DovePOS™

EVENT MANAGER

teleflora.

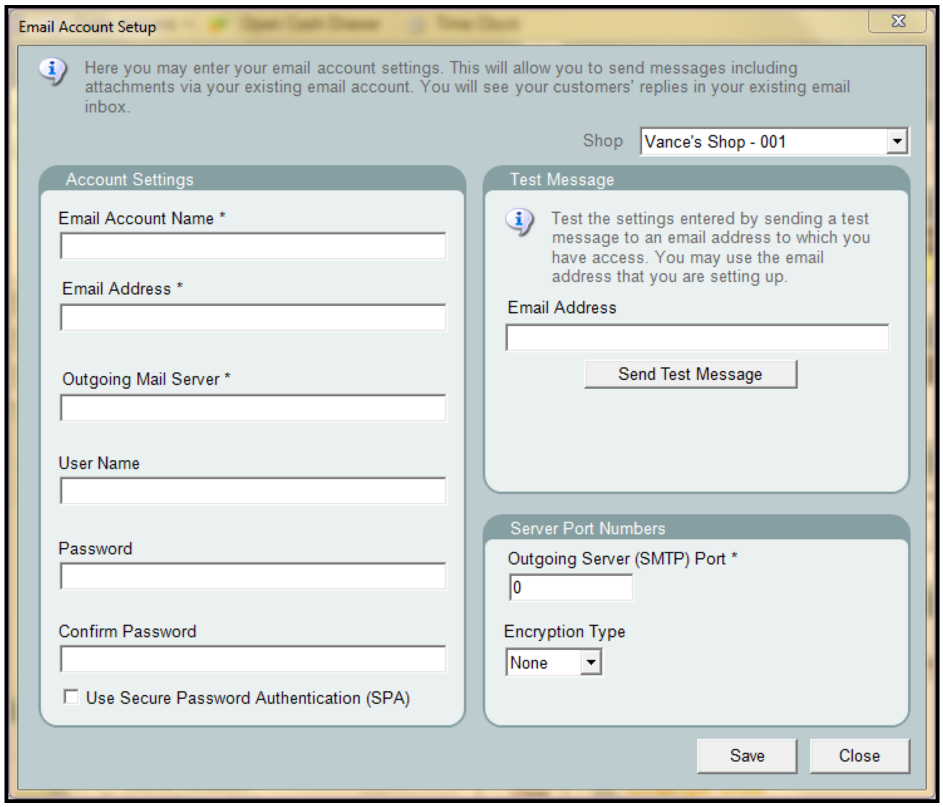
Contents

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**.
3. Under the **Account Settings** pane, fill out the requested information:

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.

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

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

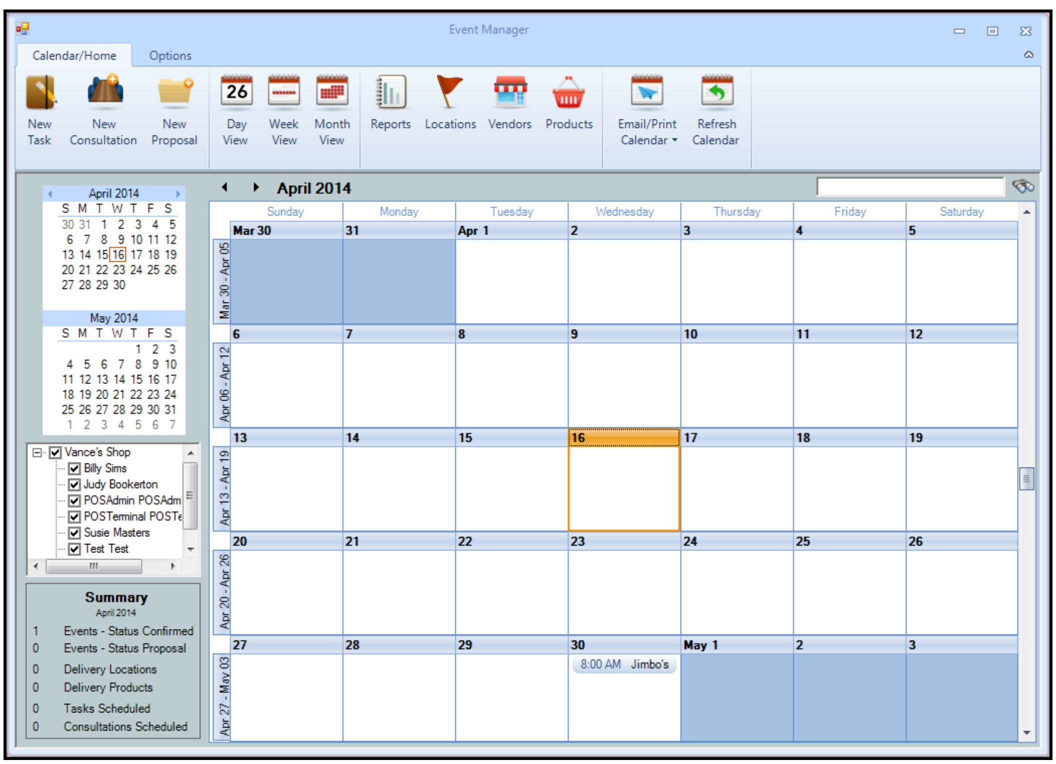
Once you are done entering in the information, to verify all the settings you entered, it is a good idea to send a **Test Message** to yourself.

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.

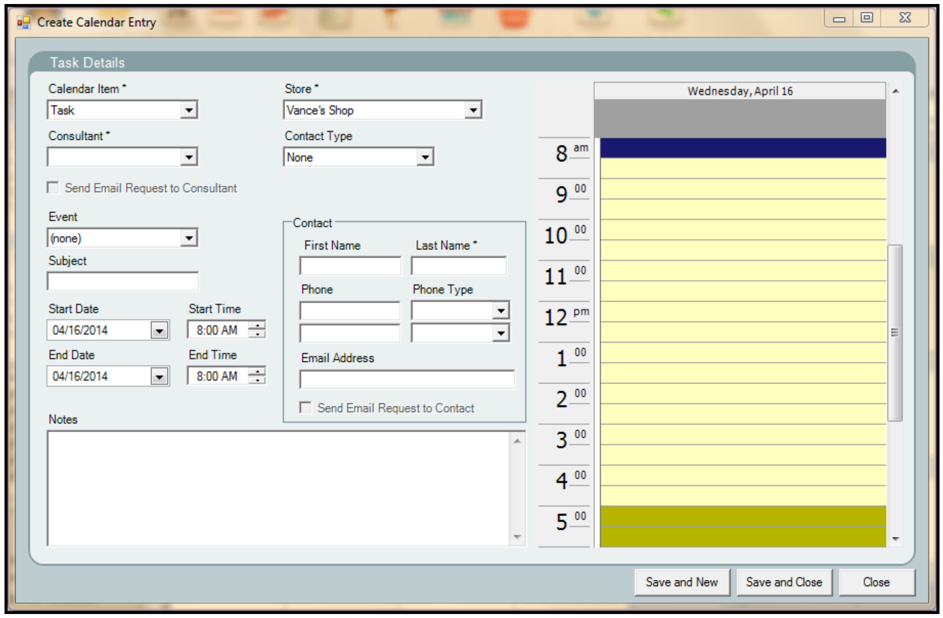
In the bottom left corner of the *Calendar* window is the *Event Summary* pane. This pane will display summary information for the currently selected month.

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

- o **Phone Type**
- o **Alternate Phone**
- o **Alternate Phone Type**
- o **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.

- o 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.

- o **Calendar Item***
- o **Store***
- o **Consultant***

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

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

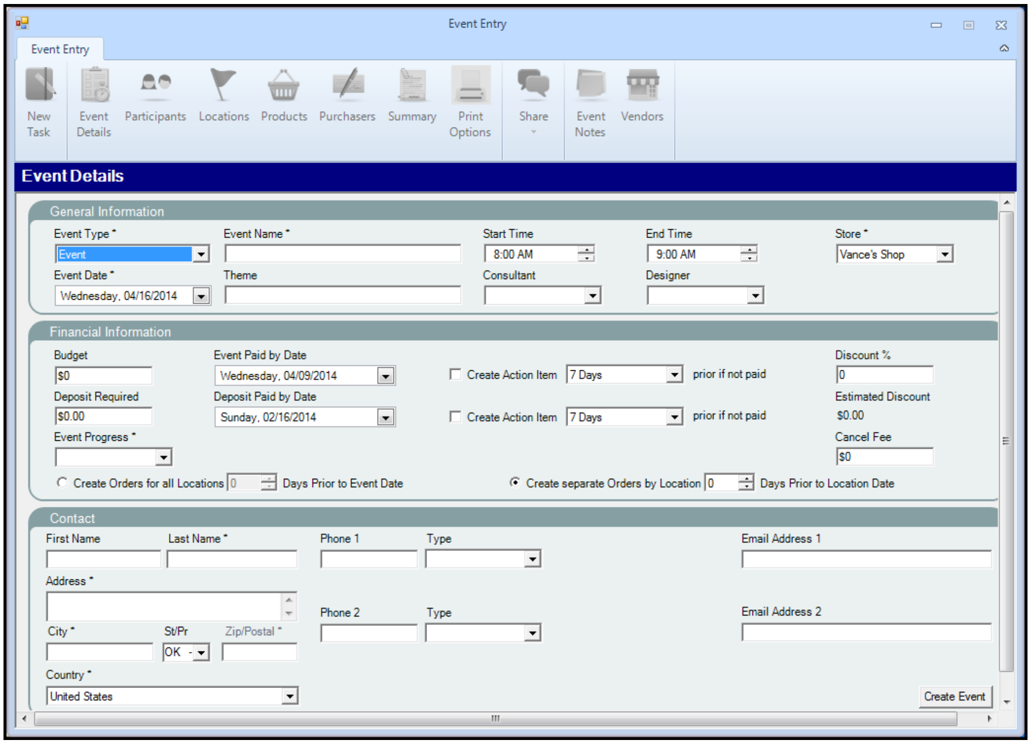
3. Click **Save and Close** if you are complete or **Save and New** if there are additional consultations to add.
    - Click **Close** to exit without saving.

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.



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 Event Progresses.

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**
- **End Time**
- **Store***

- **Event Date***
- **Theme**
- **Consultant**
- **Designer**

3. Enter *Financial Information* in the fields provided:
    - **Budget**
    - **Event Paid by Date**
    - **Event Paid by Action Item Reminder** checkbox
    - **Discount %**
    - **Deposit Required**
    - **Deposit Paid by Date**
    - **Deposit Paid by Action Item Reminder** checkbox
    - **Event Progress***
    - **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.

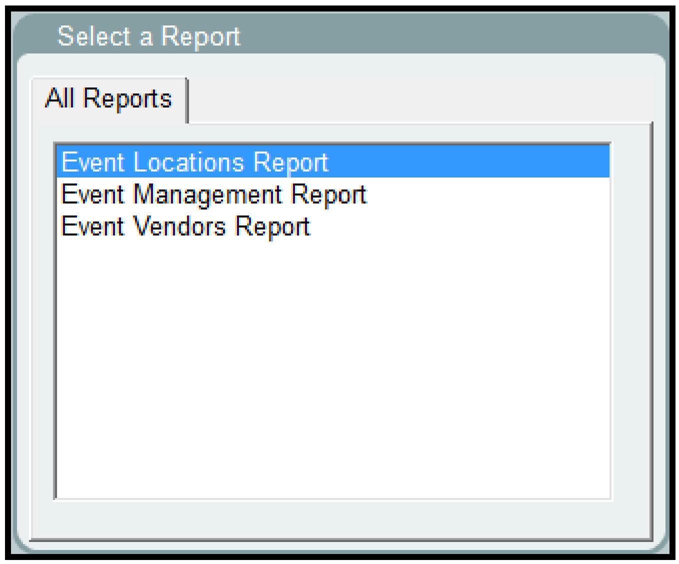
- **First Name**
- **Last Name***
- **Address***
- **City***
- **St/Pr**
- **Zip/Postal***
- **Country***
- **Phone Number**
- **Type**

- **Alternate Phone Number**
- **Alternate Phone Type**
- **Email Address**
- **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:

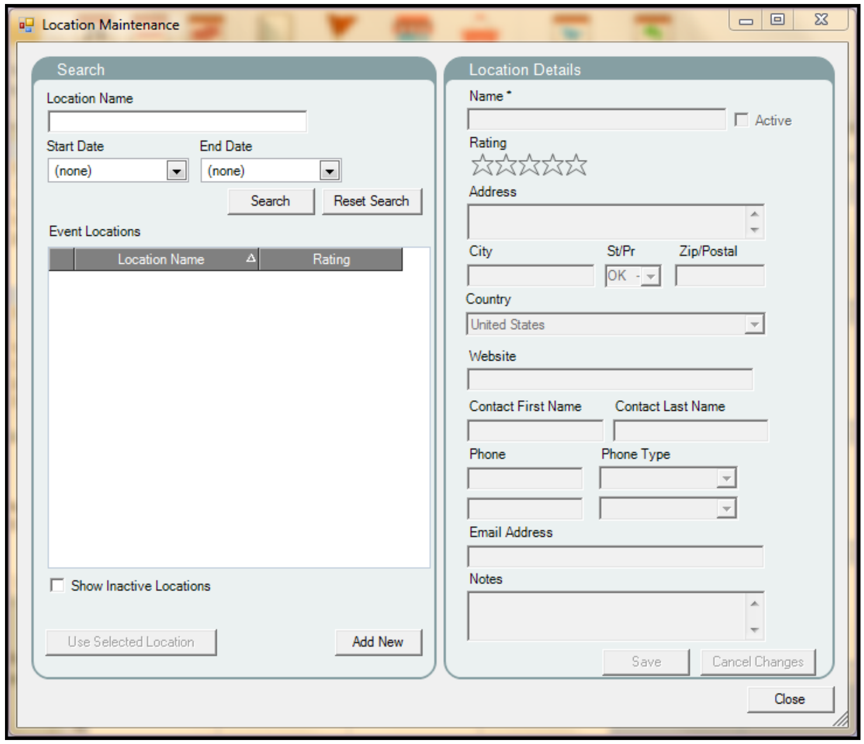
Event Locations Report – The Event Locations report contains information summarizing events based upon the event count and dollar amounts spent at each location.

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.

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

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

Temporary Locations can be added during the Event Entry process by 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.

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

- **Country**
- **Website**
- **Contact First Name**
- **Contact Last Name**
- **Phone**
- **Phone Type**
- **Alternate Phone**
- **Alternate Phone Type**
- **Email Address**
- **Notes**

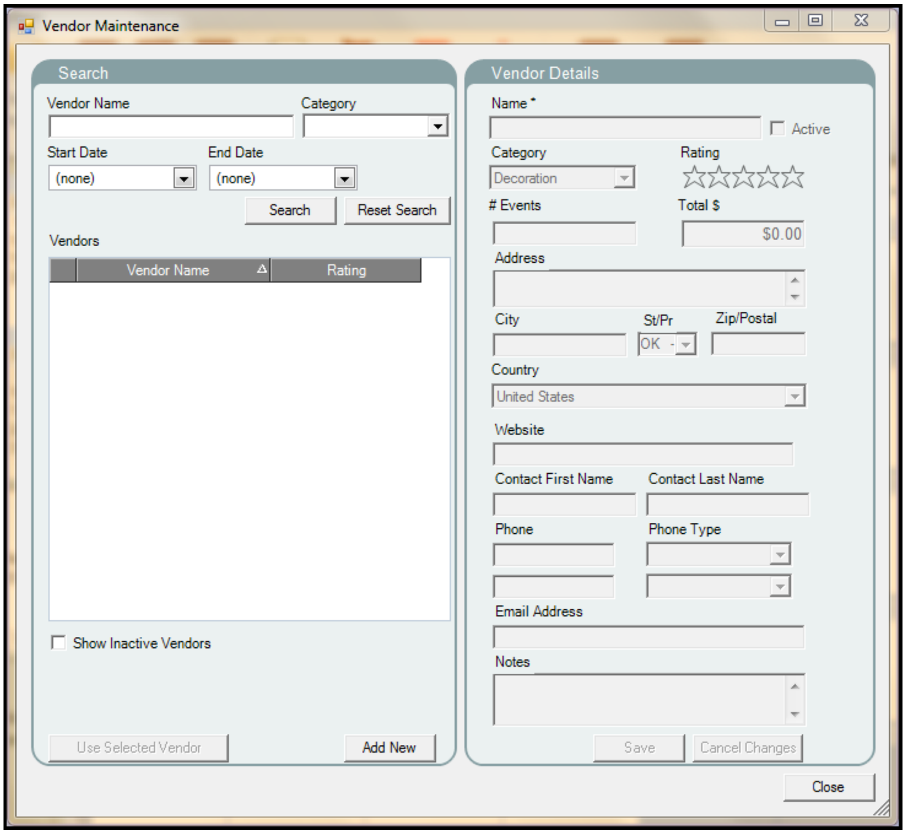
4. Once all information has been entered, click **Save**.
    - If you want to cancel without making any changes, click **Cancel Changes**.
5. Press **Close** to exit the *Location Maintenance* window.

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.
    - 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.



1. 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.

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

- **St/Pr**
- **Zip/Postal**
- **Country**
- **Website**
- **Contact First Name**
- **Contact Last Name**
- **Phone**
- **Phone Type**
- **Alternate Phone**
- **Alternate Phone Type**
- **Email Address**
- **Notes**

4. Once all information has been entered, click **Save**.
   - 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.
   - 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.

2. Enter all necessary **Criteria** in to the *Search* pane.

3. Click **Search**.

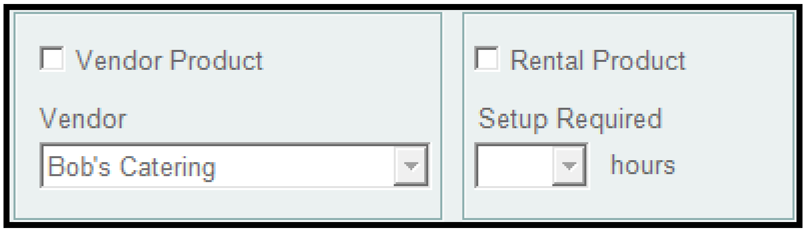
4. Select the **Vendor**.

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.



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**.

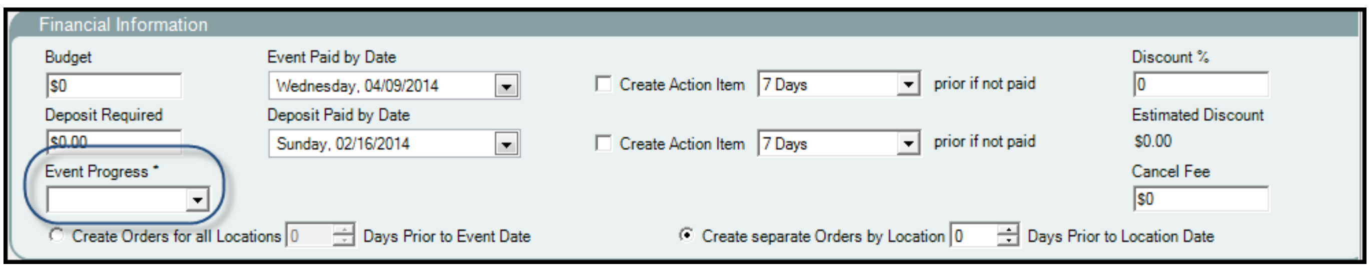
Updating an Event

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.



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:

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

- **Phone Type**
- **Alternate Phone Number**
- **Alternate Phone Type**
- **Notes**
- **Function Date**
- **Start Time**
- **End Time**
- **Delivery Date**
- **Delivery Time**

3. Once all the information has been added, click **Add New** to add the location.
    - 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.

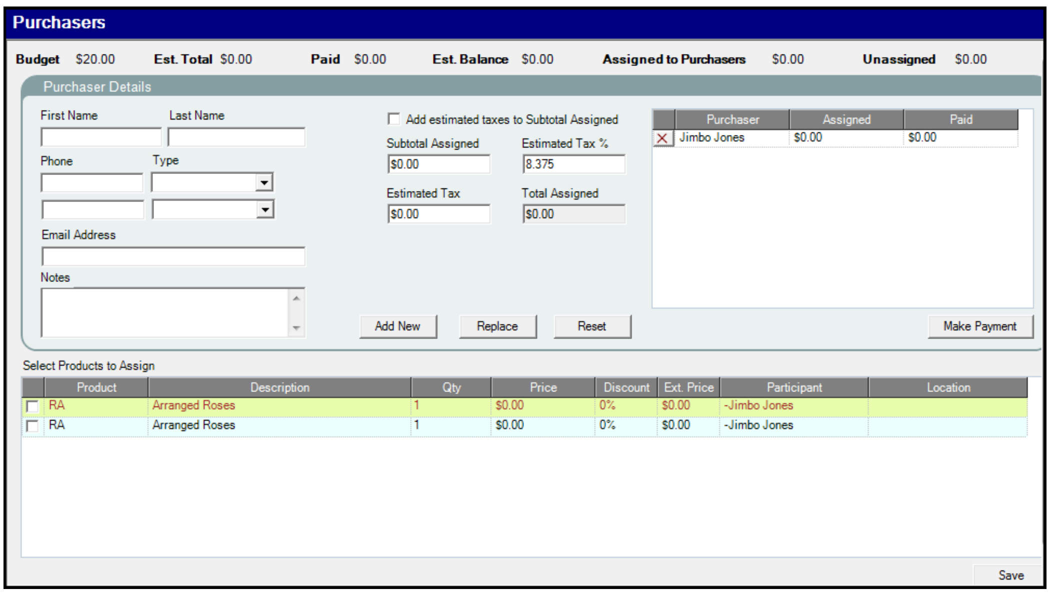
10. Click **Save**.

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:

   - **First Name**
   - **Last Name**
   - **Phone Number**
   - **Phone Type**
   - **Alternate Phone Number**
   - **Alternate Phone Type**
   - **Email Address**

- **Notes**
- **Add estimated taxes to Subtotal Assigned** checkbox
- **Subtotal Assigned**
- **Estimated Tax %**
- **Estimated Tax**
- **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**

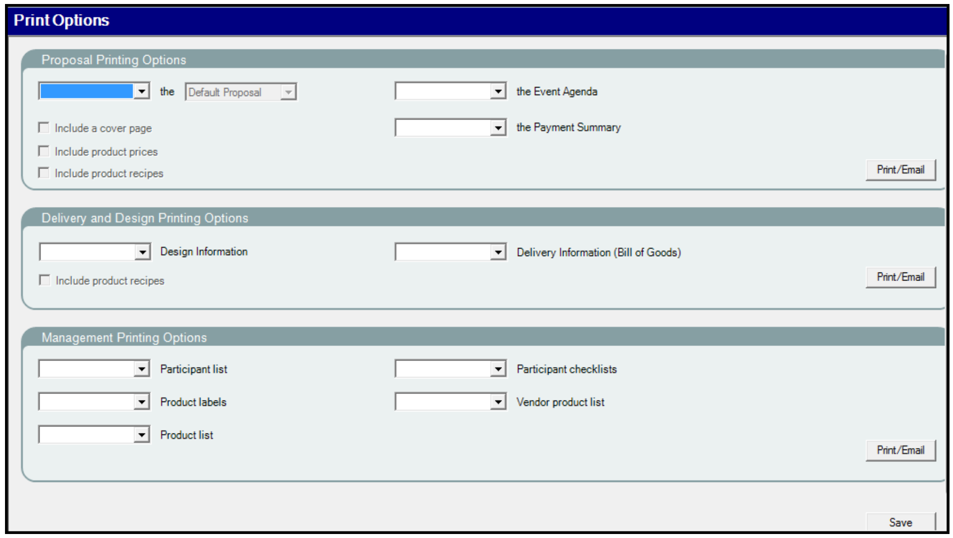
The page will also include all the currently listed **Purchasers** and their information regarding any payments that they have made. All this information can be printed from the *Print Options* page.

Print Options

Before you can email any information on this page, the Email Account Setup 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)**.

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 drop-down 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**.
    - 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, click here.

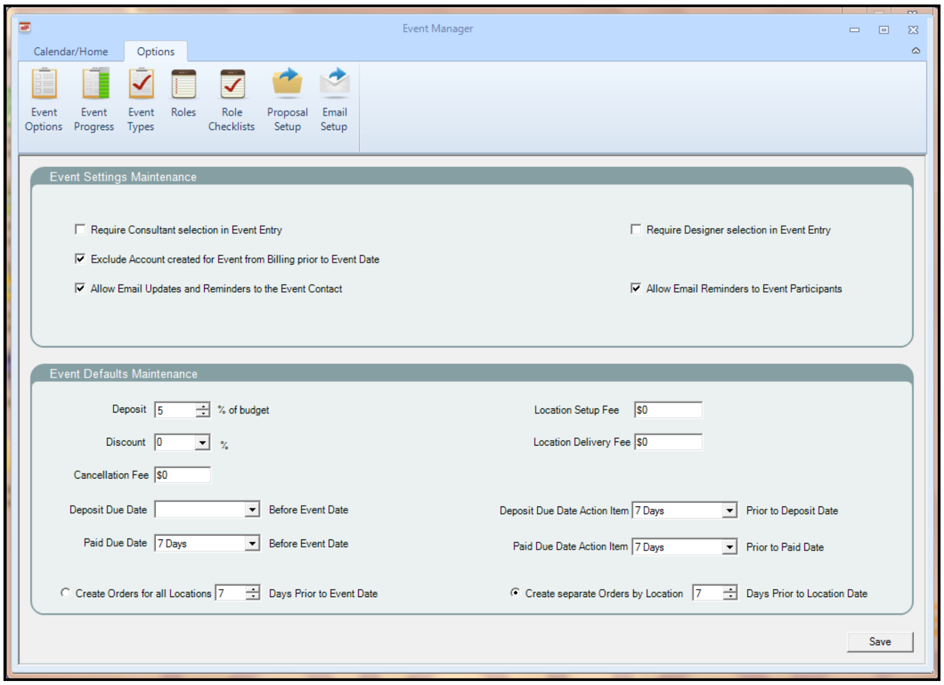
Event Manager Options

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.

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.

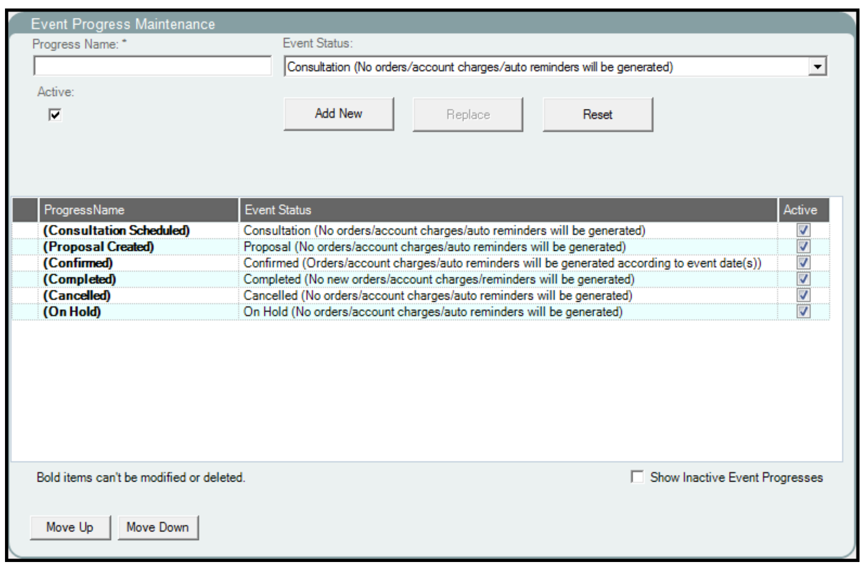
Cancellation Fee – Indicate the default value for an event cancellation fee.

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

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**.

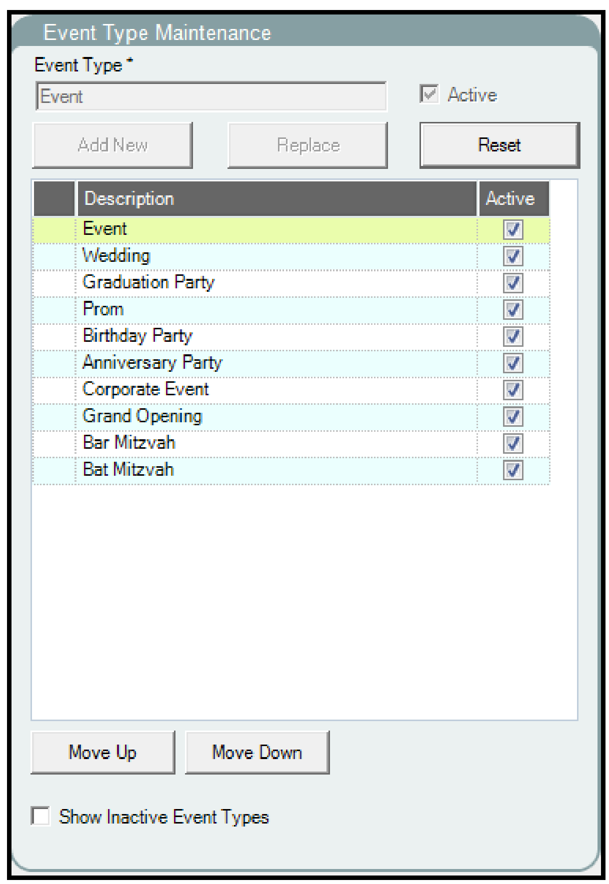
Event Progress Activity

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**.

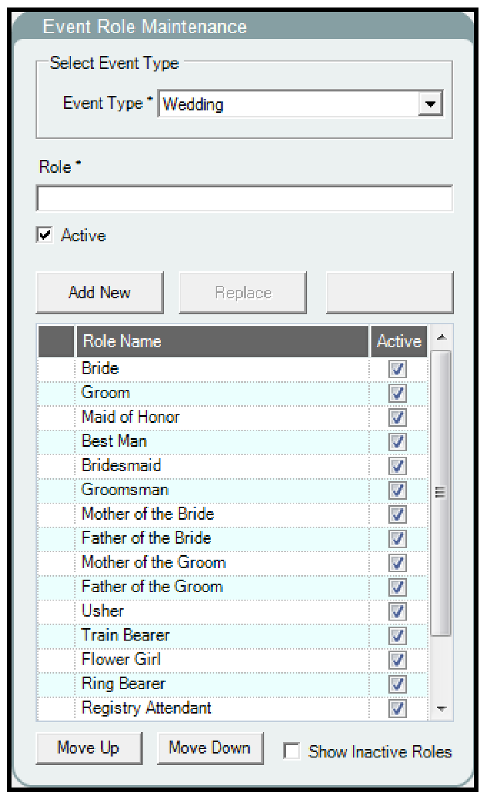
1. To make an *Event Type* Active, select the Event Type.

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.

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**.

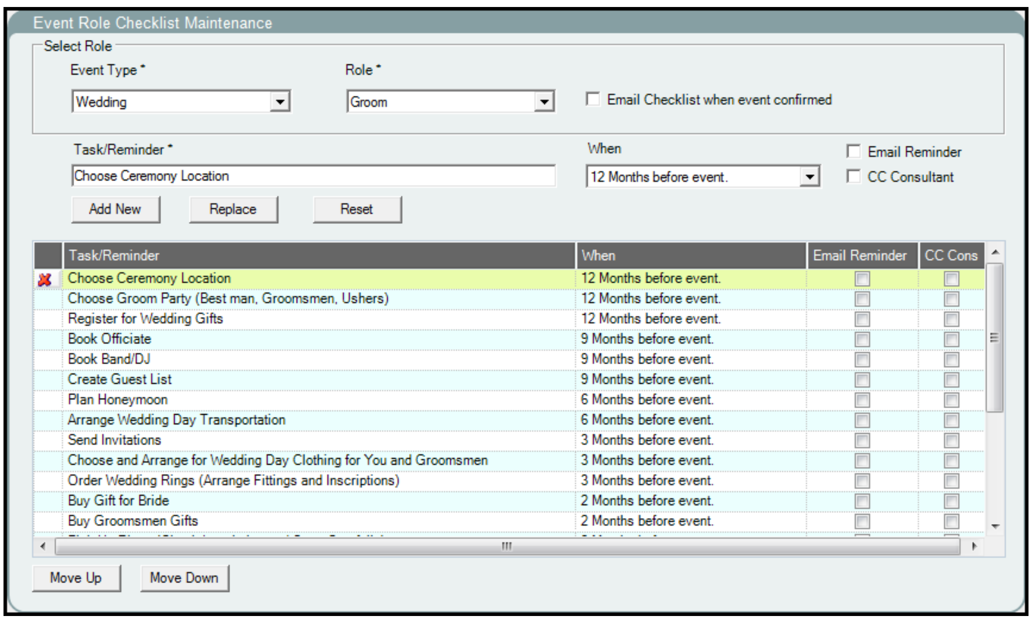
1. To make a *Role* Active, select the **Role**.

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.

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*.
    - 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.

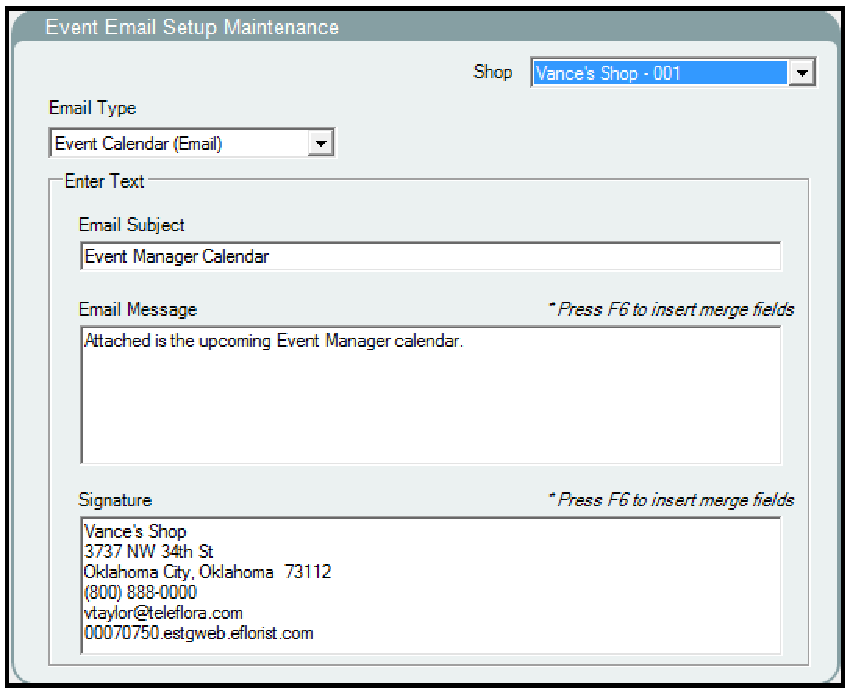
If you are satisfied with your changes, click **Save**.

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.
   - 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**.
3. If necessary, update the information in the following fields:
   - **Email Subject**
   - **Email Message (Limit of 80 characters)**
   - **Signature**
4. Click **Save**.