

Comprehensive review of SOCIAL TABLES
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Home Screen

EVENT NAME	EVENT DATE ↓	CREATOR	LAST ACTIVITY
Wedding	8/17/19	Arzoo Zaheer	Today
Gala	8/23/19 – 9/30/19	Arzoo Zaheer	Today
Tea Party	8/23/19 – 9/30/19	Arzoo Zaheer	Today

Home screen

On the *Home* screen, the grey left-hand vertical menu shows four options: **Events**, **Storage**, **Sales** and **Settings**.

The Social Tables logo  appears on top of the left-hand vertical menu. Clicking on this button brings you back to the **Events** section—this is very helpful when the diagramming tool is open.

The top-right corner of the *Home* screen shows four options:

- **Find a Venue**
- **Upgrade Account**
- **Help** drop-down menu that contains options *Help Center*, *Training* and *Home Overview Tutorial*
- A drop-down menu that shows options *Account Settings* and *Log Out*

Find a Venue

event |  socialtables

AZ Arzoo

Find floorplans & diagram events

Search by location or venue

Event Size ▲ Search

Attendees

Guest Rooms

Explore all venues

Featured Locations

Los Angeles Washington DC London San Francisco New York City

Find floorplans & diagram events page

The *Find floorplans & diagram events* page opens when **Find a Venue** option is clicked. The *Search* bar lets you search by location or venue; you can modify your search by adding number of *Attendees* and *Guest Rooms* in the **Event Size** drop-down menu.

Just below this bar is the **Explore all venues** option. Clicking on this takes you to advanced search where you can search venues by using additional parameters like *Attendees*, *Largest Rooms (ft²)*, *Meeting Rooms* and *Amenities*.

Events

Clicking on **Events**, opens the **Events** section which shows *Upcoming Events*, *Past Events* and *All Events* tabs. You can create events and browse through new, past, or all events.

EVENT NAME	EVENT DATE	CREATOR	LAST ACTIVITY
Gala	8/23/19 - 9/30/19	Arzoo Zaheer	8/15/19
Tea Party	8/23/19 - 9/30/19	Arzoo Zaheer	8/15/19

Events section

On the top-right corner, there is a *Sort by* drop down menu. This menu displays several methods of sorting the events list including *Event Date*, *Recently Viewed*, *Last Activity*, *Event Name* and *Creator*. Three vertical dots that appear in the last column of each listed item allow you to edit, delete, duplicate, or open an event.

The users mostly work inside the *Upcoming Events* tab. The *Past Events* tab and *All Events* tab just list all the past events and all events respectively; you can sort, edit, delete, or duplicate the items of these lists as well.

The *Search* bar lets you sort data by using the options available under the **Filter** menu; this menu lets you sort information by several parameters including *Event Date*, *Last Activity* and *Event Type*.

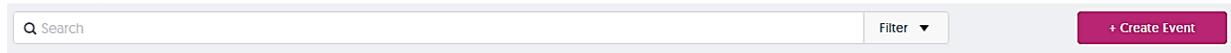
EVENT NAME	EVENT DATE
Wedding	8/17/19
Gala	8/23/19 - 9/30/19
Tea Party	8/23/19 - 9/30/19

Filter menu of Events section

The space that is right below the *Search* bar shows lists that belong to tabs that are currently open. You will see a list of upcoming events if the *Upcoming Events* tab is open; you will also see a list of past events if the *Past Events* tab is open.

Upcoming Events

Creating an Event

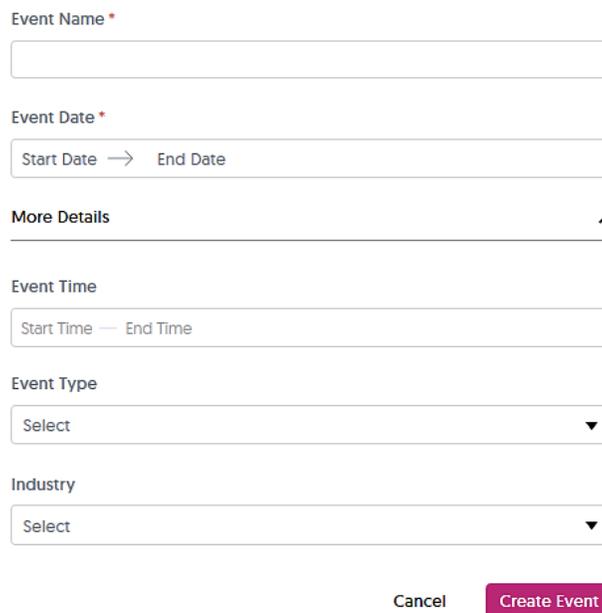


A horizontal navigation bar with a search input field on the left containing the text 'Search', a 'Filter' dropdown menu in the center, and a purple '+ Create Event' button on the right.

+Create Event button

Right across the *Search* bar and the **Filter** menu is the **+Create Event** button. Clicking on **+Create Event** opens the *Create Event* dialogue box. Here, you can enter *Event Name*, *Event Date*, *Event Time*, *Event Type* and *Industry*.

Create Event



The 'Create Event' dialogue box contains the following fields:

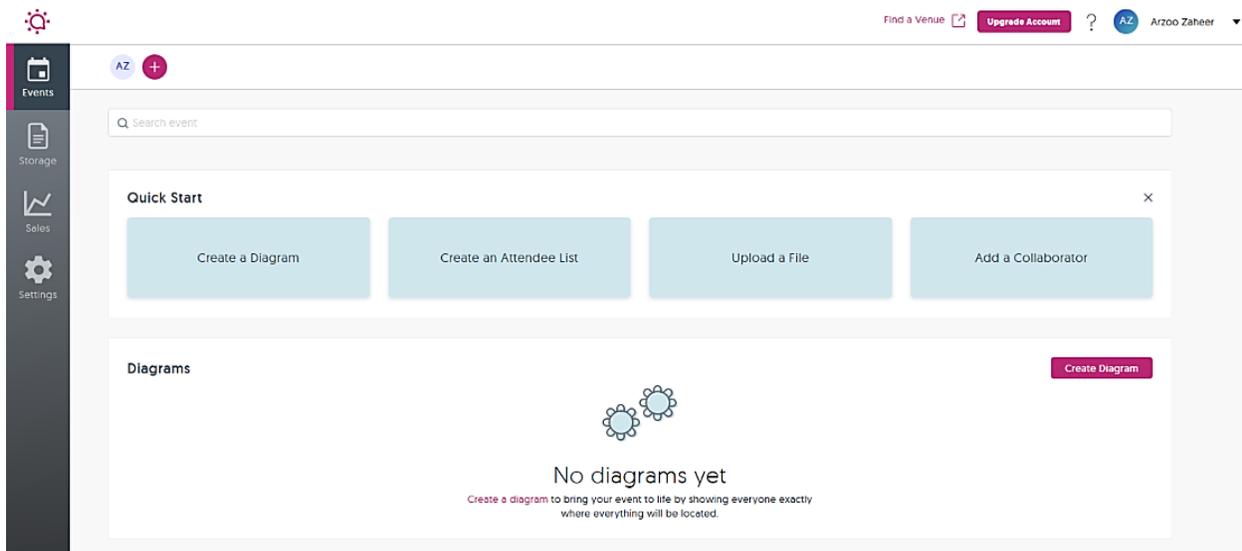
- Event Name ***: A text input field.
- Event Date ***: A date range selector with 'Start Date' and 'End Date' fields and a right-pointing arrow between them.
- More Details**: A section header with an upward-pointing arrow.
- Event Time**: A time range selector with 'Start Time' and 'End Time' fields and a horizontal line between them.
- Event Type**: A dropdown menu with 'Select' as the current value.
- Industry**: A dropdown menu with 'Select' as the current value.

At the bottom right, there are two buttons: a 'Cancel' button and a purple 'Create Event' button.

Create Event dialogue box

After the event is created, it is listed under *Upcoming Events*. It is possible to edit, duplicate or delete an event by clicking on the three vertically aligned dots that appear next to the *Last Activity* column of the list.

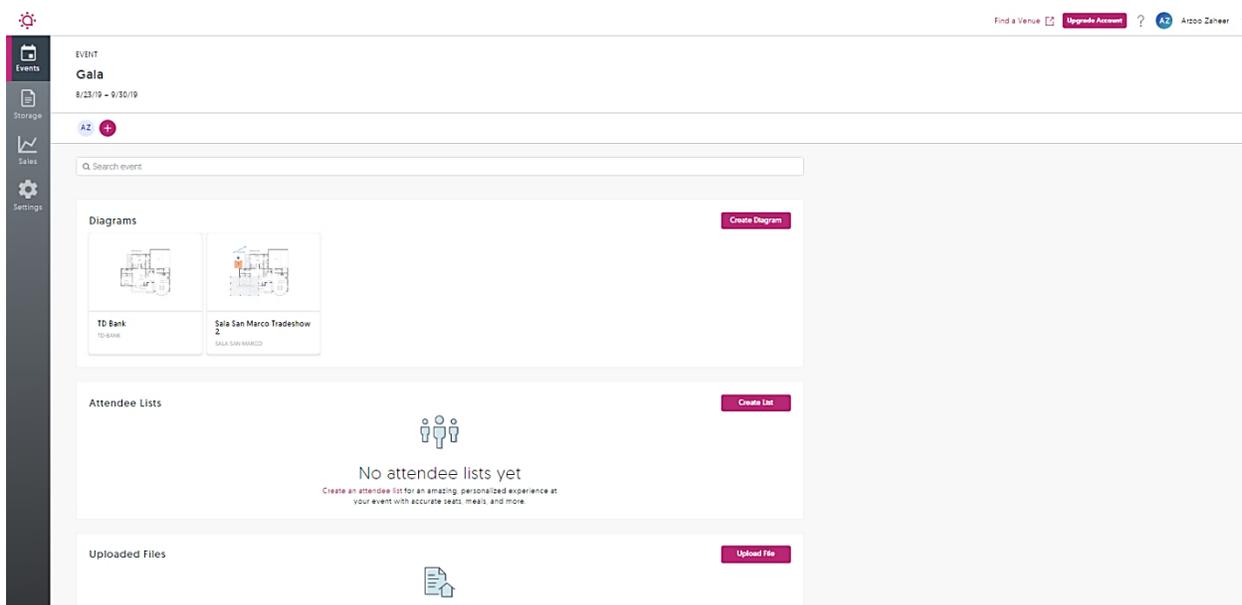
Once an event is created, it is opened in the window. This new screen is identical to the one that opens when we click on an event in a list; the only thing missing from the later is the *Quick Start* menu.



Quick Start menu

The *Quick Start* menu offers four options: **Create a Diagram**, **Create an Attendee List**, **Upload a File** and **Add a Collaborator**. The first three options are seen again below.

Below the *Quick Start* menu and when an event is opened from the list, you can see three panes: *Diagrams*, *Attendee Lists* and *Uploaded Files*.



Opened Event

Creating Diagrams

Clicking on **Create a Diagram** from the *Quick Start* menu or **Create Diagram** from the *Diagrams* pane opens the *Create Diagram* dialogue box. Now you can upload a floorplan that is saved in Social Tables by

clicking on **Select from Library** button or select one from your computer by clicking on **Upload Floorplan**.

Create Diagram

Event Space *

Select From Library

Upload Floorplan

Skip event space selection and use blank floorplan

Diagram Name *

Enter a name for this diagram

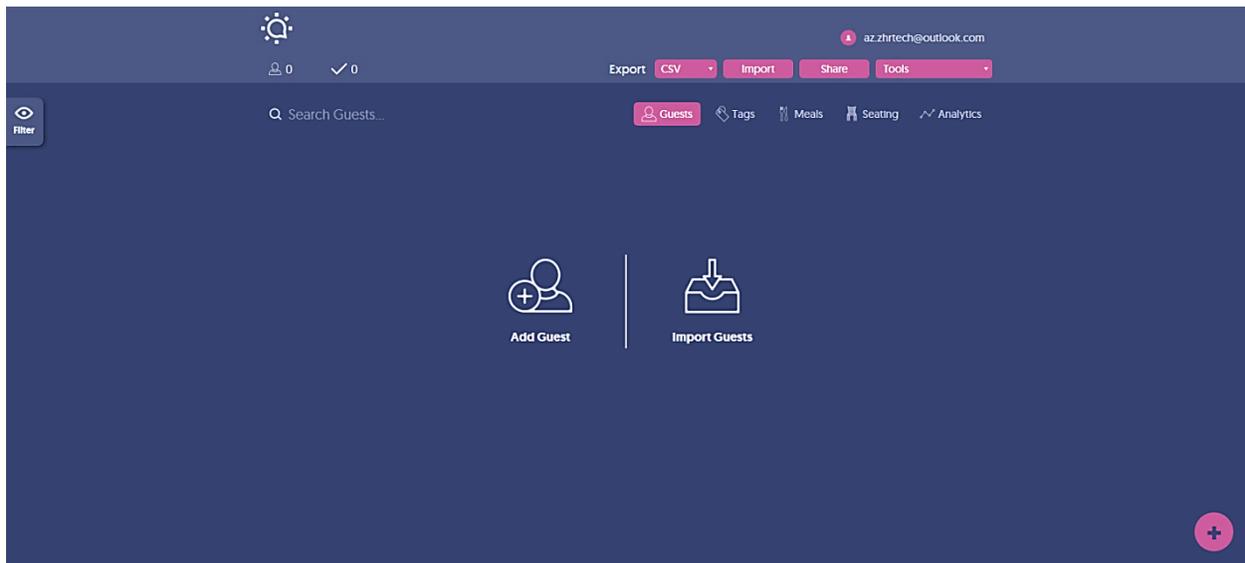
Cancel

Create

Create Diagram dialogue box

Creating Attendee Lists

Clicking on **Create an Attendee List** from the *Quick Start* menu or **Create List** from the *Attendee List* pane opens the *Create attendee list* dialogue box. Enter the name of the list and then click on **Create** to open the *Guest List* screen.

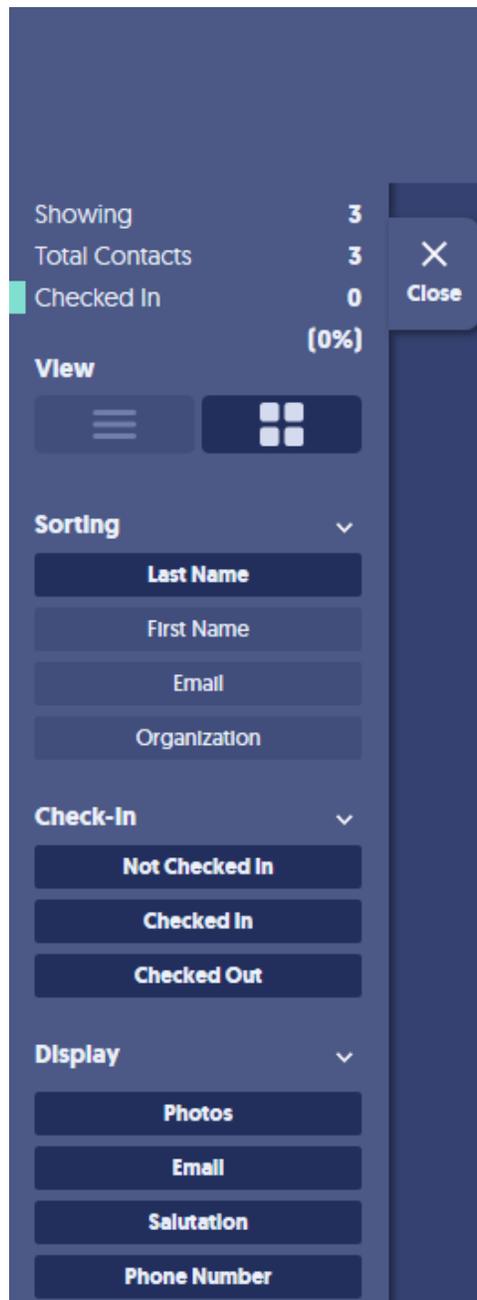


Guest List screen

Guests can be added by using options provided under the *Guests* tab. Clicking on **Import Guests** opens the *Import Guests* dialogue box where you may upload a CSV or XLSX file or connect with Eventbrite or Salesforce. Clicking on **Add Guest** opens the *New Guest* dialogue box where you may manually enter the

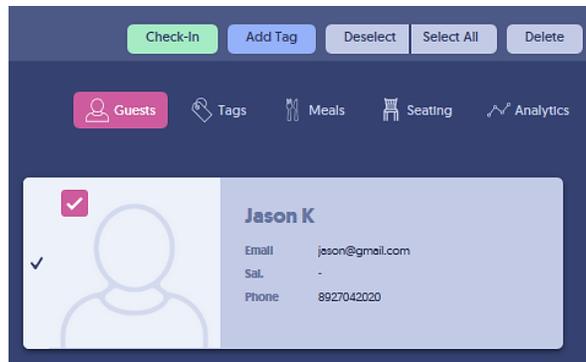
guests' information including *Name*, *Contact Email* and *Contact Phone Number*. The  sign opens the *New Guest* dialogue box after a guest has been manually added or a guest list has been uploaded. Now you can add any remaining guests by using the  sign.

You can search for guests by using the *Search* bar; or filter the list by using the **Filter** button. The **Filter** button lets you view items in rows or as thumbnails; sort lists; show guests who are *Checked In*, *Checked Out*, or *Not Checked In*; and display maximum of four options, such as *Name* and *Email Address*, on the thumbnails.



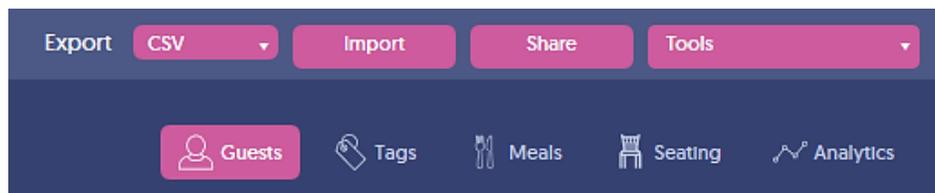
Filter button expands to show some options

You can edit guest details by clicking on the **Edit** button that displays on the top-right as you hover over a thumbnail. After a thumbnail is selected, options like *Check-In* and *Add Tag* become available in the top menu.



The top menu changes once a thumbnail is selected.

The *Guest List* screen has two primary menus. The top menu offers options like **Export, Import, Share and Tools**. The menu that is right below this menu displays items like **Guests, Tags, Meals, Seating and Analytics**.



Two primary menus of the *Guest List* screen

Export: Export guest lists as CSV, XLSX, PDF, Badges, or Table Summary; and choose which fields to display

Import: Upload guest lists as CSV and XLSX or connect with Eventbrite or Salesforce

Share: Share emails and add permissions like *Edit, View Only or Seating Guests*

Tools: Send QR codes or notifications to guests

Guests: Add or edit guests lists

Tags: Assign tags to guests by using the diagramming tool or  sign

Meals: Assign meals to guests by using the **Create a meal** button or  sign

Seating: Assign Seating by using the diagramming tool

Analytics: View Analytics for Check-Ins

Uploading Files

Clicking on **Upload a File** from the *Quick Start* menu or **Upload File** from the *Uploaded Files* pane allows you to choose a file from your computer and upload it. You can share all sorts of documents including contracts, timelines, images and marketing collateral.

Adding Collaborators

Clicking on **Add a Collaborator** from *Quick Start* menu opens the *Share Event* dialogue box where you may add the email addresses of the collaborators and change permission settings.

Can View	
<input checked="" type="radio"/> Event Details + View All	Access, view and upload files to, and comment in Event Details. View objects on a diagram and attendee lists.
<input type="radio"/> View All	View objects on a diagram and attendees.
<input type="radio"/> Diagram Objects	View objects on a diagram.

Can Edit	
<input type="radio"/> Event Details + Edit All	Access, view and upload files to, and comment in Event Details. Edit diagrams + attendees, and add collaborators.
<input type="radio"/> Full Edit Access	Edit diagrams and attendees, check-in, and seat attendees.
<input type="radio"/> Diagram Objects	Edit existing objects on a diagram.
<input type="radio"/> Check-In Attendees	Check-in attendees.
<input type="radio"/> Seat Attendees	Seat attendees on a diagram.

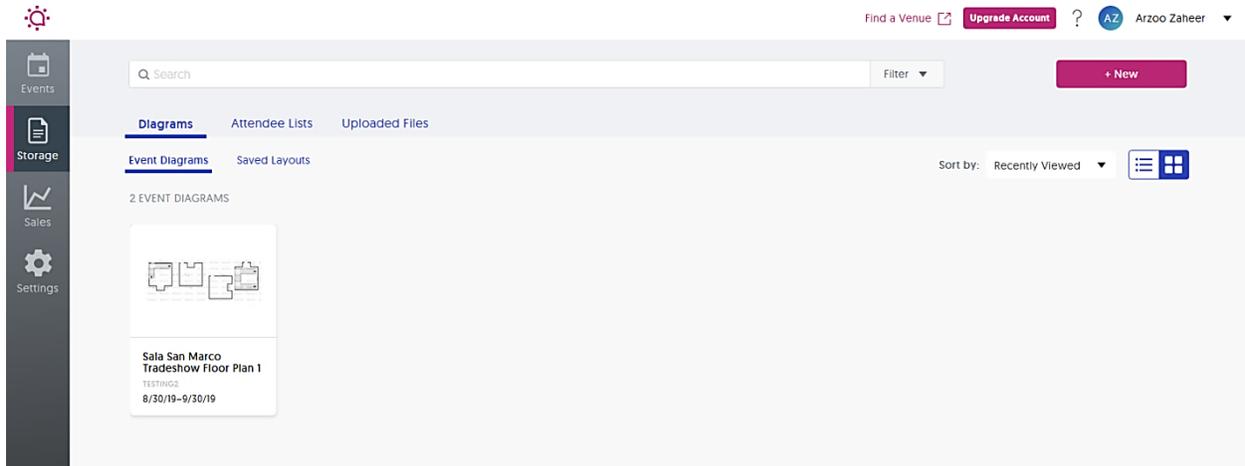
Save

Select Permissions dialogue box

The *Select Permissions* dialogue box opens when you click on **Select Permissions** button of the *Share Event* dialogue box. You can change viewing options such as *View All* and *Diagram Objects*; or modify editing options such as *Diagram Objects* and *Full Edit Access*.

Storage

The **Storage** section has three tabs namely *Diagrams*, *Attendee Lists* and *Uploaded Files*.



Storage section

The *Search* bar lets you sort data by using the options available under the **Filter** menu; this menu is different for each tab.

Click on the **+New** button to create a diagram and attendee list or upload a file.

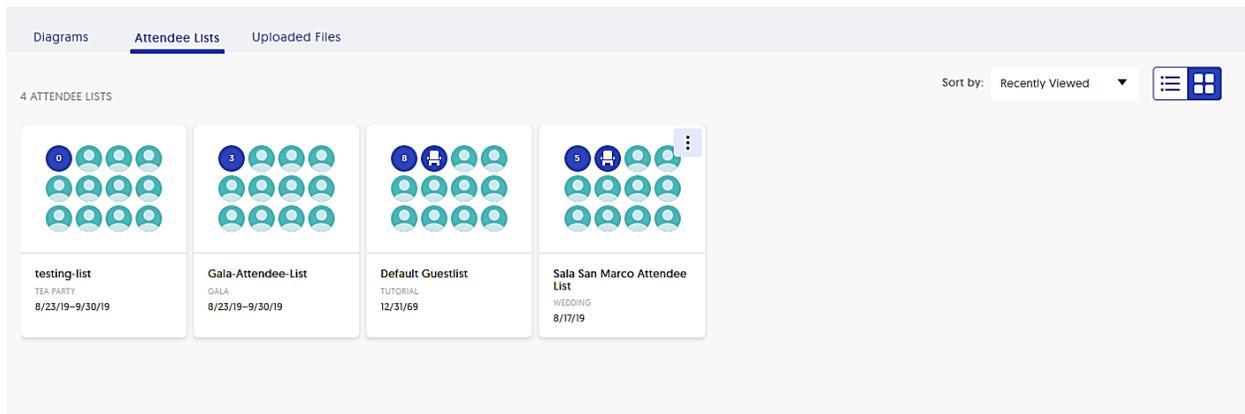
On the top-right corner, there is a *Sort by* drop down menu. This menu displays several methods of sorting the diagrams, attendee lists and uploaded files including *Event Name*, *File Name* and *Creator*.

Right next to the *Sort by* menu are the viewing options. You can view diagrams, attendee lists and uploaded files as lists or thumbnails.

NAME	EVENT SPACE	CHAIR COUNT	EVENT NAME	EVENT DATE	CREATOR	LAST ACTIVITY
✓ Sala San Marco Tradeshow 2	Sala San Marco Trades...	10	Gala	8/23/19 – 9/30/19	Arzoo Zaheer	Today
✓	blank space	0	Tutorial	12/31/69	Arzoo Zaheer	
✓ Sala San Marco Tradeshow 1	Sala San Marco Trades...	10	Tea Party	8/23/19 – 9/30/19	Arzoo Zaheer	8/15/19
✓ Centurion 1	Centurion 1	24	Wedding	8/17/19	Arzoo Zaheer	8/15/19
✓ Centurion 2	Centurion 2	0	Wedding	8/17/19	Arzoo Zaheer	8/15/19
✓ Sala San Marco	Sala San Marco	0	Tea Party	8/23/19 – 9/30/19	Arzoo Zaheer	
✓ TD Bank	TD Bank	0	Gala	8/23/19 – 9/30/19	Arzoo Zaheer	8/15/19
✓	blank space	0	Tutorial	12/31/69	Arzoo Zaheer	

List View

When items are being viewed as lists, three vertical dots that appear in the last column of each listed item allow you to edit, delete, duplicate or open an item.



Thumbnail View

When an item is viewed as a thumbnail, then you need to hover over the thumbnail to display three vertical dots, which allow you to edit, delete, duplicate or open an item.

Diagrams

The Diagram tab has two sections namely **Event Diagrams** and **Saved Layouts**.

Event Diagrams

Creating Diagrams

Clicking on the **+New** button, which is next to the *Search* bar, opens a drop down menu from which you can select **Diagram**; or you can just click on the **Create Diagram** button that appears below the menu when this section is empty. This opens the *Create Diagram* dialogue box. Now you can upload a floorplan that is saved in Social Tables by clicking on **Select from Library** button or select one from your computer by clicking on **Upload Floorplan**.

Create Diagram

What event is this for? *

Event Space *

Skip event space selection and use blank floorplan

Diagram Name *

Cancel

Create

Create Diagram dialogue box

In order to be able to use the Social Tables library, you must have uploaded some images as diagrams; used the diagramming tools to add objects to your floorplan and then saved that image as a layout.

You can also assign an event name and diagram name through this dialogue box.

Filtering Diagrams

The **Filter** menu lets you filter diagrams by using options like *Event Space*, *Event Type* and *Diagram Chair Count*.

Filter menu of **Event Diagrams** section

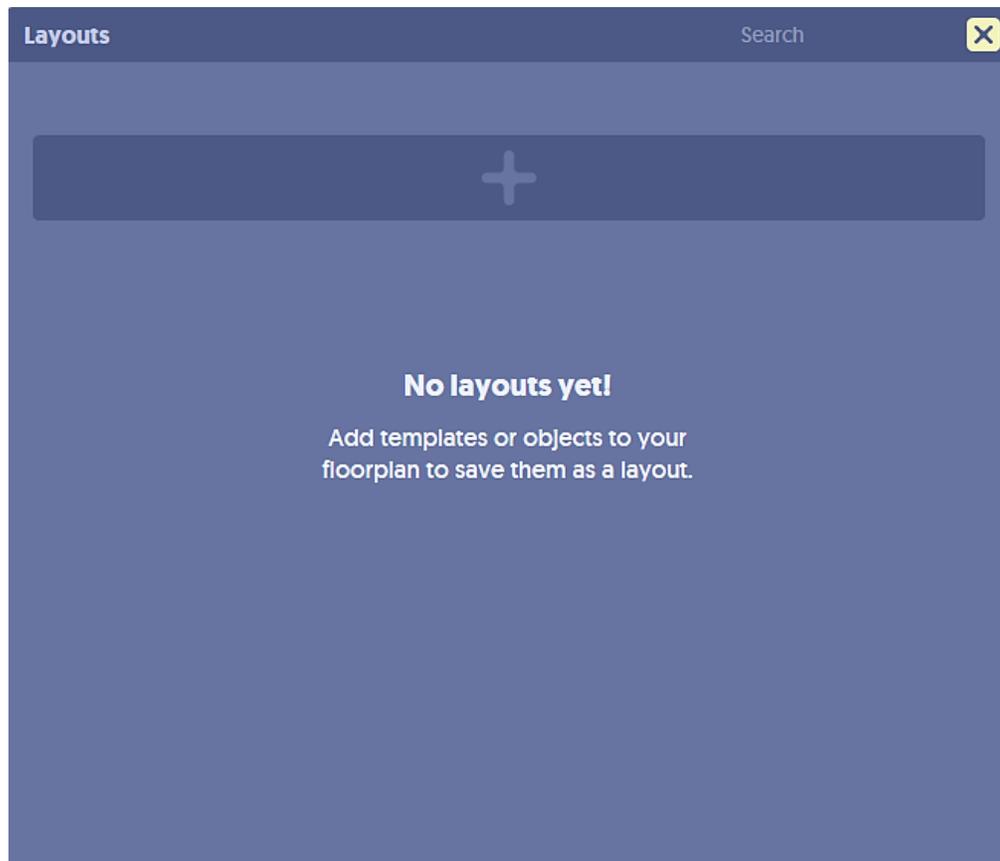
Saved Layouts

The layout is a saved setup or maximum capacity that a given property frequently uses; layouts can be used to create new diagrams for events.

Creating and Using Layouts

Create Diagram button of Saved Layouts section

When the **Saved Layouts** section is empty, you can create a layout by clicking on **Create Diagram**. Now you can upload a floorplan that is saved in Social Tables by clicking on **Select from Library** button or select one from your computer by clicking on **Upload Floorplan**. As soon as a diagram has been created, the diagramming tool opens. Now you can save the diagram as a layout; to save a diagram as a layout, at least one object should have been added to the diagram with the help of the diagramming tool. Now click on **File** and then select **Save Layout**; this opens the *Layouts* dialogue box.



Layouts dialogue box

Click on the  sign to open the *Save New Layout* dialogue box; give this layout a name and save it.

Once a layout has been created, it shows in the **Saved Layout** section. You can create a diagram by hovering the mouse over a thumbnail and clicking on the three vertical dots to select **Create Diagram**.

Create Diagram from Layout

What event is this for? *

Enter event name

Diagram Name *

Sala San Marco Tradeshow Default-Layout

Cancel

Create

Create Diagram from Layout dialogue box

You can now assign this layout a specific event from your event list and add a name. Once created, this layout will now be displayed in the **Event Diagrams** section of the **Storage** section or under the *Diagrams* pane of the **Events** section. You can access layouts through the **Saved Layouts** section or by selecting **Settings** and then *Event Space Library*.

Diagramming Tool

The diagramming tool can be accessed by opening a saved diagram or layout or it opens on its own as soon as a diagram is created.

Sharing Comments

Sharing comments is a critical part of editing diagrams. You can add collaborators by clicking on the **Share** button that is located right next to the event name. The *Share Event* dialogue box lets you add and manage collaborators; change Permission settings to allow collaborators to view or edit files, diagrams, events and attendees and restrict access by selecting a specific date and time.

Share Event

Restrict Access On

09/12/2019 1:00 AM/PM

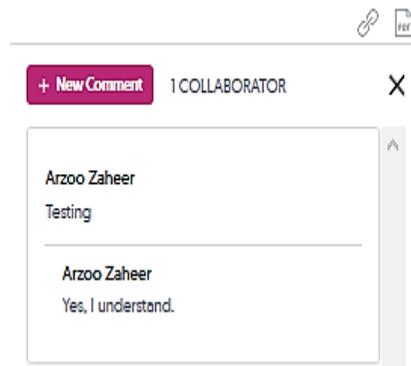
Add Collaborator ^

Add Email Select Permission... Share

Manage Collaborators · 1 v

Share Event dialogue box

To begin commenting, click on the bubbles located towards the upper-right hand side of your diagram. You can add a comment and all the collaborators will receive an email notification. You can reply to a comment and edit or delete a comment.



Comments pane

Top Bar

The top bar has three sections: **Main menu**, **Diagram Name** and **Viewing Options**.

The top menu has several options.



Top Menu of Diagramming Tool

File: Select from several items including *Version History*, *Diagram Settings*, *Collaborator Settings* and *Save Layout*.

Edit: Use editing options like *Cut*, *Copy* and *Paste*.

Tools: Access several tools including *Selector*; *Setup Templates* such as *Theatre* or *Conference*; *Single Objects* like *Trade Show* or *Entertainment*; *Favourites* including *My Favourites* or *Team Favourites*; *Table Numbering* and *Attendees*.

Arrange: Select arrangement options like *Rotate Floorplan*; *Group Objects*; *Lock* and *Align Items*.

View: Choose viewing options such as *Zoom In*; *Floorplan View Options*; *Attendee View Options* and *Gridlines*.

The **Diagram Name** section is in the centre of the top menu bar. This is where the name of diagram appears. Clicking on this opens the *Settings* dialogue box which lets you edit settings for *Event*, *Room* and *Favourites*.

The **Viewing Options**, *Public Diagram Link* or *PDF*, are available on the very right of this top bar. *Public Diagram Link* can be turned off to allow only team members to view the diagrams and turned on to

allow anyone who gets the diagram link to view the diagram. Clicking on *PDF* exports the diagram to make it available for viewing or downloading.

Left Toolbar

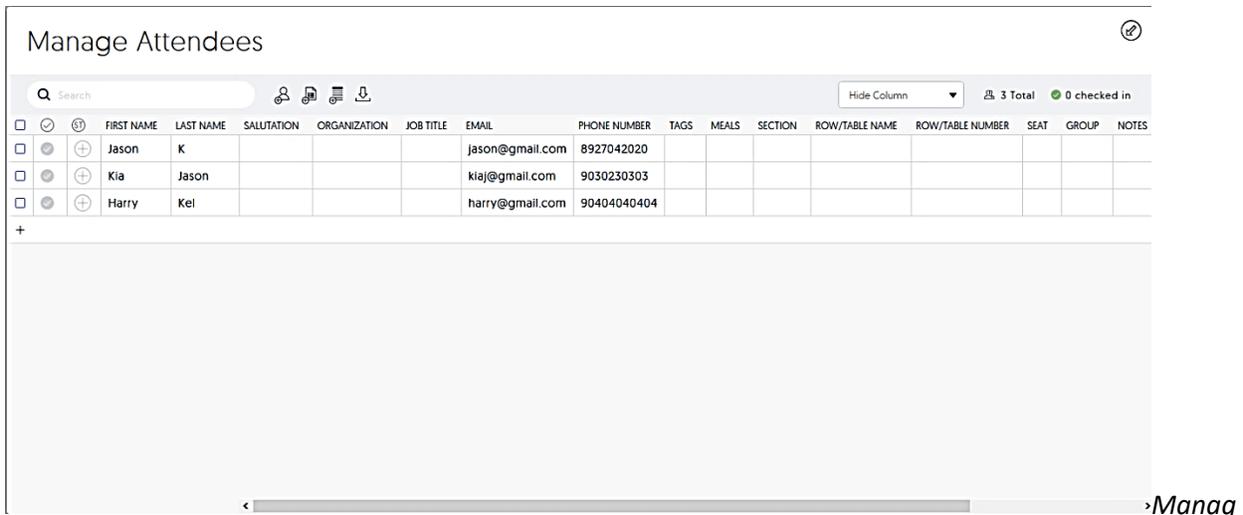
Left Toolbar is made up of a grey toolbar and a *Focus Panel* that contains further commands for each selection found in the grey toolbar.



Left Toolbar

All the options that are available under the **Tools** menu populate on the left toolbar. This toolbar has two additional buttons, **Attendee Management** and **Diagrams**. **Attendee Management** is displayed below **Attendees** and the **Diagrams** button is located at the very end of this toolbar.

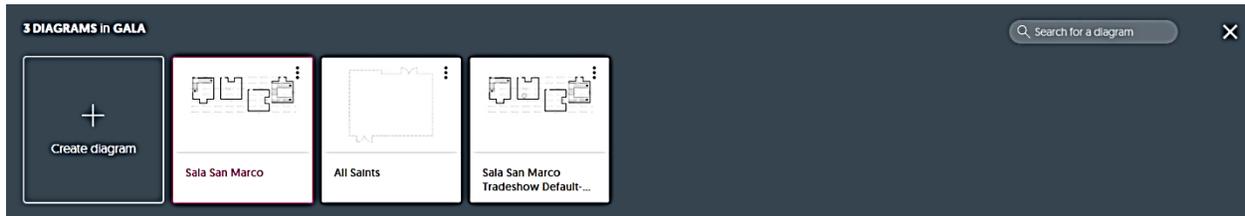
Clicking on **Attendee Management** opens up the *Manage Attendees* dialogue box. You can see the *Manage Attendees* dialogue box provided you have opened the attendee list by clicking on **Attendees** option.



Manage Attendees dialogue box

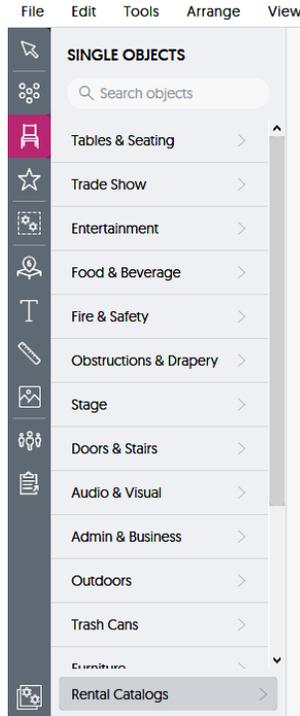
Manage Attendees dialogue box lets you add and check-in attendees, import or export the attendee list, use color to show that an attendee is seated, hide, sort, add or delete data and assign *Autoseat* or *Group* seating to an attendee.

Clicking the **Diagrams** button opens the *Diagrams in Event* dialogue box at the bottom that shows all the diagrams that belong to the event whose diagram is currently open.



Diagrams in Event dialogue box of **Diagrams**

The *Focus Panel* opens when an item on the toolbar is selected. The *Focus Panel* shows sub-items for each button such as *Staggered* or *Aligned Templates* and *Stage* and *Outdoors Single Objects*.



Focus Panel showing sub-items for **Single Objects**

Bottom Toolbars

At the bottom right hand side, there are two toolbars. The one to the left shows basic options like *Selector*, *Pan*, *Zoom In* and *Redo* functions. The toolbar that is on the right side is referred to as the *Equipment List*.



Bottom bars: Basic functions are shown in the right toolbar; *Equipment List* is the left toolbar

As you expand the *Equipment List*, you can see the details of equipment including object sizes and quantities. Clicking on an item found in the *Equipment List* (show below) highlights it on the floorplan.

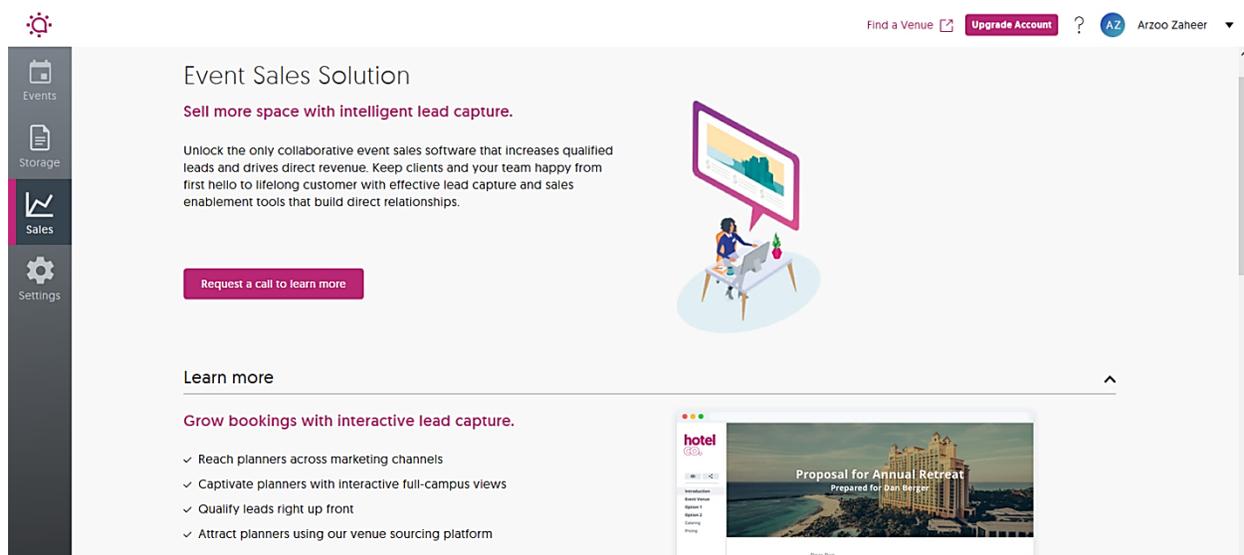
EQUIPMENT		
	72' Round	2
	8' Serpentine	1
	16 x 16' Banquet	1
	1.3' X 4' Bench	1
	20' X 30' Tent	1
	2' X 3.3' Podium	1
	8' X 6' Riser	1

Sales

Social Tables has two different versions:

- FOR PLANNER is for corporate or independent planners and caterers. (FOR PLANNERS URL: <https://www.socialtables.com/pricing/>)
- FOR PROPERTIES is for professional hotels, venues and universities (FOR PROPERTIES URL: <https://www.socialtables.com/pricing/properties/>)

The **Sales** feature is locked in the FOR PLANNER Social Tables, it opens once the FOR PROPERTIES Social Tables is purchased.

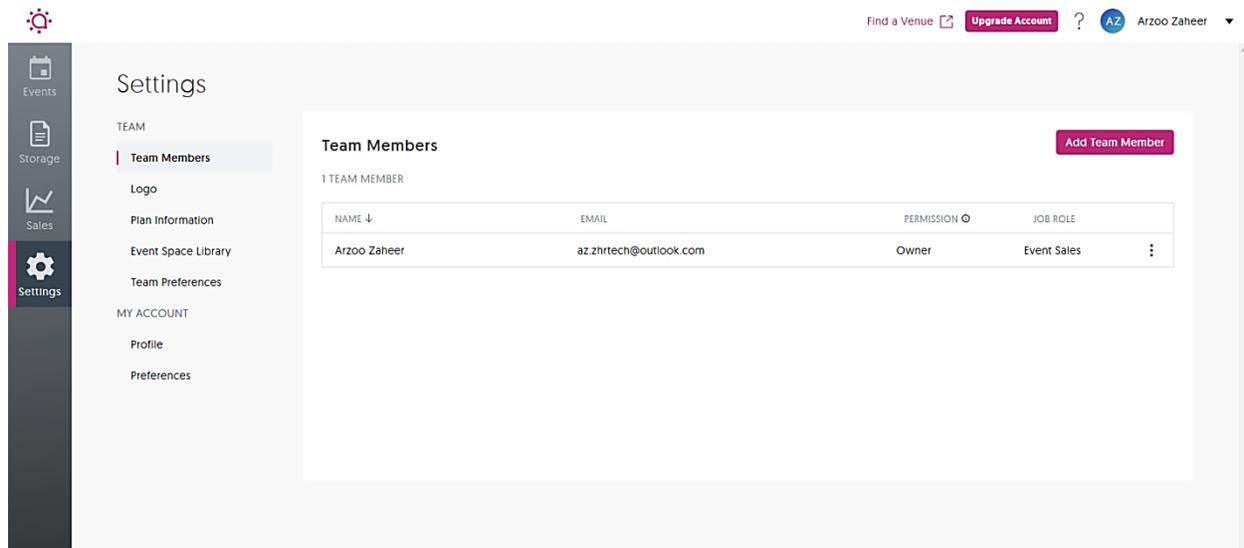


Sales section

Generating event sales is a complex process, which changes as consumer demands change. Nowadays, event sales are dramatically influenced by consumer needs for personalized interactions, experiential learning and networking.

The **Sales** section offers interactive lead capture including methods of connecting with marketing channels and qualifying leads; intelligent lead management including lead intake, faster sales cycle, automatic scoring and optimal use of space as well as real-time insight including photo-rich responses and real-time documentation and analytics. The most interesting aspect of the **Sales** feature is an interactive, full-campus view of the meeting space that can be either embedded in the website or shared directly with new or existing clients.

Settings



Settings section

There are two types of settings: **Team** and **My Account**

Team

Team section offers the following options:

Team Members: Add a new team member by clicking on **Add Team Member** or change permissions given that you have purchased an upgrade; edit job roles; and, view a list of available members

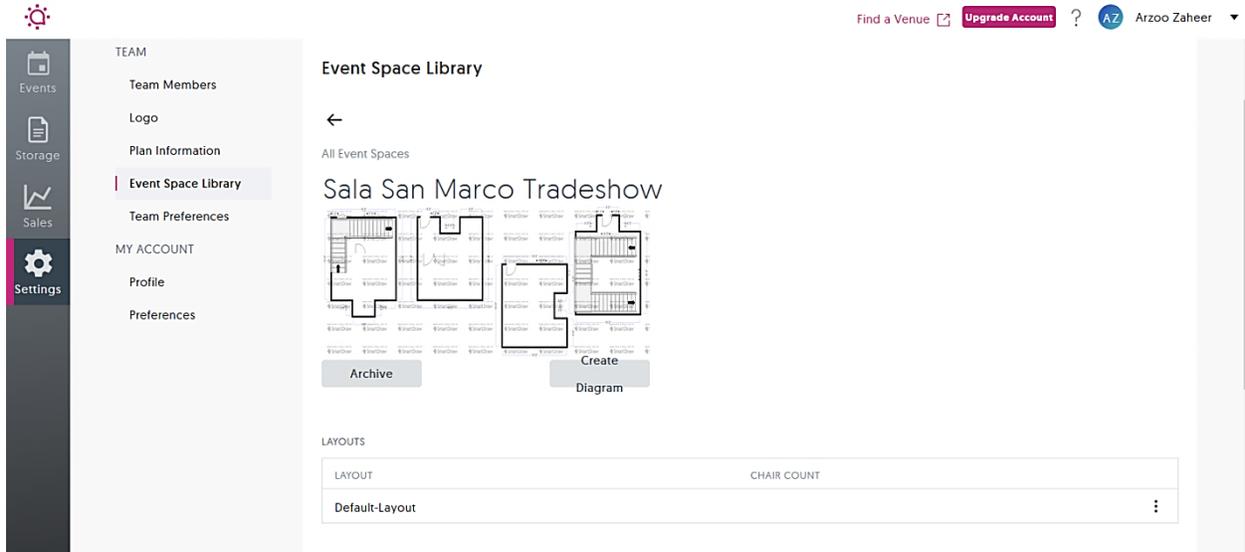
Logo: Add PNG and JPG logo files

Plan Information: Update billing info; upgrade existing membership plan; and view the current plan, plan details and monthly cost

Team Preferences: Select Imperial or Metric unit of measurements for diagrams

Event Space Library: View or manage your team's event space by using available list; search for location or event space; open an event to archive a layout or convert a layout into a diagram; view archived data; and create new event space.

Clicking on an item from the **Event Space Library** opens the *Event Space Library screen*. Here you can archive existing diagrams; create diagrams from layouts and assign these to existing or new events; and rename or delete existing layouts as well as view the *Chair Count*.



Event Space Library

My Account

My Account section offers the following options:

Profile: Add or edit profile data such as title and new password

Preferences: Change the default area that you will see after logging in by selecting *Events*, *Storage* or *Settings* options