

History Reporting: Knowing When a Document is Added to an Event

Updated: October 22, 2015

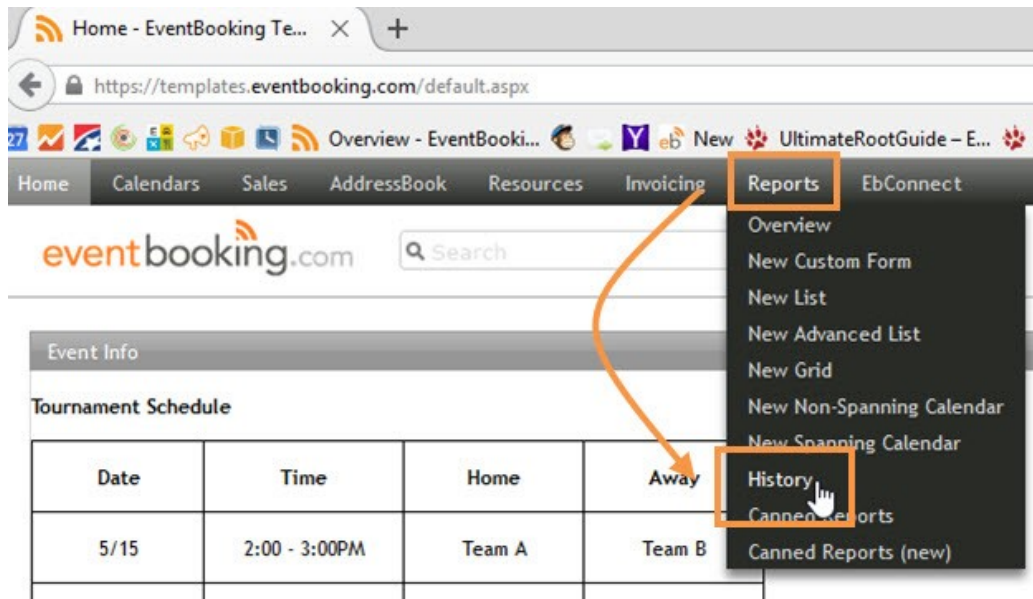
You are able to create a history preset which searches for events which have had documents attached within a certain time frame, for example, within the past week or month.

This preset can also be used to receive an email alert whenever a document is attached to an event.

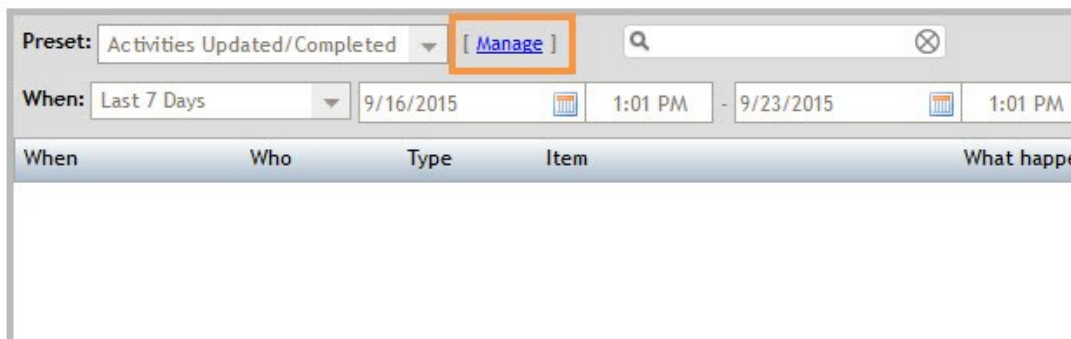
Creating the history preset.....	2
Running a history report.....	7
Creating an alert.....	9

CREATING THE HISTORY PRESET

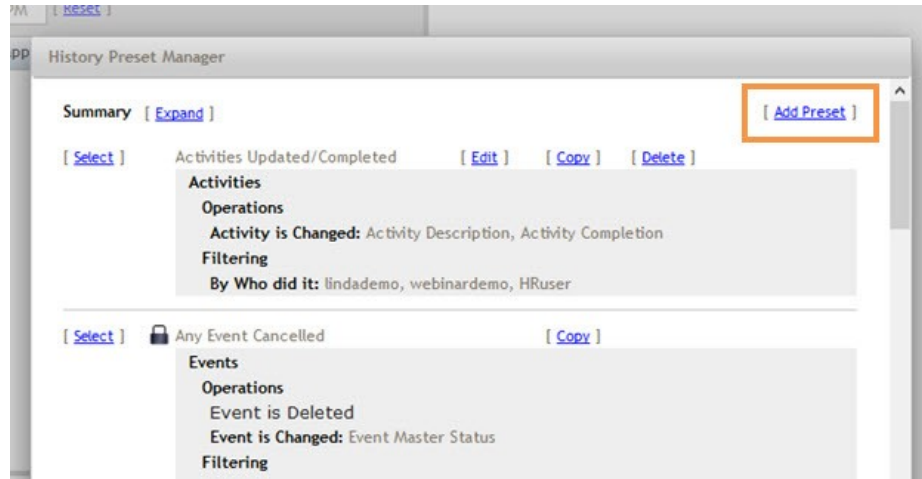
1. Hover over *Reports* and click on *History*.



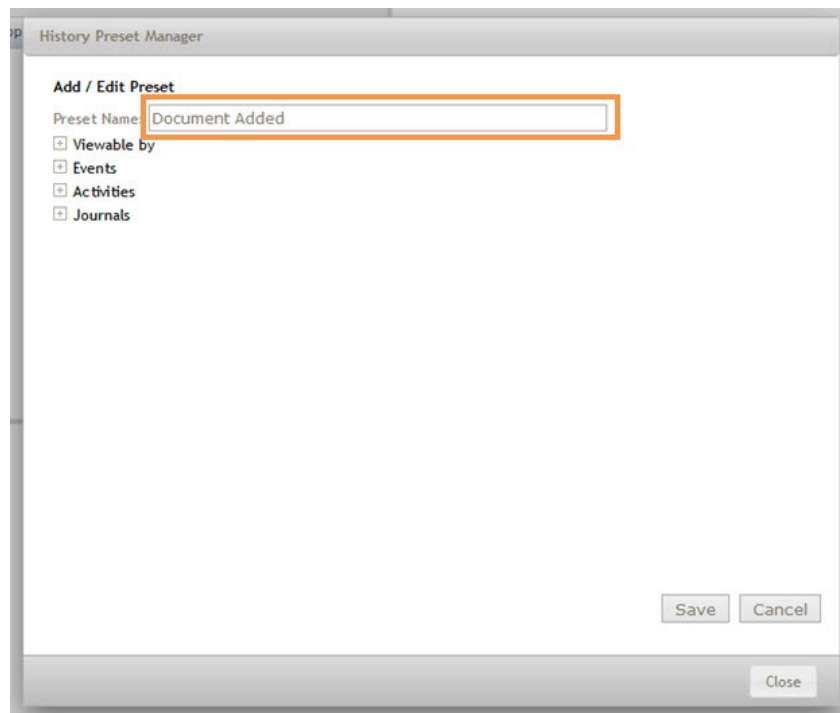
2. Click the blue *Manage* link to open your history preset manager.



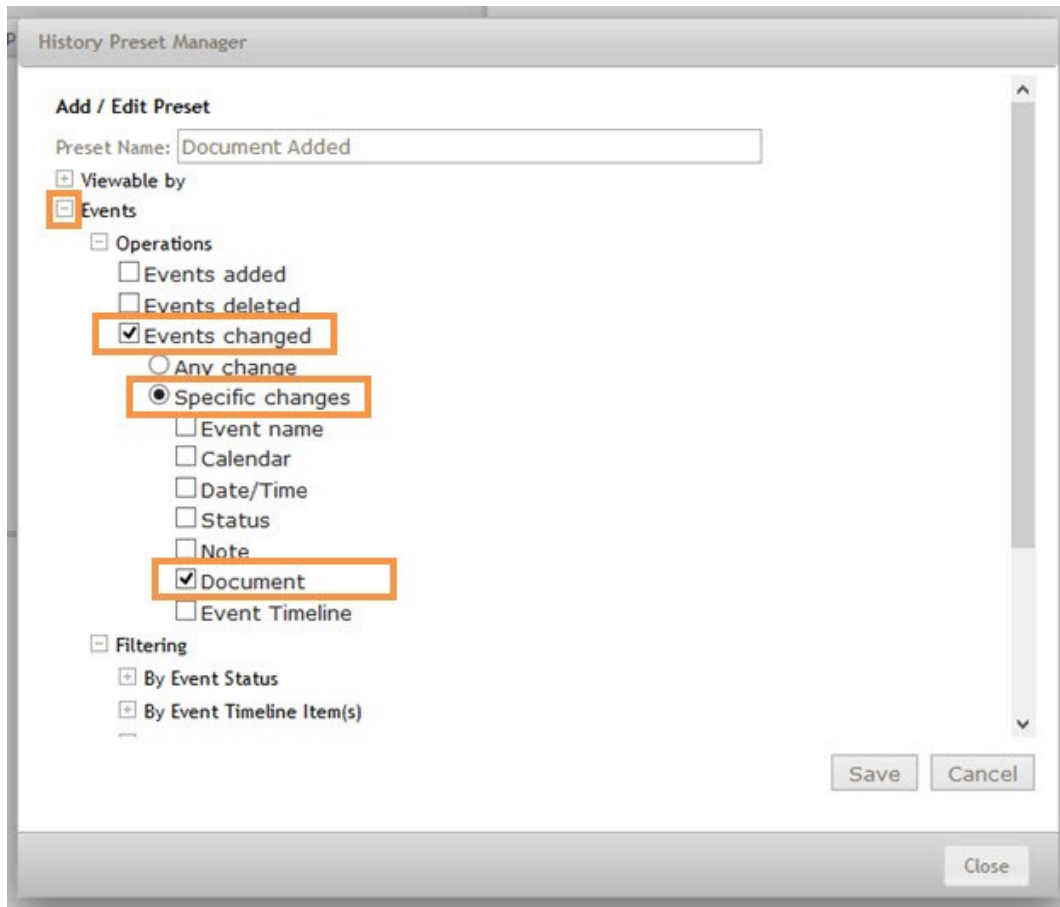
3. Click *Add Preset* in the upper right corner of the pop up.



4. Name your preset.



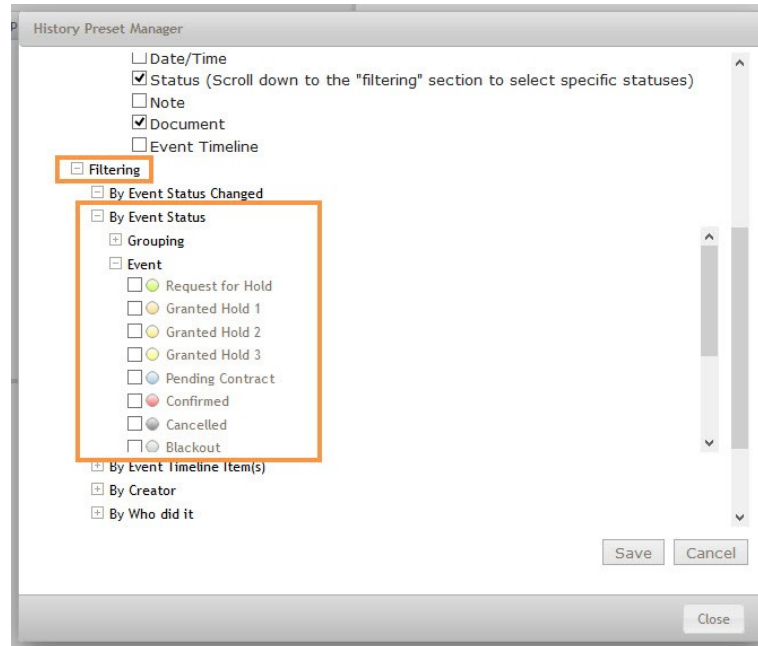
5. Click on the plus by *Events* to expand the menu and choose *Events changed*, then choose *Specific changes*, then choose *Document*.



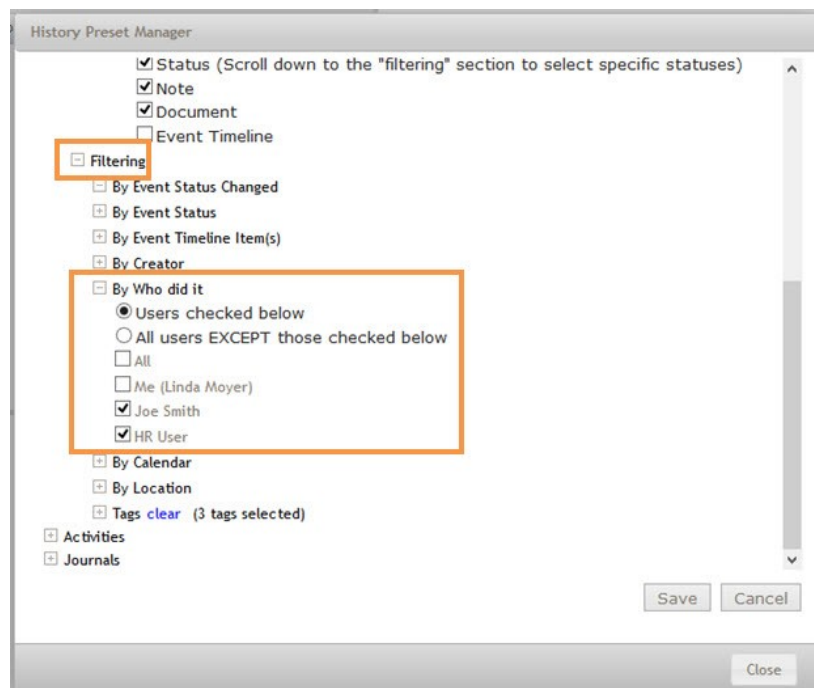
6. If you would like to receive an alert when a document is uploaded to any event, click *Save*. You can then [run your history report](#) or [create an alert](#).

7. You are also able to select only certain events to receive alerts about. To see the options, click on the plus by *Filtering*. For example, you can:

- Filter by the status of the event:



- Filter by who added the document:



- Filter by the Event Type, or other tag group:

History Preset Manager

By Location

Tags [clear](#) (3 tags selected)

Event

Lead Source

Performance Manager

Production Coordinator

Room Setup Type

Tax Exempt

Timeline Type

Type

☐ Ceremony ☐ Church - Internal ☐ Concert ☐ Funeral ☐ Meeting ☐ Men's Club
☐ Outside Corporate/NonProfit/Meeting ☒ Reception ☐ Women's Club ☐ Wedding
☒ Convention ☐ In-House ☐ Family Show ☐ Job Fair ☐ Sporting Event ☐ Theatre
☐ Transient ☐ Unspecified ☐ Knox Roller Girls ☐ Private Event ☐ Fire Practice
☐ Red Wings Practice ☐ Academy Training ☐ J-Pop ☐ Consumer ☐ K-Pop ☐ Comedy
☐ Comedy ☐ Funeral ☒ Wedding ☐ Church - Internal ☐ XYZ Club ☐ Reception
☐ Women's Club ☐ XYZ Club

Sales

Activities

Journals

Save Cancel

Close

8. Once you have selected your filtering options, click **Save**. Your preset has been created.

[[Select](#)] Document Added [[Edit](#)] [[Copy](#)] [[Delete](#)]

Events

Operations

Event is Changed: Event Document

Filtering

By EventStatus:

Current Status:

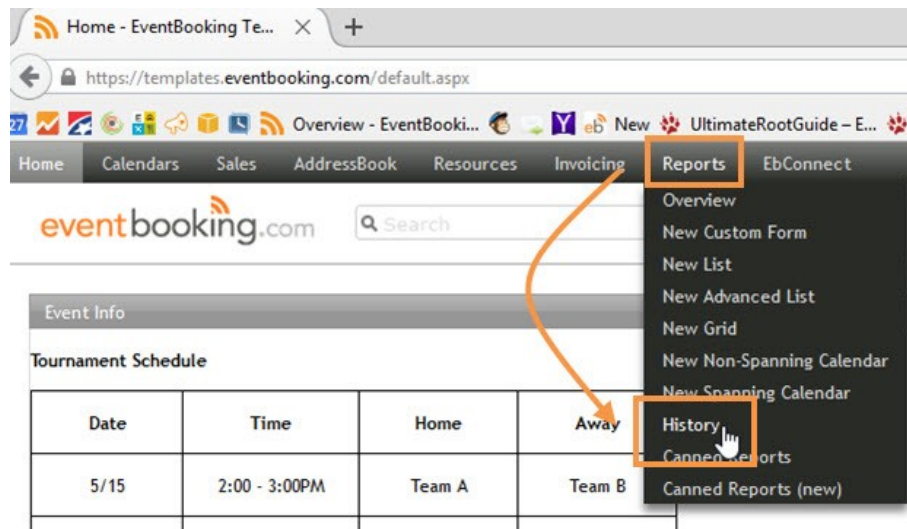
Event:

☐ Pending Contract, ☒ Confirmed

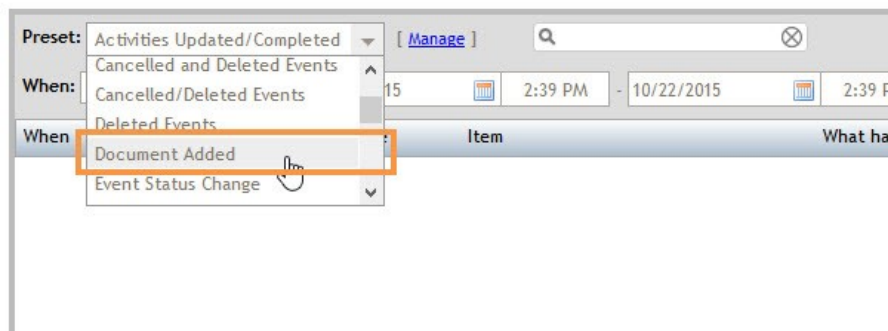
RUNNING A HISTORY REPORT

To search for events to which documents have been added:

1. Go to History > Reports.



2. Choose your history preset from the *Preset* drop down.



3. Choose your date range. You may search the last 7 days, last 30 days, or choose *Specific Date Range* to be able to select a specific date range using the date picker (you are limited to a 31-day span in each search). Once you have chosen your date range, click *Search*.

Preset: Document Added [Manage] [X]

When: Last 7 Days [10/15/2015 2:39 PM - 10/22/2015 2:39 PM] [Reset]

When: Last 7 Days
Last 7 Days
Last 30 Days
Specific Date Range

Type Item What happened

Search

4. Events which had documents added within your time frame will be listed.

Preset: Document Added [Manage] [X]

When: Specific Date Range [2/1/2015 2:39 PM - 2/28/2015 2:39 PM] [Reset]

When	Who	Type	Item	What happened
2/26/2015 10:03 AM	Joe Smith	Event	Private Party (CONF, 2/24/2015 9:00 AM (14hrs 59min), ID:6958)	Added Event Document (Invoice Proposal)
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document (1st draft)
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document (Work order proposal...)
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document ()
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document ()
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document (Event Report Draft)

6. To export your search range results to Excel, click the Excel icon by the Search button.

Preset: Document Added [Manage] [X]

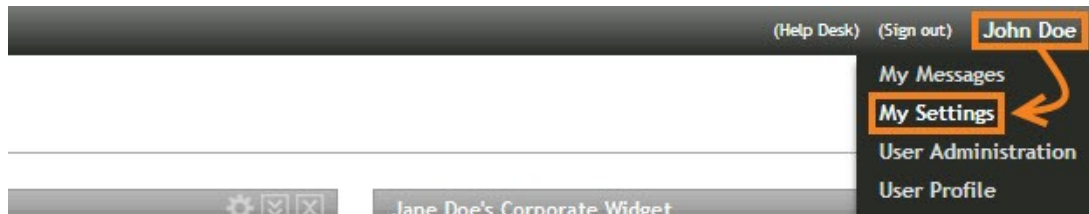
When: Specific Date Range [2/1/2015 2:39 PM - 2/28/2015 2:39 PM] [Reset]

When	Who	Type	Item	What happened
2/26/2015 10:03 AM	Joe Smith	Event	Private Party (CONF, 2/24/2015 9:00 AM (14hrs 59min), ID:6958)	Added Event Document (Invoice Proposal)
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document (1st draft)
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document (Work order proposal...)
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document ()
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document ()
2/4/2015 6:34 AM	Joe Smith	Event	2015 EB Banquet (CONF, 9/14/2015 12:00 PM (4days 30min), ID:6996)	Added Event Document (Event Report Draft)

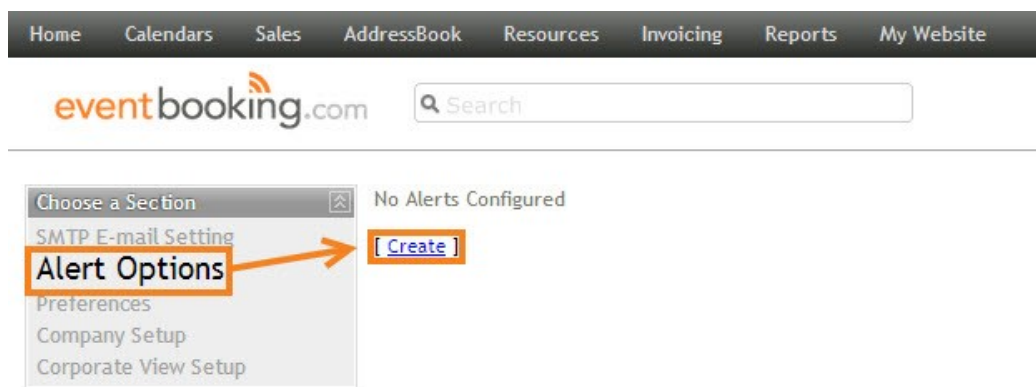
CREATING AN ALERT

If you would like to receive an email alerting you when a document has been added to an event, you can create an alert using your history preset. You may choose to receive the email when the document is added (you'll receive the alert within about 20 minutes) or a batch report daily, weekly, or monthly.

1. Hover over your name in the upper right corner of your account and click *My Settings*.



2. On the left side of your browser window, click *Alert Options*, then click *Create*.



3. Name your alert, and then choose your history preset from the drop down menu.

Add / Edit Alert

Name of alert: Document Added

History Preset:

- None [Manage]
- Cancelled/Deleted Events
- Deleted Events
- Document Added (com)*
- Event Status Change
- Event that have Confirmed
- Events Added

☒ Immediately
☐ Specified time

Save Cancel

4. Choose the email address where you would like to receive the alert. You are able to add additional email addresses to your account (for instance, a distribution list such as "sales@yourvenue.com") in your [User Profile](#).

Add / Edit Alert

Name of alert: Document Added

History Preset:

Document Added [Manage]

Where to send:

☒ Main (linda@eventbooking.com)*
* = primary email address

How often to send:

☒ Immediately
☐ Specified time

Save Cancel

5. Choose how often you would like to receive the alert: *Immediately* (usually within 20 minutes of the event being deleted) or a digest email at a specified time. If you choose *Specified time*, set your start date, the time you would like to receive the alert, and your repeat interval. Click *OK*, then click *Save*.

Add / Edit Alert

where to send:

☒ Main (linda@eventbooking.com)*
* = primary email address

How often to send:

☐ Immediately
☒ Specified time

Start: 10/22/2015 12:00 AM

Repeats: Weekly

10/22/2015 12:00 AM, Repeats every week(s) on Friday

Repeat every: 1 Weekly

Repeat on: ☐ S ☐ M ☐ T ☐ W ☐ T ☒ F ☐ S

☐ End: Never

OK Cancel

Save Cancel

6. Your alert has been created.

Document Added [\[Edit \]](#) [\[Delete \]](#)

When: 10/22/2015 12:00 AM, Repeats every week(s) on Friday

History Preset: Document Added

Events

Operations

Event is Changed: Event Document

Filtering

By EventStatus:

Current Status:

Event:

☐ Pending Contract, ☒ Confirmed
