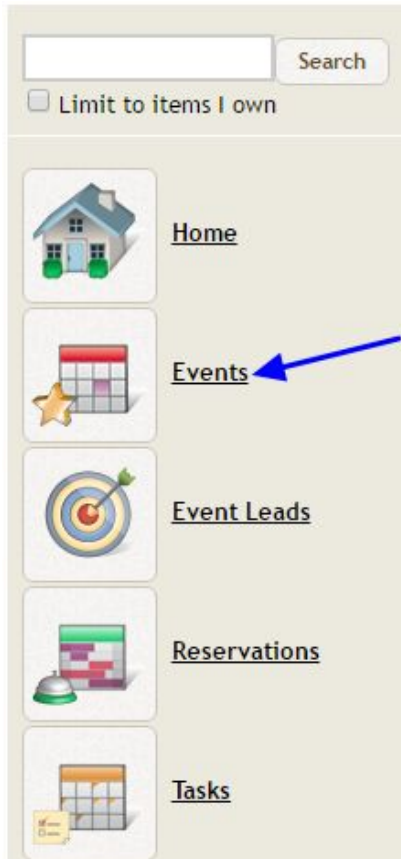
The first step in **managing an event** is to **create** the actual **event** to be managed. This guide will walk you through **creating or booking the original event**.

## Use Case(s)

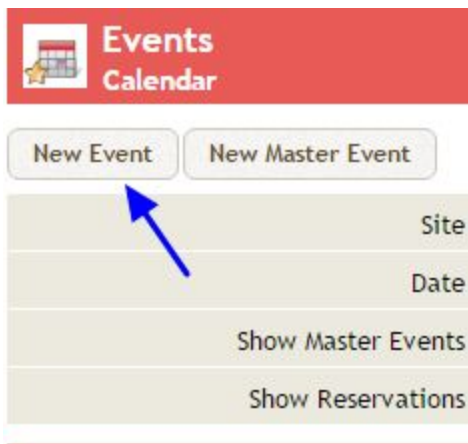
Mr. and Mrs. Rogers would like to host their wedding at the Club next July 15. To ensure the **event** gets on the **calendar**, and can be managed, the **Banquets Manager books the event**.

# 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.

**Event Details**

Event Name	<input type="text"/>
Event Type	None
Minimum Charge	50.00
Estimated Attendance	0
Guaranteed Attendance	<input type="text"/>
Actual Attendance	<input type="text"/>
Minimum Attendance	<input type="text"/>
Maximum Attendance	<input type="text"/>

Primary Contact	John
Owner	Clubessential Banquet
Salesperson	Clubessential Banquet
Market Type	None
Referral Type	None
Event Lifecycle Model	Standard Lifecycle
Site	Mission Hills Country Club
Event Status	New
Event Number	<input type="text"/>
Service Fee Rate Option	Member Service Fee

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

**Contact Lookup**

John

Please choose a record.

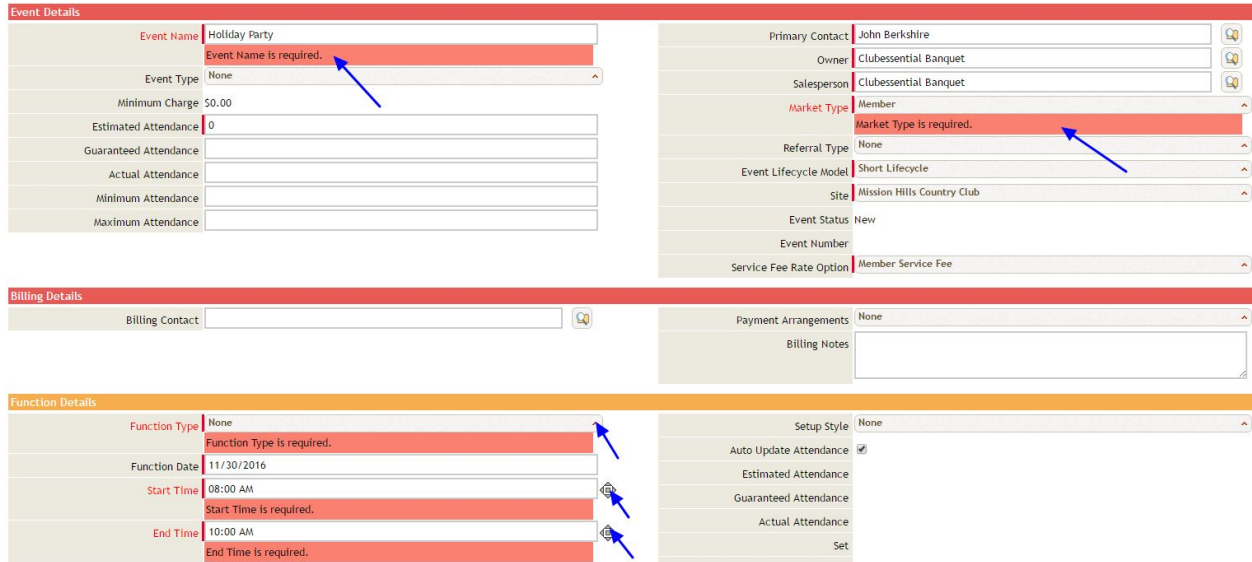
Name	Account Name	Site	Email	Work Phone	Membership
John Allen		Mission Hills Country Club	johnwheelerallen@gmail.co		Mission Hills Country Club: 0138
Lindsey Anderson		Mission Hills Country Club	lindsey3johnson@hotmail.co		Mission Hills Country Club: 0123-1
John Ballard		Mission Hills Country Club	jballard1951@sbcglobal.net	(913) 652-8661	Mission Hills Country Club: 0168
John Baumgartner		Mission Hills Country Club	missionhillstennis@missionh		Mission Hills Country Club: 5013
John Berkshire		Mission Hills Country Club			Mission Hills Country Club: 0192
John Black		Mission Hills Country Club			Mission Hills Country Club: 0219-3
John Blanchard		Mission Hills Country Club			Mission Hills Country Club: 0183
John Carper		Mission Hills Country Club	jcarper@kc.rr.com	(816) 983-8822	Mission Hills Country Club: 0224
John Cooper		Mission Hills Country Club			Mission Hills Country Club: 0233-2
John Cooper		Mission Hills Country Club	john.j.cooper@us.pwc.com	(816) 218-1859	Mission Hills Country Club: 0233

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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**.



**Event Details**

Event Name	Holiday Party	Primary Contact	John Berkshire
Event Type	None	Owner	Clubessential Banquet
Minimum Charge	\$0.00	Salesperson	Clubessential Banquet
Estimated Attendance	0	Market Type	Member
Guaranteed Attendance		Referral Type	None
Actual Attendance		Event Lifecycle Model	Short Lifecycle
Minimum Attendance		Site	Mission Hills Country Club
Maximum Attendance		Event Status	New
		Event Number	
		Service Fee Rate Option	Member Service Fee

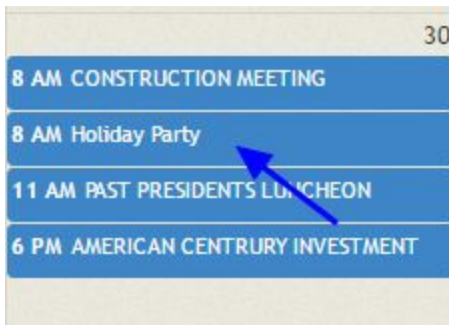
**Billing Details**

Billing Contact		Payment Arrangements	None
		Billing Notes	

**Function Details**

Function Type	None	Setup Style	None
Function Date	11/30/2016	Auto Update Attendance	<input checked="" type="checkbox"/>
Start Time	08:00 AM	Estimated Attendance	
End Time	10:00 AM	Guaranteed Attendance	
		Actual Attendance	
		Set	

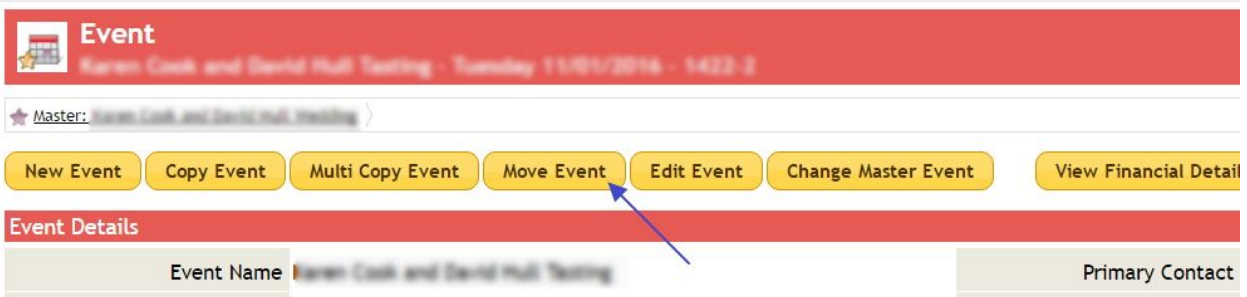
The **Event** will now appear in the **Calendar**.



## 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.

