TOTAL PARTY PLANNER™

Catering Software Made Simple

Building Your First Event

Desktop Version 10.0

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).

Notes:

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 your working through Steps #1-6, know that it all comes together in Step #7 – *Setting up the Event*. The data entry of Steps #1-6 only needs to be done **ONCE**. When you add clients, venues, menu items, inventory etc., they will be available for any future Event - you will not need to add them again. Eventually building Events will involve only Step #7. Events will be built in no time at all!

The document refers to this as the **Main Tool Bar**:

Let's get started!!

Step 1 : Edit Business Information and Taxes

From the Menu Bar, select **Business**> **Business Information & Taxes**.

Main Tab

- Click the **Edit** button located at the lower left hand corner of the screen.
- Update the pre-loaded Sample information in the common fields (name, address, phones, etc.) to *YOUR* business specific data.
- Click the **Save** button.

Tax Values Tab

- Click the **Tax Values** tab.
- From the **Tax Location** dropdown list, select the option **<ADD NEW>**.
- Type in a tax location name you would like to identify your Sales tax with.
- Click the **OK** button. The name will now appear in the tax location dropdown list. Default values of zero are pre-populated in the **Tax Values for Selected Tax Location** grid below.
- Click the **Edit Tax** button.
- Type in the sales tax rate number 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.

Tax Values Tab

- 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. To change any of the individual tax rules click the **Edit Rule** button.
- 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.
- Click the **Save** button.
- Close the **My Business Information** window now by clicking the open door icon on the far right side of the Main Tool Bar.

Step 2 : Add the Event Client

Who is Hiring You?

- Click the **Client** button on the Main Tool Bar.
- Click on the **Add New Client** button.
- Enter the appropriate Client information (name, company, city, state, phone numbers, etc.) in the text boxes. Last Name and/or Company name are the only required fields.
- Click the **Save** button.

Step 3 : Add the Event Venue

Where is the event taking place?

- Click the **Venue** button from the Main Tool Bar.
- Click the **Add New Venue** button.
- Follow **either** the Off Premise or On Premise options below, depending on your need.

Option #1 - Off Premise

- Enter the appropriate Location information (name, city, state, phone numbers, etc.) in the text boxes. *Do not check the **On Premise?** checkbox.*
- Click the **Save** button.

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?** check box.*
- Click the **Save** button.

Room(s) Setup:

- Click the **Facility Rooms** tab.
- Click the **Add Room** button.
- Type in the name of your 1st banquet room. Optionally, you may also enter a short note.
- Click the **Save** button. Repeat as necessary for other banquet rooms in your facility.

Step 4 : Add Event Menu Items

What food items are you serving?

- Click the **Menu Items** button on the Main Tool Bar. The **Menu Items** tab is displayed.
- Click the **Add New Menu Item** button.
- Enter the name of the menu item in the **Display Name** field. Leave **Search Name** blank.
- Select an appropriate **Item Category** from the dropdown list. This list can be updated later to match your business requirements. For now, select one of the pre-loaded items.
- Enter a **Description** of the menu item. Be as detailed as possible. This is what the Client will see on the Proposal of Service report.
- If this product will ever be sold itemized/ala-carte then enter a **Sale Price** per unit, otherwise leave the value $0.00.
- 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. Repeat for all the menu items required for the Event. Do not add any additional cost items such as beverages, rentals, delivery, staff, etc. in this section of the application. They will get added in a later step.

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**.

- Click the **Inventory** button from the Main Tool Bar.
- Click one of the **Beverage** or **Equipment** options in the **Show in Grid…**'frame, depending on the type of inventory (beverage or rental) to be added.
- Click the **Add New Inventory** button.
  Enter the **Item Name** (how you would identify the inventory) and select a **Category** from the dropdown list. The category list can be updated later to match your business requirements. For now, select one of the pre-loaded items.
- A **Description** is optional.
- Apply the appropriate tax information.
- For RENTALS only, indicate whether service charge, and gratuity rules apply for this item.

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

  - Enter the numeric purchase amount in the **Prch Amt** field and measurement portion of the item's purchase unit of measure from the **Prch Meas** dropdown list. Ex: "1 Case(s)"
  - Enter the Cost for the purchase detail defined in the **Prch Cost** field. Ie., how much was the case defined in the last step?
  - Leave the default **Start Date** or enter an effective date for this item's pricing. On initially data entry, be sure this date is always sometime in the PAST to accommodate any earlier event bookings you may want to enter.
  - Optionally, select the **Vendor** from the dropdown list. Use the **<QUICK ADD>** option to add one of your Vendor names.

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

  - Enter the numeric portion of the item's shelf amount in the **Shelf Amt** field and the measurement portion of the item's shelving unit of measure from the **Shelf Meas** field. Ex: "12 Can(s)" The total purchase unit amount and measurement MUST EQUAL the total shelving unit amount and measurement. In our example above we setup: 1 Case(s) = 12 Can(s)
  - If this item is to be sold as a beverage or rental, enter the **Sale Price** to the client.

- Click the **Save** button. Repeat for all the beverages and/or rentals required for the event.

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** from the Main Tool Bar.
- Click the **Staff Job Titles & Wages** tab.
- Click the **New Title** button.

- Enter **Job Title**, **Hrly Wage** (what you pay per hour), **Client 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.

- Click the **Misc.** button from the Main Tool Bar.
- Click the **Add New Miscellaneous** button.
- Enter the miscellaneous items **Name** and select a **Category** from the dropdown list. The category list can be updated later to match your business requirements. For now, select one of the pre-loaded items.
- Select a charge **Type** from the dropdown list. Miscellaneous Costs are divided into four charge categories Flat Rate, Per Person, Each, and Per Hour.
- Select the appropriate **Tax @** for this item (Tax 1, 2, or 3, or non-taxable). The values for these selections were defined in Step #1.
- Apply the appropriate tax, service charge, and gratuity rules for this item.
- Enter the **Actual Cost** (your internal cost).
- Enter the **Client Price** (charge on invoice).
- Leave the default **Start 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 .

Step 8 : Setup the Event

Pulling it all together!

- Click the **Event** button on the Main Tool Bar.
- Click the **Create a New Event** Button.
- Select the Client added in step #2 from the dropdown list. The list can be sorted by Last Name, Company in the **Sort Select List (Below) By** frame.
- Click the ‘**Select This Client** button.

Main Tab

General Detail Frame

- Double click the green **Event Date** text box. Use the calendar to select the Event date. Be sure to click the desired day on the calendar before clicking the **OK** button.
- Change the **Status** in the dropdown list if necessary.
- Enter **Guest Count**, **Occasion**, and **Srv Style**. These are required fields. The occasion and service style lists can be updated later to match your business requirements. For now, select one of the pre-loaded items.

The main tab is further defined into sub-tabs on the right half of the screen.

Venue Sub-Tab

- Click the **Change Venue** button.
- Select the **Venue** for this event from the dropdown list. The selection should be the venue added in Step # 3.
- Click the **Select Location** button.

- Optionally, use the **Assign** button to further define the banquet room(s) in Step #3. Select the appropriate room/area and click the **Assign to Event** button. Repeat for all rooms associated to the Event.
- Click the **Done** button when complete.

Times Sub-Tab

- Optionally, add any relative event times. Although all the times are optional, it is a good idea to always record the Event Start and End Time for purpose of viewing on the Calendar and Room Manager.
- Click the **Add or Remove Times** button.
- Select a **Time Code** (start, load, cleanup, etc) from list. The list values can be updated later to match your business requirements. For now, select one of the pre-loaded items.
- Select a **Time Value** (ex:12:00 PM) from the dropdown list and optionally any notes.
- Click the **Add Time to Event>>** button.
- Click the **Done** button after all required times have been entered.

Invoice Detlai Sub-Tab

- Select the **Tax Location** from the dropdown list. This was entered in Step #1. If the client 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 at the lower right hand corner of the screen.

Notes Tab

- Click the **Notes** tab of the event module. All note fields are optional.
- To edit any of the notes, click the **Edit Note** button near the note.
- Enter any special client notes on the **Proposal** sub-tab**.** 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 any Event generic or setup notes on the **Event Worksheet** sub-tab. These notes are internal only. They print to various kitchen and Event management reports.

Event Menu Tab

- Click the **Menu** tab of the Event module.

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.

- Select either the **Per Serving Pricing** or **Itemized Pricing** option from the dropdown list located at the top middle section of the screen.
- Click the **Build Menu** button below the grid on the left hand side.
- Find one of the menu items added in Step #4 in the grid. Filter the selection list selecting one of the **Category** values or type in the first few characters of a specific item in the **Search** box.
- Enter the **Invoice Qty**. The **Kitchen Qty** defaults to the same unless changed. You may also add notes or change the description.

- 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 Selected Item to Event Menu** button. If a menu item you require does not exist in the list, click the **Quick Add Item** button. Refer to Step #4 for details on adding a new menu item.
- Repeat to add all required event menu items.
- Click the **Done** button.
- Per Serving Pricing only:
  - Click the **Charge Per Serving** button.
  - Enter the total number of **Servings** (this value is already defaulted to the Event guest count) and the **Price Per Serving**.
  - Click the **Save** button.

Editing a Menu Item

  - To change any of the Event menu item details (quantity, notes, etc.), select the particular grid row to update.
  - Click the **Edit** button on the selected row.
  - Make any required changes and click the **Save** button.

Beverages & Rentals Tab

- Beverages Add: Click on the **Beverages** tab of the event module. Click the **Add Beverages to Event** button.
- Rentals Add: Click on the **Rentals** tab of the Event module. Click the **Add Rentals to Event** button.
- Select the Inventory item(s) from the grid that were added in step #5. You can further filter the grid by selecting a particular **Category** or typing a few characters in the **Search** box.
- Enter the total quantity required in the **Event Amt** field.
- Click the **Add Selected to Event** button. If an Inventory item you need does not exist in the list, click the **Quick Add New Inventory** button. Refer to Step #5 for adding a new Inventory Item.
- Repeat to add all required beverage or rental items.
- Click the **Done** button.

Editing a Beverage or Rental Row

  - Select the particular grid row to update.
  - Click the **Edit** button on the selected row.
  - Make required changes and click the **Save** button.

Miscellaneous Tab

- Click the **Misc.** tab of the event module.
- Click the **Add Miscellaneous to Event** button.
- Select a miscellaneous item from the **Available Miscellaneous Items in Database** grid. You can further filter the grid by selecting a particular **Category.**
- If applicable, enter a quantity under **Num Items** and possibly **Hrs/Item** depending on the miscellaneous type.
- Click the **Add Selected Item to Event** button.
- Repeat to add all required miscellaneous items.
- Click the **Done** button.

Editing a Miscellaneous Row

  - Select the particular grid row to update.
  - Click the **Edit** button on the selected row.
  - Make required changes and click the **Save** button.

Staff Tab

- Click the **Hire Staff** tab of the event module.
- Click the **Add Staff to Event** button.
- Choose a **Staff Job Title** from the dropdown list. These are the titles added in Step # 6. Once a title is selected, the **Bill Rate** will automatically populate.
- If you require more than 1 of the selected titles (i.e., 3 bartenders), enter the total **Quantity**.
- Optionally, enter an arrival and departure time in the **Sched Arvl** and **Sched Dprt** fields. If the data is entered the system will automatically show the scheduled hours in a label.
- If this title should be invoiced to the contact, then ensure the **Invoice Contact?** box is checked – otherwise uncheck it now.
- If the title is to be invoiced, enter the **Bill Hours**. They can be the same, or different, than the pay hours.
- Click the **Save** button.

  Editing an Event Staff Row

  - Select the particular grid row to update.
  - Click the **Edit** button on the selected row.
  - Make required changes and click the **Save** button.

Step 8. Reporting & Emailing

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

Previewing Reports

- Click the **Reports** button from the Main Tool Bar.
- Be sure the **Print Destination** option location on the lower left hand corner of the screen is selected as **Window**.

  Invoice Report

  - From the list, select **Invoice Event**.
  - In the frame on the right, check the option **Print My Company**.
  - Check/uncheck other desired print options.
  - Click the **Preview** button. From here the report can be sent to your printer by clicking the printer icon at the top of the page. Close the report window now by clicking the close door icon on the Main Tool Bar.

  Proposal Report

  - From the list, select **Proposal of Service**.
  - In the frame on the right, check the option **Print My Company**.
  - Check/uncheck other desired print options.
  - Click the **Preview** button. From here the report can be sent to the printer by clicking the printer icon at the top of the page. Close the report window now by clicking the door icon on the Main Tool Bar.

  Event Worksheet Report

  - From the list, select **Event Worksheet**.
  - Check/uncheck other desired print options.
  - Click the **Preview** button.

Emailing a Report

- Select a report to email. The report must be opened to the window in preview mode.
- Click the Export icon button on the Preview Window toolbar. **This is the button next to the print icon. It is a picture of an envelope and red arrow pointing down.**

Option #1 : Email through Microsoft Outlook.

- Select option 1
- Enter required email information as you would in Outlook.
- Click the **Send Now** button.

Option #2 : Save as a PDF file (send as an attachment through a third party application).

- Select option 2
- Select **Acrobat Format (PDF)** as the **Format** from the dropdown list.
- Select **Disk File** as the **Destination**.
- Follow the rest of the export wizard to save the file to somewhere on your harddrive or network.

Congratulations!! Your First Event is Complete. Please feel free to call our offices toll free at 1-866-tot-plan (868-7526) with any questions you may have regarding Total Party Planner. We will be glad to assist you.