# Total Party Planner

## Desktop Version 8.1

### Building Your First Event

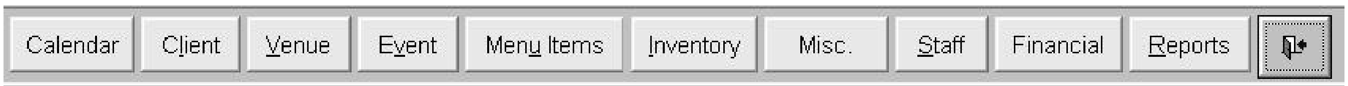
*A step by step guide*

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).

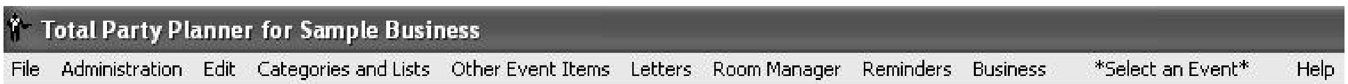
*Notes:*

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**:




The document refers to this as the **Menu Bar**:




## Let's get started!!

### *Step 1.  Edit Business Information and Taxes*

From the Menu Bar, select '**Business'**> **Business Information & Taxes**'.  The '**My Business Information**' window appears.

*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.

  Helpful Hint:  Use the Tab key to navigate from field to field.
- Click the '**Save**' button located at the lower right hand corner of the screen to save the data.

*Tax Values Tab*

- Click the '**Tax Values**' tab.
- From the '**Tax Location:**' dropdown list (labeled in red), select the option '**<ADD NEW>**'.  The '**Tax Location**' dialog box appears.
- 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. The '**Update Taxes**' window appears.
- Type in the appropriate tax rate numbers for '**Tax 1:**', '**Tax 2:**', and '**Tax 3:**'. (Typically you will only have one tax scheme. Enter '0' for Taxes 2 and 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.
- 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. The '**Tax Rules**' window appears.
- 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*

- Click the '**Client'** button on the Main Tool Bar. The client '**General Information**' tab is displayed.
- Click on the '**New Client'** button located at the lower left hand corner of the screen.
- 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 located at the lower right hand corner of the screen.

## *Step 3. Add the Event Venue*

- Click the '**Venue'** button from the Main Tool Bar. The venue '**Main**' tab is displayed.
- Click the '**New Venue'** button located at the lower left hand corner of the screen.

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 located on the right hand corner of the screen.

*Link Area(s) Setup* – this is an **OPTIONAL** section for off premise Venues.

Helpful Hint: 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 '**Add Area'** button. The '**Edit Room/Area**' window appears.
- Type in the name of your 1st Area. Optionally, you may also enter a short note.
- Click the '**Save'** button. The Area is now visible in the grid.
- Repeat as necessary 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?:**' check box*.
- Click the '**Save**' button at the lower right hand corner of the screen.

*Room(s) Setup:*

- Click the '**Facility Rooms**' tab.
- Click the '**Add Room'** button. The '**Edit Room/Area**' window appears.
- Type in the name of your 1st banquet room. Optionally, you may also enter a short note.
- Click the '**Save'** button. The banquet room is now visible in the grid.

  Helpful Hint:: Any room can be further divided into multiple smaller rooms. Click the '**Add Sub Room**' functionality to add a sub room to the room just entered.

- Repeat as necessary for other banquet rooms in your facility.

## *Step 4. Add Event Menu Items*

Menu Items are the specific items that appear on your menu (ex: salads, entrees, desserts).

- Click the '**Menu Items**' button on the Main Tool Bar. The '**Menu Items**' tab is displayed. Available items currently in the database are listed on the left. The *currently selected* item is detailed on the right.
- Click the '**New Menu Item'** button at the lower left hand corner of the screen.
- Enter the name of the menu item in the '**Display Name:**' field to the right.
- Leave the '**Search Name:**' field blank.
- Select an appropriate category from the '**Item Category:**' dropdown list.

  Helpful Hint*:* This list can be updated to match your business requirements. For now, select one of the pre-loaded items. See the electronic help guide for information on updating the list.

- Enter a description of the Product in the '**Description:**' field. 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 at the lower right hand corner of the screen.
- Repeat the above steps for all the Menu Items required for the Event.

  Helpful Hint: 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

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**' or '**Other**'.

Helpful Hint: Add Inventory items with a classification of '**Food**' for purposes of building your Menu Item recipe ingredients. For simplicity, this guide will not cover the building of recipes. Refer to the electronic help guide for more detailed information on building recipes.

- Click the '**Inventory**' button from the Main Tool Bar. The '**Inventory**' tab is displayed. Any available items in the database are listed in the grid.
- Click one of the '**Beverage**', '**Equipment**', or '**Other**' options in the '**Show in Grid…**' frame, depending on the type of inventory (beverage or rental) to be added.
- Click the '**New Inventory**' button at the lower left hand corner of the screen.
- Enter the item name in the '**Item Name'** field (how you would identify the inventory) and select a '**Category:**' from the drop-down list.

  Helpful Hint: The category list can be updated to match your business requirements. For now, select one of the pre-loaded items. See the electronic help guide for information on updating the list.

- For rental Inventory, check the '**Include in Service Charge/Gratuity**' checkbox if this item should be calculated in any applicable service charge/gratuity.

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

- Enter the *numeric* portion of the item's purchase amount in the '**Prch Amt**:' field. Ex: 1
- Enter the measurement portion of the item's purchase unit of measure in the '**Prch Meas:**' field. Ex: Case(s)
- Enter the Cost for the purchase detail in the '**Prch Cost:**' field.
- Leave the default '**Start Date:**' or enter an effective date for this item's pricing. 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 for this item from the '**Vendor:**' drop-down list. Choose 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. Ex: 12
- Enter the measurement portion of the item's shelving unit of measure in the '**Shelf Meas:**' field. Ex: Can(s)

  Helpful Hint: 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 actual charge to the client in the '**Sale Price:**' field.

* Click the '**Save**' button.
* Repeat the above steps for all the beverages and/or rentals required for the Event.

As time goes on, Inventory costs will change. View and Update the cost detail by clicking on the '**View/Update Units, Cost, Price**' tab. Refer to the electronic help guide for more detailed information on updating costs.

## Step 6. Adding Miscellaneous Charges

Miscellaneous Costs are charges to the Client 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. Any available items in the database are listed on the left. The currently selected item is detailed on the right.
- Click the '**New Miscellaneous'** button at the lower left hand corner of the screen.
- Enter the miscellaneous items '**Name:**' and select a '**Category:**' from the drop-down list.

  Helpful Hint*:* The category list can be updated to match your business requirements. For now, select one of the pre-loaded items. Refer to the electronic help guide for information on updating the list.
- Select a '**Type:**' from the drop-down list. Miscellaneous Costs are divided into four 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.
- The '**Tax Exmt @:**' selection assigns the proper tax to your Events that are marked as tax exempt. Typically this will remain as Non Taxable.
- Check the '**Svc Chg/Grat:**' option if this item should be calculated in any applicable service charge/gratuity.
- 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 at the lower right hand corner of the screen to save the data.
- Repeat the above steps to add any other Miscellaneous items required for the Event .

## And now… pulling it all together for your Event!!

### *Step 7. Setup the Event*

- Click the '**Client**' button on the Main Tool Bar.
- The Client entered in Step #2 should still be active on the screen. If not, select the Client from the '**Select:**' drop-down list.

  Helpful Hint: The '**Select:**' list can be sorted by Last Name, Company, or Contact in the '**Sort Select List By:**' frame.

- Click the '**New Event (This Client)**' button at the bottom of the screen. The '**Event Setup**' window appears with the selected Client displayed.

#### *Main Tab*

*General Detail Frame*

- Double click the green '**Event Date:**' text box. The '**Select Date**' window appears. Use the calendar to select the Event date. The viewed month and year may be changed from the drop-down lists above the calendar.

  Helpful Hint: Be sure to click the desired day on the calendar before clicking the '**OK**' button.

- Change the status in the '**Status:**' drop-down list if necessary.
- Enter '**Guest Count:**', '**Occasion:**', and '**Srv Style:**'. These are required fields.

  Helpful Hint: The Occasion and Service Style drop-down lists can be updated to match your business requirements. For now, select one of the pre-loaded items. See the electronic help guide for information on updating the list.

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

*Venue Sub-Tab*

- Select the Venue for this Event in the '**Name:**' drop-down list. The selection should be the Venue added in Step # 3.
- Optionally, use the '**Assign**' button to further define the banquet room(s)/areas setup in Step #3. Select the appropriate room/area and click the '**Assign to Event**' button. Repeat for all rooms/areas 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.
- Times can be added by clicking the '**Add or Remove Times**' button.
- Select a Time Value 9start, load, cleanup, etc) from list.

- Select any time value (ex:12:00 PM) from the drop-down list.
- Optionally enter in any applicable notes related to that time.

  Helpful Hint: Time codes are maintained (add, edit, delete) through the '**Categories and Lists'** menu option.

- Click the '**Add Time to Event**' button.

  Helpful Hint: By default, the date associated to the time will be updated to the event date. If the date is not the same (perhaps the setup date is the night before), enter the appropriate date now.

- When all applicable times have been added, click the '**Done**' button.

*Invoice Dtl Sub-Tab*

- Select the tax from the '**Tax Location:**' dropdown list. This was entered in Step #1. If the client is tax exempt, check the '**Tax Exempt:**' checkbox.
- 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.
- Optionally, enter service charge % (and what it applies to), payment terms, net due days, and deposit data.

  Helpful Hint: Deposits can be specified as a percentage of the entire bill or a flat rate. Put the amount (percent or dollar) in the text box. Specify the type by choosing the appropriate '**Percent %**' or '**Fixed Flat Rate**' option.

- Click the '**Save**' button at the lower right hand corner of the screen.

## *Notes Tab*

- Click the '**Notes**' tab of the Event module.

  Helpful Hint: 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. The flexibility is there for you.
- 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*

The Menu Items were added through the Menu Item module in Step #4.

- 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.

- Per Serving Pricing only: Select the '**Per Serving Pricing**' option from the dropdown list located at the top middle section of the screen. It may already be selected by default.
- Itemized Pricing only: Select the '**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.

  Helpful Hint: Filter the selection list on the right by clicking on one of the '**Category:**' or type in the first few characters of a specific item in the '**Grid Filter:**' box.
- Enter the '**Invoice Qty**:'. The '**Kitchen Qty**' defaults to the same unless changed. You may also add notes or change the description.
- Click the '**Add Selected Item to Event Menu**' button, or as a shortcut, double click the menu item in the list.

  Helpful Hint: If a Menu Item you require does not exist in the list, click the '**Quick Add a New Menu Item**' button. Refer to Step #4 for adding a new Menu Item.
- Repeat the above steps to add other Menu Items. When all Menu Items have been added, click the '**X**' button at the upper right hand corner of the screen.
- Per Serving Pricing only: Click the '**Update Servings / Price /Tax ->**' button located at the bottom middle section of the screen. The '**Edit Menu Pricing'** window appears.
  - Enter the total number of '**Servings:**' (this value is already defaulted to the Event guest count) and the '**Price Per Serving:**'.

*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 Row**' button, or as a shortcut, simply double click the row in the menu grid. The '**Edit Menu**' window appears.
- Make any required changes to quantities and optionally add any client or kitchen notes.
- Click the '**Save**' button.

  Helpful Hint: The '**Kitchen Qty:**' field is updated via one of the '**Update Kitchen Qty:**' frame options.

  Helpful Hint: The '**Ala-Carte?:**' checkbox is enabled for Per Serving Pricing only. Any Menu Item marked as ala-carte is itemized/charged separately on the invoice from the Per Serving Price. Ie., they are *additions* to the Per Serving Price. This is a very flexible costing feature.

### *Beverages & Rentals Tab*

Both Beverage and Rental items were added through the Inventory module (Step #5).

- Beverages Add: Click on the '**Beverages**' tab of the Event module. Click the '**Add Beverage to Event**' button. The '**Event Beverage Selections**' window appears.
- Rentals Add: Click on the '**Rentals**' tab of the Event module. Click the '**Add Rental Item to Event**' button. The '**Event Rental Selections**' window appears.
- Select the Inventory item added above from the '**Available Inventory…**' grid.
- Enter the event amount and order amount required.
- Check the '**Invoice By Use**' box to charge this item on the Invoice. Otherwise it will be cost internally only.
- Click the '**Add Sel. to Event**' button.
- Continue to add all required Beverages or Rental items. Click the '**X**' button at the upper right hand corner of the screen when done.

  Helpful Hint: 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.

#### *Editing a Beverage or Rental Row*

- Select the particular grid row to update.
- Click the '**Edit / View Row**' button. As a shortcut, simply double click the grid row. The '**Edit…**' window appears.
- Make required changes and click the '**Save**' button.

### *Miscellaneous Tab*

Miscellaneous items were added through the Miscellaneous module (Step #6).

- Click the '**Misc.**' tab of the Event module.
- Click the '**Add Miscellaneous to Event**' button. The '**Select Miscellaneous Items for Event**' window appears.
- Select a Miscellaneous item from the '**Available Miscellaneous Items in Database:**' grid.
- If applicable; enter a quantity under '**Num Items**' and possibly '**Hrs/Item**' depending on the miscellaneous type.
- Click the '**Add to Event**' button.
- Repeat for all additional items required for this Event. When finished, click the '**X**' button at the upper right hand corner of the screen.

#### *Editing a Miscellaneous Row*

- Select the particular grid row to update.

- Click the '**Edit Row**' button, or as a shortcut, simply double click the row in grid. The '**Edit Event Miscellaneous**' window appears.
- Make required changes and click the '**Save**' button.

### *Step 8. Reporting*

- 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**'.
- 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**'.
- Select the '**Sample**' contract from the '**Print Contract:**' dropdown list. The contract is fully customizable. Refer to the electronic help guide for further instructions on editing the contract, or creating a new one.
- 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**'.
- Click the '**Preview**' button.

*Note*: Total Party Planner provides **many other** useful reports to help organize your planning and follow-up for each event. Take some time to familiarize yourself with those reports.

## Congratulations!! Your First Event is Complete.

We hope this guide was helpful. 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.