TOTAL PARTY PLANNER™

Building Your First Event

Web Based Solution

A step by step guide

We recommend having a worksheet for an upcoming event in front of you now. Use it as a reference to setup one of ***YOUR*** events. This document will walk through setting up that event, including printing the Proposal of Service, Invoice, and Event Worksheet (just a sample of the many different report options).

For best results, follow this guide step-by-step. Total Party Planner has **numerous** features not described in this paper. This document is only meant to serve as a condensed guide to get started. Although concise, it is *very* detailed. As you're working through Steps #1-7, know that it all comes together in Step #8 – *Setting up the Event*. The data entry of Steps #1-7 only needs to be done **ONCE**. When you add contacts, venues, menu items, inventory etc., they will be available for any future event - you will not need to add them again. Events will be built in no time at all! Upon first login, you may be prompted to use the Wizard to get started. As there are many features the Wizard does not cover, this document takes you through setting up your business information and building an event without the Wizard.

Let's get started!!

Step 1 : Edit Business Information, Taxes, and Defaults

Entering Your Business Information

- From the upper right hand corner menu bar, select **Administration | Business** > **General Information**.
- The **Main** tab is active. Click the **Edit** button located at the lower left hand corner.
- Update the information in the common fields (name, address, phones, etc.) for your business specific data. Helpful Hint: Use the Tab key to navigate from field to field.
- Click the **Save** button.

Taxing & Rules

- From the upper right hand corner menu bar, select **Administration** | **Business**>**Taxing Rules**.
- The **Tax Value & Names** tab is active. Click the **New Tax Location** button.
- Type in a **Tax Location Name** you would like to identify your tax with (typically this would be a county or locality name).
- Type in the appropriate tax rate for **Tax 1**. If you have more than 1 tax rate to charge items to, enter those values for **Tax 2** and **Tax 3**.
- Leave the default **Start Date**. This date should always be sometime in the PAST to accommodate any earlier event bookings you may want to enter.
- Click the **Save** button. The entered data is displayed.
- Click the **Tax Rules** tab.
- Simply stated, your events will follow the taxation rules listed in the grid. For example, by default your food (menu) will tax at the rate setup under Tax 1. Other tax rules apply to beverages, rentals, staff, and service charges. Click the **Edit** hyperlink.
- Leave the default **Effective Date**. This date should always be sometime in the PAST to accommodate any earlier event bookings you may want to enter.
- Update the appropriate tax rates from each drop-down list for menu, beverage, rentals, staff, and service charge. Canadian users will further define the SECOND tax options. Click the **Save** button.
- Optionally setup multiple **Tax Locations**, if your tax changes depending on where your events are taking place.

Business Profile & Default Values

- From the upper right hand corner menu bar, select **Administration** | **Business**>**Profile and Preferences**.

- The **Event Defaults** tab allows you to pre-populate common event items. This serves to save data entry time for NEW events. Click the **Edit** button located at the lower left hand corner of the screen to modify any of the default values. Click the **Save** button to save your changes.
- Click the **Report Preferences** tab. The **label** fields listed allow you to optionally change the terminology your contacts will see displayed on the Proposal & Invoice. Update to any other terms preferred by your business. Click the **Edit** button located at the lower left hand corner of the screen to modify the default values. Click the **Save** button to save your changes.
- The **Application Preferences** tab allows you to setup additional default values for the application itself, having to do with tax rules, time zone, and interfaces with outside programs.

Step 2 : Add a Contact

Who is Hiring You?

- From the main toolbar select the **Contact | Add New Contact** option.
- Enter the appropriate Contact information (name, company, city, state, phone numbers, email, etc.) in the text boxes. Leave the Company field blank if it does not apply to the Contact.
- Click the **Save** button.
- To search for existing contacts, use the **Contact | Full Search** option on the main toolbar.

Step 3 : Add the Event Venue

Where is the event taking place?

- Select the **Venue | Add New Venue** option on the main toolbar.
- Follow **either** the 'Off Premise' or 'On Premise' options below, depending on your need.

Option #1 - Off Premise

- Enter the appropriate venue information (name, city, state, phone numbers, etc.) in the text boxes. ***Do not** check the **On Premise?** checkbox*.
- Optionally, assign a **Tax Location** (as setup in Step 1) to the venue. Then, when you add this venue to an event, the assigned Tax Location will default automatically.
- Click the **Save** button.

  Link Area(s) Setup – this is an **OPTIONAL** section for off premise Venues. Link areas are different locations for the *same* off premise Venue. Ex: (1st Floor, West Wing, Pediatric Ward). Skip to Step #4 if you do not have any Areas associated to the Venue.

  - Click the **Link Areas** tab.
  - Click the **New Area** button.
  - Type in the name of your 1st Area. Optionally, you may also enter a short note, contact charges, tax information, etc.
  - Click the **Save** button. The Area is now visible in the grid. Repeat for other Areas.

Option #2 - On Premise

- Enter your facility information (name, city, state, phone number, etc.) in the text boxes. *Be sure to check the **On Premise?** checkbox*.
- Optionally, assign a **Tax Location** (as setup in Step 1) to the venue. Then, when you add this venue to an event, the assigned Tax Location will default automatically.
- Click the **Save** button

  Room(s) Setup:

  - Click the **Linked Areas** tab.
  - Click the **New Room** button.

  - Type in the name of your 1st banquet room. Optionally, you may also enter a short note, contact charges, tax information, etc..
  - Click the **Save** button. Repeat for other banquet rooms in your facility.

- To search for existing venues, use the **Venue | Full Search** option from the main toolbar.

Step 4 : Add Event Menu Items

What food items are you serving?

- Click the **Menu Items | Add New menu Item** option from the main toolbar.
- Enter the name of the menu item in the **Name** field.
- Select an appropriate category from the **Item Category** dropdown list. Use the **Quick Add Item Category** button to add any new items to the list. Note: This list is fully customizable later to match your business requirements.
- Optionally enter a **Description** of the menu item. Be as detailed as possible. This is what your Contact will see on the Proposal of Service report. Make it mouth-watering!
- If this menu item will ever be sold itemized/ala-carte then enter a **Sale Price** per unit, otherwise leave the value $0.00.
- Click the **Save** button. Repeat the above steps for all the menu items required for the event. Do not add any additional cost items such as rentals, delivery, staff, etc. in this section of the application. They will get added in a later step.
- To search for existing menu items, use the **Menu Items | Full Search** option on the main toolbar.

Step 5 : Adding Inventory

Beverages and rentals for sale.

If the event you are building involves *itemized* beverages or rentals, follow the steps below to add Inventory items to the database now. Event beverages are added with a classification of **Beverage** and event rentals are added with a classification of **Equipment**.

- Select the **Inventory | Add New Inventory Item** option from the main toolbar.
- Enter the item name in the **Item Name** field.
- Select either Beverage or Equipment from the **Classification** dropdown list.
- Select a **Category** from the drop-down list. Use the **Quick Add Item Category** button to add any new items to the list. Note: This list is fully customizable later to match your business requirements.

  Purchase Detail - how do you **order** this item.

  - Enter the purchase amount and unit in the '**Purchase Amt/Measure** field. Ex: "1 Case"
  - Enter the **Purchase Cost** for the purchase detail entered above.
  - Leave the default **Start Date** or enter an effective date for this item's pricing. This date should always be sometime in the PAST to accommodate any earlier event bookings you may want to enter
  - Optionally, select the **Vendor** for this item from the drop-down list.

  Shelving Detail - how you would **shelf/store** this item (or perhaps use it in a recipe).

  - Enter the shelf amount and unit in the **Shelf Amt/Measure** field. How does the purchase detail break down? Ex: "24 Cans". The total purchase unit amount and measurement MUST EQUAL the total shelving unit amount and measurement. In our example above we setup: 1 Case = 12 Cans
  - If this item is to be sold as a beverage or rental, enter the **Sale Price** to the contact.

- Apply the appropriate tax, service charge, and gratuity rules for this item.

- Click the **Save** button. Repeat for all the beverages and/or rentals required for the event.
- To search for existing inventory, use the **Inventory** | **Full Search** option from the main toolbar. Be sure to select the desired classification (Food, Beverage, Equipment, Other).

Step 6 : Adding Staff Titles

Who's working the event?

For purposes of the getting started guide, we will only look at managing staff titles themselves (waitstaff, bartender, etc). Ultimately you will also manage the personnel assigned to those titles.

- Select the **Staff |Titles & Wages** option from the main toolbar.
- Click the **Add New Title** button.
- Enter **Job Title**, **Hourly Wage** (what you pay per hour), **Contact Rate**, (what you charge per hour), and **Start Date** for this particular wage. The start date should always be sometime in the PAST to accommodate any earlier event bookings you may want to enter.
- Click the **Save** button. Repeat for any other titles your event requires.

Step 7 : Adding Miscellaneous Charges

Enter everything else for sale!

Miscellaneous Costs are charges to the Contact that do not fall under the listing of Menu Item, Beverage, Rental, or Staffing. Examples may include items such as delivery, DJ, florals, etc.

- Select the **Misc. | Add New Misc. Item** option from the main toolbar.
- Enter the **Item Name**
- Select a **Category** from the drop-down list. This list is fully customizable later to match your business requirements.
- Select a **Type** from the dropdown list. Miscellaneous Costs are divided into four sale categories : Flat Rate, Per Person, Each, and Per Hour.
- Apply the appropriate tax, service charge, and gratuity rules for this item.
- Enter the **Actual Cost** which is *your* internal cost.
- Enter the **Sale Price** which is the charge to the contact.
- Leave the default **Effective Date**. Be sure this date is always sometime in the PAST to accommodate any earlier bookings you may want to enter.
- Click the **Save** button. Repeat to add any other Miscellaneous items required for the event.
- To search for existing miscellaneous items, use the **Misc. | Full Search** option on the main toolbar.

Step 8 : Setup the Event

Pulling it all together!

Main Booking Tab

- Select **Event | Add New Event** from the main toolbar.
- In the **Contact Detail** section, click the **Assign** button. From the pop-up window, search for the contact added in Step #2. Click the **Select** hyperlink in the grid.
- Select a **Date** using the dropdown control.
- Select an **Occasion** and **Service Style** from the drop-down list. Use the **Quick Add… button** options to add any new items to the list. Note: This list is fully customizable later to match your business requirements.
- Change the event **Status** in the dropdown list if necessary.
- Enter the **Guest Count**
- To select a **Venue**, click the **Assign** button. From the pop-up window, search for the venue added in Step #3. Click the '**Select'** hyperlink in the grid.
- Optionally, enter the event start and end times. A full timeline of event details can be added in a later step.

- Select the tax from the **Tax Location** dropdown list that was setup in Step #1. If the contact is tax exempt, check the **Tax Exempt** checkbox.
- Optionally, enter service charge, gratuity, payment terms, net due days, and deposit detail. The invoice number generated for a new event is the next sequential invoice number available in the database. You may edit this number, however, duplicate invoice numbers are not allowed.
- Click the **Save** button. The event **view** window is displayed.

  Optionally assign Rooms/Areas

  - Click the **Add/Remove Areas** button to further define the banquet room(s)/areas setup in Step #3.
  - Select the appropriate rooms/areas by checking column 1 in the grid. Click the **Assign Selected** button. Click the **Back to Event** button when complete.

Timeline Tab

- Click on the **Timeline** tab of the event view screen. If either the event start or end times were entered in the booking detail, they will appear in the grid.
- Click the **Update Times** button.
- Times can be selected from the **Time Name** dropdown list. Use the **Quick Add New Value** button to add any new items to the list. Note: This list is fully customizable later to match your business requirements.
- Assign the T**ime** value for the selected time. Optionally enter any contact notes (for the Proposal of Service report) or kitchen notes (for the Event Worksheet/BEO report).
- Click the **Back to Event** button.

Notes Tab (all fields are optional)

- Click the **Notes** tab of the event view screen.
- To edit any of the notes, click the **Edit Notes** button.
- Proposal notes are broken down into the Top and Bottom Section. You may want to use the top notes as a greeting, and the bottom notes to get more specific about terms, etc.
- Enter generic **Event Notes** and **Setup Notes**. These notes print to various kitchen and event management reports – but mainly they are used for the Event Worksheet/BEO report.
- Be sure to click the **Save** button for each tab where notes are entered!
- Click the **Back to Event** View button.

Event Menu Tab

- Click the **Menu #1** tab of the event view.

The first thing to decide when building a menu is the type of costing for that event. There are 2 costing models built into the database, **Per Serving Pricing** and **Itemized Pricing**.

Per serving pricing takes the number of servings you specify and multiplies by the designated cost per serving. For example 50 Servings @ $10/Serving = $500.00 on the invoice.

Itemized pricing calculates event menu items prices individually. For example, 2 Hot Italian Subs at $5.00/each and 1 Relish Tray at $15.00/each, would have an invoice price of $25.00. Pricing is independent of guests and servings.

- Click the **Edit Price and Name Info** hyperlink.
- Select a **Menu Pricing** Option.

For Per Serving Pricing:

- Enter the total number of **Servings** (currently defaulted to the event guest count).
- Enter the **Price Per Serving**.

- Override the default service charge and taxing rules if required. Optionally enter any contact notes (for the Proposal of Service report) or kitchen notes (for the Event Worksheet/BEO report).
- Click the **Save** button.
- Click the **Add to/Update Menu** hyperlink.
- Search for one of the menu items added in Step #4 on the **Available Menu Items** tab. Filter the selection list by changing the **Category** or type in the first few characters of a specific item in the search box. Be sure to click the **Search** button to apply the filter.
- Check the box in the first column of the grid to select an item. For per serving pricing, the **Ala-Carte?** Can be clicked to itemize/charge this item separately on the invoice from the per serving price. I.e., they are *additions* to the Per Serving Price.
- Click the **Add to Event Menu** button. If a Menu Item you require does not exist in the list, use the '**Quick Add Menu Item** button. Refer to Step #4 for full details on adding a new menu item. Repeat the above steps to add other Menu Items.
- Click the **Back to Event** button.

Editing an Event Menu Item Row

  - To change any of the item details (quantity, notes, etc.), click the **Edit** hyperlink of the desired menu item. Make data changes and click the **Save** button.

Beverages & Rentals Tab

- Beverage Add: Click on the **Beverages** tab of the event view. Click the **Add to/Update Beverages** hyperlink.
- Rental Add: Click on the '**Rentals**' tab of the event view. Click the **Add to/Update Rentals** hyperlink.
- Find one of the Items added in Step #5 in the **Available … Items in Database** tab. Filter the selection list by changing the **Category** or type in the first few characters of a specific item in the search box. Be sure to click the **Search** button to apply the filter.
- Select the item to be added to the event by checking the box in the first column of the grid.
- Enter the event amount in the second column.
- Double check your default service charge, gratuity, and tax rules. They can be (along with the sale price) be overridden for the event.
- Click the **Add to Event** button. Repeat to add all required Beverages or Rental items. If an Inventory item you need does not exist in the list, click the **Quick Add New …** button. Refer to Step #5 for full details on adding a new Inventory Item.
- Click the '**Back to Event'** button.

Editing an Event Beverage or Rental Row

  - To change any of the item details (quantity, notes, etc.), click the **Edit** hyperlink of the desired item. Make data changes and click the **Save** button.

Miscellaneous Tab

- Click the **Misc.** tab of the event module.
- Click the **Add to/Update Misc** hyperlink.
- Find one of the Items added in Step #7 in the **Available Misc Items in Database** tab. Filter the selection list by changing the **Category** or type in the first few characters of a specific item in the search box. Be sure to click the **Search** button to apply the filter.
- Select the Miscellaneous item to be added to the event by checking the box in the first column of the grid.
- Enter the **Event Amt** in the second column. If applicable; enter the **Hours** depending on the miscellaneous type
- Click the **Add to Event** button. Repeat for all miscellaneous items required for the event.

Editing an Event Miscellaneous Row

- To change any of the item details (quantity, notes, etc.), click the **Edit** hyperlink of the desired item. Make data changes and click the **Save** button.

Staff Tab

- Click the **Hire Staff** tab of the event module.
- Click the **Add to/Update Event Staff** hyperlink.
- Choose a **Staff Title** from the dropdown list. These are the titles added in Step # 6. Once a title is selected, the **Contact Rate** and **Pay Rate** will default to the setup values for that title.
- Optionally, enter an arrival and departure time. If the data is entered the system will automatically calculate the **Pay Hours**.
- Enter the **Billed Hours**. They can be the same, or different, than the pay hours.
- If you require more than 1 of the selected titles (i.e., 3 bartenders), enter the total **Quantity**.
- If this title should be invoiced to the contact, then ensure the **Invoice Contact?** box is checked – otherwise uncheck it now.
- Click the **Hire Title or Staff Member** button.

Editing an Event Staff Row

- To change any of the item details (times, rate, pay, quantity, etc.), click the **Edit** hyperlink of the desired item. Make data changes and click the **Save** button.

Step 9 : Reporting & Emailing

You are sure to find a report for every facet of the business! Take some time to review the entire list.

- Select **Reports | All** from the main toolbar. NOTE: If the pop-up blocker (top of screen) prompts a warning when trying to preview a report, select **Always Allow Pop-ups from This Site**.

  Proposal Report
  - From the list, click the **Select** hyperlink for the **Proposal of Service** report in the Contact category.

  Invoice Report
  - From the list, click the **Select** hyperlink for the **Invoice Event** report in the Contact category.

  Event Worksheet Report
  - From the list, click the **Select** hyperlink for the **Event Worksheet** report in the Event Preparation category.
- In the filter box at the top, be sure the **Last Selected Event** option is selected.
- Check/uncheck desired print options.
- Click the **Show Report** button.

Emailing a Report

Any report can be emailed from the Adobe preview window. You must be in preview mode to email. The report will be created as a PDF attachment to your email.

- Click the **Show Report** button of any report.
- In the upper left hand corner of the Adobe preview window, enter a **Filename** for the .pdf attachment. Do not enter the .pdf extension – only the main part of the name.
- Click the **Email Report** button.
- Enter the appropriate From, To, Subject, and Body details for the email.
- Click the **Send** button.

Congratulations!! Your first event is complete. Please feel free to call our offices at (804) 550-0505 with any questions you may have regarding Total Party Planner. We will be glad to assist you.