

Sales

How to maximize your opportunities.

Day One

Tour Facility

Read this manual

* Read Ampa SOP's – Page 3

* Searching Job Charge – Page

* Practice Making Proposals – Page

* Ampa Standards on Labor/Delivery – Page

* Wholesale Accounts – Page

Read Ampa Kit Proposals (use learned search information to locate).

Practice Making Proposals

Standard Operating Procedures

** I can't take screen shots of my system to insert here. Will have to cover with another log in.

Job Charge

Basic Searches – Page

Clients and Territories – Page

Outreach Activities – Page

JobCharge Home Page

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory Clients Vendors

MAIN MENU

JobCharge Customized for:

 **AMPA EVENTS**
6701 JANWAY RD
HENRICO, VA 23228

 EnglishComp

Active Jobs

Job #	Inv?	Job Name	Type	Client	Date	Time	Location	Agent
12473	<input checked="" type="checkbox"/>	Chair and Pillow Delivery		Albrecht Events	08/23/19	10:00 AM	10300 Mill Run Circle, Owing Mills	Ted Rubis
12187	<input checked="" type="checkbox"/>	Wedding at the Mellon- Decor	Design &	Shankar Wedding	09/01/19	5:00 PM	Mellon Auditorium	Heather Ernst
12441	<input checked="" type="checkbox"/>	Library Event	Design &	Events By TRB	09/06/19		Washington, DC	Heather Ernst
12471	<input checked="" type="checkbox"/>	Esto Chandelier Frame Pick	Pick Up	Olivia Spear	09/12/19	8:00 AM	Pick up	Heather Ernst
12395	<input checked="" type="checkbox"/>	Carpet Installation	Rental w/	Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst
12275	<input checked="" type="checkbox"/>	Off-site Dinner - Vintage	Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis
12356	<input checked="" type="checkbox"/>	Color Me DC		Capital City Events CCE	09/25/19	6:00 PM	Watergate	Ted Rubis
12355	<input checked="" type="checkbox"/>	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis
12186	<input checked="" type="checkbox"/>	Literary Awards	Rental w/	Library of Virginia	10/19/19	6:00 PM	Library of Virginia Foundation	Leslie Amason
12442	<input checked="" type="checkbox"/>	Planning Services -	Planning &	Hunton Andrews Kurth	10/22/19		Shed	Ted Rubis
12367	<input checked="" type="checkbox"/>	Halloween - Harry Potter	Design &	Army Navy Country Club	10/25/19			Ted Rubis
12365	<input checked="" type="checkbox"/>	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/08/19		Army Navy Country Club	Ted Rubis
12366	<input checked="" type="checkbox"/>	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis
12332	<input checked="" type="checkbox"/>	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Sandra Crowe


JobCharge (FM17s-Mac-mini.local)


File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory Clients Vendors

MAIN MENU

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Active Jobs **Active Proposals** **Reconciliation**

Job #	Inv?	Job Name	Type	Client	Date	Time	Location	Agent
12473	<input checked="" type="checkbox"/>	Chair and Pillow Delivery		Albrecht Events	08/23/19	10:00 AM	10300 Mill Run Circle, Owing Mills	Ted Rubis
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12471	<input checked="" type="checkbox"/>	Esto Chandelier Frame Pick	Pick Up	Olivia Spear	09/12/19	8:00 AM	Pick up	Heather Ernst
12395	<input checked="" type="checkbox"/>	Carpet Installation	Rental w/	Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst
12275	<input checked="" type="checkbox"/>	Off-site Dinner - Vintage	Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis
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12355	<input checked="" type="checkbox"/>	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis
12186	<input checked="" type="checkbox"/>	Literary Awards	Rental w/	Library of Virginia	10/19/19	6:00 PM	Library of Virginia Foundation	Leslie Amason
12442	<input checked="" type="checkbox"/>	Planning Services -	Planning &	Hunton Andrews Kurth	10/22/19		Shed	Ted Rubis
12367	<input checked="" type="checkbox"/>	Halloween - Harry Potter	Design &	Army Navy Country Club	10/25/19			Ted Rubis
12365	<input checked="" type="checkbox"/>	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/08/19		Army Navy Country Club	Ted Rubis
12366	<input checked="" type="checkbox"/>	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis
12332	<input checked="" type="checkbox"/>	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Sandra Crowe

Searches

- Don't search directly from this page. As it doesn't give you all the fields to search from or the list function at the end.

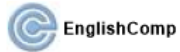
MAIN MENU



JobCharge Customized for:

AMPA EVENTS

6701 JANWAY RD
HENRICO, VA 23228



Active Jobs Active Proposals Reconciliation

Job #	Inv?	Job Name	Type	Client	Date	Time	Location	Agent
12473	<input checked="" type="checkbox"/>	Chair and Pillow Delivery		Albrecht Events	08/23/19	10:00 AM	10300 Mill Run Circle, Owing Mills	Ted Rubis
12187	<input checked="" type="checkbox"/>	Wedding at the Mellon- Decor	Design &	Shankar Wedding	09/01/19	5:00 PM	Mellon Auditorium	Heather Ernst
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12365	<input checked="" type="checkbox"/>	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/08/19		Army Navy Country Club	Ted Rubis
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12332	<input checked="" type="checkbox"/>	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Sandra Crowe

Basic Searches

*Events

- Click on the arrow next to job name to open Job a.k.a 'Event'

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 **ampaevents.com**

Agent **Ted Rubis** Agent 2 **Leslie Amason**

Find Client **Albrecht Events** Contact 1 **Lauren Caruso Barnes** Contract History

12473	08/23/19
11867	11/11/18
11852	09/27/18
11763	06/18/18

Record Date **08/15/19** Active?

Status
 Proposal
 Event
 Expired

Contract **08/19/19**
 Out
 In
 In with Deposit

Contact
Lauren Caruso Barnes 05/07/18 Title **Managing Director**
 Email **lbarnes@albrechtevents.com**
 Address 1 **209 Providence Lane**
 Address 2
 City **Lansdale PA 19446 USA**
 Phone/Fax **(215) 699-3784**
 URL **http://www.albrechtevents.com/contact**

Contact 2
 Title
 Phone/Fax
 Email

Job # **12473** Event Name **Chair and Pillow Delivery** Preferred Contact Method
 Event Date **Friday, 08/23/19** Start Time **10:00 AM** End Time **11:00 AM** Service Type
 Location **10300 Mill Run Circle, Owing Mills Md** How did Client find Ampa?
 Agent Activity Level
 Marketing Cue

Paid in Full

Notes **Event Information** **Schedule** **Proposal** **Event Activities** **Accounting** **Map**

- Home
- Calendar
- New
- Find
- Billing
- Inventory
- List
- Dupe
- Contract
- Pick List
- Delivery Report
- Flag Report
- Labels

Job - Event Page

- To Search within FileMaker/
 JobCharge use
 Ctrl+F (PC)
 Command+F (Apple)

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Requests Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find Agent Agent 2

Client Contact Email Address 1 Address 2 City Phone/Fax URL

Contact 1 Title Phone/Fax Email

Contact 2 Title Phone/Fax Email

Contract History

Record Date Active?

Status
 Proposal
 Event
 Expired

Contract
 Out
 In
 In with Deposit

Job # Event Name Preferred Contact Method

Hollywood

Event Date Start Time End Time Service Type

How did Client find Ampa?

Agent Activity Level

Marketing Cue

Notes Event Information Schedule Proposal Event Activities Accounting Map

Home
Calendar
New
Find
Billing
Inventory
List
Dupe
Contract
Pick List
Delivery Report
Flag Report
Labels


Place cursor in field you wish to search.

- I entered Hollywood
- Hit enter to bring up all events with Hollywood in the name

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date


800.358.5451
ampaevents.com

Find

Client: **Tidewater Productions** (+)

Contact: Ken Carmichael | 09/03/09
 Email: kencarmichael@dobil.com
 Address 1: 4601 MAYFLOWER ROAD
 Address 2:
 City: Norfolk VA 23508 USA
 Phone/Fax: 412-965-4948
 URL:

Agent Contact 1:
 Title:
 Phone/Fax:
 Email:
 Contact 2 (+):
 Title:
 Phone/Fax:
 Email:

Contract History:

6456	10/17/10
6605	10/16/10
6635	10/10/10
6634	10/10/10
6547	09/29/10
6532	09/25/10
6521	09/18/10
6457	09/05/10
6444	08/28/10

Record Date: 08/27/10 Active?
 Status:
 Proposal
 Event
 Expired
 Contract: 10/15/10
 Out
 In
 In with Deposit

Job #: 6456 Event Name: Hollywood Promo for Shula's
 Preferred Contact Method:
 How did Client find Ampa?:
 Agent Activity Level:
 Marketing Cue:
No Payment

Event Date: Sunday, 10/17/10
 Start Time: End Time: Service Type:
 Location:
 Event Information: **Notes** | **Event Information** | **Schedule** | **Proposal** | **Event Activities** | **Accounting** | **Map**

Event Date: Sunday, 10/17/10
 Start Time: End Time:
 Event Location: Same as Client
 Location:
 Address 1:
 Address 2:
 City:
 Phone:
 Room Name:
 Service Type:
 # Attendees:
 Tax Rate: 5.00%
 Manual Disc.:
 Additional Notes to be printed at end of Proposal/Contract:

Proposal Sections

Current Versions		Previous Versions	
Preview	Photo	Spelling	Reset
#	Name	Total	
1.A	Finishing Touches: Lit Art	\$210.00	

Total: \$210.00
 Deposit Required:

Proposal History

Version

- Home
- Calendar
- New
- Find
- Billing
- Inventory
- List
- Dupe
- Contract
- Pick List
- Delivery Report
- Flag Report
- Labels

Click List on the far right section of vertical tabs. - This will bring up all of the events with this name.

-As you can see there are 81 events with this as a theme

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Clients Vendors

Events/Proposals

Job #	Job Name	Client	Event Date	Agent	Agent 2	Status	Location	Active?	Actual
1	6456	Hollywood Promo for Shula's	Tidewater Productions	10/17/10		Event			\$210.00
2	6511	Golden Age of Hollywood - Glamorous	The Ritz Carlton - Tyson's Corner	10/19/10	Ted Rubis	Event	Ritz Carlton Tyson's Corner		\$14,990.00
3	6729	Hollywood Awards Night	Pure Dymonds Events	06/10/11		Event	The Lesner Inn in VA Beach		\$1,290.00
4	6818	A Night In Hollywood - Drop Off	Tarboro High School	05/14/11		Event	Nash Community College		\$1,855.00
5	6865	Hollywood Dance	Tomahawk Creek Middle School	06/03/11		Expired	The School	X	\$330.00
6	6866	Hollywood Red Carpet Prom	Severna Park High School	05/21/11	Ted Rubis	Event	BWI Marriott		\$3,882.00
7	7042	Hollywood Prom	Huguenot High School	05/13/11		Event	Science Museum of VA - rotunda		\$2,000.00
8	7060	Golden Age of Hollywood -	Capital City Events CCE	11/06/11	Ted Rubis	Proposal	Marriott Wardman Park		\$39,931.43
9	7090	Hollywood Mitzvah for Hannah and	Inspired Events by Kelly	10/15/11		Expired	Hilton Virginia Beach Oceanfront	X	
10	7456	Hollywood Homecoming	Woodrow Wilson High School DC	10/22/11		Event			\$2,892.50
11	7651	Hollywood Red Carpet Entrance Elements	Ridgewells Catering	01/20/12	Ted Rubis	Event	Meadowlark B-Gardens Atrium		\$2,362.64
12	7668	Hollywood Prom	Jamestown High School	04/21/12		Expired	Great Wolf Lodge	X	
13	7714	Hollywood Red Carpet Affair - Prom 2012	Northwestern High	05/24/12		Expired	Samual Riggs Alumni Center on the	X	\$6,985.50
14	7722	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22		Proposal			\$1,179.75
15	7725	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22	Ted Rubis	Proposal			\$2,516.25
16	7740	Hollywood Prom 2012	Camden County High School	05/05/12		Event	Camden County High School		\$3,065.00
17	7743	Hollywood Theme Events	PreCon Events	03/14/12	Ted Rubis	Event	Bethesda North Marriott SALON "C"		\$2,864.00
18	7755	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12		Expired		X	
19	7756	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12		Expired		X	\$4,331.25
20	7853	Hollywood Theme Events - Day 1	PreCon Events	03/13/12	Ted Rubis	Event	Bethesda North Marriott SALON "C"		\$3,602.13
21	7855	Awards/Hollywood Theme Rentals	Woodrow Wilson High School DC	02/29/12		Event	Woodrow Wilson High School DC		\$1,344.00
22	7933	Talent 'N' Training: Hollywood Nights Party USA Discounters (USA Living)		06/11/12		Event	Hilton Oceanfront, Virginia Beach		\$4,665.32

1 of 81 found
5,958 Total

Detail + - Standard Proposal Upload

You can order the list by the main headers at the top.

This allows you to review only proposals that match your clients budget or client type.

Important for the High School World.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Clients Vendors

Events/Proposals

	Job #	Job Name	Client	Event Date	Agent	Agent 2	Status	Location	Active?	Actual
← 1	7090	Hollywood Mitzvah for Hannah and	Inspired Events by Kelly	10/15/11			Expired	Hilton Virginia Beach Oceanfront	✗	
← 2	7668	Hollywood Prom	Jamestown High School	04/21/12			Expired	Great Wolf Lodge	✗	
← 3	7755	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12			Expired		✗	
← 4	7941	Hollywood Prom 2012		05/18/12			Expired		✗	
← 5	8878	Golden Age of Hollywood Holiday Pary	Wiley Rein LLP	12/10/13	Leslie Amason		Expired	Wiley Rein	✗	
← 6	8894	Reunion - Hollywood	Princess Anne High School	05/03/14	Leslie Amason		Expired	TBD	✗	
← 7	10905	PCMA - Old Hollywood	PCMA: Washington D.C. Chapter	11/21/16	Leslie Amason		Event	PCMA		\$0.00
← 8	10155	Hollywood Gala	ASK Childhood Cancer Foundation	09/13/15			Event			\$20.53
← 9	10657	Croaker's Spot Hollywood	Croaker's Spot	06/29/16			Proposal			\$136.89
← 10	6456	Hollywood Promo for Shula's	Tidewater Productions	10/17/10			Event			\$210.00
← 11	6865	Hollywood Dance	Tomahawk Creek Middle School	06/03/11			Expired	The School	✗	\$330.00
← 12	9280	Garthwell Goes Hollywood	Garth Newel Music Center	04/26/14			Expired		✗	\$508.60
← 13	8729	HOLLYWOOD THEME - USO - Drop Off	Sheraton Pentagon City Hotel	10/11/12	Ted Rubis		Expired	Sheraton National Hotel (Pentagon)	✗	\$931.55
← 14	11104	A Red Carpet Night In Hollywood Prom	Charles City County High School	05/05/17			Event	Eastern Henrico Rec Center		\$1,150.00
← 15	7985	Hollywood Red Carpet	Marriott - Key Bridge	06/15/12	Ted Rubis		Event	key Bridge Marriott - Hollywood Red		\$733.75
← 16	8711	Hollywood Theme Lighting	CSI - Capitol Services, Inc	05/21/13			Expired	Chesapeake DEF	✗	\$1,219.00
← 17	6729	Hollywood Awards Night	Pure Dymonds Events	06/10/11			Event	The Lesner Inn in VA Beach		\$1,290.00
← 18	7855	Awards/Hollywood Theme Rentals	Woodrow Wilson High School DC	02/29/12			Event	Woodrow Wilson High School DC		\$1,344.00
← 19	7722	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22			Proposal			\$1,179.75
← 20	12131	Hollywood Red Carpet Party	Chevy Chase Club	02/23/19	Ted Rubis		Proposal			\$1,477.50
← 21	10181	Hollywood Theme	John Champe High School	10/10/15	Emily Dearing		Event	John Champe		\$1,170.00
← 22	9038	Hollywood Homecoming	Gwynn Park High School	10/26/13			Expired	Gym at the High School	✗	\$1,810.00

10 of 81 found
5,956 Total

Detail + - Standard Proposal Upload

Going to review #22
Hollywood Homecoming

Click on the blue arrow >

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Clients Vendors

Events/Proposals

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←	3	7755	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12		Expired		✗	
←	4	7941	Hollywood Prom 2012		05/18/12		Expired		✗	
←	5	8878	Golden Age of Hollywood Holiday Pary	Wiley Rein LLP	12/10/13	Leslie Amason	Expired	Wiley Rein	✗	
←	6	8894	Reunion - Hollywood	Princess Anne High School	05/03/14	Leslie Amason	Expired	TBD	✗	
←	7	10905	PCMA - Old Hollywood	PCMA: Washington D.C. Chapter	11/21/16	Leslie Amason	Event	PCMA		\$0.00
←	8	10155	Hollywood Gala	ASK Childhood Cancer Foundation	09/13/15		Event			\$20.53
←	9	10657	Croaker's Spot Hollywood	Croaker's Spot	06/29/16		Proposal			\$136.89
←	10	6456	Hollywood Promo for Shula's	Tidewater Productions	10/17/10		Event			\$210.00
←	11	6865	Hollywood Dance	Tomahawk Creek Middle School	06/03/11		Expired	The School	✗	\$330.00
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←	14	11104	A Red Carpet Night In Hollywood Prom	Charles City County High School	05/05/17		Event	Eastern Henrico Rec Center		\$1,150.00
←	15	7985	Hollywood Red Carpet	Marriott - Key Bridge	06/15/12	Ted Rubis	Event	key Bridge Marriott - Hollywood Red		\$733.75
←	16	8711	Hollywood Theme Lighting	CSI - Capitol Services, Inc	05/21/13		Expired	Chesapeake DEF	✗	\$1,219.00
←	17	6729	Hollywood Awards Night	Pure Dymonds Events	06/10/11		Event	The Lesner Inn in VA Beach		\$1,290.00
←	18	7855	Awards/Hollywood Theme Rentals	Woodrow Wilson High School DC	02/29/12		Event	Woodrow Wilson High School DC		\$1,344.00
←	19	7722	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22		Proposal			\$1,179.75
←	20	12131	Hollywood Red Carpet Party	Chevy Chase Club	02/23/19	Ted Rubis	Proposal			\$1,477.50
←	21	10181	Hollywood Theme	John Champe High School	10/10/15	Emily Dearing	Event	John Champe		\$1,170.00
←	22	9038	Hollywood Homecoming	Gwynn Park High School	10/26/13		Expired	Gym at the High School	✗	\$1,810.00

10 of 81 found
5,956 Total

Detail + - Standard Proposal Upload

Click on
Proposal Tab

To review the items that
were on the proposal

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find Agent Agent 2

Client **Gwynn Park High School** Contact 1 Ira Jarrette Contract History Record Date Active?

Contact Greer Curry 03/13/13 Title HC 2013 10975 05/19/17 10/17/13 [X]

Email greer.curry@pgcps.org Phone/Fax Email ira.jarrette@pgcps.org 7645 05/17/12

Address 1 13800 Brandywine Road Contract Status

Address 2 City Brandywine MD 20613 USA Contact Proposal

Phone/Fax 301-372-0140 Title Event

URL Email Expired

Contract Out

Job # 9038 Event Name Hollywood Homecoming Preferred Contact Method Agent Activity Level Not Happening

Event Date Saturday, 10/26/13 Start Time 7:00 PM End Time 11:00 PM Service Type Marketing Cue

Location Gym at the High School No Payment

Notes Event Information Schedule Proposal Event Activities Accounting Map

Home

Calendar

New

Find

Billing

Inventory

List

Dupe

Contract ?

Pick List

Delivery Report

Flag Report

Labels

Under the 'Current Versions' Section

Click the blue arrow next to the first section '1.A'

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find Agent Agent 2

Client **Gwynn Park High School**

Contact Greer Curry 03/13/13
Email greer.curry@pgcps.org
Address 1 13800 Brandywine Road
Address 2
City Brandywine MD 20613 USA
Phone/Fax 301-372-0140
URL

Contact 1 Ira Jarrette
Title HC 2013
Phone/Fax
Email ira.jarrette@pgcps.org

Contact 2
Title
Phone/Fax
Email

Contract History
10975 05/19/17
7645 05/17/12

Record Date 10/17/13 Active?

Status
 Proposal
 Event
 Expired

Contract
 Out
 In
 In with Deposit

Job # 9038 Event Name Hollywood Homecoming Preferred Contact Method
Event Date Saturday, 10/26/13 Start Time 7:00 PM End Time 11:00 PM Service Type How did Client find Ampa?
Location Gym at the High School Agent Activity Level Not Happening Marketing Cue
No Payment

Notes Event Information Schedule Proposal Event Activities Accounting Map

Event Date Saturday, 10/26/13 Start Time 7:00 PM End Time 11:00 PM
Event Location Same as Client
Location Gym at the High School
Address 1
Address 2
City
Phone
Room Name
Service Type
Attendees
Tax Rate
Manual Disc.
Additional Notes to be printed at end of Proposal/Contract:

Proposal Sections

Current Versions			Previous Versions		
Preview	Photo	Spelling	Reset		
#	Name	Total			
1.A	Gold Men and Columns	\$950.00			
2.A	Hollywood St Signs and	\$110.00			
3.A	Delivery	\$750.00			
Total		\$1,810.00			
Deposit Required					

Proposal History

Version
10/17/13 2:27 PM

Home
Calendar
New
Find
Billing
Inventory
List
Dupe
Contract
Pick List
Delivery Report
Flag Report
Labels

A New Window Opens on top of the Job Page

You review here what inventory items are on the proposal.

RED — means there is an issue. Repair
* Sub Rental * Build * Buy

BLUE — means there is a conflict with another job

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 9038.1.A - CURRENT DEFINITIVE VERSION Unlock

Job # 9038 Job Name **Hollywood Homecoming** Client Name Gwynn Park High School

Section # 1 Rev. A Section Header Gold Men and Columns

Narrative Description

Item Filter

Item	Description Display	Flag? Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Statue: Award Gold Man	Short Long	<input type="checkbox"/> <input type="checkbox"/>	7ft	silver	350.00	<input checked="" type="checkbox"/>	350.00	2		\$700.00
Column with Movie Clapboard Kit	Short Long	<input type="checkbox"/> <input type="checkbox"/>	2x11'		125.00	<input checked="" type="checkbox"/>	125.00	2		\$250.00

Dramatic element at over 11ft tall. These heavy duty columns have a Clapboard shooting out to the top.

Notes

Created by: Ampa MacPro2
10/17/13
Modified by: Ted Rubis
04/21/16

Total **\$950.00**
Tax
Discount
Grand Total **\$950.00**

Sections for Job # 9038

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00

Total **\$1,810.00**

Definitive Revision for Section #1, Gold Men and Columns
 A

Section Sort Order for Job # 9038

Printout Sort Order

1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

To review the individual inventory item click the blue arrow next to the object (Gold Man)

Section Detail

File Edit View Insert Format Records Scripts Window Help



SECTION 9038.1.A - CURRENT DEFINITIVE VERSION Unlock

Job # 9038 Job Name **Hollywood Homecoming** Client Name Gwynn Park High School

Section # 1 Rev. A Section Header Gold Men and Columns

Narrative Description

Item Filter

Item	Description Display	Flag? Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
 Statue: Award Gold Man	<input type="radio"/> Short <input type="radio"/> Long	<input type="checkbox"/> <input type="checkbox"/>	7ft	silver	350.00	<input checked="" type="checkbox"/>	350.00	2		\$700.00
 Column with Movie Clapboard Kit	<input type="radio"/> Short <input type="radio"/> Long	<input type="checkbox"/> <input type="checkbox"/>	2x11'		125.00	<input checked="" type="checkbox"/>	125.00	2		\$250.00

Dramatic element at over 11ft tall. These heavy duty columns have a Clapboard shooting out to the top.

Notes

Created by: Ampa MacPro2
10/17/13
Modified by: Ted Rubis
04/21/16

Total **\$950.00**
Tax
Discount
Grand Total **\$950.00**

Sections for Job # 9038

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00

Total **\$1,810.00**

Definitive Revision for Section #1, Gold Men and Columns
 A

Section Sort Order for Job # 9038

Printout Sort Order

1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

This opens the inventory window.

Note the status along the top states 'Repair'

Reading the Description we can determine whether a Work Order needs to be generated to ensure quantity for this job.

Inventory Item

File Edit View Insert Format Records Scripts Window Help

New Dupe Form List Reports

Inventory Item In Stock Order Build Repair Rental

02045 Statue: Hollywood Award Gold Man

Item Type: Rental Price: 350.00
WH Location: Centerpiece Room 3 ("None" if 0) Qty: 8
Type/Category: Prop - large Weight: 15
Shelf #: CP3.2 WxHxD: 24 x 84 x 12
Color: silver/gold
Lock? Taxable? Revenue Type: Rental

Repair Description: 2 damaged past repair, 1(silver) needs repainting and has large dents, 2 needs minor paint touch up, 2 have minor cracks in the base and also need minor paint touch up, 1 in office, not counted in qty because it is the original

Proposal Description (Short): Proposal Description (long): Incomplete: photo-can we get a photo of this in silver?

Technical Requirements:

Manufacturer Serial #: Cost: 750.00 Kit? Parts: base / stand Instructions Text Instructions File

Vendor: Ampa shop Purchased:

Notes: Modification History Kit Notes

ChrisG 7/17/2019 - Confirmed Web Info cq paint carp

ChrisG 9/25/2017 - Confirmed

TrippM 8/29/17 - Website Prepared

ChrisG 7/10/2017 - QTY confirmed, repair status updated.
5 gold usable

Created on: Data Entry Complete? Active? Kit Only?

Enter data for Website

WEB Name	Gold Award Man	Inventory Edit Code	ca paint carp
CAT/NAV Name	Statues Hollywood Carpet Walkways	Install Time	
Separate Multiple with verticle line (!).		Weighting	100
Confirmed DATE	7/29/2014	Dim. Type	
Web Edit Code	17IZD WBZN	Width	24
Small Image	Award-Goldman Small.jpg	Height	84
Large Image	Award-Goldman Large.jpg. hollywood poplet.jpg	Depth	12
Web Note			
Description			

Design & Production Services

58.5451 ampaevents.com

Label Date: Home

Sections for Job # 9038

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00
Total		\$1,810.00

Definitive Revision for Section #1, Gold Men and Columns

Section Sort Order for Job # 9038

#	Name
1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

Printout Sort Order

#	Name
1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

Rate Tax? Rate Calc Quantity Disc. % Charge

Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
350.00	<input checked="" type="checkbox"/>	350.00	2		\$700.00
125.00	<input checked="" type="checkbox"/>	125.00	2		\$250.00

Total: \$950.00

Discount %: Tax: Grand Total: \$950.00

To Close the Inventory window – scroll down and click done.

Inventory Item

File Edit View Insert Format Records Scripts Window Help

WH Location: Centerpiece Room 3 ("None" if 0) Qty: 8
 Type/Category: Prop - large Weight: 15
 Shelf #: CP3.2 WxHxD: 24 x 84 x 12
 Color: silver/gold
 Lock? Taxable? Revenue Type: Rental

Repair Description: 2 damaged past repair, 1(silver) needs repainting and has large dents, 2 needs minor paint touch up, 2 have minor cracks in the base and also need minor paint touch up, 1 in office, not counted in qty because it is the original

Proposal Description (Short):
 Proposal Description (long): Incomplete: photo-can we get a photo of this in silver?

Manufacturer Serial #:
 Cost: 750.00 Kit? Parts: base / stand
 Vendor: Ampa shop Purchased:
 Notes: Modification History Kit Notes
 ChrisG 7/17/2019 - Confirmed Web Info cq paint card
 ChrisG 9/25/2017 - Confirmed
 TrippM 8/29/17- Website Prepared
 ChrisG 7/10/2017 - QTY confirmed, repair status updated.
 5 gold usable

Created on: Data Entry Complete? Active? Kit Only?

Enter data for Website

WEB Name: Gold Award Man Inventory Edit Code: ca paint card
 CAT/NAV Name: Statues|Hollywood|Carpet Walkways
 Confirmed DATE: 7/29/2014
 Web Edit Code: 17IZD WBZN
 Small Image: Award-Goldman_Small.jpg
 Large Image: Award-Goldman_Large.jpg, hollywood_popup.jpg
 Description:
 Dim. Type: Width: 24, Height: 84, Depth: 12

1 of 1 found, 8,652 Total History Labels Done

Design & Production Services

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Sections for Job # 9038

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00
Total		\$1,810.00

Section Sort Order for Job # 9038

#	Name
1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

Grand Total: \$950.00

Back on the Section Detail from the proposal.

Go to the bar on the far right and click the arrow next to the section you wish to view next.

We went from Gold Men to Hollywood Signs

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 9038.2.A - CURRENT DEFINITIVE VERSION Unlock

Job # 9038 Job Name **Hollywood Homecoming** Client Name Gwynn Park High School

Section # 2 Rev. A Section Header Hollywood St Signs and Rope and Stanchion

Narrative Description

Item Filter

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Hollywood Street Signs	<input checked="" type="radio"/> Short <input type="radio"/> Long	<input type="checkbox"/>	<input type="checkbox"/>	24X6	Green	25.00	<input checked="" type="checkbox"/>	25.00	2		\$50.00
Rope and Stanchion - 5ft Aluminum	<input checked="" type="radio"/> Short <input type="radio"/> Long	<input type="checkbox"/>	<input type="checkbox"/>			15.00	<input checked="" type="checkbox"/>	15.00	4		\$60.00

Notes

Created by: Ampa MacPro2
10/17/13
Modified by: Ted Rubis
04/21/16

Total **\$110.00**

Discount %

Tax

Discount

Grand Total **\$110.00**

Sections for Job # 9038

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00

Click to view Workorder #

Total **\$1,810.00**

Definitive Revision for Section #2, Hollywood St Signs and Rope and Stanchion

A

Section Sort Order for Job # 9038

Printout Sort Order

1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

Click DONE to return to the Job Page.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 9038.2.A - CURRENT DEFINITIVE VERSION Unlock

Job # 9038 Job Name **Hollywood Homecoming** Client Name Gwynn Park High School

Section # 2 Rev. A Section Header Hollywood St Signs and Rope and Stanchion

Narrative Description

Item Filter Find

Item	Description Display	Flag? Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Hollywood Street Signs	<input checked="" type="radio"/> Short <input type="radio"/> Long	<input type="checkbox"/> <input type="checkbox"/>	24X6	Green/	25.00	<input checked="" type="checkbox"/>	25.00	2		\$50.00
Rope and Stanchion - 5ft Aluminum	<input checked="" type="radio"/> Short <input type="radio"/> Long	<input type="checkbox"/> <input type="checkbox"/>			15.00	<input checked="" type="checkbox"/>	15.00	4		\$60.00

Notes

Created by: Amps MacPro2 10/17/13
Modified by: Ted Rubis 04/21/16

Total **\$110.00**
Tax
Discount
Grand Total **\$110.00**

Done Photo Proposal Test Photo Proposal PDF

Sections for Job # 9038

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00

Total **\$1,810.00**

Definitive Revision for Section #2, Hollywood St Signs and Rope and Stanchion

A

Section Sort Order for Job # 9038

Printout Sort Order

1.A	Gold Men and Columns
2.A	Hollywood St Signs and
3.A	Delivery

Click Home to return to the main page.

You can also click ctrl or command +2.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find

Client: **Gwynn Park High School** Agent: Agent 2

Contact: Greer Curry 03/13/13 Title: HC 2013 Contract History: 10975 05/19/17, 7645 05/17/12 Record Date: 10/17/13 Active?

Email: greer.curry@pgcps.org Phone/Fax: Email: ira.jarrette@pgcps.org Status: Proposal, Event, Expired

Address 1: 13800 Brandywine Road Address 2: City: Brandywine MD 20613 USA Title: Contract: Out, In, In with Deposit

Phone/Fax: 301-372-0140 Phone/Fax: URL: Email:

Job # 9038 Event Name: Hollywood Homecoming Preferred Contact Method: How did Client find Ampa? Agent Activity Level: Not Happening Marketing Cue: No Payment

Event Date: Saturday, 10/26/13 Start Time: 7:00 PM End Time: 11:00 PM Service Type: Location: Gym at the High School

Notes | Event Information | Schedule | Proposal | Event Activities | Accounting | Map

Event Date: Saturday, 10/26/13 Start Time: 7:00 PM End Time: 11:00 PM Proposal Sections: Current Versions, Previous Versions

#	Name	Total
1.A	Gold Men and Columns	\$950.00
2.A	Hollywood St Signs and	\$110.00
3.A	Delivery	\$750.00

Proposal History: Version 10/17/13 2:27 PM

Event Location: Same as Client Location: Gym at the High School Address 1: Address 2: City: Phone: Room Name: Service Type: # Attendees: Tax Rate: Manual Disc.: Additional Notes to be printed at end of Proposal/Contract:

Total: \$1,810.00 Deposit Required:

Home, Calendar, New, Find, Billing, Inventory, List, Dupe, Contract, Pick List, Delivery Report, Flag Report, Labels

Clients and Territory

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory Clients Vendors

MAIN MENU

JobCharge Customized for:

ampa events
6701 JANWAY RD
HENRICO, VA 23228

EnglishComp

Active Jobs				Active Proposals			Reconciliation		
Job #	Inv?	Job Name	Type	Client	Date	Time	Location	Agent	
12404	<input checked="" type="checkbox"/>	Office Decor	Design &	King & Spalding	12/02/19	3:00 PM		Heather Ernst	
12675	<input checked="" type="checkbox"/>	Holiday Party - DAY 1		Quad C	12/10/19	7:00 PM	The Dairy Barn at Verdant Lawn	Ted Rubis	
12682	<input checked="" type="checkbox"/>	Winter Holiday Party		Capital City Events CCE	12/20/19	1:00 AM	2553 Dulles View Drive, Herndon	Ted Rubis	
12692	<input checked="" type="checkbox"/>	Holiday Party - DAY 2		Quad C	12/20/19		The Dairy Barn at Verdant Lawn	Ted Rubis	
12703	<input checked="" type="checkbox"/>	Santa Photo Op	Rental w/	Strauss Marketing PR	12/21/19	3:00 PM	N. Bethesda Market Plaza,	Leslie Amason	
12730	<input type="checkbox"/>	Additional Equipment TBD		Strauss Marketing	12/21/19	3:00 PM	N. Bethesda Market Plaza	Leslie Amason	
12685	<input checked="" type="checkbox"/>	New Year's Eve	Rental w/	Hilton Norfolk The Main	12/30/19		Hilton Norfolk The Main	Heather Ernst	
12701	<input checked="" type="checkbox"/>	Gatzby Roaring 20s	Rental w/	Drive Shack	12/31/19		Drive Shack	Ted Rubis	
12706	<input checked="" type="checkbox"/>	Wardman Park Marriott		American University	01/02/20		Wardman Park Marriott	Ted Rubis	
12721	<input checked="" type="checkbox"/>	Lounge Furniture: Exec	Rental w/	Mars Inc (M&M Mars Head	01/06/20		Mars Inc (M&M Mars Head	Ted Rubis	
12621	<input checked="" type="checkbox"/>	Havana Nights	Rental w/	CIS Secure Computing	01/11/20	6:00 PM	WESTFIELD MARRIOTT	Ted Rubis	
12709	<input checked="" type="checkbox"/>	Hollywood Theme Club		Army Navy Country Club	01/12/20	6:30 PM	Army Navy Country Club	Ted Rubis	
12639	<input checked="" type="checkbox"/>	Gala 2020	Pick Up	The Paramount Theater	01/24/20		The Paramount Theater	Leslie Amason	
12509	<input checked="" type="checkbox"/>	Mardi Gras	Design &	Chesapeake Regional	01/25/20		Ches Convention Center	Ted Rubis	
12671	<input checked="" type="checkbox"/>	Sequins & Spurs		Montpelier Center for Arts	02/22/20	6:30 PM	Montpelier Center for Arts	Jane Raine	
12695	<input checked="" type="checkbox"/>	Captain's Ball		CNU - Christopher Newport	02/22/20		Student Union Lobby, Ballroom,	Leslie Amason	
12332	<input checked="" type="checkbox"/>	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Heather Ernst	

Click Clients
or
ctrl / command
+ 4


JobCharge (FM17s-Mac-mini.local)


File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory Clients Vendors

MAIN MENU

JobCharge Customized for:

 **AMPA EVENTS**
6701 JANWAY RD
HENRICO, VA 23228

 EnglishComp

Active Jobs			Active Proposals			Reconciliation		
Job #	Inv?	Job Name	Type	Client	Date	Time	Location	Agent
12404	<input checked="" type="checkbox"/>	Office Decor	Design &	King & Spalding	12/02/19	3:00 PM		Heather Ernst
12675	<input checked="" type="checkbox"/>	Holiday Party - DAY 1		Quad C	12/10/19	7:00 PM	The Dairy Barn at Verdant Lawn	Ted Rubis
12682	<input checked="" type="checkbox"/>	Winter Holiday Party		Capital City Events CCE	12/20/19	1:00 AM	2553 Dulles View Drive, Herndon	Ted Rubis
12692	<input checked="" type="checkbox"/>	Holiday Party - DAY 2		Quad C	12/20/19		The Dairy Barn at Verdant Lawn	Ted Rubis
12703	<input checked="" type="checkbox"/>	Santa Photo Op	Rental w/	Strauss Marketing PR	12/21/19	3:00 PM	N. Bethesda Market Plaza,	Leslie Amason
12730	<input type="checkbox"/>	Additional Equipment TBD		Strauss Marketing	12/21/19	3:00 PM	N. Bethesda Market Plaza	Leslie Amason
12685	<input checked="" type="checkbox"/>	New Year's Eve	Rental w/	Hilton Norfolk The Main	12/30/19		Hilton Norfolk The Main	Heather Ernst
12701	<input checked="" type="checkbox"/>	Gatsby Roaring 20s	Rental w/	Drive Shack	12/31/19		Drive Shack	Ted Rubis
12706	<input checked="" type="checkbox"/>	Wardman Park Marriott		American University	01/02/20		Wardman Park Marriott	Ted Rubis
12721	<input checked="" type="checkbox"/>	Lounge Furniture: Exec	Rental w/	Mars Inc (M&M Mars Head	01/06/20		Mars Inc (M&M Mars Head	Ted Rubis
12621	<input checked="" type="checkbox"/>	Havana Nights	Rental w/	CIS Secure Computing	01/11/20	6:00 PM	WESTFIELD MARRIOTT	Ted Rubis
12709	<input checked="" type="checkbox"/>	Hollywood Theme Club		Army Navy Country Club	01/12/20	6:30 PM	Army Navy Country Club	Ted Rubis
12639	<input checked="" type="checkbox"/>	Gala 2020	Pick Up	The Paramount Theater	01/24/20		The Paramount Theater	Leslie Amason
12509	<input checked="" type="checkbox"/>	Mardi Gras	Design &	Chesapeake Regional	01/25/20		Ches Convention Center	Ted Rubis
12671	<input checked="" type="checkbox"/>	Sequins & Spurs		Montpelier Center for Arts	02/22/20	6:30 PM	Montpelier Center for Arts	Jane Raine
12695	<input checked="" type="checkbox"/>	Captain's Ball		CNU - Christopher Newport	02/22/20		Student Union Lobby, Ballroom,	Leslie Amason
12332	<input checked="" type="checkbox"/>	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Heather Ernst

Click Sort
button at
bottom

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

Show Active Only

Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact	Contact Phone	Contact Cell Phone	Active?	Keep?	Agent	Ag
1	00153	AIPLFHospitality for ABA LI/LO	High School -	ISES MD	NOVA	Not for Profit	703-412-4357		Iris Howell	703-415-0780	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
2	01784	Company 20					212.461.4083 /212-784	212-967-2590	Karen Caccese	212-784-6452	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
3	01966	CSI - Capitol Services, Inc	DMC	Planner	DC	Planner	703.584.2460	703.584.2461	Nicole Cozier		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	Le
4	02719	Federal Reserve Bank of Richmond	Government	PCMA	Richmond/Peter	PCMA	804-697-8159		Bonnie G. Falls	697-8114	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
5	04891	Midlothian High School	High School -	School	Richmond/Peter	HighSchool	804.378.2440		Jennifer Weir		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
6	07566	Tidewater Productions	Partner				412-965-4948		Ken Carmichael	757 628-6482	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
7	08416	Weinstein JCC	Non-profit		VA	Non-Profit	804 545 8608		Debbie Newman	545-8645	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Ell
8	08733	GEP Washington-Millennium Challenge Corp	DMC		DC		202-777-7800	x	Allison Bishop		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
9	08736	USS Theodore Roosevelt	Military				757 443-7868		Helly Behardt	850-529-9925	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	He
10	08737	Design Cuisine	Caterers	Internally	NOVA		703-979-9400	703-979-8632	Sara Giraldo	703-979-9400	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	Le
11	08738	USS Enterprise	Military				757 444-4938		Monica Connon	757 444-4938	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
12	08745	The Republic of Venezuela					(202) 342-2214	(202) 342-5820			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
13	08747	The Fairfax Hotel at Embassy Row	Venue: Historic	Hotel	DC	Venue: hotel	(202) 293-2100		Beatrice Baskerville		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
14	08748	The Madison - Hilton Hotel	Hotel	Hotel	DC	Venue: hotel	(202) 862-1600		Jessica Barnes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
15	08750	National Building Museum	Museum	Internally	DC	Not for Profit	202.272.2448		Chris Frame		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	He
16	08759	Blackdog Catering Company	Caterers				757 857-6734				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Leslie Amason	
17	08760	The Bellwood Club at the Defense Logistics Agency	Social /	Venue	Richmond/Peter	Social /	804-279-3772	804-279-5022	Delta Lambert	804-279-3772	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	Le

1 of 15,794 found
15,794 Total

Detail Sort Standard Client List Export Contacts Labels

Choose the item
you wish to sort
by to locate
territory.

The screenshot shows the JobCharge software interface. The main window displays a list of clients under the 'Clients' tab. A 'Sort Records' dialog box is open, allowing the user to select a field to sort by. The dialog box includes a list of fields, a 'Sort Order' section with radio buttons for 'Ascending order', 'Descending order', and 'Custom order based on value list', and a 'Keep records in sorted order' checkbox.

Sort Records Dialog Box:

- Current Layout ("Clients_List User")
- Fields: @@, ##, Active?, Agent_1_#, Agent_1_Name, Agent_2_Name, Client_#, Client_Category, Client_List
- Sort Order: Ascending order (selected), Descending order, Custom order based on value list
- Options: Reorder based on summary field, Override field's language for sort
- Buttons: Unsort, Sort, Cancel
- Checkbox: Keep records in sorted order

Clients List:

Client #	Client Name	Client Type	Contact Phone	Contact Cell Phone	Active?	Keep?	Agent					
1	00153	AIPLFHospitalty for ABA LMO	High School -	703-415-0780	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
2	01784	Company 20		212-784-8452	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
3	01986	CSI - Capitol Services, Inc	DMC		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
4	02719	Federal Reserve Bank of Richmond	Government	703-499-5402	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis					
5	04891	Midlothian High School	High School -	897-8114	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
6	07566	Tidewater Productions	Partner		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
7	08416	Weinstein JCC	Non-profit	757 628-6482	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis					
8	08733	GEP Washington-Millennium Challenge Corp	DMC	545-8645	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
9	08736	USS Theodore Roosevelt	Military		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis					
10	08737	Design Cuisine	Caterers	850-529-9925	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
11	08738	USS Enterprise	Military	703-979-9400	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis					
12	08745	The Republic of Vonezuela			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
13	08747	The Fairfax Hotel at Embassy Row	Venue: Historic		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
14	08748	The Madison - Hilton Hotel	Hotel		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
15	08750	National Building Museum	Museum		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
16	08759	Blackdog Catering Company	Caterers	757 857-8734	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Leslie Amason					
17	08760	The Bellwood Club at the Defense Logistics Agency	Social / Venue	Richmond/Peter Social /	804-279-3772	804-279-5022	Debra Lambert	804-279-3772	804-399-5179	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis

Double click the item to add it to the sort order

Sort Records ✕

Current Layout ("Clients_List User") ▾

- Agent_1_Name
- Agent_2_Name
- Client_#
- Client_Category
- Client_List
- Client_Name
- Client_Region
- Client_Type
- Contact

Sort Order

✚ Client_Type .|

Clear All

Move

Ascending order

Descending order

Custom order based on value list <unknown> ▾

Reorder based on summary field Specify ...

Override field's language for sort English ▾

Keep records in sorted order

Unsort Sort Cancel

You can sort by multiple items.

Sort Records

Current Layout ("Clients_List User")

- Client_Category
- Client_List
- Client_Name
- Client_Region
- Client_Type
- Contact
- Find...
- Keep?
- Phone_Fax

Sort Order

- Client_Type
- Client_Region

Clear All

Move

Ascending order

Descending order

Custom order based on value list <unknown>

Reorder based on summary field Specify ...

Override field's language for sort English

Keep records in sorted order

Unsort Sort Cancel

To search for ALL clients you need to search from this area. If you search from a job or event page your search returns will be limited to Clients that have Events or Proposals.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

Clients

Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact
← 8248 20856	Maryland Country Caterers	Caterers	Internally	MD		301-855-2771		David Benson
← 8249 20870	Forum Caterers	Caterers	Internally	MD		410-358-1101		Brian Haysbert
← 8250 20872	Manor Tavern	Caterers	Internally	MD		410-771-8155		Terry Lombardi
← 8251 20944	Palate Pleasers	Caterers	Internally	MD		410-263-6941		Sally Kaiser
← 8252 22563	Town and Country	Caterers	Venue	MD	Venue: other	301-572-7744		Breanna Hall
← 8253 22582	Kens Creative Catering	Caterers	Client called Us	MD	Venue: other	410-268-3222		Ken Upton
← 8254 08880	La Prima Catering	Caterers	Internally	MD DC West		301-220-1001	301 220 4489	Steve Jerrick
← 8255 09753	SUSAN GAGE CATERING	Caterers	Internally	MD DC West		301-839-6900		Chappall Gage
← 8256 11829	The Strathmore	Caterers	Internally	MD DC West		301-581-5225		Augie Bove
← 8257 16124	The Sunset Room by Wolfgang Puck (Catering) -	Caterers	SESMA Dinner	MD Rivers and	Caterer	301 839 1805		Francesca Louis
← 8258 12165	Magnolia Grille/Catering Connection	Caterers		NC		252-475-9787		
← 8259 15652	FDY INC.	Caterers	TSE 2012	NC - Charlotte		704-330-1446	704 330 1445	Chacara Evans
← 8260 12152	11th Hour Events	Caterers	OBX Wedding	NC - East	Social /	252 473-5000		Rachel Moser
← 8261 12155	Beach Ball Events	Caterers	OBX Wedding	NC - East		252 473-4993		Linda Bradley
← 8262 12157	Coastal Provisions Market and Catering	Caterers	OBX Wedding	NC - East		252 480-0023		Nina Foster
← 8263 12158	Good Life Gourmet and Catering	Caterers	OBX Wedding	NC - East		252 480-2855		Steve Mace
← 8264 12161	Queen Anne's Events	Caterers	OBX Wedding	NC - East		252 423-1295		

11,834 of 15,794 found
15,794 Total

Detail + - Sort Standard Client List Export Contacts Labels

At Ampa we track all outreach activities to clients.

This helps track your goals and keep your co-workers up to date for future outreach.

Client 8253 – click arrow

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

Clients

←	Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact
←	8248	20856	Maryland Country Caterers	Caterers	Internally	MD	301-855-2771		David Benson
←	8249	20870	Forum Caterers	Caterers	Internally	MD	410-358-1101		Brian Haysbert
←	8250	20872	Manor Tavern	Caterers	Internally	MD	410-771-8155		Terry Lombardi
←	8251	20944	Palate Pleasers	Caterers	Internally	MD	410-263-6941		Sally Kaiser
←	8252	22563	Town and Country	Caterers	Venue	MD	Venue: other	301-572-7744	Breanna Hall
←	8253	22582	Kens Creative Catering	Caterers	Client called Us	MD	Venue: other	410-268-3222	Ken Upton
←	8254	08880	La Prima Catering	Caterers	Internally	MD DC West	301-220-1001	301 220 4489	Steve Jerrick
←	8255	09753	SUSAN GAGE CATERING	Caterers	Internally	MD DC West	301-839-6900		Chappall Gage
←	8256	11829	The Strathmore	Caterers	Internally	MD DC West	301-581-5225		Augie Bove
←	8257	16124	The Sunset Room by Wolfgang Puck (Catering) -	Caterers	SESMA Dinner	MD Rivers and	Caterer	301 839 1805	Francesca Louis
←	8258	12165	Magnolia Grille/Catering Connection	Caterers		NC	252-475-9787		
←	8259	15652	FDY INC.	Caterers	TSE 2012	NC - Charlotte	704-330-1446	704 330 1445	Chacara Evans
←	8260	12152	11th Hour Events	Caterers	OBX Wedding	NC - East	Social /	252 473-5000	Rachel Moser
←	8261	12155	Beach Ball Events	Caterers	OBX Wedding	NC - East	252 473-4993		Linda Bradley
←	8262	12157	Coastal Provisions Market and Catering	Caterers	OBX Wedding	NC - East	252 480-0023		Nina Foster
←	8263	12158	Good Life Gourmet and Catering	Caterers	OBX Wedding	NC - East	252 480-2855		Steve Mace
←	8264	12161	Queen Anne's Events	Caterers	OBX Wedding	NC - East	252 423-1295		

11,834 of 15,794 found
15,794 Total

Detail + - Sort Standard Client List Export Contacts Labels

You are calling
Ken Upton

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

CLIENTS Date: 10/12/2017

Client #	Client Name	General Phone	General Fax	Active?
22582	Kens Creative Catering	410-268-3222		<input checked="" type="checkbox"/>

Address: 980 Awald Rd
City: Annapolis State: MD Zip: 21401 Country: USA

Client Type: Caterers Client List: Client called Region: MD Category: Venue: other

Agent: Agent 2:

Contacts

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Ken	Upton				10/12/2017	ken@kenscreative kitchen.	<input type="checkbox"/> <input checked="" type="checkbox"/>

Client Jobs Tax Rate: 5.3%

Job #	Date	Job Name	Notes

8,253 of 15,794 found
15,794 Total

List + - Client List View Legacy Record

Correspondence/Activities

Date	Activity	Employee
10/12/17	Meeting	
10/12/17	Phone Call	
10/11/17	Phone Call	

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

CLIENTS Date: 10/12/2017

Client #	Client Name	General Phone	General Fax	Active?
22582	Kens Creative Catering	410-268-3222		<input checked="" type="checkbox"/>
Address		Client Type	Client List	Region
980 Awald Rd		Caterers	Client called	MD
City	State	Zip	Country	Category
Annapolis	MD	21401	USA	Venue: other
URL		Agent	Agent 2	

Contacts

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Ken	Upton				10/12/2017	ken@kenscreative kitchen.	<input type="checkbox"/>

Correspondence/Activities

Date	Activity	Employee
10/12/17	Meeting	
10/12/17	Phone Call	
10/11/17	Phone Call	

Client Jobs Tax Rate: 5.3%

Job #	Date	Job Name	Notes

8,253 of 15,794 found
15,794 Total

List + - Client List View Legacy Record

Notes Comments

Click on the date space next to the arrow.

Enter Date

Note that when you enter the date the cursor advances to the activity and auto-fills your name.

The screenshot shows the JobCharge software interface. The main window is titled "JobCharge (FM17s-Mac-mini.local)" and has a menu bar with "File", "Edit", "View", "Insert", "Format", "Records", "Scripts", "Window", and "Help". Below the menu bar are several tabs: "Home", "Main", "Legacy", "Calendar", "Schedule", "Admin", "Inventory", "Clients" (selected), and "Vendors".

The "CLIENTS" section is active, showing details for client "22582 Kens Creative Catering". The date is set to "10/12/2017". The client information includes:

- Client #: 22582
- Client Name: Kens Creative Catering
- General Phone: 410-268-3222
- General Fax: (empty)
- Active?:
- Address: 980 Awald Rd, Annapolis, MD 21401, USA
- Client Type: Caterers
- Client List: Client called
- Region: MD
- Category: Venue: other
- Agent: (empty)
- Agent 2: (empty)

The "Contacts" section shows a table with columns: First Name, Last Name, Title, Phone_General, Cell Phone, Date, Email, and Default?. One contact is listed: Ken Upton, 10/12/2017, ken@kenscreative kitchen.

The "Correspondence/Activities" section shows a table with columns: Date, Activity, and Employee. A dropdown menu is open over the "Activity" column, listing options: Letter, Form Letter, Email, Phone Call, Fax, Meeting, General Notes, Planning Time, VENDOR COST REPORT, Design Time, and Training Time. The first activity listed is "10/12/17 Meeting" by "Fleming, Elizabeth".

The "Client Jobs" section shows a table with columns: Job #, Date, Job Name, and Notes. The "Tax Rate" is set to 5.3%.

At the bottom of the window, there are navigation buttons: "List", "+", "-", "Client List", and "View Legacy Record". A status bar at the very bottom shows "8,253 of 15,794 found" and "15,794 Total".

Click blue arrow next to your activity.

The screenshot displays the JobCharge software interface for a client named 'Kens Creative Catering'. The main window is titled 'JobCharge (FM17s-Mac-mini.local)' and includes a menu bar (File, Edit, View, Insert, Format, Records, Scripts, Window, Help) and a navigation bar with buttons for Home, Main, Legacy, Calendar, Schedule, Admin, Inventory, Clients, and Vendors. The 'Clients' tab is active, showing a form for client details. The client information includes Client # 22582, Client Name 'Kens Creative Catering', General Phone 410-268-3222, and Address 980 Awald Rd, Annapolis, MD 21401, USA. The client type is 'Caterers' and the client list is 'Client called'. A 'Contacts' table lists Ken Upton as the primary contact. To the right, the 'Correspondence/Activities' panel shows a list of activities with a date and employee name. A dropdown menu is open over the activity dated 12/20/19 by Fleming, Elizabeth, listing options like Letter, Form Letter, Email, Phone Call, Fax, Meeting, General Notes, Planning Time, VENDOR COST REPORT, Design Time, and Training Time. At the bottom, there are navigation controls and a status bar showing '8,253 of 15,794 found' and '15,794 Total'.

Client #	Client Name	General Phone	General Fax	Active?
22582	Kens Creative Catering	410-268-3222		<input checked="" type="checkbox"/>

Address	Client Type	Client List	Region	Category
980 Awald Rd City: Annapolis State: MD Zip: 21401 Country: USA	Caterers	Client called	MD	Venue: other

Contacts	First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
<input checked="" type="checkbox"/>	Ken	Upton				10/12/2017	ken@kenscreative kitchen.	<input type="checkbox"/> <input checked="" type="checkbox"/>

Correspondence/Activities	Date	Activity	Employee
<input checked="" type="checkbox"/>	10/12/17	Meeting	
<input checked="" type="checkbox"/>	10/12/17	Phone Call	
<input checked="" type="checkbox"/>	10/11/17	Phone Call	
<input checked="" type="checkbox"/>	12/20/19		Fleming, Elizabeth

Client Jobs	Job #	Date	Job Name	Notes
<input checked="" type="checkbox"/>				

8,253 of 15,794 found
15,794 Total

List Client List View Legacy Record

Enter the details
of your
conversation.

Then click done.

The screenshot displays the JobCharge software interface, which is divided into several panels. The main window is titled "Client Activity" and has a menu bar with "File", "Edit", "View", "Insert", "Format", "Records", "Scripts", "Window", and "Help". Below the menu bar is a toolbar with navigation and action buttons. The interface is split into three main sections:

- Left Panel (JobCharge (FM17s-Mac-mir)):** Contains sections for "CLIENTS", "Contacts", and "Client Jobs".
 - CLIENTS:** Shows a table with columns "Client #" and "Client Name". The first entry is "22582 Kens Creati". Below this is the "Address" section with fields for "Address" (980 Awald Rd), "City" (Annapolis), and "URL".
 - Contacts:** Shows a table with columns "First Name" and "Last Name". The first entry is "Ken Upton".
 - Client Jobs:** Shows a table with columns "Job #", "Date", and "Job Name".
- Center Panel (Client Activity):** Displays "SALES ACTIVITY DETAIL" for a "Phone Call, 12/20/2019".
 - Fields include "Date" (12/20/2019), "Date Sent", "By" (Fleming, Elizabeth), "Description", "Job", and "Client" (Kens Creative Catering).
 - A large "Notes" text area is present below the form fields.
- Right Panel (Vendors):** Displays "Correspondence/Activities" as a table with columns "Date", "Activity", and "Employee".
 - Entries include: "12/20/19 Phone Call Fleming, Elizabeth", "10/12/17 Meeting", "10/12/17 Phone Call", and "10/11/17 Phone Call".

At the bottom of the interface, there are navigation arrows and a "Done" button. A status bar at the bottom left indicates "8,253 of 15,794 found" and "15,794 Total".

Emails can be sent directly from the system without a copy/paste.

The screenshot displays a software interface with two main windows. The left window, titled "Client Activity", is an email composition form. It includes fields for "Email Address", "CC", "Subject", and "Attachment", followed by a large "Message" text area. At the bottom, it shows "Date 12/20/2019", "Date Sent", "By Fleming, Elizabeth", and "Client Kens Creative". "Done" and "Send" buttons are at the bottom. The right window shows a "Clients" tab with a "Correspondence/Activities" table. The table has columns for "Date", "Activity", and "Employee".

Date	Activity	Employee
12/20/19	Email	Fleming, Elizabeth
10/12/17	Meeting	
10/12/17	Phone Call	
10/11/17	Phone Call	

Click
Clients

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

Show Active Only

Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact	Contact Phone	Contact Cell Phone	Active?	Keep?	Agent	Ag
15425 26804	Kurtz's Beach	Venue:		Maryland		410) 255-1280					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Xena Strench	
15426 26805	R. House	Venue:		MD		(443) 347-3570					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Xena Strench	
15427 26806	Aramark M&T Stadium	Venue: Other		MD		(410) 230-8080					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Xena Strench	
15428 26807	Wisp Resort	Venue:		Maryland		(301) 859-3159					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Xena Strench	
15429 26808											<input checked="" type="checkbox"/>	<input type="checkbox"/>	Xena Strench	
15430 26809	Lynsey Labrin			MD		407.826.0055		Lynsey Labrin			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Xena Strench	
15431 26810	Blessed Sacrament School	Private Schools	Cold Call	NOVA		703-998-4170		Kale Markey			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15432 26811	The Basilica School of Saint Mary	Private Schools	Cold Call	NOVA		703-549-1646		Ann Ross			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15433 26812	The Longwood Center for the Visual Arts	Non-profit				434-395-2206		Rachel Ivies			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Leslie Amason	
15434 26813	Washington and Lee University	College/Universi	Internally	VA - South	School	(540) 458-8400					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Leslie Amason	Te
15435 26814	Angelus Academy	Private Schools	Cold Call	NOVA		703-924-3996		BettyJo Lash			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15436 26815	Gravatt Entertainment					540-455-3383		Will Gravatt			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Heather Ernst	
15437 26816	St. Anthony of Padua Catholic School			NOVA		703-820-7111		Edward Andercheck			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15438 26817	St. Joseph School	Catholic PreK -	Cold Call	NOVA		703-880-4350		Monique Tuttle			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Leslie Amason	
15439 26818	Siena Academy	Private Schools	Cold Call	NOVA		703-759-4129					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15440 26819	All Saints Catholic School	Private Schools	Cold Call	NOVA		703-368-4400		Janis DeVore			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15441 26820	Urban One	Media PR				301-429-3200					<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	
15442 26821	Louisa	Corporation	Cold Call	Philadelphia		412-464-1957		Ron Mushinsky			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Karen DeMarino	

15,449 of 15,794 found
15,794 Total

Detail + - Sort Standard Client List Export Contacts Labels

Do a search for
'Goatopia'

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

Clients [Show](#)

	Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact	Contact Phone	Contac
← 1	26828	Goatopia	Live	Client called Us	Richmond/Peter				Beth Venable		

1 of 1 found
15,794 Total

Detail + - Sort Standard Client List Export Contacts Labels

You can review previous jobs or create a new job.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

CLIENTS Date 08/07/2019

Client #	Client Name	General Phone	General Fax	Active?
26828	Goatopia			<input checked="" type="checkbox"/>

Address

Client Type	Client List	Region	Category
Live	Client called	Richmond/Pet	

City State Zip Country

URL

Agent Agent 2

Elizabeth Fleming

Contacts

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Beth	Venable			8043566382	08/09/2019		<input type="checkbox"/> <input checked="" type="checkbox"/> -

Client Jobs Tax Rate 5.3%

Job #	Date	Job Name	Notes
12470	08/30/19	Test run of FM process	
12477	02/14/20	Training on Schedule and Calendar	
12588	10/31/19	Training for Keri	
12606	11/09/19	training for keri	
12693	11/29/19	Training of Theresa	

Correspondence/Activities

Date	Activity	Employee
11/25/19	Email	Fleming, Elizabeth
10/07/19	Email	Berry, Paige
08/20/19	Training Time	Fleming, Elizabeth
08/09/19	General Notes	Fleming, Elizabeth

1 of 1 found
15,794 Total

List + - Client List View Legacy Record

You can duplicate previous jobs or create a new job.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

CLIENTS Date 08/07/2019

Client #	Client Name	General Phone	General Fax	Active?
26828	Goatopia			<input checked="" type="checkbox"/>

Address

Client Type	Client List	Region	Category
Live	Client called	Richmond/Pet	

City State Zip Country

URL

Agent Agent 2

Elizabeth Fleming

Contacts

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Beth	Venable			8043566382	08/09/2019		<input type="checkbox"/> <input checked="" type="checkbox"/> -

Client Jobs Tax Rate 5.3%

Job #	Date	Job Name	Notes
12470	08/30/19	Test run of FM process	
12477	02/14/20	Training on Schedule and Calendar	
12588	10/31/19	Training for Keri	
12606	11/09/19	training for keri	
12693	11/29/19	Training of Theresa	

Correspondence/Activities

Date	Activity	Employee
11/25/19	Email	Fleming, Elizabeth
10/07/19	Email	Berry, Paige
08/20/19	Training Time	Fleming, Elizabeth
08/09/19	General Notes	Fleming, Elizabeth

1 of 1 found
15,794 Total

List + - Client List View Legacy Record

Duplication

Click the job you wish to duplicate.

The screenshot displays the JobCharge software interface for a client named 'Goatopia'. The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Scripts, Window, Help) and a toolbar with buttons for Home, Main, Legacy, Calendar, Schedule, Admin, Inventory, Clients (highlighted), and Vendors. The 'Clients' section shows details for client # 26828, including address, contact information, and a list of contacts. The 'Client Jobs' section lists several jobs, with the first one selected. The 'Correspondence/Activities' section shows a list of activities. The bottom of the interface features navigation buttons and a status bar.

CLIENTS Date: 08/07/2019

Client #	Client Name	General Phone	General Fax	Active?
26828	Goatopia			<input checked="" type="checkbox"/>

Address: _____ Client Type: Live Client List: Client called Region: Richmond/Pet Category: _____

City: _____ State: _____ Zip: _____ Country: USA

URL: _____ Agent: Elizabeth Fleming Agent 2: _____

Contacts

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Beth	Venable			8043566382	08/09/2019		<input type="checkbox"/> <input checked="" type="checkbox"/> -
							<input type="checkbox"/> <input checked="" type="checkbox"/> -

Client Jobs Tax Rate: 5.3%

Job #	Date	Job Name	Notes
12470	08/30/19	Test run of FM process	
12477	02/14/20	Training on Schedule and Calendar	
12588	10/31/19	Training for Keri	
12606	11/09/19	training for keri	
12693	11/29/19	Training of Theresa	

Correspondence/Activities

Date	Activity	Employee
11/25/19	Email	Fleming, Elizabeth
10/07/19	Email	Berry, Paige
08/20/19	Training Time	Fleming, Elizabeth
08/09/19	General Notes	Fleming, Elizabeth

1 of 1 found
15,794 Total

Navigation: << < > >> List + - Client List View Legacy Record

On the job you wish to duplicate click 'Records' across the top.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find Agent Elizabeth Fleming Agent 2

Client **Goatopia** Contact Beth Venable 08/09/19

Contact 1 Title Phone/Fax Email

Contact 2 Title Phone/Fax Email

Contract History

12477	02/14/20
12693	11/29/19
12606	11/09/19
12588	10/31/19
12740	08/30/19
12470	08/30/19

Record Date 12/20/19 Active?

Status Proposal Event Expired

Contract Out In In with Deposit

Job # 12740 Event Name Test run of FM process Preferred Contact Method

Event Date Friday, 08/30/19 Start Time 12:00 PM End Time 1:00 PM Service Type Rental w/ Install & Take Down

Location Goatopia Agent Activity Level Very Hot Marketing Cue No Payment

Notes Event Information Schedule Proposal Event Activities Accounting Map

Learning the process :)

Home Calendar New Find Billing Inventory List Dupe Contract Pick List Delivery Report Flag Report Labels

Chose duplicate record.

The screenshot shows the JobCharge (FM17s-Mac-mini.local) application window. The 'Records' menu is open, displaying the following options:

- New Record (Ctrl+N)
- Duplicate Record (Ctrl+D)
- Delete Record... (Ctrl+E)
- Delete All Records...
- Go to Record
- Refresh Window (Ctrl+Shift+R)
- Show All Records (Ctrl+J)
- Show Omitted Only
- Omit Record (Ctrl+T)
- Omit Multiple... (Ctrl+Shift+T)
- Modify Last Find (Ctrl+R)
- Saved Finds
- Sort Records... (Ctrl+S)
- Unsort
- Replace Field Contents... (Ctrl+=)
- Relookup Field Contents
- Revert Record...

The background interface includes a header for 'Production Services' and 'ampaevents.com'. The main area shows a record for 'Goatopia' with contact 'Beth Venable' and event name 'Test run of FM proce'. A 'Contract History' table is visible:

Contract	Record Date	Active?
12477	02/14/20	
12693	11/29/19	
12606	11/09/19	
12588	10/31/19	
12740	08/30/19	
12470	08/30/19	

The right sidebar contains navigation buttons: Home, Calendar, New, Find, Billing, Inventory, List, Dupe, Contract, Pick List, Delivery Report, Flag Report, and Labels.

When you return to client screen you will notice that the job has duplicated. #12740

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Clients Inventory Personnel Form Letters Legal Tech Riders Vendors Contacts Admin

CLIENTS

Date: 08/07/2019

Client #	Client Name	General Phone	General Fax	Active?
26828	Goatopia			<input checked="" type="checkbox"/>

Address Address 2 Client Type Client List Region Category

City State Zip Country

URL Agent Agent 2

View HS Home Legacy Record

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Beth	Venable		8043566382		08/09/2019		<input type="checkbox"/> <input checked="" type="checkbox"/>

Client Jobs

Tax Rate: 5.3%

Job #	Date	Job Name	Notes
12470	08/30/19	Test run of FM process	
12477	02/14/20	Training on Schedule and Calendar	
12588	10/31/19	Training for Keri	
12606	11/09/19	training for keri	
12693	11/29/19	Training of Theresa	
12740	08/30/19	Test run of FM process	

Correspondence/Activities

Date	Activity	Employee
11/25/19	Email	Fleming, Elizabeth
10/07/19	Email	Berry, Paige
08/20/19	Training Time	Fleming, Elizabeth
08/09/19	General Notes	Fleming, Elizabeth

1 of 1 found
15,794 Total

List + - Client List View Legacy Record

Now you have duplicated the previous job.

You must go into the proposal and review pricing and inventory in case there have been changes between jobs.

The screenshot displays the JobCharge software interface. At the top, the window title is "JobCharge (FM17s-Mac-mini.local)" and the menu bar includes "File Edit View Insert Format Records Scripts Window Help". The main header features the "Design & Production Services" logo, the phone number "800.358.5451", and the website "ampaevents.com".

The interface is divided into several sections:

- Client Information:** Client name "Goatopia", contact "Beth Venable", and date "08/09/19".
- Contact Information:** Fields for "Contact 1" and "Contact 2" with sub-fields for Title, Phone/Fax, and Email.
- Contract History:** A table listing contracts with columns for ID, Date, and Status. The table shows several entries, with the most recent being "12470" on "08/30/19".
- Status and Record Date:** "Record Date" is "12/20/19". The "Status" section has radio buttons for "Proposal" (selected), "Event", and "Expired".
- Event Details:** Job # "12740", Event Name "Changing Title", Event Date "Friday, 08/30/19", Start Time "12:00 PM", End Time "1:00 PM", and Service Type "Rental w/ Install & Take Down".
- Agent Information:** Agent "Elizabeth Fleming", Agent Activity Level "Very Hot", and Marketing Cue "No Payment" (highlighted in red).
- Navigation Tabs:** "Notes", "Event Information", "Schedule", "Proposal", "Event Activities", "Accounting", and "Map".
- Notes Section:** Contains the text "Learning the process :)"
- Right Sidebar:** A vertical menu of buttons including "Home", "Calendar", "New", "Find", "Billing", "Inventory", "List", "Dupe", "Contract", "Pick List", "Delivery Report", "Flag Report", and "Labels".

If you are starting a new job from scratch. Click the + sign above the previous jobs.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Clients Inventory Personnel Form Letters Legal Tech Riders Vendors Contacts Admin

CLIENTS

Date: 08/07/2019

Client #	Client Name	General Phone	General Fax	Active?
26828	Goatopia			<input checked="" type="checkbox"/>

Address Address 2 Client Type Client List Region Category

City State Zip Country

URL Agent Agent 2

View HS Home Legacy Record

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Beth	Venable		8043566382		08/09/2019		<input type="checkbox"/> <input checked="" type="checkbox"/>

Client Jobs

Tax Rate: 5.3%

Job #	Date	Job Name	Notes
12470	08/30/19	Test run of FM process	
12477	02/14/20	Training on Schedule and Calendar	
12588	10/31/19	Training for Keri	
12606	11/09/19	training for keri	
12693	11/29/19	Training of Theresa	
12740	08/30/19	Test run of FM process	

Correspondence/Activities

Date	Activity	Employee
11/25/19	Email	Fleming, Elizabeth
10/07/19	Email	Berry, Paige
08/20/19	Training Time	Fleming, Elizabeth
08/09/19	General Notes	Fleming, Elizabeth

1 of 1 found
15,794 Total

List + - Client List View Legacy Record

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find Agent Elizabeth Fleming Agent 2

Client **Goatopia** Contact Beth Venable 08/09/19

Contract History

Contract #	Date
12477	02/14/20
12741	12/20/19
12693	11/29/19
12606	11/09/19
12588	10/31/19
12740	08/30/19
12470	08/30/19

Record Date 12/20/19 Active?

Status

Proposal
 Event
 Expired

Contract

Out
 In
 In with Deposit

Job # 12741 Event Name New Event

Event Date Friday, 12/20/19 Start Time End Time Service Type

Location

Preferred Contact Method

How did Client find Ampa?

Agent Activity Level

Marketing Cue

No Payment

Notes Event Information Schedule Proposal Event Activities Accounting Map

Home
 Calendar
 New
 Find
 Billing
 Inventory
 List
 Dupe
 Contract
 Pick List
 Delivery Report
 Flag Report
 Labels

First Step is to fill in ALL the information about the event.

Client information needs to be filled in.

Then filling in the tabs.

Notes Section is for
IN HOUSE use.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Find Agent Elizabeth Fleming Agent 2

Client **Goatopia** Contact 1 Contact 2 Contract History Record Date Active?

Contact Beth Venable 08/09/19 Title 12477 02/14/20 12/20/19 [X]

Email Phone/Fax 12693 11/29/19 Status

Address 1 Email 12606 11/09/19 Proposal

Address 2 Contact 2 Title 12588 10/31/19 Event

City USA Title 12470 08/30/19 Expired

Phone/Fax Phone/Fax Contract

URL Email Out

Job # Event Name Preferred Contact Method

12741 New Event How did Client find Ampa?

Event Date Start Time End Time Service Type Agent Activity Level

Friday, 12/20/19 Location Marketing Cue

No Payment

Notes Event Information Schedule Proposal Event Activities Accounting Map

We use this section for any special notes IN HOUSE ONLY.

Notes to team members - Notes from preproduction - |

Home

Calendar

New

Find

Billing

Inventory

List

Dupe

Contract ?

Pick List

Delivery Report

Flag Report

Labels

The Schedule tab is where work orders as needed will be assigned.

If you have questions on the status of items ordered you can look in this section to see when and to who the task was assigned for your event.

The screenshot displays the JobCharge software interface for a 'New Event'. The window title is 'JobCharge (FM17s-Mac-mini.local)'. The top navigation bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Records', 'Scripts', 'Window', and 'Help'. The header features the phone number '800.358.5451' and the website 'ampaevents.com'. The main interface is divided into several sections:

- Client Information:** Client name 'Goatopia', contact 'Beth Venable' (08/09/19), and address details (City: USA).
- Agent Information:** Agent 'Elizabeth Fleming' (Agent 2).
- Contract History:** A table listing contracts with columns for ID and date.

Contract ID	Date
12477	02/14/20
12693	11/29/19
12606	11/09/19
12588	10/31/19
12470	08/30/19
- Status and Contract Options:** Record Date '12/20/19', Status options (Proposal, Event, Expired), and Contract options (Out, In, In with Deposit).
- Event Details:** Job # '12741', Event Name 'New Event', Event Date 'Friday, 12/20/19', and a 'No Payment' warning.
- Navigation Tabs:** Notes, Event Information, **Schedule**, Proposal, Event Activities, Accounting, Map.
- Schedule Table:** A table with columns for Start Date, End Date, Addl. Days, Type, Activity, Edit, Assigned To, Comment, and Complete?. The table is currently empty.
- Right Sidebar:** A vertical menu with buttons for Home, Calendar, New, Find, Billing, Inventory, List, Dupe, Contract, Pick List, Delivery Report, Flag Report, and Labels.

Name your section header.

Use the Narrative to make special notes.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.1.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goatopia

Section # 1 Rev. A Section Header At Ampa we name the section headers.

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY

Item Filter Find

Item	Description Display	Flag? Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge	Revenue Type	Sort
------	---------------------	--------------	------	-------	------	------	-----------	----------	---------	--------	--------------	------

Notes

Created by: Elizabeth Fleming
12/21/19
Modified by: Elizabeth Fleming
12/21/19

Discount %

Discount

Grand Total

Total

Tax

Photo Proposal Test

Photo Proposal PDF

Sections for Job # 12741

#	Name	Total
1.A	At Ampa we name the	

Total

Definitive Revision for Section #1, At Ampa we name the section headers.

A

Section Sort Order for Job # 12741

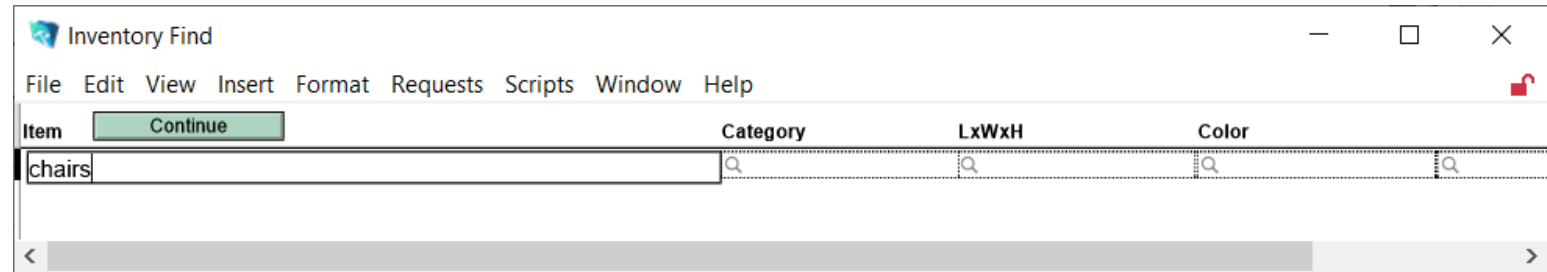
#	Name	Printout Sort Order
1.A	At Ampa we name the	

Click 'Find' to begin searching for inventory items.

The screenshot displays a software window titled "Section Detail" for job # 12741. The main window is titled "SECTION 12741.1.A - CURRENT DEFINITIVE VERSION". It contains a menu bar (File, Edit, View, Insert, Format, Records, Scripts, Window, Help) and a header section with fields for Job # (12741), Job Name (New Event), and Client Name (Goatopia). Below this is a table with columns for Section #, Rev., and Section Header. The first row shows Section # 1, Rev. A, and Section Header "At Ampa we name the section headers." A "Narrative Description" field contains the text "CHOOSE NAMES THAT MAKE SENSE ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY". A "Find" button is visible above a table with columns: Item, Description, Display, Flag?, Photo?, Size, Color, Rate, Tax?, Rate Calc, Quantity, Revenue Type, and Sort. An "Inventory Find" dialog box is open over the table, with a "Continue" button and search fields for Item, Category, LxWxH, and Color. On the right side, there are two panels: "Sections for Job # 12741" and "Section Sort Order for Job # 12741", both showing a list with columns #, Name, and Total. The "Section Sort Order" panel also has a "Printout Sort Order" button. At the bottom, there is a "Notes" field, a "Created by" field (Elizabeth Fleming, 12/21/19), a "Modified by" field (Elizabeth Fleming, 12/21/19), and summary fields for Total, Discount %, Tax, Discount, and Grand Total. A "Done" button and two buttons labeled "Photo Proposal Test" and "Photo Proposal PDF" are at the bottom right.

Type in a descriptor –
or if you are choosing
from website the SKU
number.

Hit continue to bring
up a list.



Now you have a list of chairs to choose from.

NOTE* It would be wise to search the inventory prior to this point so that you have an idea of what items you want.

Item	Close	Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quantity
Adirondack Chairs Parts			Material			\$75.00	
Chairs: Teak			Furniture	27 x 20 x 34	Teak	\$75.00	4
Chairs: Wood Bistro (Wood Slat)			Furniture	27 x 35 x 26	wood/ mixed	\$25.00	24
Chairs: Adirondack			Furniture: Lounae	36 x 48 x 26	wood finish	\$75.00	14
Chairs: Loft Chair			Furniture: Lounae	36" x 36" x 33"	white	\$175.00	8
Chairs: Matrix Chair Black			Furniture: Lounae	45" x 36" x 30"	Black	\$150.00	2
Chairs: Novelle Club Chair			Furniture: Lounae	32 x 32 x 29	Brown	\$150.00	5
Chairs: Gold Throne with Red Velvet			Furniture	36" x 62" x 24"	red/ aold	\$475.00	1
Chairs: Black Leather Samsonite Recliner			Furniture: Lounae	35 x 39 x 24		\$175.00	3
Chairs: Chiavari Mahogany			Furniture	16 x 36 x 16		\$7.50	
Chairs: Ghost Chair Clear Polycarbonate			Furniture: Lounae	21 x 36 x 22	clear	\$22.50	64
Chairs: Damask			Furniture: Lounae	26.5 x 42 x 29	White/ Black	\$150.00	8
Chairs: Rattan Malibu			Furniture: Lounae	33.5 x 25 x 33.5	espresso/white	\$175.00	8
Chairs: Split Back White			Furniture: Lounae	35" x 35" x 30"	White/ Ivory	\$175.00	8
Furniture: Cube Sofa Group w/ Glow Bubble Chairs			PROPOSAL ITEM	Furniture: Cube Sofa		\$1600.00	
Chairs: Polka Dot High Back			Furniture: Lounae	25.5 x 38 x 27.5		\$175.00	4
Chairs: Praque			Furniture: Lounae	35 x 33 x 31	white	\$195.00	4
Chairs: King Throne Lion Detail			Furniture	38" x 75.5" x 30"	dark brown	\$475.00	1
Furniture: Cube Sofa Seating Group w/ Damask Chairs			PROPOSAL ITEM			\$1600.00	1
Chairs: Powers Taupe Chair QS			Furniture	28.5" x 38" x 26.5"		\$150.00	
Chairs: French Country Truffle QS			Furniture	31" x 41" x 26"		\$150.00	
Chairs: French Country Taupe			Furniture: Lounae	31 x 41 x 26	white/orav	\$150.00	4
Chairs: Aluminum Bistro QS			Furniture	24" x 28.5" x 21.75"	silver	\$35.00	
Lounge: Double Cube Seating Group G w/ Bubble Chairs			PROPOSAL ITEM		Various	\$1800.00	
Chairs: Metro Black Metal Arm Chair			Furniture: Lounae	27 x 35 x 26	black	\$25.00	32
Chairs: Gilded Red Right & Left Pair			Furniture	26 x 43.5 x 25		\$375.00	1
Chairs: Barcelona White w/ Polished Steel			Furniture	33 x 34 x 30	White/ Ivory	\$175.00	4
Chairs: Glow Bubble			Furniture: Lounae	36 x 30 x 36	white	\$150.00	12
Chairs: Black Link Powell			Furniture	26.5 x 39 x 24	black/ white	\$150.00	2
Chairs: Barcelona Wooden Slat			Furniture	26 x 31.5 x 28		\$150.00	19
Chairs: Barcelona Black w/ Polished Steel			Furniture	33 x 34 x 30	black	\$175.00	4
Chairs: Metro Metal Arm Chair, Gun Metal with Wood Seat			Furniture	20 x 31 x 22		\$27.50	28
Chairs: Java Aviator Chair (Bomber)			Furniture	33.5 x 27.50 x 38.5	BROWN	\$375.00	4
Chairs: Simon Club Chair			Furniture	28.25 x 33 x 25.5	BROWN	\$150.00	9
Furniture: Cube Sofa Group w/ Lit Bubble Chairs			PROPOSAL ITEM	x x		\$1600.00	1
Chairs: Metro Metal Arm Chair White			Furniture	27" x 35" x 26"	white	\$25.00	44
Furniture: Cube Sofa Group w/ Barcelona Chairs White			Furniture	x x	white	\$1600.00	
Chairs: Mahogany Saddle Seat Stool			Furniture	16.5 x 18 x 13		\$75.00	2
For Sale: Chairs: Barcelona Wooden Slat			Furniture	26 x 31.5 x 28		\$150.00	9
Chairs: Metro Metal Arm Chair - Red			Furniture	27 x 35 x 26		\$35.00	36
Chairs: Arm Chair, Turquoise/Silver			Furniture: Lounae	22 x 39 x 24	Turquoise/Silver	\$150.00	5
Chairs: Arm Chair, Orange/White			Furniture: Lounae	23 x 36 x 23	Orange/White	\$150.00	5
Chairs: Cane Arm Chair, Black Antique, White Cushion			Furniture	x x	black-brown	\$275.00	4
Lounge Seating Group: Split Back w/ Damask Chairs				x x		\$1500.00	
Chairs: Leather Sling Chair, Brown			Furniture: Lounae	29 x 33 x 29	BROWN	\$150.00	5
Click on Item to add to current Section.							

Items in **RED**

These may need:

- Repair
- Sub-Rental
- Builds
- Graphics

But I am choosing
Novelle Club Chair

Item	Close	Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quantity
Adirondack Chairs Parts			Material			\$75.00	
Chairs: Teak			Furniture	27 x 20 x 34	Teak	\$75.00	4
Chairs: Wood Bistro (Wood Slat)			Furniture	27 x 35 x 26	wood/ mixed	\$25.00	24
Chairs: Adirondack			Furniture: Lounae	36 x 48 x 26	wood finish	\$75.00	14
Chairs: Loft Chair			Furniture: Lounae	36" x 36" x 33"	white	\$175.00	8
Chairs: Matrix Chair Black			Furniture: Lounae	45" x 36" x 30"	Black	\$150.00	2
Chairs: Novelle Club Chair			Furniture: Lounae	32 x 32 x 29	Brown	\$150.00	5
Chairs: Gold Throne with Red Velvet			Furniture	36" x 62" x 24"	red/ aold	\$475.00	1
Chairs: Black Leather Samsonite Recliner			Furniture: Lounae	35 x 39 x 24		\$175.00	3
Chairs: Chiavari Mahogany			Furniture	16 x 36 x 16		\$7.50	
Chairs: Ghost Chair Clear Polycarbonate			Furniture: Lounae	21 x 36 x 22	clear	\$22.50	64
Chairs: Damask			Furniture: Lounae	26.5 x 42 x 29	White/ Black	\$150.00	8
Chairs: Rattan Malibu			Furniture: Lounae	33.5 x 25 x 33.5	espresso/white	\$175.00	8
Chairs: Split Back White			Furniture: Lounae	35" x 35" x 30"	White/ Ivory	\$175.00	8
Furniture: Cube Sofa Group w/ Glow Bubble Chairs			PROPOSAL ITEM	Furniture: Cube Sofa		\$1600.00	
Chairs: Polka Dot High Back			Furniture: Lounae	25.5 x 38 x 27.5		\$175.00	4
Chairs: Praque			Furniture: Lounae	35 x 33 x 31	white	\$195.00	4
Chairs: King Throne Lion Detail			Furniture	38" x 75.5" x 30"	dark brown	\$475.00	1
Furniture: Cube Sofa Seating Group w/ Damask Chairs			PROPOSAL ITEM			\$1600.00	1
Chairs: Powers Taupe Chair QS			Furniture	28.5" x 38" x 26.5"		\$150.00	
Chairs: French Country Truffle QS			Furniture	31" x 41" x 26"		\$150.00	
Chairs: French Country Taupe			Furniture: Lounae	31 x 41 x 26	white/arav	\$150.00	4
Chairs: Aluminum Bistro QS			Furniture	24" x 28.5" x 21.75"	silver	\$35.00	
Lounge: Double Cube Seating Group G w/ Bubble Chairs			PROPOSAL ITEM		Various	\$1800.00	
Chairs: Metro Black Metal Arm Chair			Furniture: Lounae	27 x 35 x 26	black	\$25.00	32
Chairs: Gilded Red Right & Left Pair			Furniture	26 x 43.5 x 25		\$375.00	1
Chairs: Barcelona White w/ Polished Steel			Furniture	33 x 34 x 30	White/ Ivory	\$175.00	4
Chairs: Glow Bubble			Furniture: Lounae	36 x 30 x 36	white	\$150.00	12
Chairs: Black Link Powell			Furniture	26.5 x 39 x 24	black/ white	\$150.00	2
Chairs: Barcelona Wooden Slat			Furniture	26 x 31.5 x 28		\$150.00	19
Chairs: Barcelona Black w/ Polished Steel			Furniture	33 x 34 x 30	black	\$175.00	4
Chairs: Metro Metal Arm Chair, Gun Metal with Wood Seat			Furniture	20 x 31 x 22		\$27.50	28
Chairs: Java Aviator Chair (Bomber)			Furniture	33.5 x 27.50 x 38.5	BROWN	\$375.00	4
Chairs: Simon Club Chair			Furniture	28.25 x 33 x 25.5	BROWN	\$150.00	9
Furniture: Cube Sofa Group w/ Lit Bubble Chairs			PROPOSAL ITEM	x x		\$1600.00	1
Chairs: Metro Metal Arm Chair White			Furniture	27" x 35" x 26"	white	\$25.00	44
Furniture: Cube Sofa Group w/ Barcelona Chairs White			Furniture	x x	white	\$1600.00	
Chairs: Mahogany Saddle Seat Stool			Furniture	16.5 x 18 x 13		\$75.00	2
For Sale: Chairs: Barcelona Wooden Slat			Furniture	26 x 31.5 x 28		\$150.00	9
Chairs: Metro Metal Arm Chair - Red			Furniture	27 x 35 x 26		\$35.00	36
Chairs: Arm Chair, Turquoise/Silver			Furniture: Lounae	22 x 39 x 24	Turquoise/Silver	\$150.00	5
Chairs: Arm Chair, Orange/White			Furniture: Lounae	23 x 36 x 23	Orange/White	\$150.00	5
Chairs: Cane Arm Chair, Black Antique, White Cushion			Furniture	x x	black-brown	\$275.00	4
Lounge Seating Group: Split Back w/ Damask Chairs				x x		\$1500.00	
Chairs: Leather Sling Chair, Brown			Furniture: Lounae	29 x 33 x 29	BROWN	\$150.00	5
Click on Item to add to current Section.							

You can see that this is added to your proposal.

Adjust Quantities if applicable.

CHECK NOW to see why it is in red.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.1.A - CURRENT DEFINITIVE VERSION

Job #	Job Name	Client Name
12741	New Event	Goatopia

Section #	Rev.	Section Header
1	A	At Ampa we name the section headers.

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY

Item Filter

Item	Description Display	Flag? Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Chairs: Novelle Club Chair	Short Long	<input checked="" type="checkbox"/> <input type="checkbox"/>	32 x 32 x 29	Brown	150.00	<input checked="" type="checkbox"/>	150.00	1		\$150.00

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total	\$150.00
Tax	\$7.95
Discount	
Grand Total	\$157.95

Sections for Job # 12741

#	Name	Total
1.A	At Ampa we name the	\$157.95

Total \$157.95

Definitive Revision for Section #1, At Ampa we name the section headers.
 A

Section Sort Order for Job # 12741

Printout Sort Order

#	Name
1.A	At Ampa we name the

Done Photo Proposal Test Photo Proposal PDF

Reading the inventory page it appears that we are supposed to have 6 but only 5 are accounted for in the Warehouse.

As our proposal only needs 1 we are good to go!

Inventory Item

File Edit View Insert Format Records Scripts Window Help

New Dupe Form List Reports

Inventory Item In Stock Order Build Repair Rental

Created by: Christopher Gangloff
Modified by: Christopher Gangloff
07/17/19

01896 Chairs: **Novelle Club Chair**

Item Type: [] Rental Price: 150.00
WH Location: Janway 1 ("None" if 0) Qty: 5
Type/Category: Furniture: Lounge Weight: 18.7 lbs
Shelf #: D.4.1, D.4.2, WxHxD: 32 x 32 x 29
Lock? Taxable? Color: Brown
Repair Description: [] Revenue Type: Rental

Proposal Description (Short) [] Proposal Description (long) []

Technical Requirements
Should have 6

Manufacturer Serial # [] Cost [] KIT? Parts: [] Instructions Text: [] Instructions File: []
Item # N0102C
-Dani

Vendor: Primo International Purchased: []

Notes: [] Modification History: [] Kit Notes: []

ChrisG 7/17/2019 - Confirmed Web Info cq of good

Chairs: Novelle Club Chair

TrippM 8/10/17- website confirmed

TrippM 7/28/17- 1 is broken

Created on 07/15/10 Data Entry Complete? Active? Kit Only?

Enter data for Website

WEB Name: Novelle Club Chair Inventory Edit Code: []
CAT/NAV Name: Chairs|Speakeasy / Gangster|British|Ski
Separate Multiple with verticle line (!): Lodge|Farm-To-Table|Prehistoric|Safari & Lost City|Secret Agent / Spy|Western Tex-Mex
Install Time: []
Weighting: 650

Confirmed DATE: 06/27/2014 Dim. Type: []
Web Edit Code: 17IZC Width: 32
Small Image: Chairs novelle-club-chair Small.jpg Height: 32
Large Image: Chairs novelle-club-chair Large.jpg Depth: 29
Web Note: []
Description: []

Production Services

Label Date [] Home

Client Name: Goatopia

to?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
	32 x 32 x 29	Brown	150.00	<input checked="" type="checkbox"/>	150.00	1		\$150.00
							Rental	Sort

Total \$150.00

Definitive Revision for Section #1, At Ampa we name the section headers.
 A

Section Sort Order for Job # 12741

#	Name	Total
1.A	At Ampa we name the	\$157.95

Total \$157.95

Printout Sort Order

#	Name	Total
1.A	At Ampa we name the	\$157.95

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total \$150.00
Tax \$7.95
Discount % []
Discount []
Grand Total \$157.95

Photo Proposal Test Photo Proposal PDF


Note the WH Location at the top left of the page. Should you wish to view the item in person this is where it will be located.

Close this record by scrolling to the bottom of the page and clicking Done.

Inventory Item

File Edit View Insert Format Records Scripts Window Help

WH Location ("None" if 0) Qty
Type/Category Weight
Shelf # WxHxD
Lock? Taxable? Color
Revenue Type
Repair Description



Theme Find Themes

Proposal Description (Short) Proposal Description (long)

Technical Requirements
Should have 6

Manufacturer Serial # Cost Kit? Parts: Instructions Text Instructions File
Item # N0102C
-Dani

Vendor Purchased

Notes Modification History Kit Notes

ChrisG 7/17/2019 - Confirmed Web Info.cq of good

Chairs: Novelle Club Chair

TrippM 8/10/17- website confirmed

TrippM 7/28/17- 1 is broken

Created on 07/15/10 Data Entry Complete? Active? Kit Only?

Enter data for Website

WEB Name	Novelle Club Chair	Inventory Edit Code	ca
CAT/NAV Name	Chairs Speakeasy / Gangster British Ski	Install Time	<input type="text"/>
Separate Multiple with verticle line ().	Lodge Farm-To-Table Prehistoric Safari & Lost City Secret Agent / Spy Western Tex-Mex	Weighting	<input type="text" value="650"/>
Confirmed DATE	<input type="text" value="06/27/2014"/>	Dim. Type	<input type="text"/>
Web Edit Code	<input type="text" value="17IZC"/>	Width	<input type="text" value="32"/>
Small Image	Chairs novelle-club-chair Small.ipa	Height	<input type="text" value="32"/>
Large Image	Chairs novelle-club-chair Large.ipa	Depth	<input type="text" value="29"/>
Web Note	<input type="text"/>		
Description	<input type="text"/>		

rev 11/17/2015 2:45:58 PM

1 of 1 found
8,652 Total

History Labels Done

Next we are adding a second section and searching for Sets.

I want a Santa's Workshop Set.

The screenshot displays a software interface with two main windows. The 'Section Detail' window shows information for 'SECTION 12741.2.A - CURRENT DEFINITIVE VERSION' for Job # 12741, Job Name 'New Event', and Client Name 'Goatopia'. It lists Section # 2, Rev. A, and Section Header 'Stage Set'. The 'Inventory Find' window is a table with columns for Item, Close, Category, LxWxH, Color, Rental Price, and Quantity. It lists various items including 'Prop: Santa's Sleigh, Burgundy', 'Sign: Santa's Work Shop', 'Santa Photo Reception Area - Deluxe Kit', and 'Set: Santa's Workshop'. A yellow highlight is under the 'Close' column header. On the right side, there are two smaller panels: 'Sections for Job # 12741' showing a list of sections with a total of \$816.08, and 'Printout Sort Order for Job # 12741' showing a list of sections with a total of \$974.03. A 'Proposal PDF' button is visible at the bottom right.

Item	Close	Category	LxWxH	Color	Rental Price	Quantity
Prop: Santa's Sleigh, Burgundy		Christmas	48 x 48 x 96	Burgundy	\$750.00	1
Sign: Santa's Work Shop		Sign			\$25.00	1
Santa Photo Reception Area - Deluxe Kit		Christmas	120 x 96 x 48		\$1975.00	1
Set: Santa's Workshop		Stage set	96 x 132 x 12		\$775.00	1
Santa Photo Reception Area - Standard Kit		Christmas	120 x 96 x 48		\$1800.00	1
Sign: Street Sign: Santa Monica Blvd. (L.A.), (Metal)		Sign	24 x 6 x .25	Green/ White	\$10.00	1
Sign: Street Sign: Santa Claus Ln. (Christmas), (Coroplast)		Sign	24 x 6 x .25	red/white	\$10.00	1
Set Part: Front Flats, Santa's Workshop		StageSet Part	x x			2
Set Part: Back Flats, Santa's Workshop		StageSet Part	x x			2
Set Part: Return Panels, Santa's Workshop		StageSet Part	x x			2
Set Part: Triangle Roof Flats, Santa's Workshop		StageSet Part	x x			2
Set Part: Door, Santa's Workshop		StageSet Part	x x			1
Set Part: Roof Panels, Santa's Workshop		StageSet Part	x x			2
Set Part: Front Roof Edges, Santa's Workshop		StageSet Part	x x			2
Set Part: Back Roof Edges, Santa's Workshop		StageSet Part	x x			2
Set Part: Side Roof Edges, Santa's Workshop		StageSet Part	x x			2
Set Part: Chimney, Santa's Workshop		StageSet Part	x x			1
Prop: Santa's Sleigh, White		Christmas	48 x 48 x 96		\$750.00	1

When I added this to the proposal it shows up **BLUE**.

This alerts you that there is a potential conflict.

Hover over the item to see the conflict.

SECTION 12741.2.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goatopia

Section # 2 Rev. A Section Header Stage Set

Narrative Description

Item Filter Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Set: Santa's Workshop	Short Long			96 x 132 x		775.00	<input checked="" type="checkbox"/>	775.00	1		\$775.00

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$775.00**
Tax **\$41.08**
Discount %
Discount
Grand Total **\$816.08**

Sections for Job # 12741

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$816.08

Total \$974.03

Definitive Revision for Section #2, Stage Set
 A

Section Sort Order for Job # 12741

#	Name	Printout Sort Order
1.A	At Ampa we name the	
2.A	Stage Set	

Done Photo Proposal Test Photo Proposal PDF

You can see the conflicts with another job.

Go to that job to determine if you can still use this item.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.2.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goatopia

Section # 2 Rev. A Section Header Stage Set

Narrative Description

Item Filter Find

Item	Description	Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge	Revenue Type	Sort
Set: Santa's Workshop		Short	<input type="checkbox"/>	<input type="checkbox"/>	96 x 132 x		775.00	<input checked="" type="checkbox"/>	775.00	1		\$775.00	Rental	Sort

Blue text indicates potential scheduling conflict with these jobs:

- 12703
- 12703
- 12703
- 12703

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$775.00**
Tax **\$41.08**
Discount %
Discount
Grand Total **\$816.08**

Sections for Job # 12741

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$816.08

Total **\$974.03**

Definitive Revision for Section #2, Stage Set

A

Section Sort Order for Job # 12741

Printout Sort Order

1.A	At Ampa we name the
2.A	Stage Set

Done

Photo Proposal Test

Photo Proposal PDF

Go back to your Job Window.

Click on the Window Tab for a drop down menu.

Choose New Window to open up a new window to search for the job # containing the conflict.

The screenshot shows the JobCharge (FM17s-Mac-mini.local) application window. The 'Window' menu is open, displaying options: New Window, Show Window, Hide Window, Minimize Window, Tile Horizontally (Shift+F4), Tile Vertically, Cascade Windows (Shift+F5), Bring All to Front, and a list of open windows including '1 JobCharge (FM17s-Mac-mini.local)' and '2 Section Detail'. The background interface shows the 'New Event' form for job # 12741, with fields for Event Date (Saturday, 12/21/19), Location, and various other details. A 'No Payment' status is visible in red. The bottom navigation bar includes tabs for Notes, Event Information, Schedule, Proposal, Event Activities, Accounting, and Map. The Proposal section is active, showing a table of current versions:

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$816.08

At the bottom right of the Proposal section, the following values are displayed: Total: \$974.03, Deposit Required: [empty], Balance: \$974.03. On the right side of the application, there is a vertical sidebar with buttons for Home, Calendar, New, Find, Billing, Inventory, List, Dupe, Contract, Pick List, Delivery Report, Flag Report, and Labels.

A new and duplicate window for your job will open on top of the existing job.

Use your search function in this window.

The screenshot displays the JobCharge software interface. The main window is titled "JobCharge - 2 (FM17s-Mac-mini.local)" and shows a job entry for "Goatopia". The job details include the client name "Goatopia", contact "Beth Venable", and event name "New Event". The event date is "Saturday, 12/21/19". The interface features a navigation menu on the right with buttons for Home, Calendar, New, Find, Billing, Inventory, List, Dupe, Contract, Pick List, Delivery Report, and Flag Report. A "Labels" button is also visible at the bottom right. The main content area shows a "Notes" section with the text "We use this section for any special notes IN HOUSE ONLY." and "Notes to team members - Notes from preproduction -". The interface also includes a "Contract History" table and a "Status" section with radio buttons for Proposal, Event, and Expired.

Contract #	Date
12477	02/14/20
12693	11/29/19
12606	11/09/19
12588	10/31/19
12470	08/30/19

Job #	Event Name
12741	New Event

Event Date	Start Time	End Time	Service Type
Saturday, 12/21/19			

It helps if you wrote down the job number in conflict ;)

The screenshot displays the JobCharge software interface, which is a web-based application for managing event services. The main window is titled "JobCharge - 2 (FM17s-Mac-mini.local)" and features a menu bar with options: File, Edit, View, Insert, Format, Requests, Scripts, Window, and Help. The header area includes the company logo, the name "Design & Production Services", the phone number "800.358.5451", and the website "ampaevents.com".

The interface is divided into several sections:

- Left Sidebar:** Contains a "Find" button, a "Client" dropdown menu (currently showing "Goatop"), and a "Contact" dropdown menu (currently showing "Beth Ver"). Below these are input fields for "Email", "Address 1", "Address 2", "City", "Phone/Fax", and "URL". At the bottom of the sidebar, there are fields for "Job #", "Event Name", and "Event Date".
- Main Content Area:** Features a "Find" button at the top left. Below it are two "Contact" sections, each with fields for "Contact", "Title", "Phone/Fax", "Email", "Address 1", "Address 2", "City", "Phone/Fax", and "URL". To the right of these sections is a "Contract History" table with columns for "Contract" and "Record Date". Below the contract history is a "Status" section with radio buttons for "Proposal", "Event", and "Expired".
- Event Information Section:** Includes fields for "Job #", "Event Name", "Event Date", "Start Time", "End Time", "Service Type", "Location", "Preferred Contact Method", "How did Client find Ampa?", "Agent Activity Level", and "Marketing Cue".
- Bottom Navigation Bar:** Contains tabs for "Notes", "Event Information", "Schedule", "Proposal", "Event Activities", "Accounting", and "Map".
- Right Sidebar:** A vertical column of buttons for navigation: Home, Calendar, New, Find, Billing, Inventory, List, Dupe, Contract, Pick List, Delivery Report, and Flag Report. At the bottom of this sidebar is a "Labels" button.

The main content area shows a job entry form for job number 12703. The "Event Name" field is currently empty, and the "Event Date" field is set to "12703". The "Notes" tab is selected, and the "Notes" field is empty.

As you can see the events are occurring on the same day.

If both are in the proposal stage – now is the time to discuss with the other agent how likely either job is to book.

If the other is in Event status you will need to choose another Inventory piece.

JobCharge (FM17s-Mac-mini.local) JobCharge - 2 (FM17s-Mac-mini.local)

File Edit View Insert Format Reco File Edit View Insert Format Records Scripts Window Help

Design & Production Services Label Date

800.358.5451 ampaevents.com

Agent Leslie Amason Agent 2

Find Client **Goatopia** Contact Beth Venable Email Address 1 Address 2 City Phone/Fax URL

Find Client **Strauss Marketing PR** Contact Joy Edaria 12/13/19 Email joyedaria@gmail.com Address 1 5757 W lovers Ln #215 Address 2 City Dallas TX 75209 USA Phone/Fax 214-352-6700 URL

Contact 1 Joy Edaria Title PR Agent for Client Phone/Fax Email joyedaria@gmail.com

Contact 2 Title Phone/Fax Email

Contract History 12730 12/21/19 12703 12/21/19

Record Date 12/02/19 Active?

Status Proposal Event Expired

Contract 12/10/19 Out In In with Deposit

Preferred Contact Method How did Client find Ampa? Agent Activity Level Marketing Cue

Job # Event Name 12741 New Event 12703 Santa Photo Op

Event Date Saturday, 12/21/19 Saturday, 12/21/19 Start Time 3:00 PM End Time 6:00 PM Service Type Rental w/ Install & Take Down Location N. Bethesda Market Plaza, Bethesda, MD

Notes Event Information Schedule Proposal Event Activities Accounting Map

Event Date Saturday, 12/21/19 Event Location Same as Client Location Address 1 Address 2 City Phone Room Name Service Type # Attendees Tax Rate 5.30% Manual Disc. Additional Notes to be printed at end of Proposal

Sleigh must be sturdy enough and reinforced enough to have children sit with Santa in the sleigh for photos

Tent with green carpet, sides, lights, and heater being installed on the 20th by Brooks Rental (Jim Brooks)

(1) Hunter Green Spandex for 6ft rectangle & (1) Hunter Green poly linen for 4ft rectangle (will need to be tucked under since the only size for a 4ft table is for a 6ft rectangle) coming from Choice Linens.

Please take snow batting for trees and Santa's workshop. Ted wants all old batting plus some new to be taken.

Proposal 1st pass 12.13.19 all items a go

Home Calendar New Find Billing Inventory List Dupe Contract Pick List Delivery Report Flag Report Labels

Close down extra window (X is fine) and continue adding inventory items.

No conflict items will show up in **BLACK**

The screenshot shows a software window titled "Section Detail" for "SECTION 12741.2.A - CURRENT DEFINITIVE VERSION". The main area contains a table of items with columns for Item, Description, Display, Flag, Photo, Size, Color, Rate, Tax, Rate Calc, Quantity, Disc. %, and Charge. Two items are listed: "Set: Santa's Workshop" and "Lighting: Gobo, Standard Steel Retail".

Item	Description	Display	Flag	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Set: Santa's Workshop		Short	Long	<input type="checkbox"/>	96 x 132 x		775.00	<input checked="" type="checkbox"/>	775.00	1		\$775.00
Lighting: Gobo, Standard Steel Retail		Short	Long	<input type="checkbox"/>			12.50	<input checked="" type="checkbox"/>	12.50	1		\$12.50

Summary information at the bottom right of the main window:

Total	\$787.50
Tax	\$41.74
Discount	
Grand Total	\$829.24

On the right side, there is a "Sections for Job # 12741" panel with a table:

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$829.24

At the bottom of the window, there are buttons for "Done", "Photo Proposal Test", and "Photo Proposal PDF". A taskbar at the very bottom shows various application icons and the system clock.

To Remove an item from a proposal use Shift+Click

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.2.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goatopia

Section # 2 Rev. A Section Header Stage Set

Narrative Description

Item Filter Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Revenue Type	Charge
Lighting: Gobo, Standard Steel Retail	Short Long					12.50	X	12.50	1	Rental	\$12.50
Set: Santa's Workshop	Short Long			96 x 132 x		775.00	X	775.00	1	Rental	\$775.00

Click to duplicate item.
Shift-click to delete item.

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$787.50**
Tax **\$41.74**
Discount
Grand Total **\$829.24**

Sections for Job # 12741

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$829.24

Total **\$987.19**

Definitive Revision for Section #2, Stage Set
A

Section Sort Order for Job # 12741

Printout Sort Order	
1.A	At Ampa we name the
2.A	Stage Set

Done Photo Proposal Test Photo Proposal PDF

And 'OK' to permanently delete.

This is the **ONLY** time that we delete this way from a proposal section.

For record keeping when make changes to a section after a proposal has been fully created — we update the section.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.2.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goalopia

Section # 2 Rev. A Section Header Stage Set

Narrative Description

Item Filter Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Lighting: Gobo, Standard Steel Retail	Short Long	<input type="checkbox"/>	<input type="checkbox"/>			12.50	<input checked="" type="checkbox"/>	12.50	1		\$12.50
Set: Santa's Workshop	Short Long	<input type="checkbox"/>	<input type="checkbox"/>	96 x 132 x		775.00	<input checked="" type="checkbox"/>	775.00	1		\$775.00

Warning

Permanently delete this line item?

Cancel OK

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$787.50**
Tax **\$41.74**
Discount
Grand Total **\$829.24**

Sections for Job # 12741

#	Name	Total
1 A	At Ampa we name the	\$157.95
2 A	Stage Set	\$829.24

Total **\$987.19**

Definitive Revision for Section #2, Stage Set

A

Section Sort Order for Job # 12741

Printout Sort Order

1 A	At Ampa we name the
2 A	Stage Set

Printout Sort Order

Photo Proposal Test Photo Proposal PDF

And 'OK' to permanently delete.

This is the **ONLY** time that we delete this way from a proposal section.

For record keeping when make changes to a section after a proposal has been fully created — we Revise the section.

The screenshot shows a software window titled "Section Detail" for job # 12741. The main window displays details for "SECTION 12741.2.A - CURRENT DEFINITIVE VERSION". It includes fields for Job # (12741), Job Name (New Event), Client Name (Goatopia), Section # (2), Rev. (A), and Section Header (Stage Set). A table lists items with columns for Item, Description Display, Flag? Photo?, Size, Color, Rate, Tax?, Rate Calc, Quantity, Disc. %, and Charge. Two items are listed: "Lighting: Gobo, Standard Steel Retail" and "Set: Santa's Workshop". A "Warning" dialog box is open in the center, asking "Permanently delete this line item?" with "Cancel" and "OK" buttons. On the right, a "Sections for Job # 12741" table shows a summary of sections 1.A and 2.A. At the bottom right, a summary box shows "Total \$787.50", "Tax \$41.74", and "Grand Total \$829.24".

Item	Description Display	Flag? Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Lighting: Gobo, Standard Steel Retail		Short Long			12.50		12.50	1		\$12.50
Set: Santa's Workshop		Short Long	96 x 132 x		775.00		775.00	1		\$775.00

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$829.24

Total: \$987.19

Definitive Revision for Section #2, Stage Set: A

Section Sort Order for Job # 12741

#	Name	Printout Sort Order
1.A	At Ampa we name the	
2.A	Stage Set	

Total: \$987.19

Printout Sort Order

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total: \$787.50
Tax: \$41.74
Discount %:
Discount:
Grand Total: \$829.24

Buttons: Done, Photo Proposal Test, Photo Proposal PDF

Section Revisions

We no longer want the Club Chairs initially chosen.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.1.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goatopia

Section # 1 Rev. A Section Header At Ampa we name the section headers.

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY

Item Filler Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Chairs: Novelle Club Chair	<input checked="" type="radio"/> Short <input type="radio"/> Long	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32 x 32 x 29	Brown	150.00	<input checked="" type="checkbox"/>	150.00	1		\$150.00

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$150.00**
Tax **\$7.95**
Discount
Grand Total **\$157.95**

Sections for Job # 12741

#	Name	Total
1.A	At Ampa we name the	\$157.95
2.A	Stage Set	\$13.16

Total \$171.11

Definitive Revision for Section #1, At Ampa we name the section headers.
 A

Section Sort Order for Job # 12741

Printout Sort Order	
1.A	At Ampa we name the
2.A	Stage Set

Done Photo Proposal Test Photo Proposal PDF

Hover over
the + sign

Click to create a revision

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.1.A - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name **Goatopia**

Section # 1 Rev. Section Header **A Click to create Revision 1.B for Job # 12741 aders.**

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY

Item Filter Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Revenue Type	Sort	Disc. %	Charge
Chairs: Novelle Club Chair	Short	<input checked="" type="radio"/>	<input type="checkbox"/>	32 x 32 x 29	Brown	150.00	<input checked="" type="checkbox"/>	150.00	1	Rental	Sort		\$150.00

Note

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$150.00**
Tax **\$7.95**
Discount
Grand Total **\$157.95**

Sections for Job # 12741

#	Name	Total
1 A	At Ampa we name the	\$157.95
2 A	Stage Set	\$13.16

Total \$171.11
Definitive Revision for Section #1, At Ampa we name the section headers.
 A

Section Sort Order for Job # 12741

Printout Sort Order

1 A	At Ampa we name the
2 A	Stage Set

Done Photo Proposal Test Photo Proposal PDF

Notes Comments

Now the
Section is 1.B
instead of 1.A

Time to search for
new chairs

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.1.B - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goalopia

Section # 1 Rev. B Section Header At Ampa we name the section headers.

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY

Item Filter Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Chairs: Novelle Club Chair	Short	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32 x 32 x 29	Brown	150.00	<input checked="" type="checkbox"/>	150.00	1		\$150.00

Notes

Created by: Elizabeth Fleming
12/21/19
Modified by: Elizabeth Fleming
12/21/19

Total \$300.00
Tax \$15.90
Discount
Grand Total \$315.90

Sections for Job # 12741

#	Name	Total
1.B	At Ampa we name the	\$157.95
2.A	Stage Set	\$13.16

Total \$329.06

Definitive Revision for Section #1, At Ampa we name the section headers.
 A B

Section Sort Order for Job # 12741

Printout Sort Order	
1.B	At Ampa we name the
2.A	Stage Set

Done Photo Proposal Test Photo Proposal PDF

There is a similar listing.

Simon Club Chair

Section Detail

File Edit View Insert Format Records

SECTION 12741.1.B - CURRENT

Job # 12741 Job Name **New Event**

Section # 1 Rev. B Section Header At Ampa we name

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING -

Item Filter Find

Item
Chairs: **Novelle Club Chair**

Notes

Inventory Find

File Edit View Insert Format Records Scripts Window Help

Item	Close	Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quantity
Adirondack Chairs Parts			Material			\$75.00	
Chairs: Teak			Furniture	27 x 20 x 34	Teak	\$75.00	4
Chairs: Wood Bistro (Wood Slat)			Furniture	27 x 35 x 26	wood/ mixed	\$25.00	24
Chairs: Adirondack			Furniture: Lounce	36 x 48 x 26	wood finish	\$75.00	14
Chairs: Loft Chair			Furniture: Lounce	36" x 36" x 33"	white	\$175.00	8
Chairs: Matrix Chair Black			Furniture: Lounce	45" x 36" x 30"	Black	\$150.00	2
Chairs: Novelle Club Chair			Furniture: Lounce	32 x 32 x 29	Brown	\$150.00	5
Chairs: Gold Throne with Red Velvet			Furniture	36" x 62" x 24"	red/ gold	\$475.00	1
Chairs: Black Leather Samsonite Recliner			Furniture: Lounce	35 x 39 x 24		\$175.00	3
Chairs: Chiavari Mahogany			Furniture	16 x 36 x 16		\$7.50	
Chairs: Ghost Chair Clear Polycarbonate			Furniture: Lounce	21 x 36 x 22	clear	\$22.50	64
Chairs: Damask			Furniture: Lounce	26.5 x 42 x 29	White/ Black	\$150.00	8
Chairs: Rattan Malibu			Furniture: Lounce	33.5 x 25 x 33.5	espresso/white	\$175.00	8
Chairs: Split Back White			Furniture: Lounce	35" x 35" x 30"	White/ Ivory	\$175.00	8
Furniture: Cube Sofa Group w/ Glow Bubble Chairs			PROPOSAL ITEM	Furniture: Cube Sofa		\$1600.00	
Chairs: Polka Dot High Back			Furniture: Lounce	25.5 x 38 x 27.5		\$175.00	4
Chairs: Praque			Furniture: Lounce	35 x 33 x 31	white	\$195.00	4
Chairs: King Throne Lion Detail			Furniture	38" x 75.5" x 30"	dark brown	\$475.00	1
Furniture: Cube Sofa Seating Group w/ Damask Chairs			PROPOSAL ITEM			\$1600.00	1
Chairs: Powers Taupe Chair QS			Furniture	28.5" x 38" x 26.5"		\$150.00	
Chairs: French Country Truffle QS			Furniture	31" x 41" x 26"		\$150.00	
Chairs: French Country Taupe			Furniture: Lounce	31 x 41 x 26	white/orav	\$150.00	4
Chairs: Aluminum Bistro QS			Furniture	24" x 28.5" x 21.75"	silver	\$35.00	
Lounge: Double Cube Seating Group G w/ Bubble Chairs			PROPOSAL ITEM		Various	\$1800.00	
Chairs: Metro Black Metal Arm Chair			Furniture: Lounce	27 x 35 x 26	black	\$25.00	32
Chairs: Gilded Red Right & Left Pair			Furniture	26 x 43.5 x 25		\$375.00	1
Chairs: Barcelona White w/ Polished Steel			Furniture	33 x 34 x 30	White/ Ivory	\$175.00	4
Chairs: Glow Bubble			Furniture: Lounce	36 x 30 x 36	white	\$150.00	12
Chairs: Black Link Powell			Furniture	26.5 x 39 x 24	black/ white	\$150.00	2
Chairs: Barcelona Wooden Slat			Furniture	26 x 31.5 x 28		\$150.00	19
Chairs: Barcelona Black w/ Polished Steel			Furniture	33 x 34 x 30	black	\$175.00	4
Chairs: Metro Metal Arm Chair. Gun Metal with Wood Seat			Furniture	20 x 31 x 22		\$27.50	28
Chairs: Java Aviator Chair (Bomber)			Furniture	33.5 x 27.50 x 38.5	BROWN	\$375.00	4
Chairs: Simon Club Chair			Furniture	28.25 x 33 x 25.5	BROWN	\$150.00	9
Furniture: Cube Sofa Group w/ Lit Bubble Chairs			PROPOSAL ITEM	x x		\$1600.00	1
Chairs: Metro Metal Arm Chair White			Furniture	27" x 35" x 26"	white	\$25.00	44
Furniture: Cube Sofa Group w/ Barcelona Chairs White			Furniture	x x	white	\$1600.00	
Chairs: Mahogany Saddle Seat Stool			Furniture	16.5 x 18 x 13		\$75.00	2
For Sale: Chairs: Barcelona Wooden Slat			Furniture	26 x 31.5 x 28		\$150.00	9
Chairs: Metro Metal Arm Chair - Red			Furniture	27 x 35 x 26		\$35.00	36
Chairs: Arm Chair. Turquoise/Silver			Furniture: Lounce	22 x 39 x 24	Turquoise/Silver	\$150.00	5
Chairs: Arm Chair. Orange/White			Furniture: Lounce	23 x 36 x 23	Orange/White	\$150.00	5
Chairs: Cane Arm Chair. Black Antique. White Cushion			Furniture	x x	black-brown	\$275.00	4
Lounge Seating Group: Split Back w/ Damask Chairs				x x		\$1500.00	
Chairs: Leather Sling Chair. Brown			Furniture: Lounce	29 x 33 x 29	BROWN	\$150.00	5

Click on Item to add to current Section.

Add that – now delete the previous chair.

Section Detail

File Edit View Insert Format Records Scripts Window Help

SECTION 12741.1.B - CURRENT DEFINITIVE VERSION

Job # 12741 Job Name **New Event** Client Name Goalopia

Section # 1 Rev. B Section Header At Ampa we name the section headers.

Narrative Description
CHOOSE NAMES THAT MAKE SENSE
ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY

Item Filter Find

Item	Description Display	Flag?	Photo?	Size	Color	Rate	Tax?	Rate Calc	Quantity	Disc. %	Charge
Chairs: Novelle Club Chair	Short Long	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32 x 32 x 29	Brown	150.00	<input checked="" type="checkbox"/>	150.00	1		\$150.00
Chairs: Simon Club Chair	Short Long	<input type="checkbox"/>	<input type="checkbox"/>	28.25 x 33 x	BROW	150.00	<input checked="" type="checkbox"/>	150.00	1		\$150.00

Notes

Created by: Elizabeth Fleming 12/21/19
Modified by: Elizabeth Fleming 12/21/19

Total **\$300.00**
Tax **\$15.90**
Discount %
Discount
Grand Total **\$315.90**

Sections for Job # 12741

#	Name	Total
1.B	At Ampa we name the	\$315.90
2.A	Stage Set	\$13.16

Total **\$329.06**

Definitive Revision for Section #1, At Ampa we name the section headers.
 A B

Section Sort Order for Job # 12741

Printout Sort Order
1.B At Ampa we name the
2.A Stage Set

Done

Photo Proposal Test

Photo Proposal PDF

Ampa Standards Labor/Delivery

Administrative Fee and Delivery can be used as negotiating tools – but must be approved.

*This does not apply to rental department

- Busy Season – April thru June & September thru December
- Labor: \$880.00 or 30% whichever is greater.
- Delivery: 24ft \$475.00, 16ft \$375.00
- Administrative Fee:\$250.00
- Equipment Minimums:
 - Delivery w/ Install: Off-2k, Busy-5k
 - Drop off only – Reviewed on a case by case basis
 - Pick ups: Off -250.00, Busy -500.00

Ampa Standards Labor/Delivery

- Rental Department will have different standards for L/D given that the ultimate goal is to have 1 truck with multiple local jobs dropping off and picking up only.

Ampa Standards Wholesale

- We often partner with clients and offer a Wholesale Discount.
 - This would require two 'jobs' one for the client to provide to the end user and one a billing job to send to the client.
 - We offer our wholesale clients 10% or 20% discounts.
 - 10% discount on equipment only with design services
 - 20% discount on equipment only no design
 - To qualify for a 20% wholesale discount the equipment order must be over 5k.

Day Two

Ask questions!

Find your Territory – using learned search methods

Prioritize Clients

Research and prepare for outreach activities

Territory Search

Choose field you wish to search by
– in this case Region NC

The screenshot shows the JobCharge application window titled "JobCharge (FM17s-Mac-mini.local)". The menu bar includes "File", "Edit", "View", "Insert", "Format", "Requests", "Scripts", "Window", and "Help". A navigation bar contains buttons for "Home", "Main", "Legacy", "Calendar", "Schedule", "Admin", "Inventory", "Clients" (highlighted in blue), and "Vendors".

The "Clients" section features a search interface with the following fields: "Client #", "Client Name", "Client Type", "Client List", "Region" (containing "NC"), "Category", "Phone", "Fax", "Contact", and "Conta". Each field has a search icon.

At the bottom of the interface, there is a control bar with the following elements from left to right: navigation arrows, a status indicator "1 of found Total", "Detail" button, zoom in (+) and zoom out (-) buttons, a "Sort" button, a search icon, a dropdown menu set to "Standard", a "Client List" button, an "Export Contacts" button, and a "Labels" button.

Sorting

Determine how you wish to sort your list.

By Agent will allow you to choose targets that have not been worked by your team first as a priority.

The screenshot shows the JobCharge (FM17s-Mac-mini.local) application interface. A 'Sort Records' dialog box is open, allowing the user to sort the client list. The dialog box has a 'Current Layout ("Clients_List User")' dropdown and a list of fields to sort by, including '@@', '#', 'Active?', 'Agent_1_#', 'Agent_1_Name', 'Agent_2_Name', 'Client_#', 'Client_Category', and 'Client_List'. The 'Sort Order' section is set to 'Ascending order'. The 'Keep records in sorted order' checkbox is checked. The background shows a table of client records with columns for Client Type, Client List, Region, Category, Phone, Fax, Contact, Contact Phone, Contact Cell Phone, Active?, Keep?, Agent, and Agent 2.

Client Type	Client List	Region	Category	Phone	Fax	Contact	Contact Phone	Contact Cell Phone	Active?	Keep?	Agent	Agent 2
Planner	NC	NC - Charlotte		704.334.6134		Jackie Corbill			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	Leslie Amason
Venue	Hotel	NC -	Venue: hotel	336-294-1800	336-856-9991	Sahid Canavazi			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	NC - Charlotte		704-377-1500		Sam Gatoo			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Venue	Hotel	NC		919-872-2323					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Talent Buyers	Internally	NC - Charlotte		704-339-0100					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Venue	Hotel	NC		910-458-2030					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	Internally	NC - Charlotte	704-333-9000					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	Internally	NC - Charlotte	704-527-9650					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	Internally	NC - Charlotte	704-364-8220					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	Internally	NC - Charlotte	704-501-2510					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	Internally	NC - Charlotte	Venue: hotel	704-357-1414				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Venue	Hotel	NC - Triangle		919-768-6000					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	NC -		336-379-8000					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	NC -		336-852-6450					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	NC - Triangle		919-833-1120					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	NC - Triangle		919-781-7000					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	
Venue	Hotel	NC -		336-725-3500					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Rubis	

You can see that there are 299 Client accounts that are available for contact.

Now research and prioritize.

JobCharge (FM17s-Mac-mini.local)

File Edit View Insert Format Records Scripts Window Help

Home Main Legacy Calendar Schedule Admin Inventory **Clients** Vendors

Show Active Only

Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact	Contact Phone	Contact Cell Phone	Active?	Keep?	Agent
← 283	23489	Comfort Inn on the Ocean	Venue: Hotel	Hotel	NC - East	Venue: hotel	252-441-6333	Lindsey			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
← 284	16167	Elon University	College/Univer	School	NC	School	336.278.2000	Carolyn Ent			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
← 285	26350	Oasis-Suites-Hotel	Venue: Hotel	OBX Wedding	NC - East	Venue: hotel	252 441-5211	252-441-5531			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cannan Keller
← 286	19314	Ashe Memorial Hospital, Inc.	Hospital	Hospitals	NC		336-846-7101	Patty Parson			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Emily Dearing
← 287	19340	CaroMont Health Foundation	Hospital	Hospitals	NC		(704) 834-4034				<input checked="" type="checkbox"/>	<input type="checkbox"/>	Emily Dearing
← 288	19344	Cherry Foundation	Hospital	Hospitals	NC		(919) 731-3417				<input checked="" type="checkbox"/>	<input type="checkbox"/>	Emily Dearing
← 289	19345	Columbus Regional Healthcare Foundation	Hospital	Hospitals	NC		706-660-6115				<input checked="" type="checkbox"/>	<input type="checkbox"/>	Emily Dearing
← 290	20806	DJ Ben Felton	DJ	Internally	NC - Triangle			Ben Felton			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Emily Dearing
← 291	24842	Northwest Guilford High School (duplicate)	School	School	NC - Triangle	HighSchool		Kim Dayton			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Goszinski
← 292	24543	Southwest Guilford High School	School	School	NC - Triangle	HighSchool	(336) 819-2970	Beth Burroughs			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Goszinski
← 293	24544	Ragsdale High School	School	School	NC - Triangle	HighSchool	(336) 819-2960	Jennifer Pfeiffer			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Goszinski
← 294	24545	J. F. Kennedy High School NC	School	School	NC - Triangle	HighSchool	(336) 703-4143	Mis Fendley			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Goszinski
← 295	24546	James B. Dudley High School	School	School	NC - Triangle	HighSchool	(336) 370-8130	Ashantae Brooks			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Goszinski
← 296	24847	Early College of Forsyth County	School	School	NC - Triangle	HighSchool	(336) 757-3290	LISA NAKAWATASE			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Goszinski
← 297	12034	Arendell Parrott Academy	High School -	School	NC - West	School	252-522-4222	Betsy Barrow	252-522-4222	x264	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Heather Ernst
← 298	12331	First Flight High School	High School -	School	NC - Triod	School	(252) 449-7000	Ms Meads			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Heather Ernst
← 299	12333	Currituck County High School	High School -	School	NC - East	School	252-453-0014	Jade Bennett		828-319-1115	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Heather Ernst

393 of 402 found
15,794 Total

Detail + - Sort Standard Client List Export Contacts Labels

Start with #1

Then scroll through using arrows at the bottom.

Look for previous events with Ampa, they would be likely to book again.

The screenshot shows the JobCharge (FM17s-Mac-mini.local) application window. The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Scripts, Window, Help) and a navigation bar with buttons for Home, Main, Legacy, Calendar, Schedule, Admin, Inventory, Clients (selected), and Vendors. The main content area is divided into several sections:

- CLIENTS** (Date: 08/04/2010):
 - Client # 09461, Client Name Hilton Charlotte Center City, General Phone 704-377-1500, Active?
 - Address: 222 E. 3rd St., City: Charlotte, State: NC, Zip: 28202, Country: USA
 - Client Type: Venue: Hotel, Client List: Hotel, Region: NC - Charlotte, Category:
 - Agent: , Agent 2:
 - Contacts** table:

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Sam	Gatoo				08/04/2010	Sam.gatoo-	<input checked="" type="checkbox"/>
Kayla	Gipner	Event Man. 2017	704-331-4382		03/07/2017	kayla.	<input type="checkbox"/>
Tracey	Suit	Dir of Sales 2017			06/03/2015	tracy.suit@hiltoncentercity.	<input type="checkbox"/>
- Correspondence/Activities** table:

Date	Activity	Employee
12/06/19	Phone Call	Holland, Darnell
03/07/17	Phone Call	
09/29/14	Phone Call	
- Client Jobs** (Tax Rate: 5%):
 - Job #, Date, Job Name columns are empty.
 - Notes: PSAV property

At the bottom, there is a status bar showing "1 of 402 found, 15,794 Total" and navigation buttons: List, +, -, Client List, and View Legacy Record.

54 contacts in we find our first proposal shown.

Prioritizing your territory lists can be done in many ways.

Find what works for you, success in sales is a numbers game and a balance of research with calling.

The screenshot shows the JobCharge software interface. The main window title is "JobCharge (FM17s-Mac-mini.local)". The menu bar includes "File", "Edit", "View", "Insert", "Format", "Records", "Scripts", "Window", and "Help". The navigation bar has buttons for "Home", "Main", "Legacy", "Calendar", "Schedule", "Admin", "Inventory", "Clients", and "Vendors". The "Clients" tab is active, showing details for client #12194, "The Proper Setting / obxBrides.com".

CLIENTS Date: 01/09/2012

Client #	Client Name	General Phone	General Fax	Active?
12194	The Proper Setting / obxBrides.com	252 441-8166		<input checked="" type="checkbox"/>

Address: PO Box 3007, Kill Devil Hills, NC 27948, USA. URL: www.thepropersetting.com. Region: NC - East.

Contacts

First Name	Last Name	Title	Phone_General	Cell Phone	Date	Email	Default?
Kerri	Catino-Nason	New Owner	252-441-8166		01/30/2018	info@thepropersetting.com	<input checked="" type="checkbox"/>
Eric	Kallestad				03/01/2011		<input type="checkbox"/>
Nannette	Kallestad		252 449-6664		03/01/2011	thepropersetting.com	<input type="checkbox"/>

Client Jobs Tax Rate: 5%

Job #	Date	Job Name	Notes
7603	03/24/12	OBX Brides Wedding Show	At the Sanderling.

Correspondence/Activities

Date	Activity	Employee
02/16/12	Phone Call	
12/29/11	Phone Call	
12/20/11	Phone Call	
03/02/11	Phone Call	
03/01/11	General Notes	

Bottom status bar: 54 of 402 found, 15,794 Total. Buttons: List, Client List, View Legacy Record.

Researching Clients

- The internet can be our friend when it comes to client research. Nearly everyone has a website or Facebook page, including all schools.
- This can be used to research what events an organization or school has done in the past, to suggest ideas for their future events.
- Have a plan in mind when first contacting clients. Talking points, ideas, link backs to our inventory on the web, etc.

Advance Planning

- Have you every tried to buy a bathing suit in July?
- Event Planning is similar to fashion –ALWAYS be thinking (at a minimum) a season ahead.
- The more complicated the event – the further out the planning begins.

DON'TS

- Do NOT send attachments in emails. Use links
- Do NOT say we don't have that item. We can always sub-rent.
- Do NOT be passive. Be proactive without being pushy.
 - “I understand you're busy, I will send you an email and follow up with you next week”
 - “Would love to set up a time to talk – I have MWF next week, which day works with your schedule”.

Proposal Approval

- Currently all proposals must be approved by management. We have a 72 hour turn around.
- Place your proposal in the Daily folder and it will be returned to you within 72 hours.

Performance Metrics

- Sales team has a Goal of 175 outreach activities per week
- Sales team is expected to bring in the income outlined in their offer letters. Remember though, the more you bring in the more you have the potential to make.
- Sales team is expected to go out on their high value jobs.
 - High value can be dollar amounts or client relations.

HAPPY CALLING!!!