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EVENT MANAGER MODULE

DovePOS includes an optional *Event Manager* module. This module allows you to schedule and manage all Events hosted by your shop. You can set up tasks, consultations and proposals on the new calendar to assist you in planning events for your customers. This module also allows custom event locations, vendors and products to be created in your DovePOS system to allow further assistance when creating your Event Manager.

Email Account Setup

Before certain options can be used in the Event Manager module, you must connect DovePOS with your shop's email service. This will allow emails to be sent directly from your shop's email address and is done directly through DovePOS.

From the main DovePOS window, click **Tools**.

- 1. Click System Setup.
- 2. Select Email Account Setup.
- Under the Account Settings pane, fill out the requested information:

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			1	
		~		

You may not know some of this information. For

assistance in finding out the details required, contact your email service provider. This information may also be available on their website.

mail Account Setup	X
Here you may enter your email account settings. The attachments via your existing email account. You wi inbox.	Il see your customers' replies in your existing email
	Shop Vance's Shop - 001
Account Settings	Test Message
Email Account Name * Email Address *	 Test the settings entered by sending a test message to an email address to which you have access. You may use the email address that you are setting up. Email Address
Outgoing Mail Server *	Send Test Message
User Name	
Password	Server Port Numbers Outgoing Server (SMTP) Port *
Confirm Password	Encryption Type None
Use Secure Password Authentication (SPA)	
	Save Close

Below is a list of the most common email client information:

Email Account Name	Yahoo.com	Gmail.com	Outlook.com/Hotmail.com	AOL.com
Outgoing Mail Server	smtp.mail.yahoo.com	smtp.gmail.com	smtp.live.com	smtp.aol.com
Use Secure Password Authentication (SPA) Checkbox	Yes	Yes	Yes	Yes
Outgoing Server (SMTP)	465	465	587	587
Encryption Type	SSL	SSL	TLS	SSL



- o Email Account Name
- o Email Address
- Outgoing Mail Server
- o User Name
- o Password
- Confirm Password
- o Use Secure Password Authentication (SPA) checkbox
- o Outgoing Server (SMTP) Port
- Encryption Type

Once you are done entering in the information, to verify all the settings you entered, it is a good idea to send a **Test Message** to yourself.

- 4. Enter any email address you have easy access to checking into the **Email Address** field. This can be the same email address you are using.
- 5. Click Send Test Message.

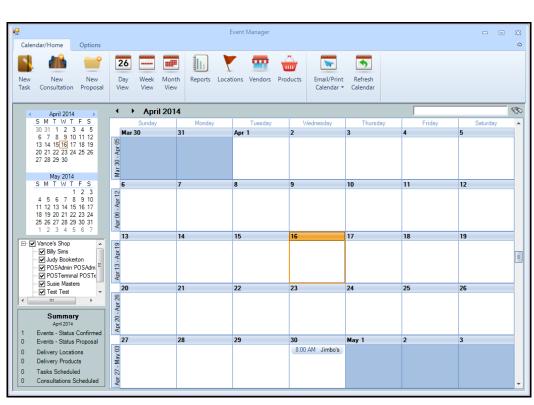
Wait between five to ten minutes. If you have not received the **Test Message** from the email address you entered, there may be an issue with the information given. Double check all your settings and attempt again.

Navigating Event Manager

Once you purchase the *Event Manager* module, a new option called **Event Manager** will be added to your **Tools** menu.

To access the *Event Manager* module, click **Tools** and select **Event Manager**.

Starting from the top of the page, are two separate tabs: Calendar/Home and Options. These





separate tabs will change the toolbar at the top of the page.

- **Calendar/Home** This is the default view for the *Event Manager*. It contains all the toolbars and options to setup and schedule Event Manager.
- **Options** The options tab will allow you to adjust settings regarding events and their progress or types, any roles as well as the proposal and email setup.

On the Calendar/Home tab, the accessible options are:

- **New Task** Selecting *New Task* will open the *Create Calendar Entry* window. This will allow you to enter a new *Task* in case you need to remind yourself of something.
- **New Consultation** Selecting *New Consultation* will open the *Create Calendar Entry* window. This will allow you to schedule a new *Consultation* with a customer and add it to the calendar.
- **New Proposal** Selecting *New Proposal* will open up the *Event Entry* window. Entering information in here will create a new event on your calendar.
- **Day/Week/Month View** There are three different ways you can view your calendar. The default will be set to monthly view.
- **Reports** Selecting *Reports* will open a window similar to the normal *Reports* option in DovePOS. However, this will only show reports related to Event Manager.
- **Locations** Selecting Locations will open the Location Maintenance window. From here, you can enter or adjust any location information.
- **Vendors** Selecting *Vendors* will open the *Vendor Maintenance* window. From here, you can enter or adjust any vendor information.
- **Products** Selecting *Products* will open the *Product Lookup* window. This is the same *Product Maintenance* as normally accessed in DovePOS.
- **Email/Print Calendar** Selecting *Email/Print Calendar* will give you two options: to *Email* the *Calendar* or *Print* the *Calendar*.
- **Refresh Calendar** The *Refresh Calendar* button will update the calendar to ensure that any new information has been added.

Event Calendar

The *Event Manager* module will come with a built in calendar that will help you to organize, schedule, and create events that your shop will participate in. This calendar can be viewed in many different ways. Each view will show different amounts of detail depending upon which you select.

• **Day View** – Selecting **Day View** will allow you to see your calendar starting with the current day divided up into 30 minute segments. You can change which day you are viewing by selecting the **left** and **right** arrows located next to the month and year above the calendar.



- Week View Selecting Week View will allow you to see your calendar starting with the current week divided by each day. You can change which week you are viewing by selecting the left and right arrows located next to the month and year above the calendar.
- **Month View** Selecting **Month View** will allow you to see your calendar starting with the current month divided by each day. You can change which month you are viewing by selecting the **left** and **right** arrows located next to the month and year above the calendar.

In the upper right hand corner of the calendar is a search box. You can use this field to enter information that you may need to search for.

On the left side of the screen are two miniature calendars for the current and next month. You can select any day shown on these calendar to pull up a **Day View** of the selected day. The month on these calendars can be changed by selecting the **left** and **right** arrows located next to the month and year above the calendar.

Below the miniature calendar is a shop selection tool. In this window, by default every active employee and every shop is selected. The entries that appear on the current calendar view are filtered by selecting or deselecting items on this window.

In the bottom left corner of the *Calendar* window is the *Event Summary* pane. This pane will display summary information for the currently selected month.

Refresh Calendar

On the far right side of the toolbar is the **Refresh Calendar** button. Click the **Refresh Calendar** button and the calendar will update with the latest information from all systems within your shop.



New Task

When hosting Event Manager, lots of things need to be scheduled, items need to be gathered and arranged, and certain people may need to be contacted. The *New Task* feature was added to give you a

hand by allowing you to create reminders for yourself or your employees that will be placed on the calendar.

Create a Task

- 1. Click **New Task** from the toolbar.
 - The Calendar Item field will default to Task.
- 2. Enter task information in the fields provided:



Fields marked by an asterisk will be required.

- Calendar Item*
- Store*
- Consultant*
- o Send Email Request to Consultant checkbox
- Contact Type
- o **Event**
- o Subject
- o Start Date
- o Start Time
- o End Date
- o End Time
- First Name
- o Last Name*
- o Phone

Calendar Item * Task	Store * Vance's Shop	Wednesday, April 16
Consultant *	Contact Type None	8 am
Send Email Request to Consultant		9 00
Event (none)	Contact First Name Last Name*	10 00
Subject	Phone Phone Type	11_00
Start Date Start Time 04/16/2014 8:00 AM		12 ^{pm}
End Date End Time 04/16/2014 8:00 AM	Email Address	1_00
Notes	Send Email Request to Contact	2
	A	^ 3.00
		4_00
	-	÷ 5 ⁰⁰



- o Phone Type
- o Alternate Phone
- Alternate Phone Type
- Email Address
- o Send Email Request to Contact checkbox
- o Notes

A **Day View** calendar for the date selected is shown to the right of this information. Click **Save and Close** if you are complete or **Save and New** if there are additional tasks to add.

• Click **Close** to exit without saving.

Delete a Task

- 1. Double click the *Task* from the **Calendar**.
- 2. Click Delete Task.
- 3. A Delete Confirmation will appear, click Yes to delete the Task.
- 4. The **Task** will then be deleted.

New Consultation

When you are meeting a client for the first time regarding an event, be sure to place the consultation on the calendar by creating a new *Consultation*. That way, you can gather all the information necessary to your shop and place it all on your calendar.

Create a Consultation

- 1. Click **New Consultation** from the toolbar.
 - The Calendar Item field will default to Consultation.
- 2. Enter information in the fields provided:



Fields marked by an asterisk will be required.

- Calendar Item*
- o Store*
- Consultant*



- Send Email Request to Consultant checkbox
- Contact Type
- o **Event**
- Subject
- Start Date
- o Start Time
- o End Date
- o End Time
- First Name
- Last Name*
- o Phone
- Phone Type
- o Email Address
- o Send Email Request to Contact checkbox
- Notes

A Day View calendar for the selected date is shown to the right of this information.

- 3. Click **Save and Close** if you are complete or **Save and New** if there are additional consultations to add.
 - Click **Close** to exit without saving.

Delete a Consultation

- 1. Double click the *Consultation* from the **Calendar**.
- 2. Click Delete Consultation.
- 3. A Delete Confirmation will appear, click Yes to delete the Consultation.
- 4. The **Consultation** will then be deleted.

New Proposal

The creation of a Proposal will allow you to lay out an event and provide clear and concise direction that you can give to your customer. Ensuring that your proposal is easy to read and organized will give your customer peace of mind knowing that the event they are hosting is in good hands. You can customize your proposal to suite your needs so that your customer knows immediately who they have handling the

Event Entry		Event Entry		
Task Details	cocations Products Purchasers Sur	mmary Print Options Share Ev	ent Vendors tes	
General Information	Event Name *	Start Time	End Time 9:00 AM	Store * Vance's Shop
Event vent Date * Vednesday, 04/16/2014	Theme	Consultant	SUU AM Designer	Vance's Shop
Budget \$0 Deposit Required \$0.00	Event Paid by Date Wednesday, 04/09/2014	Create Action Item 7 Da		Discount % 0 Estimated Discount \$0.00
SUUU Event Progress *	Sunday, 02/16/2014	Create Action Item 7 Da		Cancel Fee E
Contact	, _ ,			
First Name Last Na	ame* Phone 1	Type	Email Addres	ss 1
Address *	Phone 2	Туре	Email Addres	ss 2
Country*		_		
United States	_			Create Event

event. During the creation of a Proposal, the Event Progress is a very important detail as must be updated to perform certain actions. Click here to view more information on <u>Event Progresses</u>.

Create a Proposal

1. Click New Proposal from the toolbar.

The creation of an event requires a lot of information. In the fields listed below, fill all the information out to the best of your ability.

2. Enter General Information in the fields provided:



Fields marked by an asterisk will be required.

- Event Type*
- Event Name*
- Start Time
- o End Time
- o Store*



- Event Date*
- o Theme
- Consultant
- Designer
- 3. Enter Financial Information in the fields provided:
 - o Budget
 - Event Paid by Date
 - Event Paid by Action Item Reminder checkbox
 - o Discount %
 - Deposit Required
 - Deposit Paid by Date
 - Deposit Paid by Action Item Reminder checkbox
 - Event Progress*
 - o Cancel Fee
 - Create Orders for all Locations or Create separate Orders by Location
- 4. Enter Contact Information in the fields provided:



Fields marked by an asterisk will be required.

- o First Name
- Last Name*
- Address*
- o City*
- o St/Pr
- Zip/Postal*
- Country*
- o Phone Number
- o Type



- o Alternate Phone Number
- Alternate Phone Type
- o Email Address
- o Alternate Email Address
- 5. With all information entered, click **Create Event**.

Once the proposal has been created, the Event can be modified with further details and information.

Reports

Additional Reports have been added to provide support for the Event Manager. These reports detail information regarding event locations, vendor information, and much more.

1. To pull up a report, click **Reports** from the *Event Manager* window.



This page should be familiar to you as it is the exact same as the normal *Reports* page.

- 2. Highlight the **Report** you want to run.
- 3. Enter any additional Report Criteria.
- 4. Click **Display Report**.

The reports available to be run for Event Manager are:

Event Locations Report – The Event Locations report contains information summarizing events based upon the event count and dollar amounts spent at each location.

Event Management Report – The Event Management report contains a list of current events in progress and displays pertinent information on each event such as: Event Name, Progress, Event Date, Event Creation Date, and Contact Information.

Event Vendors Report – The Event Vendors report contains information summarizing vendors used at events based upon the event count and dollar amounts spent at each location.

Select a Report	
All Reports	
Event Locations Report Event Management Report Event Vendors Report	



Locations

Locations, or where your event will be held, can be added in two different ways. They can be added as temporary locations, in case the event is hosted at a location you don't expect to go to again, or they can be added in to the Location Maintenance as a permanent Location.

New Location

 To permanently add a Location, click Locations from the Event Manager window.



Temporary Locations can be added during the Event Entry process by

Location Maintenance	
Search	Location Details
Location Name	Name*
, Start Date End Date (none) (none) Search Reset Search	Rating ☆☆☆☆☆☆ Address
Event Locations	City St/Pr Zip/Postal
	OK
	United States
	Contact First Name Contact Last Name
	Phone Phone Type
	Email Address
Show Inactive Locations	Notes
Use Selected Location Add New	Save Cancel Changes

filling in the information on the Locations tab.

When you first start using Event Manager, there will be no Event Locations in your system.

2. Since we're adding a new *Location*, click **Add New** at the bottom of the *Search* pane.

The Search pane will no longer be selectable and the Location Details will be available.

3. Enter information in to the fields provided:



Fields marked by an asterisk will be required.

- o Name*
- o Location Active checkbox
- o Rating out of Five Stars
- o Address
- o City
- o St/Pr
- o Zip/Postal



- o Country
- Website
- Contact First Name
- Contact Last Name
- o Phone
- Phone Type
- o Alternate Phone
- Alternate Phone Type
- o Email Address
- o Notes
- 4. Once all information has been entered, click **Save**.
 - o If you want to cancel without making any changes, click Cancel Changes.
- 5. Press **Close** to exit the *Location Maintenance* window.

Edit a Location

- 1. Click Locations from the Event Manager window.
- 2. Enter all necessary Criteria in to the Search pane.
- 3. Click Search.
- 4. Select the **Event Location**.
- 5. In the Location Details pane, make any necessary changes.
- 6. Click **Save** when all changes have been made.
 - o If you want to cancel without making any changes, click **Cancel Changes**.



Vendors

Adding a Vendor to your system will allow you to associate a product a vendor may provide with an event. Vendors are not directly associated with an event, only the products that they provide. Vendors can be added to your system through the **Vendor Maintenance** window on the *Event Manager* window or through the *Event Entry* window.

> To add a Vendor, click Vendors from the Event Manager window.

When you first start using Event Manager, there will be no Vendors in your system.

2. Since we're adding a *Vendor*, click **Add New** at the bottom of the *Search* pane.

The Search pane will no longer be selectable and the Vendor Details will be available.

3. Enter information in to the fields provided:



Fields marked by an asterisk will be required.

- o Name*
- o Vendor Active checkbox
- o Category
- o Rating out of Five Stars
- o # Events
- o Total \$
- o Address
- o City

Search		Vendor Details	
Vendor Name	Category	Name*	
	-		Active
Start Date End Date			ating
(none) (none)	•	Decoration 👻 🏹	*****
Search	h Reset Search	# Events To	tal \$
Vendors			\$0.00
Vendor Name 🛆	Rating	Address	
	naung		~
		City St/Pr	Zip/Postal
		Country	
		United States	
		Website	
		Contact First Name Contac	t Last Name
			-
		Phone Phone	lype
			<u></u>
			T
		Email Address	
Show Inactive Vendors			
		Notes	
			*
			~
Use Selected Vendor	Add New	Save	Cancel Changes

- o St/Pr
- o Zip/Postal
- Country
- o Website
- Contact First Name
- Contact Last Name
- o Phone
- Phone Type
- Alternate Phone
- Alternate Phone Type
- Email Address
- o Notes
- 4. Once all information has been entered, click Save.
 - o If you want to cancel without making any changes, click **Cancel Changes**.
- 5. Press **Close** to exit the Vendor Maintenance window.

Edit a Vendor

- 1. Click **Vendor** from the *Event Manager* window.
- 2. Enter all necessary Criteria in to the Search pane.
- 3. Click Search.
- 4. Select the Vendor.
- 5. In the Vendor Details pane, make any necessary changes.
- 6. Click **Save** when all changes have been made.
 - o If you want to cancel without making any changes, click Cancel Changes.

Use Selected Vendor

The Use Selected Vendor button in the Vendor Maintenance window is a shortcut that will open the Create Calendar Entry window and automatically fill out the details of the vendor. From there, you can create either a New Task or Consultation.

1. Click **Vendor** from the *Event Manager* window.



- 3. Click Search.
- 4. Select the Vendor.
- 5. Click Use Selected Vendor.

Products

When you click **Products** from the *Event Manager* window, the **Product Lookup** for DovePOS will appear. This is the same **Product Lookup** you would normally see in DovePOS with the addition of two additional *Vendor* settings related to *Event Manager*.

By clicking **Modify** on any products you have in your store, you can pull up the **Product Maintenance** for that item. At the bottom of the **Product Information** pane are two new boxes. The **Vendor Product** and **Rental Product** check boxes.

C Vendor Product	E Rental Product
Vendor	Setup Required
Bob's Catering	→ hours

If you have partnered with a vendor, you have the ability to add any products that you may sell or rent on their behalf and list them as a *Vendor/Rental* product in your **Product Maintenance**.

Email/Print Calendar

In case you need to send the calendar to yourself at home, or a coworker, the option to **Email** or **Print** the calendar is available. When you email or print the calendar, the current view will be emailed/printed.

Email the Calendar

- 1. To *Email the Calendar*, select the calendar **View** you want to send.
- 2. Click Email/Print Calendar.
- 3. Select Email Calendar.
- 4. In the Send Email window, enter the Email Address.
- 5. Adjust the Subject, Comments, or Signature if necessary.
- 6. Click **Preview** to view what you will email.
- 7. Click Send Email to complete the process.

Print the Calendar

- 1. To *Print the Calendar*, select the calendar **View** you want to print.
- 2. Click Email/Print Calendar.
- 3. Select Print Calendar.

4. A report will load with the calendar, click **Print**.

Updating an Event

Once an event has been created, you can add additional information to the rest of the event. This information includes such things as: event progress, participants, locations, products, purchaser information, the event summary, vendors, event notes, and the ability to share the event and print information. Be sure to enter as much detail as you can in every single option.

- 1. From the *Event Calendar*, double click the event you want to add additional information to.
- 2. The event details window will open. Make any necessary changes.
- 3. Click Save after completing all changes.

Event Progress

The Event Progress will determine the current status of the event and should be frequently adjusted based upon how far along the event is. Certain actions that can be taken on an event may be locked until the appropriate status is updated.

Financial Information			
Budget \$0	Event Paid by Date Wednesday, 04/09/2014	Create Action Item 7 Days rior if not paid	Discount %
Deposit Required	Deposit Paid by Date Sunday, 02/16/2014	Create Action Item 7 Days rior if not paid	Estimated Discount \$0.00
Event Progress *			Cancel Fee \$0
C Create Orders for all Locati	ions 0 📩 Days Prior to Event Date		r to Location Date

Consultation Scheduled – This is the default status of a newly created event and will be automatically selected each time a new event is created.

Proposal Created – Once a proposal has been created and sent to the customer, the event progress should be updated to this status.

Confirmed – When an event is approved by your customer, the status should be updated to Confirmed. An account will be created with the event name and payments can now be made towards the account.

Completed – After an event has occurred and wrapped up, the status can be changed to Completed.

Cancelled – If a customer requests an event be cancelled, update the status to Cancelled. This will create an action item that will call attention to any orders that have been created on the account.

On Hold – If for any reason any work on an event needs to be paused, update the status to On Hold.

Participants

Participant types will be available in the menu based upon the type of event created.

With the event open

1. Click **Participants** from the toolbar.



- 2. In the **Participants** section, enter information for each participant in the following fields:
 - o Name
 - o Role
 - o Phone
 - Phone Type
 - Email Address
 - o Email Reminder

On the far right of the **Participants** list, the hand basket icon will take you to the **Products** page to associate the selected participant with a product.

3. Click **Save** after all additions or changes are completed.

Locations

With the event open

- 1. Click Locations from the toolbar.
- 2. In the Location section, enter information in to each field:



If you have the location already saved in your *Event Manager*, you can search for it by pressing the **Binocular** button and using **Location Maintenance** to pull up the location.

- Event Function Name
- o Location
- o Address
- o City
- o St/Pr
- o Zip/Postal
- Country
- Event Setup Fee
- o Delivery Fee
- Contact First Name
- Contact Last Name
- o Email Address
- Phone Number



- o Phone Type
- Alternate Phone Number
- Alternate Phone Type
- o Notes
- Function Date
- o Start Time
- o End Time
- o Delivery Date
- Delivery Time
- 3. Once all the information has been added, click Add New to add the location.
 - o Click **Reset** to clear all the entered data.



If you need to modify a location, click the **Location** from the bottom list. Make any adjustments to the information necessary and then click **Replace**.

Products

When you enter products for the event, the Products window will display the **Budget**, **Production Total**, **Est. Tax** and **Est. Total** to assist you in ensuring that your event does not go over the given budget.

With the event open

- 1. Click **Products** from the toolbar.
- 2. Click **Product Lookup**.
- 3. Find/Select the **Product** you want to add to the event.
- 4. Click Add to Event.

The product will be added to the list of rows.

- 5. Make any necessary adjustments to the products using the information entered in to the row. For instance, if you need to change the quantity.
- 6. The product can then be assigned to a participant, in the **Participant** field, select the assignee from the drop-down list.



This is the same as assigning a participant to a product using the hand basket icon on the **Participants** window.

7. Select which **Location** the product will be going to.

8. Update the **Setup** time in hours.

9. Enter a **Delivery Time**.

The information at the top of the window will update automatically.

10. Click Save.



At the bottom of the window, you may notice that the **Generate Orders** button is grayed out. This will become available to you when the *Event* is given a status of Confirmed.

Purchasers

The Purchasers page will detail information on the current cost of the event. From this window, you can assign purchasers for portions of the event or the entire event.

At the top of the page, current information on the payment regarding the event is shown. This information includes:

- Budget
- Est. Total
- Paid
- Est. Balance
- Assigned to Purchasers
- Unassigned

To Add a Purchaser

With the event open

- 1. Click **Purchasers** from the toolbar.
- 2. In the Purchaser Details pane, enter information in to the following fields:
 - o First Name
 - o Last Name
 - Phone Number
 - Phone Type
 - o Alternate Phone Number
 - Alternate Phone Type
 - Email Address

Purch		st. Total \$0.00	Paid	\$0.00 Est.	Balance	\$0.00	Assigne	d to Purchaser	s \$0.00	Ui	nassigned	\$0.00
	aser Details											
First Na Phone Email A	رT ا	Last Name /pe	I	Add estim Subtotal Assig \$0.00 Estimated Ta: \$0.00	gned	o Subtotal Assig Estimated Tax [8.375 Total Assigned [\$0.00	%	Purcha X Jimbo Jone		Assigned 0.00	\$0.00	Paid
Notes	Address			Add New	Replace	Res	et					Make Paymer
Salact Proc	ducts to Assign		_									
	Product	Description Tranged Roses	on	Qt 1	y \$0.0	Price	Discount 0%	Ext. Price \$0.00 -Jin	Particip mbo Jones	ant	Loc	ation
L 100		ranged Roses		1	\$0.0		0%		mbo Jones			



- o Notes
- o Add estimated taxes to Subtotal Assigned checkbox
- Subtotal Assigned
- Estimated Tax %
- o Estimated Tax
- o Total Assigned
- 3. In the *Products to Assign* pane, select any products that need to be assigned to the **Purchaser**.
 - This will apply the price of the product to the **Purchaser**.
- 4. Click Add New.



If you need to edit a **Purchaser**, select the **Purchaser** from the list. Make any adjustments to the **Purchaser Details** or assigned products. Click **Replace**.

Make a Payment



Before the ability to **Make a Payment** is enabled, the **Proposal** must be set to the **Confirmed** status. This setting can be found under the **Event Details** in the **Financial Information** pane.

- 1. Click Make Payment.
 - This will open the **Take Account Payment** window.



If the orders have not been created for this event, any payment made to the event will be listed as an **Unapplied Credit** that can be later credited towards the orders.

2. Take the **Payment** as normal.



Summary

The **Summary** page for an event displays the most important information for the event. This information includes:

- Event/Account Name
- Event Date
- Locations
- Proposal Date
- Confirmed Date
- Budget
- Estimated Total
- Payments
- Paid
- Balance
- Assigned
- Unassigned

The page will also include all the currently listed **Purchasers** and their information regarding any payments that they have made. All this information can be printed from the *Print Options* page.

Print Options



Before you can email any information on this page, the <u>Email Account Setup</u> must be completed.

There are three panes that print different items.

Proposal Printing Options

In this pane, you can print/email the **Proposal**, **Event Agenda**, and the **Payment Summary**.

Delivery and Design Printing Options – In this pane, you can print/email the Design Information and the Delivery Information (Bill of Goods).

Print Options		
Proposal Printing Options		
the Default Proposal V	✓ the Event Agenda	
Include a cover page	✓ the Payment Summary	
Include a cover page Include product prices	• the Payment Summary	
Include product prices Include product recipes		Print/Email
Delivery and Design Printing Options		
Design Information	Delivery Information (Bill of Goods)	
Include product recipes	- Derivery morthauor (bin or docus)	Print/Email
Management Printing Options		
Participant list	Participant checklists	
Product labels	▼ Vendor product list	
▼ Product list		Print/Email
		<u>Print/Email</u>
		Sava

Management Printing

Options – In this pane, you can print/email the **Participant List**, **Product Labels**, **Product List**, **Participant Checklist**, and the **Vendor Product List**.

With the event open

- 1. Click **Print Options** from the toolbar.
- 2. Starting with the **Proposal Print Options** pane, select either **Print** or **Email** from the first dropdown list.
- 3. Select the **Proposal**.
- 4. Check any of the shown boxes if you want to include: a **cover page**, **product prices**, and **product recipes**.
 - o If you want to print/email the Event Agenda, select it from the drop-down list.
 - o If you want to print/email the **Payment Summary**, select it from the drop-down list.
- 5. Click the **Print/Email** button. Depending upon your selection, this will either pull up a report to print or the Email window. Complete each as necessary.

For the other panes available, the steps are the same. Select any information you want to print/email from the drop-down list.

Share

The Share feature will allow you to email different parts of the event to the contacts you have entered. To share an Event Detail



- 1. Click Share.
- 2. Select between:
 - Email Contact
 - Email Proposal to Contact
 - Email Agenda to Contact
 - Email Payment Summary to Contact
 - Email Consultant
- 3. Once the selection has been made, DovePOS will open the email window with the contact's email address already populated.



If you are emailing the proposal, agenda, or payment summary to a contact, these files will be inserted as an attachment to the email.

- 4. Enter in any additional information in to the body of the email.
- 5. Click Send.

Event Notes

The Event Notes feature functions similar to the notes feature when entering an order. You can store any relevant details that do not fit into other categories here.

- 1. To open the note, click **Event Notes**.
- 2. Enter any notes you want to save.
- 3. Click Save and Close.
 - o Click Cancel if you wish to exit at any time without saving.

Vendors

The vendor section during Event Entry is the same as on the front page. Before a vendor can be used, a product that vendor provides must be selected in the Products window. To review the Vendor information, <u>click here</u>.

Event Manager Options

The **Event Manager Options** offers access to change the defaults to most settings within *Event Manager*. From these options, you can also add more event types or add role checklists if you so choose. This includes changing settings for: **Event Options**, **Event Progress**, **Event Types**, **Roles** and **Role Checklists**, the default **Proposal** and the default **Email** setup.

To access the Event Manager Options, click Options from the main Event Manager window.

Next, we will go over each option available in each topic.

Event Options

The *Event Options* section offers setting changes for default mechanics of the creation of Events.

Require Consultant selection in Event Entry – Check this box if you want to require a consultant upon creation of an event.

Require Designer selection in Event Entry – Check this box if you want to require a designer upon creation of an event.

Event Manager	
Calendar/Home Options	۵
Event Event Types Roles Role Proposal Email Coptions Progress Types	
Event Settings Maintenance	
Require Consultant selection in Event Entry Exclude Account created for Event from Billing prior to Event Date	Require Designer selection in Event Entry
✓ Allow Email Updates and Reminders to the Event Contact	✓ Allow Email Reminders to Event Participants
Event Defaults Maintenance Deposit 5 🚔 % of budget	
Discount 0 💌 %	ocation Delivery Fee \$0
Cancellation Fee S0	
Deposit Due Date Deposit Deposit Deposit	Due Date Action Item 7 Days
Paid Due Date 7 Days Before Event Date Paid 1	Due Date Action Item 7 Days Prior to Paid Date
C Create Orders for all Locations 7 🔄 Days Prior to Event Date	eate separate Orders by Location 7 📩 Days Prior to Location Date
	Save

Exclude Account created for Event from Billing prior to Event Date – Check this box if you want to exclude the event account from billing until the event date has passed.

Allow Email Updates and Reminders to the Event Contact – Check this box if you want to allow event contacts to receive email updates and reminders.

Allow Email Reminders to Event Participants - Check this box if you want to allow event participants to receive email reminders.

Allow SMS Updates and Reminders to the Event Contact – Check this box if you want to allow event participants to receive SMS updates and reminders.

Allow Email Reminders to Event Participants – Check this box if you want to allow event participants to receive email reminders.

Deposit - Indicates what percent of the budget should be defaulted in to the Deposit field in Event entry.

Deposit Due Date – Indicate the default value in days/weeks/months for the *Deposit Due by Date*.



Deposit Due Date Action Item – Indicate the default value for the creation of an Action Item if the *Deposit Due Date* is not paid as required.

Paid Due Date - Indicate the default value in days/weeks/months for the Paid Due by Date.

Paid Due Date Action Item – Indicate the default value for the creation of an Action Item if the *Paid Due Date* is not paid as required.

Discount – Indicate the default value for the event discount.

Location Setup Fee – Indicate the default value for location setup fees.

Location Delivery Fee – Indicate the default value for location delivery fees.

Cancellation Fee – Indicate the default value for an event cancellation fee.

Choose Between:

- Create Orders for all Location Indicate if the orders from an event should all be created based on the event date in event entry.
- Create separate Orders by Location Indicate if the orders from an event will be created separately by locations based on each location's delivery date.

Event Progress

The **Event Progress** button will allow you to add a new progress, adjust whether or not certain event progresses are active and shift their position in the selection process up or down. Progress Types that are bolded cannot be edited; however, they can be moved.

Add a New Event Progress

- 1. Click Reset.
- 2. Enter a Progress Name.
- 3. Select the progress meaning under **Event Status**.
- 4. Click Add New.
 - To exit without making any changes, click **Reset**.
- 5. Click Save.

Move a Progress

Progress Name: *	Event Status:	Event Status:				
	Consultation (No orders/account charges/auto reminders will be generated)	•				
Active:						
v	Add New Replace Reset					
ProgressName	Event Status	Active				
(Consultation Scheduled) (Proposal Created)	Consultation (No orders/account charges/auto reminders will be generated) Proposal (No orders/account charges/auto reminders will be generated)	V				
(Proposal Created) (Confirmed)						
(Completed)	Confirmed (Orders/account charges/auto reminders will be generated according to event date(s)) Completed (No new orders/account charges/reminders will be generated)					
(Cancelled)	Cancelled (No orders/account charges/auto reminders will be generated)	✓ ✓ ✓ ✓				
(On Hold)	On Hold (No orders/account charges/auto reminders will be generated)	V				
	eleted. Show Inactive Event P	rogresse				
Bold items can't be modified or de						



By moving a progress, you adjust where it will be displayed in the drop-down list when you are selecting the status from the *Event Details* window.

- 1. Highlight the **Progress** you want to move up or down.
- 2. Click **Move Up** or **Move Down** to move the progress to the desired position.
- 3. Click Save.

Event Progress Activity

- 1. To make an *Event Progress Inactive*, select the **Event Progress**.
- 2. Uncheck the Active check box next to the Event Progress.
- 3. Click Replace.
- 1. To make an *Event Progress Active*, select the **Event Progress**.
- 2. Check the **Active** check box next to the *Event Progress*.
- 3. Click Replace.

Event Types

The **Event Type** button will allow you to add a new event, adjust whether or not certain event types are active and shift their position in the selection process up or down. Event Types that are bolded cannot be edited; however, they can be moved.

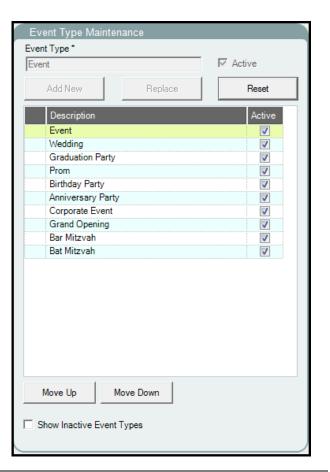
Add a New Event Type

- 1. Click Reset.
- 2. Enter an Event Type.
- 3. Click Add New.
 - To exit without making any changes, click **Reset**.
- 4. Click Save.

Move an Event Type

By moving an event type, you adjust where it will be displayed in the drop-down list when you are selecting the event type from the *Event Details* window.

1. Highlight the Event Type you want to move up





or down.

- 2. Click **Move Up** or **Move Down** to move the type to the desired position.
- 3. Click Save.

Event Type Activity

- 1. To make an *Event Type* Inactive, select the **Event Type**.
- 2. Uncheck the Active check box next to the Event Type.
- 3. Click Replace.
- 1. To make an *Event Type* Active, select the Event Type.
- 2. Check the Active check box next to the Event Type.
- 3. Click **Replace**.

Roles

The **Roles** button will allow you to add a new role, adjust whether or not certain role types are active and

shift their position in the selection process up or down. Role Types that are bolded cannot be edited; however, they can be moved.

Add a New Role

- 1. Select an Event Type from the drop-down list.
- 2. Click Reset.
- 3. Enter a Role.
- 4. Click Add New.
 - To exit without making any changes, click **Reset**.
- 5. Click Save.

Move a Role

By moving an event type, you adjust where it will be displayed in the drop-down list when you are selecting the event type from the *Event Details* window.

- 1. Select the **Event Type** from the drop-down list.
- 2. Highlight the Role you want to move up or down.

Select Event Type		_
Event Type * Wedding	•	•
Role *		
		_
Z Active		
Acuve		
Add New Replace		
Aud New Heplace		
Role Name	Active	*
Bride	V	
Groom	V	
Maid of Honor	V	
Best Man	V	
Bridesmaid	V	
Groomsman	V	Ξ
Mother of the Bride	V	
Father of the Bride	V	
Mother of the Groom	V	
Father of the Groom	V	
Usher	V	
Train Bearer	V	
Flower Girl	V	
Ring Bearer		
Registry Attendant	V	Ŧ
Move Up Move Down	Show Inactive Ro	



- 3. Click Move Up or Move Down to move the role to the desired position.
- 4. Click Save.

Role Activity

- 1. To make a *Role* Inactive, select the **Role**.
- 2. Uncheck the Active check box next to the Role.
- 3. Click Replace.
- 1. To make a *Role* Active, select the **Role**.
- 2. Check the Active check box next to the Role.
- 3. Click **Replace**.

Role Checklists

The Role Checklists

button will allow you to view, edit, and add tasks given to each member of an event's vital participants. This list can be set to email out to the person in any given role as long as their email address is listed in the participants section.

View a Checklist

1. Select an **Event Type** from the drop-down list.

lect Role Event Type * Role * Wedding Groom	Email Checklist when ever	nt confirmed		
Task/Reminder	When	Email R	eminder	
Choose Ceremony Location	12 Months before event.	CC Consultant		
Add New Replace Reset	When	Email Reminder	CC Cons	
Choose Ceremony Location	12 Months before event			
Choose Groom Party (Best man, Groomsmen, Ushers)	12 Months before event.			
Register for Wedding Gifts	12 Months before event.			
Book Officiate	9 Months before event.			
Book Band/DJ	9 Months before event.			
Create Guest List	9 Months before event.			
Plan Honeymoon	6 Months before event.			
Arrange Wedding Day Transportation	6 Months before event.			
Send Invitations	3 Months before event.			
Choose and Arrange for Wedding Day Clothing for You and Groomsmen	3 Months before event.			
Order Wedding Rings (Arrange Fittings and Inscriptions)	3 Months before event.			
Buy Gift for Bride	2 Months before event.			
Buy Groomsmen Gifts	2 Months before event.			
· <u> </u>				

- 2. Select a Role from the drop-down list.
- 3. The default *Tasks/Reminders* set up by Teleflora appear in the fields below.



An email with the full checklist will be sent to the selected role if the **Email Checklist when** event confirmed is checked.

Add a New Task/Reminder

- 1. To add a new Task/Reminder, select an Event Type from the drop-down list.
- 2. Select a Role from the drop-down list.



- 3. Click Reset.
- 4. Enter the **Task/Reminder** name.
- 5. Enter when the task needs to be completed.
- 6. Select if an **Email Reminder** needs to be sent on this *Task/Reminder*.
 - o An email can also be sent to the consultant by clicking the CC Consultant checkbox.
- 7. Click Add New.
 - To exit without making any changes, click **Reset**.
- 8. Click Save.

Move a Task/Reminder

- 1. Select the **Event Type** from the drop-down list.
- 2. Select the Role from the drop-down list.
- 3. Highlight the Task/Reminder you want to move.
- 4. Click **Move Up** or **Move Down** to move it to the desired position.
- 5. Click Save.

Delete a Task/Reminder

- 1. Select the **Event Type** from the drop-down list.
- 2. Select the **Role** from the drop-down list.
- 3. Highlight the Task/Reminder you want to delete.
- 4. Click the red **X** to the left of the Task/Reminder.
- 5. Click Save.

Proposal Setup

The Proposal Setup window allows you to alter the terms included on the proposal document to better fit the event process in your shop. It also allows custom proposal themes to be created and viewed prior to the themes being sent out.

Edit Proposal Terms

In the *Event Proposal Terms Maintenance* pane, you can update the terms of your proposal to fit the needs of your shop. This can be done by editing any of the text in the **Enter Terms** field.

If you are satisfied with your changes, click Save.

Custom Proposal Theme



In the Custom Proposal Themes Maintenance pane, you can create your own custom themes to be used in your proposals.

- 1. To add a new theme, enter a Color Theme Name.
- 2. Using the Import Logo button, select a Logo Image File for your shop from your system.
- 3. Select a Color Scheme from the drop-down list.
 - o A preview of the colors will appear to the left of the Color Scheme drop-down list.
- 4. Click Save.

Email Setup

The *Email Setup* window allows you to edit any of the emails that are sent from your shop regarding event information. All of these emails can be changed using this page, so be sure to look over all the **Email Types** available and make any changes necessary.

View/Edit an Email

- 1. If you have multiple shops, first select the **Shop**.
- 2. Select the Email Type.
- If necessary, update the information in the following fields:
 - o Email Subject
 - Email Message (Limit of 80 characters)
 - o Signature
- 4. Click Save.

	Char	
	Snop	Vance's Shop - 001
ail Type		
rent Calendar (Email) 🗨		
Enter Text		
Email Subject		
Event Manager Calendar		
Email Message		* Press F6 to insert merge field
Attached is the upcoming Event Manager calendar		
1		
		* Press F6 to insert merge field
Signature		
Vance's Shop		
Vance's Shop 3737 NW 34th St		
Vance's Shop 3737 NW 34th St Oklahoma City, Oklahoma 73112		
Vance's Shop 3737 NW 34th St		