

# Sending a Hold Confirmation

Updated: October 6, 2016

When you book holds, you may wish to send a confirmation document to the client or promoter you are working with. We have a standard form which you are able to download as a PDF or email directly from your EB account.

There is a confirmation for a single event:



## EB Arena Hold Confirmation

**Event Name:** Walter James Trade Show  
**Event ID:** 12587  
**Venue:** Ballroom, Function Room 1, Function Room 2, Function Room 3, Function Room 4  
**Date:** 2/20/2017 Monday  
**Status:** Granted Hold 1

As well as a confirmation for a grouping:



## EB Arena Hold Confirmation

**Grouping Name:** Billy Joel  
**Grouping ID:** 6264  
**Venue:** Arena

Event Name	Date	Day of Week	Status
Billy Joel	2/9/2017	Thursday	Granted Hold 1
Billy Joel	2/10/2017	Friday	Granted Hold 1
Billy Joel	2/11/2017	Saturday	Granted Hold 1
Billy Joel	2/17/2017	Friday	Granted Hold 3
Billy Joel	2/18/2017	Saturday	Granted Hold 1
Billy Joel	2/19/2017	Sunday	Granted Hold 2

*Please note that this is a standard document. If you would prefer a different layout or to include additional information, contact us and we can supply a quote for a custom project.*

## To create and send your confirmation:

1. Go to the details page of the event or the grouping for which you would like the confirmation form.
2. In the left sidebar under "Reports and Forms", click *Hold Confirmation* or *Grouping Confirmation*:

The screenshot displays the user interface for an event management system. On the left is a sidebar with three sections: 'Reports and Forms', 'Last Viewed', and 'Most Viewed'. In the 'Reports and Forms' section, the 'Hold Confirmation' option is highlighted with an orange box. The 'Last Viewed' section lists five items, with the first one, '1. Walter James Trade Show', being the current view. The 'Most Viewed' section lists six items, including 'Guys & Dolls' and 'Lead & Succeed Day 1 Seminar'. The main content area on the right is titled 'Walter James Trade Show : Event (id=12587)'. It contains several fields: 'Event Name' (Walter James Trade Show), 'Spaces Used' (Ballroom, Function Room 1, Function Room 2 (2 more)), 'When' (2/20/2017 8:00 AM (Mon) - 2/22/2017 11:59 PM (Wed)) with links for 'Move' and 'View Calendar', 'Status' (Granted Hold 1), 'Type' (Consumer), 'Avails Display' (Show only the color (no text)), and 'Grouping' (Could not locate parent). At the bottom of the main area are tabs for 'Functions/Spaces', 'Timeline', 'Activities/Journals', 'Notes', and 'Documents'. Below the tabs is a 'Price Schedule (select to apply rental rates)' section set to 'Current Year Pricing'. A 'Mass Edit' link is located at the bottom left of the main content area.

**Reports and Forms**

- cf Contract
- cf Estimate of Charges
- cf Event Order
- cf Event Sheet
- cf Hold Confirmation**
- cf Resources by Event w GL
- cf Show Advisory
- cf Testing
- cf testing

**Last Viewed**

- 1. Walter James Trade Show
- 2. Ron White
- 3. Ron White
- 4. Chris Young
- 5. Chris Young

**Most Viewed**

- (59) Guys & Dolls
- (47) Lead & Succeed Day 1 Seminar
- (41) 2016 EB Banquet
- (37) 2015 EB Banquet
- (16) Lead & Succeed Seminar

**Walter James Trade Show : Event (id=12587)**

**Event Name**  
Walter James Trade Show

**Spaces Used**  
Ballroom, Function Room 1, Function Room 2 (2 more)

**When** [Move](#) [View Calendar](#)  
2/20/2017 8:00 AM (Mon) - 2/22/2017 11:59 PM (Wed)

**Status**  
Granted Hold 1

**Type**  
Consumer

**Avails Display**  
Show only the color (no text)

**Grouping**  
Could not locate parent

**Functions/Spaces** **Timeline** **Activities/Journals** **Notes** **Documents**

**Price Schedule (select to apply rental rates)**  
Current Year Pricing

[Mass Edit](#)

OR

Event Family

09 Feb 8:00 AM - Billy Joel

09 Feb 8:00 AM - Billy Joel

10 Feb 8:00 AM - Billy Joel

11 Feb 8:00 AM - Billy Joel

17 Feb 8:00 AM - Billy Joel

18 Feb 8:00 AM - Billy Joel

19 Feb 8:00 AM - Billy Joel

Reports and Forms

☐ Filter Events
 

☒ Contract
 ☒ Estimate of Charges
 ☒ Event Sheet
 ☒ **Grouping Confirmation**
☒ Show Advisory

Last Viewed

1. Billy Joel

2. Walter James Trade Show

3. Ron White

4. Ron White

Billy Joel : Grouping (id=6264)

Grouping Name

Billy Joel

Spaces Used

Arena

Date Range

[Move](#)
[View Calendar](#)

2/9/2017 8:00 AM (Thu) - 2/19/2017 11:59 PM (Su)

Status

Request for Hold

Type

Not Set

Child Events

Notes

Time Line

Activities

Do

Mass Edit

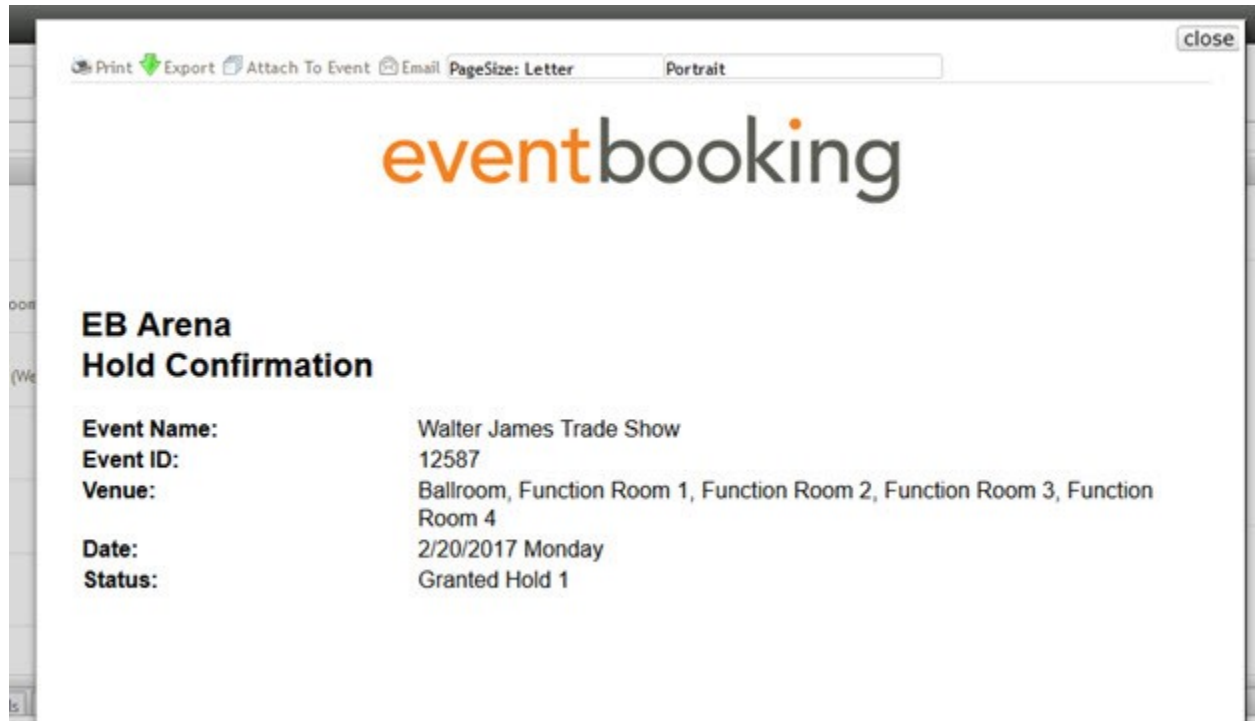
Mass Edit When

Name	Where	When
<a href="#">Billy Joel</a>	Arena	2/9/2017 8:00 AM - 11:59
<a href="#">Billy Joel</a>	Arena	2/10/2017 8:00 AM - 11:5
<a href="#">Billy Joel</a>	Arena	2/11/2017 8:00 AM - 11:5
<a href="#">Billy Joel</a>	Arena	2/17/2017 8:00 AM - 11:5

If you do not see the confirmation forms listed on your account, please contact us at [support@eventbooking.com](mailto:support@eventbooking.com) or 865-966-4900 and we will get them set up for you.

3. A preview will pop up. From this preview you will be able to:

- Export a PDF
- Email a PDF from your EB account
- If you wish to print this document, we recommend exporting it to a PDF and printing the PDF.
- You may also attach the confirmation to the event details page as a record of what was sent.



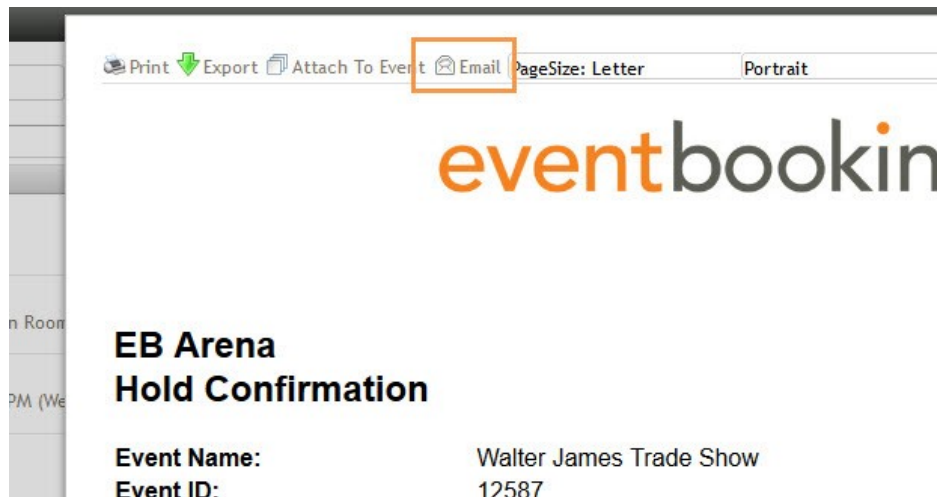
## Export to PDF

To export to a PDF, hover over *Export* and then click *PDF*. In Chrome, a link to your PDF will appear at the bottom of your browser. In Firefox, you'll be prompted in a popup to open or save your PDF.

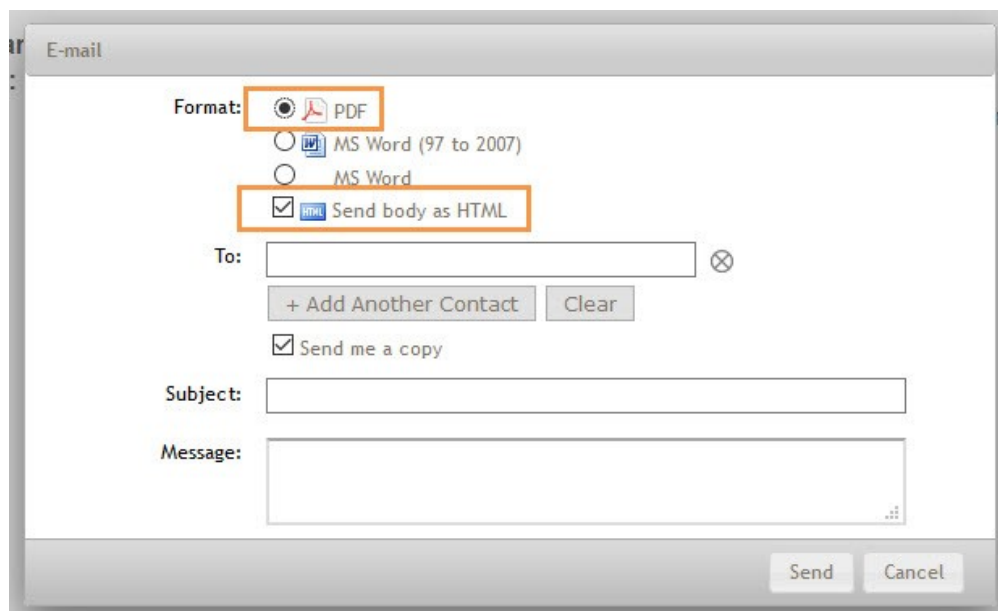


## Emailing your Confirmation

1. click *Email*.

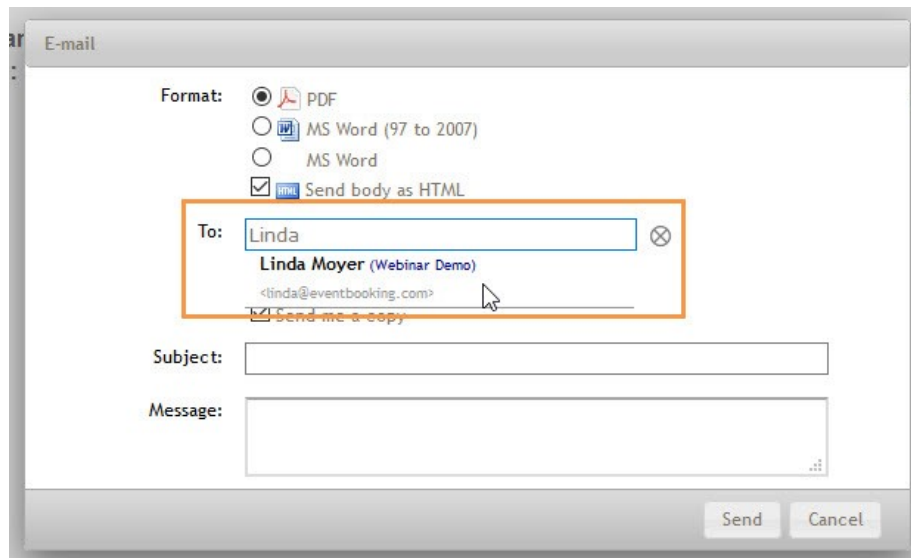


2. In the popup, leave *PDF* selected (we do not recommend sending the confirmation in Word format). In addition to the PDF attachment, you may select *Send body as HTML* to include the information in the document in the body of the email as well.



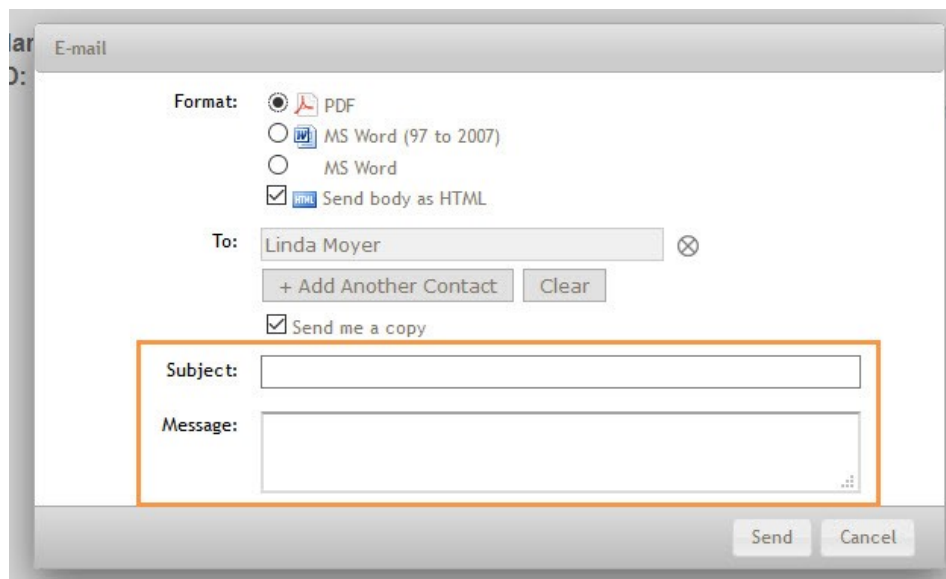
3. In the box by "To" type in the name of your contact to find them in the Address Book. Click on their name to select.

*We do recommend that if your contact is not in the address book, you add them rather than typing in their email address. The email header will then include their name, rather than stating "unknown".*



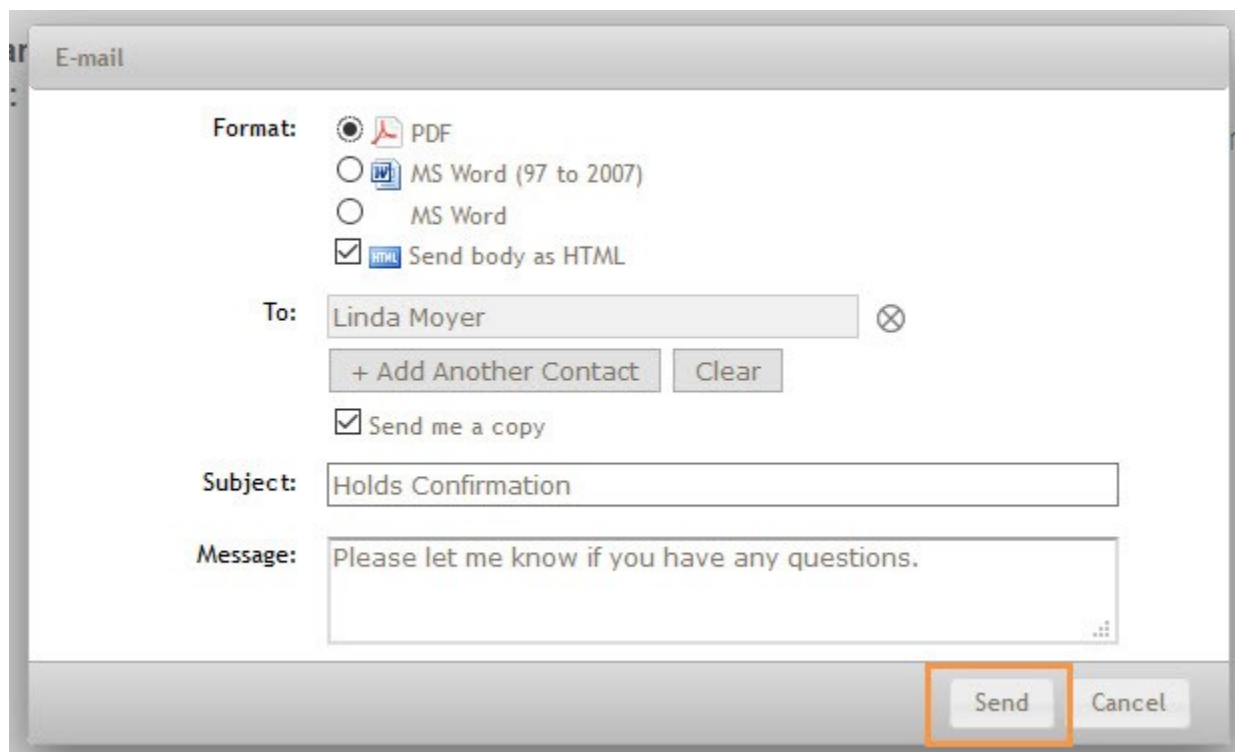
The screenshot shows the 'E-mail' dialog box. The 'Format' section has three radio buttons: 'PDF' (selected), 'MS Word (97 to 2007)', and 'MS Word'. There is a checkbox for 'Send body as HTML' which is checked. The 'To' field contains the text 'Linda'. A dropdown menu is open below the 'To' field, showing 'Linda Moyer (Webinar Demo)' with the email address '<linda@eventbooking.com>'. Below the dropdown is a checkbox for 'Send me a copy' which is checked. The 'Subject' and 'Message' fields are empty. At the bottom right are 'Send' and 'Cancel' buttons.

4. Add the Subject of your email and any message that you wish to include in the body of the email. If you have selected *Send body as HTML* your message will appear above the confirmation information.



The screenshot shows the 'E-mail' dialog box. The 'Format' section has three radio buttons: 'PDF' (selected), 'MS Word (97 to 2007)', and 'MS Word'. There is a checkbox for 'Send body as HTML' which is checked. The 'To' field contains the text 'Linda Moyer'. Below the 'To' field are two buttons: '+ Add Another Contact' and 'Clear'. Below these buttons is a checkbox for 'Send me a copy' which is checked. The 'Subject' and 'Message' fields are highlighted with an orange border. At the bottom right are 'Send' and 'Cancel' buttons.

5. Click *Send*. Your message will go into the queue to be sent shortly.



The image shows a screenshot of an "E-mail" dialog box. The "Format" section has four options: "PDF" (selected with a radio button), "MS Word (97 to 2007)" (unselected), "MS Word" (unselected), and "Send body as HTML" (checked with a checkbox). The "To:" field contains the name "Linda Moyer" and has a close button (X) to its right. Below the "To:" field are two buttons: "+ Add Another Contact" and "Clear". There is also a checkbox labeled "Send me a copy" which is checked. The "Subject:" field contains the text "Holds Confirmation". The "Message:" field contains the text "Please let me know if you have any questions." At the bottom right of the dialog box, there are two buttons: "Send" and "Cancel". The "Send" button is highlighted with an orange rectangular border.

**E-mail**

**Format:**

- ☒ PDF
- ☐ MS Word (97 to 2007)
- ☐ MS Word
- ☒ Send body as HTML

**To:** Linda Moyer ⓧ

+ Add Another Contact Clear

☒ Send me a copy

**Subject:** Holds Confirmation

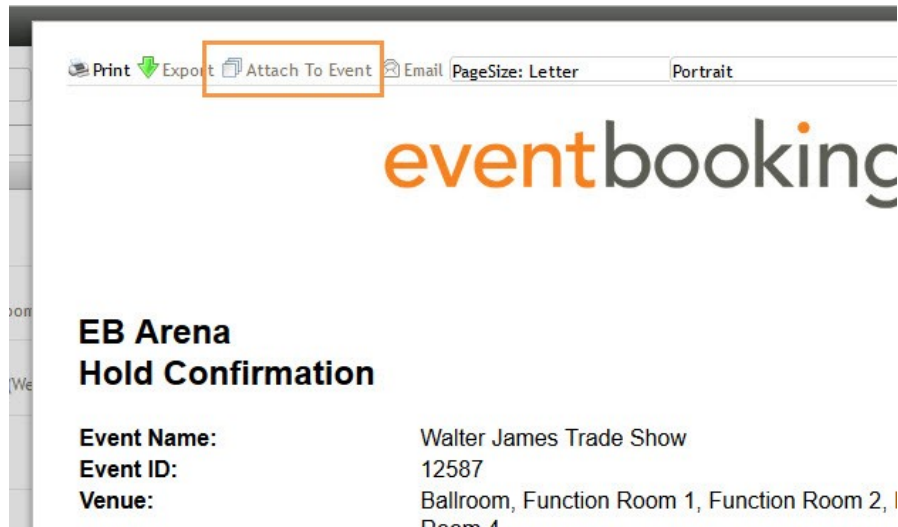
**Message:** Please let me know if you have any questions.

Send Cancel

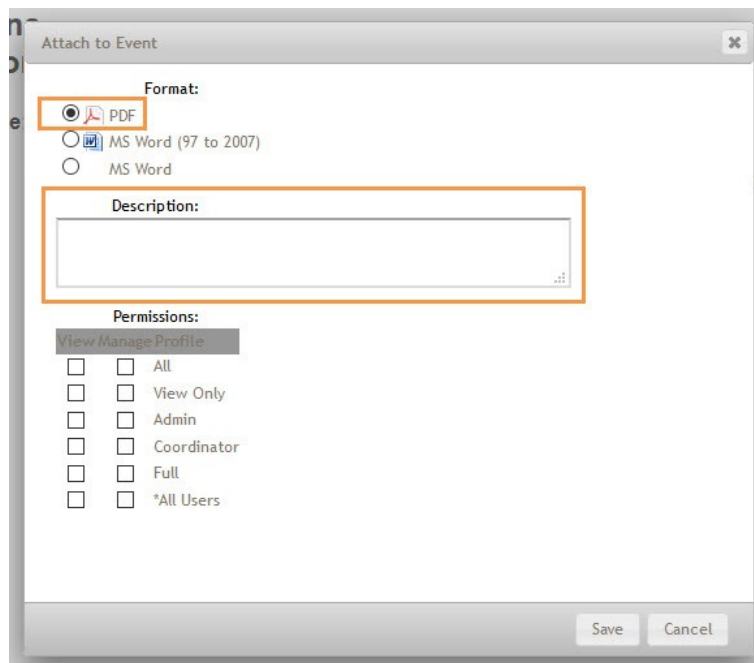


## Attaching the Confirmation to your Event Details Page

1. Click *Attach to Event*.



2. In the popup, leave *PDF* selected. Add a description if you wish (such as date sent, who you sent it to, etc).



3. Choose who should be able to view the confirmation. If you do not select any users or permission levels, the confirmation will be private to you.

Attach to Event

**Format:**

☒ PDF

☐ MS Word (97 to 2007)

☐ MS Word

**Description:**

Sent 10/6 to Linda.

**Permissions:**

View Manage Profile

<input type="checkbox"/>	<input type="checkbox"/>	All
<input type="checkbox"/>	<input type="checkbox"/>	View Only
<input type="checkbox"/>	<input type="checkbox"/>	Admin
<input type="checkbox"/>	<input type="checkbox"/>	Coordinator
<input type="checkbox"/>	<input type="checkbox"/>	Full
<input type="checkbox"/>	<input type="checkbox"/>	*All Users

Save Cancel

4. Click Save.

Attach to Event

**Format:**

☒ PDF

☐ MS Word (97 to 2007)

☐ MS Word

**Description:**

Sent 10/6 to Linda.

**Permissions:**

View Manage Profile

<input type="checkbox"/>	<input type="checkbox"/>	All
<input type="checkbox"/>	<input type="checkbox"/>	View Only
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Admin
<input type="checkbox"/>	<input type="checkbox"/>	Coordinator
<input type="checkbox"/>	<input type="checkbox"/>	Full
<input checked="" type="checkbox"/>	<input type="checkbox"/>	*All Users

Save Cancel

5. Your confirmation will be saved to the documents tab on the event's details page.

ssBook Resources Invoicing Reports (Help Desk) (Sign out) Linda M

Search

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**Walter James Trade Show : Event (Id=12587)** Actions Event Search

Account Number: **tra**  
Finance Status: **n/a**  
Tax Exempt: **n/a**

**Granted Hold 1**

**Type**  
Consumer

**Avails Display**  
Show only the color (no text)

**Grouping**  
Could not locate parent

**Contacts** [+Add](#)  
**Walter James**  
Voice: 8655551212  
Mailing: 123 Main  
Knoxville, TN 37900  
Main: [support@eventbooking.com](mailto:support@eventbooking.com)

**Event Manager**  
**Sarah Jane**

**Production Coordinator**  
Not Set

**Description**  
Not Set

Functions/Spaces Timeline Activities/Journals Notes **Documents** Resources History Publicity Contract Details Flash Report

[+Add document from library](#) [+Upload and add document](#)

Document	Attached	Rev	Revised By
<a href="#">Invoice_id206_num51_rev0_dt20160616_141947</a> Estimated space rental	6/16/2016 10:19 AM by Group A	1	
<a href="#">Walter_James_Tra_12587_Hold_Confirmatio_2016-10-06_12_12_22_855_u181</a> Sent 10/6 to Linda.	10/6/2016 12:12 PM by Linda Moyer	1	Linda Moyer