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

IobCharge (FM17s-Mac-mini.local) Х _ File Edit View Insert Format Records Scripts Window Help Calendar Schedule Vendors Home Main Legacy Admin Inventory Clients MAIN MENU JobCharge Customized for: Œ AMPA EVENTS ampa events 6701 JANWAY RD EnglishComp HENRICO, VA 23228

12473 12187 12441 12471 12395 12275 12356	Esto Chandelier Frame Pick	Type Design & Design & Pick Up Rental w/	Client Albrecht Events Shankar Wedding Events By TRB Olivia Spear	Date 08/23/19 09/01/19 09/06/19 09/12/19	10:00 AM 5:00 PM	Location 10300 Mill Run Circle, Owing Mills Mellon Auditorium Washington, DC	Agent Ted Rubis Heather Ernst Heather Ernst
12187 12441 12471 12395 12275 12356	Wedding at the Mellon- Decor Library Event Esto Chandelier Frame Pick Carpet Installation	Design & Pick Up	Shankar Wedding Events By TRB Olivia Spear	09/01/19 09/06/19	5:00 PM	Mellon Auditorium Washington, DC	Heather Ernst
12441 12471 12395 12275 12356	Library Event Esto Chandelier Frame Pick Carpet Installation	Design & Pick Up	Events By TRB Olivia Spear	09/06/19		Washington, DC	
12471 12395 12275 12356	Esto Chandelier Frame Pick	Pick Up	Olivia Spear		0:00 AM		Heather Ernst
12395 12275 12356	Carpet Installation	· ·		09/12/19	0.00 0.04		
12275 12356		Rental w/	Openator		8.00 AW	Pick up	Heather Ernst
12356	Off-site Dinner - Vintage		Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst
		Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis
40055	Color Me DC		Capital City Events CCE	09/25/19	6:00 PM	Watergate	Ted Rubis
12355	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis
12186	Literary Awards	Rental w/	Library of Virginia	10/19/19	6:00 PM	Library of Virginia Foundation	Leslie Amason
12442	Planning Services -	Planning &	Hunton Andrews Kurth	10/22/19		Shed	Ted Rubis
12367	Halloween - Harry Potter	Design &	Army Navy Country Club	10/25/19			Ted Rubis
12365	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/08/19		Army Navy Country Club	Ted Rubis
12366	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis
12332	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Sandra Crowe

JobCharge Home Page

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.

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× 12473	Chair and Pillow Delivery		Albrecht Events	08/23/19		10300 Mill Run Circle, Owing Mills	-	
% 12187	Wedding at the Mellon- Decor	Design &	Shankar Wedding	09/01/19		Mellon Auditorium	Heather Ernst	
× 12441	Library Event	Design &	Events By TRB	09/06/19		Washington, DC	Heather Ernst	
* 12471	Esto Chandelier Frame Pick		Olivia Spear	09/12/19	8:00 AM	Pick up	Heather Ernst	
\$ 12395	Carpet Installation	Rental w/	Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst	
K 12275	Off-site Dinner - Vintage	Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis	
% 12356	Color Me DC		Capital City Events CCE	09/25/19	6:00 PM	Watergate	Ted Rubis	
\$ 12355	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis	
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% 12367	Halloween - Harry Potter	Design &	Army Navy Country Club	10/25/19			Ted Rubis	
\$ 12365	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/08/19		Army Navy Country Club	Ted Rubis	
* 12366		Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis	
* 12332	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Sandra Crowe	
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Basic Searches

*Events

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

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N 12441		Design &	Events By TRB	09/06/19		Washington, DC	Heather Ernst	
N 12471	Esto Chandelier Frame Pick	Pick Up	Olivia Spear	09/12/19	8:00 AM	Pick up	Heather Ernst	
12395		Rental w/	Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst	
12275	Off-site Dinner - Vintage	Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis	
12356	Color Me DC		Capital City Events CCE	09/25/19	6:00 PM	Watergate	Ted Rubis	
12355	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis	
% 12186	Literary Awards	Rental w/	Library of Virginia	10/19/19	6:00 PM	Library of Virginia Foundation	Leslie Amason	
% 12442	Planning Services -	Planning &	Hunton Andrews Kurth	10/22/19		Shed	Ted Rubis	
\$ 12367	Halloween - Harry Potter	Design &	Army Navy Country Club	10/25/19			Ted Rubis	
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% 12366	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis	
% 12332	Prom 2020 w/10% Equipment	Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Sandra Crowe	

Job - Event Page - To Search within FileMaker/ JobCharge use Crtl+F (PC) Command+F (Apple)

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

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

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6456	Hollywood Promo for Shula's		U.s. did	ed Contact Method			
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-As you can see there are 81 events with this as a theme

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+	1	6456	Hollywood Promo for Shula's	Tidewater Productions	10/17/10			Event		\$21
+	2	6511	Golden Age of Hollywood - Glamourous	The Ritz Cariton - Tyson's Corner	10/19/10	Ted Rubis		Event	Ritz Cariton Tyson's Corner	\$14,99
+	3	6729	Hollywood Awards Night	Pure Dymonds Events	06/10/11			Event	The Lesner Inn in VA Beach	\$1,29
+	4	6818	A Night In Hollywood - Drop Off	Tarboro High School	05/14/11			Event	Nash Community College	\$1,85
+	5	6865	Hollywood Dance	Tomahawk Creek Middle School	06/03/11			Expired	The School X	\$33
+	6	6866	Hollywood Red Carpet Prom	Severna Park High School	05/21/11	Ted Rubis		Event	BWI Marriott	\$3,88
+	7	7042	Hollywood Prom	Huguenot High School	05/13/11			Event	Science Museum of VA - rotunda	\$2,00
+	8	7060	Golden Age of Hollywood -	Capital City Events CCE	11/06/11	Ted Rubis		Proposal	Marriotte Wardman Park	\$39,93
+	9	7090	Hollywood Mitzvah for Hannah and	Inspired Events by Kelly	10/15/11			Expired	Hilton Virginia Beach Oceanfront	
← 1	10	7456	Hollywood Homecoming	Woodrow Wilson High School DC	10/22/11			Event		\$2,89
€ 1	1	7651	Hollywood Red Carpet Entrance Element	s Ridgewells Catering	01/20/12	Ted Rubis		Event	Meadowlark B-Gardens Atrium	\$2,362
← 1	12	7668	Hollywood Prom	Jamestown High School	04/21/12			Expired	Great Wolf Lodge X	
€ 1	13	7714	Hollywood Red Carpet Affair - Prom 2012	Northwestern High	05/24/12			Expired	Samuel Riggs Alumni Center on the 🛛 🗙	\$6,98
÷ 1	14	7722	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22			Proposal		\$1,17
÷ 1	15	7725	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22	Ted Rubis		Proposal		\$2,51
÷ 1	16	7740	Hollywood Prom 2012	Camden County High School	05/05/12			Event	Camden County High School	\$3,065
+ -	17	7743	Hollywood Theme Events	PreCon Events	03/14/12	Ted Rubis		Event	Bethesda North Marriott SALON *C"	\$2,86
(- 1	18	7755	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12			Expired	×	
÷ -	19	7756	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12			Expired	×	\$4,33
+ 2	20	7853	Hollywood Theme Events - Day 1	PreCon Events	03/13/12	Ted Rubis		Event	Bethesda North Marriott SALON *C*	\$3,60
+ 2	21	7855	Awards/Hollywood Theme Rentals	Woodrow Wilson High School DC	02/29/12			Event	Woodrow Wilson High School DC	\$1,34
	22	7933	Talent 'N' Training: Hollywood Nights Par	ty USA Discounters (USA Living)	06/11/12			Event	Hilton Oceanfront, Virginia Beach	\$4,66

💐 JobCharge (FM17s-Mac-mini.local)

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.

Home	Main Legacy	Calendar Schedule	Admin	Clients	Vendors				
Events/Pre	-								
Job #	Job Name Hollywood Mitzvah for Hannah and	Client Inspired Events by Kelly	Event Date 10/15/11	Agent	Agent 2	Status Expired	Location Hilton Virginia Beach Oceanfront	Active?	Ac
- 2 7668	Hollywood Prom	Jamestown High School	04/21/12			Expired	Great Wolf Lodge	X	
- 3 7755	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12			Expired		×	
- 4 7941	Hollywood Prom 2012		05/18/12			Expired		X	
- 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	X	
- 7 10905	PCMA - Old Hollywood	PCMA: Washington D.C. Chapter	11/21/16	Leslie Amason		Event	PCMA		5
- 8 10155	Hollywood Gala	ASK Childhood Cancer Foundation	09/13/15			Event			\$2
9 10657	Croaker's Spot Hollywood	Croaker's Spot	06/29/16			Proposal			\$13
- 10 6456	Hollywood Promo for Shula's	Tidewater Productions	10/17/10			Event			\$2
- 11 6865	Hollywood Dance	Tomahawk Creek Middle School	06/03/11			Expired	The School	×	\$33
- 12 9280	Garthwell Goes Hollywood	Garth Newel Music Center	04/26/14			Expired		×	\$50
- 13 8729	HOLLYWOOD THEME - USO - Drop Off	Sheraton Pentagon City Hotel	10/11/12	Ted Rubis		Expired	Sheraton National Hotel (Pentagon)	X	\$93
- 14 11104	A Red Carpet Night In Hollywood Prom	Charles City County High School	05/05/17			Event	Eastern Henrico Rec Center		\$1,1
- 15 7985	Hollywood Red Carpet	Marriott - Key Bridge	06/15/12	Ted Rubis		Event	key Bridge Marriott - Hollywood Red		\$73
- 16 8711	Hollywood Theme Lighting	CSI - Capitol Services, Inc	05/21/13			Expired	Chesapeake DEF	×	\$1,21
- 17 6729	Hollywood Awards Night	Pure Dymonds Events	06/10/11			Event	The Lesner Inn in VA Beach		\$1,29
- 18 7855	Awards/Hollywood Theme Rentals	Woodrow Wilson High School DC	02/29/12			Event	Woodrow Wilson High School DC		\$1,34
- 19 7722	Hollywood - Red Carpet Affair - Design	AMPA DECORATING KITS - HIGH	01/01/22			Proposal			\$1,17
- 20 12131	Hollywood Red Carpet Party	Chevy Chase Club	02/23/19	Ted Rubis		Proposal			\$1,47
- 21 10181	Hollywood Theme	John Champe High School	10/10/15	Emily Dearing		Event	John Champe		\$1,17
- 22 9038	Hollywood Homecoming	Gwynn Park High School	10/26/13			Expired	Gym at the High School	×	\$1,81

Going to review #22 Hollywood Homecoming

Click on the blue arrow >

JobCharge (FM17s-N File Edit View Insert	Aac-mini.local) Format Records Scripts Windc	ow Help							-
Home	Main Legacy	Calendar Schedule	Admin	Clients	Vendors				
Events/Propo	sals								
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	X	
← 2 7668	Hollywood Prom	Jamestown High School	04/21/12			Expired	Great Wolf Lodge	Х	
← 3 7755	Hollywood Themed Elements - \$2500	Panther Creek High School	04/28/12			Expired		X	
e 4 7941	Hollywood Prom 2012		05/18/12			Expired		Х	
e 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
e 8 10155	Hollywood Gala	ASK Childhood Cancer Foundation	09/13/15			Event			\$20.53
e 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
e 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	X	\$1,810.00
(C)		+ - Standard) EProposa		pload				

Click on Proposal Tab

To review the items that were on the proposal

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K Client	Gwynn Park High School	•	Contact 1 Ira		(a) Contract Hi	story	Record Date	Active?		
Contact	Greer Curry	03/13/13	Title HC		10975 7645	05/19/17 05/17/12	10/17/13	\boxtimes	New	
🖂 Email	greer.curry@pgcps.org	PI	hone/Fax			03/1//12	Status O Proposa	al	Find	
Address 1	13800 Brandywine Road	Þ	🖾 Email 🛙 İla.j	jarrette@pgcps.org			O Event			
Address 2			Contact 2		•		Expired		Billing	
	Brandywine MD 20613	USA	Title				O Out			
	301-372-0140		hone/Fax		_		OIn		Inventory	
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Job# 9038	Event Name Hollywood Homecoming			1	Preferred Contact M	ethod			List	
	Event Date	Start Time	End Time	Service Type H	ow did Client find A				Dupe	
2	Saturday, 10/26/13	7:00 PM 1			Agent Activity	Level Not Happ	ening		Dube	
	Location Gym at the High School				Marketin				Contract ?	
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Under the 'Current Versions' Section Click the blue arrow next to the first section 'I.A'

JobCharge (FM17s-Mac-mini.local)

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🔨 Client	Gwynn Park High School	🕣 🤜 Contact 1	Ira Jarrette	•	Contract Hist	tory 05/19/17		Record Date 10/17/13	Active?	New
Contact	Greer Curry 0	03/13/13 Title	HC 2013		× 10975 × 7645	05/19/17		Status	\boxtimes	
🖂 Email	greer.curry@pgcps.org	Phone/Fax						O Proposal		Find
Address 1	13800 Brandywine Road	🖂 Email	ira.jarrette@pgcps.org					OEvent		
Address 2		Contact 2		•				Expired		Billing
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Loca	ation Gym at the High School		# Name I.A Gold Men and	Columns	Total \$950.00					
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				-	\$1,810.00					
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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

			RSION									Unlock 🛛	Sectio	ns for Job # 9038	
	Job Name				Client Na	me								Name	Total
3	Hollywood Homecoming				Gwynn	Park Hi	igh Scho	ol						A Gold Men and Columns	\$950.00
ection #	Rev. Section Header													A Hollywood St Signs and	\$110.00
	A Gold Men and Columns												× 3	A Delivery	\$750.00
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	nn with Movie Clapboard Kit atic element at over 11ft tall. These heavy duty o	Short			2'x11'		125.00	⊠ 1	25.00	2	Rental	\$250.00 Sort			
													A	e Revision for Section #1, Gold Me	
													Sectio	n Sort Order for Job # 9038	
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														A Hollywood St Signs and	
													~ 3	A Delivery	
												-			
					la la ma		opa MacPro				Total	\$950.00	í –		

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

Job Name									Unlock 🛛	Sections	for Job # 9038	
			Client Nan								Name	Total
Hollywood Homecoming			Gwynn F	Park Hig	gh Schoo	ol					Gold Men and Columns	\$950.00
Rev. Section Header											Hollywood St Signs and	\$110.00
A Gold Men and Columns										~ 3.A	Delivery	\$750.00
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			Created	f hv: Am	ne MacOm	2		Total	\$950.00	≮ 2.A	Hollywood St Signs and	Printout Sort Order
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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	- 🗆 ×	x	
File Edit View Insert Format Records Scripts Window Help (1) (1) (1) (1) (1) New Dupe Form List Inventory Item (1) Stock Order O Build Repair O Rental Creat	Reports ?	Window Help Design & Production Services Label Date 58.5451 ampaevents.com	Home
O2045 Statue: Hollvwood, Award Gold Man Item Type Rental Price 350.00 WH Location Centerpiece Room 3 Type/Category Prop - large Shelf # CP3.2 Lock? Taxable? Repair Description Revenue Type Rental 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	07/17/19	Unlock X Sections for Job # 9038 School Image: School School Image: School	0.00
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To Close the Inventory window – scroll down and click done.

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Shelf # CP3.2 Color silver/gold	50.0401 ampaevenis.com	x
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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, Q		
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Technical Requirements	S 2.A Hollywood St Signs and	\$110.00
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Manufacturer Serial # Cost 750.00 Kit? Parts: Instructions Text Instructions File base / stand		
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5 gold usable	Total	\$1,810.00
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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

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Click DONE to return to the Job Page.

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ECTION 9038.2.A - CURRENT	DEFINITIVE VERSION		Unlock 🛛	Sections for	or Job # 9038	
Job Name		Client Name		#	Name	Total
38 Hollywood Home	coming	Gwynn Park High School			Gold Men and Columns	\$950.00
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A Hollywood St Sign	s and Rope and Stanchion			► 3.A	Delivery	\$750.00
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Click Home to return to the main page.

JobCharge (FM17s-Mac-mini.local)

You can also click ctrl or command +2.

File Edit View Insert Format Rec	ords Scripts Window	Help			
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Client Gwynn Park High School	🕂 🔨 🔨	Ira Jarrette G	Contract History 5 10975 05/19/17	Record Date Active?	New
Contact Greer Curry	03/13/13 Title	HC 2013	\$ 7645 05/17/12	Status	
Email greer.curry@pgcps.org	Phone/Fax			O Proposal	Find
Address 1 13800 Brandywine Road		ira.jarrette@pgcps.org		 Event Expired 	
Address 2 City Brandywine MD 20613	USA Title	Œ		Contract	Billing
City Brandywine MD 20613 Phone/Fax 301-372-0140	1100			Out	
URL	Phone/Fax			OIn	Inventory
ob # Event Name	Cmail			O In with Deposit	List
0038 Hollywood Homecoming		Prefe	erred Contact Method		List
Event Date	Start Time End Tim	e Service Type How o	lid Client find Ampa?		Dupe
Saturday, 10/26/13	7:00 PM 11:00 PM	1	Agent Activity Level Not Happenin	ng	
Location Gym at the High School			Marketing Cue		Contract
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Notes Event Informat	tion Schedule	Proposal Even	t Activities Accour	nting Map	Pick List
Event Date	Start Time End Time	Proposal Sections	Proposal His	istory	
Saturday, 10/26/13	7:00 PM 11:00 PM	Current Versions Previou	Is Versions Version	ion	Delivery Report
		Preview Photo Spelling	Reset 5 10/17	7/13 2:27 PM 🗕 🗅	The Bread
Event Location Same as Clie	ent	🕂 # Name	Total	-	Flag Report
Location Gym at the High School Address 1		5 1.A Gold Men and Columns	\$950.00		
Address 2		S 2.A Hollywood St Signs and S 3.A Delivery	\$110.00 \$750.00		
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Clients and Territory

	JobCharge Custom	ized for:					
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e	MDO 6701 JANWAY RI	D				6	3
	vents HENRICO, VA 23						EnglishComp
	Active Jobs		Active Propo	osals		Reconcilia	ation
Job #	Inv? Job Name	Туре	Client	Date		Location	Agent
12404	Office Decor	Design &	King & Spalding	12/02/19	3:00 PM		Heather Ernst
K 12675	Holiday Party - DAY 1		Quad C	12/10/19		The Dairy Barn at Verdant Lawn	Ted Rubis
 12682 12692 	Winter Holiday Party Holiday Party - DAY 2		Capital City Events CCE Quad C	12/20/19 12/20/19	1:00 AM	2553 Dulles View Drive, Herndon The Dairy Barn at Verdant Lawn	Ted Rubis Ted Rubis
12692	Santa Photo Op	Rental w/	Strauss Marketing PR	12/20/19	3:00 PM	N. Bethesda Market Plaza,	Leslie Amason
× 12703	Additional Equipment TBD	i contar w	Strauss Marketing	12/21/19		N. Bethesda Market Plaza	Leslie Amason
× 12685	New Year's Eve	Rental w/	Hilton Norfolk The Main	12/30/19	0.0011	Hilton Norfolk The Main	Heather Ernst
% 12701	Gatzby Roaring 20s	Rental w/	Drive Shack	12/31/19		Drive Shack	Ted Rubis
% 12706	Wardman Park Marriott		American University	01/02/20		Wardman Park Marriott	Ted Rubis
% 12721	Lounge Furniture: Exec	Rental w/	Mars Inc (M&M Mars Head			Mars Inc (M&M Mars Head	Ted Rubis
\$ 12621	Havana Nights	Rental w/	CIS Secure Computing	01/11/20		WESTFIELD MARRIOTT	Ted Rubis
12709	Hollywood Theme Club	Plat III	Army Navy Country Club	01/12/20	6:30 PM	Army Navy Country Club	Ted Rubis
1263912509	Gala 2020	Pick Up	The Paramount Theater	01/24/20 01/25/20		The Paramount Theater Ches Convention Center	Leslie Amason Ted Rubis
× 12509 × 12671	Sequins & Spurs	Design &	Chesapeake Regional Montpelier Center for Arts	02/22/20	6:30 PM	Montpelier Center for Arts	Jane Raine
12695	Captain's Ball		CNU - Christopher Newport		0.501 14	Student Union Lobby, Ballroom,	Leslie Amason
12332	Prom 2020 w/10% Equipmen	nt Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Heather Ernst

Click Clients or ctrl / command + 4

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12703 12703 12730 12730 12685 12701	Santa Photo Op		Quad C	12/20/19	1.00 AM	The Dairy Barn at Verdant Lawn	Ted Rubis
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12685 2 12701 2	IAdditional Edulpment TBD	i territar in	Strauss Marketing	12/21/19		N. Bethesda Market Plaza	Leslie Amason
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s 12721 D	Lounge Furniture: Exec	Rental w/	Mars Inc (M&M Mars Head	01/06/20		Mars Inc (M&M Mars Head	Ted Rubis
s 12621 🛛	Havana Nights	Rental w/	CIS Secure Computing	01/11/20	6:00 PM	WESTFIELD MARRIOTT	Ted Rubis
5 12709	Hollywood Theme Club		Army Navy Country Club	01/12/20	6:30 PM	Army Navy Country Club	Ted Rubis
	Gala 2020	Pick Up	The Paramount Theater	01/24/20		The Paramount Theater	Leslie Amason
	Mardi Gras	Design &	Chesapeake Regional	01/25/20		Ches Convention Center	Ted Rubis
	Sequins & Spurs		Montpelier Center for Arts	02/22/20	6:30 PM		Jane Raine
	Captain's Ball	t Dantal/	CNU - Christopher Newport			Student Union Lobby, Ballroom,	Leslie Amason
12332	Prom 2020 w/10% Equipmen	t Rental w/	Manchester High School	05/02/20		Doubletree Hilton - Koger Street	Heather Ernst

JobCharge (FM17s-Mac-mini.local) _ × File Edit View Insert Format Records Scripts Window Help ~ Schedule Vendors Home Legacy Calendar Admin Inventory Clients Show Active Only Clients Active? Keep? Agent Client# Client Name Contact Contact Phone Contact Cell Phone Client Type Client List Region Category Phone Fax AIPLFHospitalty for ABA LI/LO XX ← 1 00153 High School -ISES MD NOVA Not for Profit 703-412-4357 Iris Howell 703-415-0780 \boxtimes 212.461.4083 /212-784 212-967-2590 212-784-6452 ← 2 01784 Karen Caccese Company 20 Ted Rubis ← 3 01986 DMC 703.584.2461 703-499-5462 CSI - Capitol Services, Inc Planner DC Planner 703.584.2460 Nicole Cozier Le 4 02719 Federal Reserve Bank of Richmond Government PCMA Richmond/Peter PCMA 804-697-8159 Bonnie G. Falls 697-8114 XX 5 04891 Midlothian High School High School - School Richmond/Peter HighSchool 804.378.2440 Jennifer Weir Ted Rubis 412-965-4948 757 628-6482 412-965-4948 ← 6 07566 Tidewater Productions Partner Ken Carmichael ← 7 08416 Weinstein JCC Non-profit VA Non-Profit 804 545 8608 Debbie Newman 545-8645 \times \times Eli Ted Rubis DC 202-777-7800 \mathbf{X} ← 8 08733 GEP Washington-Millennium Challenge Corp DMC x Allison Bishop \mathbf{X} + 9 08736 Holly Scheidt 850-529-9925 X Ted Rubis USS Theodore Roosevelt Military 757 443-7868 Hε 10 08737 NOVA 703-979-8632 703-979-9400 \boxtimes Ted Rubis Design Cuisine Caterers Internally 703-979-9400 Sara Giraldo Le \times 11 08738 USS Enterprise 757 444-4938 Military 757 444-4938 Monica Connor ← 12 08745 The Republic of Venezuela (202) 342-2214 (202) 342-6820 ← 13 08747 The Fairfax Hotel at Embassy Row Venue: Historic Hotel DC Venue: hotel (202) 293-2100 Beatrice Baskervill + 14 08748 The Madison - Hilton Hotel Hotel Hotel DC Venue: hotel (202) 862-1600 Jessica Barnes Ted Rubis + 15 08750 National Building Museum Museum Internally DC Not for Profit 202.272.2448 Chris Frame Hε Leslie Amason + 16 08759 Blackdog Catering Company Caterers 757 857-6734 Ted Rubis Richmond/Peter Social / ← 17 08760 The Bellwood Club at the Defense Logistics Agency Social / Venue 804-279-3772 804-279-5022 Deitra Lambert 804-279-3772 804-399-5179 Le «) 1 of 15,794 found +)**P** Standard Detail -Sort 📕 Client List Export Contacts Labels 15,794 Total >

Click Sort button at bottom

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

Home	Main Legacy C	alendar	Schedule Admin Inventory Clients Vendors				Show Active Only				
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1 00153	AIPLFHospitalty for ABA LI/LO	High School -	SULTRECOUS	~		703-415-0780	condict cent from		X	- Agent	
2 01784	Company 20		Current Layout ("Clients_List User") Y Sort Order		ie	212-784-6452		\boxtimes			_
3 01986	CSI - Capitol Services, Inc	DMC	@@ ^ Clear All				703-499-5462			Ted Rubis	_
4 02719	Federal Reserve Bank of Richmond	Government	Active?		ls	697-8114		\boxtimes	X		_
5 04891	Midlothian High School	High School -	Agent_1_#								_
6 07566	Tidewater Productions	Partner	Agent_1_Name Agent_2_Name		ael	757 628-6482	412-965-4948		X	Ted Rubis	_
7 08416	Weinstein JCC	Non-profit	Client_#		an	545-8645			X		_
8 08733	GEP Washington-Millennium Challenge Corp	DMC	Client_Category Client_List		,				X	Ted Rubis	_
9 08736	USS Theodore Roosevelt	Military					850-529-9925			Ted Rubis	_
10 08737	Design Cuisine	Caterers	Ascending order			703-979-9400				Ted Rubis	_
11 08738	USS Enterprise	Military	La O Custom order based on value list <unknown></unknown>		on	757 444 4938		×			_
12 08745	The Republic of Venezuela	-									_
13 08747	The Fairfax Hotel at Embassy Row	Venue: Historic			ervill				X		_
14 08748	The Madison - Hilton Hotel	Hotel	Override field's language for sort English ~		IS				X		_
15 08750	National Building Museum	Museum	✓ Keep records in sorted order SortC	ancel					-	Ted Rubis	_
16 08759	Blackdog Calering Company	Caterers	757 857-6734							Leslie Amason	_
17 08760	The Bellwood Club at the Defense Logistics Agency	Social /	Venue Richmond/Peter Social / 804-279-3772 804-279-5022	Deitra Lambe	#	804-279-3772	804-399-5179			Ted Rubis	_

Double click the item to add it to the sort order

Current Layout ("Clients_Li	st User") 🗡		Sort <u>O</u> rder		
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You can sort by multiple items.

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Home	Main Legacy C	Calendar	Schedule	Admin		ventory Clier	nts Vendors	-
Clients Client #	Client Name	Client Type	Client List Internally	Region MD	Category	Phone	Fax	Contact
8248 20856	Maryland Country Caterers	Caterers			1	301-855-2771		David Benson
8249 20870	Forum Caterers	Caterers	Internally	MD		410-358-1101		Brian Haysbert
- <u>8250</u> 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
<mark>⊢ 8263</mark> 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		

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.

At Ampa we track all outreach activities to clients.

This helps track your goals and keep your coworkers up to date for future outreach.

Client 8253 – click arrow

JobCharge (FM	117s-Mac-mini.local)							
File Edit View I	Insert Format Records Scripts Window	Help						
Home	Main Legacy Ca	alendar	Schedule	Admin		ventory	ts Vendors	
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€ 8248 20856	Maryland Country Caterers	Caterers		MD	outra,	301-855-2771		David Benson
← 8249 20870	Forum Caterers	Caterers	Internally	MD		410-358-1101		Brian Haysbert
e 8250 20872	Manor Tavern	Caterers	Internally	MD		410-771-8155		Terry Lombardi
e 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
e 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		
	of 15,794 found) Detail	θΘ	Sort	Standa	ird 🤳 🤅	🗏 Client List	Export Conta	acts Labels
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You are calling Ken Upton

 JobCharge (FM17s-Mac-mini.local) File Edit View Insert Format Records Scripts Window Help 		- 0	×
Home Main Legacy Calendar	Schedule Admin Inventory Clients Vendors		Keep?
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Client # Client Name 22582 Kens Creative Catering Address 980 Awald Rd City State Zip Contacts MD 21401 USA URL URL Contacts Phone_General * Ken Upton Ken Vpton Client Jobs • Job # Date Job Name	Date 10/12/2017 General Phone General Fax Attive? Image: Correspondence/Act Attriangle Image: Correspondence/Act Cellent Type Client List Region Category Caterors Client called MD Venue: other Agent Agent 2 10/12/2017 Ken@kenscreative kitchen. Image: Correspondence/Act Cell Phone Date Email Default? 10/12/2017 Ken@kenscreative kitchen. Image: Correspondence/Act Image: Correspondence/Act Agent Agent 2 Image: Correspondence/Act Image: Correspondence/Act Agent Agent 2 Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Agent Agent 2 Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Correspondence/Act Image: Co	tivities Employee	
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Click on the date space next to the arrow.

Enter Date

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ile Edit View Insert Format Records Scripts Window Help		F Keep?
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CLIENTS	Date 10/12/2017 Correspondence/Activities	
22582 Kens Creative Catering	General Phone General Fax Active? C Date Activity Employee 410-268-3222 X X 10/12/17 Meeting	
	Client Type Client List Region Category Caterers Client called MD Venue: other \$10/12/17 Phone Call	-
Annapolis MD 21401 USA URL	Agent Agent 2 December 2019	-
Contacts ⊕ First Name Last Name Title Phone_General C	Sun Mon Tue Wed Thu Fri Sat Cell Phone Date Email Default? 24 25 26 27 28 29 30	
Ken Upton	10/12/2017 ken@kenscreative kitchen. 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21	
	22 23 24 25 26 27 28 29 30 31 1 2 3 4 Today: 12/20/2019	
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€ Job # Date Job Name Notes		
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Note that when you enter the date the cursor advances to the activity and autofills your name.

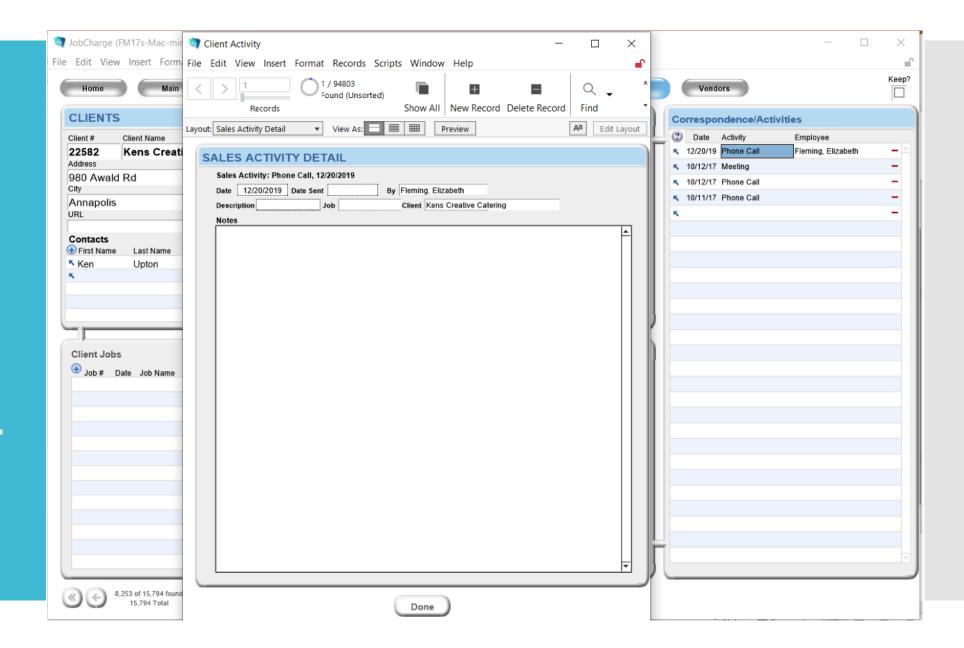
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Address				Client Type	Client List		Category		10/12/17	Phone Call		
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Annapolis		MD 21401							× 12/20/19		Fleming, Elizab	eth
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Click blue arrow next to your activity.

Client # Client Name General Phone C 22582 Kens Creative Catering 410-268-3222 Address Address Client Type Client List 980 Awald Rd Caterers Client called City State Zip Annapolis MD 21401 USA VRL Contacts First Name Last Name ♦ First Name Last Name Title Phone_General Cell Phone Date Contacts Upton 10/12/2017 ken(Region Category MD Venue: o Agent 2 Defauit?	12/20/19	ng e Call Call Fleming, Elizabeth er
Address Client Type Client List 980 Awald Rd City State Zip Country Annapolis MD 21401 USA URL Contacts ♥ First Name Last Name Title Phone_General Cell Phone Date Email Ken Upton 10/12/2017 ken@	Region Category MD Venue: o Agent 2 Defauit?	other 10/12/17 Phone 10/11/17 Phone 12/20/19 Lette Form	e Call E Call Fleming, Elizabeth er
980 Awald Rd City State Zip Country Annapolis MD 21401 USA URL Contacts ⊕ First Name Last Name Title Phone_General Cell Phone Date Email Ken Upton 10/12/2017 ken@	MD Venue: o	other 5 10/11/17 Phone 12/20/19 5 Lette From From	e Call Fleming, Elizabeth er
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Client Jobs	Tax Rate 5.39	376	ign Time
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Enter the details of your conversation.

Then click done.



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

ile File Edit View Insert Format Records Scripts Window Help	Schedule Admin Inventory Clients Vendors	Keep?
Layout: Email Event Preview Aa Edit Layout	Date 10/12/2017 ral Phone General Fax Active? -268-3222 Image: Control of the state of t	
CC Subject Attachment Message	none Date Email Default? 10/12/2017 ken@kenscreative kitchen.	
Date 12/20/2019 Date Sent By Fleming, Elizabeth Description Job Client Kens Creative Done Send	Client List View Legacy Record	



Proposals

	Insert Format Records Scripts Windov							-						
Home	Main Legacy	Calendar	Schedule	Admin	Inv	ventory	Vendors	9		Show Active Only				
Clients Client # 26804	Client Name Kurtz's Beach	Client Type C	Client List	Region Maryland	Category	Phone 410) 255-1280	Fax	Contact	Contact Phone	Contact Cell Phone	Active?	Keep?	Agent Xena Strench	1
15426 26805	R. House	Venue:		MD		(443) 347-3570					\boxtimes		Xena Strench	
15427 26806	Aramark M&T Stadium	Venue: Other		MD		(410) 230-8080					\boxtimes		Xena Strench	
15428 <mark>26807</mark>	Wisp Resort	Venue:		Maryland		(301) 859-3159					\boxtimes		Xena Strench	_
15429 26808											\boxtimes		Xena Strench	
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15431 26810	Blessed Sacrament School	Private Schools C	old Call	NOVA		703-998-4170		Kale Markey			\boxtimes		Karen DeMarir	ino
15432 26811	The Basilica School of Saint Mary	Private Schools C	old Call	NOVA		703-549-1646		Ann Ross			\boxtimes		Karen DeMarir	ino
15433 26812	The Longwood Center for the Visual Arts	Non-profit				434-395-2206		Rachel Ivies			\boxtimes		Leslie Amason	n
15434 26813	Washington and Lee University	College/Universi In	nternally	VA - South	School	(540) 458-8400					\boxtimes		Leslie Amason	n
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15436 26815	Gravatt Entertainment					540-455-3383		Will Gravatt			\boxtimes		Heather Ernst	t
15437 26816	St. Anthony of Padua Catholic School			NOVA		703-820-7111		Edward Andercheck			\boxtimes		Karen DeMarir	ino
15438 26817	St. Joseph School	Catholic PreK - C	old Call	NOVA		703-880-4350		Monique Tuttle			\boxtimes		Leslie Amason	n
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15440 26819	All Saints Catholic School	Private Schools C	old Call	NOVA		703-368-4400		Janis DeVore			\boxtimes		Karen DeMarir	ino
15441 26820	Urban One	Media PR				301-429-3200					\boxtimes		Karen DeMarir	ino
15442 26821	Leviton	Corporation C	Cold Call	Philadelphia		412-464-1957		Ron Mushinsky					Karen DeMarin	ino

Click Clients

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

Do a search for 'Goatopia'

©© <	1 of 1 found 15,794 Total	∂ ⊗	Detail	θΘ	Sort P Standard	Glient List	Export Contacts	Labels	

You can review previous jobs or create a new job.

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Duplication

Click the job you wish to duplicate.

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On the job you wish to duplicate click 'Records' across the top. IobCharge (FM17s-Mac-mini local)

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JobCharge (FM17s-Mac-mini.local)

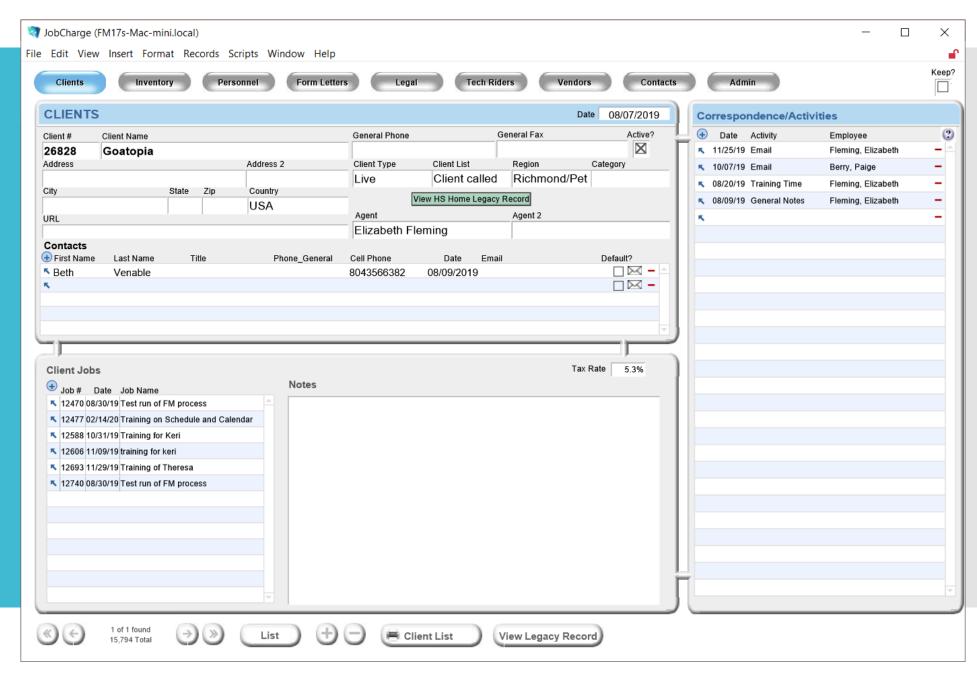
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When you return to client screen you will notice that the job has duplicated. #12740



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.

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

Clients Inventory Personnel Form Letters Legal Tech Riders Vendors Contacts Admin CLIENTS Date 08/07/2019 Date 08/07/2019 Correspondence/Activities Client # Client Name General Phone General Fax Active?	🤕 JobCharge (FM17s-Mac-mini.local)		- 0	×
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	12740 08/30/19 Test run of FM process			

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

IobCharge (FM17s-Mac-mini.local)

Client information needs to be filled in.

Then filling in the tabs.

Image: Design & Production Services Label Date BOD.358.5451 Campaevents.com Find Agent 2 Client Goatopia Social 1 Contact 1 Social 1 Record Date Contact Beth Venable 08/09/19 Title Contact 1 Social 1 Socia	Construct.
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Notes Section is for IN HOUSE use.

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Fill in AS MUCH information as you can prior to submitting proposal. IobCharge (FM17s-Mac-mini local)

Pre-production will gather missing information when event books.

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The Schedule tab is where work orders as needed will be assigned. IobCharge (EM17s-Mac-mini local)

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.

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t Goatopia	Contact 1 09/19 Title Phone/Fax Email	Contract History Contract History 12477 02/14/20 12693 11/29/19 12606 11/09/19 12588 10/31/19	Record Date Active? 12/20/19 New Status O Proposal O Event	
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The Proposal tab is where you will spend the most of your time.

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To begin adding inventory items click the +

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	Goatopia		•	Contact 1		•	Contract Hist	02/14/20	Record Date 12/20/19		New		
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12741	New Eve						ed Contact Met						
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A new window will open on top of the Job.

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Name your section header.

Use the Narrative to make special notes.

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Click 'Find' to begin searching for inventory items.

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Notes		Created by: Elizat 12/21 Modified by: Eliza 12/21	beth Fleming 1/19 beth Fleming Discount %	Total Tax count Total	ſ		
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Type in a descriptor – or if you are choosing from website the SKU number.

Hit continue to bring up a list.

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Item		Contin	ue					Category	LxWxH	Color			
chair	rs							Q	Q	Q		Q	
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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.

ব্ব Inventory Find File Edit View Insert Format Records Scripts Window	Help				_
tem Close Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quantit
Adirondack Chairs Parts	Material			\$75.00	
Chairs: Teak	Furniture	27 x 20 x 34	Teak	\$75.00	
Chairs: Wood Bistro (Wood Slat)	Furniture	27 x 35 x 26	wood/ mixed	\$25.00	2
Chairs: Adirondack	Furniture: Lounge	36 x 48 x 26	wood finish	\$75.00	1
Chairs: Loft Chair	Furniture: Lounae	36" x 36" x 33"	white	\$175.00	
Chairs: Matrix Chair Black	Furniture: Lounge	45" x 36" x 30"	Black	\$150.00	
Chairs: Novelle Club Chair	Furniture: Lounge	32 x 32 x 29	Brown	\$150.00	
Chairs: Gold Throne with Red Velvet	Furniture	36" x 62" x 24"	red/ aold	\$475.00	
Chairs: Black Leather Samsonite Recliner	Furniture: Lounge	35 x 39 x 24		\$175.00	
Chairs: Chiavari Mahogany	Furniture	16 x 36 x 16		\$7.50	
Chairs: Ghost Chair Clear Polycarbonate	Furniture: Lounge	21 x 36 x 22	clear	\$22.50	64
Chairs: Damask	Furniture: Lounae	26.5 x 42 x 29	White/ Black	\$150.00	
Chairs: Rattan Malibu	Furniture: Lounae	33.5 x 25 x 33.5	espresso/white	\$175.00	į
Chairs: Split Back White	Furniture: Lounae	35" x 35" x 30"	White/ Ivorv	\$175.00	
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	
Chairs: Prague	Furniture: Lounae	35 x 33 x 31	white	\$195.00	
Chairs: King Throne Lion Detail	Furniture	38" x 75.5" x 30"	dark brown	\$475.00	
Furniture: Cube Sofa Seating Group w/ Damask Chairs	PROPOSAL ITEM	30 X 13.3 X 30		\$1600.00	
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			white/arav	\$150.00	
Chairs: Aluminum Bistro QS	Furniture: Lounae	31 x 41 x 26 24" x 28.5" x 21.75"	silver	\$35.00	
	Furniture	24 X 28.3 X 21.73			
Lounge: Double Cube Seating Group G w/ Bubble Chairs	PROPOSAL ITEM	070500	Various	\$1800.00	
Chairs: Metro Black Metal Arm Chair	Furniture: Lounae	27 x 35 x 26	black	\$25.00	3
Chairs: Gilded Red Right & Left Pair	Furniture	26 x 43.5 x 25	14/1-1 / 1	\$375.00	
Chairs: Barcelona White w/ Polished Steel	Furniture	33 x 34 x 30	White/ Ivorv	\$175.00	
Chairs: Glow Bubble	Furniture: Lounae	36 x 30 x 36	white	\$150.00	1
Chairs: Black Link Powell	Furniture	26.5 x 39 x 24	black/ white	\$150.00	
Chairs: Barcelona Wooden Slat	Furniture	26 x 31.5 x 28		\$150.00	1
Chairs: Barcelona Black w/ Polished Steel	Furniture	33 x 34 x 30	black	\$175.00	
Chairs: Metro Metal Arm Chair, Gun Metal with Wood Seat	Furniture	20 x 31 x 22		\$27.50	2
Chairs: Java Aviator Chair (Bomber)	Furniture	33.5 x 27.50 x 38.5	BROWN	\$375.00	
Chairs: Simon Club Chair	Furniture	28.25 x 33 x 25.5	BROWN	\$150.00	
Furniture: Cube Sofa Group w/ Lit Bubble Chairs	PROPOSAL ITEM	X X		\$1600.00	
Chairs: Metro Metal Arm Chair White	Furniture	27" x 35" x 26"	white	\$25.00	4
Furniture: Cube Sofa Group w/ Barcelona Chairs White	Furniture	XX	white	\$1600.00	
Chairs: Mahogany Saddle Seat Stool	Furniture	16.5 x 18 x 13		\$75.00	
For Sale: Chairs: Barcelona Wooden Slat	Furniture	26 x 31.5 x 28		\$150.00	
Chairs: Metro Metal Arm Chair - Red	Furniture	27 x 35 x 26		\$35.00	3
Chairs: Arm Chair, Turquoise/Silver	Furniture: Lounae	22 x 39 x 24	Turauoise/Silver	\$150.00	
Chairs: Arm Chair, Orange/White	Furniture: Lounae	23 x 36 x 23	Orange/White	\$150.00	
Chairs: Cane Arm Chair, Black Antique, White Cushion	Furniture	X X	black-brown	\$275.00	
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	[

Items in **RED**

These may need: -Repair -Sub-Rental -Builds -Graphics

But I am choosing Novelle Club Chair

File F	dit View Insert Format Records Scripts Window	Help				<u>م</u>
tem	Close Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quanti
Adiror	ndack Chairs Parts	Material			\$75.00	
	s: Teak	Furniture	27 x 20 x 34	Teak	\$75.00	
	: Wood Bistro (Wood Slat)	Furniture	27 x 35 x 26	wood/ mixed	\$25.00	2
	S: Adirondack	Furniture: Lounae	36 x 48 x 26	wood finish	\$75.00	1
	S: Loft Chair	Furniture: Lounge	36" x 36" x 33"	white	\$175.00	
	: Matrix Chair Black	Furniture: Lounge	45" x 36" x 30"	Black	\$150.00	
	S: Novelle Club Chair	Furniture: Lounae	32 x 32 x 29	Brown	\$150.00	
	: Gold Throne with Red Velvet	Furniture	36" x 62" x 24"	red/ aold	\$475.00	
	Black Leather Samsonite Recliner	Furniture: Lounae	35 x 39 x 24		\$175.00	
	S: Chiavari Mahogany	Furniture	16 x 36 x 16		\$7.50	
	: Ghost Chair Clear Polycarbonate	Furniture: Lounae	21 x 36 x 22	clear	\$22.50	6
	: Damask	Furniture: Lounae	26.5 x 42 x 29	White/ Black	\$150.00	
	s: Rattan Malibu	Furniture: Lounae	33.5 x 25 x 33.5	espresso/white	\$175.00	
	S Split Back White	Furniture: Lounae	35" x 35" x 30"	White/ Ivorv	\$175.00	
	ure: Cube Sofa Group w/ Glow Bubble Chairs	PROPOSAL ITEM	Furniture: Cube Sofa		\$1600.00	
	S: Polka Dot High Back	Furniture: Lounge	25.5 x 38 x 27.5		\$175.00	
	s: Praque		35 x 33 x 31	white	\$195.00	
	S: King Throne Lion Detail	Furniture: Lounae Furniture	38" x 75.5" x 30"	dark brown	\$475.00	
	ure: Cube Sofa Seating Group w/ Damask Chairs	PROPOSAL ITEM	30 X / 3.3 X 30		\$1600.00	
			20 Ell y 20ll y 20 Ell			
	: Powers Taupe Chair QS	Furniture	28.5" x 38" x 26.5"		\$150.00	
	: French Country Truffle QS	Furniture	31" x 41" x 26"	1.5.7	\$150.00	
	: French Country Taupe	Furniture: Lounae	31 x 41 x 26	white/grav	\$150.00	
	s: Aluminum Bistro QS	Furniture	24" x 28.5" x 21.75"	silver	\$35.00	
	e: Double Cube Seating Group G w/ Bubble Chairs	PROPOSAL ITEM		Various	\$1800.00	
	s: Metro Black Metal Arm Chair	Furniture: Lounae	27 x 35 x 26	black	\$25.00	
	s: Gilded Red Right & Left Pair	Furniture	26 x 43.5 x 25		\$375.00	
	s: Barcelona White w/ Polished Steel	Furniture	33 x 34 x 30	White/ Ivorv	\$175.00	
	s: Glow Bubble	Furniture: Lounae	36 x 30 x 36	white	\$150.00	
	s: Black Link Powell	Furniture	26.5 x 39 x 24	black/ white	\$150.00	
Chairs	s: Barcelona Wooden Slat	Furniture	26 x 31.5 x 28		\$150.00	
Chairs	s: Barcelona Black w/ Polished Steel	Furniture	33 x 34 x 30	black	\$175.00	
	s: Metro Metal Arm Chair, Gun Metal with Wood Seat	Furniture	20 x 31 x 22		\$27.50	2
Chairs	s: Java Aviator Chair (Bomber)	Furniture	33.5 x 27.50 x 38.5	BROWN	\$375.00	
Chairs	s: Simon Club Chair	Furniture	28.25 x 33 x 25.5	BROWN	\$150.00	
Furnit	ure: Cube Sofa Group w/ Lit Bubble Chairs	PROPOSAL ITEM	X X		\$1600.00	
Chairs	s: Metro Metal Arm Chair White	Furniture	27" x 35" x 26"	white	\$25.00	4
Furnit	ure: Cube Sofa Group w/ Barcelona Chairs White	Furniture	ХХ	white	\$1600.00	
Chairs	s: Mahogany Saddle Seat Stool	Furniture	16.5 x 18 x 13		\$75.00	
For Sa	ale: Chairs: Barcelona Wooden Slat	Furniture	26 x 31.5 x 28		\$150.00	
Chairs	s: Metro Metal Arm Chair - Red	Furniture	27 x 35 x 26		\$35.00	3
Chairs	s: Arm Chair, Turquoise/Silver	Furniture: Lounae	22 x 39 x 24	Turauoise/Silver	\$150.00	
Chairs	s: Arm Chair, Orange/White	Furniture: Lounae	23 x 36 x 23	Orange/White	\$150.00	
Chairs	s: Cane Arm Chair, Black Antique, White Cushion	Furniture	XX	black-brown	\$275.00	
Loung	e Seating Group: Split Back w/ Damask Chairs		хх		\$1500.00	
	: Leather Sling Chair, Brown	Furniture: Lounge	29 x 33 x 29	BROWN	\$150.00	

You can see that this is added to your proposal.

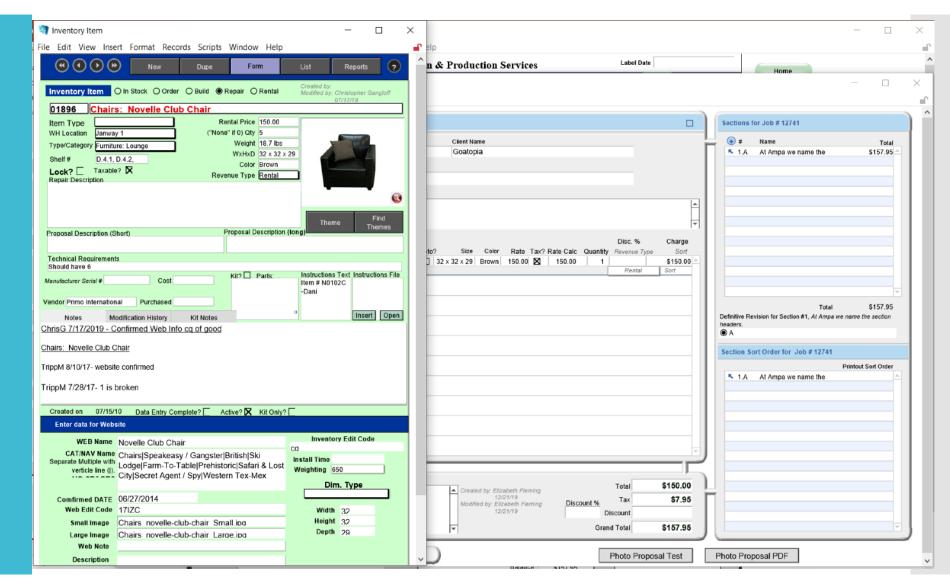
Adjust Quantities if applicable.

CHECK NOW to see why it is in red.

Job # Job Name Client Name 12741 New Event Goatopia Section # Rev. Section Header A At Ampa we name the section headers. At Ampa we name the section headers. Marrative Description CHOSE NAMES THAT MAKE SENSE ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR & DELIVERY 	
Section # • Rev. Section Header A At Ampa we name the section headers. Narrative Description HOOSE NAMES THAT MAKE SENSE	
A At Ampa we name the section headers. Narrative Description IOOSE NAMES THAT MAKE SENSE	
OOSE NAMES THAT MAKE SENSE	
n Filter Find	Disc. % Charge
Item Description Display Flag? Photo? Size Color Rate Tax? Rate Calc Quantity R	
Chairs: Novelle Club Chair Short C Long X II 32 x 32 x 29 Brown 150.00 X 150.00 1	\$150.00
9	Rental Sort
	Definitive Revision for Section #1, At Ampa we name the section headers.
	Section Sort Order for Job # 12741
	Printout Sort Order 1.A At Ampa we name the
	v
Greated by: Elizabeth Fleming	Total \$150.00
	Tax \$7.95
10/01/40	18x 01.00

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 I we are good to go!



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	- 🗆 X
ile Edit View Insert Format Records Scripts Window He	elp 💕
WH Location Janway 1 ("None" if 0) Qty 5	
Type/Category Furniture: Lounge Weight 18.7	
Shelf # D.4.1, D.4.2, WxHxD 32 x	
Lock? Taxable? X Color Brow Revenue Type Rent	
Repair Description	
	<u>@</u>
	Theme Find Themes
Proposal Description (Short) Proposal Descrip	btion (long)
Technical Requirements Should have 6	
Manufacturer Serial # Cost Kit? Parts:	
	Item # N0102C -Dani
Vendor Primo International Purchased	
Notes Modification History Kit Notes	0 Insert Open
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 O	only?
Enter data for Website	
WEB Name Novelle Club Chair	Inventory Edit Code
CAT/NAV Name Chairs/Speakeasy / Gangster/British/Ski	ca
Separate Multiple with Lodge/Farm-To-Table/Prehistoric/Safari & Li	Install Time Ost Weighting 650
City Secret Agent / Spy Western Tex-Mex	
	Dim. Type
Comfirmed DATE 06/27/2014 Web Edit Code 17/ZC	Width oo
Small Image Chairs novelle-club-chair Small.ipg	Width 32 Height 32
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(A) (A) 1 of 1 found 8 652 Total (A)	Done
8,652 Total Cablers	

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

I want a Santa's Workshop Set.

SECTION 12741.2.A - CURRENT DEFINITIVE V	ERSION				S	ections for Job # 12741		
Job # Job Name		Client Name			닅	🕀 # Name		Total
12741 New Event		Goatopia				🔨 1.A 🛛 At Ampa we nar	me the s	6157.95
(+) Section # (+) Rev. Section Header						5 2.A Stage Set	1	\$816.08
2 A Stage Set								
S Narrative Description						_		
Inventory Find				- 0	×			
File Edit View Insert Format Records Scripts Window					-			
Close Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quant	ity		
Prop: Santa's Sleigh, Burgundy	Christmas	48 x 48 x 96	Buraundv	\$750.00		1		
Sign: Santa's Work Shop	Sian	400 00 10		\$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	0	\$1800.00		-	Total \$	6974.03
Sign: Street Sign; Santa Monica Blvd, (L.A.). (Metal)	Sian	24 x 6 x .25	Green/White	\$10.00		1 1 live Revision for Section #2	Claure Cel	
Sign: Street Sign; Santa Claus Ln. (Christmas). (Coroplast)	Sian	24 x 6 x .25	red/white	\$10.00		1 uve Revision for Section #2	, stage set	
Set Part: Front Flats, Santa's Workshop	StageSet Part	X X				2		
Set Part: Back Flats, Santa's Workshop	StageSet Part	X X				on Sort Order for Job	# 12741	
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	Printout So	rt Order
Set Part: Door, Santa's Workshop	StageSet Part	X X				1 1.A At Ampa we nam 2 2.A Stage Set	ne the	
Set Part: Roof Panels, Santa's Workshop	StageSet Part	X X				Z Z.M Stage Set		
Set Part: Front Roof Edges, Santa's Workshop	StageSet Part StageSet Part	X X				2		
Set Part: Back Roof Edges, Santa's Workshop		X X				2		
Set Part: Side Roof Edges, Santa's Workshop	StageSet Part StageSet Part	X X				1		
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click on tien to add to current section.								
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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 Deta			- 🗆 ×
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You can see the conflicts with another job.

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

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SECTION 12741.2.A - CUR	RENT DEFINITIVE VERSION			ections for Job # 12741	
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	Done	Photo Prop	posal Test Pho	oto Proposal PDF	

Go back to your Job Window.

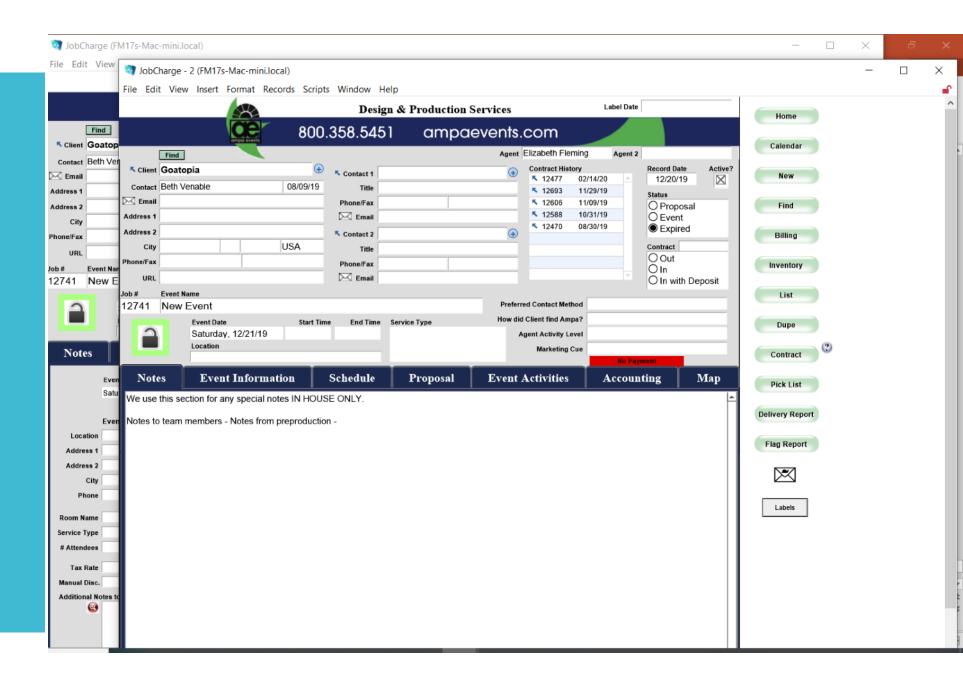
Click on the Window Tab for a drop down menu.

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

JobCha	arge (FM17s-Mac-mini.local)			- L X
ile Edit	View Insert Format Records Scripts	Window Help		
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K Client G	Goatopia 🕣	Tile Horizontally Shift+F4	Contract History Record Date Active?	New
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Tax Rat Manual Dise Additional I	es 5.30% sc. Notes to be printed at end of Proposal/Contract:	Total Deposit Required	\$974.03	

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

Use your search function in this window.



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

		M17s-Mac-m	ini.local)													_		×	
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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.

					Desi	ign & Production Se	rvices		Label Date			Home	
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lob #	Event Name	Job# E	Event Name									List	
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Not	es Event Informati	Notes	s Event Informa	tion s	Schedule	Proposal	Event 4	Activities	Accoun	ting	Map	Pick List	
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Close down extra window (X is fine) and continue adding inventory items.

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

SECTION	N 12741.2.A - CURREN	T DEFINITIVE VERSIO	N					Sections for Job # 12741			
Job #	Job Name		Client N	ame			1	🕀 # Name	Total		
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To Remove an item from a proposal use Shift+Click

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SECTION 12741.2.A - CURRENT I	DEFINITIVE VERSION	# 12741
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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.

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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.

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Section Revisions

We no longer want the Club Chairs initially chosen.

Edit View														
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ŧ		Job Name				Client Name					닅	(+) #	Name	Total
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Hover over the + sign

Click to create a revision

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ĺ	Job # 12741	Job Name New Event		Client Name Goatopia				Name At Ampa we name the	Total \$157.95			
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Now the Section is I.B instead of I.A

Time to search for new chairs

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SECTION 12741.1.B - CURREN		Sections for Job # 12741
	Client Name	
ob # Job Name 2741 New Event	Goatopia	Image: marked black Total Image: marked black \$157.95
+ Section # + Rev. Section Header		S 2.A Stage Set \$13.16
	e the section headers.	
Narrative Description		
CHOOSE NAMES THAT MAKE SENSE ENTRYWAY - WEST BALLROOM - LIGHTING - L/	LABOR & DELIVERY	
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There is a similar listing.

Simon Club Chair

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SECTION 12741.1.B - CURREN	Item Close Click on Item to add to current Section.	Category	LxWxH	Color	Rental Price	Quantity
	Adirondack Chairs Parts	Material			\$75.00	
Job # Job Name	Chairs: Teak	Furniture	27 x 20 x 34	Teak	\$75.00	4
12741 New Event	Chairs: Wood Bistro (Wood Slat)	Furniture	27 x 35 x 26	wood/ mixed	\$25.00	245
Section # Rev. Section Header	Chairs: Adirondack	Furniture: Lounae	36 x 48 x 26	wood finish	\$75.00	14
1 B At Ampa we name	Chairs: Loft Chair	Furniture: Lounae	36" x 36" x 33"	white	\$175.00	8
B At Ampa we hand	Chairs: Matrix Chair Black	Furniture: Lounge	45" x 36" x 30"	Black	\$150.00	2
Narrative Description	Chairs: Novelle Club Chair	Furniture: Lounae	32 x 32 x 29	Brown	\$150.00	5
CHOOSE NAMES THAT MAKE SENSE	Chairs: Gold Throne with Red Velvet	Furniture	36" x 62" x 24"	red/ aold	\$475.00	1
ENTRYWAY - WEST BALLROOM - LIGHTING - I	Chairs: Black Leather Samsonite Recliner	Furniture: Lounge	35 x 39 x 24		\$175.00	3
	Chairs: Chiavari Mahogany	Furniture	16 x 36 x 16		\$7.50	
Item Filter Find	Chairs: Ghost Chair Clear Polycarbonate	Furniture: Lounae	21 x 36 x 22	clear	\$22.50	64
(Item	Chairs: Damask	Furniture: Lounae	26.5 x 42 x 29	White/ Black	\$150.00	8
Chairs: Novelle Club Chair	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/ Ivorv	\$175.00	8
	Furniture: Cube Sofa Group w/ Glow Bubble Chairs	PROPOSAL ITEM	Furniture: Cube Sofa		\$1600.00	
	Chairs: Polka Dot High Back	Furniture: Lounge	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	16
	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: Lounge	31 x 41 x 26	white/grav	\$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: Lounge	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	Sidolo milito	\$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
lotes	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	ZT X 35 X 20	white	\$1600.00	- 44
	Chairs: Mahogany Saddle Seat Stool	Furniture	16.5 x 18 x 13	white	\$75.00	2
		Furniture	26 x 31.5 x 28		\$150.00	2
	For Sale: Chairs: Barcelona Wooden Slat				\$150.00	36
	Chairs: Metro Metal Arm Chair - Red	Furniture	27 x 35 x 26	Turguoino/Qilu		
	Chairs: Arm Chair, Turquoise/Silver	Furniture: Lounge	22 x 39 x 24	Turauoise/Silver	\$150.00	5
	Chairs: Arm Chair, Orange/White	Furniture: Lounde	23 x 36 x 23	Orange/White	\$150.00	5
	Chairs: Cane Arm Chair, Black Antique, White Cushion	Furniture	XX	black-brown	\$275.00	4
	Lounge Seating Group: Split Back w/ Damask Chairs		X_X 29 x 33 x 29	BROWN	\$1500.00 \$150.00	

Add that – now delete the previous chair.

Job Name New Event ction Header t Ampa we name the s	section headers.	Client Nam Goatopia					(+) #	Name	
ction Header	section headers.	Goatopia	1					rtaine	Total
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On to Installation Fees

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SECTION 12741.3.A - CURRENT DEFINITIVE VERSION		Sections for Job # 12741	
Job # Job Name Client Name		🔿 # Name Total	
12741 New Event Goatopia		1.B At Ampa we name the \$157.95	
🚯 Section # 🕘 Rev. Section Header		\$ 2.A Stage Set \$13.16	
3 A Labor and Delivery		S.A Labor and Delivery \$0.00	
😣 Narrative Description	1.1		
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Item Description Display Flag? Photo? Size Color Rate Tax? Rate Calc Quantity Revenue	ue Type Sort		
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		Total \$171.11	
		Definitive Revision for Section #3, Labor and Delivery A	
		Section Sort Order for Job # 12741	
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	v		
Notes Created by: Elizabeth Fleming Total			
12/21/19 Tax			
Modified by: Elizabeth Fleming Discount % Tax 12/21/19 Discount			
T Grand Total			
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.

DayTwo

- Ask questions!
- Find your Territory using learned search methods
- Prioritize Clients
- Research and prepare for outreach activities

	File Edit Vie	ew Insert Fo	rmat Requests	Scripts Windo	w Help							
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🤕 JobCharge (FM17s-Mac-mini.local)

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.

 JobCharge (FM17s-Mac-mini.local) File Edit View Insert Format Records Scripts Window Help 					×
Calendar Schedule Admin Inventory Clients	Vendors	Show Active Only			^
Client Type Client List Region Category Phone H	Fax Contact	Contact Phone Contact Cell Phone Active?		Agent 2	
Planner: NC NC - Charlotte 704.334.6134	Jackie Corbitt		Ted Rubis	Leslie Amason 🕖 🕅	3
Venue: Hotel Hotel NC - Venue: hotel 336-294-1800	336-855-9991 Sahiid Canawazi	×	Ted Rubis) 🗵	3
Venue: Hotel Hotel NC - Charlotte 704-377-1500	Sam Galoo	M			3
Venue: Hotel Hotel NC 919-872-2323	Sort Records	×) 🗵	
Talent Buyers Internally NC - Charlotte 704-339-0100	Current Layout ("Clients_List User") Y	Sort Order			3
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Venue: Hotel Internally NC - Charlotte 704-354-8220	Agent_1_Name		Ted Rubis		
Venue: Hotel Internally NC - Charlotte 704-501-2510	Agent_2_Name Client_#		Ted Rubis		
Venue: Hotel Internally NC - Charlotte Venue: hotel 704-357-1414	Client_Category				
venue: Hotel NC - Triangle 919-768-6000	Client_List		Ted Rubis		
Venue Hotel NC - 336-379-8000	Ascending order	-	Ted Rubis		
Venue: Hotel NC - 336-852-6450	 <u>D</u>escending order 		Ted Rubis		
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Venue: Hotel NC - Triangle 919-781-7000	Override field's language for		Ted Rubis		
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ii) (+) (-) Sort) (P Standard -) (= Client List)	Keep records in sorted order	Unsort Sort Cancel			
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Slide 85 of 85 디로			🚔 Notes 🛛 📮 Comm	ents 🗉 🔠 🛱 🖵 –	+ 85% E
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You can see that there are 299 Client accounts that are available for contact.

Now research and prioritize.

💐 JobCharge (FN	117s-Mac-mini.local)												_
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← 283 23489	Comfort Inn on the Ocean	Venue: Hotel	Hotel	NC - East	Venue: hotel	252-441-6333		Lindsey			\bowtie		
e 284 16167	Elon University	College/Univer	si School	NC	School	336.278.2000		Carolyn Ent			\boxtimes		
← 285 26350	Oasis Suites Hotel	Venue: Hotel	OBX Wedding	NC - East	Venue: hotel	252 441-5211	252-441-5531				\boxtimes		Cannan Keller
← 286 19314	Ashe Memorial Hospital, Inc.	Hospital	Hospitals	NC		336-846-7101		Patty Parson			\boxtimes		Emily Dearing
+ 287 19340	CaroMont Health Foundation	Hospital	Hospitals	NC		(704) 834-4034					\boxtimes		Emily Dearing
+ 288 19344	Cherry Foundation	Hospital	Hospitals	NC		(919) 731-3417					\boxtimes		Emily Dearing
← 289 19345	Columbus Regional Healthcare Foundation	Hospital	Hospitals	NC		706-660-6115					\boxtimes		Emily Dearing
+ 290 20806	DJ Ben Fellon	DJ	Internally	NC - Triangle				Ben Felton					Emily Dearing
+ 291 24642	Northwest Guilford High School (duplicate)	School	School	NC - Triangle	HighSchool			Kim Dayton					Greg Goszinski
← 292 24643	Southwest Guilford High School	School	School	NC - Triangle		(336) 819-2970		Beth Burroughs					Greg Goszinski
← 293 24544	Ragsdale High School	School	School	NC - Triangle	-	(336) 819-2960		Jennifer Pfeiffer					Greg Goszinski
← 294 24645				-	-								Greg Goszínski
	J. F. Kennedy High School NC	School	School	-	HighSchool	(336) 703-4143		Mis Fendley				_	
← 295 24646	James B. Dudley High School	School	School	-	HighSchool	(336) 370-8130		Ashantae Brooks			\boxtimes		Greg Goszinski
← 296 24647	Early College of Forsyth County	School	School	NC - Triangle	HighSchool	(336) 757-3290		LISA NAKAWATASE			\boxtimes		Greg Goszinski
← 297 12034	Arendell Parrott Academy	High School -	School	NC - West	School	252-522-4222		Betsy Barrow	252-522-4222	×264	\boxtimes		Heather Ernst
← 298 12331	First Flight High School	High School -	School	NC - Triod	School	(252) 449-7000		Ms Meads			\boxtimes		Heather Ernst
e 299 12333	Currituck County High School	High School -	School	NC - East	School	252-453-0014		Jade Bennett		828-319-1115	\boxtimes		Heather Ernst
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Start with #I

Then scroll through using arrows at the bottom.

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

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CLIENTS	5					Date	08/04/2010	Correspondence/Activ	ities	
Client # 09461 Address 222 E. 3rd City Charlotte URL	l St.	otte Center Ci State Zip NC 28202	Country	General Phone 704-377-1500 Client Type Venue: Hotel Agent) Client List	General Fax Region NC - Charlotte Agent 2	Active?	Date Activity 12/06/19 Phone Call 03/07/17 Phone Call 9/29/14 Phone Call	Employee Holland, Darnell	- ^ - -
Contacts	Gatoo Gipner Suit	Title Event Man. 2 Dir of Sales 2	Notes	Cell Phone	Date Emai 08/04/2010 Sam 03/07/2017 kayl 06/03/2015 trace	n.gatoo-				
	1 of 402 found		PSAV prop							
Ś	1 of 402 found 15,794 Total	Θ	List 🕂		nt List	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.

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Kill Devil		USA	-				K 03/02/11 Phone Call			- 1
URL		0.011	Agent		Agent 2		03/01/11 General Notes			- 1
	persetting.com						×			- 1
Contacts First Name	Last Name Title	Phone_General	Cell Phone	Date Emai		Default?				
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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!!!