

Booking Your First Event

Class Syllabus

Topics covered:

- I. Event Manager Introduction
 - A. Viewing the Event Display
 - B. Viewing the Sub-Event Display
 - C. Building a Menu
 - 1. Retrieving Menu Items from Default Menus
 - 2. Adding a Custom Menu Item to an Event
- II. Using the Event Wizard
 - A. Step 1: Selecting a Client
 - 1. Searching for an Existing Client by Name
 - 2. Using the Account Finder Tool
 - 3. Adding a New Client
 - B. Step 2: Entering Event Details
 - C. Step 3: Entering Menu Details
- III. E-Mailing an Event Contract
- IV. Adding Payments to an Event
 - A. Adding an Event Payment
 - B. Editing an Existing Event Payment
- V. Adding Staffing and Comments To an Event
 - A. Adding and Managing Staffing
 - B. Managing Event Shifts
 - C. Customizing the Shift and Employee Grids
 - D. Copying Event Comments from the Scratch Pad
- VI. Appendix: Available Fields
 - A. Fields Available in Account Manager
 - B. Fields Available on the Events Display
 - C. Fields Available in the Staffing Grids
- VII. Q & A