Banquets - Managing the Document Center

2016 - Winter Edition

User Guide - Table of Contents

Overview

The **Document Center** is a repository for storing **images** such as **logos** and **documents** that do not need to pull event or contact specific information. Examples might include such things as informational packets or menus. Images and documents stored here can be attached to emails and sent to clients. **The Document Center** makes storing shared information simple and convenient.

Use Case(s)

The Banquet Manager uploaded a photo of the reception area as it is today, as well as a rendition of the area as it will be on the day of the reception to the Document Center. The Manager then sent an email to the Client and attached the documents from the Document Center for the client's reference. The documents will be easily accessible in the future, in the event changes need to be made to the layout and/or the documents need reviewed.

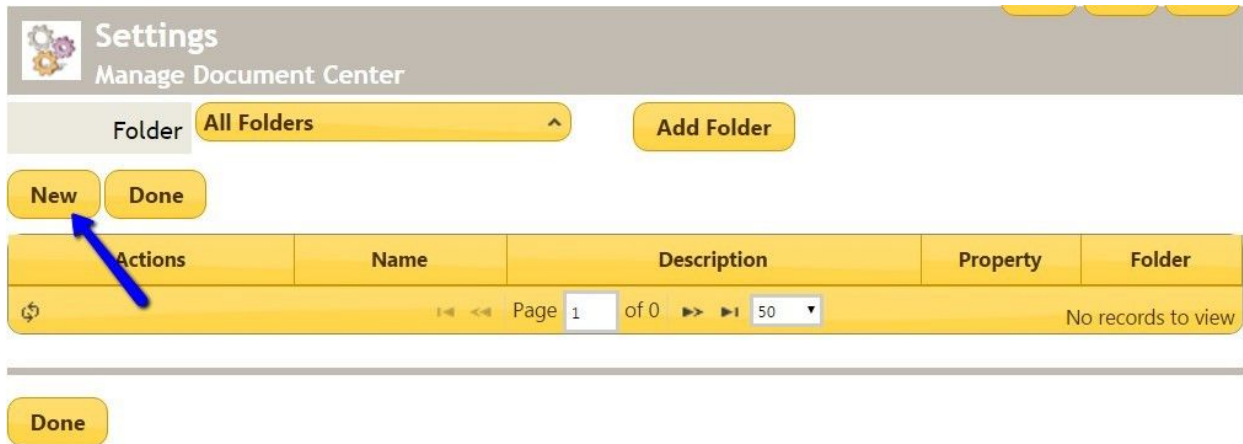# Accessing the Tool

Navigate **Settings, click Correspondence.**
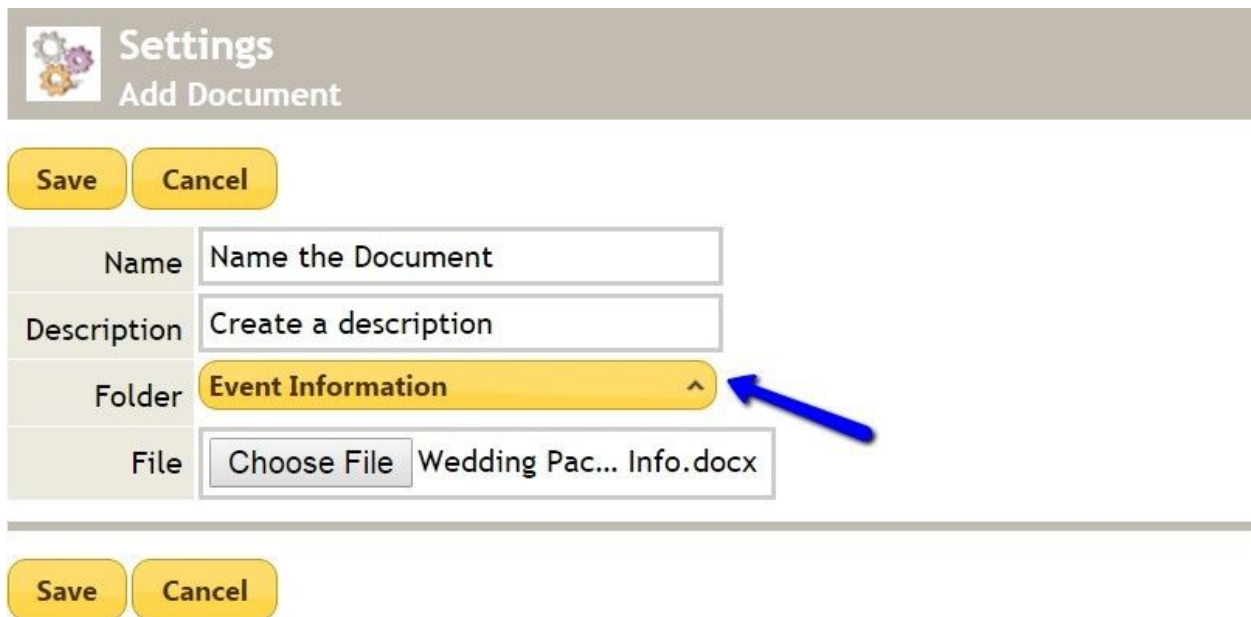

Select **Manage Document Center.**
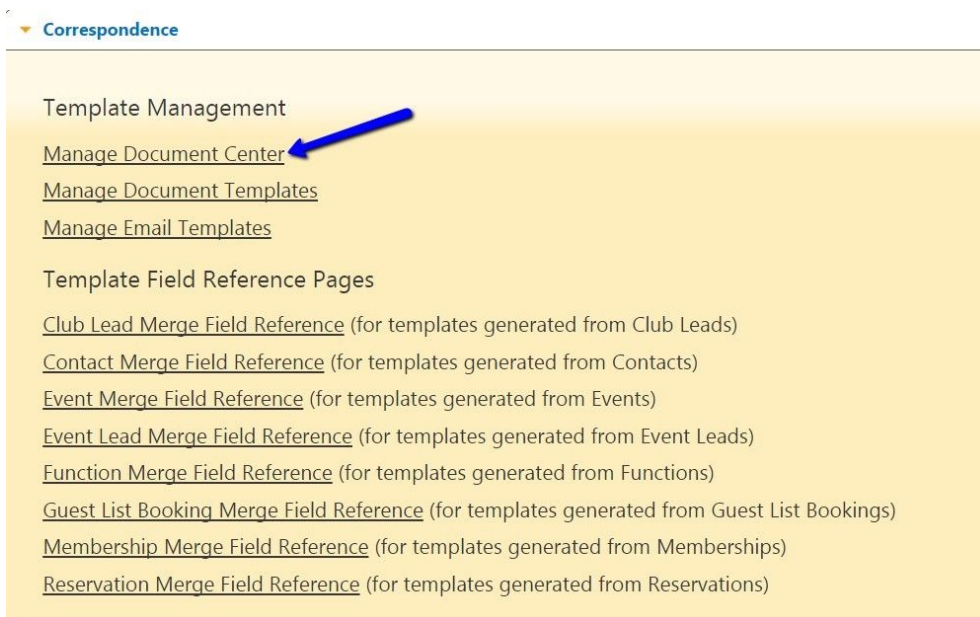
Adding Documents

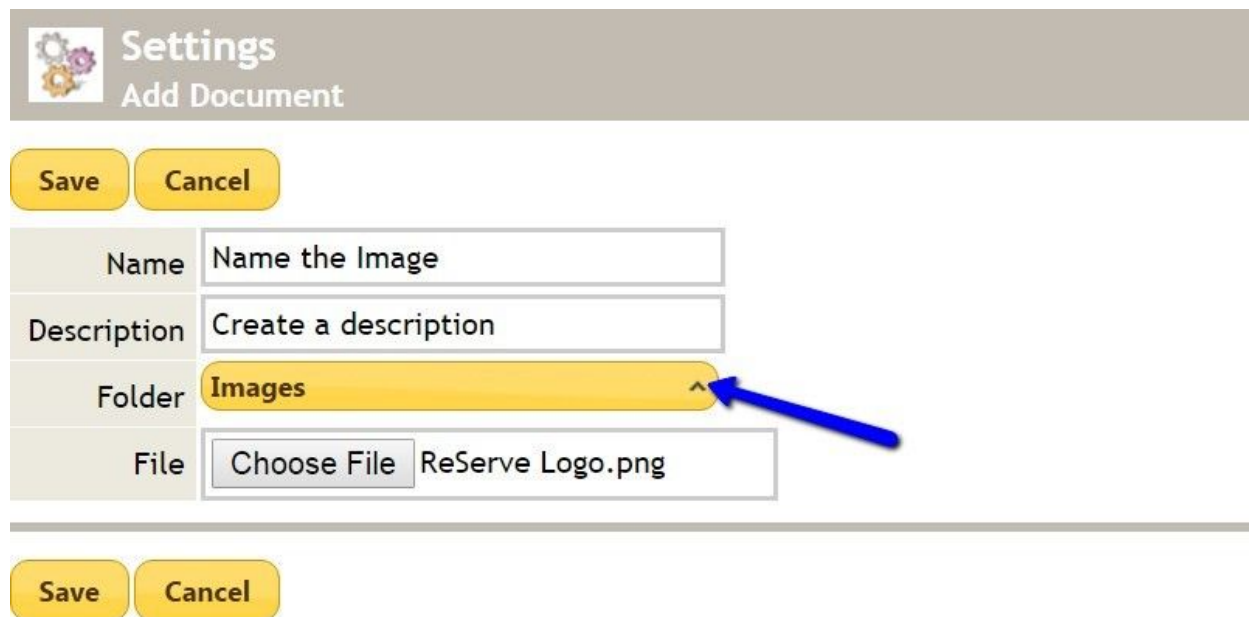**Click** on the **New** button.

You will now be prompted to **name** your **document** and give it a **description**. You must choose a **folder** for it to live in, and then you can **click** the **Choose File** button to **browse** your computer for the **file**.

When you have finished, **click Save**.

Adding Images

To **add** an **image** to the **Document Center**, follow the same process as above until you reach the step where you can name your image and choose the file.

You **MUST** choose the **Images folder** to **store** and **resize** any **images.** When you have finished, **click Save**.

You can now **resize** the **image**. To do this, **click** on the **Resize** link next to the **image's name.**

Settings
Manage Document Center

| Folder | All Folders | ^ | Add Folder |

New   Done

Actions	Name	Description	Property	Folder
Edit | Delete | Resize	ReServe Logo		Default Property	Images
Edit | Delete	Wedding Packet	Information Packet for Customer	Default Property	Event Information

|⏴ ⏪ Page 1 of 1 ⏩ ⏵| 50 ▾   View 1 - 2 of 2

Done

Resize the **image** by either **dragging** the **handle** at the **bottom** corner of the **image.**

Settings
Resize Image

To resize the image, drag the lower left corner of the image to the desired size and then press Save. The right side and bottom of the image can also be dragged.

Save   Cancel

| Width | 348.9230769230769 |
| Height | 112 |

Save   Cancel

Alternately, enter a specific **height and width** to **resize** the image in the **width and height** boxes.

Click Save once finished.

FAQs

Q. Why won't my **image save**?

A: To **save** an **image** you need to make sure that you are **saving** to the **Image Folder.**

Best Practices

1. Provide the document/image a meaningful name, so opening it will not be necessary to determine its identity (i.e. Fall 2017 Menu (Meaningful) vs Menu (Not Meaningful)).

2. Establish a naming convention for your folder structure so that the documents are easy to locate.