# 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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<b>×</b> 12473	Chair and Pillow Delivery		Albrecht Events	08/23/19		10300 Mill Run Circle, Owing Mills	-	
<b>%</b> 12187	Wedding at the Mellon- Decor	Design &	Shankar Wedding	09/01/19		Mellon Auditorium	Heather Ernst	
<b>×</b> 12441	Library Event	Design &	Events By TRB	09/06/19		Washington, DC	Heather Ernst	
<b>*</b> 12471	Esto Chandelier Frame Pick		Olivia Spear	09/12/19	8:00 AM	Pick up	Heather Ernst	
<b>\$</b> 12395	Carpet Installation	Rental w/	Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst	
<b>K</b> 12275	Off-site Dinner - Vintage	Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis	
<b>%</b> 12356	Color Me DC		Capital City Events CCE	09/25/19	6:00 PM	Watergate	Ted Rubis	
<b>\$</b> 12355	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis	
<b>%</b> 12186	Literary Awards	Rental w/	Library of Virginia	10/19/19	6:00 PM	Library of Virginia Foundation	Leslie Amason	
<b>%</b> 12442		Planning &	Hunton Andrews Kurth	10/22/19		Shed	Ted Rubis	
<b>%</b> 12367	Halloween - Harry Potter	Design &	Army Navy Country Club	10/25/19			Ted Rubis	
<b>\$</b> 12365	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/08/19		Army Navy Country Club	Ted Rubis	
<b>*</b> 12366		Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis	
<b>*</b> 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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<b>%</b> 12473	Chair and Pillow Delivery		Albrecht Events	08/23/19	10:00 AM	10300 Mill Run Circle, Owing Mills	Ted Rubis 🔺	
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<b>N</b> 12441		Design &	Events By TRB	09/06/19		Washington, DC	Heather Ernst	
<b>N</b> 12471	Esto Chandelier Frame Pick	Pick Up	Olivia Spear	09/12/19	8:00 AM	Pick up	Heather Ernst	
<b>12395</b>		Rental w/	Gensler	09/17/19		202 K Street NW, Washington,	Heather Ernst	
<b>12275</b>	Off-site Dinner - Vintage	Rental w/	MC&A	09/23/19	6:30 PM	Military Aviation Museum 1341	Ted Rubis	
<b>12356</b>	Color Me DC		Capital City Events CCE	09/25/19	6:00 PM	Watergate	Ted Rubis	
<b>12355</b>	RRS Food Show	Design &	RRS Food Service	10/15/19		Meadow Event Park	Ted Rubis	
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<b>%</b> 12366	LUNCH WITH SANTA	Rental w/	Army Navy Country Club	12/15/19		Army Navy Country Club	Ted Rubis	
<b>%</b> 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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Contact Lauren Caruso Barnes 05/07/18 The Managing Director 4 12473 08/23/19 08/15/19 Status Email barnes@albrechtevents.com Phone/Fax 209 Providence Lane City Lansdale PA 19446 USA Title Phone/Fax Contact 2 City Lansdale PA 19446 USA Title Phone/Fax Contact 08/19/19 URL http://www.albrechtevents.com/contact. Email Phone/Fax Preferred Contact Method Phone/Fax Contact Method Phone/Fax 11:00 AM 11:00 AM Location 10300 Mill Run Circle, Owing Mills Md Client find Amp? Agent Activities Accounting Map Pick List Delivery Report Fiday, 08/22/19 10:00 AM 11:00 AM Location Schedule Proposal Event Activities Accounting Map Pick List Delivery Report Fileg Report Eige Report Fileg Report Fil						Agent			- ,			ŗ.,
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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
<del>(</del> - 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

🤕 JobC	harge (FM17s-Mac-mini.local)	)								
File Edi	t View Insert Format Rec	ords Scripts W	indow He	lp						
			Design	n & Production Servic	es	Label	Date		Home	
	œ	800.35	8.5451	l ampaever	nts.com					
	Find				Agent	Ag	ent 2		Calendar	
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	
URL		Þ	🖾 Email				O In with	Deposit		
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 ?	
Not		4 C.1	edule	Durant	ent Activitie		o Payment	Mar		
Not	es Event Informa		leaule	Proposal Ev	ent Activitie		ounting	Map	Pick List	
								<b>^</b>		
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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)

File Edi	t View Insert Format Record	ls Scripts Window	Help							
		Des	ign & Production §	Services		Lat	bel Date			
	<b>C</b>	800.358.54			com					Home
	Find			Agent			Agent 2			Calendar
🔨 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
		SA Title						Contract		
	301-372-0140	Phone/Fax						O Out O In		Inventory
URL		🖂 Email					× 1	O In with D	eposit	
ob #	Event Name			Preferre	ed Contact Met	bod				List
038	Hollywood Homecoming				Client find Am					
2	Event Date Saturday, 10/26/13	Start Time End Time 7:00 PM 11:00 PM			gent Activity Le		ppening	_	- 1	Dupe
	Location	1.001 11 11.001 11			Marketing			·		0
	Gym at the High School						No Pay	ment		Contract
Not	es Event Information	n Schedule	Proposal	Event 2	Activities	A	ccoun	ting	Map	Pick List
	Event Date Sta	art Time End Time								
		:00 PM 11:00 PM	Proposal Sections				osal Hist	-		Delivery Report
			Current Versions	Previous			Versio	n 13 2:27 PM -		
	Event Location Same as Client		Preview Photo	Spelling	Reset					Flag Report
Loca	ation Gym at the High School		# Name I.A Gold Men and	Columns	Total \$950.00					
Addre	ss 1		A Gold Men and S 2.A Hollywood St 5		\$950.00					$\bowtie$
Addre	ess 2		S 3.A Delivery		\$750.00					
	City									Labels
PI	none									
Room N	ame	_								
Service										
# Atten										
	Rate									
Manual	Disc. nal Notes to be printed at end of Proposal/	Contract								
Audition	(a) Notes to be printed at end of Proposal/ (a)	contract:			¥					
				-	\$1,810.00					
			Depos	t Required					V	

### 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
rrative D	escription														
	Compton											<b></b>			
												T			
Filter	Find										Disc. %	Charge			
Item				Flag? Photo?							Revenue Typ				
	e: Award Gold Man	Short	⊖ Long		7ft	silver	350.00	<b>X</b> 3	50.00	2		\$700.00			
			<u></u>				105.00				Rental	Sort			
	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	
															Printout Sort Order
														A Gold Men and Columns	
														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
rintion												
									▲ ▼			
Find								Disc %	Charge			
	Description Display	Flag? Photo?	Size	Color	Rate	Tax? Rate Calc	Quantity					
ward Gold Man									\$700.00			
								Rental	Sort			
rith Movie Clapboard Kit	Short O Long				125.00	125.00	2					
											ort Order for Job # 9038	
										accuoil a	011 01 001 101 000 # 5050	
												Brintout Sort Order
										▲ 1.A	Gold Men and Columns	Printout Sort Order
											Gold Men and Columns Hollywood St Signs and	Printout Sort Order
										≮ 2.A		Printout Sort Order
										≮ 2.A	Hollywood St Signs and	Printout Sort Order
										≮ 2.A	Hollywood St Signs and	Printout Sort Order
										≮ 2.A	Hollywood St Signs and	Printout Sort Order
										≮ 2.A	Hollywood St Signs and	Printout Sort Order
										≮ 2.A	Hollywood St Signs and	Printout Sort Order
										≮ 2.A	Hollywood St Signs and	Printout Sort Order
			Created	f hv: Am	ne MacOm	2		Total	\$950.00	≮ 2.A	Hollywood St Signs and	Printout Sort Order
	Find Find ward Gold Man	Find Description Display ward Gold Man    Short  Long  rith Movie Clapboard Kit   Short  Long	iption Find Description Display Flag? Photo? ward Gold Man Short Long Short Long	iption Find Description Display Flag? Photo? Size ward Gold Man Short O Long 7ft	Iption Find Description Display Flag? Photo? Size Color ward Gold Man Short Clong Ytth Movie Clapboard Kit Short Clong ZX11'	Find     Description Display     Flag?     Photo?     Size     Color     Rate       ward Gold Man          ⓐ Short □ Long □ □ 7ft          □ 7ft          silver 350.00            vth Movie Clapboard Kit          ⑧ Short □ Long □ □ 2×11' 125.00           □ 2×11' 125.00	Find     Description Display     Flag?     Photo?     Size     Color     Rate     Tax?     Rate     Calc       ward Gold Man <ul> <li>Short</li> <li>Long</li> <li>7tt</li> <li>silver</li> <li>350.00</li> <li></li></ul>	iption          Find       Description Display       Flag? Photo?       Size       Color       Rate       Tax?       Rate       Calc       Quantity         ward Gold Man	iption  Find  Description Display Flag? Photo? Size Color Rate Tax? Rate Calc Quantity Revenue Type ward Gold Man  Short Long  Trtt Silver 350.00  Short Long  Short  hort  Short Short  Short  Short  Short  Short  Short  S	ipipion  Find  Description Display Flag? Photo? Size Color Rate Tax? Rate Calc Quantity Revenue Type Sort ward Gold Man  Short \Long  Rental Sort Rental Sort  rtth Movie Clapboard Kit  Short \Long  X1 125.00  X1 125.00  X 125.	Find       Disc. % Charge         vard Gold Man       Short       Long       7tt       silver       350.00       2       \$7700.00         vith Movie Clapboard Kit       © Short       Long       2x11'       125.00       2       \$250.00         element at over 11ft tall. These heavy duty columns have a Clapboard shooting out to the top.       Rentail       Sort	ipition  Find  Disc. % Charge  Description Display Flag? Photo? Size Color Rate Tax? Rate Calc Quantity Revenue Type Sort  ward Gold Man  Short \ Long \ 71t silver 350.00 \ 2 \$550.00 2 \$570.00  Rental Sort  Rental Sort  Tetal Definitive Revision for Section #1, Gold Men  Tetal

# 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
	Theme Find Themes I a photo of this in silver? uctions Text Instructions File		c
Manufacturer Serial #     Cost     750.00     base / stand       Vendor Ampa shop     Purchased         Notes     Modification History     Kit Notes     (The La Kid and for another Americates & stress)       ChrisG 7/17/2019 - Confirmed Web Info cq paint carp     Cost     Cost	Insert Open	350.00         Z         Fierdal         Sort           125.00         Z         \$250.00         Rental         Sort           Total         \$18,810           Definitive Revision for Section #1, Gold Men and Columns	-
ChrisG 9/25/2017 - Confirmed TrippM 8/29/17- Website Prepared		• A	
Created on Data Entry Complete? Active? X Kit Only?		Section Sort Order for Job # 9038           Printout Sort Order for Job # 9038           \$\$\$ 1.A Gold Men and Columns           \$\$ 2.A Hollywood St Signs and           \$\$ 3.A Delivery	der
CAT/NAV Name Statues/Hollywood/Carpet Walkways Install Separate Multiple with			
Comfirmed DATE 7/29/2014 Web Edit Code 17/2D WBZN Small Image Award-Goldman Small ioo Large Image Award-Goldman Large.ioo. hollywood poplet.ipg Web Note Description	Width 24 Height 84 Depth 12	MacPro2 Total \$950.00 7/3 tubis Tax Discount % 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	₽ Window Help	
WH Location Centerpiece Room 3 ("None" If 0) Qty 8	Design & Production Services     Label Date	Home
Type/Category Prop - large Weight 15	58.5451 ampaevents.com	nome
Shelf # CP3.2 Color silver/gold	50.0401 ampaevenis.com	x
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, Q		 
1 in office, not counted in qty because it is the original	Unlock 🛛 Sections for Job # 9038	<u> </u>
Theme Find Themes		
Proposal Description (Short) Proposal Description (long) Incomplete: photo-can we get a photo of this in silver?	School School School	Total \$950.00
Technical Requirements	S 2.A Hollywood St Signs and	\$110.00
	S.A. Delivery	\$750.00
Manufacturer Serial # Cost 750.00 Kit? Parts: Instructions Text Instructions File base / stand		
Vendor Ampa shop Purchased		
(This is a Kit part for another	<b>v</b>	
Notes         Modification History         Kit Notes         Item: officiation (insert)         Open           ChrisG 7/17/2019 - Confirmed Web Info cq paint carp         Carp and the state of the	Disc. % Charge	
	Rate Tax? Rate Calc Quantity Revenue Type Sort	
ChrisG 9/25/2017 - Confirmed	350.00 ⊠ 350.00 2 \$700.00 ≜ Rental Sort	
TrippM 8/29/17- Website Prepared	125.00 🛛 125.00 2 \$250.00	
ChrisG 7/10/2017 - QTY confirmed, repair status updated.	Rental Sort	<b>V</b>
5 gold usable	Total	\$1,810.00
Created on Data Entry Complete? C Active? 🔀 Kit Only?	Definitive Revision for Section #1, Gold Men and	d Columns
Enter data for Website	• • • • • • • • • • • • • • • • • • •	
WEB Name Gold Award Man Inventory Edit Code	Section Sort Order for Job # 9038	
CAT/NAV Name Separate Multiple with Cathers Hollywood Carpet Walkways Install Time	P	Printout Sort Order
verticle line (j). Weighting 100	<ul> <li>K 1.A Gold Men and Columns</li> <li>K 2.A Hollywood St Signs and</li> </ul>	<u> </u>
Dim. Type	S 3.A Delivery	
Comfirmed DATE 7/29/2014		
Web Edit Code 17IZD WBZN Width 24		
Smell Image         Award-Goldman         Small.iba         Height         84           Large Image         Award-Goldman         Large.ibg, hollywood poplet.ibg         Depth         12		
Web Note		
Description		
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	Via Discount % Tax	
	1/16 Discount % Discount	
rev 11/17/2015 2:45:58 PM	Grand Total \$950.00	<b>V</b>
(C) (C) 1 of 1 found 8,652 Total (C) (C) (History Labels Done	·	

#### 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

ECTION	I 9038.2.A - CURRENT DEFI	NITIVE VERSION								Unlock 🛛		Sections f			
#	Job Name			Client Na							H	<b>(#</b>	Name	Total	
3	Hollywood Homecoming	1		Gwynn	Park High So	chool						▲ 1.A	Gold Men and Columns Hollywood St Signs and	\$950.00 \$110.00	
ection #	Rev. Section Header												Delivery	\$750.00	
	A Hollywood St Signs and	Rope and Stanchior	1									Click	to view Workorder #		
rrative Des	scription									1					
										-					
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Filter	Find								Disc. %	Charge					
Item		Description Display			Color Ra			Quantity	Revenue Typ						
Hollywo	ood Street Signs	Short O Long		2476											
				24A0	Green/ 25	.00 🛛	25.00	2	Rantal	\$50.00	-				
		Short O Long		24A0					Rental	Sort					
e Rope a	and Stanchion - 5ft Aluminum	Short ○ Long     Long		2440		.00	25.00	4	Rental Rental			Definitive Re and Stanchic A	Total vision for Section #2, <i>Hollywoo</i> n	\$1,810.00 d St Signs and Rope	4
Rope a		Short ○ Long		2440						Sort \$60.00	<u> </u>	and Stanchic A	vision for Section #2, Hollywoo		•
Rope a		Short ○ Long     Long		2440						Sort \$60.00	<u> </u>	and Stanchic A	vision for Section #2, Hollywood m		•
Rope a		Short ○ Long     Long		2440						Sort \$60.00	<u>h</u>	and Stanchic A Section So 1.A	vision for Section #2, Hollywood m ort Order for Job # 9038 Gold Men and Columns	d St Signs and Rope	×
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Rope a		Short      Long		244.0						Sort \$60.00		and Stanchic A Section So Section So Section So	vision for Section #2, <i>Hollywood</i> on ort Order for Job # 9038 Gold Men and Columns Hollywood St Signs and	d St Signs and Rope	×
Rope a		Short      Long		244.0						Sort \$60.00		and Stanchic A Section So Section So Section So	vision for Section #2, <i>Hollywood</i> on ort Order for Job # 9038 Gold Men and Columns Hollywood St Signs and	d St Signs and Rope	
Rope a		Short      Long			15	.00				Sort \$60.00		and Stanchic A Section So Section So Section So	vision for Section #2, <i>Hollywood</i> on ort Order for Job # 9038 Gold Men and Columns Hollywood St Signs and	d St Signs and Rope	
Rope a		Short      Long		Create		.00 X			Rental	Sort \$60.00 Sort		and Stanchic A Section So Section So Section So	vision for Section #2, <i>Hollywood</i> on ort Order for Job # 9038 Gold Men and Columns Hollywood St Signs and	d St Signs and Rope	

# Click DONE to return to the Job Page.

dit View Insert Format Records S	cripts Window Help					
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
) Section # \ominus Rev. Section Header					Hollywood St Signs and	\$110.00
A Hollywood St Sign	s and Rope and Stanchion			► 3.A	Delivery	\$750.00
Narrative Description						
			<b>▲</b>			
			+			
n Filter Find						
Item	Description Display Flag? Photo?	Size Color Rate Tax? Rate Calc Q	Disc. % Charge uantity Revenue Type Sort			
<ul> <li>Hollywood Street Signs</li> </ul>	Short Clong C	24X6 Green/ 25.00 🛛 25.00	2 \$50.00			
			Rental Sort			
Rope and Stanchion - 5ft Aluminum	Short ○ Long □	15.00 🛛 15.00	4 \$60.00			
				and Stanchio	Total vision for Section #2, Hollywood S m	\$1,810.00 t Signs and Rope
				and Stanchio	vision for Section #2, Hollywood S in ort Order for Job # 9038	t Signs and Rope
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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.

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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	<b>\$</b> 7645 05/17/12	Status	
Email greer.curry@pgcps.org	Phone/Fax			O Proposal	Find
Address 1 13800 Brandywine Road		ira.jarrette@pgcps.org		<ul> <li>Event</li> <li>Expired</li> </ul>	
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
				iyment	
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	
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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
<b>12404</b>	Office Decor	Design &	King & Spalding	12/02/19	3:00 PM		Heather Ernst
<b>K</b> 12675	Holiday Party - DAY 1		Quad C	12/10/19		The Dairy Barn at Verdant Lawn	Ted Rubis
<ul> <li>12682</li> <li>12692</li> </ul>	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
<b>12692</b>	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
<b>%</b> 12701	Gatzby Roaring 20s	Rental w/	Drive Shack	12/31/19		Drive Shack	Ted Rubis
<b>%</b> 12706	Wardman Park Marriott		American University	01/02/20		Wardman Park Marriott	Ted Rubis
<b>%</b> 12721	Lounge Furniture: Exec	Rental w/	Mars Inc (M&M Mars Head			Mars Inc (M&M Mars Head	Ted Rubis
<b>\$</b> 12621	Havana Nights	Rental w/	CIS Secure Computing	01/11/20		WESTFIELD MARRIOTT	Ted Rubis
<b>12709</b>	Hollywood Theme Club	Plat III	Army Navy Country Club	01/12/20	6:30 PM	Army Navy Country Club	Ted Rubis
<ul><li>12639</li><li>12509</li></ul>	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
<b>12695</b>	Captain's Ball		CNU - Christopher Newport		0.501 14	Student Union Lobby, Ballroom,	Leslie Amason
<b>12332</b>	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

*     12404     2       *     12675     2       *     12682     2       *     12692     2       *     12703     2       *     12730     2       *     12685     2       *     12701     2		D	Active Prope Client King & Spalding Quad C Capital City Events CCE	Date 12/02/19		Reconcilia	EnglishComp
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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
12730       12685       12701		Rental w/	Strauss Marketing PR	12/20/19	3:00 PM	N. Bethesda Market Plaza,	Leslie Amason
12685         2           12701         2	IAdditional Edulpment TBD	i territar in	Strauss Marketing	12/21/19		N. Bethesda Market Plaza	Leslie Amason
<b>\$</b> 12701 <b>\$</b>	New Year's Eve	Rental w/	Hilton Norfolk The Main	12/30/19	0.0011	Hilton Norfolk The Main	Heather Ernst
	Gatzby Roaring 20s	Rental w/	Drive Shack	12/31/19		Drive Shack	Ted Rubis
¬ 12/00 ₽	Wardman Park Marriott		American University	01/02/20		Wardman Park Marriott	Ted Rubis
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
<b>5</b> 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
<b>12332</b>	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				
Clients	Client Name	Client Type	Sort Records	×	1	Contact Phone	Contact Cell Phone	Active?	Keen?	Ågent	
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

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# You can sort by multiple items.

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✓ <u>K</u> eep records in sorted order	<u> </u>	<u>J</u> nsort <u>S</u> ort	Cancel	

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)							
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Clients Client #	Client Name	Client Type	Client List	Region	Category	Phone	Fax	Contact
€ 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
<								

# You are calling Ken Upton

<ul> <li>JobCharge (FM17s-Mac-mini.local)</li> <li>File Edit View Insert Format Records Scripts Window Help</li> </ul>		- 0	×
Home Main Legacy Calendar	Schedule Admin Inventory Clients Vendors		Keep?
CLIENTS	Date 10/12/2017 Correspondence/Act	livities	
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?
Home Main Legacy Calendar	Schedule Admin Inventory Clients Vendors	
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	
Client Jobs	Tax Rate 5.3%	
€ Job # Date Job Name Notes		
(a) (c) 8,253 of 15,794 found (c) (b) (List (c)	Client List View Legacy Record	

Note that when you enter the date the cursor advances to the activity and autofills your name.

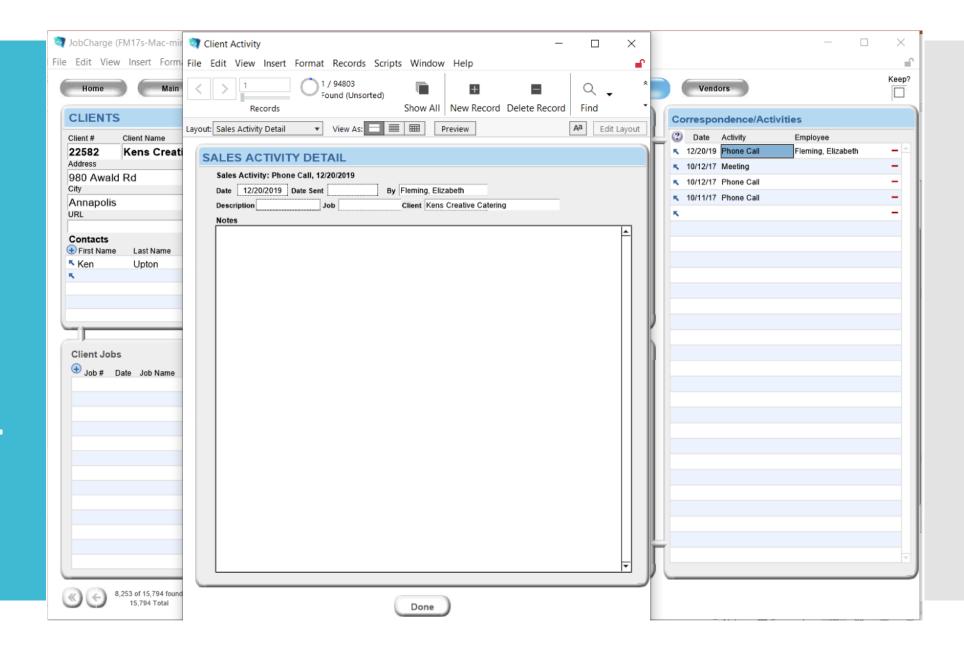
						Date	10/12/2017		Correspo	ndence/Activit	ties	
Client #	Client Name			General Phone	(	General Fax	Active?	1.12	2 Date		Employee	
22582		tive Catering		410-268-32	22				<b>10/12/17</b>	Meeting		
Address				Client Type	Client List		Category		<b>10/12/17</b>	Phone Call		
980 Awalo City	l Rd	State Zip	Country	Caterers	Client called	MD	Venue: other		<b>10/11/17</b>	Phone Call		
Annapolis		MD 21401							× 12/20/19		Fleming, Elizab	eth
JRL			00/1	Agent		Agent 2			κ.	Letter		
-										Form Letter		
Contacts First Name	Last Name	Title	Phone_Gener	al Cell Phone	Date Emai	a	Default?			Email		
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Client Job	s					Tax R	ate 5.3%			Design Time		
	-		Notes					11		Training Time		
JOD # L	Date Job Name		A .									

### 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
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@	Agent 2	12/20/19	Fleming, Elizabeth er
URL Agent Contacts  → First Name Last Name Title Phone_General Cell Phone Date Email Ken Upton 10/12/2017 ken@	Default?	Lette	er
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Ken Upton 10/12/2017 ken@			
		·	ne Call
	kenscreative kitchen.	~ -	
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		Gen	eral Notes
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Client Jobs	Tax Rate 5.39	376	ign Time
Job # Date Job Name     Notes		Train	ning Time

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	
15430 26809	Lynsey Labrin			MD		407.826.0055		Lynsey Labrin			$\boxtimes$		Xena Strench	
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
15435 26814	Angelus Academy	Private Schools C	old Call	NOVA		703-924-3996		BettyJo Lash			$\boxtimes$		Karen DeMarir	ino
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
15439 26818	Siena Academy	Private Schools C	old Call	NOVA		703-759-4129				T	$\boxtimes$		Karen DeMarir	ino
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

🤕 JobCharge (FM17s-Mac-mini.local)									
File Edit View Insert Format Records Scripts Window	Help								
Home Main Legacy C	alendar	Schedule	Admin		Inventory	Clients	Vendors		
Clients									Show
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	<b>∂</b> ⊗	Detail	θΘ	Sort P Standard	Glient List	Export Contacts	Labels	

#### You can review previous jobs or create a new job.

ر 🔊	obCharge (F	M17s-Mac-mini.lo	cal)											I X
File	Edit View	Insert Format	Records Scrip	ots Window Help										<b>_</b>
C	Home	Main	Legac	y Calendar	Schedu	le Admin	Inventory	Client	s		Vendors	)		Keep?
	CLIENTS						Date	08/07/2019			Corresponder	ce/Activi	ities	
C	lient #	Client Name			General Phone	Ge	eneral Fax	Active?		(	2 Date Activi	ły	Employee	
		Goatopia						$\mathbf{X}$	Ш	Ŀ	11/25/19 Emai		Fleming, Elizabeth	
A	ddress				Client Type	Client List		Category	Ш		10/07/19 Emai		Berry, Paige	-
	City	Stat	e Zip	Country	Live	Client called	Richmond/Pet		Ш	Ŀ	<ul> <li>08/20/19 Train</li> </ul>	ng Time	Fleming, Elizabeth	-
Ĩ	<i></i>			USA	-				Ш		<ul> <li>08/09/19 Gene</li> </ul>	ral Notes	Fleming, Elizabeth	-
Ĺ	JRL	ļ		0.011	Agent		Agent 2				ĸ			-
					Elizabeth FI	eming			Ш					
	First Name	Last Name	Title	Phone_General	Cell Phone	Date Email		Default?	Ш					
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		30/19 Test run of FM pr	rocess						Ш					
		4/20 Training on Sche		ır					Ш					
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C	00	1 of 1 found 15,794 Total	)) (	List 🕂		ent List 🔵 🗸	iew Legacy Record	)						

#### You can duplicate previous jobs or create a new job.

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	CLIENTS							Dat	te 08/07/201	19	Cor	rrespondence/Activ	vities	
	Client #	Client Name				General Phone	G	eneral Fax	Active	?	0	Date Activity	Employee	
	26828	Goatopia							$\boxtimes$		8.1	11/25/19 Email	Fleming, Elizabeth	-
	Address					Client Type	Client List	Region	Category	-1	<b>K</b> 1	10/07/19 Email	Berry, Paige	-
	City	State	e Zip	Country		Live	Client called	Richmond/Pet		- 1	κ. (	08/20/19 Training Time	Fleming, Elizabeth	-
				USA							κ. (	08/09/19 General Notes	Fleming, Elizabeth	-
	URL	ļ		10011		Agent		Agent 2		_	<b>K</b> .			-
						Elizabeth Fle	eming							
	First Name	Last Name	Title	Pho	ne_General	Cell Phone	Date Email		Default?					
	Seth	Venable	The	FIIU	le_General	8043566382	08/09/2019							
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	«) (+)	1 of 1 found 15,794 Total	))))	List	) ( <del>)</del>		ent List	iew Legacy Reco	rd)					
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### Duplication

Click the job you wish to duplicate.

JobCharge (FM17s-Mac-mini.local)		- 0	×
File Edit View Insert Format Records Scripts Window Help Home Main Legacy Calendar	Schedule Admin Inventory Clients	Vendors	Keep?
CLIENTS	Date 08/07/2019	orrespondence/Activities	Í
CLIENTS         Client # Client Name         26828 Goatopia         Address         City State Zip Country         USA         URL         Contacts	General Phone     General Fax     Active?       Client Type     Client List     Region     Category       Live     Client called     Richmond/Pet     K	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	
(C) 1 of 1 found 15,794 Total	Client List View Legacy Record		

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

		Desig	gn & Production S	Services		Label Da	ate		Home	
	8	00.358.545	ampae	events.	com					
Find	anpa evens				Elizabeth Fle	eming Agen	t 2		Calendar	
Client Goat		🕂 👗 Contact 1		•	Contract His		Record Date	Active?		
Contact Beth	Venable 08/09	Contact 1			12477 12693	02/14/20	12/20/19	$\boxtimes$	New	
🖂 Email		Phone/Fax			<b>12606</b>	11/09/19	Status Proposal		Find	
Address 1		🖂 Email			<b>12588</b>	10/31/19	OEvent			
Address 2		S Contact 2		$\odot$	12740 12470	08/30/19 08/30/19	O Expired		Billing	
City	USA	Title					Contract O Out			
vhone/Fax		Phone/Fax				~	OIn		Inventory	
	Name						O In with D	eposit	List	
	t run of FM process			Prefer	ed Contact Me	thod			List	
	Location	00 PM 1:00 PM	Down			Level Very Hot			(7)	
	Goatopia				Marketing		Payment		Contract	)
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	Event Information	Schedule	Proposal	Event		No f		Map	Pick List	
	Event Information	Schedule	Proposal	Event		No f		Map	Pick List Delivery Report	
	Event Information	Schedule	Proposal	Event		No f		Map	Pick List Delivery Report Flag Report	
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	Event Information	Schedule	Proposal	Event		No f		Map	Pick List Delivery Report Flag Report	
	Event Information	Schedule	Proposal	Event		No f		Map	Pick List Delivery Report Flag Report	
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	Event Information	Schedule	Proposal	Event		No f		Map	Pick List Delivery Report Flag Report	

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

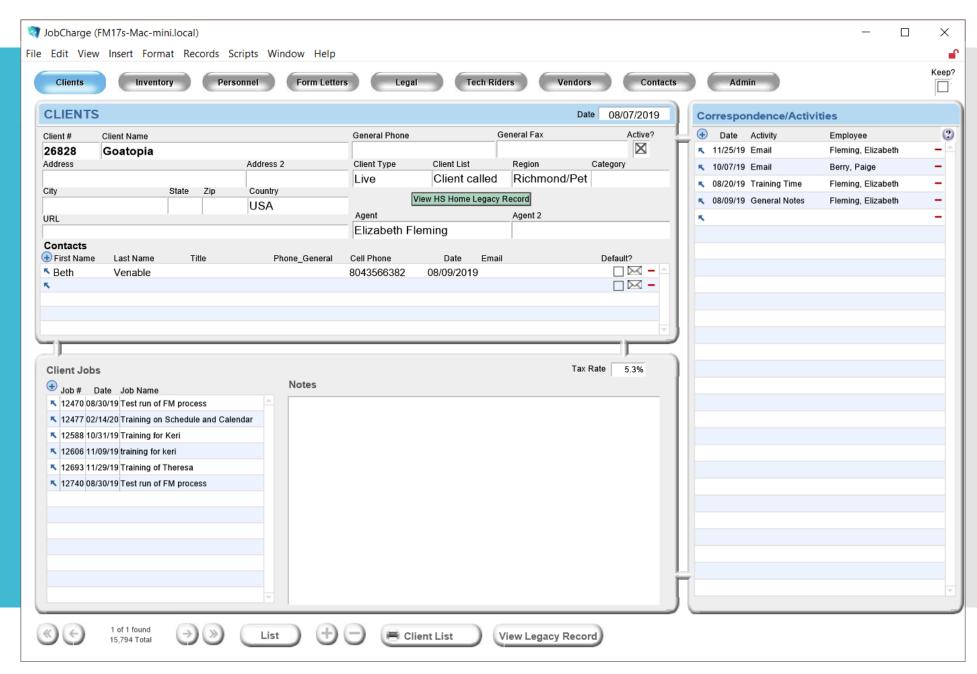
## Chose duplicate record.

		<u>N</u> ew Record Duplic <u>a</u> te Record	Ctrl+N Ctrl+D	uction Services		Labe	bel Date			Home	)
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Fir Client Go		Delete All Records			nt Elizabeth Flemi		Agent 2	Record Date	Active?		
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URL		Modify Last <u>F</u> ind	Ctrl+R					O In with De	eposit		L
	ent Name est run of FM proce	Sa <u>v</u> ed Finds	•		ferred Contact Metho	od				List	)
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2	Friday, 08/30/19			nstall & Take	Agent Activity Leve		ot			l Dape	1
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	L			osai Lven	Activities	AC	coun		wiah	Pick List	)
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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.

			Design	& Production Serv	vices	Label Date	e		Home		
		800.	358.5451	ampaeve	ents.com						
[	Find				Agent Elizabeth Flen	ning Agent 2	,		Calendar		
Client	Goatopia	÷	S Contact 1		Contract Histo	ry 02/14/20	Record Date 12/20/19	Active?	New		
ontact	Beth Venable	08/09/19	Title		× 12477 × 12741	12/20/19	Status				
Email			Phone/Fax		<b>5</b> 12693	11/29/19	Proposal		Find		
Iress 1			🖂 Email		<b>5</b> 12606	11/09/19	O Event				
ress 2			K Contact 2		12588 12740	10/31/19 08/30/19	OExpired		Billing		
City		USA	Title		<b>12470</b>	08/30/19	Contract				
ne/Fax			Phone/Fax				O Out O In		Inventory		
URL			🖂 Email			Υ.	O In with Dep	posit			
	Event Name				Preferred Contact Meth		,		List		
740	Changing Title				How did Client find Amp						
2	Event Date Friday, 08/30/19 Location	Start Time 12:00 PM	1 1:00 PM	<sup>Service Type</sup> Rental w/ Install & Take Down		Very Hot			Dupe	0)	
	Goatopia						ayment		Contract	2)	
Note		tion	Schedule	Proposal	Event Activities		<u> </u>	Map	Contract Pick List	9	
		tion	Schedule	Proposal		No Pa	<u> </u>	vIap _	Pick List	0	
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	es Event Informa	ntion	Schedule	Proposal		No Pa	<u> </u>	ſĬap	Contract Pick List Delivery Report Flag Report	9	

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	×
Clients     Inventory     Personnel     Form Letters     Legal     Tech Riders     Contacts     Admin       Client S     Date     08/07/2019       Client #     Client Name     General Phone     General Fax     Active?       Z6828     Goatopia     General Phone     General Fax     Active?       Z6828     Goatopia     Client Type     Client Type     Client Type       City     State     Zp     Country     Client Called     Richmond/Pet       City     State     Zp     Country     View HS Home Legacy Record       VRL     USA     Agent     Agent 2       Elizabeth Fleming     Elizabeth Fleming     Contacts       © Inst Name     Last Name     Cell Phone     General Cell Phone & Date       Seth     Venable     8043566382     08/09/2019       Notes     Tax Rate     5.3%	File Edit View Insert Format Records Scripts Window Help			<b></b>
Client #       Client Name       General Phone       General Fax       Active?       Image: Client State       Image: Client State	Clients Inventory Personnel Form Letters	Legal Tech Riders Vendors Contacts Admin		Keep?
26828 Goatopia   Address Address 2   Client Type Client List   Region Category   City State   UR USA   Agent Agent   Agent Agent 2   Elizabeth Flerning   Contacts   © First Name   Live   Client You   Wew HS Home Legacy Record   Agent   Belabeth Flerning   Contacts   © First Name   Lizabeth Flerning   Client Jobs   Tax Rale   5.3%     Ø Job # Date Job Name   Notes     Tax Rale   5.3%     Ø Job # Date Job Name     Notes     Tax Rale   5.3%     Ø Job #	CLIENTS	Date 08/07/2019 Correspondence/Activit	ties	
12740 08/30/19 Test run of FM process	Client #       Client Name         26828       Goatopia         Address       Address 2         City       State Zip Country         URL       USA         USA         URL         Ontacts         Image: The state of t	General Phone       General Fax       Active?         Image: Client List       Region       Category         Live       Client called       Richmond/Pet       10/07/19       Email         View HS Home Legacy Record       Agent       Agent 2       08/09/19       General Notes         Cell Phone       Date       Email       Default?         8043566382       08/09/2019       Image: Called College       Image: Called College	Employee Fleming, Elizabeth Berry, Paige Fleming, Elizabeth	
	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.
Find       Agent 2         Find       Contract History       Record Date         Contact Beth Venable       08/09/19       Title       \$ 12477       02/14/20       12/20/19         Status       Status       Status       Status       Status       Status	Antina
Client         Goatopia         Contact 1         Contract History         Record Date           Contact         Beth Venable         08/09/19         Title         \$ 12477         02/14/20         12/20/19           Status         Status         \$ 12477         12/20/19         \$ 12/20/19         \$ 12/20/19	t ative?
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hone/Fax	
None/Fax     Phone/Fax     OIn       URL     Image: Contract of the second s	Donosit
Offi With	Deposit
2741 New Event Preferred Contact Method	
Friday, 12/20/19 Location Marketing Cue No Payment	
NotesEvent InformationScheduleProposalEvent ActivitiesAccounting	Map
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## Notes Section is for IN HOUSE use.

🧃 JobCharge (FM17s-Mac-mini.	local)					- 🗆
File Edit View Insert Format	Records Scripts Window He	elp				
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<b>O</b>	800.358.545	1 ampaevents.	com		Home	
ampa ever	000.000.040			-	Calendar	
Find Client Goatopia	•		Elizabeth Fleming Ager Contract History	Record Date Active?		
Contact Beth Venable	Contact 1 08/09/19 Title	•	12477 02/14/20	12/20/19	New	
	Phone/Fax		12693 11/29/19 12606 11/09/19	Status	Find	
Address 1	Email		<b>5</b> 12588 10/31/19	O Proposal O Event	Find	
Address 2	Contact 2	•	<b>12470</b> 08/30/19	Expired	Billing	
City	USA Title			Contract		
Phone/Fax	Phone/Fax			O Out O In	Inventory	
URL	🖂 Email			O In with Deposit		
Job # Event Name 12741 New Event		Prefer	ed Contact Method		List	
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Event Date	Start Time End Time	Service Type				
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		Service Type	gent Activity Level Marketing Cue	Damant	Contract 2	
Friday, 12/20/19 Location		Service Type	gent Activity Level Marketing Cue	Payment Man	Contract 2	
Friday, 12/20/19           Location           Notes           Event Info	rmation Schedule	Service Type	gent Activity Level Marketing Cue	Payment Dunting Map	2	
Friday, 12/20/19 Location	rmation Schedule	Service Type	gent Activity Level Marketing Cue	Y	Contract 2 Pick List	
Friday, 12/20/19           Location           Notes           Event Info	rmation Schedule	Service Type	gent Activity Level Marketing Cue	Y	Contract 2	
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Friday, 12/20/19       Location       Notes       Event Info       We use this section for any spect	rmation Schedule	Service Type	gent Activity Level Marketing Cue	Y	Contract Pick List Delivery Report Flag Report Č	

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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_	Find		Elizabeth Fleming Agent 2	Calendar
S Client	Casteria		Contract History Record Date Active?	
			▲ 12477 02/14/20	New
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	Height at Door # Entrances			
	Contact/Phone			
	te Parking Info		v Vehicle	
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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.

dit View Insert Format Records	<u> </u>	aevents.com	Home	
Find			Calendar	
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	
2 USA	Contact 2 Title Phone/Fax Email	€ 12470 08/30/19	Expired     Billing     Contract     Out     Oln     OIn     OIn with Deposit	
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es Event Information ↔ Start Date End Date Date Days Type	Schedule         Proposal           Activity         Edit Assignment		rounting Map Pick List	
			Flag Report	
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The Proposal tab is where you will spend the most of your time.

	harge (FM17s-Mac-mini.local)										_	×
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#### To begin adding inventory items click the +

🤕 Job	Charge (FM	17s-Mac-mini.l	local)									-	$\times$
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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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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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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				<b>_</b>
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.

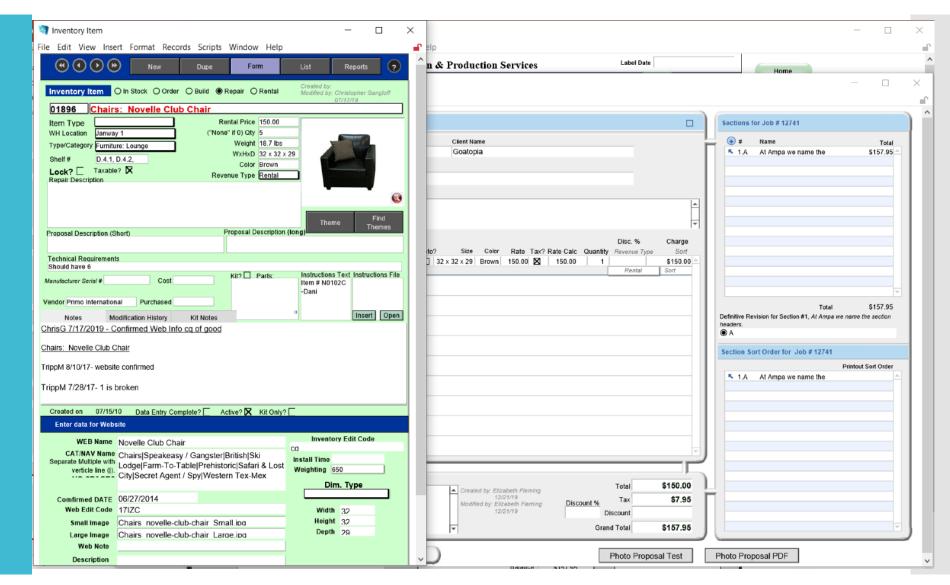
Adjust Quantities if applicable.

CHECK NOW to see why it is in red.

Job #     Job Name     Client Name       12741     New Event     Goatopia <ul> <li>Section #</li> <li>Rev. Section Header</li> <li>A At Ampa we name the section headers.</li> </ul> <ul> <li>At Ampa we name the section headers.</li> </ul> <ul> <li>Marrative Description</li> <li>CHOSE NAMES THAT MAKE SENSE ENTRYWAY - WEST BALLROOM - LIGHTING - LABOR &amp; DELIVERY</li> </ul>	
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
	<b>v</b>
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
Large Image Chairs novelle-club-chair Small.ibd	Depth 29
Web Note	
Description	
	rev 11/17/2015 2:45:58 PM
(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		
Set Part: Chimney. Santa's Workshop Prop: Santa's Sleigh, White	Christmas	x x 48 x 48 x 96		\$750.00		1		
Click on Item to add to current Section.	Uninstinas	40 X 40 X 90		\$750.00		_1		
click on tien to add to current section.								
						Proposal PDF		
								_

#### 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			- 🗆 ×
	Insert Format Records Scri	· ·	
SECTION	12741.2.A - CURRENT	DEFINITIVE VERSION	Sections for Job # 12741
Job # 12741	Job Name New Event	Client Name Goatopia	# Name Total     1.A At Ampa we name the \$157.95 -
,	Rev. Section Header	очнори	\$ 2.A     Stage Set     \$816.08
2	A Stage Set		
😫 Narrative De	scription		
			1
Item Filter	Find	Disc. % Charge	
Item	anta's Workshop	Description Display         Flag?         Photo?         Size         Color         Rate         Tax?         Rate Calc         Quantity         Revenue Type         Sort <ul> <li>Short</li> <li>Long</li> <li>96 x 132 x</li> <li>775.00</li> <li>X</li> <li>775.00</li> <li>X</li> <li>\$775.00</li> <li>X</li> </ul>	
2		Rental Sort	
			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
		7	
Notes			
140/65		Created by: Elizabeth Fleming 12/21/19 Modified by: Elizabeth Fleming Discount % Tax \$41.08	
		12/21/19 Tax \$41.08 Modified by: Elizabeth Fleming Discount % Tax \$41.08	
		Grand Total \$816.08	
0		Done Photo Proposal Test	Photo Proposal PDF
$\sim$			

# You can see the conflicts with another job.

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

Section Detail ile Edit View Insert Format Reco	ds Scripts Window Help				- 0 ×
SECTION 12741.2.A - CUR	RENT DEFINITIVE VERSION			ections for Job # 12741	
Job #         Job Name           12741         New Even           • Section #         • Rev. Section Header	Client Name Goatopia			#     Name       \$ 1.A     At Ampa we name the       \$ 2.A     Stage Set	Total \$157.95 \$816.08
2 A Stage Set					
Item Filter Fin	Description Display Flag? Photo? Size Color     Image: Short O Long O 96 x 132 x	Disc. % Rate Tax? Rate Caic Quantity Revenue Ty 775.00 X 775.00 1 Rental	Charge		
Blue text indicates po with these jobs: 12703 12703 12703 12703	ential scheduling conflict			Total finitive Revision for Section #2, <i>Stage Set</i> A	\$974.03
				ection Sort Order for Job # 12741	Printout Sort Order
				<ul> <li>1.A At Ampa we name the</li> <li>2.A Stage Set</li> </ul>	
Notes	Modified by: Eli	zabeth Fleming Total 2/21/19 Discount % Tax Discount % Discount Grand Total	\$775.00 \$41.08 \$816.08		T
	Done	Photo Prop	posal Test Pho	oto Proposal PDF	

#### Go back to your Job Window.

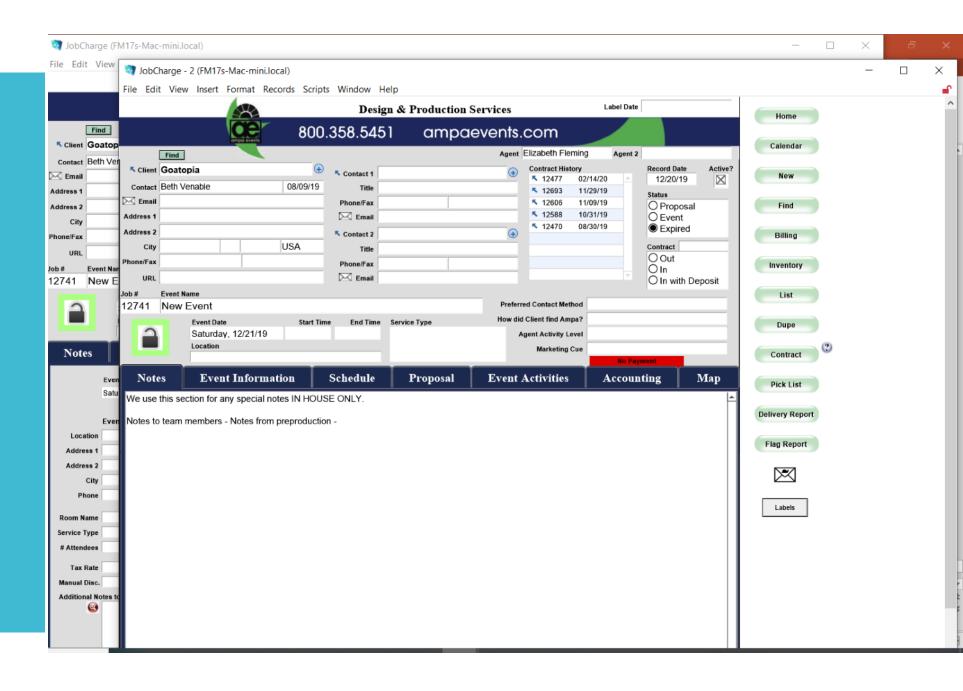
Click on the Window Tab for a drop down menu.

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		
		New Window	Label Date	
		Show Window		Home
	800.	Hide Window	.com	Colorday
F	Find	Minimize Window	Elizabeth Fleming Agent 2	Calendar
K Client G	Goatopia 🕣	Tile Horizontally Shift+F4	Contract History Record Date Active?	New
Contact Be	Beth Venable 08/09/19	Tile <u>V</u> ertically	S 12477 02/14/20      S 12/20/19     S 12/	
🗹 Email		Cascade Windows Shift+F5	Status           12606         11/09/19           O Proposal	Find
ddress 1		Bring All to Front	12588 10/31/19 O Event	
ddress 2		✓ <u>1</u> JobCharge (FM17s-Mac-mini.local)	- 12470 08/30/19 © Expired	Billing
City	USA	2 Section Detail	Contract	
hone/Fax		Phone/Fax		Inventory
URL		🖂 Email	O In with Deposit	
	Vent Name	Pref	ferred Contact Method	List
2741 N	New Event Event Date Start Time		did Client find Ampa?	
2	Saturday, 12/21/19		Agent Activity Level	Dupe
	Location		Marketing Cue	Contract (2)
	-		No Payment	Contract
Notes	Event Information	Schedule Proposal Even	t Activities Accounting Map	Pick List
	Surd Bata		<b>B</b>	
	Event Date Start Time Start Time	End Time Proposal Sections	Proposal History	Delivery Report
			us Version Version	
	Event Location Same as Client	Preview Photo Spelling	Reset	Flag Report
Locatio	on	# Name     I.A At Ampa we name the	Total \$157.95	
Address	s 1	S 2.A Stage Set	\$816.08	
Address	3 2			
Cit	ity			Labels
Phon	ne			
Room Nam	ne			
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	pe			
# Attendee				
# Attendee Tax Rat	es			
	es 5.30%			
Tax Rat Manual Dise Additional I	es 5.30% sc. Notes to be printed at end of Proposal/Contract:			
Tax Rat Manual Dise	es 5.30% sc. Notes to be printed at end of Proposal/Contract:	Total	5974 03	
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)													_		×	
File Edit	View	🤕 JobChai	rge - 2 (FM17	/s-Mac-mini	local)													_	×
	_	File Edit	View Insert	Format F	Requests	Scripts	Window	v Help	р										e e
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l I	Find			œ	<u>م</u>	200 2	358.54	151	an	onde	vents.	com				Home			
Client	_			ampa events	, 	,00.c	500.04	+01	un	ipue						Calendar			
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City Phone/Fax	-	Address 2					Contact 2				•			OExpired		Billing			
URL	-	City		Q Q	Q			<b>,</b> Q						Contract Q					
	Event Nar	Phone/Fax		Q			Phone/Fax			Q				O Out O In		Inventory			
12741	New E						🖂 Emai	۹ ۹					<b>v</b>	O In with De	posit				
2		Job # Ev 12703 <sup>Q</sup>	ent Name								Preferr	ed Contact Method	Q			List			
		12100	Event Da	ite	S	tart Time	End Tir	me Se	ervice Type		How did	Client find Ampa?	Q			Dupe			
			Q		Q		Q	Q			A	gent Activity Level				Dube			
Note	s		Location					-				Marketing Cue	Q,			Contract	3		
	_	Notes	Fvo	nt Inforn	action		chedul		Propos	e a l	Evont	Activities	Accoun	ting	Мар				
	Even Satu	notes	Lve			<u> </u>	Scheuun	<u>۳</u>	Торо	541	Event	Activities	Accoun		мар	Pick List			
		ų.													Ê	Dellerer Dee			
	Ever															Delivery Rep	ort		
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	<b>2</b>																		

🤯 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

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	
	Ce		CE	800.3	358.54	51 ampaev	vents.	com				Home	1
	Find		Find					Leslie Amason	Agent 2			Calendar	
🔨 Client	Goatopia		Strauss Marketing PR	•	S Contact 1	lav Edoria		Contract History	Agon L	Record Date	Active?		
	Beth Venable		Joy Edaria	12/13/19		PR Agent for Client	•		21/19	12/02/19	$\boxtimes$	New	
Email			joyedaria@gmail.com	12/10/10	Phone/Fax	PR Agent for Olient	_	<b>×</b> 12703 12/	21/19	Status			
Address 1			5757 W lovers Ln #215			joyedaria@gmail.com	_			<ul> <li>Proposal</li> <li>Event</li> </ul>		Find	1
Address 2		Address 2		_	S Contact 2	,,	•			O Expired		Billing	
City		City [	Dallas TX 75209	USA	Title					Contract 1	2/10/19	Dining	1
Phone/Fax		Phone/Fax 2	214-352-6700		Phone/Fax					OOut		Inventory	1
URL		URL			🖂 Email	,	_		<b>V</b>	O In In with D	eposit		<u></u>
lob #	Event Name	Job# E	Event Name									List	
12741	New Event	12703	Santa Photo Op				Preferre	ed Contact Method					,
	Event Date		Event Date	Start Time				Client find Ampa?				Dupe	
Ľ	Saturday, 12/21/19 Location		Saturday, 12/21/19 Location N. Bethesda Market Plaz	3:00 PM a, Bethesda, MD	6:00 PM	Rental w/ Install & Tal Down	ke A	gent Activity Level Marketing Cue	Paid in	Full		Contract	C
Not	es Event Informati	Notes	s Event Informa	tion s	Schedule	Proposal	Event 4	Activities	Accoun	ting	Map	Pick List	
	Event Date Saturday, 12/21/19		must be sturdy enough and h green carpet, sides, lights,		-				•		<u></u>	Delivery Report	
Loca	Event Location Same as Clien		er Green Spandex for 6ft rect or a 6ft rectangle) coming fro			poly linen for 4ft rectangle	(will need	to be tucked und	ler since the	only size for a	4ft	Flag Report	
Addre	ess 1	Please ta	ake snow batting for trees	and Santa's w	vorkshop. 1	Fed wants all old batting	plus som	e new to be take	en.			$\bowtie$	
Addre	City hone	Proposal	ll 1st pass 12.13.19 all item	s a go								Labels	
Room N	lame												
Service	Туре												
# Atten	dees												
Manual	Rate 5.30% Disc nal Notes to be printed at end of Propos	4											

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		
12741	New Event		Goato	pia				1.A At Ampa we name the	\$157.95		
Section #	Rev. Section Header							Stage Set	\$829.24		
2	A Stage Set										
😔 Narrative De	escription										
							<u> </u>				
							<b>*</b>				
Item Filter	Find										
~	Find	Description Display	Field Director	Color Data Taria	Data 0-1- 0	Disc. %	Charge				
	Santa's Workshop	Description Display     Short O Long	Flag? Photo? Size	Color Rate Tax? 775.00			Sort \$775.00				
(-)		© onon () cong		110.00	110.00	Rental	Sort				
🤸 🔨 Lightin	ng: Gobo, Standard Steel Retail	Short O Long		12.50	12.50		\$12.50				
- <u>@</u>						Rental	Sort		v		
								Total	\$987.19		
								Definitive Revision for Section #2, Stage Set			
								A			
								Continue Control Control for Lab # 42744			
								Section Sort Order for Job # 12741			
								1.A At Ampa we name the	Printout Sort Order		
								S 1.A At Allipa we halle the			
							-				
lotes						Total	\$787.50				
				ted by: Elizabeth Fleming 12/21/19		Тах	\$41.74	-			
			Mod	fied by: Elizabeth Fleming 12/21/19		Discount					
						and Total	\$829.24				
			<b>*</b>		G	and iotai	\$829.24		)		
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			Done			Photo Propo	sallest	Photo Proposal PDF		$\sim$	
9 🖷	)										
9 🖷		al Notes to be printed at end of Propo	sal/Contract:								
)		al Notes to be printed at end of Propo	sal/Contract:								
0			sal/Contract:		Total Deposit Required	\$987.19					

#### To Remove an item from a proposal use Shift+Click

Section Detail e Edit View Insert Format Records Scrij	ipts Window Help	×
SECTION 12741.2.A - CURRENT I	DEFINITIVE VERSION	# 12741
Job # Job Name	Client Name	
12741 New Event	Goatopia 5 1.A At An 5 2.A Stage	npa we name the \$157.95 _ e Set \$829.24
⊕ Section # ⊕ Rev. Section Header		φ023.24
2 A Stage Set		
S Narrative Description		
Item Filter Find	Disc. % Charge	
( Item	Description Display Flag? Photo? Size Color Rate Tax? Rate Calc Quantity Revenue Type Sort	
⁺∕ 👗 Lighting: Gobo, Standard Steel Retail		
Set Santa's Workshop		
★ Set: Santa's Workshop	Rental Sort	v
Click to duplicate item. Shift-click to delete item.		Total \$987.19
		er for Job # 12741
		Printout Sort Order
		npa we name the
	<sup>™</sup> 2.A Stage	Set
Notes	Total \$787.50	
	Created by: Europetin Preming	
	Modified by: Elizabeth Fleming Discount % Tax \$41.74 12/21/19 Discount	
	Discola	
	▼         Grand Total         \$829.24	× .
😑 📵	Done Photo Proposal Test Photo Proposal T	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.

Control       Contro       Control       Control	ECTION 12741.2.A - CURREI	T DEFINITIVE VERSION	s for Job # 12741
Section 1 @ Rev Section Header A Stage Set Narretve Dascription Displays Flag? Photory Site Calve Rate Tax? Plat Calc Ountry Reverse Type State buphong Coles, Standard Steel Retail @ Biori Leang @ 9 x 132 x 775:00 X 775:00 1 Reverse Type State Bet Sanda's Weakhing @ Biori Leang @ 9 x 132 x 775:00 X 775:00 1 Reverse Type State Bet Sanda's Weakhing @ Biori Leang @ 9 x 132 x 775:00 X 775:00 1 Reverse Type State Permanently delete this line item? Reverse Type State Reverse Type State Calve I and the state Reverse Type State Bet Sanda's Weakhing @ Biori Leang @ 9 x 132 x 775:00 X 775:00 1 Reverse Type State Permanently delete this line item? Reverse Type State Reverse Type State Reverse Type State Section State Calve # 212 State Revision for State # 22.000 Rev Section State Calve # 212 State Revision for State # 200 Reverse Type State Section State Calve # 212 State Revision for State # 200 Reverse Type State State Revision for State # 200 Reverse Type State Section State Calve # 212 State Revision for State # 200 Reverse Type State State Revisio			
Sector       First Status Status         m       Filter       Descretion Display Flag? Photor 5 Size Color Rate Tax? Ratio Calc Quantity Forceal 5 725.00         Number Descretion Display Flag? Photor 5 Size Color Rate Tax? Ratio Calc Quantity Forceal 5 725.00       Torceal 5 725.00         Det Savia's Workshop       Permanently delete this line item?       Total 5 787.50         Permanently delete this line item?       Sector 5 767.50         Variantity Calcol of the state of t			
haranter bereinste Im Riter			010g0 001 0020.24
Im Filter     Immodel in the			
m Filer Description Display Flag? Pholo? Size Celer Fax? Rate Calc Quantity Revenue Type Sort Luphing Good, Standard Steel Retail @ Short Long @ 96 x 132 x1 775.00 @ 775.00 1 Revenue Type Sort Size: Santa's Workshoo @ 96 x 132 x1 775.00 @ 775.00 1 Revenue Type Sort Warning Permanently delete this line item? Cancel OK 1 1. Al Ampa we name the 2 A Stage Set Protest Sort Order for Job # 12741 Protest Sort Order 2 A Stage Set 1 2. Alsape Set 1 3 Alsape Set	Narrative Description		
m Filer Find Decription Display Fieg? Photo? Size Color Rate Tax? Rate Calc Quanty Revenue Type Sort Uphong Gebe, Standard Steel Retail @ Short O Long ] ] 90 x 132 x 775 00 ] 775 00			
Imm       Description Display Flag? Photo?       See       Color       Description Display       Flag       See       See       Color		<b>T</b>	
Langar Gobo, Standard Steel Retai     Short ○ Long ○ □ 12.50 ▼ 12.50 1 0.01 1 0.01 0.00 0.0000 0.000 0.000 0.000 0.000 0.000 0.0000 0.000 0.000 0.0000 0.		Disc. % Charge	
Image: Section date relation       Image: Section date relation       Image: Section date relation date re			\$15
Set: Santa's Workshop     Warning     Warning     Permanently delete this line item?     Cancel     OK     * 1A	Lighting: Gobo, Standard Steel Retail		\$15
Warning   Permanently delete this line item?     Cancel     OK     Section Sort Order for Job # 12741     Printout Sort Order     Y 1A     At Ampa we name the     102/113     Discount %   Total   \$787.50   Total   \$787.50   Total   \$787.50   Total   \$787.50   Discount %   Total   \$787.50   Total   To			
Verifing Permanently delete this line item? Cancel OK s Total \$787.50 Nodiced by: Etzabeth Florning 1221/13 Flor	6	Rental Sort	· · · · · · · · · · · · · · · · · · ·
Permanently delete this line item? Permanently delete this line item? Cancel OK Section Soft Order for Job # 12741 Permost Soft Order * 1.4. At Ampa we name the * 2.4. Stage Set * 1.4. At Ampa we name the * 2.4. Stage Set Model by: Elizabeth Fleming 122/119 Discount % Staf.50 Discount % Staf.20 Discount % Staf.2		Warning	Total \$987.19
Permanently delete this line item?			Revision for Section #2, Stege Set
Printeut Sort Order			
Printeut Sort Order		Postion	Sort Order for Job # 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 Revise the section.

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### Section Revisions

We no longer want the Club Chairs initially chosen.

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### Now the Section is I.B instead of I.A

Time to search for new chairs

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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					<b>(+)</b> #	Name	
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### On to Installation Fees

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12741 New Event Goatopia		1.B At Ampa we name the \$157.95	
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3 A Labor and Delivery		S.A Labor and Delivery \$0.00	
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		Section Sort Order for Job # 12741	
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#### 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.

<ul> <li>JobCharge (FM17s-Mac-mini.local)</li> <li>File Edit View Insert Format Records Scripts Window Help</li> </ul>					×
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
Venue: Hotel Hotel NC 910-458-2030	@@ ^ Clear #		Ted Rubis		3
Venue: Hotel Internally NC - Charlotte 704-333-9000	## Move	+ Agent_2_Name	Ted Rubis		3
Venue: Hotel Internally NC - Charlotte 704-527-9650	Agent_1_#		Ted Rubis		
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	<ul> <li><u>D</u>escending order</li> </ul>		Ted Rubis		
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Venue: Hotel NC - Triangle 919-833-1120	Reorder based on summary f	eld Specify	Ted Rubis		
Venue: Hotel NC - Triangle 919-781-7000	Override field's language for		Ted Rubis		
Venue: Hotel NC - 336-725-3500			Ted Rubis		3
ii) (+) (-) Sort ) (P Standard -) (= Client List )	Keep records in sorted order	Unsort Sort Cancel			
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You can see that there are 299 Client accounts that are available for contact.

Now research and prioritize.

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Home	Main Legacy C	Calendar	Schedule	Admin	in (in	ventory Cli	ents Vendors						
Clients										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			$\bowtie$		
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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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	- ^ - -
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### 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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Address			Client Type	Client List	Region	Category	12/29/11 Phone Call			- 1
PO Box 3 City		Country	1		NC - East		12/20/11 Phone Call			- 1
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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* Eric	Kallestad	202 111 0100		03/01/2011	agareproperoctarig.	<u> </u>				
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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!!!