Club Office
Event Manager

DPH @ Event Manager

File   Screen Capture   Reports   Info   Help

| New Event | Event Info | Lookup | Calendar | Item Detail | Clear Screen | Modify | Save | Bill Event | Cancel Event | Contract Builder | Exit |

Reservations Calendar

Active Year
2017
Change Year
← →

Active Month
May
Change Month
← →

● Calendar View
○ List View

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5 * 1 event * Twilight Event	6
	7	8	9 * 2 events * Retirement Party Planning Meeting	10	11 * 1 event * Todd Smith-Hannah Johnson Wedding	12 * 1 event * Twilight Event	13 * 1 event * Golf Committee Meeting
	14 * 1 event * Sunday Brunch	15 * 1 event * Outside Event	16	17 * 3 events * Board meeting Graduation Planning Party Private Party	18 * 1 event * Card club	19 * 1 event * Twilight Event	20 * 1 event * House Committee Meeting
	21 * 1 event * Sunday Brunch	22	23 * 1 event * Brian Thomas Retirement Event	24	25 * 1 event * Card club	26 * 1 event * Twilight Event	27
	28 * 1 event * Sunday Brunch	29	30 * 1 event * Planning Meeting	31			

Show All Rooms

Show All Times

Redisplay Calendar

Version 17.05.03a

Table of Contents

READ ME FIRST

Suggested 14-Step Implementation Overview

1. Begin with a fully-functional and implemented Club Office system. The proper G/L accounts, service charge percentages, minimums, sales taxes, inventory items, etc. all need to be in place before it makes sense to being working with Event Manager. Resist the temptation to install and start using it before your system is ready for it -- Event Manager is *totally* dependent on all the other Club Office modules being configured and working properly.

2. Complete the Implementation Questionnaire and use your answers to help define operating policies and procedures, which will then guide you in making the right setup choices for Event Manager. Event Manager is a reservations system – it's very hard to go "back" if you've put the system into operation after having made poor design choices at the start.

3. Install the software AFTER you've made your plans. Understand that if you reinstall the software at a later date, the reinstallation will replace your Event Manager calendar with a blank system database, effectively deleting all events.

4. Initialize the Event Manager system for the current year and next year. Set the hours configuration settings that match the hours your facility is open for business or at least the hours between which employees will be working and event reservations can be made.

5. Add the rooms. Create the most frequently used rooms first. Notice the illustration on pages 11-12. The first room that you create will display in the leftmost column when viewing the calendar in list view mode, and also at the top of the selection list when you assign a room to an event.

6. Make a backup of the EVNT.MDB database. This database contains Event Manager calendars, rooms, event items, and other things and having a backup that has only reservation dates, times and rooms but no other data can help you get back to square one if you need to start over.

7. Add any additional inventory items that you may need. Depending on your preferences, the items could be generic (i.e. "mixed drink") or specific ("brandy Manhattan"). The quantity of items that you need to add will largely be based on pricing and service charge considerations or on revenue recognition within your accounting system. You may decide to add several new G/L accounts as well to segregate your event business from your normal, day-to-do member sales. Whatever you decide, do it BEFORE you put Event Manager into real operation.

8. Add department buttons as needed for the items that are likely to be sold to an event.

9. Complete the main configuration screen for Event Manager. The screen is available inside the main Club Office configuration module.

10. Create several sample events. Use the test events to determine if the correct hours are being displayed (a changeable configuration setting) and the correct rooms. Experiment with several test event scenarios to practice using your event procedures to see where Event Manager is most helpful.

11. Follow the steps that you would normally use to present an invoice/bill to an event customer.

12. Be sure to clear out any charges Event Manager may create inside the A/R system for these test events so that it doesn't affect your accounting system.

13. Finalize your Event Management procedures, *write them down* and publish them in a 3-ring "Event Procedures Manual." You may want to design a few checklists of your own and attach them to the insides of file folders for each event you conduct.

14. Train your personnel in using your documented procedures to make sure that everyone works in a consistent fashion. As new procedures develop, be sure to document them and include them in your Event Procedures Manual, and of course, train all staff in the new procedures as well.

Implementation Questionnaire

Addressing the following concepts will help you make the most of your Event Manager system.

1. **Do you price food and/or beverage items the same for regular member sales as you do for contracted events?** If the answer is NO, then you'll likely need separate pricing for all the items that will be used for contracted events. The alternate retail price field (built into every inventory item) may work for you as-is.

2. **Do you use *exactly* the same food and/or beverage items for contracted events that are on your normal dining menus?** If the answer is NO, you should create separate departments in your inventory module to contain items that are specifically for events; this is especially true if you have special items that are available *only* to contracted events.

3. **Are your service charge percentages the same for member purchases as they are for contracted events?** If the answer is NO, you'll either need to turn Event Manager's S/C setting OFF when adding item detail to the event, followed by a flat service charge value when the event is finished or, you'll need a separate set of A/R sales accounts for all the event items so that the service charges are calculated correctly. In addition, you'll need a separate set of event-only inventory items that use those A/R sales accounts for posting sales figures.

4. **Do you have SQLPos Point of Sale and need to track individual inventory item movement from event sales as well as normal member sales?** If the answer is YES, you may consider establishing a set of inventory items and matching panels of event-only buttons to quote and sell your events directly through the SQLPos POS system. By design, SQLPos creates inventory transactions that interact with the running inventory quantity totals inside the inventory system whereas Event Manager interacts only with the A/R sales system.

5. **Do you "pool tips" when multiple servers are working a banquet or party and divide the total later between those employees?** If the answer is YES (even if you don't divide them equally among all employees involved), then you'll want to create an employee called "Tip Pool" and credit "Tip Pool" with the sale of the event. Later when you run the service charge worksheet in the payroll manager, the "Tip Pool" employee will show the total service charges that should more properly be reallocated to the actual servers when the payroll values are keyed into payroll manager. Alternately, and if you want to be more granular and actually show service charge transactions to the correct employees from within the A/R system as well, you could use one of the convenience member accounts to enter manual tickets through the A/R system by crediting the convenience account for the "Tip Pool" employee to the service charge G/L account for the full amount of the party tips and keying offsetting transactions to the same convenience member account yet using the correct employee numbers. While this is a bit more work, when the service charge worksheet is run, the correct amounts would already be displayed for the employees: the "Tip Pool" employee would be zero, the distributed amounts would already be allocated to the proper employees through the A/R tickets and reports inside the A/R system will mimic what the payroll system shows.

6. **When you reserve a room for an event, do you also subdivide that room at other times and rent both subdivisions, too?** If the answer is YES, then consider how you will define your "room locations." If the Main Dining Room has a divider and can be divided into two halves, how do you rent/reserve it? Can you have two different functions going on at the same time, one in each half? It makes a difference to Event Manager, because you may want to define the main dining room in three ways: one "room" is the whole dining room, another "room" is the "west half" and yet another "room" is the "east half." Because subdivided rooms can create potential booking conflicts when both the "whole dining room" and one subdivided portion of it are reserved separately, Event Manager can check for possible conflicts for such subdivided rooms. However, understand that the system will not prevent you from double-booking both the whole and the subdivided rooms: Event Manager provides a warning message but ultimately, it's the end-user's decision whether to double-book or not.

7. **What is your policy for billing events?** Is it your policy to present an itemized bill within moments of the conclusion of an event or send/fax/email it the next day? Or do you bill it at the end of the month via statement as part of your normal A/R process? Is your policy the same for member events as it is for non-member events? You will need to be crystal clear on exactly how events are to be billed so that nothing is missed.

8. **How are actual consumed quantities reported?** For example, do you use bottle counts at the end of a wedding or a drink tally sheet, and how will that information be recorded for the event? Will it be rung up through POS to the event account, or by a manual ticket to be keyed into the A/R system, or will it be added to the event via the Item Detail screen? Decide on a method, write it down and stick to it.

9. **Who will be given access to the Event Manager?** Club Office includes a multi-level permissions system to allow/prevent users from gaining access to the various modules, as well as limiting or allowing what they can do inside the modules if they can indeed access them. Remember that administrator mode can be a double-edged sword: it gives a user carte blanche access to the system but if used carelessly, a user can get herself into trouble.

Event Manager Design Concept

The Club Office Event Manager is a calendar-based activity scheduling tool that is an integrated add-on module to the Club Office suite. Event reservations may be made in 15-minute increments for any day and any time of a currently active year for up to twenty "locations," which are akin to calling the locations "rooms." Functions are built in to create and manage the database of dates and years as well as location/room names and capacities, to copy reservations and their setups to different dates, linking multiple events together as "packages," print event contracts, operating sheets, inventory forecasts, create revenue projections and perform event promotions. It's a helpful tool for managing events all the way from the initial contact to finishing and billing the event through the Club Office A/R system.

Event Manager is not designed to manage golf starting times, golf car or sleeping room reservations or scheduling labor, although with some creativity, it could serve as a form of a personal appointment book or court reservations system for a small tennis or other facility that uses a similar reservations concept.

System Requirements

Event Manager relies on a working Club Office system and resides in the same directory/folder as the main Club Office system and database files. The hardware requirements are identical to those required for Club Office.

License

Event Manager is provided with a system license as an add-on to a pre-existing Club Office accounting system for as many workstations as the respective Club Office system uses. The license applies only to a single Club Office system; if multiple systems reside at the facility and the end user desires Event Manager for each system, each system must have its own Event Manager license.

Installation

Event Manager requires a serial number for installation; it is provided with your copy of the software. You will also need the serial number for installing any Event Manager updates at a later date. The software should be installed into the same location as your existing Club Office system. There are no additional DLLs, Windows components or Windows menu options that are installed or created. Accessing Event Manager is via the normal Club Office menu; a new button will appear on the menu screen if Event Manager is installed.

System Configuration

Configuring Event Manager takes place in two locations: the main Club Office configuration and secondarily, a few places inside Event Manager itself. First, consider the main configuration screen settings:
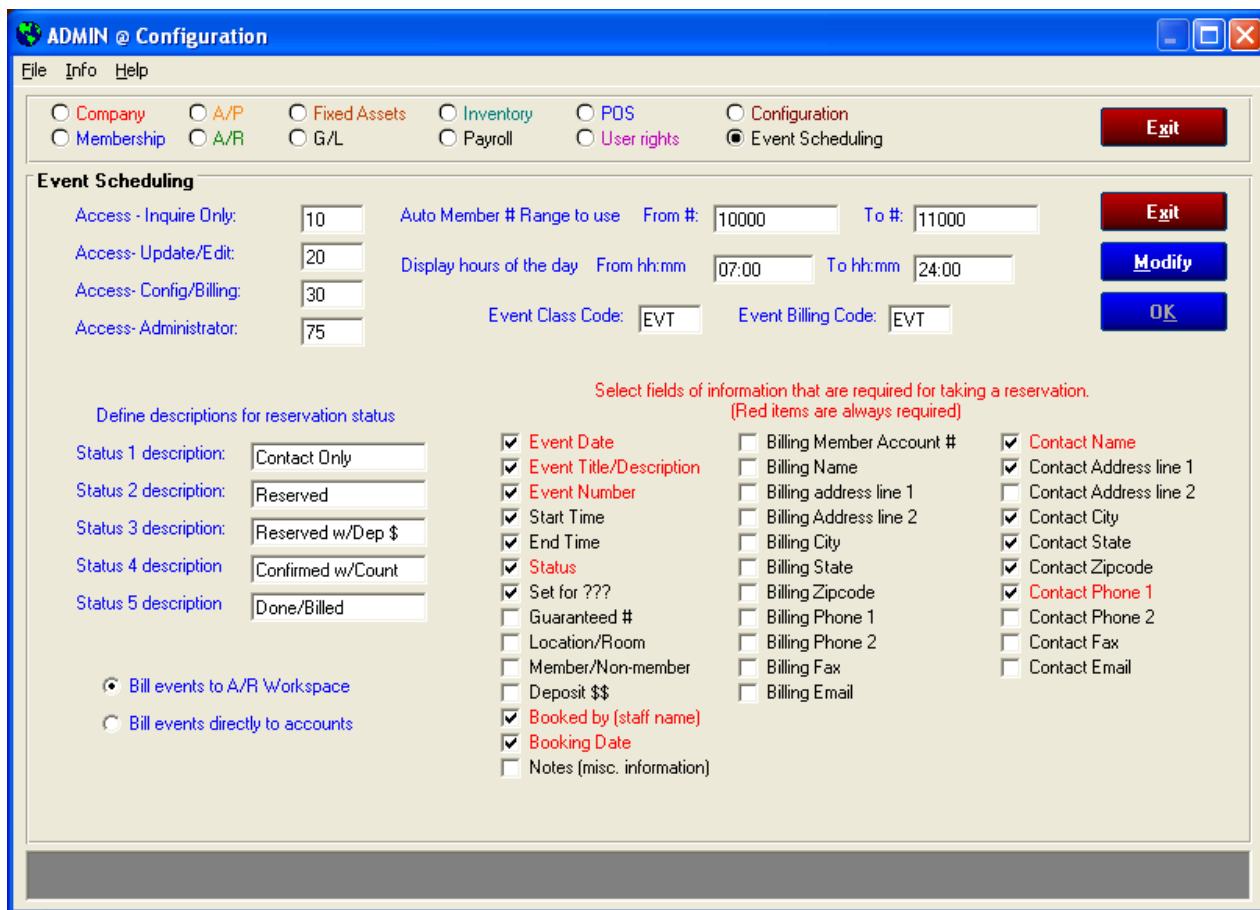
The main configuration screen is one of the available panels of information in the main Club Office system configuration area. Available configuration options are:

- **Access levels**
  - Apply suitable user access levels for allowing users to view scheduling data and for changing and billing it, as well as for administrator maintenance functions.
  - In the example above, a Club Office user whose access level setting for Event Manager is less than 10 cannot use Event Manager at all. Additionally, the user must have at least level 20 to be able to add/change reservation information, at least level 30 to be able to "bill" the event and at least level 75 to perform administrative functions. The access levels you set depend on who you want to have access to the module, the security settings you devise and the individual access levels you award users in the EVT column of the main configuration module's User Rights section.

- **Auto Member # Range to Use**
  - Select the range of member account numbers that has been designated for event accounts. These settings are necessary for the event system to be able to automatically create appropriate billing accounts inside the A/R system for outside or other non-member events that are not linked to existing member or internal club accounts. The system looks to this setting to determine the next member account number to use for the event.

- o In the example above, the user has chosen to locate events between the 10000-11000 member number range when the event is not linked to an already-existing member account. Note that for internal events such as board and committee meetings or other club functions, it's likely that accounts such as "Board of Directors," "Golf Committee," "Social Committee," etc. already exist and events planned by those groups can easily be linked to them. The member number range is intended to be used more for outside, non-member events than for internal, member-driven activities.

- **Display hours of the day**
  - o By default, when a system is initialized, reservation time slots are created every fifteen minutes beginning immediately after midnight until midnight of the same day (24 hours of time slots). In 24-hour format (HH:MM), type the range of times during the day when reservations are to be allowed. The system will not display times outside the range you set. Note that changing this to a smaller or different range of times may render some existing reservations invisible to the system.
  - o In the example above, the user has specified that no reservations can be made before the hour of 7:00 a.m. or later than midnight. (When scheduling an event, it is possible to specify that the "end" time of an event be past midnight, using the "CLOSE" option. More information is included later in this manual.)

- **Event Class Code**
  - o Select the class code that has been designated only for the event system. Press F-5 for a lookup screen. A class code is necessary for the event system to be able to automatically create appropriate billing accounts in the A/R system for events that are not linked to existing member or internal club accounts. The class code you select for events should be unique to events only and not used for regular member accounts. Suggested: EVT unless that code is already being used.
  - o In the example above, the user has chosen to use class code "EVT." When it is necessary to create a new billing account, the system will use this class code when it creates the billing account inside the membership database. (Note that the EVT class code must already exist before configuring Event Manager to use it.)

- **Event Billing Code**
  - o Select the billing code that has been designated for event accounts. Press F-5 for a lookup screen. A billing code is necessary for the event system to be able to automatically create appropriate billing accounts in the A/R system. Suggested: EVT unless that code is already being used. All monthly values for this billing code should be zero.
  - o In the example above, the user chose class code EVT. (Note that the EVT billing code must already exist before configuring Event Manager to use it.)

- **Define descriptions for reservation status**
  - o Event Manager has five status values that mark the various stages of an event. The defaults are displayed. The higher the status, the more requirements must be met to save the record. You may change the text of the status descriptions but the status values themselves are fixed by the system. Note that status 1 contact only events are just that -- contact names and possible events that do not have dates, times or rooms actually reserved in the event calendar. Statuses 2 through 5 apply to actual reserved events on the calendar. An additional system status applies to cancelled events and is not user-changeable.
  - o In the above example, the user has kept the default settings.

- **Bill Events to A/R Workspace or Bill events directly to accounts**
  - o Event Manager can be used to generate charge transactions to the designated member/billing account number for the event being billed. This setting determines how you want to work with those charges inside the A/R system. The benefit of using the workspace is that event charges can be double-checked prior to committing them

to the account. This is the suggested setting. The benefit of billing direct is that an event manager who also has access to the membership module but not the A/R system can generate a statement directly from within the membership manager for an event just completed. However, this method bypasses the approval mechanism built into the A/R system and may not be a good choice for your operation.

- o In the example above, the user has chosen to use the suggested workspace mode.

- **Select fields of information that are required**
  - o By default, the system has specific data requirements for the various status levels. The minimum data required by Event Manager is highlighted as red options and applies to status 1, contact only events. When the status is changed, the level of information required changes too. For example, changing a status 2 event to an event with a deposit requires billing information and a deposit amount. You may not choose less data than the system requires although you may wish to require more than the minimum required by the system by checking the appropriate boxes.

  - o In the example above, the user has added the start and end times, the contact address line 1, city, state and zip as a requirement for saving any event, which includes status 1 contact events only.

Event Manager Configuration Options – Inside Event Manager itself

A new Event Manager installation includes a database structure for making reservations but no time slots for taking them. To begin, some basic set up is necessary. Configuring Event Manager requires a user access level at least equal to the "Access - config/billing" setting used at the main configuration screen.
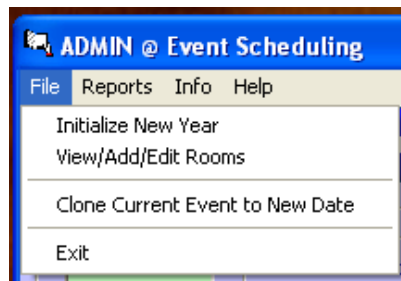
- **Initialize New Year:** This option creates the calendar of dates and time slots that the system will use and it must be performed first. Choosing this option opens a box for entering the 4-digit calendar year, such as 2007, 2008, etc., then click OK. Wait a few moments for Event Manager to initialize the database for the chosen year – the helpwindow at the bottom of the screen will display "Year initialization complete" when finished. Event Manager will not let you re-initialize the same year twice.

- **View/Add/Edit Rooms:** Because a reservation requires a date, a time *and a location*, after initializing a year, you must create at least one "room location" to contain the reservations themselves. Some important considerations:
  - o The calendar has two viewing modes: a calendar mode and a list mode. In list mode, the user can see the first five rooms without having to use the scroll bar to scroll to the screen to the right to see more rooms. Therefore, we suggest that you rank your facility's rooms starting with the most requested down to the least, and use the ranking list to determine the order of rooms to create, their names and capacities.

  - o **A room cannot be deleted once it has been created**. If deletion were allowed, it would also delete all reservation data (past, present and future) that applied to that room. You may, however, rename a room and change its capacity. IMPORTANT: RENAMING A ROOM DOES NOT CAUSE THE RESERVATIONS THAT WERE ORIGINALLY LINKED TO THAT ROOM NUMBER TO FOLLOW TO THE NEW ROOM HAVING THE SAME NAME. *In other words, reservations are linked to the system room number and not the room name.* If you can call room#1 the dining room and room#2 the grill but if you switch the names of the rooms so that room#1 is now the grill and room#2 is the dining room, those

who had reservations in the grill before the name change now have reservations in the dining room and those who had reservations in the dining room now have them in the grill.

o Event Manager can accommodate up to twenty room definitions. If you have a large dining room with a removable divider, you may consider defining it three different ways to describe the ways that you reserve it, for example: main dining room, west dining room and east dining room. If you elect to define subdivisions of your rooms in this manner, you must use the SubD setting to link the subdivided rooms back to the main room so that Event Manager is aware of the relationship. If you subdivide rooms in this manner, at the very least, you should create the whole room and its subdivisions in order so that they appear on the screen adjacent to one another.

o **To add a room:**

1. Click the (room name here) box. Type the room name (max: 50 characters)
2. In the Capacity box, type the number of guests that room can accommodate.
3. If the room is a subdivision of another room, in the SubD box, enter the # of the room of which this room is a part.
4. Click the Add Room button.

In the example above, the user has created subdivisions of the main dining room, has created them in ascending order along with a descriptive reference that the subdivisions are part of the Main Dining Room. Note that the SubD settings indicate that rooms 2 and 3 are SubDivisions of room #1.

In the list view mode, Event Manager shows the following, making it easy to see if a subdivision reservation would be in conflict with the full main dining room. *However, Event Manager will not prevent the user from also booking the main dining room for the same time, which would obviously create an operating conflict.*

ResDate	ResTime	Rm1 - Main Dining Room - cap:150	Rm2 - West Dining Room (Part of MDR) -	Rm3 - East Dining room (Part of MDR) -
20070925	15:45			
20070925	16:00			
20070925	16:15			
20070925	16:30			
20070925	16:45			
20070925	17:00		Smith Wedding	
20070925	17:15		Smith Wedding	
20070925	17:30		Smith Wedding	
20070925	17:45		Smith Wedding	
20070925	18:00		Smith Wedding	
20070925	18:15		Smith Wedding	
20070925	18:30		Smith Wedding	

- **To EDIT/Change a room name or capacity:**
    1. Select the **View/Add/Edit Rooms** option from the file menu.
    2. Double-click the room you wish to change on the list.
    3. Retype the room name and/or change the room capacity.
    4. Click the **Save Changes** button to finish the change.

- **Room Subdivisions/Room Scheduling Conflicts** – Sometimes a large room can be partitioned into multiple, smaller rooms and each scheduled independently. However, scheduling conflicts can occur when the "main" room that contains all the subdivided parts is scheduled at the same time that one of its subdivided rooms is in use. In the example below, the SubD settings for the "West Dining Room" (room #2) and "East Dining Room" (room #3) are set to 1 to show that they are parts of room #1, the "Main Dining Room." This links the two sub-divided rooms to the main room and makes Event Manager aware of all three rooms when making reservations for any of them. (Note that the main room SubD setting remains zero – only the subdivided rooms use the SubD setting of the room number of which they are a part.)

#	Room Name/Title	Capacity	SubD
2	West Dining room (Part of MDR)	70	1
1	Main Dining Room	150	0
2	West Dining room (Part of MDR)	70	1
3	East Dining Room (Part of MDR)	70	1

If Event Manager senses that a scheduling conflict may occur between the three linked rooms, a warning message appears on the screen when the "Save" button is clicked. The option to cancel is provided as well as the option to save the event anyway. Event Manager includes an Event/Room Conflict report to help identify potential room scheduling conflicts.

** Room Conflict? **

? Caution - a possible conflict with room # 1 exists with this reservation. Click YES to make the reservation anyway; click NO to exit.

[Yes]   [No]

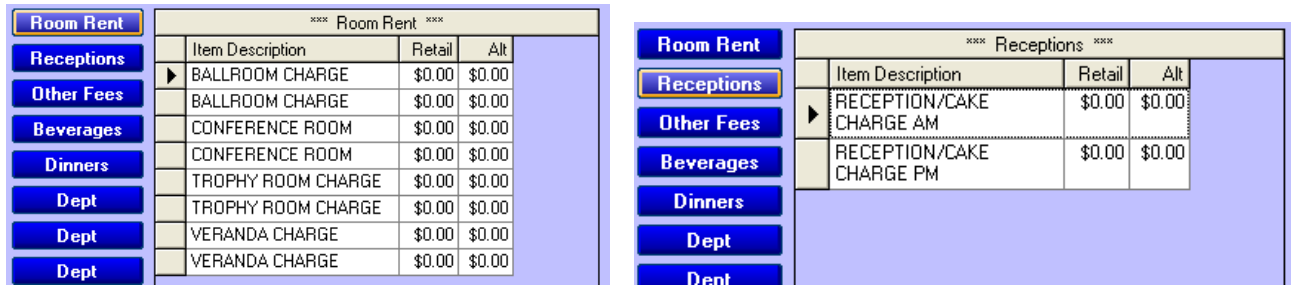- **Create Department Buttons.** Select the **Item Detail** button at the top of the screen to display the detailed items screen. Before any events are defined, this screen is a bit austere – normally you'd see the event number and name in their respective boxes. However, a user with at least configuration access can view the screen directly so as to configure the sixteen department buttons at the far left side of the screen.
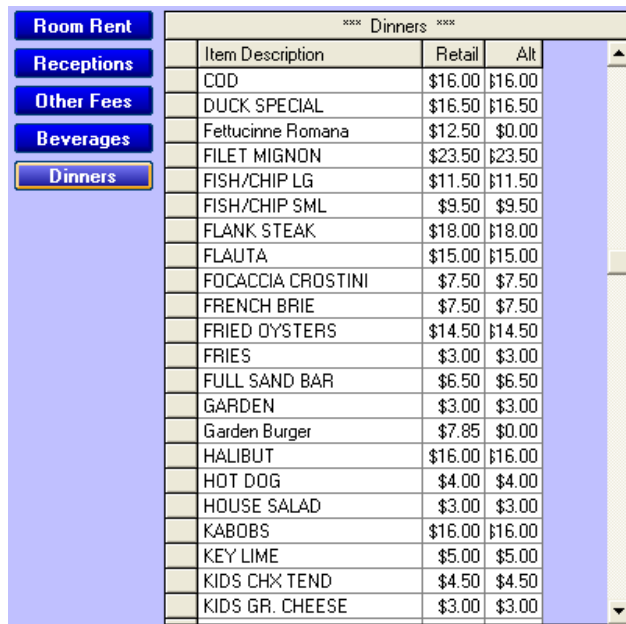
o The Item Detail screen is used to link (i.e. "sell") the appropriate detailed items to an event. To make the screen easy to use, it's important to configure it so that it can display the lists of available items so that they can "sold" to the event.

o Event Manager's sixteen department buttons point to selected inventory departments as they have been defined when inventory items were entered into the inventory module. (Note: this manual assumes the user has a working Club Office system and therefore, the topic of entering inventory will not be addressed here. However, prior to configuring Event Manager's buttons, it may be helpful to have a list of the inventory departments currently available in the inventory system. This report is available in the inventory module itself.)

o Click FILE – Configure Dept Buttons to open the button configuration panel. Then select the top Dept button. A display similar to the following one will appear:

o In the "Button Caption" box, type the text you want to see on the button itself, the name of the inventory department in the other box and click Save Settings. In this example, the user has set the caption to "Room Rent" and when clicked, the button is supposed to display all items in the RRENT inventory department:

o After configuring item detail buttons, the user can simply select a button to review the inventory in those respective departments. A couple examples:

Room Rent			
Receptions	*** Room Rent ***		
Other Fees	Item Description	Retail	Alt
Beverages	▶ BALLROOM CHARGE	$0.00	$0.00
Dinners	BALLROOM CHARGE	$0.00	$0.00
Dept	CONFERENCE ROOM	$0.00	$0.00
Dept	CONFERENCE ROOM	$0.00	$0.00
Dept	TROPHY ROOM CHARGE	$0.00	$0.00
	TROPHY ROOM CHARGE	$0.00	$0.00
	VERANDA CHARGE	$0.00	$0.00
	VERANDA CHARGE	$0.00	$0.00

Room Rent	*** Receptions ***		
Receptions	Item Description	Retail	Alt
Other Fees	▶ RECEPTION/CAKE CHARGE AM	$0.00	$0.00
Beverages	RECEPTION/CAKE CHARGE PM	$0.00	$0.00
Dinners			
Dept			
Dept			

o By deleting a button's caption altogether, unused buttons can be hidden from the display:

Room Rent	*** Dinners ***		
Receptions	Item Description	Retail	Alt
Other Fees	COD	$16.00	$16.00
Beverages	DUCK SPECIAL	$16.50	$16.50
Dinners	Fettucinne Romana	$12.50	$0.00
	FILET MIGNON	$23.50	$23.50
	FISH/CHIP LG	$11.50	$11.50
	FISH/CHIP SML	$9.50	$9.50
	FLANK STEAK	$18.00	$18.00
	FLAUTA	$15.00	$15.00
	FOCACCIA CROSTINI	$7.50	$7.50
	FRENCH BRIE	$7.50	$7.50
	FRIED OYSTERS	$14.50	$14.50
	FRIES	$3.00	$3.00
	FULL SAND BAR	$6.50	$6.50
	GARDEN	$3.00	$3.00
	Garden Burger	$7.85	$0.00
	HALIBUT	$16.00	$16.00
	HOT DOG	$4.00	$4.00
	HOUSE SALAD	$3.00	$3.00
	KABOBS	$16.00	$16.00
	KEY LIME	$5.00	$5.00
	KIDS CHX TEND	$4.50	$4.50
	KIDS GR. CHEESE	$3.00	$3.00

o Button configuration changes can be changed at any later date if you wish.

o It's a good idea to design the buttons in some sort of logical order, likely dependent on the necessary types of fees you charge at your facility. In the above example, the user started with room rental, then other incidental fees and finally the beverage and food items. However, as items are sold to the event they're displayed alphabetically by department name, so that "Beverage" would always appear before "Food" and "Food" before "Room Rent," etc.

• Event Manager is now ready to use in a meaningful fashion, with the only remaining configuration settings being the design of event contracts, contract wording, etc. This will be addressed more completely in the "Contract Builder" section of the manual.

Main Startup Screen

When Event Manager starts up, the calendar for the current month is displayed. The date cell that is shaded in gray is the current date (based on the computer's internal clock date). Scheduled events are displayed in their respective date cells, in the order that they appear on the calendar for each respective date. If more events are scheduled on the same day than will fit inside a date cell, the word "more" may appear in the cell. The default display shows all rooms and all times:
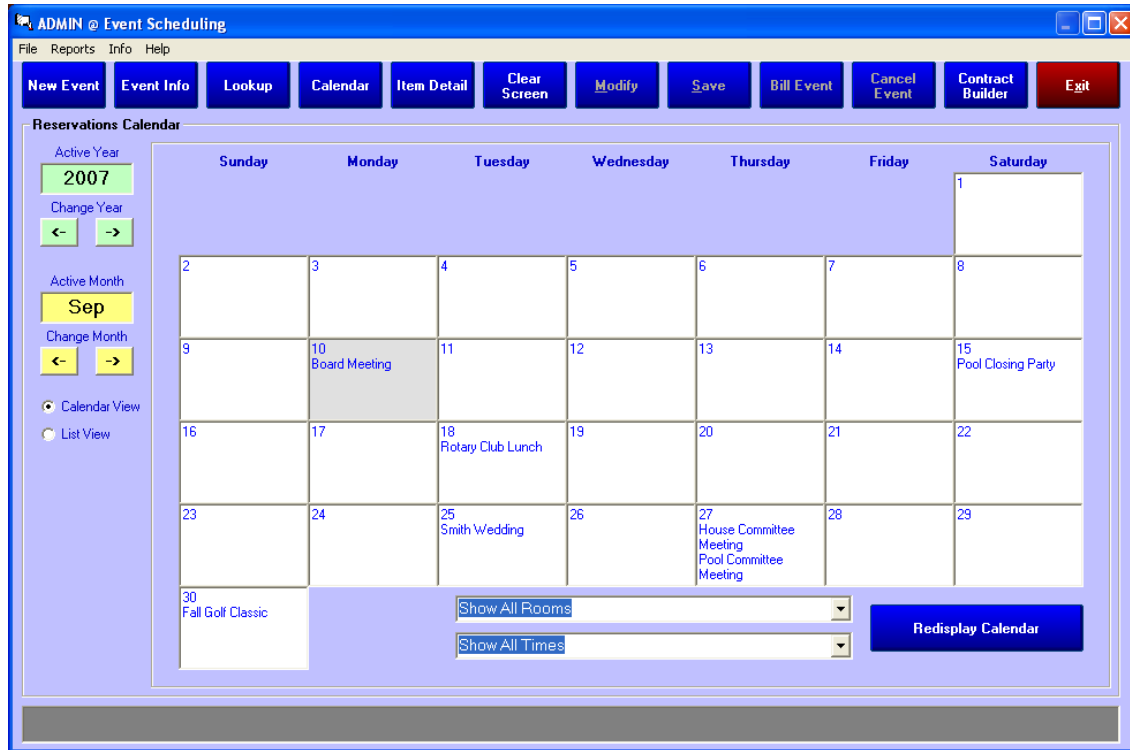
The **"Active Year"** is based on the computer's internal clock and is displayed inside a light green box. The green arrow buttons move forward/backward and change the display from year to year.

The **"Active Month"** is also based on the computer's clock and is displayed in a yellow box. The yellow arrow buttons change the display forward/backward from month to month as related to the current year.

As the month or year is changed, the calendar displays events scheduled for the active year/month combination.

Two radio buttons allow selecting the **"Calendar View"** or **"List View"** and are always related to the active year/month combination; just as the calendar shows all days of the active month, choosing the list view shows all days of the active month, starting with the first day.

When the calendar screen is visible, Event Manager updates itself every minute so that the calendar is always up-to-date. Alternately, the user can always select "Redisplay Calendar" to refresh the calendar manually.

# Using Filters to Change the Calendar Display

You can quickly see a view of all the activity in any single room if a customer says, "I want to use the Grill/Bar for a private dinner party – when is it available this month?" Click on the down arrow of the room selector and choose the Grill/Bar room, then click the time selector arrow and choose "Show Evening Only," then click the now red "Redisplay Calendar" button. Instantly, the calendar displays the monthly activity for the chosen room/time combination:
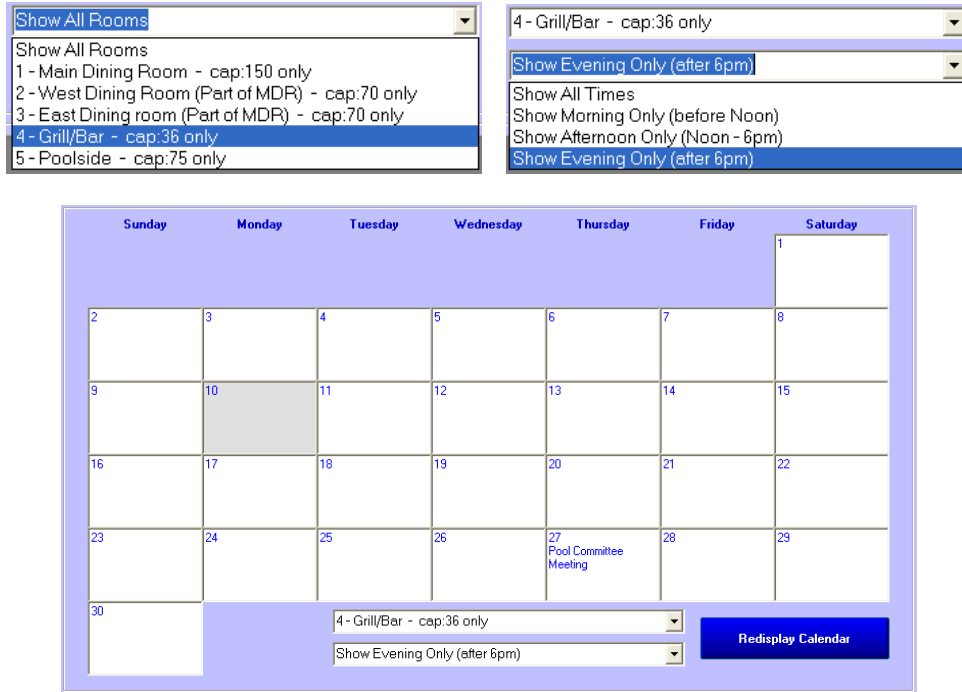
To reset the calendar display to normal, click the Calendar button at the top of the screen.

Seeing the Calendar in List View and Recalling an Event from the List

The calendar display indicates only daily activity, but it's easy to find out more information simply by double-clicking on the date cell: the calendar view switches to list view and displays all activities for that date, the rooms being used and times the rooms are in use. White areas on the list are times when the rooms are not being used:
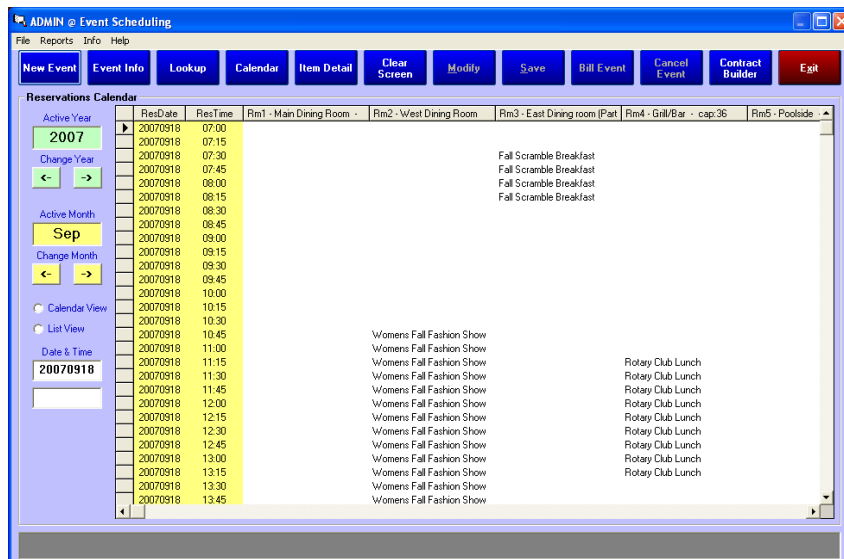
Double-click on the event title in the list view to recall it and display its event detail screen:

Admin @ Event Manager

File   Screen Capture   Reports   Info   Help

| New Event | Event Info | Lookup | Calendar | Item Detail | Clear Screen | Modify | Save | Bill Event | Cancel Event | Contract Builder | Exit |

Event date 20070918   Event # 197   Status 2-Reserved

Event Title Womens Fall Fashion Show

Start time 10:45   Set for ??? 60

End time 14:00   Guarantee 45

Location/room 2 - West Dining Room (Part of MDR) - cap:70

Member/Non-member 1   ● Member   ○ Non-Member   Deposit $$

Booked by ADMIN   Creation date 20070910

Regular Notes
Dressed 6' banquet table in foyer at room entrance. Supply pens, empty cashbox (they will supply $$ and staff for registration table). Ready at 10:00.

Set ten rounds of 6 throughout, water goblets and fall leaf china and matching tableware. Fall flower centerpieces delivered by 9 a.m. by Beston Floral. Tel: 763-224-7387

Internal Notes

Contact Information
Contact Name Karen Thomas

Billing Account Information
Member # 567   [Link to Member #]
Name Karen Thomas
Address 1 3320 Whiffle Road
Address 2
City Minnetonka
State MN
Zip 55319
Phone 1 763-550-2433
Phone 2
Fax
Email karen@whiffleroadassn.org

[Make Contact Info same as Billing Info]

[Create a new multi-event package from this event]   [Link/Unlink to an existing multi-event package]

Once an event has been recalled to the event detail screen, all other functions are available for that event. Click on the Item Detail button to see the individual billable items linked to the event…

ADMIN @ Event Scheduling - Womens Fall Fashion Show - 09/18/2007

File   Info   Help

Detailed Items

Event #	Event Name	Per Person $	SubTotal	S/C	Tax	Total $
197	Womens Fall Fashion Show - 09/18/2007	16.50	615.00	78.75	48.83	742.58

Room Rent	*** Room Rent ***
Receptions	
Other Fees	
Beverages	
Dinners	
Dept	
Dept	
Dept	
Dept	

Item Description	Retail	Alt
▶ BALLROOM CHARGE	$0.00	$0.00
BALLROOM CHARGE	$0.00	$0.00
CONFERENCE ROOM	$0.00	$0.00
CONFERENCE ROOM	$0.00	$0.00
TROPHY ROOM CHARGE	$0.00	$0.00
TROPHY ROOM CHARGE	$0.00	$0.00
VERANDA CHARGE	$0.00	$0.00
VERANDA CHARGE	$0.00	$0.00

[Clear]

Qty

● Retail
○ Alt Retail

☐ FreeForm $$
☐ No S/C

[Add -->]

[<-- Remove]

[Exit]

Selected Items

	Qty	Dept	Description	Ext Price
▶	60	ORBEV	O. J.	$75.00
	60	ORBEV	PERRIER WATER	$90.00
	60	DRDIN	APPLE TART	$135.00
	60	DRDIN	OPEN FOOD DIN	$225.00
	1	OTHEF	STAGE RENTAL	$40.00
	1	RRENT	BALLROOM	$50.00

...or, print a detail sheet for your catering staff from the report menu...

Print Report - Cryprint Window Title evnt01b.rpt - evnt01b.rpt

Exit Options Help

Event Detail Sheet   Date printed: 9/10/2007   Page   1

Event #	Event Title	Date	Start Time	End Time	Room
197	Womens Fall Fashion Show	20070918	10:45	14:00	2 - West Dining Room (Part of MDR) - cap:70

Status: 2   Reserved   Set for: 60   Guaranteed: 46

Billing Information   *Contact Information*

Acct#	Karen Thomas		Karen Thomas	
567.00	3320 Whiffle Road		3320 Whiffle Road	
Deposit:	Minnetonka	MN 55319	Minnetonka	MN 55319
	763-550-1515	Fax	763-550-1515	Fax
	karen@whiffleroadassn.org		karen@whiffleroadassn.org	

Notes: Dressed 6' banquet table in foyer at room entrance. Supply pens, empty cashbox (they will supply $$ and staff for registration table).
Ready at 10:00.

Set ten rounds of 6 throughout, water goblets and fall leaf china and matching tableware. Fall flower centerpieces delivered by 9 a.m.
by Beston Floral. Tel: 763-224-7387

Put 4-segment elevated floor with steps on both ends along windows. Models will use women's lockerroom to change.

Lectern and mic near corner windows.

Open food: assorted fruits and cheese platter per table

Dept	Item #	Description	Qty	Base	S/C	Tax	Ext Total
DRBEv	40016	O. J.	60	75.00	11.25	6.98	93.23
DRBEv	40019	PERRIER WATER	60	90.00	13.50	8.37	111.87
DRDIN	48101	APPLE TART	60	135.00	20.25	12.56	167.81
DRDIN	48047	OPEN FOOD DIN	60	225.00	33.75	20.93	279.68
OTHER	45009	STAGE RENTAL	1	40.00			40.00
RRENT	45518	BALLROOM CHARGE	1	50.00			50.00

◄◄ ◄   1 of 1   ► ►► Cancel ⊡ 🖨 📷 📄 **Close**   6 of 6   Total:6   100%

...or recall the Contract Builder to create and print a personalized event contract...

ADMIN @ Contract Builder - Womens Fall Fashion Show - 09/18/2007

File Reports Info Help

Detailed Items

Event #	Event Name	
197	Womens Fall Fashion Show - 09/18/2007	1 - West Dining Room

Contract Viewer

Event Contract Agreement dated: 09-11-2007

Event#197 - Womens Fall Fashion Show
Event date: 20070918

Karen Thomas and ABC Golf Club hereby agree on the item
details and arrangements specified on any preceding pages as
well as to the following contract terms:

AGREEMENT
The outlined arrangements are being held on a tentative basis
for a maximum of fourteen (14) days from the contract
origination date. Arrangements will be confirmed on a definite
basis upon the receipt of the signed contract and a confirmed
method of payment for the above outlined event.

BEVERAGE SERVICE
ABC Golf Club can provide a full service bar with a wide choice
of liquors, beers, and wines for your event. Our staff and
managers have been trained in an alcohol awareness program
and it is the policy of ABC Golf Club to comply with all state and
local laws pursuant to alcoholic beverage service, including,
but not limited to:
- Persons under 21 years of age are not permitted to consume
alcoholic beverages.
- Any persons who are known to be intoxicated will not be
served alcoholic beverages.
- All alcoholic beverages consumed on the property must be

Clear
Move UP
Move DOWN
Add Component
Remove Component
Reload/Refresh View
Save Components
Exit

Components in use

cb-heading1.txt
cb-blankspace.txt
cb-agreement1.txt
cb-blankspace.txt
cb-beverage1.txt
cb-blankspace.txt
cb-food1.txt

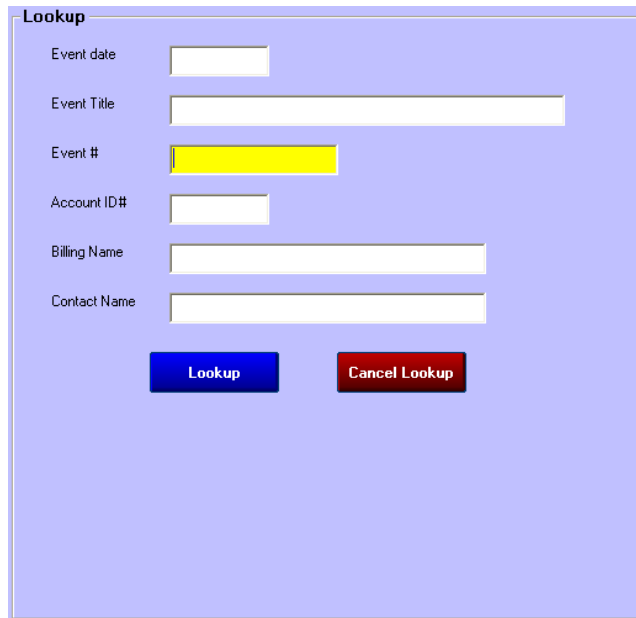*Available Contract Components (cb*.txt)*

cb-additionalfood1.txt
cb-agreement1.txt
cb-beverage1.txt
cb-blankspace.txt
cb-cancel1.txt
cb-cancel2.txt
cb-cancel3.txt
cb-changes1.txt
cb-cleaning1.txt
cb-decoration1.txt
cb-decoration2.txt
cb-deposit1.txt
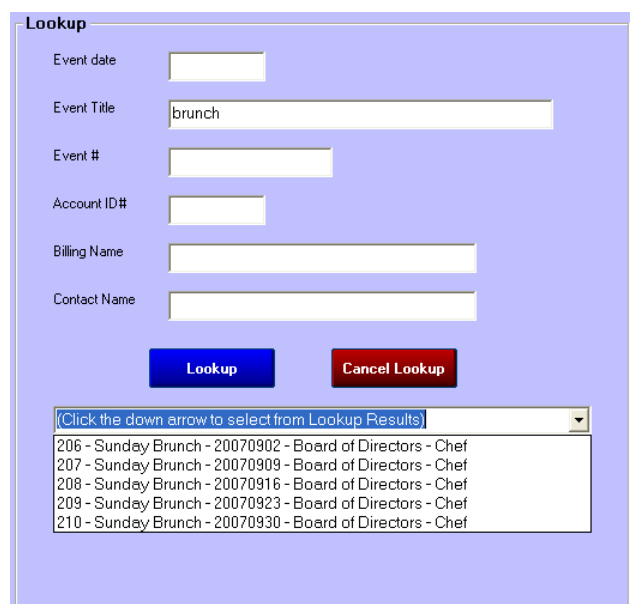cb-deposit2.txt
cb-extra1.txt

Done

Lookup an Event

Click the LOOKUP button to display the lookup screen. You may search the database forward or backward from the current date by choosing different lookup criteria:

- **Procedure:** Searching for an event requires only a few, easy steps:
    1. Enter an appropriate piece of information (or partial piece) into the chosen box;
    2. Click the Lookup button;
    3. Select the desired event to view from of a list that will appear on the bottom half of the screen. When there is only one event from which to choose, it may be displayed immediately. If the event can't be found based on your lookup entry, a message will appear.

- **Event date:** type the MMYY of the date to search for (or YYYYMMDD if searching into a different year)
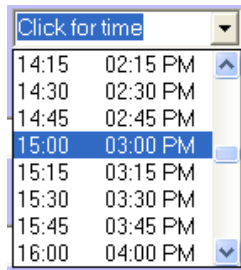
- **Event title:** type one or more words that might be in the event title. The lookup will search for events having the words embedded in the title.

- **Event #:** type the event number. Because event numbers are unique, this displays the event immediately because it's the most direct way to recall an event.

- **Account ID#:** this is the billing account number linked to the event.

- **Billing name:** enter the first or last or partial name; the lookup will display events having those characters as part of the billing name.

- **Contact name:** enter the first or last or partial name; the lookup will display events having those characters as part of the contact billing name.
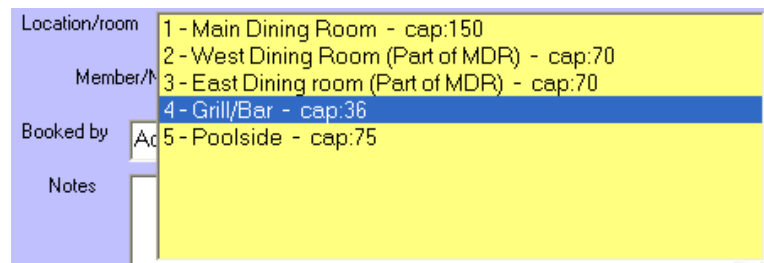
New Event/Event Detail Information Screen

Click the New Event button to open a new event number and display the event detail screen. Moving from box to box on the screen can be done either with the mouse, the TAB key on the keyboard or just by pressing the ENTER key after typing an entry. The currently active field turns yellow and a brief description of the type of data required is displayed at the bottom of the screen in the dark gray "helpwindow." Descriptions of the data fields and how they're used follows; if a field is required, it is noted as such:

- **Event date:** Required. The entry may be in MMDD or YYYYMMDD format (September 22, 2007 can be entered as 0922 or as 20070922. To enter a date into the next calendar year, you must enter the full YYYYMMDD value.

- **Event #:** Required. This is a system-generated number that is not user-changeable.

- **Status:** Required. Unless specified otherwise, a new entry will be automatically assigned as a "1-Contact Only" status.

  o **Status 1-Contact Only**: designed for making a list of contacts, phone numbers, addresses, possible events, etc. This status saves contact information in the *eventinfo* database table but does not reserve actual time or space in the event calendar. Status 1 is intended to provide a form of contact database for a catering manager who is actively trying to sell catering services. Note: For maintenance purposes, when a status 1-Contact Only event is active, the File menu includes an option to "Delete This Contact."

  o **Status 2-Reserved**: This requires all the elements of a status-1 event but also reserves the room, date and time in the event calendar. This status also requires values that the set for and guarantee fields not be blank.

  o **Status 3-Reserved w/Dep $**: This requires all the elements of a status-2 event, reserves the room, date and time in the event calendar, but also requires that a value be entered into the Deposit $$ field. In addition to that, since a deposit has been received, it requires that a billing account be established to hold the deposit value. (More information about Assigning/Linking to an account # is found later in this manual.)

  o **Status 4-Confirmed w/Count:** Requires all elements of a status-3 event but also requires that the guarantee field not be blank. When an event has this status, the "Bill Event" button becomes active in the menu bar.

  o **Status 5-Done/Billed:** Selecting the "Bill Event" button sets the event to this status, preventing it from accidentally being billed twice.

  o **Status 9-Cancelled:** Setting the event to status 9 causes the "Cancel Event" button to become active; click the button to remove the event from all calendar listings. Note that all event setup data is retained.

- **Event title:** Required. Every event must have a title of some kind; the entry is limited to 50 characters in length.

- **Start time/End time:** Required for status 2 or higher. Event Manager uses 24-hour time entries ONLY such as 09:30 for 9:30 a.m. and 15:30 for 3:30 p.m., etc. For your convenience, the 24-time is displayed in the left side of the box and its corresponding 12-hour time is immediately to its right. Using the drop-down time boxes makes selecting the starting and ending times easy:


- **Set for ???:** Required for status 3 or higher. Enter the expected number for guests to attend the event. This is almost always higher than the "guaranteed" number.

- **Guarantee:** Required for status 2 or higher. Enter the number of guests that are guaranteed to attend. This is almost always lower than the "set for" number. The guarantee is also the number of guests used as the basis for calculating the "per person" charge at the Item Detail screen and for most facilities, it is used to calculate the minimum price to event organizers.

- **Location/room:** Required for status 2 or higher. Double-click on the box to display a list of available rooms and their capacities. Select the room by clicking it in the list:

- **Member/Non-member**: This setting changes some of the screen display elements, reduces some of the requirements for saving data (for example, a deposit isn't necessary) and removes the ability to create a new account in the membership database in favor of linking to an existing account of an actual member or internal club account and not to an account that was created at some earlier time to accommodate an "outside" event. (Be sure to read the section about how to use the assign/link button, later in this manual.)

- **Deposit $$**: Required for status 3 and higher. This is a dollar-value entry (without the $ punctuation character). It is used on some reports, quote sheets and projections. Note that deposits do not automatically flow to the A/R system; advance payments and deposits are handled in the same manner as a member paying his/her normal bill. Note also that a deposit is optional with a status 1 or 2 event but is required with a status 3 event. (Required means non-blank; a zero deposit is an acceptable value and would likely be used for events linked to members or internal events such as board or committee meetings.)

- **Booked by/Creation date**: Required, managed automatically by the system and are not user-changeable.

- **Notes:** This is an optional memo field that is intended for specific instructions in delivering the event to the customer. It's a good place to enter special table arrangements, other telephone numbers you may need, information about setting up the room, number, location and types of tables (banquet, rounds, etc.), where a podium, lectern or microphone should be located, other special audio-visual needs, assign responsibility to various individual or any other information that may help either the catering or event setup staff. Notes print on event catering sheets and contracts and can be intensely helpful to your operations personnel.

- **Internal Notes:** Another optional field is available for internal notes that are not intended for the consumer's view. Select the Internal Notes button to view this field. The button will show "Internal Notes Exist" if an event includes them and only "Internal Notes" if it does not.
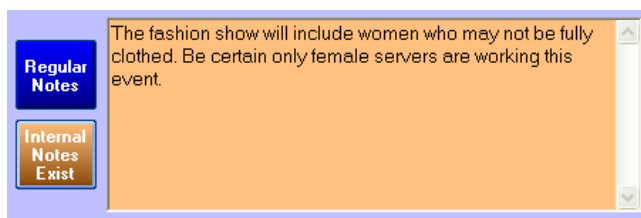
- **Billing Account Information/Contact Information:** This address information is fairly self-explanatory and while the billing and contact are identical in form, the two panels of information are actually for different purposes. For example, status-1 and 2 events require only a contact name and phone number. But status 3 and 4 events require that either an event billing account be created (for non-member events) or that the event be linked to an existing member or other internal billing account. Here are some guidelines that should be helpful:

  o Contact name and number are the only two fields of information on the "contact information" panel that are required. All the other contact fields are optional.

  o When an event is linked to an account, the account information is brought into Event Manager and populates the appropriate boxes.

  o A handy **"make contact info same as billing info"** button at the bottom of the billing information panel will populate the contact panel with the same information as is displayed on the billing panel. For a non-member event, a similar button appears at the bottom of the contact information panel to transfer the contact info to the billing information panel. This button is not available when the event is tagged as a member event.

How to use the Assign/Link to Account # Button

Depending on the "member" or "non-member" setting, the billing account information panel displays the button as follows:

When the button is in "link to member #" mode, Event Manager can only link to existing membership accounts and will not generate and assign a special "event" account to the currently active event. It is assumed that membership accounts are managed through the normal course of managing the membership. However, in the case of "outside" non-member events, it is necessary to create an account inside the membership database that will be used for billing the event, even though this special "event billing account" is not really a membership account in the truest sense of the term. Such an event billing account is a "convenience" account and exists only for the purpose of accepting deposits from non-members in prepayment of the event and the eventual billing of the event when it is completed. (You may wish to review the portion of the manual that explained "event class codes" and "event billing codes" that are set up in the main configuration module.)

When the non-member setting is active, Event Manager can not only create a new account in the membership database, it will also update that account with billing and contact address information from Event Manager. In this way, the manager in charge of events can keep the membership database updated with correct billing and contact information that pertains to outside events without requiring access to the membership system directly.

In summary, Event Manager can create and update member database accounts for non-member events only based on the configuration settings already established for non-member events managed via Event Manager, but Event Manager cannot change existing membership accounts; those accounts can only be changed through using the Membership Manager.

# How to Move an Event to a Different Date, Time or Room

When an event status has been set to at least status 2, it occupies space and time on the event calendar. Moving an event in Event Manager is very easy to do and requires only the following steps:

1. Review the calendar to ensure that the new date, time or room is available;
2. Recall the desired event to the event detail screen;
3. Click MODIFY to enable editing;
4. Change the appropriate setting (date, time of day or room, or all three if you like);
5. Click Save.

How to "Clone" an Event

Periodically you may book repeating events such as for Rotary, Kiwanis or other organizations, or internal events such as weekly brunches, monthly committee or board meetings, bridge or other card playing groups, etc. Event Manager includes a "clone" function that allows defining one event and copying all of its settings to another date, making scheduling such repeating events a quick and easy process. Cloning an event is simple:

1. Recall the original event to the event detail screen.
2. Make certain all the event detail is correct, including individual item detail.
3. Click FILE – Clone Current Event to New Date. The following box appears:
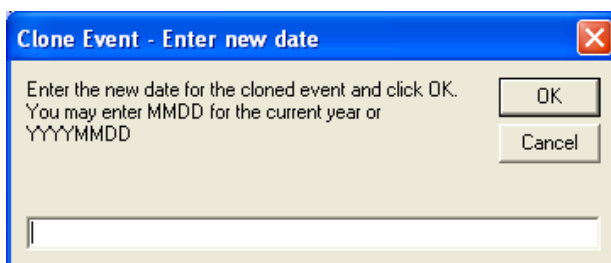
4. Type the MMDD date (or YYYYMMDD if the event is to be in the next calendar year) and click OK.
5. The event is immediately added to the event calendar for the chosen date.

How to Remove an Event from the Event Calendar

Event Manager maintains events based on the event status setting. Only events having status 2-5 are visible on the calendar. Therefore, removing an event from the calendar can be done simply by changing the status to either status 1 (contact only) or status 9, the "cancelled event" status. However, the distinction between the two status settings is subtle and should be noted:

- **Status 1** "events" are either contact names with phone numbers or are events that were pie-in-the-sky ideas and never germinated into something more than just an idea. Therefore, considering them as "lost revenue" isn't the most accurate way to describe them.

- **Status 9 (cancelled)** events are events that were a reality but because of some uncontrollable situation (weather, personal injury or death, etc.), had to be cancelled. Therefore, it could be argued that "cancelled" events can realistically be considered as "lost revenue" because had the calamity not occurred, the event would have gone on as planned.

The suggested procedure for "cancelling" an event is as follows:
1. Recall the desired event to the event detail screen;
2. Click MODIFY to enable editing;
3. Change the status setting to 9-Cancelled. The Cancel Event button will become active.
4. Click Cancel Event.

# How to Create an "Event Package"

An "event package" is a group of events that are related to one another. For example, your facility may enjoy a 25th or 50th anniversary celebration and many activities are planned over an entire weekend for your members to attend. It may be desirous to link the events together to make it easy to review the settings of each as changes to event plans occur. Event Manager includes the "package" function for doing this.

A package consists of a single **"parent"** event and one or more **"child"** events. The "parent" event is the one that establishes the package number; the package number uses the same number as the event number of the main, parent event. For example, if events 165, 169, 173 and 177 are related and you want to link them together, if you created the package using event # 173, then the package is numbered 173 also. An event can be linked to only one package at a time.

When an event is recalled to the screen, the following button will appear at the bottom of the screen if it is not already linked to a package or if no packages exist:

Click the button to receive a yes/no confirmation box to verify that you wish to create a new package. Answering YES produces a display at the bottom of the screen similar to the following:
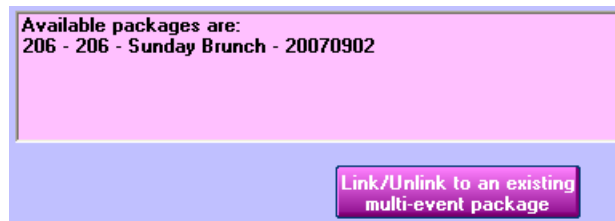

The screen display shows package 206 is linked to event 206, the Sunday Brunch and the date of the event. Because the package and event number are the same, event # 206 is the "parent" of package #206. Let's add more "Sunday Brunches" to the package... first, we'll recall another event to the screen.

When event # 207, the next "Sunday Brunch" event is recalled to the screen, two buttons are now available; when both are visible, it means that packages exist.


To see what packages are available, click the Link/Unlink button to display a list of available packages:
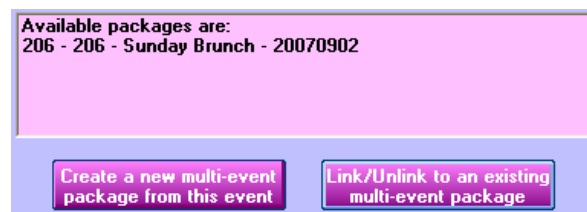

To link the event to an existing package, highlight the desired package in the list and click the Link/Unlink button; a confirmation box will appear, click YES to establish the "link" as the following box displays:
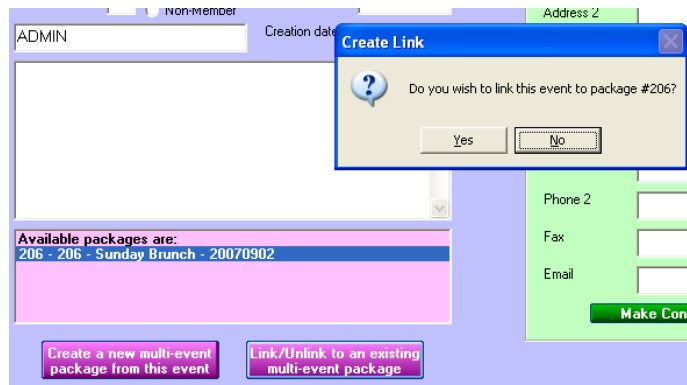
After linking, the display changes to the following, and anytime either of the linked events is recalled to the screen, this will display at the bottom of the screen to show that it is linked to another event.
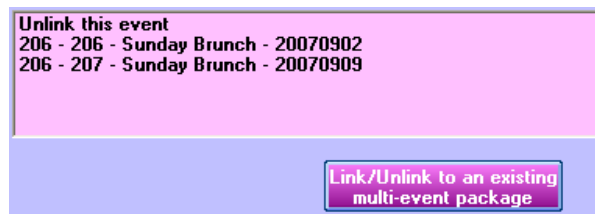

Let's now assume that several "Sunday Brunch" events are linked together. Recalling any one of them displays the package box at the bottom of the screen and all the events that are in that package. Viewing the details of another event in the package is as easy as double-clicking on the event to view in the package box and answering "YES" to the confirmation box. In the following example, we're currently viewing event #209 but the user wants to take a look at event #207:
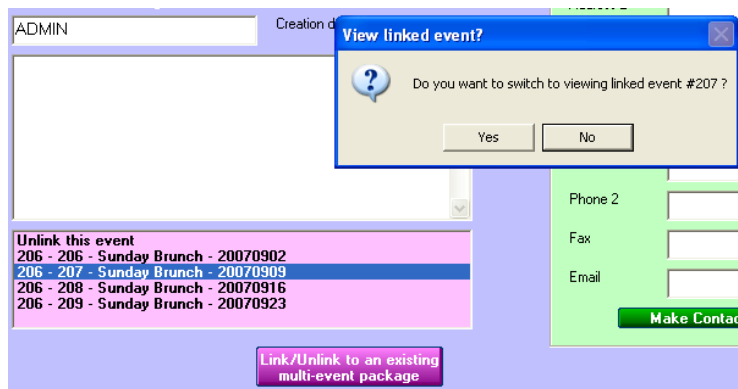
How to Unlink an Event

Unlinking an event from a package is just as easy as linking. Select "Unlink this event" in the package box, click the Link/Unlink button and answer YES to the confirmation box:
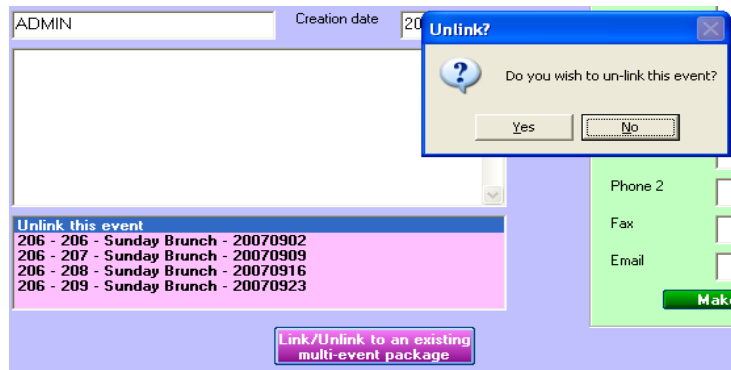
How to Delete a Package

Deleting the package itself is done by recalling the "parent" package and "unlinking" it from itself. Note also that deleting the package removes all linking for all child events that were originally tied to the package because the package no longer exists.

Event Billing

Event Manager can generate appropriate sales transactions for all detailed items linked to an event. The transactions are linked to the member number (or event# account) identified as the "billing account" for the event. Depending on the main configuration setting for "workspace" or "direct to account," the transactions are sent either to the A/R workspace for normal accept/post operations or directly through to the member account as "pre-accepted" transactions. During Event Manager's billing procedure, the user can also specify that the sales (and ensuing service charges) can also be linked to an employee by employee number. (See "tip pooling" comments earlier in the "Implementation Questionnaire" for ideas on allocating event service charges to multiple employees.) An event that has been billed then takes on the status of 5-Done/Billed, a status that is only reversible by a user in Administrator mode.

Event Manager's "Bill Event" button becomes active when the event status is set to 4-Confirmed w/Count:
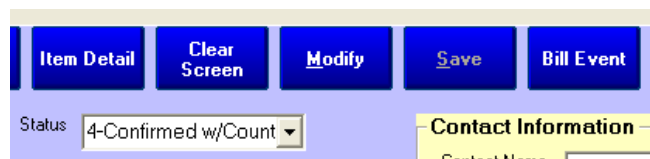

Status-4 Confirmed w/Count events are events that are likely not to change, or if they do, not to change very much. However, when you bill the event can have some effect on your internal operations:

- **Early billing:** If the event is billed prior to the event being conducted, any subsequent charges to the event such as additional food, beverage, or other amenities that event organizers ordered during the event will have to be added to the account via the normal A/R system and not through Event Manager. Early billing is a practice that is not recommended as it can easily lead to double-billing or at the very least, extra work for accounts receivable personnel in analyzing and editing the transactions that have already gone through.

- **After-event billing:** After the event has been conducted, the exact counts of items and services consumed or added-on during the event can be easily modified within the Item Detail portion of Event Manager, lists can be checked and double-checked for correctness and finally, the event billed to the account. This is the suggested method for it provides the most flexibility in making certain that event charges are correct and truly final.

How to Bill an Event

The billing procedure is really quite easy:
1. Recall the event to the event detail screen;
2. Make certain the appropriate items and item counts are assigned to the event;
3. Make certain the event status is set to 4-Confirmed w/Count and a "save" has been chosen;
4. Click the Bill Event button;
5. Answer Yes/No to the "Link to employee?" confirmation box:
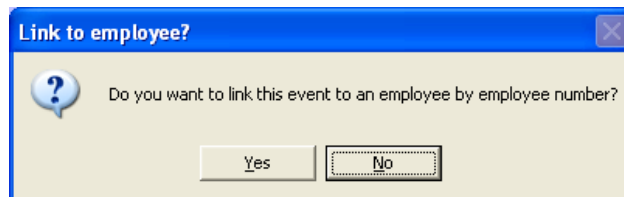
6. Lastly, a final yes/no confirmation box will appear to "Bill this event now?" Click YES to finish and bill the event or click NO to cancel billing. (Note: if there are no detailed items linked to the event, an additional message will appear which affords the opportunity to cancel billing, add items to the event and restart billing.)

Presenting the Final Bill to the Customer

It's sometimes advantageous to present the customer with a bill within moments of the conclusion of an event. Because system configuration settings and other Club Office modules such as SQLPos Point of Sale or other third-party POS system can have an effect on the timing of such an activity, there are multiple options available to the user. However, when all is said and done, there are essentially only two options: *(a) present the bill at the conclusion of the event or (b) present the bill at a later date.* Here are some operational considerations as it concerns presenting the bill to the customer:

1. Make sure the correct items are included before the bill is presented.
2. Present the bill in the form of one or more POS tickets to the customer at the end of the event; OR...
3. Present the bill as an Event Manager Event Detail report at the end of the event; OR...
4. Present the bill at some later date after processing all event transactions through the normal A/R system and printing an actual statement.
5. If using any POS system in conjunction with Event Manager's billing capabilities, be careful so that POS transactions and Event Manager transactions don't double-up the charges into the A/R system. For example, it would be easy for a bartender to ring up hundreds of drinks through POS to the event account while the catering manager has also added an item into Event Manager's item detail for the same drinks. Doubling-up most certainly and obviously should be avoided, and procedurally, your operations should be consistent so as to monitor this potential problem.

Here are some specific considerations as they relate to Club Office itself:

- **Club Office system is in currently in month-end A/R processing mode:** during this mode, the A/R system will not accept transactions from Event Manager (or SQLPos Point of Sale). Instead, a suitable "bill" can be produced by first making certain that the final quantities of all items and services consumed are correct at the item detail screen. Then, from the event detail screen, print an "Event Detail Sheet – External" from the menu of reports pertaining to the currently displayed event. This report includes all item charges and deposits made and produces a final total at the bottom of the report.

- **Event Manager configuration option set to use "A/R Workspace":** A suitable "bill" can be produced by first making certain that the final quantities of all items and services consumed is correct at the item detail screen. Then, from the event detail screen, print an "Event Detail

Sheet – External" from the menu of reports pertaining to the currently displayed event. This report includes all item charges and deposits made and produces a final total at the bottom of the report.

- Note 1: In "workspace" mode, sales transactions do not appear on statements until they have been "accepted" through the normal course of processing A/R transactions inside the A/R module.

- Note 2: When SQLPos POS is installed, A/R cannot be processed for a currently active day because SQLPos is using that day and feeding live transactions into the A/R workspace. Event Manager's billing transactions that have been sent to the A/R workspace therefore have the same status as SQLPos transactions and cannot be processed on the same day, either. Therefore, they cannot appear on statements until they have been processed from the A/R workspace.

- **Event Manager configuration option set to use "Direct to Account"**: In this mode, after billing the event you may use the Membership Manager to recall the event account to the membership screen and select "View Current Statement" from the Membership Manager's File menu. Alternately, if you have access to the A/R system, you may print a statement via the normal method through the A/R system's statement printing module. Such statements reflect any deposit payments and sales transactions applied to the account, including aged balances, etc.

## Presenting the Event Bill via E-mail

Any report or statement that is viewable on the screen inside any Club Office module can be emailed direct from the viewing window. This assumes, of course, that email is properly configured and functional on the computer being used. At the bottom of Club Office's report viewing screens is a set of icons such as these:

The email function is available by selecting the small **envelope/paper clip icon** just to the left of the Close button. Choosing it displays an "export" box similar to this:
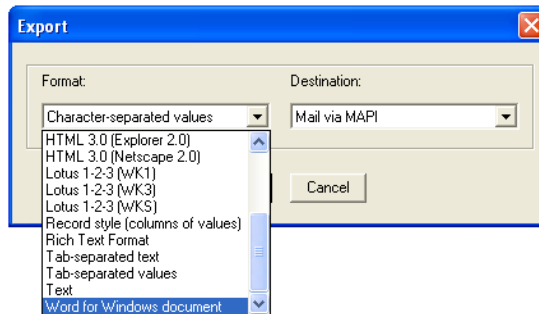
Click the down arrow on the left side to change the "Format" of the email and choose the format option of your choice. In the example above, the user has chosen to send the report as a "Word for Windows document." On the right side of the screen, the Destination is "Mail via MAPI," which is the email setting. Click OK to continue.
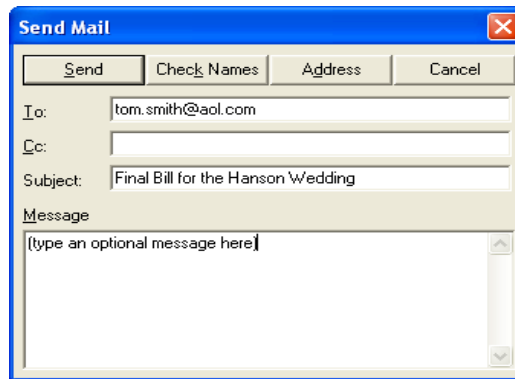
The "Send Mail" box that appears is the standard, Windows MAPI email screen. Type the recipient's email address in the "To" box, type an appropriate topic in the "Subject" box, and type an optional message if you wish. When done, click the SEND button.

Disclaimer: The successful sending of an email directly from within a Club Office report window is dependent on multiple factors that are completely outside the control of Event Manager, the Club Office system and/or Club Data Corporation. It is entirely possible that even if the sending of the document is successful, it may not be legible or readable by the intended recipient for the successful receiving and opening of emailed documents is dependent on the recipient's computer system configuration. Because of these multiple uncontrollable mitigating factors, Club Data cannot respond to user questions about email issues.

Club Data does provide a free Report Viewer module that end users can download from www.clubdata.com/dloads/setupreportviewer.exe, install on their computers and/or distribute to their customers. After installation, when the recipient opens the attached document sent from a Club Office application, it opens in the Report Viewer window. The report viewer requires that the "Crystal Reports (RPT)" format be chosen as the export format instead of Word for Windows or the other report formats.

Email Generator

In the Promotion option of Event Manager's reports menu is a link to the Club Office Email Generator. When used from with Event Manager, Email Generator uses the email addresses that are associated with event contacts instead of those assigned to the billing accounts because Email Generator can also be run from within the main Club Office Report Generator module; functionality to use billing account email addresses is already available there.

Please note that the Email Generator also uses the standard, built-in Windows MAPI system for sending email directly from Club Office and as such, the same issues that apply to sending a bill via email also apply to using the Email Generator for event promotions.

In practice, we have found that Microsoft Outlook Express is the tool of choice for compatibility when sending email via the Windows MAPI. Outlook Express includes security settings that allow more flexibility than Microsoft Outlook does. Additionally, Outlook Express is usually installed as a common component of the Windows operating system. Microsoft Outlook can generally be configured to work, but Outlook's security and other settings often are problematic when other applications (i.e. not Outlook) attempt to send email: Outlook often blocks them as it considers them to be Internet virus applications.

Other email sending issues that arise usually involve anti-virus and/or firewall software settings. If everything seems to be configured correctly but emails just don't go, look to those application settings for the solution. They can be very tricky to solve and are obviously outside of the scope of this manual.

Adding/Changing Event Item Detail

Event items are the billable elements of the event such as food, beverage or other amenities or services, including audio visual equipment rentals, etc. The item screen provides functionality to select detailed items, amenities and services that are to be included with the chosen event, which then can create the event overall and/or per-person prices, finally culminating into the total event cost to event organizers as charged through the A/R system to the event account. Adding/linking items to an event is easy to do; the basic procedure is as follows:

1. Recall an event to the Event Detail screen.
2. Click the Item Detail button at the top of the screen
3. Select a department having the inventory items you need to add
4. Select the items from that department
5. Repeat with other departments/other inventory items as needed

Relationship to Club Office Inventory

Event items are created and managed via the Club Office inventory module. Such items are also linked to sales accounts via the inventory module, which then provides Event Manager with the capability to generate sales transactions that are billable to the account responsible for the event and have those transactions flow through the accounting system and automatically be posted to the proper revenue accounts. While inventory concepts and strategies won't be covered in this manual (they're extremely broad topics unto themselves and are addressed within the Inventory Module itself), it is important to understand a little about how Event Manager relates to the whole Club Office system, because in an integrated system, the modules are quite dependent on one another. By following this through, you'll have a better understanding of the flow of Event Manager sales data:

- Event Manager's facility for creating event pricing is built solely into the Item Detail screen. There is no other mechanism inside Event Manager to create a price that can be displayed on a statement and presented to the customer for payment.

- The Item Detail screen uses individual inventory items that have been created from within the Inventory Manager. When an inventory item is added to an event, it brings with it all the configuration settings that were applied to the item when it was created inside the Inventory Manager, including the selling price, the sales tax and service charge percentages and whether the sale of that item applies to a minimum, prepaid, installment or totaller in the financial section of the billing account record.

- The Inventory Manager is used to create inventory items for sale and to set retail and alternate retail pricing at the individual item level. It also links the individual inventory items to Accounts Receivable (A/R) sales accounts to acquire the proper settings for applying sales tax and service charges, as well as whether the sale of that item applies to a member minimum or prepaid, installment or totaller. In short, when an inventory item is created, it brings with it all the configuration settings that apply to the A/R sales account to which it is assigned. This is how Event Manager gets its pricing and other settings – from the inventory item which has in turn taken the same settings from the A/R system settings.

- Sales tax settings, service charge settings, and other settings that affect member minimums, prepaids, installments and totallers are managed at the individual A/R sales account level from within the A/R portion of the main Club Office configuration module.

- The A/R system gets its sales accounts from the main Club Office General Ledger (G/L) configuration module, which is where the system-wide accounts are initially created. Only level 1 (detail) G/L accounts can be used as A/R sales accounts.

- When the A/R system is finalized at the end of a month, it creates sales totals for each A/R sales account that was used during that month. Since the A/R account numbers are identical to G/L account numbers, these totals are posted to the general ledger through the use of "G/L journal entries" that the A/R system creates for each A/R account number.

- At the end of an accounting period, the G/L journal is posted to the general ledger and sales totals are applied to their assigned account numbers, a profit/loss is calculated for the business and posted to the company's current year retained earnings account.

- Now the club's general manager can produce financial and other reports that are vitally necessary to the success of the overall company.

In essence, when an individual inventory item is added to an event, the etymology of that item actually goes all the way back to when the G/L account was originally created; the item's properties have been affected by what the user did from within the inventory module, the A/R configuration and G/L configuration modules, too.

Item Detail Screen

Left to right, the main operating parts of the item detail screen contain inventory department buttons, a grid containing inventory items of the currently active department, a column of "modifiers," and finally, the "selected items" grid on the right side of the screen that contains the items that are linked to the event. Above those items are the event number and name, a per person cost, and totals showing the subtotal of actual item cost, any calculated service charges and tax, and the final total on the far right.
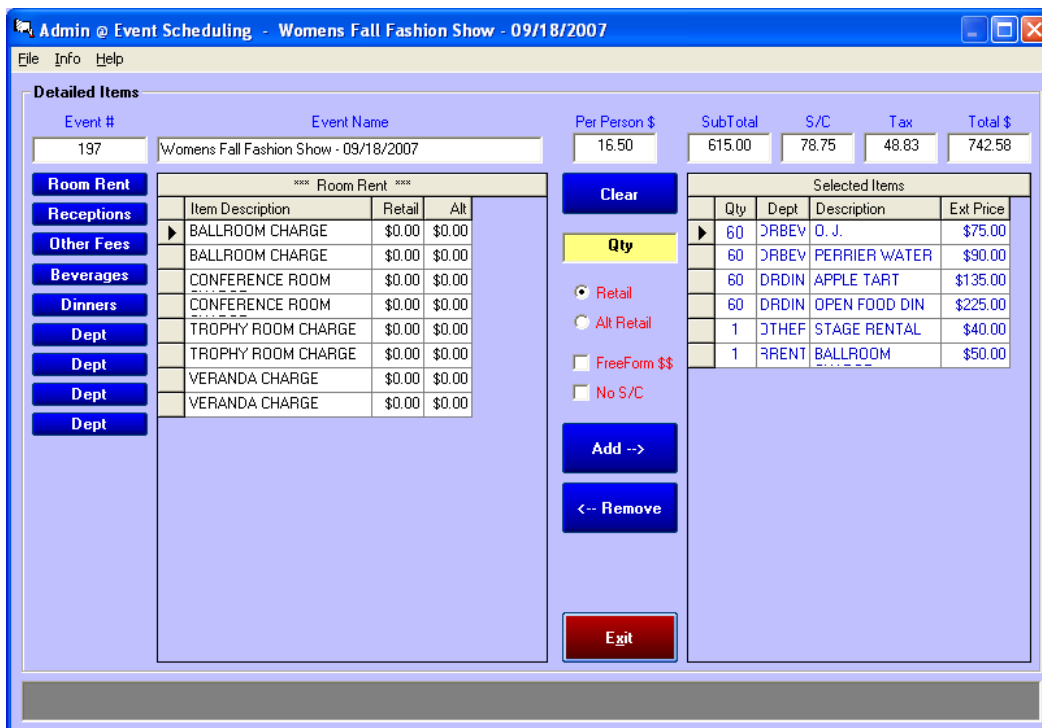
The only other user-selectable options available are in the File menu and include the ability to configure the department buttons and to show item costs in the inventory grid on the left side of the screen. *Showing item costs is important when using the FreeForm $$ modifier so that you know what wiggle-room you have when setting the selling price; setting it without knowing the item cost may cause selling items below their cost, and possibly creating a money-losing event.*

However, for internal events such as board or committee meetings or other operational functions that aren't revenue-generating activities in the truest sense of the word, you may want to use the FreeForm $$ modifier to set item selling prices to zero dollars. Of course, it's not likely that you'd actually send a "bill" to the Board of Directors anyway, so what pricing you use for such internal events may be moot altogether if it's not the intention to bill them anyway. But setting the prices to zero for these events is still a good idea so as not to skew the revenue projection reports Event Manager can print.

Item Detail Modifiers

Near the center of the screen is a column of various modifier options that need explanation. These settings affect what the eventual price total will be and how Event Manager should treat the inventory items as they are added to the list of selected items for the event:

Clear: clears all the items that are currently linked to the event. Like a "start over" button.

Qty: Must be 1 or greater to add items to the "selected items" list. When an item is added, the total price for that item is the price multiplied by the quantity.

Retail: when chosen, items are added at their stated retail price.
Alt Retail: when chosen, the alternate retail price is used instead of the retail price.

FreeForm $$: when chosen, set the selling price on-the-fly as items are selected.

No S/C: turns off the calculation of service charges as items are added. Use this if you plan to include a flat fee for all service charges when the event has been concluded.

Add→: adds the highlighted item in the inventory list on the left to the event items list on the right.

←Remove: removes the highlighted item from the event item list on the right.

Exit: closes the item detail screen and returns to the main event detail screen.

# How to Add Inventory Items to an Event

1. Type the Quantity of that item to add into the Qty box in the center modifier column. The quantity setting must be one or greater to add items to the list. Also be aware that sometimes you may want to add only one or two of an item (podiums, microphones, tables, centerpieces, etc.) while with food and/or beverage items, the may be closer to the "set for" or "guaranteed" counts.
2. Select the retail/alt retail setting as well as other modifiers. Note that like the quantity value, these items can be changed anytime prior to adding an item; the settings only apply as items are added.
3. Select the department to display by clicking the desired department button.
4. Select the item in the inventory list (left side of the screen) to highlight it.
5. Click the Add→ button to add it to the list of selected items for the event. (Alternately, you may double-click the item in the inventory list to perform a "highlight and add" automatically.)
6. Repeat with other departments and inventory items until all amenities have been added. As each item is added, the event costs and per person costs are recalculated instantly.

How to Remove an Item from the Event Items List

1. Select the item to remove in the event items list on the right side of the screen.
2. Click the ←Remove button. (Note: unlike double-clicking an inventory item adds it to the event list, double-clicking an event item does NOT remove it.)

How to use the Task List

Event Manager includes a To-Do Task List that can help prioritize tasks or other reminders about your scheduled events. The option is located inside the Reports menu:
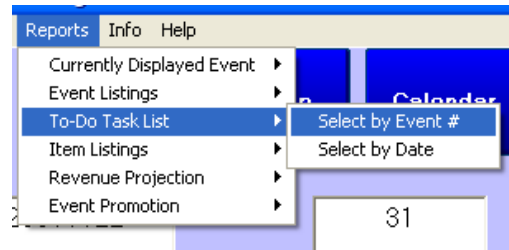
- **Select by Event #:** all tasks that are assigned to the typed-in event number (or the currently active event if one is already in the main information screen) are displayed in chronological order.
- **Select by Date:** all tasks that are assigned to the typed-in date are displayed. The default date is "today" for a quick look-up. If tasks are due for more than one event, tasks will be listed in ascending event number order.

How to add a task:

1. Click Add Task. A new line will be added to the display grid.
2. Enter the "to-do" date in the date box at the bottom of the screen; the other three small boxes are managed by the system and are not editable.
3. Type a description into the large box. Limit = 75 characters.
4. Click Save Change

How to change a task:

1. Select the task to edit in the display grid; the chosen task is displayed in the boxes at the bottom of the screen.
2. Change the desired information. Note that changing the "to-do" date effectively reprioritizes the list of tasks.
3. Click Save Change when done.

How to delete a task:

1. Select the desired task in the display grid.
2. Click Delete Task.
3. Confirm the deletion by selecting "Yes" to the confirmation box that appears.

How to mark a task as "completed"

1. Select the desired task in the display grid.
2. Click the "Task Completed" box at the bottom of the screen.
3. Click Save Changes.

Other

- The name of the staff member who either created or last changed a task is displayed in the "Staff" column.
- A report can be printed on the information displayed in the grid; click "Print List" for the report. Items that have not yet been completed are displayed in red:

Event Task List Report date: 11/14/2007 Page 1

Event #	Event Title	Event Date	Start Time	End Time
31	Thanksgiving Celebration	20071122	14:00	19:30

Task Description	Due Date	Done?	Staff Member
Plan menu with chef	20071001	YES	Jeremy
Draw promotional flyer and signage, take to printer	20071010	YES	Claire
Pick up promo sign - post sign in main foyer	20071022	YES	Jeremy
Pick up promo flyer, fold and ready for insert with statements	20071028	NO	Mari
Decorate dining room with seasonal theme	20071105	NO	Mari
Finalize count with chef, finalize serving and kitchen staff	20071117	NO	Mari
Send email reminder to members	20071120	NO	Mari
Reconcile applicable service charges to respective staff	20071123	NO	Admin

How to use Contract Builder

Contract Builder provides a way to create hundreds of different versions of event contracts out of individual component paragraphs, Contract components are akin to clauses in a contract; for example, your contract may have a section about payments, another about deposits, another about guarantees and cancellations, etc. Contract Builder allows stringing multiple paragraph clauses together into one contract document. With the creative use of the builder's key word capability, contracts can also be personalized to include any or all the information from the event's various information screens and the main Club Office company configuration database (company name, address, etc.).

Contract Builder is provided with a small set of generic sample contract components that may be used as-is to create sample contracts. Each may be easily modified with Windows Notepad by the end user for more personalization to meet your exact needs as well as correct legal requirements in your state. The provided components contain sample wordings of cancellation clauses, deposits, physical damages, payment terms, etc. and are not suggested legal wordings for actual contract use.
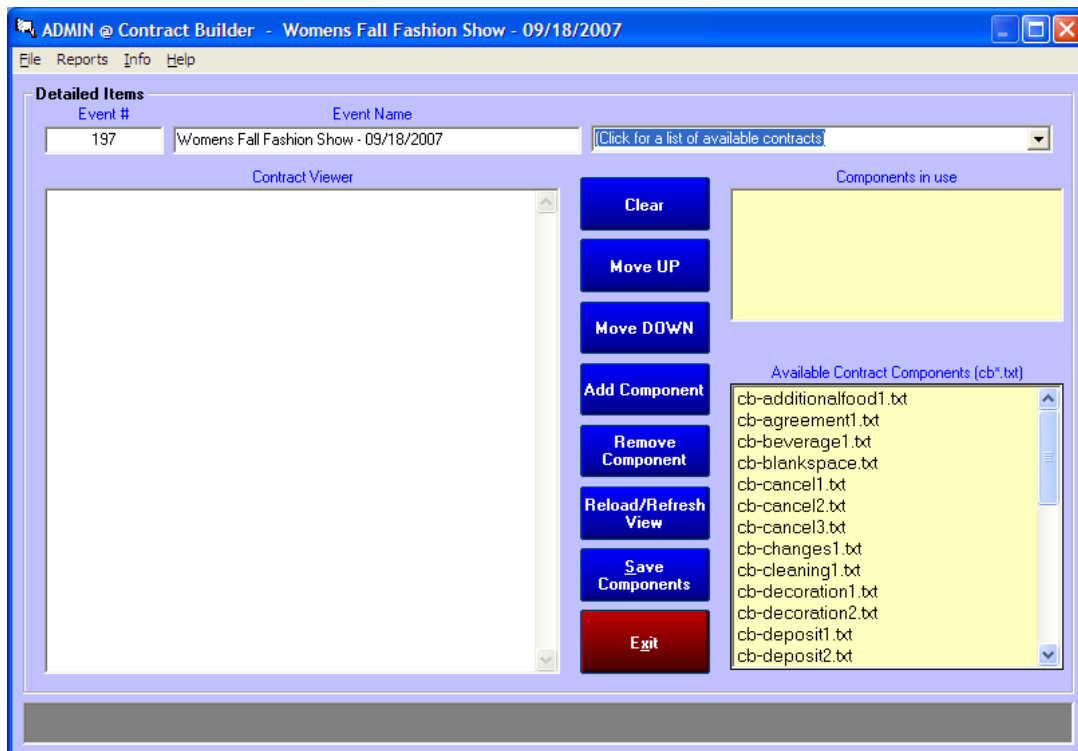
How to Create a New Contract

A new contract document must be opened before items can be added to it. It

1. Click the drop-down box arrow at the top right side of the screen for a list of available contracts.
2. Select the Create New Contract option. The system will automatically assign a contract number.
3. Type the description of the contract, up to 50 characters in length. Should you want to change the name later, you may use the change contract description option on the File menu.
4. Highlight a contract component in the lower right box on the screen; click the Add Component button to add it to the "components in use" box above it. It will be easier if the components are selected in the order they are to appear, although you can select them in any order you wish and use the "move up" and "move down" buttons to rearrange the order of the components.
5. Continue adding components until all those that are needed are included.
6. Click Save Components to store the list of components in the order they appear in the list. Important: Contract Builder does not store the actual contracts themselves: it keeps lists of components in the order they are to be printed and assembles the contracts from them on-the-fly so that when a contract is recalled later, it is personalized to match the currently active event.
7. Click the Reload/Refresh View button to parse the contract and display it in the Contract Viewer window on the left. In a few moments, you should see something similar to the following
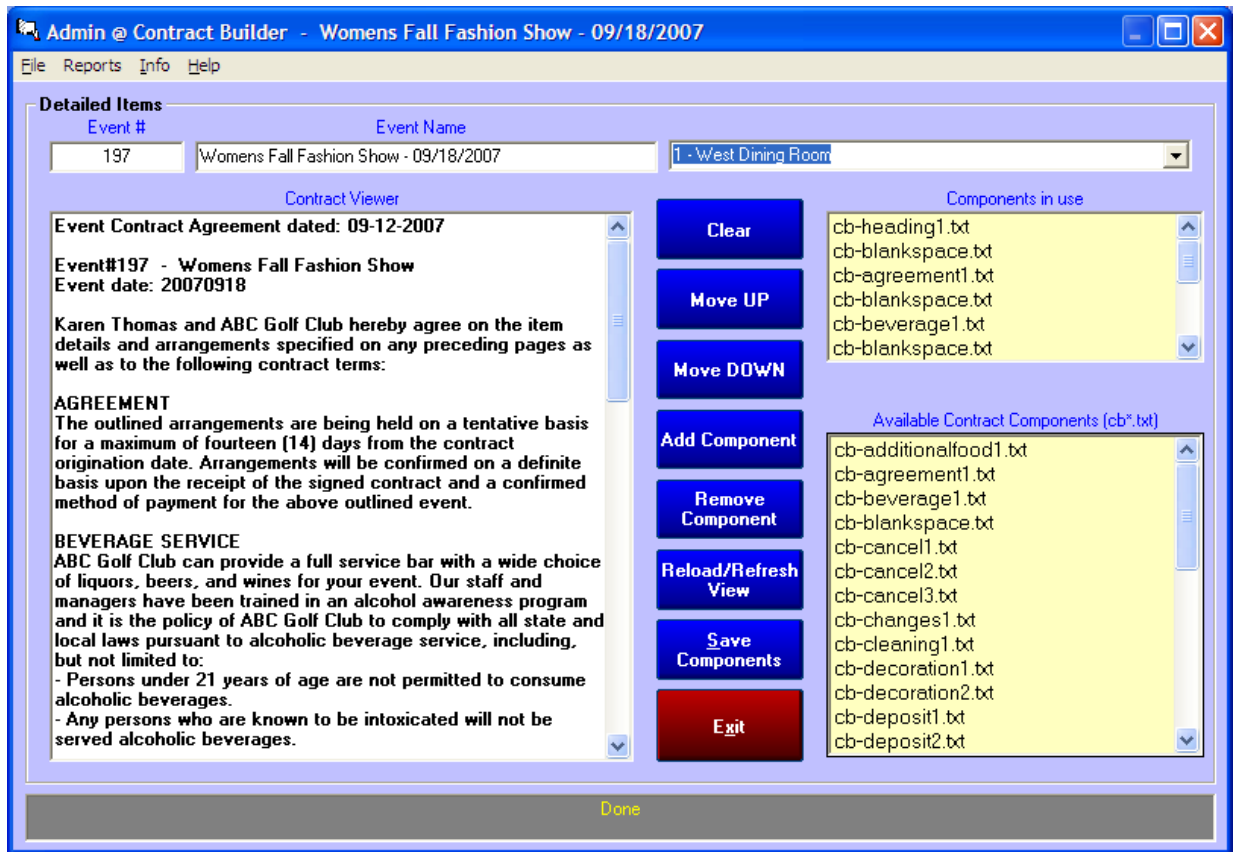
The contract viewer box on the left displays the contract text in the order it will be printed; although it's not an exact match to the formatting on a printed page, it's still easy enough to read through the text to make sure it reads as you wish it to.

It is not intended that a new contract be designed for each new event. The design intention behind the module is that "generic" contracts can be assembled so that they may fit multiple event situations. After all, you likely have a cancellation policy that you use for most of your contracted events, another policy regarding prepayment or deposits, damages, payment plans, etc. -- the contracts you already make probably have boilerplate language that's applicable for most of your outside activities. However, it may be helpful to have some contracts for charitable events and others for regular events, some for this room, some for that room, different ones when the swimming pool or golf course is involved, etc. Contract Builder provides a way to design as many different contracts as you need.

The text inside the contract viewer box is editable – you may click on the screen and edit or add text as you wish, but bear in mind that the contract viewer does not store contracts: *it stores lists of components and builds contracts from them on the fly.* Therefore, any changes made in the viewer box will be permanently lost when Contract Builder is closed. To make the changes permanent, the components themselves must be edited to reflect the desired changes so that the next time they are loaded into the viewer, the changes will already be there.

How to Use a Pre-Existing Contract

1. Start by recalling an event to the event detail screen so that it's the active event.
2. Select Contract Builder from the main detail screen.
3. Click the down arrow on the "list of available contracts" to display those on file and select the desired contract from the list.
4. The contract components for that contract will be loaded into the appropriate window, the contract viewer will display a "please wait" message while Contract Builder loads and parses the contract with the proper information for the existing event.

5. Continue as needed, either editing the text in the viewer box or printing the contract from the Reports menu.

How to Remove a Component from a Contract

1. Select the contract to use; let it load into the contract viewer box.
2. Select the component to remove in the "components in use" list.
3. Click the Remove Component button
4. Click the Reload/Refresh View button to redisplay the new contract.
5. If the change is what you want to have, click Save Components to save the new settings for the active contract.

Revising the Order of the Components

The contract is assembled in the order component items are listed in the components in use box. Select a component and click either the Move UP or Move Down button to move it to a different position in the list. Click the Reload/Refresh button to redisplay the contract in the new order. To save the new order, remember to click the Save Components button.

Printing Contracts/Other Reports

Several default contract formats are provided; some are designed for plain paper and others leave space for your own letterhead. Other options include printing address information in the correct position so that the recipient's address will show in a standard, #10 window envelope. All the predefined contracts also include all the detailed event inventory items as well.

Contract Builder includes a user-defined, user-designed format that prints only the text of a contract without showing the detailed event inventory items. The user-defined format is a good choice for printing a test contract that includes all possible contract components so that you can read what the components are.
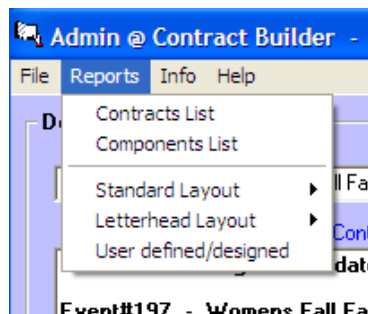
From a maintenance standpoint, you should periodically print a list of the contracts – the list shows the contract number and the description. Likewise, it can be helpful to print a list of the available contract components on your system. Knowing what you have available can help you determine whether you can use an existing contract for an event or whether you need to design a new one.

How to use Key Words

Each field of information on the event detail screen as well as company configuration information (club name, address, phone, etc.) can be represented by a "key word" in any contract component. Key words are surrounded by <> marks, such as <CLUBNAME>. Key words can be inserted into contract components and when printed, the key word is replaced with its respective value when the contract is reloaded or refreshed in the contract viewer. Through the creative use and positioning of key words inside components, contracts can be designed that have true personalization to an event. Key words are especially appropriate for user defined/designed contracts.

For example, consider the text of the following sample contract component:

This agreement is between <CONTACTNAME> and <CLUBNAME> and applies to event # <EVENTNUM>, the <EVENTTITLE> event to be held at <CLUBNAME> on <EVENTDATE>, beginning at <STARTTIME> in the morning.

Using embedded key words, a "generic" contract component can be used to personalize any contract without having to rewrite anything. When printed, the keywords would be replaced by the data of the currently active event so that it might read like the following example:

This agreement is between Bob Davis and ABC Country Club and applies to event # 342, the Rotary Club event to be held at ABC Country Club on 20071022 at 07:00 in the morning.

List of Contract Builder's Key Words

<EVENTDATE>	-	date of the event
<EVENTTITLE>	-	name of the event
<EVENTNUM>	-	event # inside Event Manager
<STARTTIME>	-	event starting time
<ENDTIME>	-	event ending time
<STATUS>	-	event status
<SETFOR>	-	number of expected guests
<GTD>	-	guaranteed number of guests
<LOCATION>	-	room location
<MEMNONMEM>	-	member or non-member setting
<CUSTID>	-	billing account #
<CUSTNAME>	-	billing name
<ADDR1>	-	billing address line 1
<ADDR2>	-	billing address line 2
<CITY>	-	billing city
<STATE>	-	billing state
<ZIP>	-	billing zipcode
<PHONE1>	-	billing phone 1
<PHONE2>	-	billing phone 2
<FAX>	-	billing fax
<EMAIL>	-	billing email address
<CONTACTNAME>	-	contact name
<CONTADDR1>	-	contact address line 1
<CONTADDR2>	-	contact address line 2
<CONTCITY>	-	contact city
<CONTSTATE>	-	contact state
<CONTZIP>	-	contact zipcode
<CONTPHONE1>	-	contact phone 1
<CONTPHONE2>	-	contact phone 2
<CONTFAX>	-	contact fax
<CONTEMAIL>	-	contact email address
<DEPOSIT>	-	deposit amount
<BOOKEDBY>	-	Club Office user who opened the event
<BOOKDATE>	-	date the event was originally opened
<NOTES>	-	event notes
<INOTES>	-	internal notes

Company/System-related key words (from the Company screen in main configuration):

<CLUBNAME>	-	name of the club
<CLUBADDR1>	-	club address line 1
<CLUBADDR2>	-	club address line 2
<CLUBCITY>	-	club city
<CLUBSTATE>	-	club state
<CLUBZIP>	-	club zipcode
<CLUBPHONE1>	-	club phone 1
<CLUBPHONE2>	-	club phone 2
<CLUBFAX>	-	club fax
<CLUBEMAIL>	-	club email address
<DATE>	-	the current date from the computer's internal clock

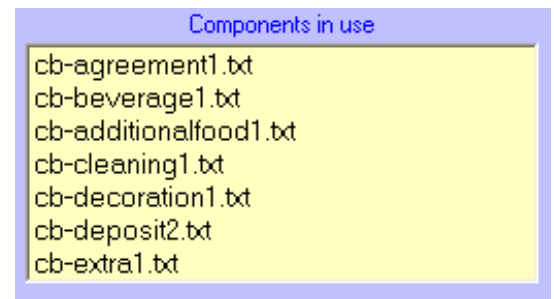# How to Add Your Own Contract Components to Contract Builder

Contract Builder components are ASCII text files, such as might be created using any text editor like Windows Notepad. For example, creating a new text file using Notepad and saving it with a file name that starts with the letters CB (case is not important), and placing the file inside the CDCO folder where Club Office resides, the file will be automatically added to the list of available components the next time Contract Builder is started because Contract Builder searches for files that begin with the letters CB and displays them in its list of components box.

Alternately, you may select any file having a .TXT file extension by clicking the File menu and selecting the "use all *.txt files" option. Unchecking this option reverts to the CB file type. Note: Club Office help files are also of the TXT file type; selecting this option will display many files that are not appropriate for contract use, although Contract Builder can certainly load, display and print them. If you use the TXT option, be careful so that what you select is appropriate for a contract.

User Defined/User Designed Contracts

Instead of using the default contract report templates, some users may wish to design their own. Formatting a fully user defined contract on a page involves a bit of trial and error, but this information may prove helpful to those who want or need to "roll their own" contracts. It's easy to do – you simply have to edit the various TXT files that make up your contracts.

How do you find out what TXT file elements make up a contract? Easy -- load a contract and look at the "Components in use" box to the right. The various text files your contract uses will be listed in the order that you have chosen them to build your full contract. Just make note of the file names listed. The actual files are located in the CDCO folder, and should be easy to find. Let's say you wanted to change the wording in the file you use for accepting deposits. In this example, the user has chosen the **cb-deposit2.txt** file as part of their contract. Here's how you'd change it:

Components in use
cb-agreement1.txt
cb-beverage1.txt
cb-additionalfood1.txt
cb-cleaning1.txt
cb-decoration1.txt
cb-deposit2.txt
cb-extra1.txt

1. Open the CDCO folder and find the cb-deposit2.txt file.
2. Double-click on it. Windows will display it in the normal editor window that you use for editing TXT type files. It's probably Windows Notepad.
3. Find the text that you want to change or add your own.
4. Click FILE-SAVE to save the changes. Then you can close the editor on the screen.
5. The next time you load that contract, the changed cd-deposit2.txt file will be part of the contract, and you'll see your changes right there in the viewing window!

- Designing your contract using Windows Notepad gives a fair representation to what Contract Builder will produce. Be sure that Notepad's word-wrap feature is turned on and that you separate paragraphs by pressing the "enter" key.

- To add blank space lines, be sure there's a blank space line in your original component. Or, to add a space between different components, you may wish to use the default "cb-blankspace.txt" file and insert it between components.

- Adding under bar lines into your contract for signatures and other write-in is sometimes challenging insofar as screen displays often don't accurately mimic the actual printed page because of the difference between proportional fonts for the screen vs. proportional fonts used for printing. Adding these open lines usually becomes a brief trial and error experience: print it out, make changes to your component, reload/refresh the contract and print it again to see the difference. You'll probably get it just how you want it in only 2 or 3 tries.

- You may wish to create a generic contract that includes basic contract verbiage that refers to one of the event detail reports as the items of the contract so that the customer is presented with two

documents instead of only one. You might have one that's entitled the "General Agreement" that refers to the other that might be named "Schedule A."

- You may want to create different contracts for specific rooms or locations at your facility. You also might want different contract wordings to present to members vs. non-members. Contract Builder can manage literally hundreds of different types of contracts, limited only by your imagination.

- Designing your own contract for use with Contract Builder still requires that your text file components reside in the CDCO folder alongside Club Office so that Contract Builder can load and print them. You may decide to create one large component or multiple smaller components that can be reorganized into a different order -- the choice is yours.

- Remember that when viewing any report on the screen in Club Office, that report can be exported to email, or possibly better yet, to a disk file. The "briefcase" icon at the bottom of the report viewing window is the "export to disk" tool; you could use it to take a contract containing multiple components, print it as a "user defined" type to the screen and then export it as a single disk file as a TEXT file type. Thinking "outside the box" can sometimes be pretty helpful!

Reports

Event Manager's reporting functions are located in the "Reports" menu bar option.
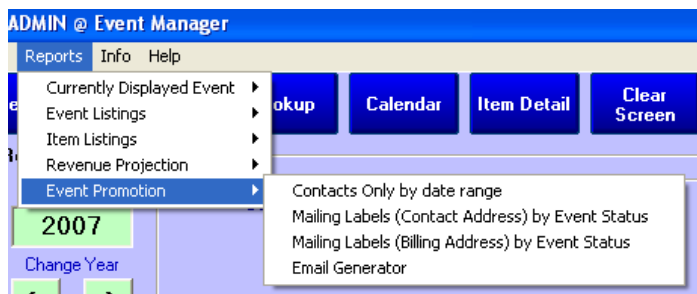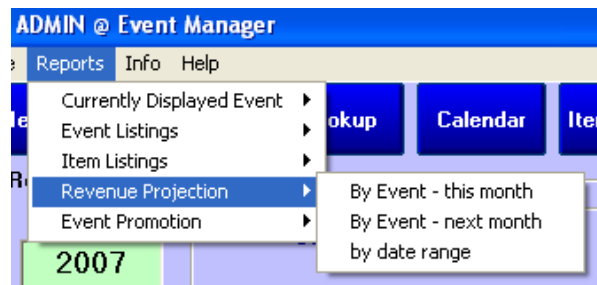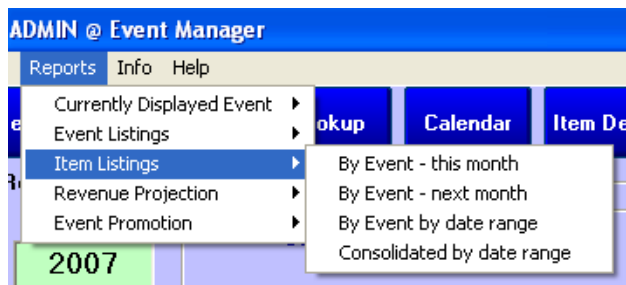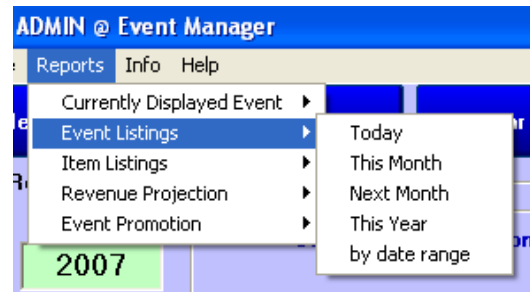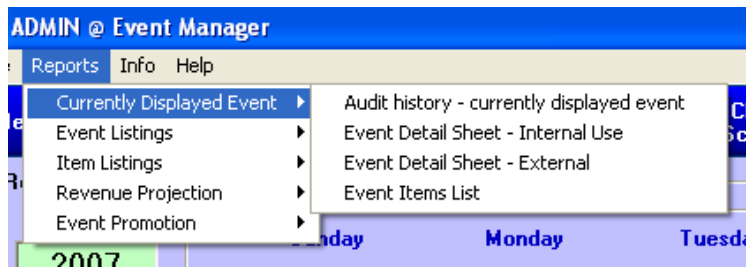
Event Manager includes an option to use the **Club Office Email Generator**, a powerful tool for promoting your facility to your event contacts. Email Generator sends individual, personalized emails to lists of contacts instead of to "mailing lists," and attachments can be used with it as well. It relies on a working email system on the computer which is being used; more information about this module is built into the Email Generator module's built-in help file.

Contract Builder has its own report menu; two maintenance-type reports are included: one prints a listing of available contracts and the components linked to them while the other lists all the available component files whose file names begin with the key letters "cb." Contract Builder's other reporting options print the actual contracts themselves in standard layouts for blank paper or those reserved with space for your personal letterhead. The "User defined/designed" format is just that: other than the horizontal spacing on the page, the vertical spacing of all contract elements is up to you.
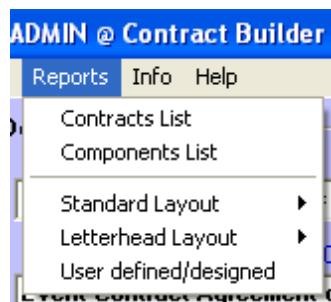
Miscellaneous Procedures

Internal Operations Accounts

Because it's usually desirous to separate member revenue from internal operations revenue, Club Office users usually create membership accounts that are used for "internal" sales. To some extent, Event Manager utilizes a specific class code (event manager configuration) for denoting events that are contracted by non-members. However, what to do with true, member events that are not tied to a specific member but are instead effectively sponsored by "the club?" Here are some suggestions of typical uses of INTERNAL accounts:

- **Board of Directors** – create a member account for events that are mandated by the board, such as an annual meeting, board meetings, election of officers, etc. Such activities are generally open only to members and as such, are "member" events.

- **XYZ Committee** – create a member account for each committee. Since committees are made up of members and conduct member-related functions, this is another type of "member" account. Use the account for scheduling their respective meetings as well as events that they organize on behalf of the membership.

- **Advertising/Promotion/Good Will** – create a member account to be used for special promotions or other good-will "giveaways" that aren't necessarily tied to a specific committee.

- **G/M or other Employee** – create member accounts for specific key employees for tracking specific goods/services consumed by staff.

- **Pricing –** internal operations accounts typically utilize "cost" pricing or certainly heavily-discounted rates when their activities are in support of normal club activities, such as committee meetings, board meetings, promotions, etc. However, when a committee sponsors an event such as a "Club Championship," "Commodore's Regatta," or "Guest Day," it might be a good idea to establish a separate membership account for the event itself instead of linking it to the sponsoring committee because such events are still intended to be profitable to the club as normal member revenue instead of a promotion, giveaway or internal operations account. You may also decide to create special inventory items that have zero or other special retail pricing and use them for activities tied to internal accounts.

- **Reconciling at end-of-month –** to the Club Office A/R system, an internal member account is really no different than any other account and if a transaction is "charged" against an internal member account, it appears as a normal receivable balance at the end of the month. Since the account is being used as a tracking mechanism for managing internal affairs and not as an actual receivable, this has the effect of inflating total receivables. You'll find the following to be helpful in managing such internal accounts:

  o Assign them to a specific account number range and use special class code inside your membership system. This makes them easier to locate and identify in listings. Make sure the dues billing code for internal accounts is zero and that the "no late fees" option is also checked. (It doesn't make sense to charge dues or late fees to yourself!)

  o Prior to generating month-end A/R charges, print a statement for each using the number range feature in the statement printing module, or at least print member aging report #11 to discover what the current balances are of your internal accounts. Then key "payments" to the internal accounts that have balances and "pay" them from their respective G/L expense accounts. This will then record the expense of conducting those committee activities while at the same time, netting-out the account balances to zero and eliminating the impact on the actual club's receivables.

What happens when "Save" is chosen after an edit

An edit is the most complex operation that a reservation system can have. Event Manager software must check many things before it can proceed while retaining the original information until the changes are complete so that in the event the changes cannot be made, the reservation can revert to the original. The checking comprises multiple queries to the databases before any data is actually saved and these complex queries can take a bit of time. Therefore, ***excellent local computer, server and network performance are paramount to the success of using Event Manager***. Here are some examples of what happens when "save" is clicked:

- Are all required data fields completed with valid information?
    - o The software validates all fields against what is required and/or allowed for each item.
        - ▪ If no, the user is notified with a screen message and data reverts to the original.
        - ▪ If yes, the software continues to the next step.

- What changes have been made? The software knows exactly WHICH fields have been changed from the original information – and the original information is retained in memory until either the save is completed, cancelled or a different reservation is recalled to the screen.
    - o Is it a date, room or time change?
        - ▪ If yes, the software must first ensure that the new date, room and times are available first
            - • If no, it needs to revert to the original information.
            - • If yes, it needs to make the changes and then remove the original date/time/room information to free it up.
    - o Is it a change to billing information?
        - ▪ If yes, the software must determine if the billing account already exists
            - • If no, it must to create it in the membership database.
            - • If yes, it relinks the information from the billing account to the event.
            - • If the billing information is for an "event manager" account (and not a regular member account) it needs to edit/update the billing information in the membership database with the event manager address/contact information.
    - o Is it a change to only event notes?
        - ▪ If yes, the data is saved directly to the record; no additional checking is necessary.
    - o Is it a change to the "set for" or "guarantee?"
        - ▪ If yes, the guarantee cannot be greater than the "set for" value, and the "set for" cannot exceed the capacity of the chosen room.
            - • If "set for" is greater than the chosen room, the user is notified and the save is not performed; the original data remains.
            - • Otherwise, the save continues with no other checking necessary.
    - o Is it a "clone" of an existing event to a new date?
        - ▪ If yes, the date/room/time for the target date are checked to see if they are open.
            - • If yes, the data is copied verbatim to the new date/room/time; the screen detail then displays the "cloned" event information.
            - • If no, the clone operation aborts and notice is provided on the screen that the chosen date/time/room is already in use.

- In addition to any of the above, an audit entry is made that logs what the changes were and by whom. This is stored in a file named "evntsched.ini" in chronological order. This is a parsable text file that uses the '\' character as a field delimiter. Over time the file can become quite large and potentially too large to import into Excel; Microsoft Word, Notepad, or WordPad may be alternate programs that can be used to delete the oldest (first) data, after which the file should be smaller and importable. If the eventsched.ini file is deleted, Event Manager will create a new one starting with the most recent data.

Notes: