

# Application Manual

© 2005 Event Software

# FASTbook

## Event Management and Facility Scheduling

---

*by Keith Enlow*

*Welcome to FASTbook. FASTbook has been evolving for over 20 years and is used in small to large facilities world wide. In these pages you'll discover how FASTbook can ease your workday and organize your facility. You'll be able to access reports, and information about your facility faster, and easier than ever before.*

# FASTbook Help

## © 2005 Event Software

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: September 2005 in (Mesa, AZ)

### **Publisher**

*Event Software*

### **Managing Editor**

*Keith Enlow*

### **Technical Editors**

*Chris Meelhuysen*

*David Friedlander*

### **Cover Designer**

*Chris Meelhuysen*

### **Team Coordinator**

*Chris Meelhuysen*

### **Production**

*Manasi Tulpule*

### **Special thanks to:**

*All the people who contributed to this document including our customers who have made us aware what was relative and important to them. This manual was created with EC Software's program "HELP & MANUAL".*

# Table of Contents

Foreword	1
<b>Chapter 1 Introduction</b>	<b>3</b>
1 What is Fastbook .....	3
<b>Chapter 2 Installation</b>	<b>7</b>
1 Overview .....	7
2 Part I: Running the Setup Program from the CD .....	8
3 Part 2: Running WSSetup50.exe .....	28
4 Part 3: Verifying Installation .....	37
Conclusion .....	37
<b>Chapter 3 Getting Started</b>	<b>39</b>
1 How to read this manual .....	39
2 Selecting an Item in a Table or Field .....	40
3 Notepad .....	40
4 The Zoom Button .....	42
5 The Search Button .....	42
6 The Navigator Button in Setup .....	43
7 The Buttons in Event Detail .....	45
8 Selecting, Deleting, and Inserting Lines in a Table .....	45
9 The Menu Bar in Setup .....	46
Record Pull-Down Menu .....	47
View Pull-Down Menu .....	47
Windows Pull-Down Menu .....	48
Help Pull-Down Menu .....	48
The Next Record Key <F8> .....	48
The Previous Record Key <F7> .....	49
The Add/Insert Record Key <F5> .....	49
The Save Record Key <F2> .....	49
The Exit Record Key <Alt +F4> .....	49
The Combo Box .....	49
The Toolbar Setup .....	49
Fastbook's Toolbar .....	50
Check Boxes .....	51
Radio Buttons .....	51
The Bubble Help .....	51
Technical Support .....	51
The FASTbook Sign On Screen .....	52
Conclusion .....	53
<b>Chapter 4 Setting up FASTbook</b>	<b>55</b>
1 Setup .....	55

<b>2 Getting Started in setup .....</b>	<b>56</b>
<b>3 Facility Information .....</b>	<b>57</b>
<b>TAB 1: Center Profile .....</b>	<b>65</b>
Setting up the Center Profile .....	66
Notifications .....	66
Tickler Notification.....	67
Locations.....	67
<b>TAB 2: User Defined .....</b>	<b>67</b>
<b>TAB 3: User Defined 2 .....</b>	<b>68</b>
<b>Tab 4 Status/Booking .....</b>	<b>69</b>
Status .....	69
Booking Options.....	71
Event Number.....	71
Number of Minutes.....	71
Default Room, Default Start and End Times.....	71
Explode Group .....	71
And Divide Rate Equally.....	71
Calculate Show Times.....	72
Weekend Days.....	72
Tab 5 Internet Settings.....	72
<b>4 User Accounts and Security .....</b>	<b>73</b>
<b>TAB 1: Entering Users .....</b>	<b>81</b>
If setting up Single User.....	81
Not Active.....	82
Use Net Login Name.....	82
Coordinator.....	82
Sales Representative.....	83
User E-Mail Address.....	83
Changing User Password.....	83
<b>TAB 2: Security Levels .....</b>	<b>83</b>
<b>TAB 3: User Groups .....</b>	<b>86</b>
<b>5 Client Categories .....</b>	<b>87</b>
Entering Client Categories .....	88
<b>6 Clients .....</b>	<b>89</b>
Entering Clients Notes .....	91
Client Groups .....	91
<b>7 Event Types .....</b>	<b>92</b>
Entering Privileged Event Types .....	94
Entering Private Event Types .....	94
<b>8 Rooms .....</b>	<b>95</b>
<b>TAB 1: Rooms and Group of Rooms .....</b>	<b>105</b>
Entering Rooms.....	105
Entering Groups of Rooms.....	106
<b>TAB 3: Room Rates .....</b>	<b>109</b>
Entering Room Rates.....	110
<b>TAB 2: Room Styles .....</b>	<b>112</b>
Entering Room Styles.....	112
<b>9 Vendors .....</b>	<b>113</b>
Entering Vendors .....	115
<b>10 Equipment .....</b>	<b>116</b>
Entering Equipment .....	118

Entering Equipment Packages .....	120
<b>11 Meals</b> .....	<b>121</b>
Entering Meals .....	122
<b>12 Labor</b> .....	<b>124</b>
Entering Labor Rates .....	126
<b>13 Ticklers</b> .....	<b>127</b>
Entering Ticklers .....	129
<b>14 Outline Descriptions</b> .....	<b>131</b>
Entering Outline Discriptions .....	132
<b>15 Holidays</b> .....	<b>133</b>
Entering Holidays .....	136
<b>16 Ticket Types</b> .....	<b>139</b>
<b>17 Fastbook Online Security</b> .....	<b>140</b>
<b>Chapter 5 Main Interface</b> .....	<b>143</b>
1 Main Interface .....	143
2 Personal Preferences .....	144
<b>Chapter 6 Calendar</b> .....	<b>150</b>
1 Setting up and Using the Calendar .....	150
2 Calendar Filters .....	155
<b>Chapter 7 Event Detail</b> .....	<b>160</b>
1 Overview .....	160
2 Components of the Event Detail .....	160
Navigator Buttons .....	162
3 Scheduling an Event .....	163
4 Scheduling a Room for an Event .....	165
5 Scheduling Equipment for a room .....	168
Scheduling Equipment Packages for a room .....	169
6 Scheduling Meals for a room .....	172
7 Scheduling Labor for an Event .....	175
8 Entering Financial Information for an Event .....	177
9 Entering Information in User Definable Fields .....	179
10 Assigning ticklers to Events .....	180
11 Scheduling a Presenter for a Room .....	181
12 Attaching and sending Files .....	181
13 Entering Tickets Information .....	182
14 Entering Additional Event Information .....	183
15 Printing Event Information .....	184
16 Copy Entire Event to new date .....	185
17 Apply these values to the other room(s) .....	186

18 Make a Copy of Selected Room ..... 188

19 Delete multiple Room Bookings ..... 190

20 Event Outline ..... 192

21 Word Processor ..... 193

22 Entering Ticket Totals Information ..... 198

23 Closing Event Detail ..... 199

**Chapter 8 Invoicing 201**

1 Overview ..... 201

2 Invoicing Form ..... 201

**Invoices Tab** ..... 203

        Batch Invoice by Date Range..... 207

        Batch Invoice by Event Number Range..... 209

**Invoice Header Tab** ..... 211

**Invoice Details Tab** ..... 217

        Adding and Removing Charges..... 219

**Preview Tab** ..... 223

        Emailing an Invoice..... 224

**Invoice Setup Tab** ..... 225

        Charges / Discounts / Taxes..... 226

        Payment Terms..... 230

        Invoice ..... 232

3 Event Detail Invoices Tab ..... 233

**Billing Totals** ..... 234

**Invoice Grid** ..... 235

4 Invoice Report ..... 237

5 How-to ..... 241

**Create an Invoice** ..... 241

        From Within Invoicing..... 242

        From Within Event Detail..... 242

**Finalize An Invoice** ..... 242

        From Within Event Detail..... 242

        From the Invoices Tab..... 242

        From the Invoice Header Tab..... 242

**Void an Invoice** ..... 242

        From Within Event Detail..... 243

        From the Invoices Tab..... 243

        From the Invoice Header Tab..... 243

**Recalculate an Invoice** ..... 243

        From Within Event Detail..... 243

        From the Invoice Details Tab..... 243

        From the Invoice Header Tab..... 243

**Print an Invoice** ..... 243

        From Event Detail..... 244

        From the Invoicing Form..... 244

        From the Preview Tab..... 244

**Save an Invoice to PDF** ..... 244

**Edit An Existing Invoice** ..... 244

        From Event Detail..... 244

        From the Invoicing Tab..... 244

Email an Invoice .....	244
Establish Default Charges .....	245
Defer Charges .....	245
Batch Invoice Creation .....	245
Print Multiple Invoices .....	245
Edit Charges On-The-Fly .....	245
<b>Chapter 9 FASTbooking</b>	<b>247</b>
1 Overview .....	247
2 Simple Booking .....	247
3 Advanced Booking .....	251
4 Setting up the Time/Duration section for an event .....	254
5 Time/Duration tab .....	255
Other Fields to search by .....	255
6 Creating a New Event .....	256
7 Weeks of Month Tab .....	258
8 Dates to Include & Exclude .....	258
<b>Chapter 10 Timelines</b>	<b>260</b>
1 Overview .....	260
2 Daily Timelines .....	260
3 Monthly Timelines for Rooms .....	262
4 Monthly Event Timeline .....	264
5 Room Event Monthly .....	266
6 Daily Timeline for Resources .....	267
7 Working With The Labor Timeline .....	272
<b>Chapter 11 Expired Items</b>	<b>276</b>
1 Overview .....	276
<b>Chapter 12 FASTbook Messaging</b>	<b>279</b>
1 Overview .....	279
<b>Chapter 13 Email</b>	<b>284</b>
1 Overview .....	284
2 Creating an E-mail Template .....	284
3 Opening an existing Template .....	286
<b>Chapter 14 Contact Management</b>	<b>289</b>
1 Overview .....	289
<b>Chapter 15 Reports</b>	<b>294</b>
1 Overview of Reports .....	294



---

2	Selecting a Report .....	295
3	Report Setup .....	296
	Report Orientation & Page Size .....	297
	Report Column Layout & Sort Order .....	298
	Report Column Filtering & Selection Criteria .....	299
	Report Preview .....	300
4	E-mailing a Report .....	301
<b>Chapter 16 Utilities</b>		<b>304</b>
<b>Chapter 17 Appendix B: Troubleshooting</b>		<b>308</b>
1	Overview .....	308
<b>Chapter 18 Support Options</b>		<b>311</b>
1	Customer Support .....	311
2	Virtual Network Computing .....	311
<b>Chapter 19 Improving FASTbook</b>		<b>313</b>
1	Input from our customers .....	313
<b>Chapter 20 Uninstall Fastbook</b>		<b>315</b>
1	Uninstall .....	315
2	Firebird ODBC .....	320
<b>Chapter 21 Final Thoughts</b>		<b>325</b>
1	No such thing as a perfect manual .....	325
	<b>Index</b>	<b>0</b>

## Foreword

FASTbook is not your ordinary scheduling program. It brings your organization together like no program I have ever seen before. Where as most software solutions bring confusion and hinderance to my daily function, FASTbook excels in ease of use. Since using FASTbook, many organizations have literally cut in half the time it takes them to do their daily functions and have been able to use that time to better their procedures and environment.

After you have integrated FASTbook into your facility as they have, you will begin to understand the real convenience of FASTbook. FASTbook \*IS\* the premiere events scheduling solution. Period. Easy to use, yet powerful. Have fun browsing the manual and learning about FASTbook's many features.

# FASTbook 5.5

# Chapter

# 1

Introduction

# 1 Introduction

## 1.1 What is Fastbook

### What is FASTbook?

FASTbook is one of the highest rated facility management programs available. The Calendar based user-friendly windows environment is simple to use and features extensive context-sensitive on-screen help menus, along with a convenient users guide. FASTbook is a complete, state-of-the-art booking system that is easily customized for your facility and your specific needs. FASTbook performs every function necessary to quickly schedule and track all aspects of an event, from initial inquiry to final invoicing.

The Calendar and Timelines are a graphical display of your facility's bookings and show you everything that is going on in your facility.

The calendar gives you an instant overview of your facility's status in easy-to-read monthly calendar form.

The Daily Timeline is a graphical display of your facility's bookings for one day. It gives you a snapshot of the status of all rooms.

The Monthly Timeline displays your facility's bookings for one month.

The user has access to notes from the calendar, with the ability to add unlimited notes.

The Booking Modules are powerful tools that make managing room availability and booking fast and simple. You can view the calendar to check room availability or choose one of FASTbook's three Intelligent Booking methods to select the best available room for you.

FASTbooking allows for quick capturing of all essential event information, and then finds the best available room according to your specifications.

FASTbooking allows you to find space, check attributes and book it while the customer is on the phone. It is so simple and quick that you can book the event in less than forty seconds.

Advanced Booking allows you to quickly and efficiently schedule repetitive or recurring events. By using Advanced Booking, you can schedule a dozen events as easily as one.

Event Data allows you to enter all relevant information on one screen.

Canceling or changing one of 8 event statuses simply requires that you enter the Event Data screen and change the status of the event. The program takes care of the rest.

The Resource Managers coordinate all aspects of facility equipment, meals and labor, including inventory, availability, resource allocation, and invoicing for both in-house and vendor supplied resources.

The equipment database manages all aspects of your equipment including inventory, availability and cost.

You can select meals from a list of meal components for in-house or vendor supplied

catering.

You can select the positions, enter the hours and FASTbook keeps track of labor from scheduling to billing.

When you need a detailed event outline for your event, it's just a matter of selecting to do items from your predefined list and typing in the time.

Unlimited ticklers, including Automated ticklers that set them self just incase you forget. If you need reminders to do a follow up for an event, you can select a tickler from your list of user-defined ticklers, and the system will automatically notify anyone assigned a tickler when they log into FASTbook.

FASTbook's Complete System performs every function necessary to quickly and easily schedule and track all aspects of an event, from adding notes to an event, handling correspondence and final invoicing.

With one click on your notepad button you will be able to write unlimited notes for the event or for rooms, equipment, meals or labor as well as ten user definable note tabs and if that is not enough, you can add notes to the client.

Client correspondence could not be easier. FASTbook allows you to setup Templates using MS Word for contracts and all correspondence. Just pull up a template, select the client you want from the menu, click on the merge button and you're done. You can save all correspondence and any files or any type to the event. Invoicing is as simple as clicking on a couple of buttons and printing a complete invoice with all resource charges.

When you need to check history for an event that took place 4 or 5 years ago, it's never been simpler. FASTbook not only saves the old events and has 24 user definable data base fields that you can name to create an in-depth financial history, such as "The Deal" as many arenas call it. It also covers things such as concession profits, advertising and revenue splits.

It generates comprehensive line item invoices and allows customized client billing for each event. Invoicing also tracks payments and adjusts totals automatically.

FASTbook supports an invoice module that automatically integrates all of the billing information from Event Detail. Because FASTbook tracks rooms, meals, equipment, labor and taxes as well as allows the end user to create 24 different user definable database fields, it's easy to create a multitude of financial reports. Besides the detailed invoicing, you have client history, aging, profitability, revenue, room and resource reports. FASTbook has over 2000 report combinations, you also can link the FASTbook tables to Excel or use our report builder to create it or we can create it for you in our reporting system.

FASTmail connects to your E-mail, any time you need to correspond with a client to confirm or make a change to their event or just send them a reminder. It's just a matter of selecting the FASTmail button, pick one of your correspondence templates that you previously created, add a note if needed and hit send.

Event Software is constantly improving FASTbook based on feedback from our customers. The new features that we add reflect the changing need and increasing complexity of facilities and their task of scheduling events.

The client database allows you to enter personal information about each client making a reservation or conducting business at your facility. You can set up automated ticklers or to-dos that can be attached to a specific event. The system notifies specific users when each task becomes due and when it was completed.

The Client Manager - Contact management program. While FASTbook manages the event, FASTbook's contact management program manages the Client from the clients first phone call to the end of the event or until the client has their next event. Keep track of clients or potential clients. Create a history; attach messages, important files, display calls, meetings and to-do items associated with every client in your system.

**FASTbook 5.5**

# **Chapter**



**2**

Installation

## 2 Installation

### 2.1 Overview

#### **What will I be Installing?**

The installation consist of three separate components as part of the overall installation. The first component which is the installation of Fastbook(the application) normally would be installed onto a network and will create within the Windows file structure directories for Fastbook.

The second component of the installation is for the Data Base Engine (Firebird). Firebird as well will create within the Windows file structure its own files, as well as additional sub-components one of which is the ODBC which allows for the communication between the data base and the Fastbook application.

The third component of the installation is for the work station. As with the previous two components, the work station installation will create within the Windows file structure its own files, as well as the ODBC. In addition, the work station installation will also create a Fastbook Shortcut Icon on the desktop.

#### **Some things to keep in mind before starting Fastbook Installation:**

- Need to have administrative rights to server and/or workstation
- Need to make sure that if using any Windows Firewall Software - may need to add exceptions for Fastbook/Firebird
- By default, Firebird uses Port 3050 across TCP/IP connection

#### **How do I install FASTbook?**

The following will instruct you how to install FASTBook 5.5 onto your network or local workstation.

#### **Before the Installation**

Before you can start the installation process, you should know if you are using other Borland Database Engine type products such as Corel WordPerfect Suite, and Goldmine on your system or Borland InterBase/Firebird SQL Engines. Once you obtain this information and you have about an hour for the installation, you are ready to begin. It may also be advantageous to call us at Event Software and set up a time when we can walk you through the installation.

#### **Steps to Follow for Installation**

The steps for installation are divided into three sections. First, run the installation program from the **FASTBook** 5.5 Installation CD. Second, once the installation program is complete, you will need to run workstation setup on each computer where **FASTBook** will be accessed. Third, you will start **FASTBook** and check to see that the installation was successful.

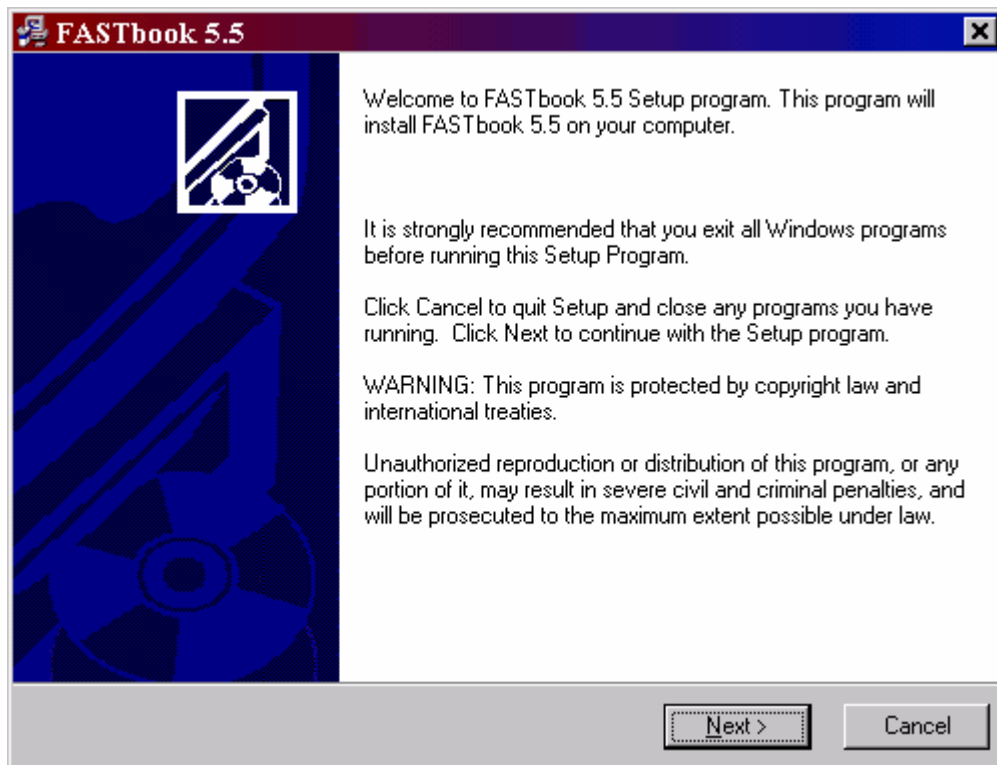


## 2.2 Part I: Running the Setup Program from the CD

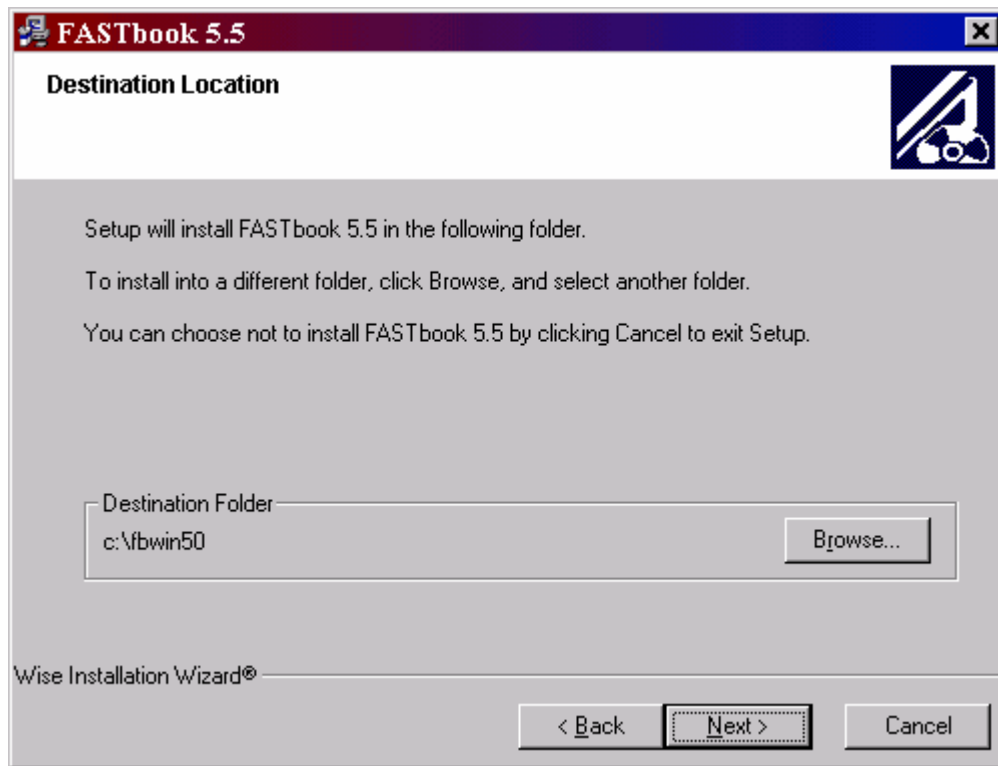
### Part I: Running the Setup Program from the CD

Insert the installation CD into your CD-ROM drive. The setup program on most computers will start automatically. If yours does not, go to START > RUN and type in X:\setup.exe, where X is the letter assigned to your CD drive.

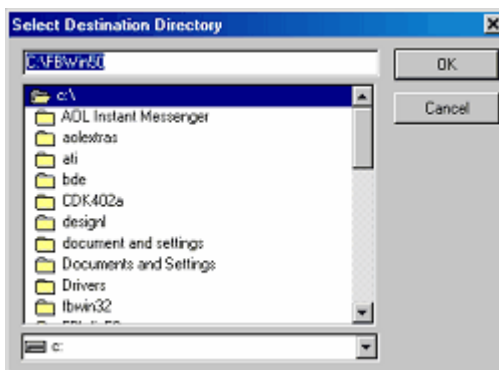
The Welcome screen for the installation program should display. Follow the instructions and then click "Next."



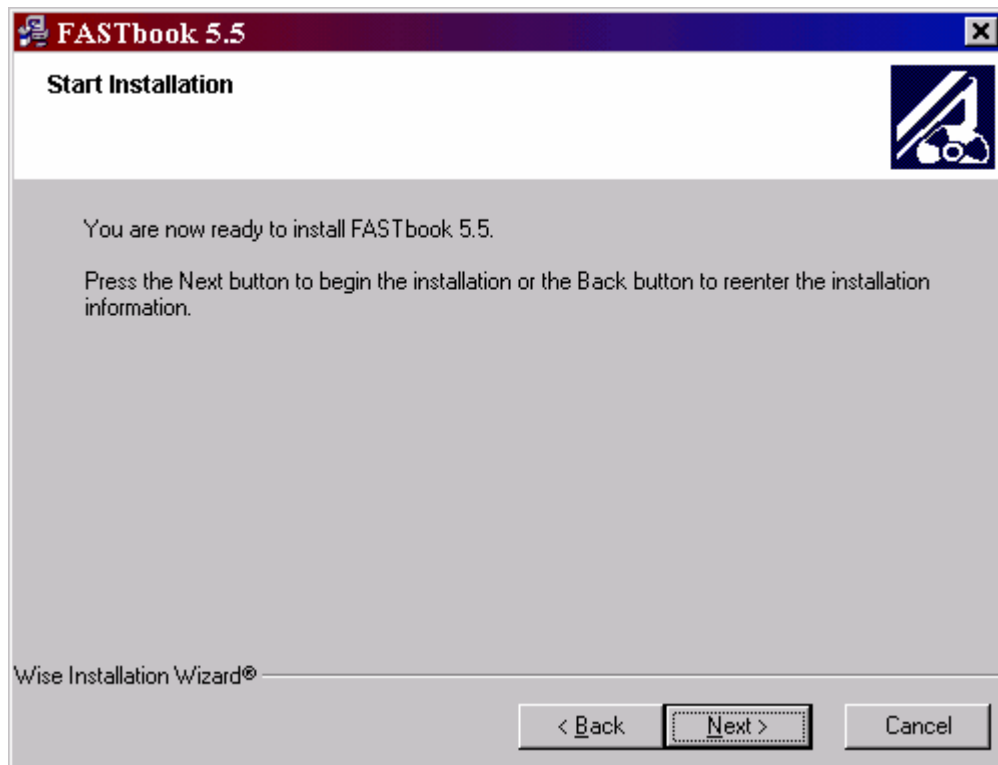
The next window will prompt you for the location you wish to install Fastbook 5.5. If this is a local installation, in most cases this will be your C:\ drive. If your Fastbook 5.5 will run off of a network, you will need to use your network drive letter such as F:\ or G:\ (e.g. G:\Apps\FBWIN50, or G:\FBWIN50).



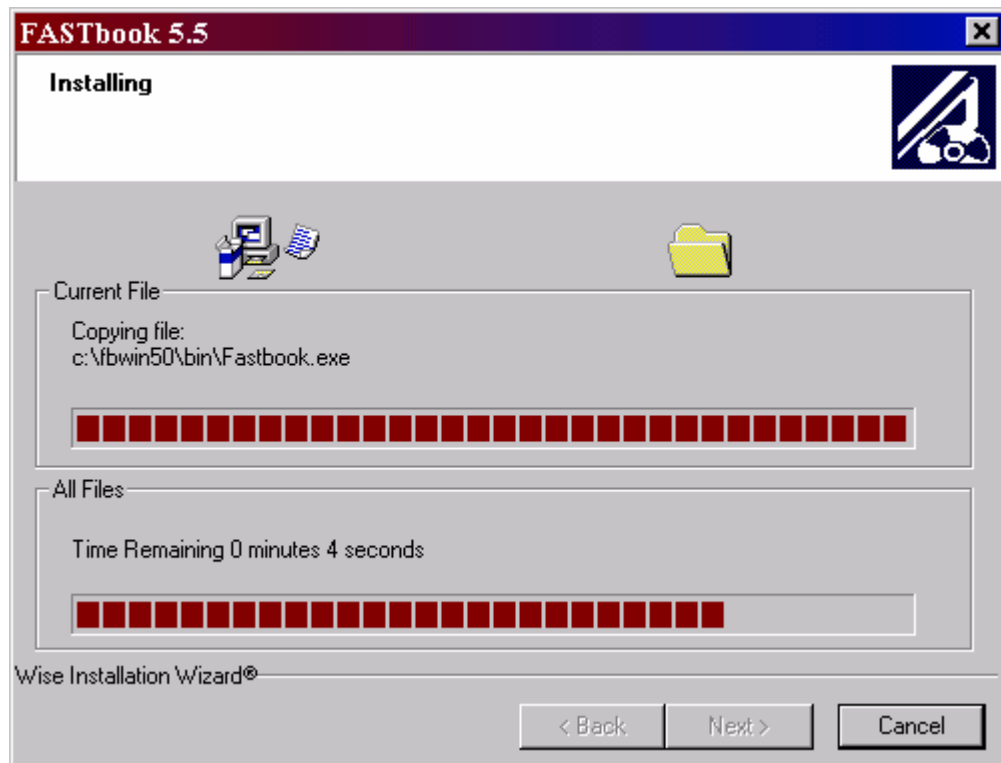
To change the destination folder click browse and go to the directory you wish to use. In this example, it would be G:\Apps. The program will automatically add the FBWIN50 for you.



It is very important that the destination folder is correct. If unsure, contact your system administrator for verification. When the destination folder is set correctly, click "Next."



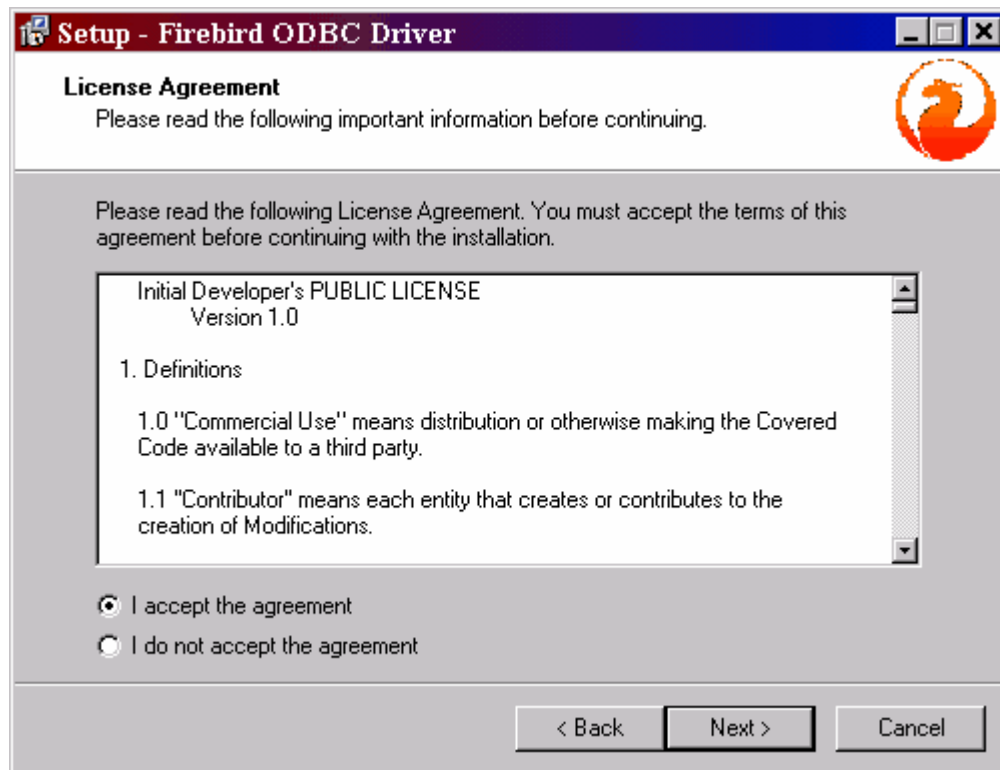
The setup program now has enough information to begin the installation. Click "Next" if you are ready to move on and begin the installation.



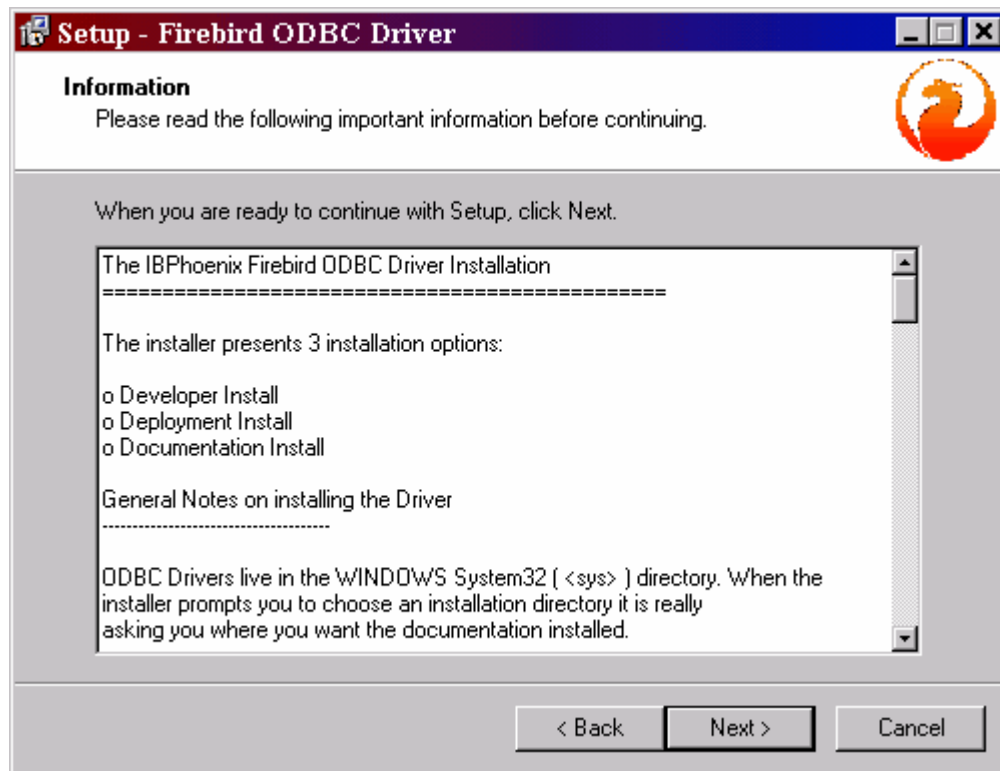
Files will begin to transfer to your destination computer and this window will appear. When the setup program gets to the point where it will install the Firebird ODBC Driver. You will see a prompt that looks like the following.



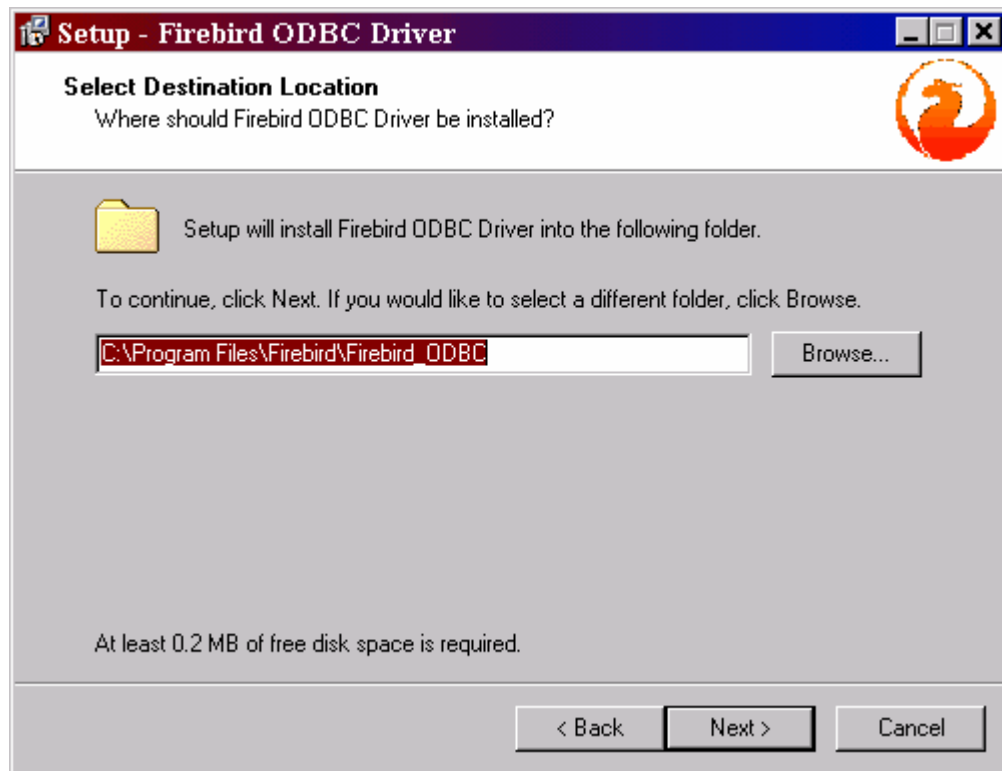
Click "Next". You will get an Electronic License Agreement read the agreement then - click on "I accept the agreement" and click "Next" to start Firebird ODBC Driver.



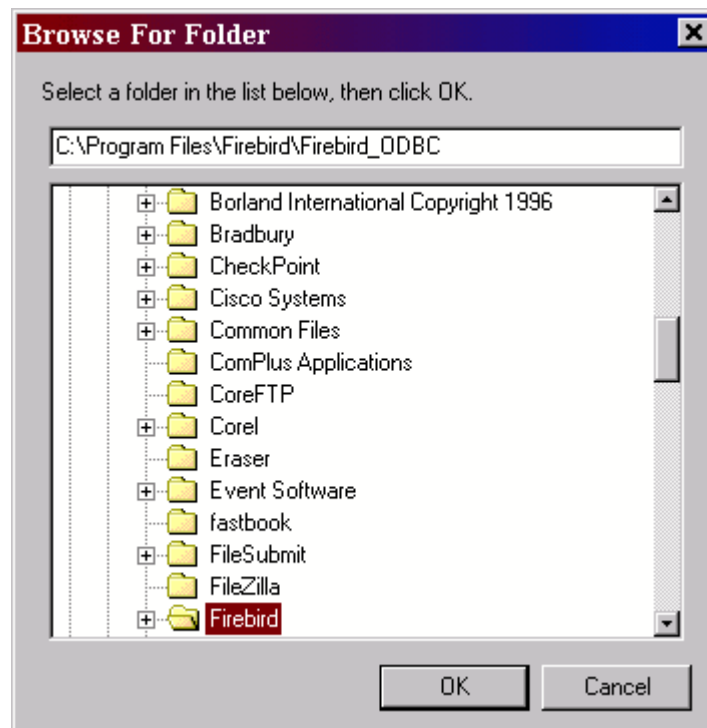
Click "Next" on "Information page" to continue with Firebird ODBC Installation.



The next window will prompt you for the location you wish to install Firebird. If this is a local installation, in most cases this will be your C:\ drive. If your Firebird will run off of a network, you will need to use your network drive letter such as F:\ or G:\ (e.g. G:\Apps\FBWIN50, or G:\FBWIN50).

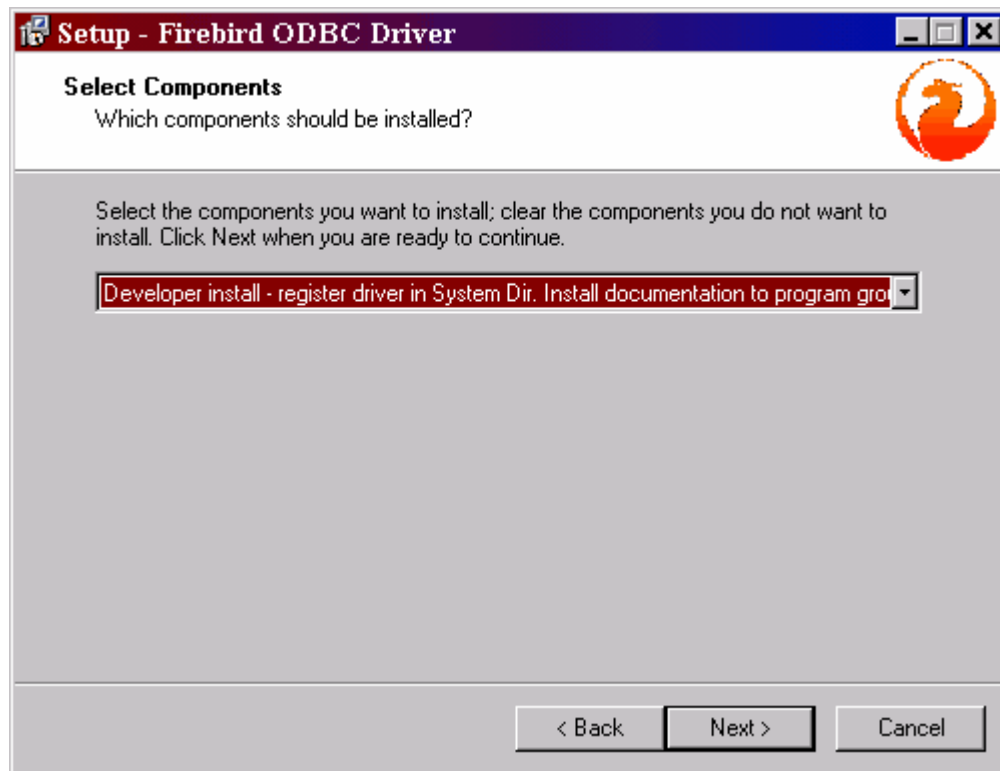


It is very important that the destination folder is correct. If unsure, contact your system administrator for verification. When the destination folder is set correctly, click "OK"

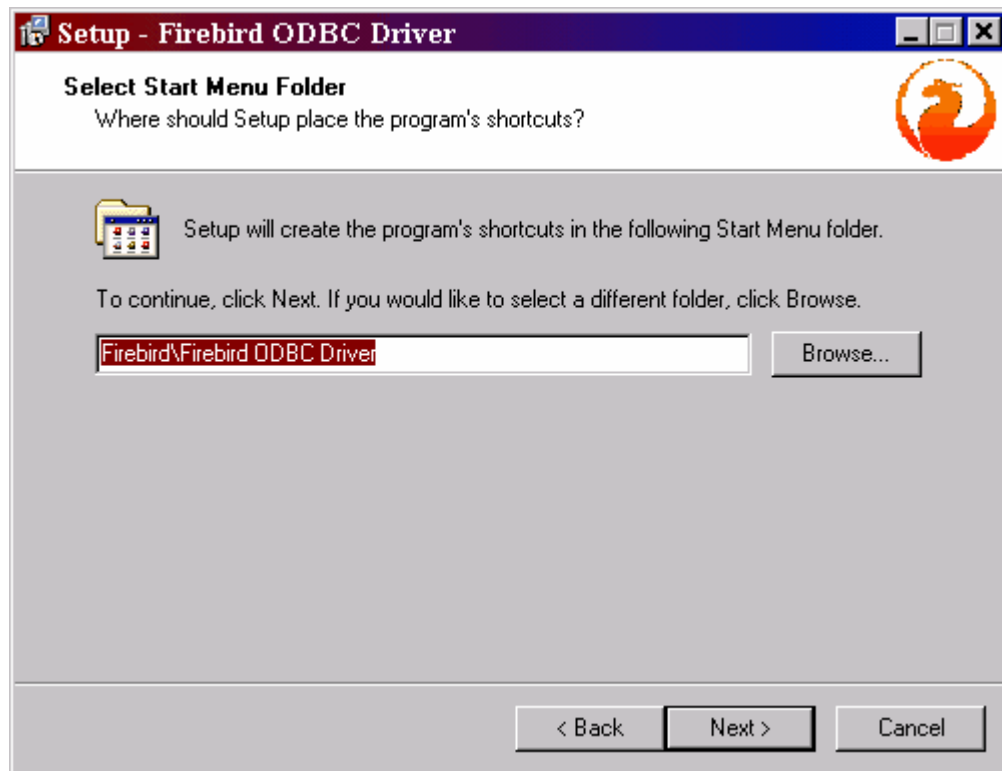




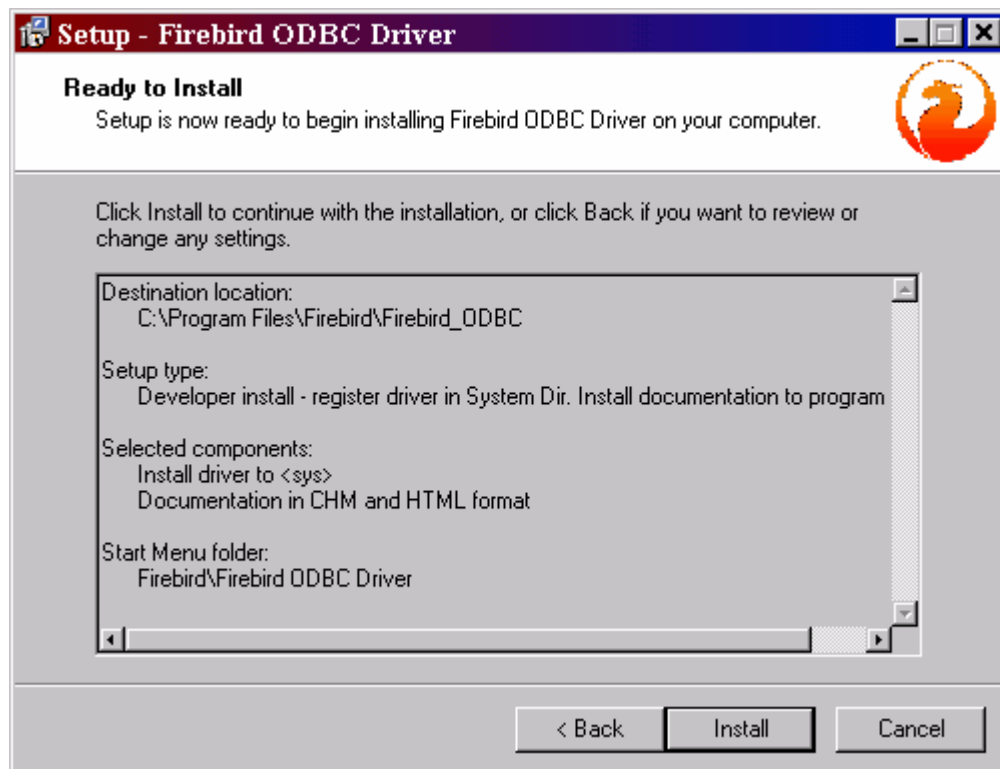
At the select Components screen - select the Developer install and click "Next" to continue.



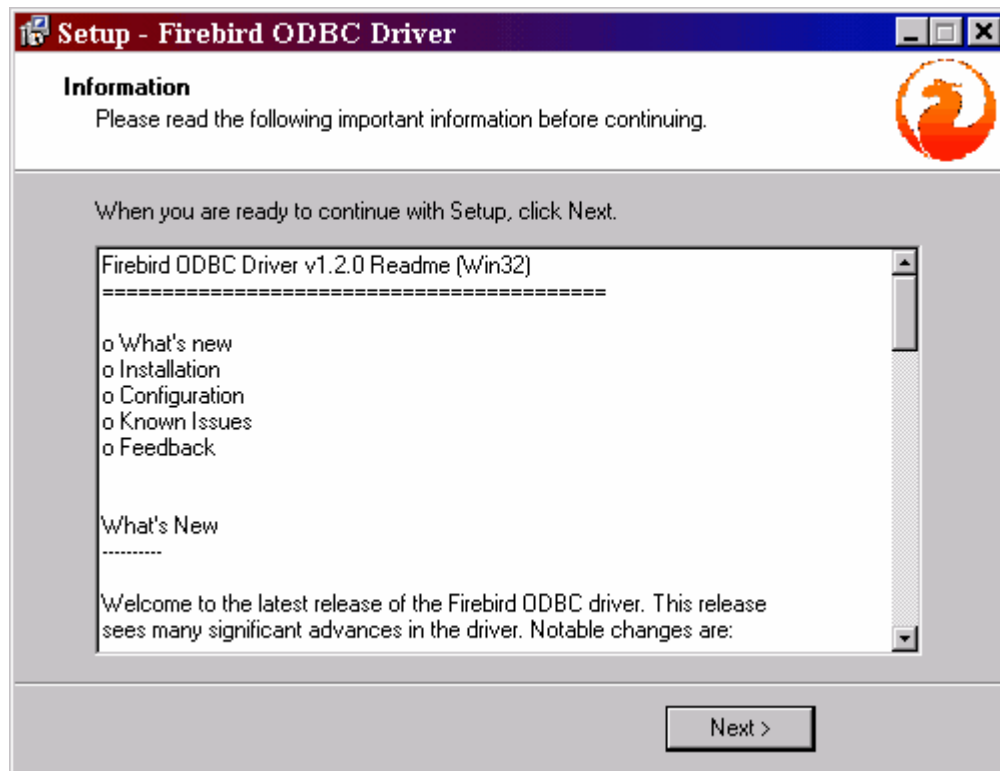
At the Select Start Menu Folder - stick with the default Firebird\Firebird ODBC Driver and click "Next" to continue.



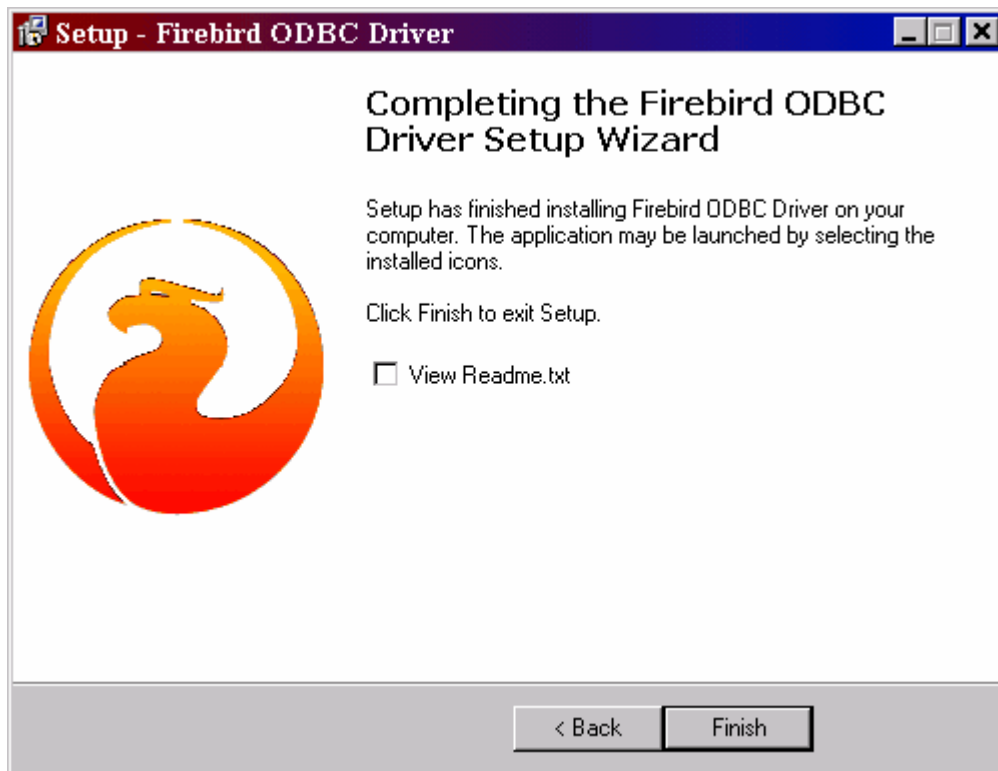
At the Ready to Install screen - click "Install" to continue.



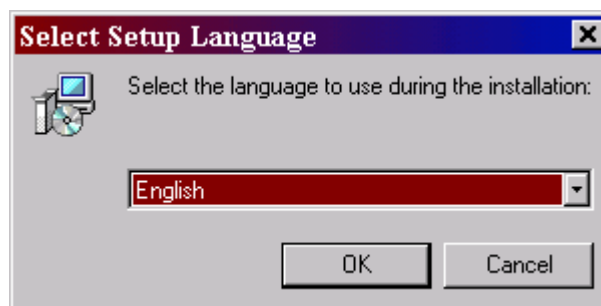
Click "Next" on "Information page" to continue with Firebird ODBC Installation



Click "Finish" to complete the setup of the Firebird ODBC Driver.



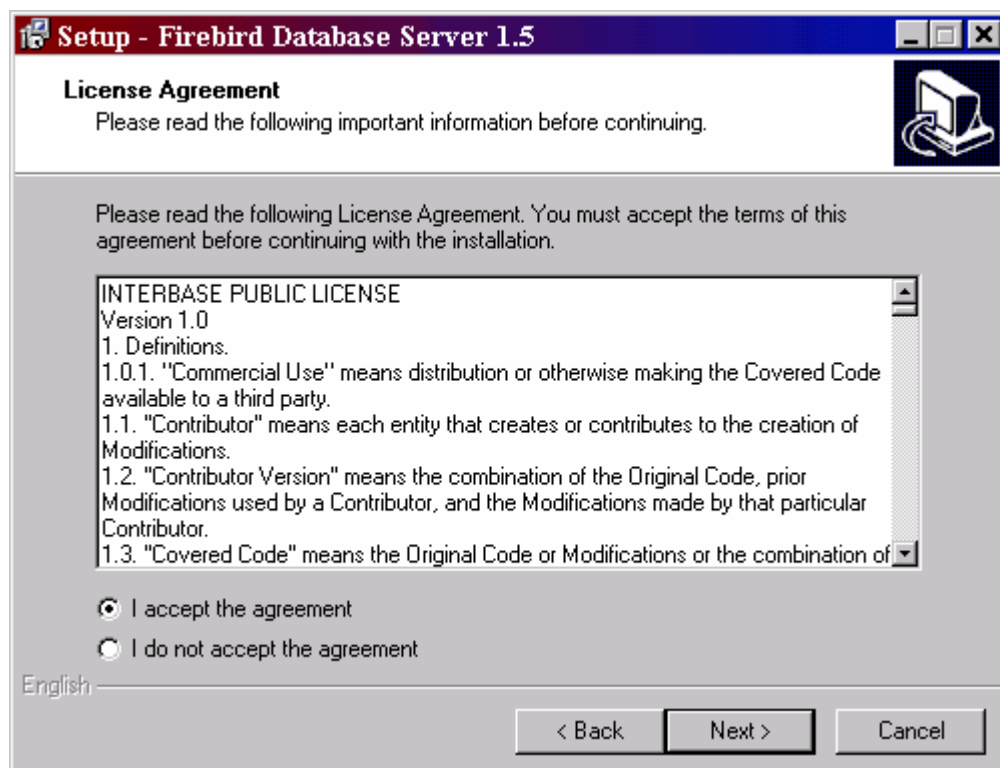
At the Select Setup Language screen - choose "English" and click "OK".



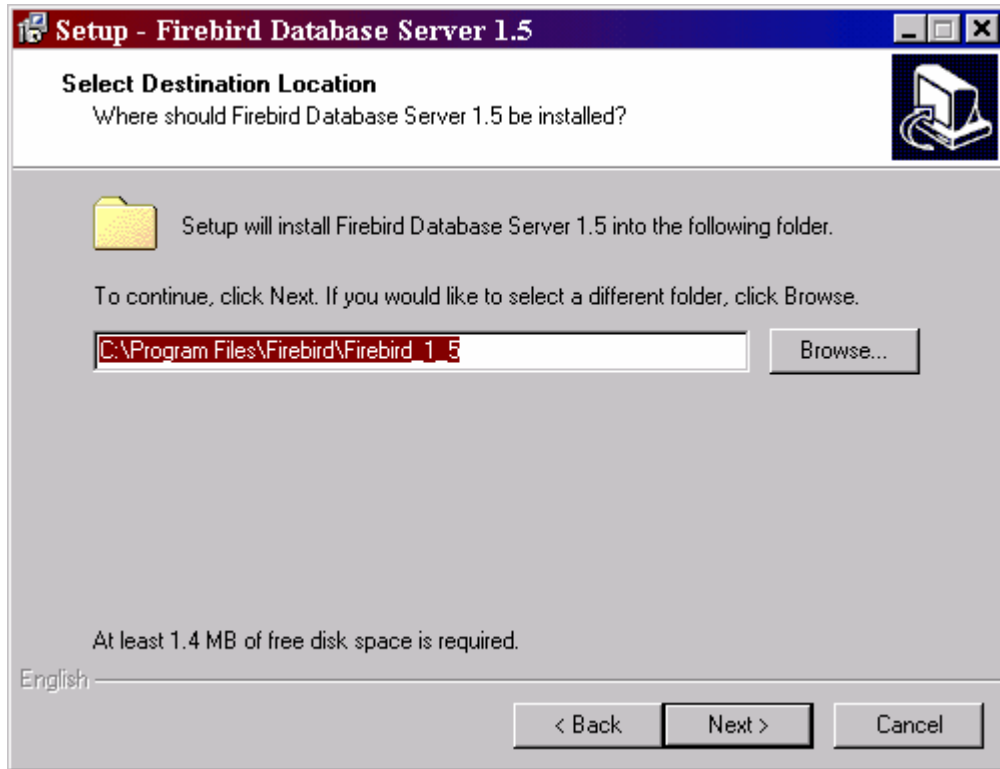
At the Setup Firebird database Server 1.5 click "Next" to start install.



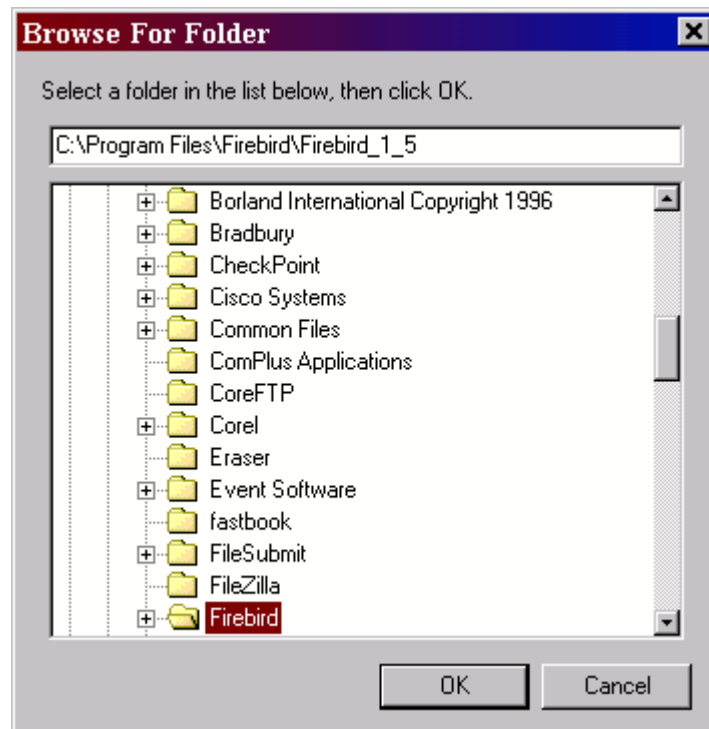
Click "Next". You will get an Electronic License Agreement read the agreement then - click on "I accept the agreement" and click Next to start Firebird Database Server 1.5.



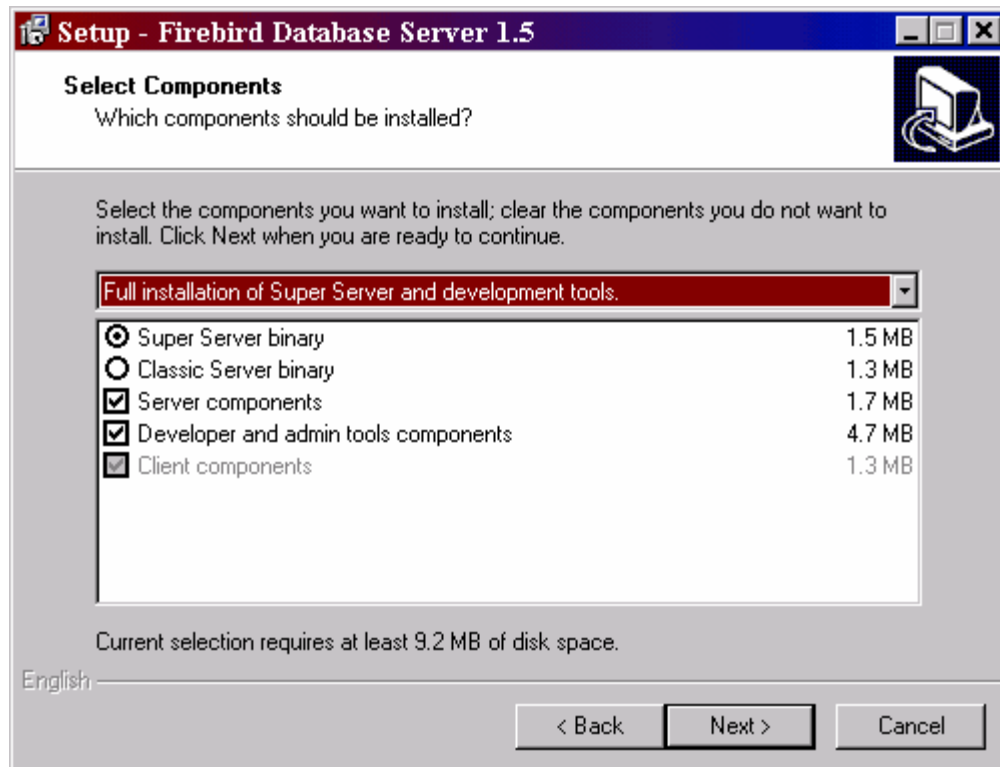
The next window will prompt you for the location you wish to install Firebird. If this is a local installation, in most cases this will be your C:\ drive. If your Firebird will run off of a network, you will need to use your network drive letter such as F:\ or G:\ (e.g. G:\Apps\FBWIN50, or G:\FBWIN50).



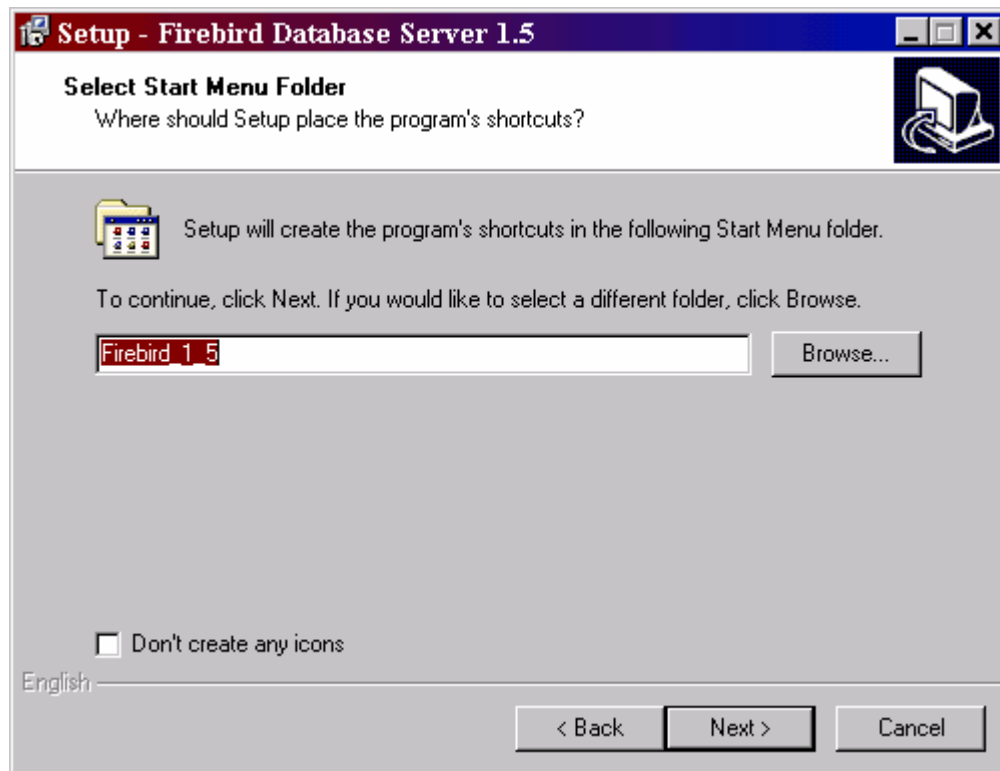
It is very important that the destination folder is correct. If unsure, contact your system administrator for verification. When the destination folder is set correctly, click "OK"



At the Select Components Window - choose Full installation of Super Server and development tools and click "Next".

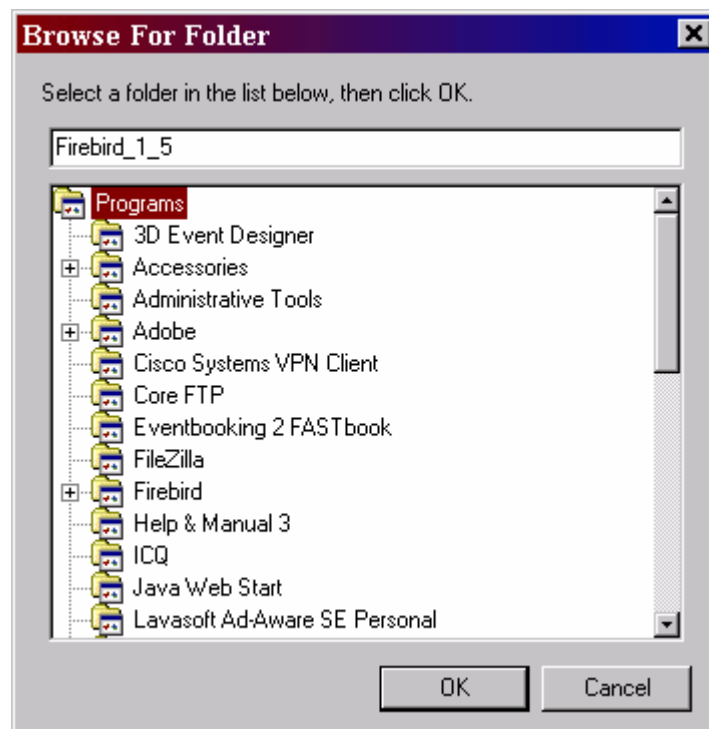


The next window will prompt you for the Start Menu Folder location - to continue click "Next"



If you want to select a different folder, click "Browse" Otherwise, if the folder is correct, click "OK"





At the Select Additional Tasks Window - choose the following five components:

Use the Guardian to control the Server

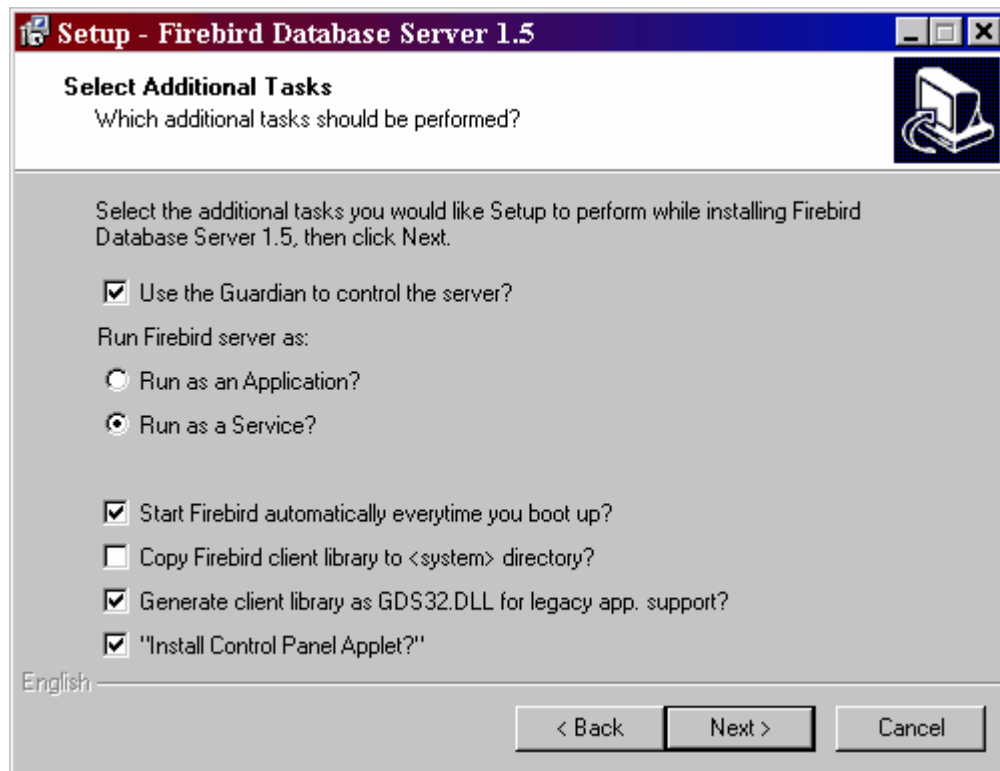
Run as a Service

Select Firebird automatically everytime you boot up

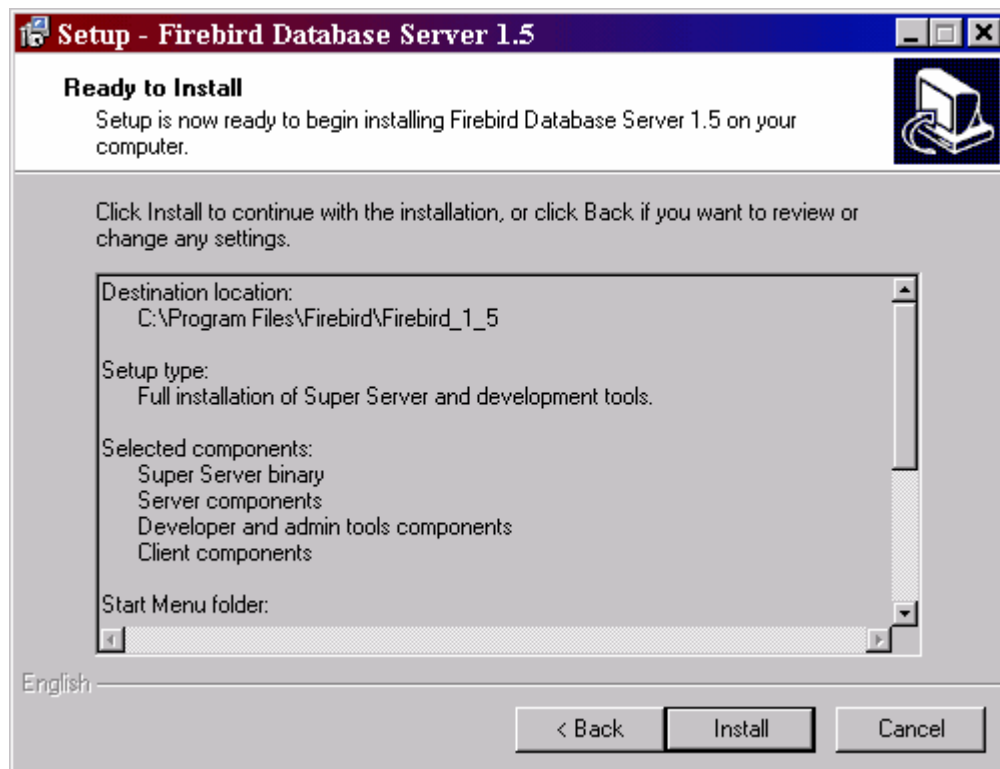
Generate client library as GDS32.DLL for legacy app. support

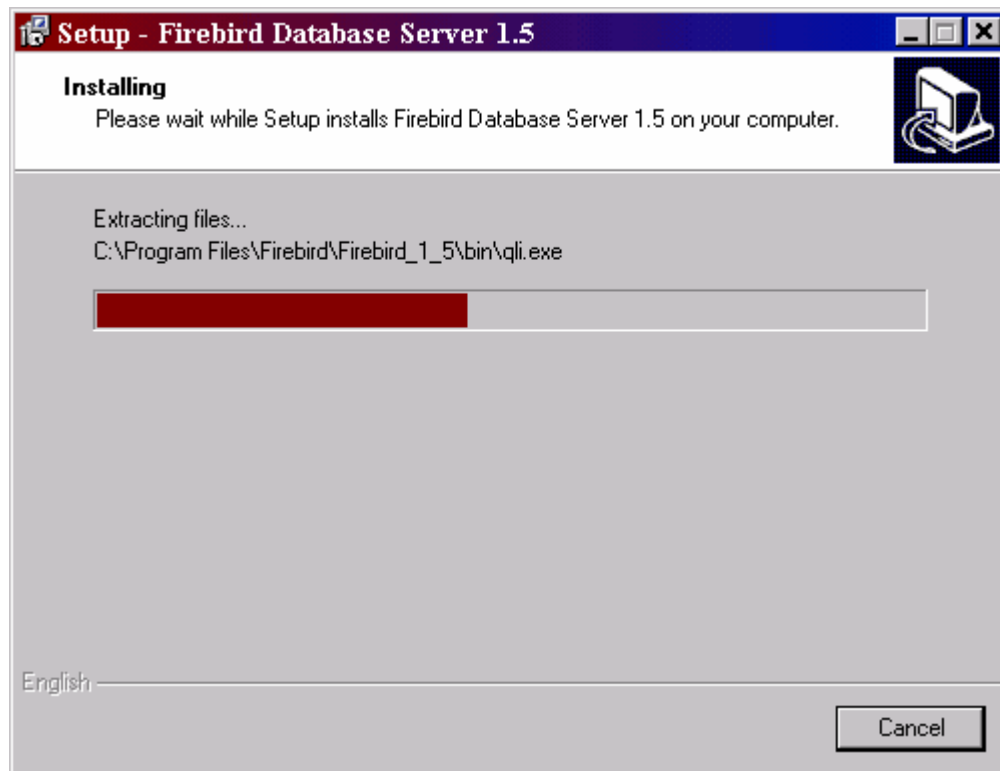
"Install Control Panel Applet"

Click "Next" to continue install

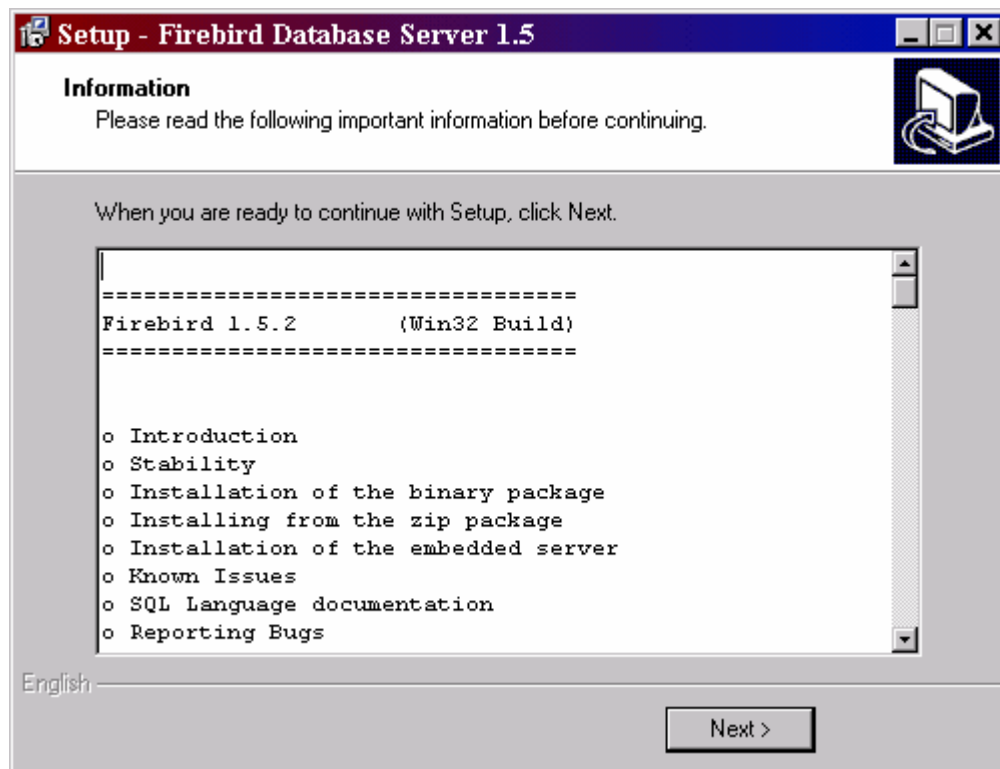


At the Ready to Install window - click "Install" to continue.

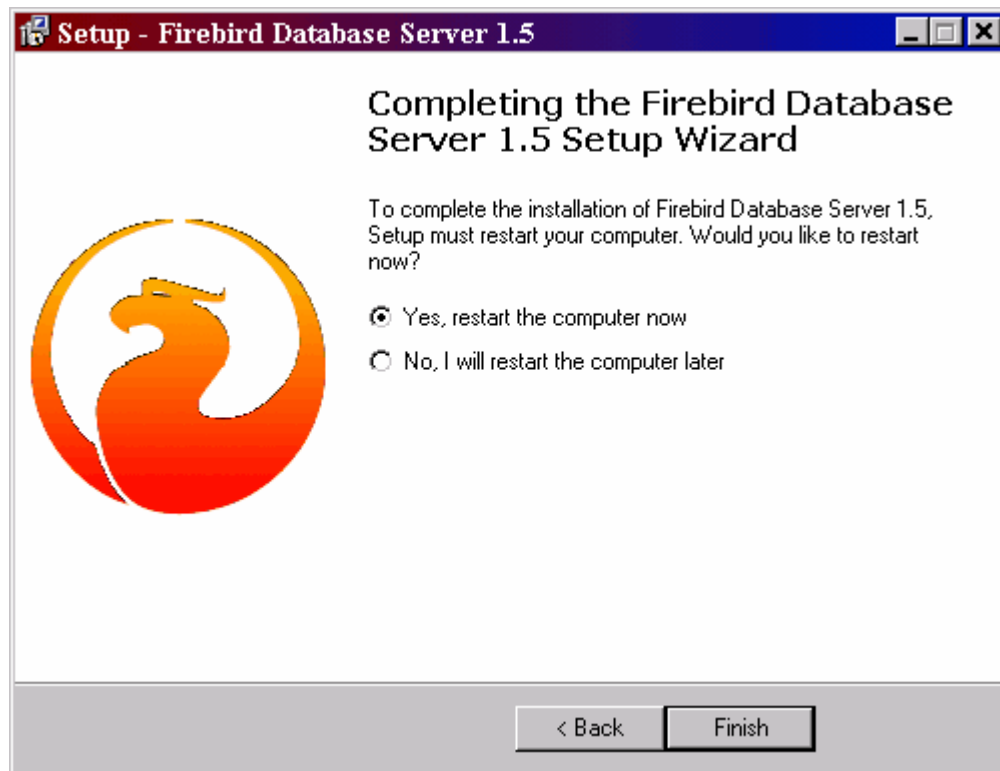


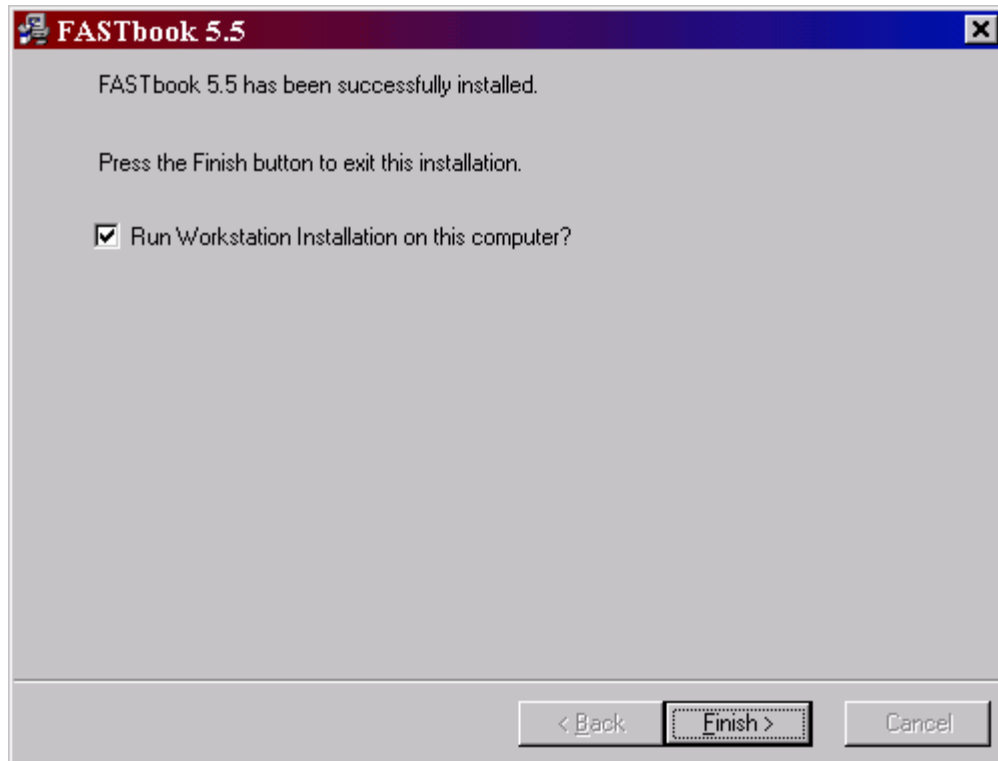


Click "Next" on "Information page" to continue with Firebird Database Server 1.5 Installation



To complete the install - choose "Yes, restart the computer now" and click "Finish".





You have now completed the server portion of the installation.

- If you want to run the Workstation Installation for the server - check mark the box "Run Workstation Installation on this computer" and click on "Finish".
- If you do not want to install workstation at this time - make sure there is no check mark selected and click "Finish".

For more information on Firebird documentation - visit their website:

<http://www.ibphoenix.com/>

## 2.3 Part 2: Running WSetup50.exe

### Part 2: Running WSetup50.exe

Now that you have run the initial setup program, you need to run the workstation setup on each of the workstations where **FASTBook** will be used. However, before running the workstation, here are some basic things to know about workstation installation.

- The workstation installation consist of two components: Borland Data Base Engine (BDE) and Firebird ODBC (Driver).
- The BDE primarily tells the client where the data base path is.

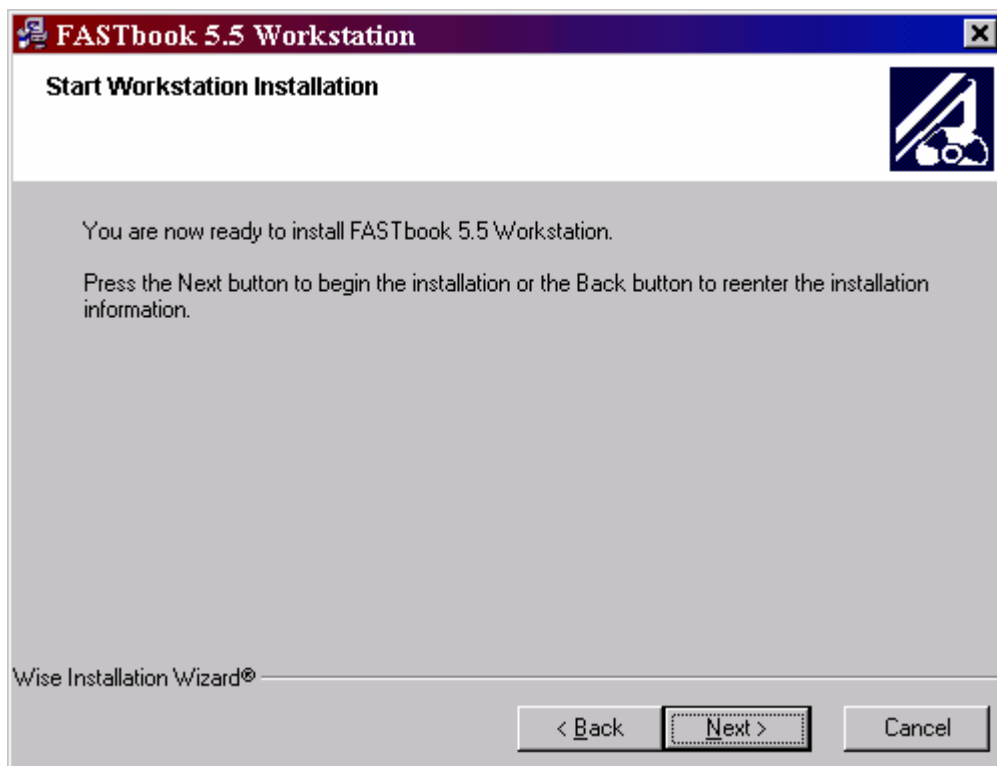
- The Firebird ODBC Driver allows the Fastbook application access to the Firebird Data Base.

**Some things to keep in mind before starting Workstation Installation:**

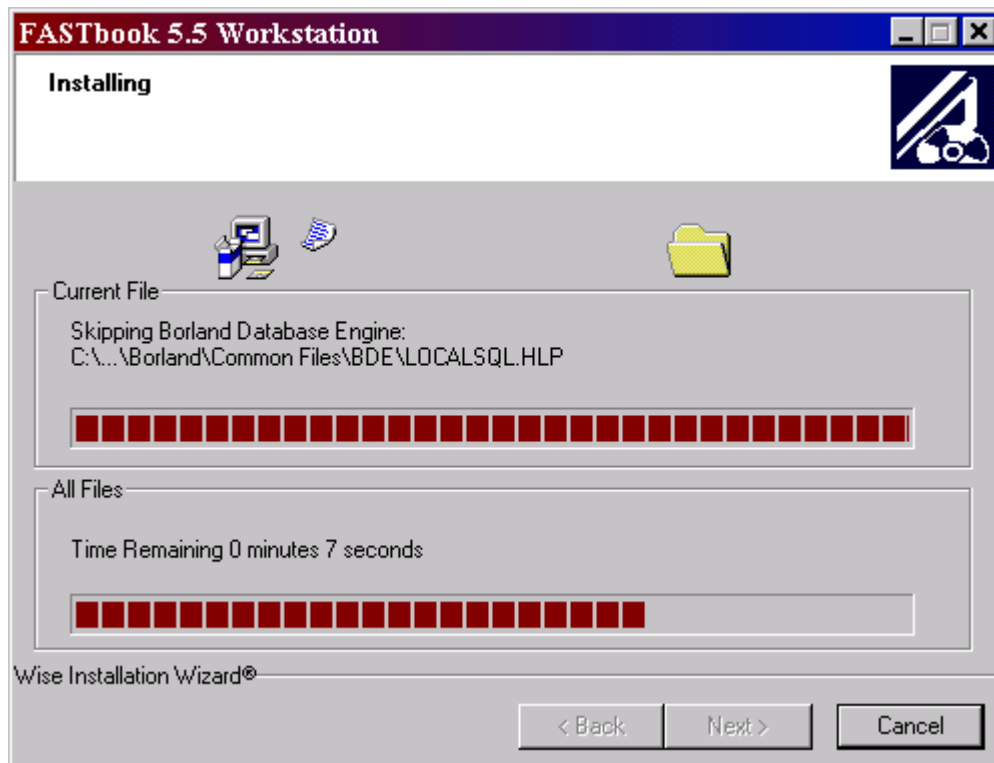
- Must have administrative rights/permissions before running the installation.
- If the workstation is behind a firewall or running Windows Firewall will need to add exceptions:
  - Add a Port - 3050, TCP
  - Add Program - Fastbook path c:\fbwin50\bin\Fastbook.exe

**To start workstation installation:**

- Run wssetup50.exe from: \fbwin50\bin directory.



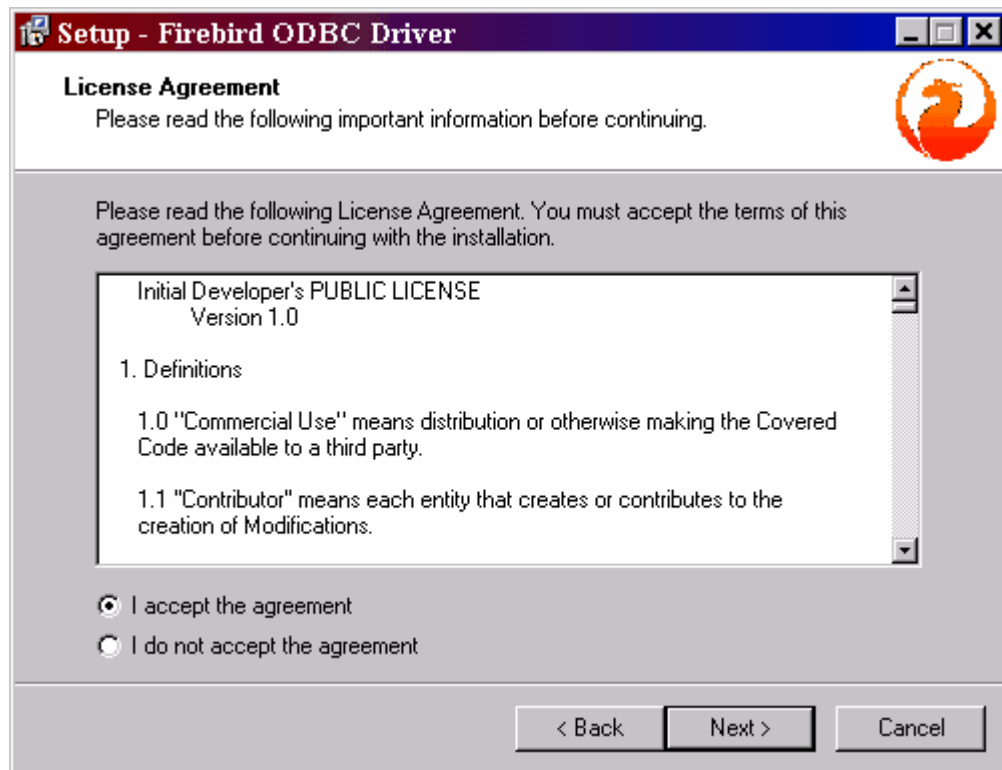
Click "Next" to start the workstation installation.



When the setup program gets to the point where it will install the Firebird ODBC Driver, you will see a prompt that looks like the following. Click "Next." to continue with the install.

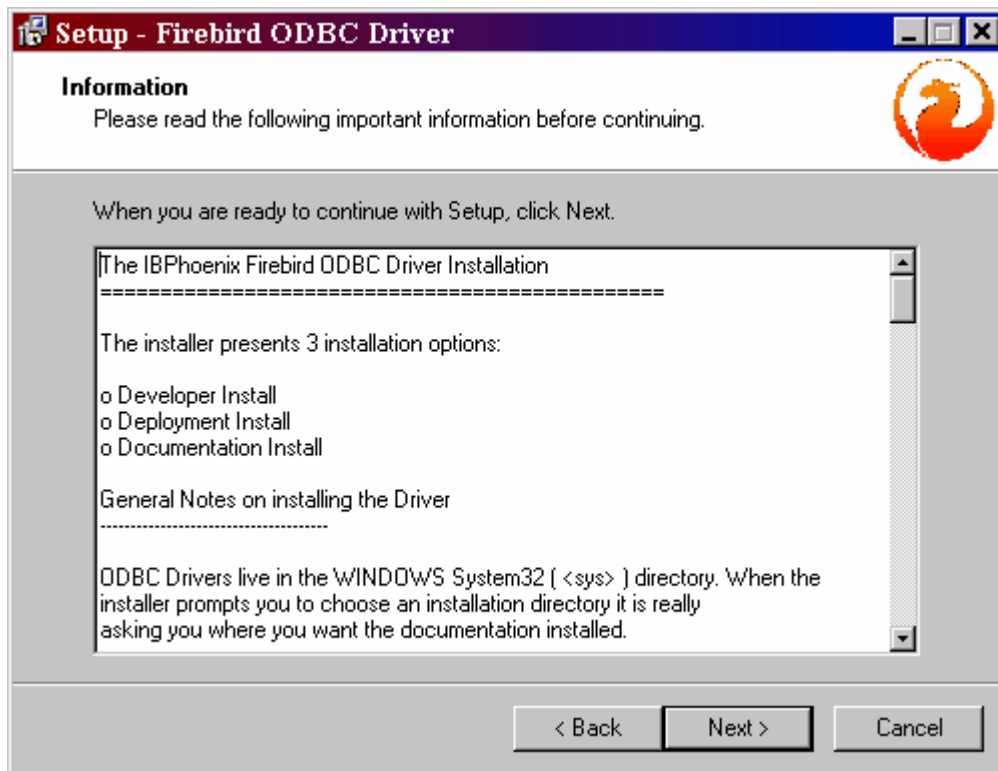


Click "Next". You will get the Electronic License Agreement read the agreement then - click on "I accept the agreement" and click "Next" to start Firebird ODBC Driver Installation.

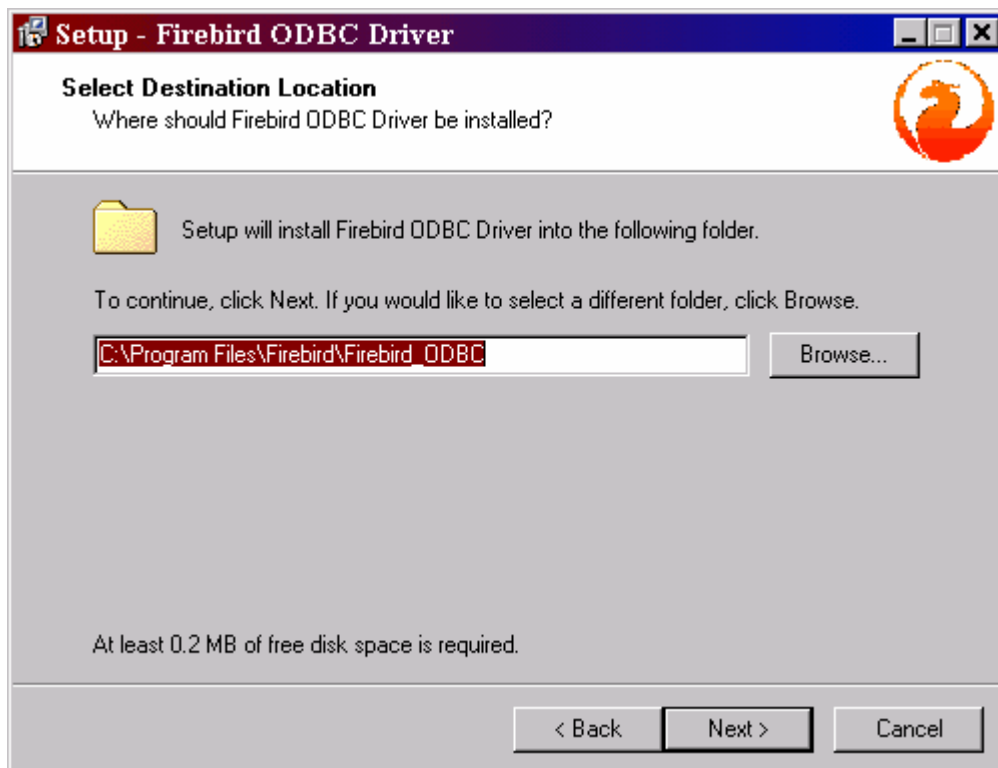


Click "Next" on the "Information Page" to continue with Firebird ODBC Installation.

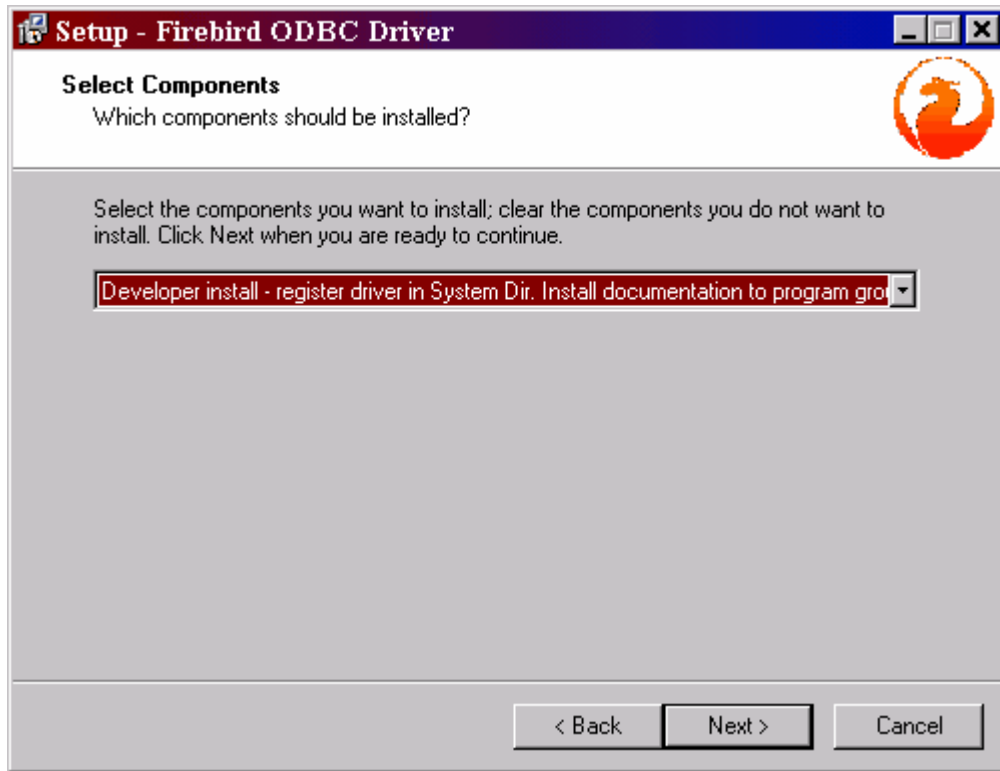




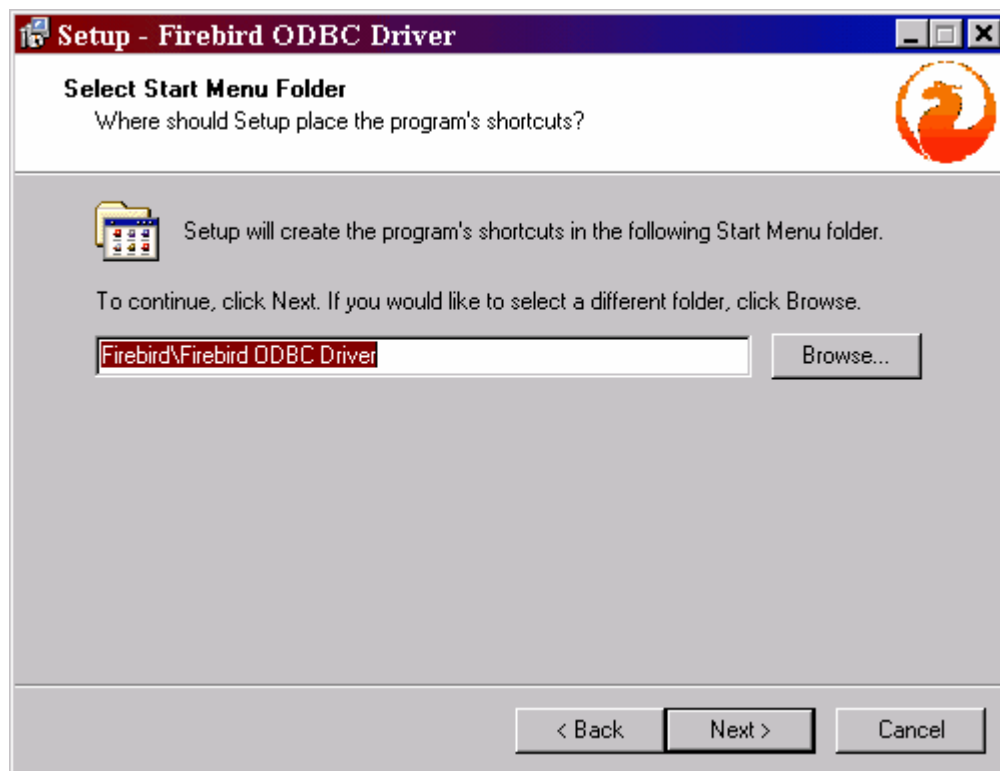
The next window will prompt you for the location you wish to install Firebird ODBC. If this is a local installation, in most cases this will be your c:\ drive. Click "Next" to continue installation.



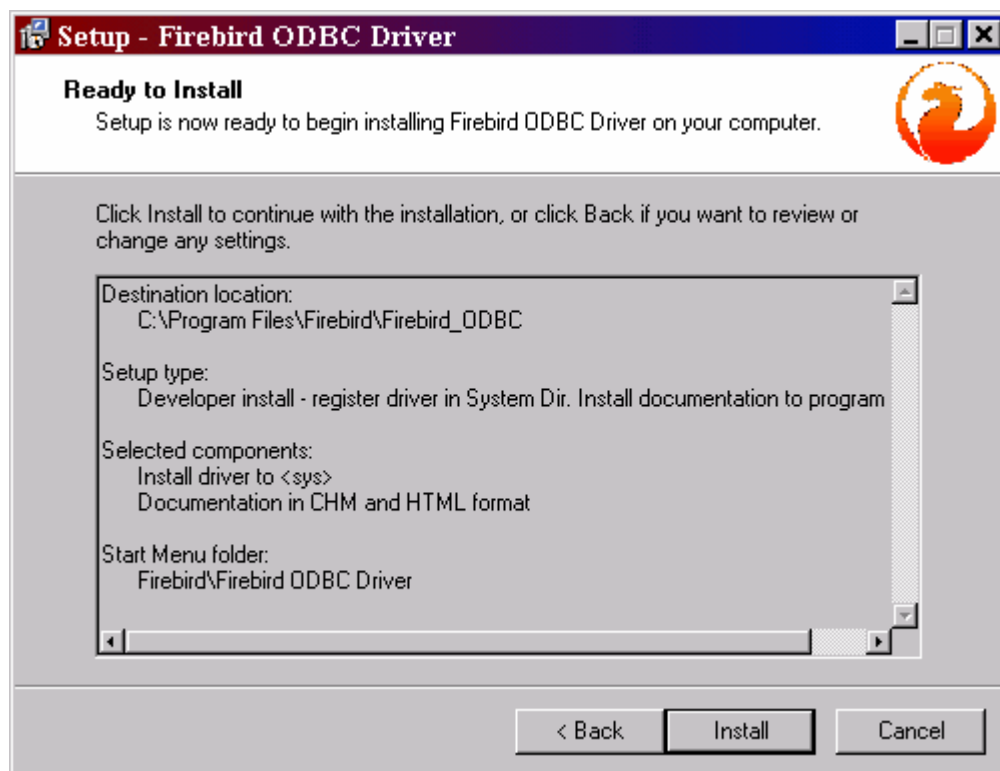
At the Select Components window - select the "Developer install" and click "Next" to continue.



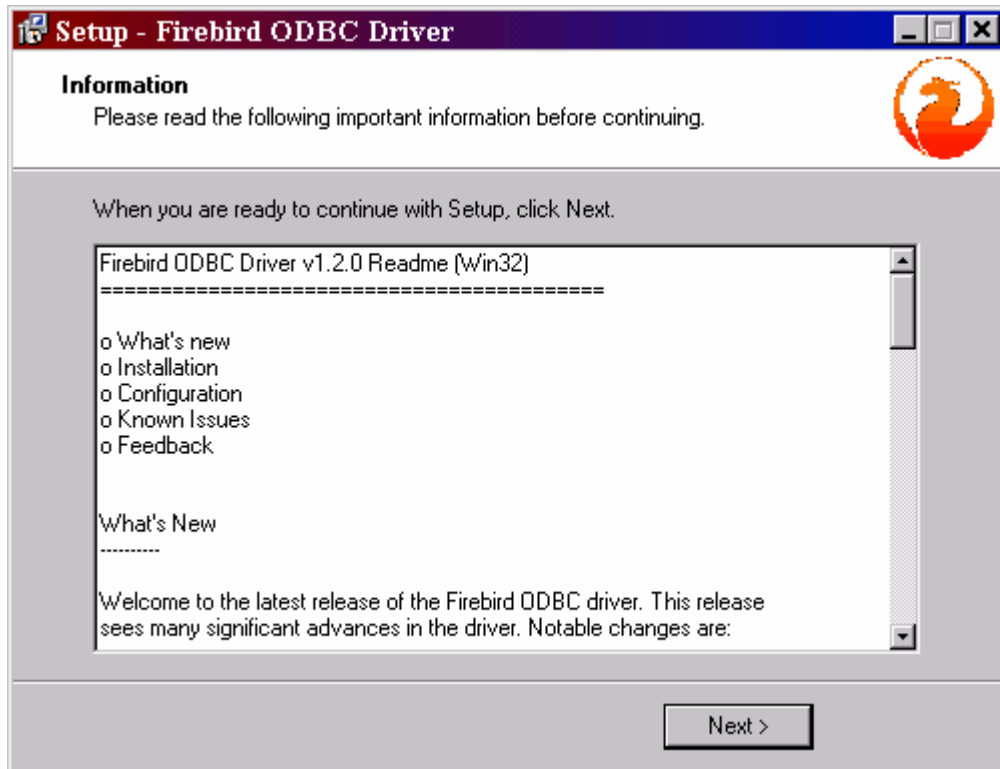
At the Select Start Menu Folder - stick with the default Firebird\Firebird ODBC Driver and click "Next" to continue.



At the Ready to Install Window - click "Install" to continue.



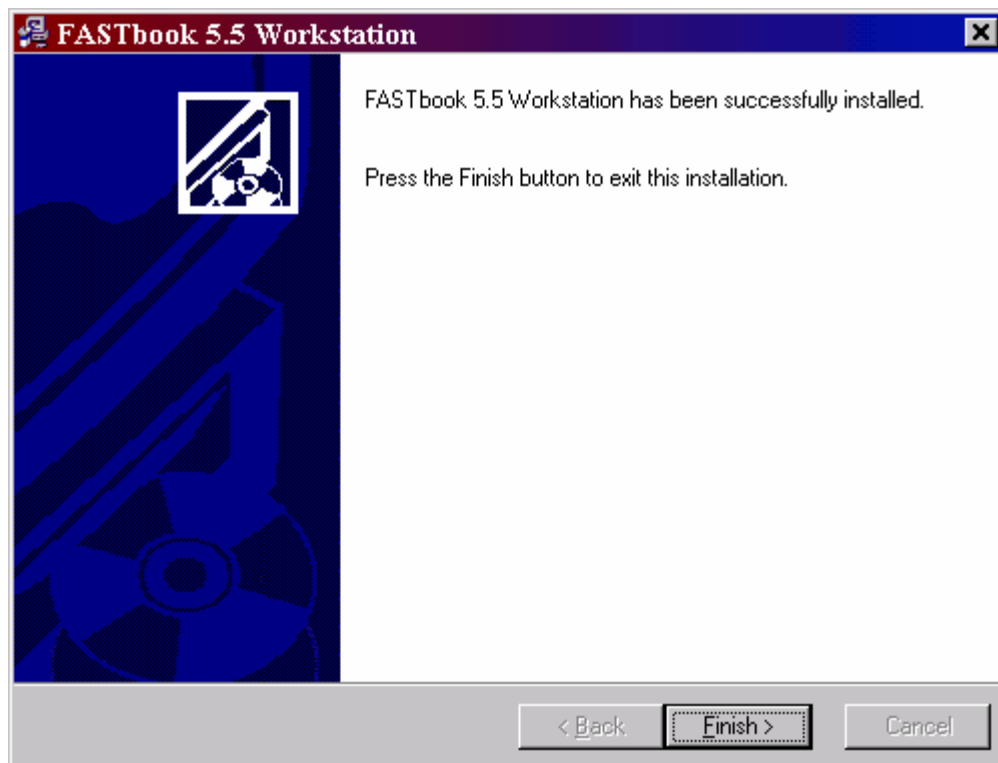
Click "Next" on the "Information Page" to continue with Firebird ODBC Installation.



Click "Finish" to complete Install of the Firebird ODBC Driver.



A final window will be displayed, showing that your installation has finished. Click "Finished."



**FASTbook** is now ready to be used on this workstation. Go on to Step 3 then repeat steps 2 and 3 for each machine where **FASTBook** will be used.

## 2.4 Part 3: Verifying Installation

Now that you have run the installation program and you have run the workstation setup, you will want to verify that it was installed successfully. To do this, start **FASTbook** by double-clicking the icon on the desktop. Sign into **FASTBook**, using the login name 'SUPERVISOR' and the password 'SUPER'. (Note: the default password can be changed in Chapter 4: Section 4.4 User Accounts and Security).

If you successfully sign into FASTbook then the installation was successful and you are ready to begin using FASTbook.

### 2.4.1 Conclusion

The steps for installation of **Fastbook** are divided into three sections. First, run the installation program from the **FASTBook 5.5 Installation CD**. Second, once the installation program is complete, you will need to run workstation setup on each computer where **FASTBook** will be accessed. Third, you will start **FASTBook** and check to see that the installation was successful.

**FASTbook 5.5**

# **Chapter**



**3**

Getting Started

## 3 Getting Started

### 3.1 How to read this manual

#### Buttons

Along the left side of this manual there are a number of different important symbols. The first one of these is a button. A button is a tool to get **FASTbook** to do something that would generally be unpleasant for a human to do, such as finding files, looking up prices, filing files, and examining files in greater detail. Some sample buttons are:




#### Bullets

The next important symbol is the bullet ◆ symbol.

These are throughout the manual. A bullet usually designates a single action on your part. Actions are very important. When both mouse and keyboard actions can achieve the same result, this manual combines them into the same bullet rather than a dual listing of keyboard and mouse actions.

#### Music symbol

A music symbol  followed by a "**NOTE:**" is a very important hint. A **NOTE** is an indication that what follows is a crucial part of the way **FASTbook** works. **PAY ATTENTION!** Usually if you can't get **FASTbook** to work properly, it is because you ignored a **NOTE** somewhere that would tell you how to fix the problem or work the procedure correctly.

#### Drop Downs

In many places throughout **FASTbook**, you will see a down arrow button. Your individual names for the many types of information **FASTbook** deals with are stored in these places for easy access.

- To display the list of available choices in a table, click the mouse on the button and a small window will drop down. These windows contain information from the master databases. Use them to insert predefined names or descriptions into required fields.
- Most of these lists are created so that only the first letter of an item needs to be typed into the appropriate field to display the entire word.

#### A hand symbol

A hand symbol followed by Example means an example follows



**Example:** To choose an Event Type, simply type the letter "C". The word "Conference" will appear in the field. If that is not the Event Type you were looking for, type the



second letter, or use the down-arrow key on your key board to display the next Event Type starting with the letter "C". If you know the items in your databases, this is a fast way of selecting an item without clicking on the fields down-arrow button, and then picking an item from the drop-down list.

- To close a drop-down window without selecting an item, click on the arrow-button before highlighting an item in the list or press 'CANCEL' (Red X) from the navigator toolbar.
- To select an item from the list, either click with the mouse on the item, move the cursor to the item using the keyboard arrow-keys, or type the first letter of the item you are looking for. **FASTbook** will immediately go to the item starting with the letter you entered. You can narrow the search down by typing as many letters of the item as you know.



**NOTE :** Some fields are case sensitive.

- If you have selected an item using the mouse, the drop-down list will automatically close and the selected item will appear in the appropriate field.

## 3.2 Selecting an Item in a Table or Field

### Selecting an item

- Click the mouse on the down arrow button and a combo box will drop down. These windows contain information from the master databases. Use them to insert predefined names or descriptions into required fields.
- The "Up and Down" arrows along the right side of the box (Scrollbars) allow you to view the entire list if there are more items than lines in the window.
- To move an item from the window to the field, click the mouse once on the name or use the "Up and Down" arrows to highlight your selection, and then press the <TAB> key.
- After clicking or pressing the <TAB> key, the combo box disappears and the selected information is in the appropriate field. This is called "Selecting an Item".

## 3.3 Notepad



### Using the Notepad

On the toolbars in Event Detail, you will see a green icon that looks like a notepad. It is used to add comments.

- To open the Notepad, click once on its icon.

A comment screen opens. You will notice that the Notepad has several tabs on the bottom. The first one is for the 'Event' itself. The second one for the 'Rooms' or 'Subevents', the third one for the 'Equipment', the fourth one for the 'Meals', and the fifth one for 'Labor'. If you defined any notes in the 'User Defined II' screen in the center's setup, you will see the Custom Tabs you created.

User defined event general notepads have an (E) at the end of the tab, while subevent-specific notepads have an (S) at the end of the tab. Except in the Event Tab, you will be able to use the navigator tools to maneuver around from one Subevent to the next without leaving or closing the

notepad.

To enter Notes for different Rooms, the Room doesn't need to be highlighted in the Subevent Tab.

If there are several Rooms booked and you want to add Comments to certain Rooms, you are able to use the Bookmarks to quickly switch between pages.



- To copy information on one page use the <Ctrl + C> keys.
- To then paste the comment on another page, use the <Ctrl + V> keys.

The Notepad is a free form and upper case and lower case sensitive (case sensitive). Comment lines have 'word wrap' (words automatically move to the next line when not enough spaces are available).



**NOTE:** You can create Templates in MS Word, save them as .rtf format. Open the template in one of the notes tabs by clicking on the Open Template button. Select the template you want, make any changes or additions to it and then click on save.

The screenshot shows a window titled 'Notes for rooms Room A 05/02/2005 7:00 PM - 10:30 PM'. The main content area contains a table with the following structure:

Contacts	NAME	PHONE#	CELL#	FAX#	EMAIL
<b>MANAGEMENT</b>					
Company Mgr					
Production Mgr					
TOURING					
PSM					
ASST. SM					
ASST. SM					
CARP					
PLY					
ELEC					
ASST. ELEC					
ASST. ELEC					
PROPS					
ASST. PROPS					
SDUND					
ASST. SOUND					
WARDROBE					
ASST.WRDROB					

At the bottom of the window, there is a navigation bar with the following options: Event, Room, Equipment, Meals, Labor, Production Info(E), Ticket Info(E), Basic Stage info(S), Basic house info(S).

- To close the Notepad, click on the System icon in the upper right corner or click on the close button.

## 3.4 The Zoom Button

### The Zoom Button

The Zoom button is used to bring up the Insert Client information, or to Zoom in on a Subevent to see the details. Zoom operates in Client fields or to see Subevent detail as well as other areas of Fastbook. You can easily identify whether or not the Zoom is active by its color. The active Zoom will be in color when on the client name field in Event Data or a subevent. The inactive Zoom button is gray.

- To add a new client when in the booking screen, click on the Zoom button when the cursor is in the 'empty' Client Name field. **FASTbook's** client setup screen will pop up. Enter the new client.
- To edit an existing client while in the booking screen, click on the Zoom button when the cursor is in the Client Name field with the Client Name you want to edit **highlighted**. **FASTbook's** client setup screen will pop up with the client information you requested. Edit the current information
- To add to or edit the Subevent when in the booking screen, click on the Subevent you want to view then click on the Zoom button. **FASTbook's** Subevent detail screen will pop up. Make any changes or additions to the Subevent including adding or viewing your room drawing.

## 3.5 The Search Button

### The Search Button

The Search button is used to assist you in finding various information using certain criteria.

- To find an event, click on the Search. A screen will pop up, allowing you to select several search criteria. If you want to Search by anything other than event number click on the drop down button to select how you want to search.

**Event Search**

Event Name:  Event #:

Client:  Contact:

Client:  Start Date:  Coordinator:

Category:  End Date:  Booked By:

Location:  Status:

Event #	Event Name	Client	Contact	Location
▶ 69	Auto Show	Auto Shows Inc	Terry Hines	
38	National Auto Show	Auto Shows Inc	Terry Hines	Cactus Conventior
39	National Auto Show	Auto Shows Inc	Terry Hines	Cactus Conventior
40	National Auto Show	Auto Shows Inc	Terry Hines	Cactus Conventior
26	National Auto Show	Auto Shows Inc	Terry Hines	Cactus Conventior

5 events found.

- Select the search by field: Select an item from the drop down that you wish to searching on.
- When list of searched items appears, click on the item you want, then click on the "Go to Event" button.

### 3.6 The Navigator Button in Setup

#### The Navigator Buttons In Setup

Use these buttons as tools to move forwards and backwards within individual databases. Each

one of the buttons operates on the field where the cursor is located.



The **"First Record"** (<Ctrl + Home>) button takes you to the first record in the database and makes it the current record. This button has an arrow pointing to a solid vertical bar on the left side.



The **"Previous Record"** (<F7>) button takes you to the record immediately before the record shown on screen and makes it your current record. This button has an arrow pointing to the left.



The **"Next Record"** (<F8>) button takes you to the record before the record displayed on the screen. It moves you forward one record in the database. This button has an arrow pointing to the right.



The **"Last Record"** (<Ctrl + End>) button takes you to the last record in the database and makes it your current record. It has an arrow pointing to a solid vertical bar on the right side.



The **"New Record" or "Insert Record"** (<F5>) button saves the information currently on the screen and then clears the screen or it inserts an empty line in a table. It allows you to enter a new record.



The **"Delete Record"** button will delete the information currently on the screen. In Event Data, the entire event, including Event Number and the Subevent(s) with all attached Resources will be deleted.



The **"SAVE"** (<F2>) icon is used whenever you have completed a record and wish to save it to the database.



The **"Cancel Changes"** (<Esc>) button will undo all changes you made to a record. But, once you click into a grid/table the entries into fields are automatically saved. The Cancel Changes button will **not** work in a table.



- The **"Search"** (<F9>) button on the **Toolbar** will open event search, allowing you to select several search criteria. If you want to Search by anything other than event name or number click on the drop down button to select how you want to search.
- Select the search by field: Select an item from the drop down that you wish to searching on.
- When list of searched items appears, click on the item you want, then click on the "Go to Event" button.

## 3.7 The Buttons in Event Detail

### The Buttons in Event Detail

Use these buttons to move forwards and backwards within events. Each one of the buttons operates on the field where the cursor is located.

The navigator button functions just like in setup. The difference is that you have two sets. Since the Event Detail window is divided into two sections, (event information at the top and subevent information at the bottom), the navigator buttons is also divided.



**NOTE:** Buttons in the top section only work on the Event part of the screen; buttons in the bottom section only work on the sub event information TABS.

## 3.8 Selecting, Deleting, and Inserting Lines in a Table

### Selecting

Usually in **FASTbook**, a field or item must be selected before you can do anything with it. Selecting an item is very easy.

The cursor location indicates the item on the screen that is selected.

To operate on the selected item (operate means that you are going to do something to the selected item, such as assign a meal and equipment to a selected room), click on the TAB below Subevents that performs the operation you wish to conduct.

To change the selected item, click the mouse (or use the arrow keys) on the item that you want to select. The black cursor will move and the highlighted item is now the selected item.



### Inserting A Line

To insert a line between two or more items shown in a table, select the item below where you want the new line to appear.

Press the 'Insert' button or cursor all the way down to the end of the list. Use the Arrow key to do so.

When adding data in a table, the data is automatically **SAVED** by pressing <TAB> at the last field of that record. Once the cursor moves to the next line, the record is saved.

### Deleting



#### In a Table

- Select the line you want to delete.
- In Event Data, click on the bottom 'Delete' button in the Navigator toolbar to delete that record.

#### In a Window

Select the item you want to delete. In Event Data, click on the top 'Delete' button to delete that record.



**NOTE:** If the cursor is in the Name or Description field in a window and you delete it, the entire record goes, not just the field. So be careful to delete only what you want!

**FASTbook** will bring up a confirmation screen when you are deleting. You must press OK in order to delete a record.

### 3.9 The Menu Bar in Setup



The menu bar duplicates the functionality of the Navigator buttons, the toolbar and some accelerator keys by allowing non-mouse users to choose the appropriate topic from a variety of attached pull-down menus which will then execute.



- To activate the menu bar, press the <ALT> key and the underlined letter of the desired menu.

**For Example:** To display the next record on any given screen, press <ALT+R> to open the Record pull-down menu, then press "N" to activate the topic Next. The system will then execute the function by displaying the next record in the data file.

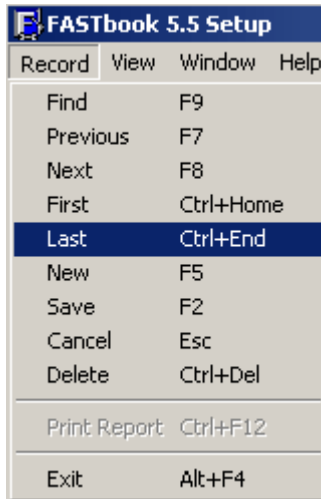
Notice, that when opening the pull-down menu, accelerator keys are indicated on the right.

These keys are "shortcut" procedures to the listed topic.

The standard action bar in **FASTbook** always features the following pull- down menus:

- **Record:** Basic database procedures
- **View:** List of Modules associated with the program
- **Window:** Rearrange the window
- **Help:** Help menu

### 3.9.1 Record Pull-Down Menu

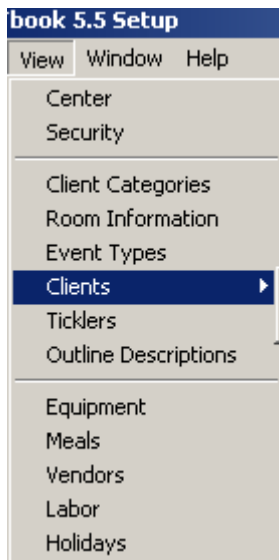


The record pull-down menu contains the most commonly used navigational function keys, which allow you to manipulate records in several ways. You can create new records, save records, browse records, find records, and delete records.

#### Menu Topics

Find Key	<F9>	New Key	<F5>
Previous Key	<F7>	Save Key	<F2>
Next Key	<F8>	Cancel	<ESC>
Find first Key	<CTRL+HOME>	Delete Key	<SHIFT+F2>
Find last Key	<CTRL+END>	Print Report	<CTRL+F12>
Exit Key	<ALT+F4>		

### 3.9.2 View Pull-Down Menu



The view pull-down menu allows you to access individual sub-screens associated with the current entry form.

- ◆ To open the view pull-down menu, press <ALT+V> or press <F10> and the letter V.



- ◆ Highlight the topic of your choice by either pressing the underlined letter or using the arrow keys for cursor navigation.

- ◆ Press <ENTER> to access the topic.

If an arrow follows the topic a sub-menu will be displayed. Select your choice and press <ENTER>.



- ◆ The system then displays a secondary window or table on top of the active entry form.

**For Example:** If you are working on the clients master screen and you would like to open the labor entry form, press <ALT+V> or press <F10> and the letter "V" to open the view pull-down menu. Then highlight the topic "Labor" or press the letter "L" to open the labor screen. You can also press the Labor button.

### 3.9.3 Windows Pull-Down Menu

The Window pull-down menu enables you to quickly rearrange your screen, so that windows and icons are easy to see.

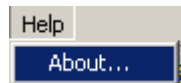


Tile resizes and arranges all open windows horizontally and vertically side by side so that all windows are visible by dividing the given area by the number of open windows.

Cascade resizes and layers the open windows so that each title bar is visible. Arrange All arranges all minimized window icons evenly on the bottom of the main setup screen

### 3.9.4 Help Pull-Down Menu

The help pull-down features different ways to access the help utility. You can move, re-size, minimize, or maximize the help window.



### 3.9.5 The Next Record Key <F8>

By pressing <F8> on selected fields, the system displays the next available record.

If the panel is cleared and you press <F8>, the system will display the last record in the data file. Once the last record has been reached, the color of the 'NEXT' button will change from blue to gray.

### 3.9.6 The Previous Record Key <F7>

By pressing <F7> on selected fields, the system displays the previous record.

If the panel is cleared and you press <F7>, the system will display the first record in the data file.

Once the first record has been reached in the data file, the system will notify you by changing the 'PREVIOUS' button color from pink to gray.

### 3.9.7 The Add/Insert Record Key <F5>

The clear/add key (F5) allows you clear the panel of all data in order to add new information into the entry form.

If data is present on the entry form that has not yet been saved, it will be saved as soon as you press the <F5> key.

### 3.9.8 The Save Record Key <F2>

The save key (F2) allows you to store input data of an entry form into the appropriate database.

◆ To save a record, complete all necessary information in an entry form, then press <F2> to save your entries.

### 3.9.9 The Exit Record Key <Alt +F4>

The exit key <ALT+F4> allows you to close the current entry form and return to the previous screen.

If you are in the Task Organizer, the exit key closes the entire application and returns to Windows.

The escape key <ESC> has the same effect as the exit key.

### 3.9.10 The Combo Box

The combo box allows you to display a pick list that shows previously saved input for a particular field. This is a useful tool when attempting to find a record you wish to edit or browse. To activate the combo box, click on the down-arrow button in the upper right hand corner of the field with your mouse. Most fields allow for pressing the <F4> key.

**FASTbook** then displays a table of entries for the field. Most entry screens feature at least one combo box field which is usually a record identifier, such as a name or a description.

To select an item from the table, either click on it with your mouse, or use the up and down arrow keys on your keyboard to highlight the item. Press the <ENTER> key to confirm your choice. To close the combo box, simply click on the arrow key again, or press the <F4> key.

### 3.9.11 The Toolbar Setup

#### The Toolbar in Setup

The toolbar contains buttons that when clicked execute a particular function. It is located at the top of the screen and changes its appearance depending on the screen you are working with.



The navigation buttons are on the left side.

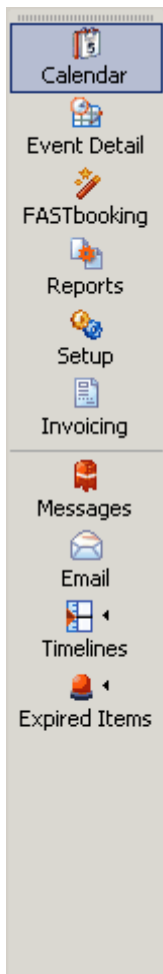
Buttons used to access other modules or functions are on the right side..



**NOTE:** The toolbox can only be used with your mouse. To execute any of the above listed functions, open the Record or View pull-down menu, and choose the appropriate topic.

### 3.9.12 Fastbook's Toolbar

If you open **FASTbook** you will see a Toolbar that contains buttons to give you immediate access to all modules (Set-Up, Calendar, Event Data, **FASTbooking**, and Invoicing).



### 3.9.13 Check Boxes



Check boxes are used throughout FASTbook system whenever you have the choice of making multiple selections.

All check boxes are initially in OFF position. To select an option simply click on the square box with your mouse, or if you don't have a mouse, use your <TAB> key to select the option you want and press the SPACEBAR to fill the box with an 'X'.

### 3.9.14 Radio Buttons



Radio buttons are used throughout *FASTbook* system whenever you have to choose one of several options.

All Radio buttons are initially in OFF position. To select an option simply click with the mouse on the hollow circle or if you don't have a mouse, use your <TAB> key to select the radio button group and move to the appropriate selection using your arrow keys to fill the hollow circle.

### 3.9.15 The Bubble Help

When you move your cursor over a button or other specific fields, you will see a yellow bar appearing that contains a brief message or a description of the button. The small pop-up window is displayed when the pointer remains on a button longer than one second.

The message is also displayed in the status bar in all setup windows.

If you pass the cursor over timelines in a calendar, the Event Name will appear in the Bubble Help bar.



### 3.9.16 Technical Support

If you require assistance with the program, Event Software asks that you have the following information at hand:

- The Name of your Company.
- The name of the Event Software application you are having problems with.

- A list of all error messages that you received during the application error, along with a description of what you were doing.
- Try to duplicate the error before calling. If you cannot duplicate the error, send us a fax with the above information.

The operating system you are using (Windows 98, 2000, XP, 2003 Windows NT, Netware 7.X).

Event Software offers one year of complimentary technical support.

When you are calling Tech Support please be at your computer with your application running so the technician can walk you through your problem. Please be prepared to describe exactly what you were doing when the problem occurred, the exact content of any error message including the error number, what type of computer you are using, and whether or not you can duplicate the problem.

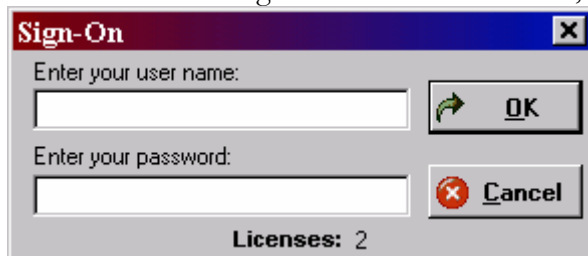
Phone #: 480-517-9990

Fax #: 480-517-9994

Email: support@eventsoft.com

### 3.9.17 The FASTbook Sign On Screen

After double-clicking on the **FASTbook** icon, the **FASTbook** Sign-On screen will appear.



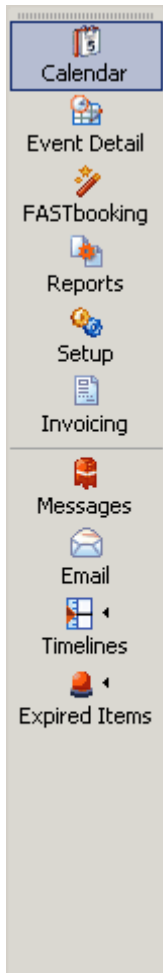
As a default your Network Login Name may be in the Login ID field.

- ◆ Press <TAB> if you want to login with the displayed name.
- ◆ To change the Login ID, simply highlight the default in the Login ID field to overwrite it with the new Login ID.
- ◆ Enter the appropriate Password.
- ◆ Press the OK button to proceed to **FASTbook**.
- ◆ Press the Cancel button to abort the **FASTbook** program.
- ◆ If you have entered the wrong password four (4) times the program will automatically abort.



**NOTE:** If you login to **FASTbook** for the first time, no Security will be set up. You have to use the default Login ID "SUPERVISOR". The default Password to go along is "SUPER".

If you pressed the OK button, the **FASTbook** program starts, and the Monthly Calendar opens as your desktop with the toolbar shown



From the Calendar you have access to Setup, Event Data, Invoicing, and FASTbooking. Also, all Timelines and Reports can be accessed.

### 3.9.18 Conclusion

This manual will guide you through Setup, Calendar, Timelines, Event Detail, FASTbooking, Invoicing, Reports and Email.

We try our best to keep the manual as current as possible, however we are constantly adding enhancements to FASTbook to make it a better product. If you find that the explanation in the manual that sounds different than what your seeing in FASTbook, please call us and we will make note the difference and provide you with the help you need.

# FASTbook 5.5

# Chapter

# 4

Setting up FASTbook

## 4 Setting up FASTbook

### 4.1 Setup



#### *Setup Modules*

Before **FASTbook** is functional, all data relevant to event scheduling must be entered into the system. This is done by first bringing up **FASTbook** and then from calendar, clicking on the **SETUP** button. Once the Setup screen is open, click on the button for a particular setup screen. Enter all the information that is related to that particular screen. A detailed explanation of this data entry and the overall function of the individual screens will be explained in their respective section.



The Set-Up modules contain all master databases and hold vital information to support your center's booking activity. The master databases are classified as either mandatory (required) or optional. The following list gives you an overview of all available Setup modules.

#### **MANDATORY**



Center Information

- Center Profile

#### **OPTIONAL**



Equipment



Meals



- User Defined		Vendors
- User Defined 2		Labor
- Status/booking		- Labor Rates
- Internet Settings		- Labor Positions
- Options		Ticklers
 Security		Outline Descriptions
- Fastbook Users		Holidays
- Security Levels		
- Groups/Departments		Ticket Type
 Client Categories		Fastbook Online Security
 Rooms		
- Room Rates		
- RoomStyles		
- Rooms		
 EventTypes		
 Clients		

## 4.2 Getting Started in setup

### Getting Started



Throughout the manual, the setup modules are explained and described in the order they appear in setup's toolbar.

That is not necessarily the order in which they should be completed.

We recommend that you first open '**User Accounts & Security**' and then complete its second tab, the '**Security Levels TAB**'.

Once you have setup your Center's Security Levels, you are ready enter the different users of **FASTbook**. Complete the first tab, the '**FASTbook Users TAB**', to enter single users and groups of users.

Once you have setup your Center's FASTbook Users, you are ready to enter the different groups

of users of **FASTbook**. Complete the last tab, the '**Groups TAB**', enter group name, then select the users in each group.



After the **FASTbook** users are entered into the '**Security**' setup database and have their different '**Security Levels**', go back to the '**Facility information**' module.

Click on Facility Information's first TAB, the actual '**Center Profile**' and fill out all applicable information as described in the Center Profile section in the manual. Also if your center has several sites and you need to set up different Locations, then complete the second tab, '**User Defined TAB**', third tab, '**User Defined 2**', fourth tab, '**Status/Booking TAB**', the fifth tab, '**Internet Settings TAB**' and the sixth tab, '**Options**'.



The '**Client Categories**' database needs to be set up next, because its data is needed to complete Room Rates, Clients, Equipment, Meals, and Labor Rates. If you don't use different Client Categories, you need to enter at least one category that could be called 'standard' or 'basic'.

All other mandatory modules, '**Rooms**' and '**Event Types**' can be completed in any order you like as well as all other modules.



If your center has on-site and vendor supplied catering, it is necessary to finish the '**Vendor**' database before entering Meals.

If your center schedules labor assignments for in-house and vendor supplied employees, the '**Vendor**' database should be completed before entering Labor.

## 4.3 Facility Information



### Facility Information



**NOTE:** The Facility information setup module consists of 6 tabs: the '**CENTER PROFILE**' setup, the '**USER DEFINED**' setup, the '**User Defined 2**' setup, the '**STATUS/BOOKING**' setup, the '**Internet Settings**' tab and the '**Options tab**'. The TABS on the top of the window allow for easy swapping between pages, and because the TAB for the page you are working on is always highlighted in the screen color, there will never be a doubt about what page you are working on.

#### **TAB 1: Center Profile**

Center Profile database is where the center's supervisor will configure the various options available to **FASTbook** users.

### Setting Up The Center Profile

- From the View Pull-Down Menu in the Actionbar, pick Center Information by clicking on it or use your mouse to click on the Center Profile button in the toolbar.
- The Center Profile window opens.

The top part of the screen is for your center's information.

Center Name and Software Serial Number are provided by Event Software Corporation. You will not be able to change these. The Serial Number is needed to assist you with technical support.

- To enter your center's information, click in the first Address field and type in the Address. Press <TAB> to advance to the next field.

Fill out all applicable information and press <TAB>, or use the mouse to move the cursor forward.

### Notifications

The notification section consists of one check box for Event Coordinator and four lines: Administrator, Equipment Coordinator, Labor Coordinator, and Meals Coordinator. The Center Profile allows you to assign a recipient of messages concerning each of these four categories.

- To assign an Event Coordinator, turn the check box on. This will send a message to Event Coordinator assigned to the event in Event Data.
- To assign an Administrator or coordinator, click on the combo button next to the field. A Screen pops up. Click on the responsible person's Log-in Name.
- The Coordinators Name will now transfer to the Center Profile screen. Press <TAB>.

- To indicate how many days prior to the event a coordinator should be notified of any changes, type the number of days in the appropriate field.

**Example:** For the recipient of the Equipment Messages to be notified of any changes in the equipment use, an event must be booked, equipment has to be assigned, altered, or deleted within the number of days defined.



**NOTE:** System Messages are generated every time something has changed at the event level. The messages are protected; they only appear to the person that they are assigned to.

**Tickler Notification**

Turning this Checkbox ON allows **FASTbook** to send Tickler messages to individuals, when logging into the system.

**Locations**

In the location section you are able to set up the different locations of your center. SET UP LOCATIONS ONLY IF YOU HAVE MULTIPLE SITES. Setting up your different site Locations is important for the Rooms and Equipment setup screens.



**NOTE:** If you have only one location (site), you do not need to enter anything into this field.

- Turn the 'Are you Managing multiple Sites' check box on. Press <TAB>.
- Enter the first location into the table. Press <TAB>.

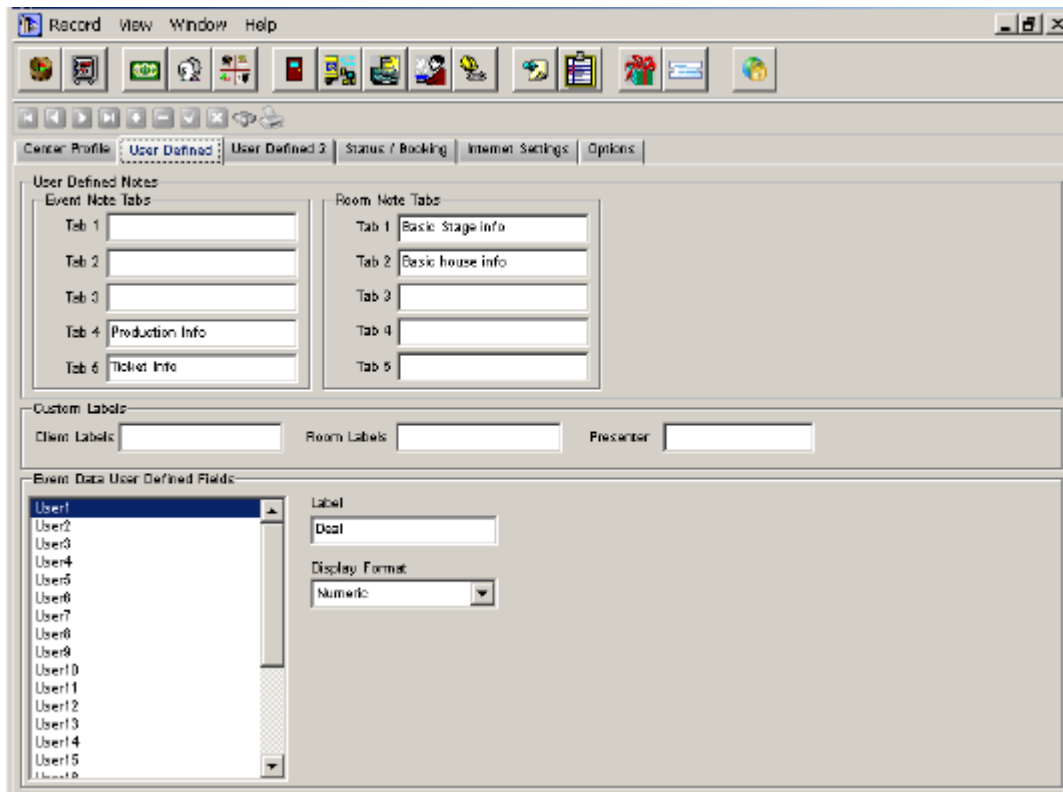
**FASTbook** will save the record and you are ready to enter the next location.

- Proceed until you have all the locations of your center setup. Press <TAB> after each entry.
- To get out of the table without using your mouse, press Post Edit.

**TAB 2: User Defined**

In the top section of the screen, you are able to define names for 10 NOTE PAD TABS in Event Data, (5 event level and 5 sub-event level). Let's say that you need an extra NOTEPAD for comments regarding Housekeeping. Simply place your cursor in the first note field and type the word 'Housekeeping'. If you wanted to tie the Housekeeping NOTEPAD to a sub-event, you would use the sixth note field. If you now click on the NOTEPAD in Event Data, the NOTE PAD pops up with 6 different TABS: Events, Rooms, Equipment, Meals, Labor, and Housekeeping.

To see the new field and TAB descriptions in place, you need to close Setup and open Event Data.



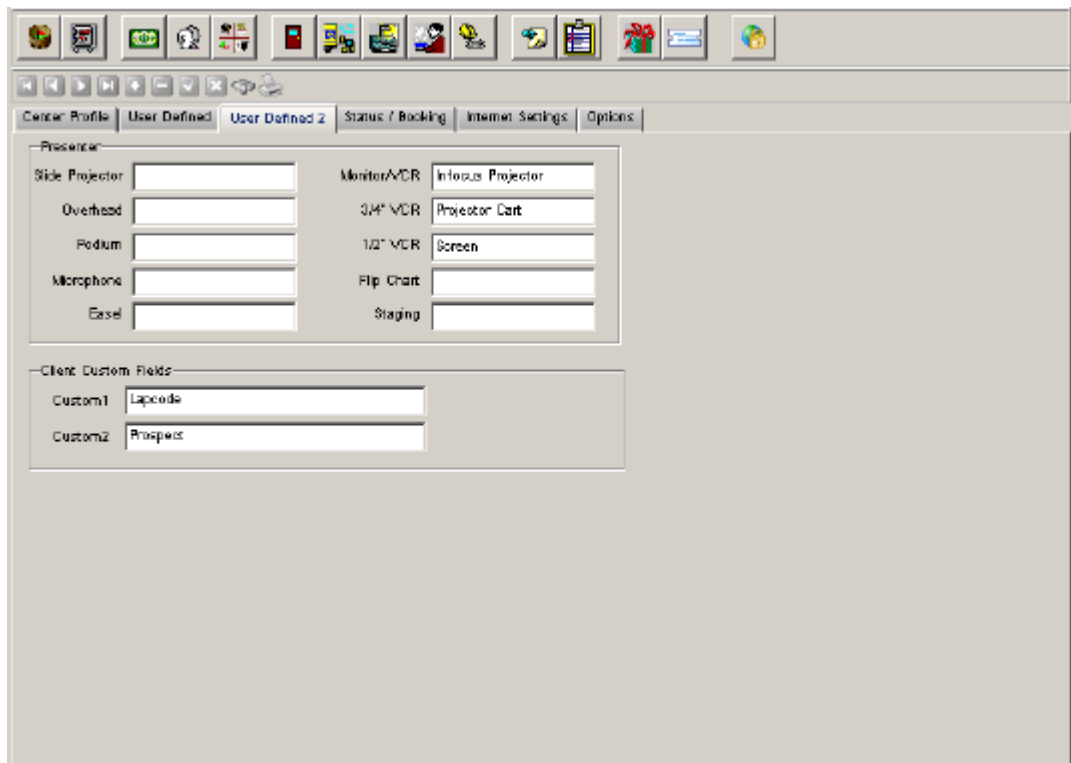
The bottom section will let you define 24 fields throughout **FASTbook**. Information entered in the fields called 'User 1' through 'User 24' will appear in the 'Custom 1' and 'Custom 2' TABS. Define your expression for the 'Client', 'Room' and 'Presenter' databases in the fields that are located in the center of the screen.

**Example:** If you are using the word 'Hall' instead of 'Room' and you typed it into the field next to the room label, **FASTbook** will use the word 'Hall' throughout the program--even the buttons and Tabs will be changed.

### TAB 3: User Defined 2

Define the Names of all 'Audio Visual Needs' checkboxes in the Presenter TAB in Event Data in the Presenter Section fields 'Presenter 1' through 'Presenter 10'.

- Simply type the expression you want to use in the appropriate field. Press <TAB> to advance to the next field.

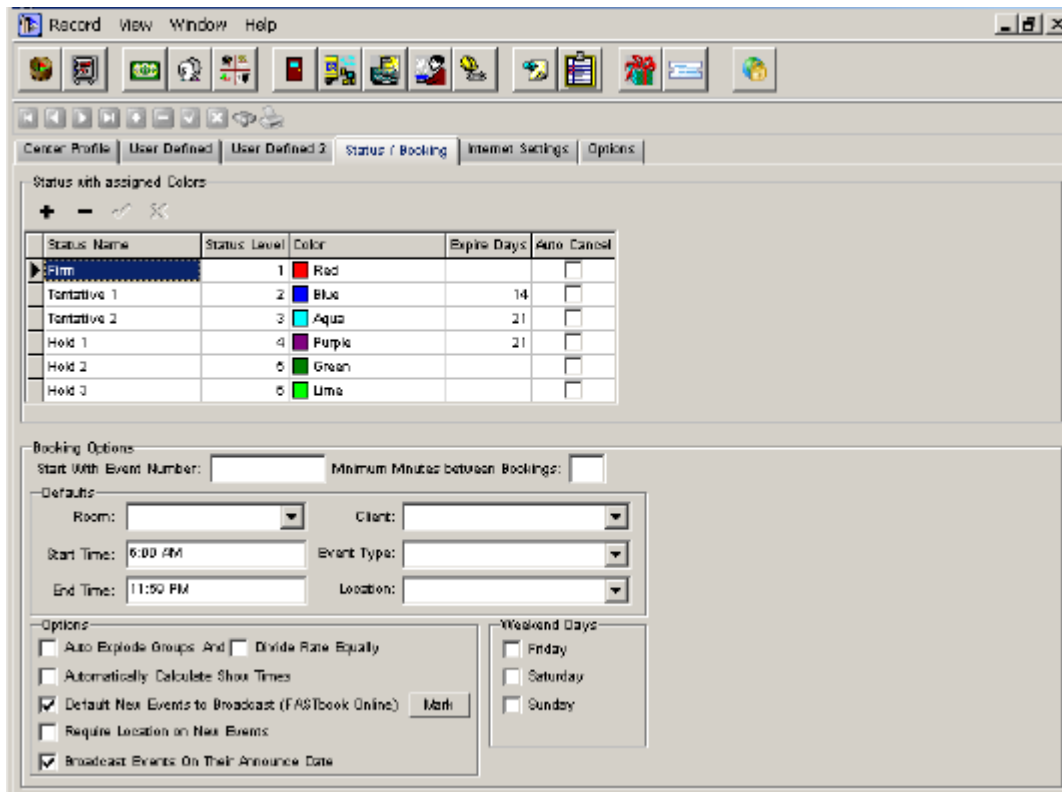


**TAB 4: Status/Booking**

**Status**

In the Status database, you will be able to assign 6 different Statuses to user-defined colors. This is very important when you are using the Timelines. If your facility uses more than one expression for a tentative booking, you will be able to set up the proper terminology in this window. Click on the Status/Booking tab on the bottom of the Center Profile window.

- The entry form changes to the Status/Booking screen.
- Type Firm in the first field. Press <TAB>.
- User defined colors will now fill the fields for the 6 different priorities
- Red for Firm Events, Blue, Aqua, Purple, Yellow, and Pink for different kinds of tentative Events. If you wish to select different colors for your status levels, click on the color wheel, next to each status level and select the color you wish to use.
- Type your Expression for the Tentative 1 on top of the Blue color. Click on the color wheel if you wish to change the status color to and select the color you wish to use. Press <TAB>.
- Enter after how many days this kind of booking expires (if applicable). Press <TAB>.
- If you want the tentative booking automatically deleted on the expiration date, press the SPACEBAR or click in the Checkbox.



- Type your Expression for the Tentative 2 on top of the Yellow color. Click on the color wheel if you wish to change the status color and select the color you wish to use. Press <TAB>.
- Enter after how many days this kind of booking expires (if applicable). Press <TAB>.
- If you want the tentative booking automatically deleted on the expiration date, press the SPACEBAR or click in the Checkbox.
- Enter all remaining Priorities (if applicable). Press <TAB>.

### Booking Options

In the booking options section, you are allowed to set up several options and defaults to define the way **FASTbook** works.



**NOTE:** All Checkboxes use positive logic. When a Check shows in the box, that function is turned on. Initially all flags are turned off.

To change the status of a checkbox, place the mouse pointer in the box and click once, or <TAB> the cursor in place and press the SPACEBAR>

### Event Number

**Before you begin entering events in FASTbook** you can change the first event number. We know not everyone wants to start with number one.

### Number Of Minutes

Type in the number of Minutes you need in-between bookings for the same room. This time can

be used as extra setup or tear-down time.  
Press <TAB>. (Optional.)

#### **Default Room, Default Start And Times**

To help speed up the booking process, you can put in defaults so that when you are booking an event, all that is needed is to check the date and book the room. Just type in the default room and the default start and end times. This works well if most of your holds are for one main room and you rent by the day, not by the hour.

Press <TAB>. (Optional.)

#### **Explode Group**

Turning this Checkbox ON will display all the rooms in a group that have been booked in the sub-event rooms tab of the event data screen. Leaving this Checkbox OFF will display only the name of the group in the sub-event window and in the timeline.

#### **... And Divide Rate Equally**

Once Explode Groups is chosen, there are two different options on how to show room-rates: The system is set to default the same room rate to each room in the group. (The room rate assigned to the group will be issued to each individual room.)

#### **Calculate Show Times**

Turning this Checkbox ON allows **FASTbook** to add setup time to start time to show the start time and subtract tear down time from end time to show the end time. Leaving this Checkbox off allows you to set independent start and end times.

#### **Weekend Days**



**NOTE:** In this section, you will be able to set up the weekend duration. This procedure is necessary when you are setting up weekend rates for rooms.

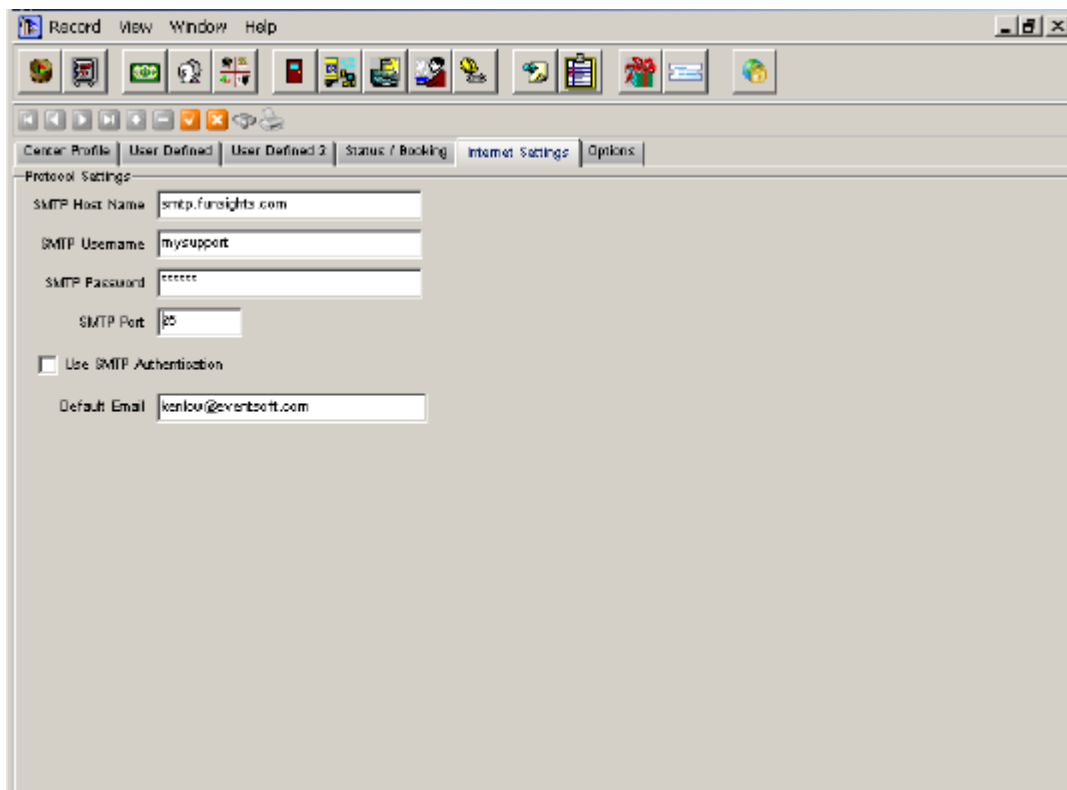
- If you want to charge the weekend rate for rooms on Fridays, click on the Friday checkbox.
- If you want to charge the weekend rate for rooms on Saturdays and Sundays, click on the Saturday and on the Sunday checkbox.

Press the SAVE button to save the Status/Booking settings.

#### **TAB 5: Internet Settings**

If you wish to send email within Fastbook, you will need to enter the internet Protocol settings for you E-mail.



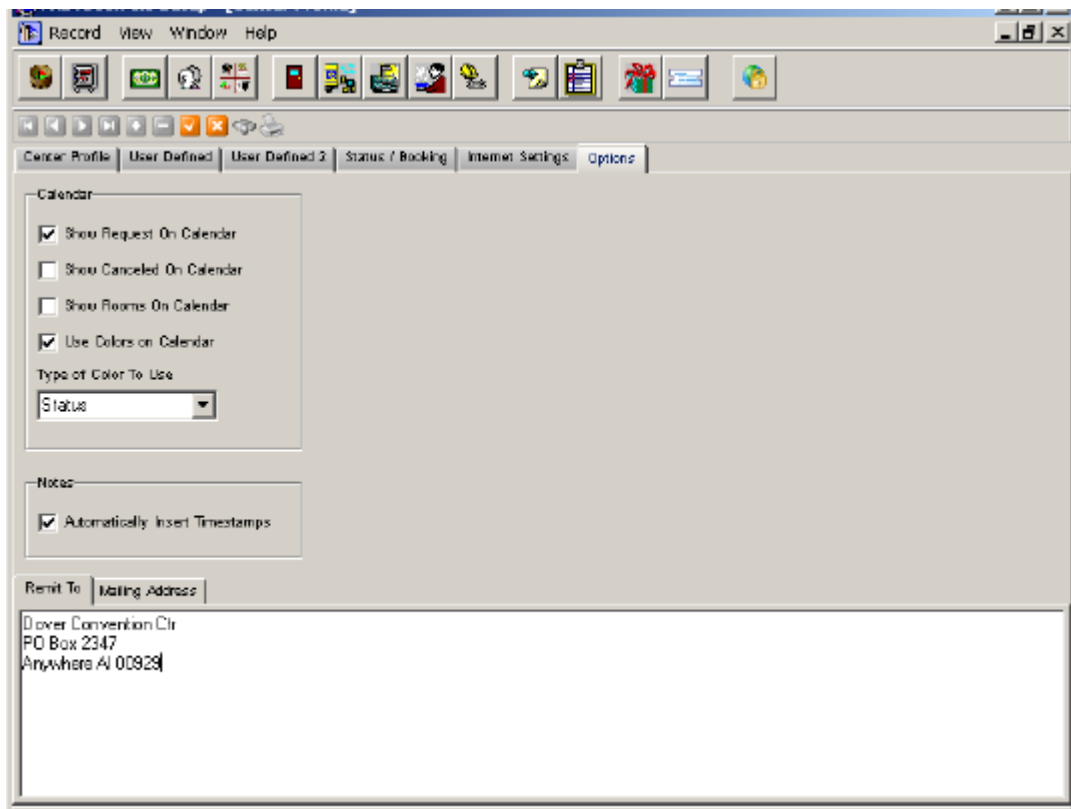


- The first setting is the SMTP Host name: Specifies your Simple Mail Transfer Protocol (SMTP) server for outgoing messages. You can get this information from your IT Department, Internet service provider (ISP) or local area net (LAN) administrator.
- The second setting is the SMTP Username: Specifies your account name. This is usually the same as the part of your e-mail address to the left of the at sign (@).

The third line is the SMTP Password: Specifies your user password, normally your server password.

#### **TAB 6: Options**

If you wish to customize the view of the calendar



- Under Calendar there are four options to choose from: Show Request on Calendar, Show Canceled on Calendar, Show Rooms on Calendar and Use Colors on Calendar.
- Type of Color to Use on calendar : Allows you to choose which color associated with: Status, Location, Event Type, Room.
- Notes: Selecting to Automatically Insert Timestamps--will automatically insert current Date/Time onto Notes.
- Remit To/Mailing Address - Allows you to customize which remit to or different address you want your invoices to go.

### 4.3.1 TAB 1: Center Profile

#### TAB 1: Center Profile

Center Profile database is where the center's supervisor will configure the various options available to **FASTbook** users.

The screenshot shows the 'Center Profile' window in FASTbook. The window title is 'Record View Window Help'. It has a menu bar with 'Record', 'View', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is divided into several sections:

- Company:** Fields for Name (EVENTS SOFTWARE DEVELOPMENT), Serial # (070158330), Address 1, Address 2, Address 3, Phone, City, State, Zip, and Website (http://www.eventsoft.com).
- Notifications:** Four rows for Administrator, Equipment Coordinator, Labor Coordinator, and Meal Coordinator. Each row has a dropdown menu, a 'Notify' checkbox, and a 'Day(s) before Event' field.
- Location (3):** A section with a 'Use Locations' checkbox and a table with columns: Location, Address 1, Address 2, Address 3, City, State, Zip, and Country. The table contains three entries: Cactus Convention Ctr., Gilcrest Theaters, and Sands Arena.

#### 4.3.1.1 Setting up the Center Profile

##### Setting Up The Center Profile

- ◆ From the View Pull-Down Menu in the Action bar, pick Center Information by clicking on it or use your mouse to click on the Center Profile button in the toolbar.
- ◆ The Center Profile window opens.  
The top part of the screen is for your center's information. Center Name and Software Serial Number are provided by Event Software Corporation. You will not be able to change these. The Serial Number is needed to assist you with technical support.
- ◆ To enter your center's information, click in the first Address field and type in the Address. Press <TAB> to advance to the next field.
- ◆ Fill out all applicable information and press <TAB>, or use the mouse to move the cursor forward.

#### 4.3.1.2 Notifications

##### Notifications

The notification section consists of one check box for Event Coordinator and four lines: Administrator, Equipment Coordinator, Labor Coordinator, and Meals Coordinator. The Center Profile allows you to assign a recipient of messages concerning each of these four categories.

- ◆ To assign an Event Coordinator, turn the check box on. This will send a message to the Event Coordinator assigned to the event in Event Data.
- ◆ To assign an Administrator or coordinator, click on the combo button next to the field. A Screen pops up. Click on the responsible person's Log-in Name.
- ◆ The Coordinators Name will now transfer to the Center Profile screen. Press <TAB>.
- ◆ To indicate how many days prior to the event a coordinator should be notified of any changes, type the number of days in the appropriate field.

**Example:** For the recipient of the Equipment Messages to be notified of any changes in the equipment use, an event must be booked, equipment has to be assigned, altered, or deleted within the number of days defined.



**NOTE:** System Messages are generated every time something has changed at the event level. The messages are protected; they only appear to the person that they are assigned to.

#### 4.3.1.3 Tickler Notification

##### **Tickler Notification**

Turning this Check box ON allows **FASTbook** to send Tickler messages to individuals when logging into the system.

#### 4.3.1.4 Locations

##### **Locations**

In the location section you are able to set up the different locations of your center. SET UP LOCATIONS ONLY IF YOU HAVE MULTIPLE SITES. Setting up your different site Locations is important for the Rooms and Equipment setup screens.



**NOTE:** If you have only one location (site) you do not need to enter anything into this field.

- ◆ Turn the 'Are you Managing multiple Sites' check box on. Press <TAB>.
  - ◆ Enter the first location into the table. Press <TAB>.
- FASTbook** will save the record and you are ready to enter the next location.
- ◆ Proceed until you have all the locations of your center setup. Press <TAB> after each entry.
  - ◆ To get out of the table without using your mouse, press Post Edit.

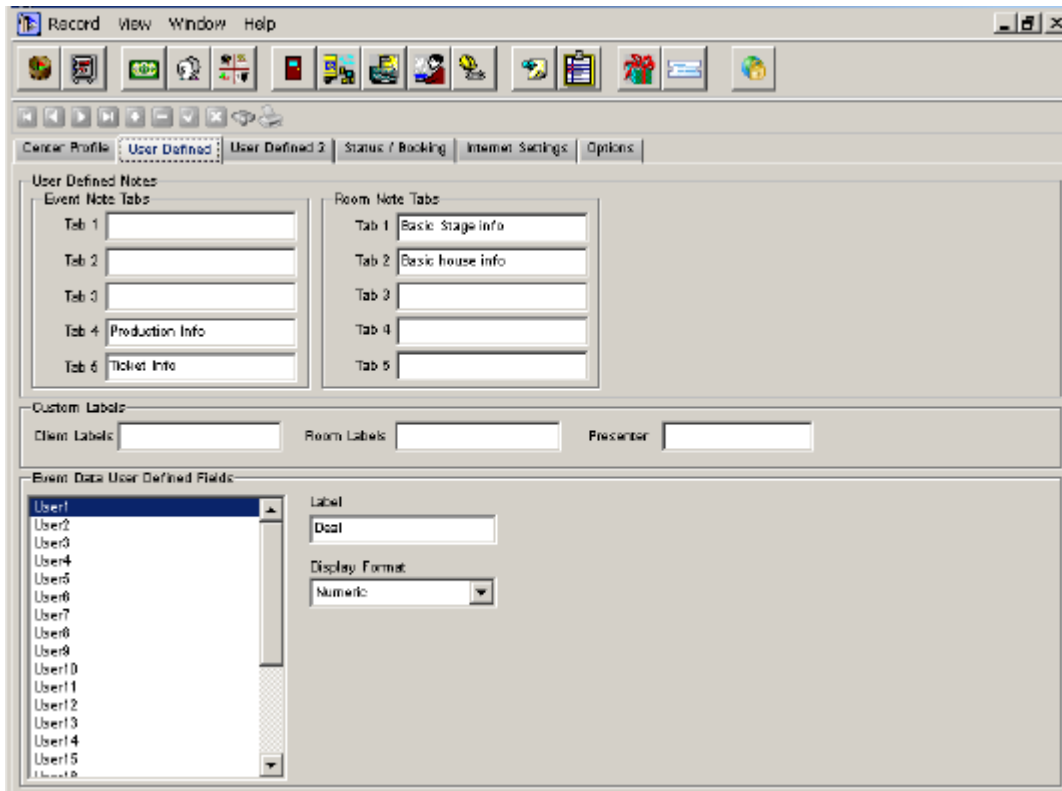
#### 4.3.2 TAB 2: User Defined

##### **TAB 2: User Defined**

In the top section of the screen, you are able to define names for 10 NOTE PAD TABS in

Event Data, (5 event level and 5 sub-event level). Let's say that you need an extra NOTEPAD for comments regarding Housekeeping. Simply place your cursor in the first note field and type the word 'Housekeeping'. If you wanted to tie the Housekeeping NOTEPAD to a sub-event you would use the sixth note field. If you now click on the NOTEPAD in Event Data, the NOTE PAD pops up with 6 different TABS: Events, Rooms, Equipment, Meals, Labor, and Housekeeping.

To see the new field and TAB descriptions in place, you need to close Setup and open Event Data.



The bottom section will let you define 24 fields throughout **FASTbook**. Information entered in the fields called 'User 1' through 'User 24' will appear in the 'Custom 1' and 'Custom 2' TABS. Define your expression for the 'Client', 'Room' and 'Presenter' databases in the fields that are located in the center of the screen.

**Example:** If you are using the word 'Hall' instead of 'Room' and you typed it into the field next to the room label, **FASTbook** will use the word 'Hall' throughout the program, even the buttons and Tabs will be changed.

### 4.3.3 TAB 3: User Defined 2

#### TAB 3: User Defined 2

Define the Names of all 'Audio Visual Needs' check boxes in the Presenter TAB in Event Data in the Presenter Section fields 'Presenter 1 through Presenter 10'.

- Simply type the expression you want to use in the appropriate field. Press <TAB> to advance to the next field.

#### 4.3.4 Tab 4 Status/Booking

##### 4.3.4.1 Status

###### **TAB 4: Status/Booking**

###### **Status**

In the Status database you will be able to assign 6 different Statuses to user-defined colors. This is very important when you are using the Timelines. If your facility uses more than one expression for a tentative booking, you will be able to set up the proper terminology in this window. Click on the Status/Booking tab on the bottom of the Center Profile window.

- ◆ The entry form changes to the Status/Booking screen.

- ◆ Type Firm in the first field. Press <TAB>.
- ◆ User-defined colors will now fill the fields for the 6 different priorities.
- ◆ Red for Firm Events, Blue, Aqua, Purple, Yellow, and Pink for different types of tentative Events. If you wish to select different colors for your status levels, click on the color wheel next to each status level and select the color you wish to use.
- ◆ Type your Expression for the Tentative 1 on top of the Blue color. Click on the color wheel if you wish to change the status color and select the color you wish to use. Press <TAB>.
- ◆ Enter after how many days this kind of booking expires (if applicable). Press <TAB>.
- ◆ If you want the tentative booking automatically deleted on the expiration date, press the SPACEBAR or click in the Check box.

Status Name	Status Level	Color	Expire Days	Auto Cancel
Firm	1	Red		<input type="checkbox"/>
Tentative 1	2	Blue	14	<input type="checkbox"/>
Tentative 2	3	Aqua	21	<input type="checkbox"/>
Hold 1	4	Purple	21	<input type="checkbox"/>
Hold 2	5	Green		<input type="checkbox"/>
Hold 3	6	Lime		<input type="checkbox"/>

- ◆ Type your Expression for the Tentative 2 on top of the Yellow color. Click on the color wheel if you wish to change the status color and select the color you wish to use. Press <TAB>.
- ◆ Enter how many days this kind of booking expires after (if applicable). Press <TAB>.
- ◆ If you want the tentative booking automatically deleted on the expiration date, press the SPACEBAR or click in the Check box.
- ◆ Enter all remaining priorities (if applicable). Press <TAB>.

#### 4.3.4.2 Booking Options

##### **Booking Options**

In the booking options section, you are allowed to set up several options and defaults to define the way **FASTbook** works.



**NOTE:** All Check boxes use positive logic. When a Check shows in the box, that function is turned on. Initially all flags are turned off.

To change the status of a check box, place the mouse pointer in the box and click once, or <TAB> the cursor in place and press the SPACEBAR

#### 4.3.4.3 Event Number

##### **Event Number**

**Before you begin entering events in FASTbook** you can change the first event number. We know not everyone wants to start with number one.

#### 4.3.4.4 Number of Minutes

##### **Number Of Minutes**

Type in the number of Minutes you need in-between bookings for the same room. This time can be used as extra setup or tear-down time.

Press <TAB>. (Optional.)

#### 4.3.4.5 Default Room, Default Start and End Times

##### **Default Room, Default Start And Times**

To help speed up the booking process you can enter in defaults so that when you are booking an event, all you have to do is check the date and book the room. Type in the default room, the default start, and end times. This works well if most of your holds are for one main room and you rent by the day, not by the hour.

Press <TAB>. (Optional.)

#### 4.3.4.6 Explode Group

##### **Explode Group**

Turning this Check box ON will display all the rooms in a group that have been booked in the sub-event rooms tab of the event data screen. Leaving this Check box OFF will display only the name of the group in the sub-event window and in the timeline.

##### 4.3.4.6.1 And Divide Rate Equally

##### **... And Divide Rate Equally**



Once Explode Groups is chosen, there are two different options on how to show room-rates: The system is set to default the same room rate to each room in the group. (The room rate assigned to the group will be issued to each individual room.)

#### 4.3.4.7 Calculate Show Times

##### **Calculate Show Times**

Turning this Check box ON allows **FASTbook** to add setup time to start time to give you show start time, and subtracts tear down time from end time to give you show end time. Leaving this Check box off allows you to set independent show start and show end times.

#### 4.3.4.8 Weekend Days

##### **Weekend Days**



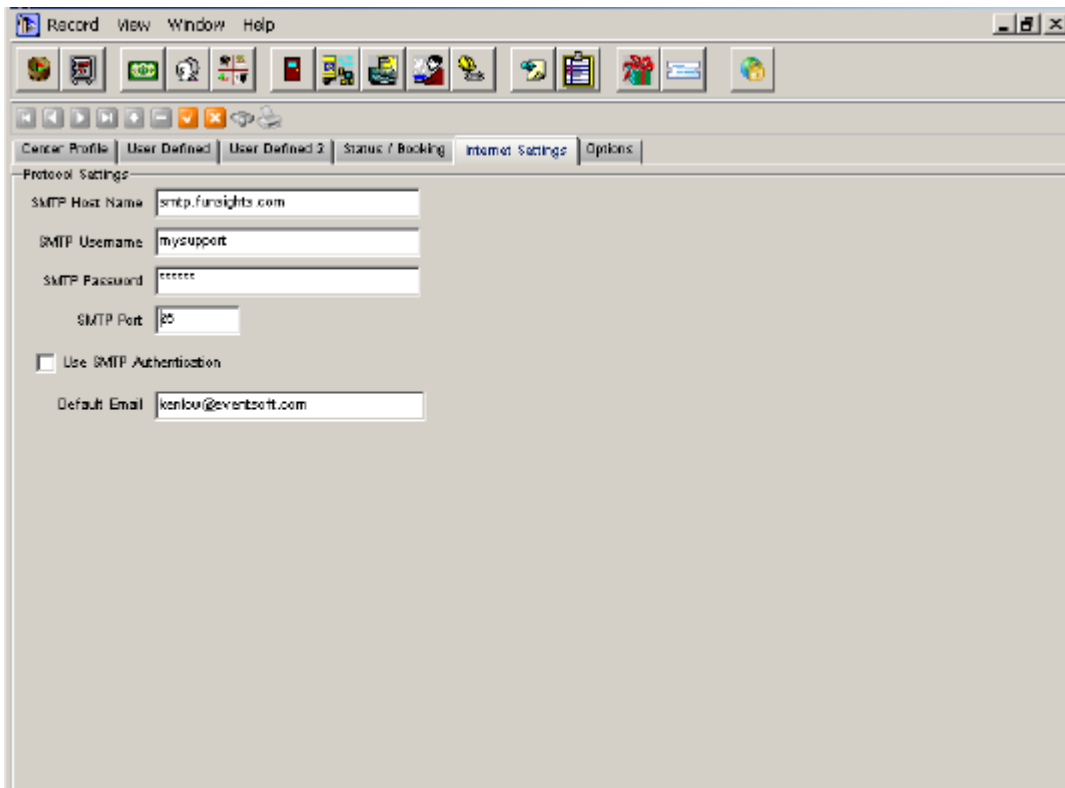
**NOTE:** In this section you will be able to set up the weekend duration. This procedure is necessary when you are setting up weekend rates for rooms.

- ◆ If you want to charge the weekend rate for rooms on Fridays, click on the Friday check box.
- ◆ If you want to charge the weekend rate for rooms on Saturdays and Sundays, click on the Saturday and Sunday check boxes.
- ◆ Press the SAVE button to save the Status/Booking settings.

#### 4.3.4.9 Tab 5 Internet Settings

##### **TAB 5: Internet Settings**

If you wish to send email within FASTbook, you will need to enter the internet Protocol settings for your E-mail.



The first setting is SMTP Host name, which specifies your Simple Mail Transfer Protocol (SMTP) server for outgoing messages. You can get this information from your IT Department, Internet service provider (ISP) or local area net (LAN) administrator.

The second setting is SMTP Username, which specifies your account name. This is usually the same as the part of your e-mail address to the left of the at(@) sign.

The third line is SMTP Password, which specifies your user password, normally your server password.

## 4.4 User Accounts and Security

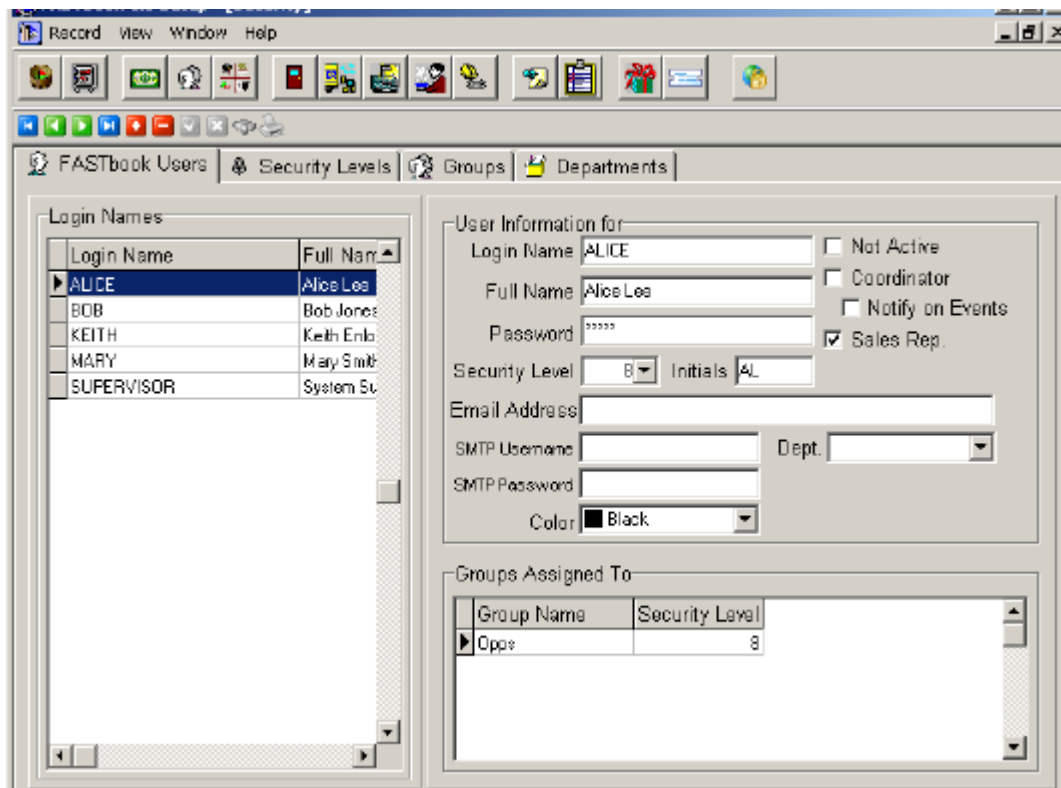


### User Accounts and Security

The User Accounts and Security database enables you to set up the different users of **FASTbook** and assign Passwords and Tickler Notification codes to them. You can also set up Security for different groups of users (e.g. The Booking Group or the Setup Group).



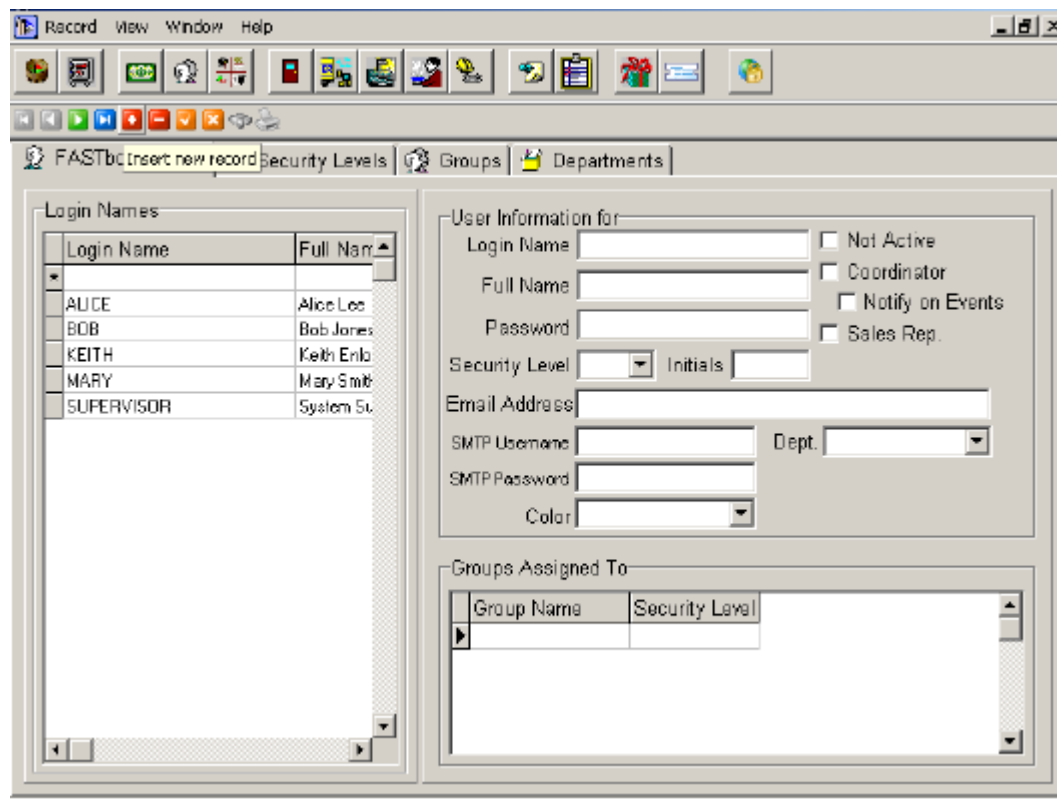
**NOTE:** Groups are used for messaging only, not for logging into the system.



**Entering Users** Use your mouse to click on the 'User Accounts and Security' button in the toolbar. The Fastbook Users window opens.

**If setting up a single User:**

- Click on the INSERT button to add a new line.
  - Type in the user's login name on the right side of the screen. Press <TAB>. The System will spell the login name in capital letters on the left side of the screen. This entry will identify the login name for Tickler Notification.
  - Type in the user's full name. Press <TAB>.
- Enter the Password. Press <TAB>.



- Type the user's Security Level. The Security Level was previously defined in Security Levels TAB. Press <TAB>.
- Enter the User's Initials. Press <TAB>.

#### **Not Active**



**NOTE:** To remove users from list, check "Not Active". They will still appear in setup but not in the rest of FASTbook

#### **Use Net Login Name**

Turning this Checkbox ON keeps the Login ID assigned by your network so you can enter the one you setup in **FASTbook**.

#### **Coordinator**

Turning this Checkbox ON allows you to assign users to the Coordinator drop down box in event data.

#### **Sales Representative**

Turning this Checkbox ON allows you to assign users to the Sales Rep. drop down box in event data.

#### **User E-Mail Address**

Enter the Users SMTP Username and SMTP Password . The SMTP Username: Specifies your

account name. This is usually the same as the part of your e-mail address to the left of the at sign (@).

The SMTP Password: Specifies your user password, normally your server password.

#### For Users Who Wish To

- If you wish to change your security password, you must have access to setup and the security module.
- Highlight your name (it will be the only one that you can view) and click into the existing password.
- Type your new password in the highlighted field.
- Click on the green check to save the change.

#### TAB 2: Security Levels

In the security Set-Up you can define security levels.

Type in the User Group's login name. Press <TAB>. The System will spell the login name in capital letters.

#### Entering Security Levels

Click on the Security Levels TAB on the bottom of the Center Profile window.

- The entry form changes to the Security screen.
- Click on the INSERT button to clear the screen.

- In the first section you are able to name the security level.
- Type in a Number for the level you want to create and press <TAB>.
- Type in the Description for that level and press <TAB>.

The Meaning of the Security Level Terms:

**USE:** This Security Level can access the modules, but if nothing else is selected, it is merely a permission to view.

In order to have Edit, Delete, and Create rights, the Use must be ON.

**EDIT:** This Security Level can access modules and make changes to existing records, but cannot Delete records from the database. It will also prevent the Creation of new records.

**DELETE:** This Security Level can access the module and delete items from the indicated database. It has no permission to Edit existing records or Create new ones.

**ADD:** This Security Level can access the module item and create a new record in the indicated database, but cannot Edit or Delete existing records.

In the second Section you are able to define how '**Setup**' is handled.

- Click on the first Checkbox called 'Use Set Up', if the level you are defining should be able to work in the Set Up modules.
- By clicking on this Checkbox, all Checkboxes for Set up will be switched to the ON position.
- If you want the level to only use the Set Up module, but not Edit, Add, or Delete in it, click on the Checkboxes in the Set Up row that are located below the Edit, Delete, and Add Columns.
- All Checkboxes will be turned OFF again accept the first column.
- If you want the level to only create within the Set Up module, but not Edit or Delete, click on the Checkboxes in the Set Up row that are located below the Edit and Delete columns.
- All Checkboxes in the Edit and Delete columns will be turned OFF.
- Indicate which databases in the level you are setting up will be usable, which ones can Edited, which ones can Deleted from, or Created in by clicking on the appropriate Checkbox.

In the third Section you are able to define how '**Booking**' is handled.

- Click on the first Checkbox called 'Use Booking' if the level you are defining should be able to work in the Booking and Report modules.
- Indicate in what way the person assigned to the level you are setting up will be able to use Booking by clicking on the appropriate Checkboxes.
- If you want to set a time limit on bookings you have two options. You can enter the End Date (like 03/07/04) into the 'Book Rooms until' field, or type in the number of 'Days in advance' (like 90).

**FASTbook** would disallow any bookings after March 7, 2004, or beyond 90 days.

In the fourth Section you are able to define how '**Resources**' are handled.

- Click on the first Checkbox called 'Use Rooms' if the level you are defining should be able to Edit, Delete, or Create records in the Sub-event Rooms module.
- Click on the second Checkbox called 'Use Meals' if the level you are defining should be able to Edit, Delete, or Create records in the Subevent Meals module.
- Click on the first Checkbox called 'Use Equipment' if the level you are
- Defining should be able to Edit, Delete, or Create records in the Sub-event Equipment module.
- Click on the first Checkbox called 'Use Labor' if the level you are defining should be able to

Edit, Delete, or Create records in the Subevent Labor module.  
In the fifth section you are able to define whether or not you want the level to use the 'Allowed Custom Notes'.



**NOTE:** You may want to setup User Definable TAB first, before setting up the fifth section.

- Define whether or not you want the level to 'Use Reports'.

In the sixth section you are able to define whether or not you want the level to use the "invoice/financial" information.

In the seventh section you are able to set up status priorities for the security level.

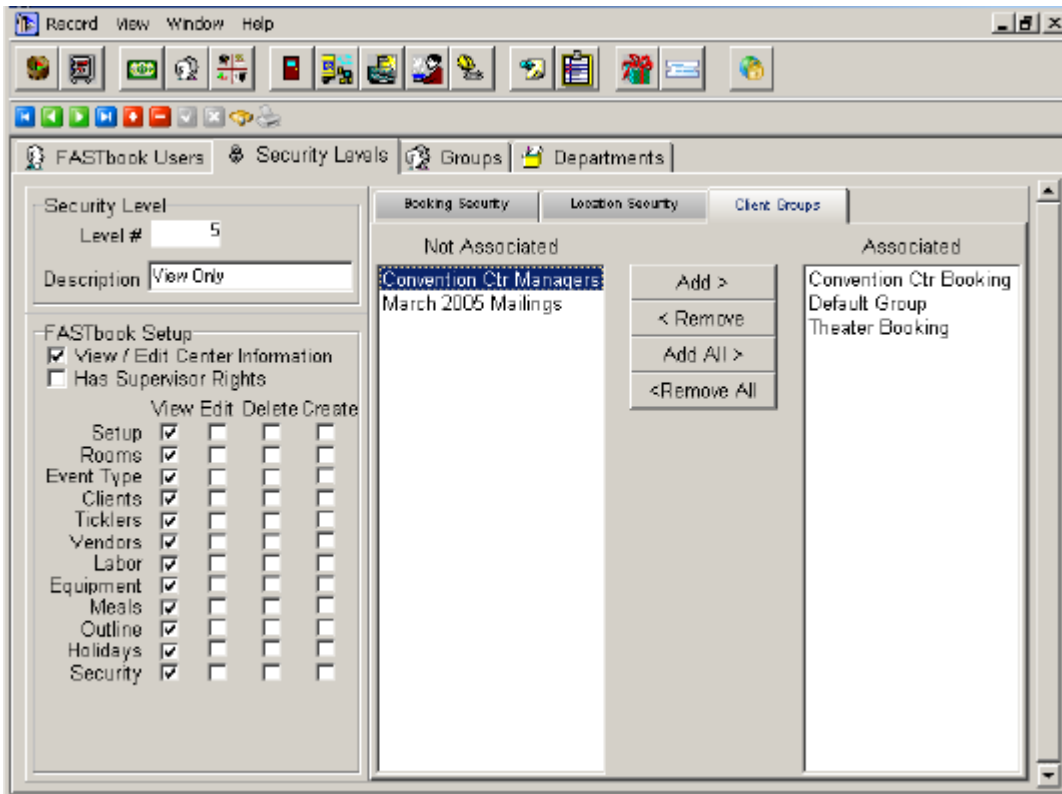
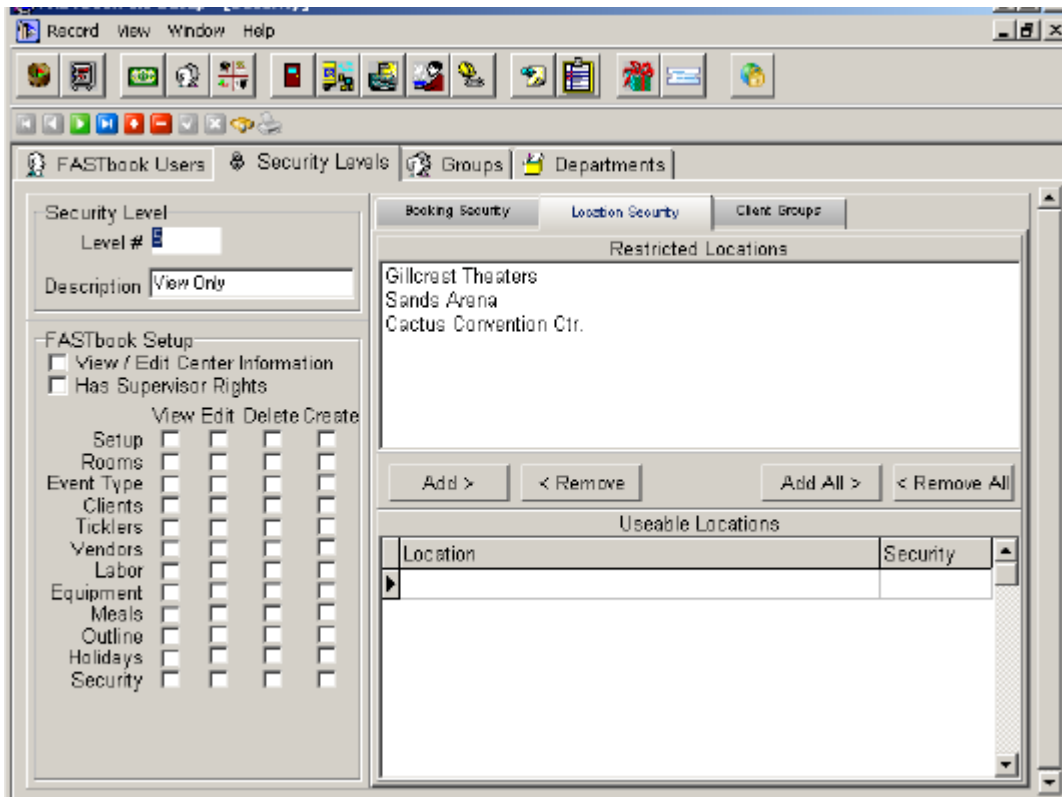
- Click on the first checkbox if you want the user to book firm events, which have a **Priority 1**.
- Click on the second checkbox if you want the user to book tentative events, with a **Priority 2**.
- Click on the third checkbox if you want the user to book tentative events, with a **Priority 3**.
- Mark all six Checkboxes if you want the person assigned to the security level you are setting up to book any event regardless of status.

Different Event Statuses can be setup in the Center Profile module on the last TAB called 'Status'.

- Click on the SAVE button to save your entries.
- Click on the INSERT button to clear the screen and get ready for the next entry.



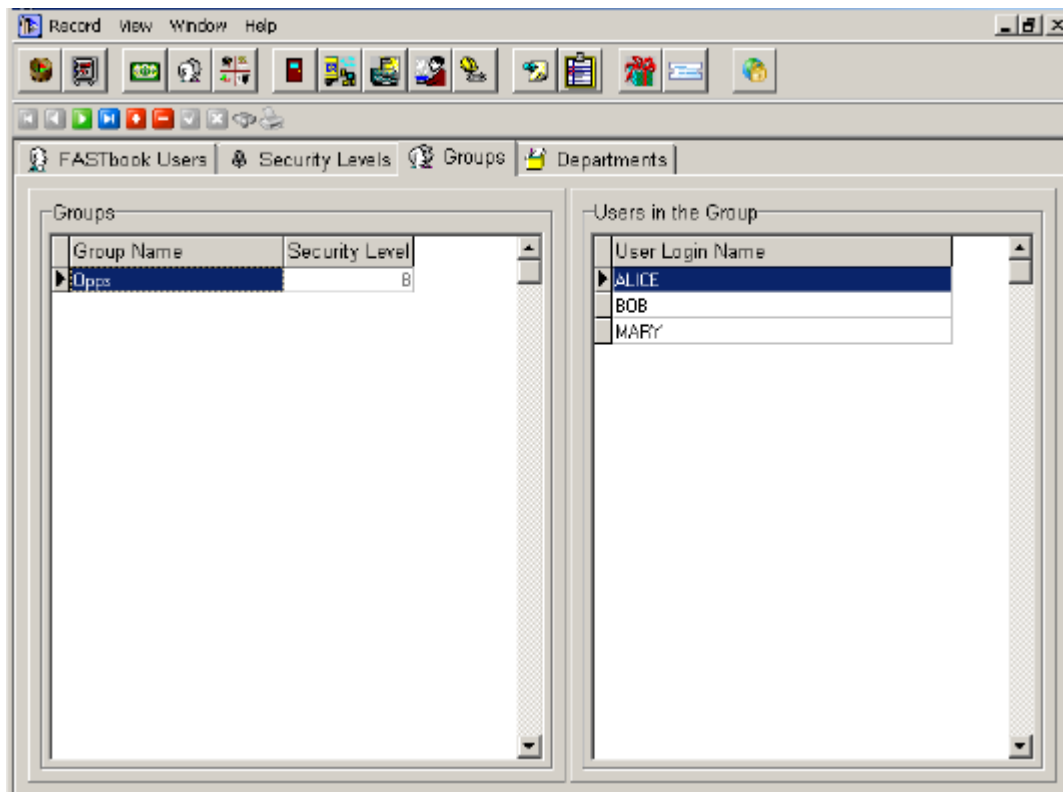
**NOTE:** You must be logged in as the Supervisor to add a new user to the security list.



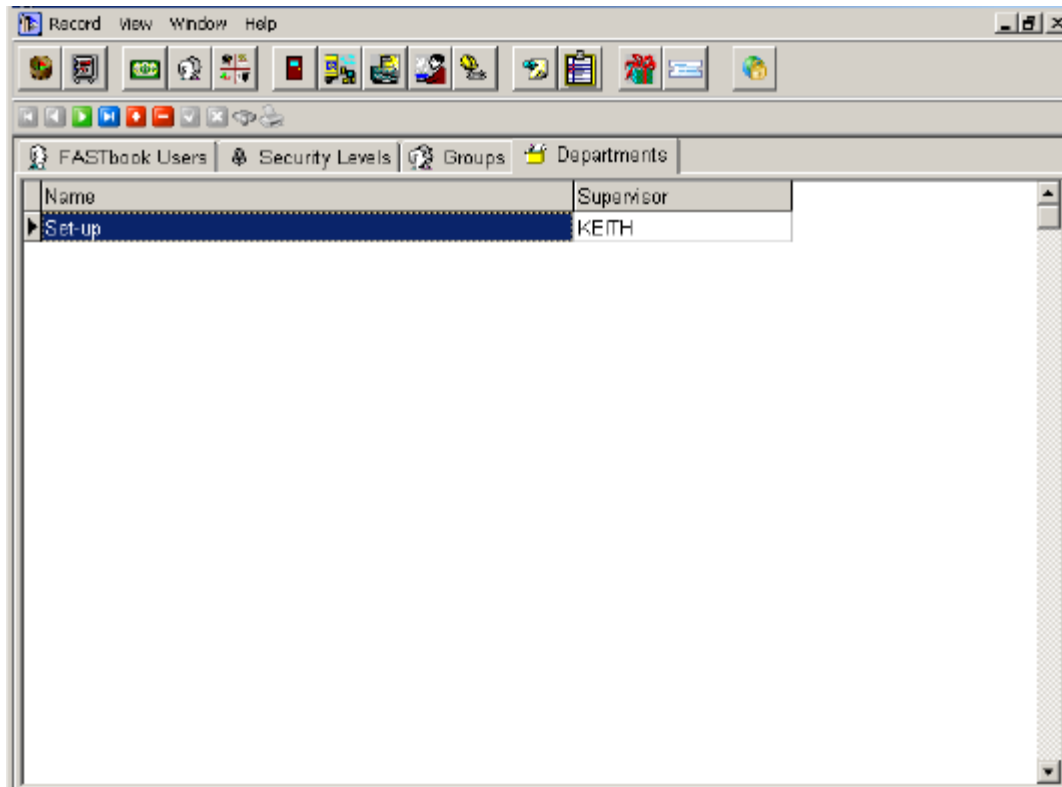


**TAB 3: Groups**

- Type in the User Group's login name. Press <TAB>. The System will spell the login name in capital letters.
- Type in the User Group's full name. Press <TAB> .
- Click on the checkbox or press the Spacebar to mark the user as a Group.
- Highlight the group to which you want to assign users by clicking with the mouse on the name.
- Type in the User Group's login name. Press <TAB>. The System will spell the login name in capital letters.
- Type in the User Group's full name. Press <TAB> .
- Click on the checkbox or press the Spacebar to mark the user as a Group.
- Highlight the group to which you want to assign users by clicking with the mouse on the name.
- Click on the ZOOM button.
- A secondary screen will pop up that contains the Full Name of the group you highlighted.
- Click on the down arrow in the table.
- Assign the users you want to be part of the group by selecting them from the drop-down list and pressing <TAB> after each selection.
- Press the OK button to accept your entries and exit the secondary window.
- Click on the INSERT button or use the down arrow key to add an empty line into the table and get ready to set up a Security Level for a different Location.



- Double-click on the System-Menu-Icon or choose Close from the menu that drops down if you click on the System-Menu-Icon once to exit Security.



#### 4.4.1 TAB 1: Entering Users

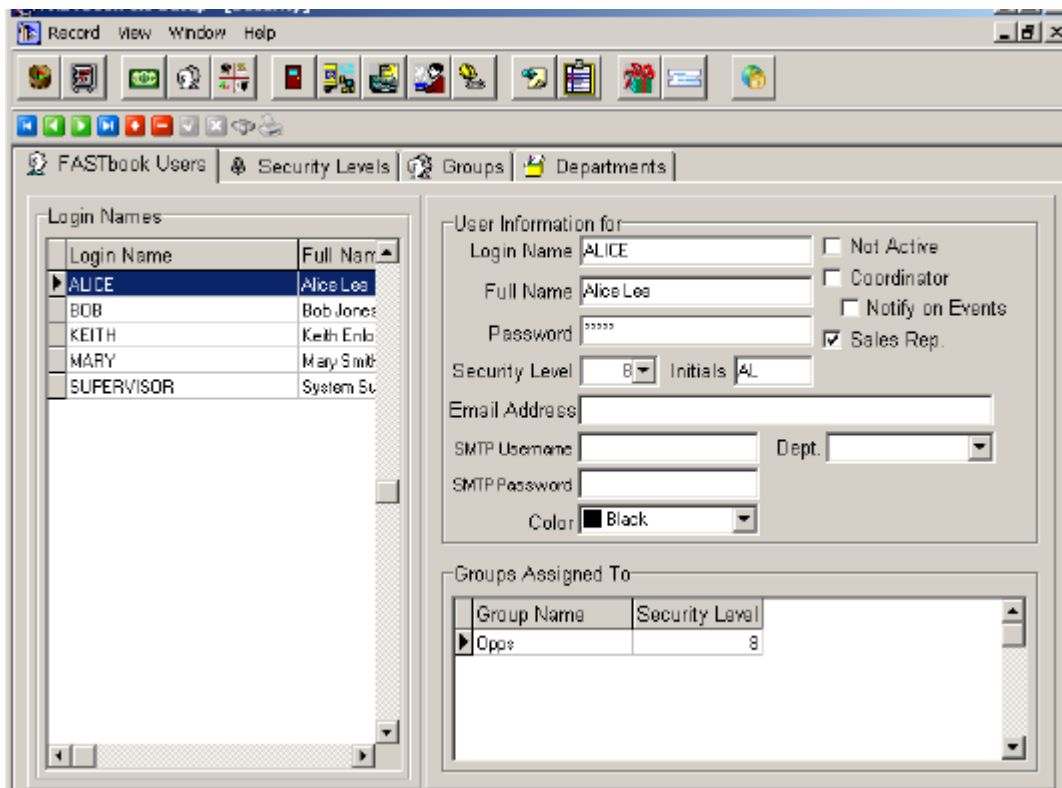
##### Entering Users

- ◆ Use your mouse to click on the 'User Accounts and Security' button in the toolbox
- ◆ The FASTbook Users window opens.

##### 4.4.1.1 If setting up Single User

##### If setting up a single User:

- ◆ Click on the INSERT button to add a new line.
- ◆ Type in the user's login name on the right side of the screen. Press <TAB>. The System will spell the login name in capital letters on the left side of the screen. This entry will identify the login name for Tickler Notification.
- ◆ Type in the user's full name. Press <TAB>.
- ◆ Enter the Password. Press <TAB>.



- ◆ Type the user's Security Level. The Security Level was previously defined in Security Levels TAB. Press <TAB>.
- ◆ Enter the User's Initials. Press <TAB>.

#### 4.4.1.2 Not Active

##### Not Active



**NOTE:** To remove users from list, check "Not Active". They will still appear in setup but not in the rest of FASTbook.

#### 4.4.1.3 Use Net Login Name

##### Use Net Login Name

Turning this Check box ON keeps the Login ID assigned by your network so you can enter the one you setup in **FASTbook**.

#### 4.4.1.4 Coordinator

##### Coordinator

Turning this Check box ON allows you to assign users to the Coordinator drop down box in event data.

#### 4.4.1.5 Sales Representative

##### **Sales Representative**

Turning this Check box ON allows you to assign users to the Sales Rep. drop down box in event data.

#### 4.4.1.6 User E-Mail Address

##### **User E-Mail Address**

Enter the Users SMTP Username and SMTP Password . The SMTP Username specifies your account name. This is usually the same as the part of your e-mail address to the left of the at(@) sign.

The SMTP Password specifies your user password, normally your server password.

#### 4.4.1.7 Changing User Password

##### **For Users Who Wish To**

- ◆ If you wish to change your security password, you must have access to setup and the security module.
- ◆ Highlight your name (it will be the only one that you can view) and click into the existing password.
- ◆ Type your new password in the highlighted field.
- ◆ Click on the green check to save the change.

#### 4.4.2 TAB 2: Security Levels

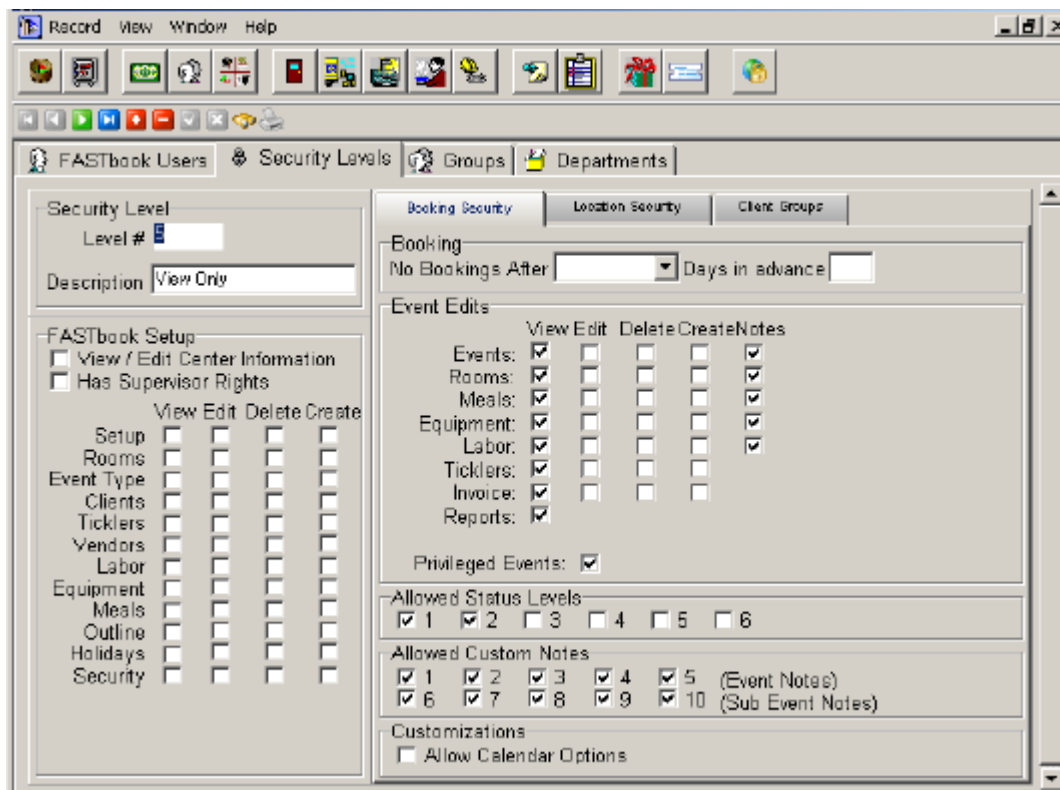
##### **TAB 2: Security Levels**

In the security Set-Up you can define security levels.

Type in the User Group's login name. Press <TAB>. The System will spell the login name in capital letters.

##### **Entering Security Levels**

- ◆ Click on the  button in the Setup Menu Bar then click on the Security Levels TAB.



- ◆ The entry form changes to the Security screen.
- ◆ Click on the INSERT button to clear the screen.
- ◆ In the first section you are able to name the security level.
- ◆ Type in a Number for the level you want to create and press <TAB>.
- ◆ Type in the Description for that level and press <TAB>.

The Meaning of the Security Level Terms:

**USE:** This Security Level can access the modules, but if nothing else is selected it is merely a permission to view.

In order to have Edit, Delete, and Create rights, the Use must be ON.

**EDIT:** This Security Level can access modules and make changes to existing records, but cannot Delete records from the database. It will also prevent Creating of new records.

**DELETE:** This Security Level can access the module and delete items from the indicated database. It has no permission to Edit existing records or Create new ones.

**ADD:** This Security Level can access the module item and create a new record in the indicated database, but cannot Edit or Delete existing records.

In the second Section you are able to define how '**Setup**' is handled.

- ◆ Click on the first Check box called 'Use Set Up', if the level you are defining should be able to work in the Set Up modules.
- ◆ By clicking on this Check box, all Check boxes for Set up will be switched to the ON position.

- ◆ If you want the level to only use the Set Up module, but not Edit, Add, or Delete in it, click on the Check boxes in the Set Up row that are located below the Edit, Delete, and Add Columns.
- ◆ All Check boxes will be turned OFF again except the first column.
- ◆ If you want the level to only create within the Set Up module, but not Edit or Delete, click on the check boxes in the Set Up row that are located below the Edit and Delete columns.
- ◆ All check boxes in the Edit and Delete columns will be turned OFF.
- ◆ Indicate which databases the level you are setting up will be able to use, which ones they can Edit, which ones they can Delete from, or Create in by clicking on the appropriate Check box

In the third Section you are able to define how '**Booking**' is handled.

- ◆ Click on the first Check box called 'Use Booking' if the level you are defining should be able to work in the Booking and Report modules.
- ◆ Indicate in what way the person assigned to the level you are setting up will be able to use Booking by clicking on the appropriate Check boxes.
- ◆ If you want to set a time limit on bookings you have two options. You can enter the End Date (like 03/07/04) into the 'Book Rooms until' field, or type in the number of 'Days in advance' (like 90).

**FASTbook** would disallow any bookings after March 7, 2004, or beyond 90 days.

In the fourth Section you are able to define how '**Resources**' are handled.

- ◆ Click on the first Check box called 'Use Rooms' if the level you are defining should be able to Edit, Delete, or Create records in the Sub-event Rooms module.
- ◆ Click on the second Check box called 'Use Meals' if the level you are defining should be able to Edit, Delete, or Create records in the Sub-event Meals module.
- ◆ Click on the first Check box called 'Use Equipment' if the level you are defining should be able to Edit, Delete, or Create records in the Sub-event Equipment module.
- ◆ Click on the first Check box called 'Use Labor' if the level you are defining should be able to Edit, Delete, or Create records in the Sub-event Labor module.

In the fifth section you are able to define whether or not you want the level to use the 'Allowed Custom Notes'.



**NOTE:** You may want to setup User Definable TAB first, before setting up the fifth section.

- ◆ Define whether or not you want the level to 'Use Reports'.

In the sixth section you are able to define whether or not you want the level to use the "invoice/financial" information.

In the seventh section you are able to set up status priorities for the security level.

- ◆ Click on the first check box if you want the user to book firm events, with a **Priority 1**.

- ◆ Click on the second check box if you want the user to book tentative events, with a **Priority 2**.
- ◆ Click on the third check box if you want the user to book tentative events, with a **Priority 3**.
- ◆ Mark all six Check boxes if you want the person assigned to the security level you are setting up to book any event regardless of status.

Different Event Statuses can be setup in the Center Profile module on the last TAB called 'Status'.

- ◆ Click on the SAVE button to save your entries.
- ◆ Click on the INSERT button to clear the screen and get ready for the next entry.



**NOTE:** You must be logged in as the Supervisor to add a new user to the security list.

### 4.4.3 TAB 3: User Groups

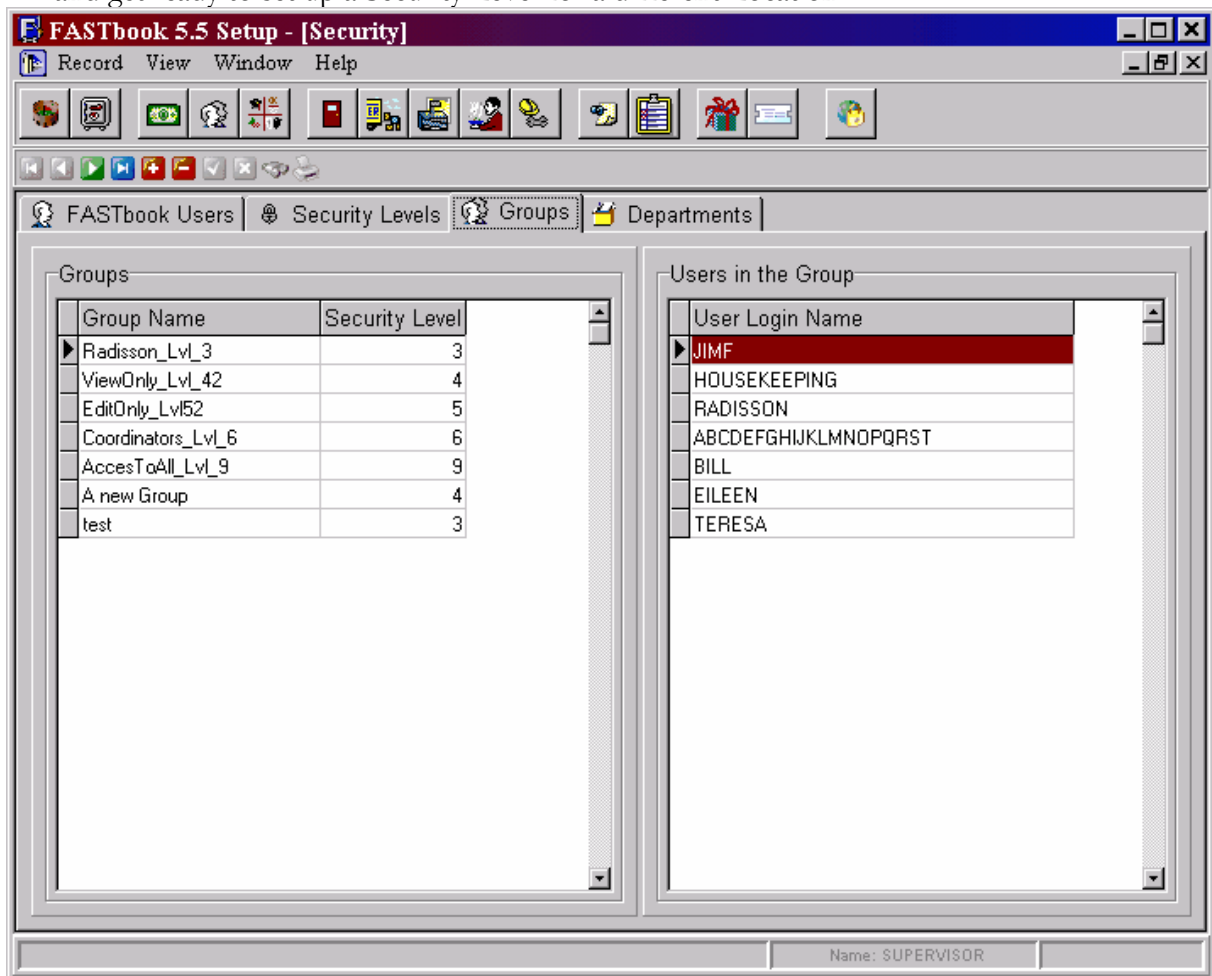
#### TAB 3: Groups

- ◆ Type in the User Group's login name. Press <TAB>. The System will spell the login name in capital letters.
- ◆ Type in the User Group's full name. Press <TAB> .
- ◆ Click on the check box or press the Space bar to mark the user as a Group.
- ◆ Highlight the group to which you want to assign users by clicking with the mouse on the name.
- ◆ Type in the User Group's login name. Press <TAB>. The System will spell the login name in capital letters.
- ◆ Type in the User Group's full name. Press <TAB> .
- ◆ Click on the check box or press the Space bar to mark the user as a Group.
- ◆ Highlight the group to which you want to assign users by clicking with the mouse on the name.
- ◆ Click on the ZOOM button.

A secondary screen will pop up that contains the Full Name of the group you highlighted.

- ◆ Click on the down arrow in the table.
- ◆ Assign the users you want to be part of the group by selecting them from the drop-down list and pressing <TAB> after each selection.
- ◆ Press the OK button to accept your entries and exit the secondary window.

- ◆ Click on the INSERT button or use the down arrow key to add an empty line into the table and get ready to set up a Security Level for a different Location.



Double-click on the System-Menu-Icon or choose Close from the menu that drops down if you click on the System-Menu-Icon once to exit Security.

## 4.5 Client Categories



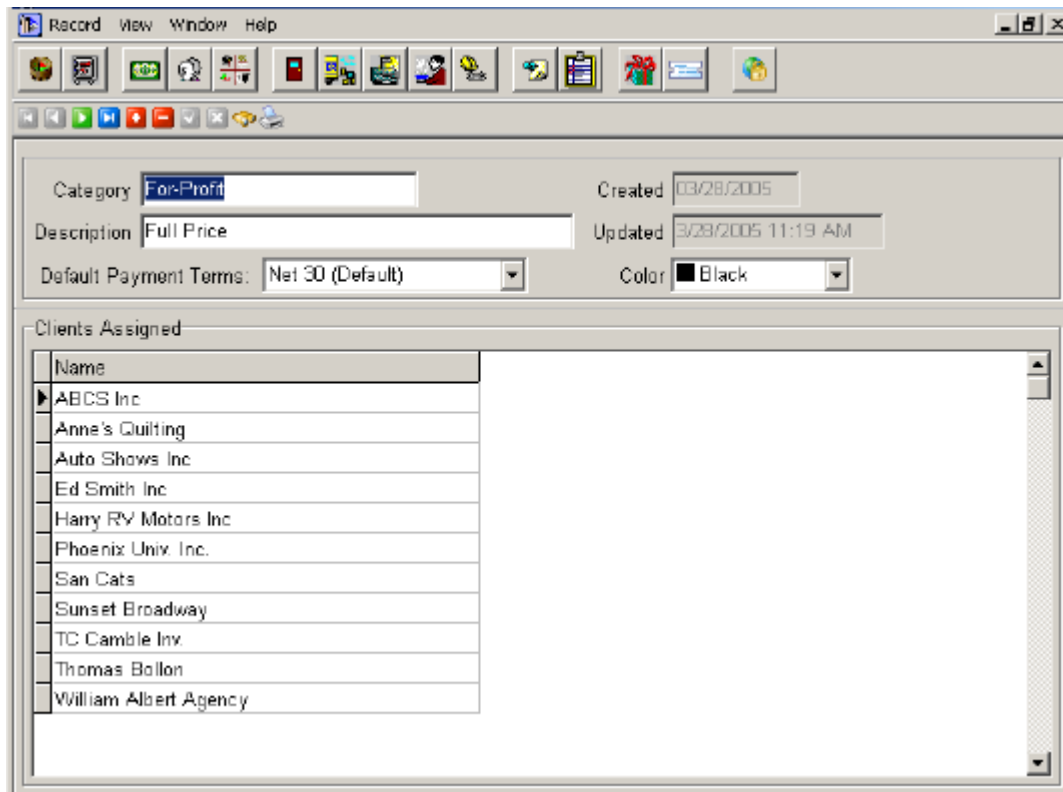
### Client Categories

The Client Categories database enables you to set up the different Client Categories that apply to your clients. Once a Client Category is assigned to a client, **FASTbook** uses it to automatically charge a previously specified rate for Rooms, Equipment, Labor, and Meals.



**NOTE:** If you don't use different Client Categories, you need to enter at least one category that could be called 'standard' or 'regular', this is the basic rate you are charging to each client.





### Entering Client Categories

- From the View Pull-Down Menu in the Action bar, pick Client Categories by clicking on it or use your mouse to click on the Client Categories button in the toolbar.
- The Client Categories window opens.
- Click on the INSERT button to add a new line.
- Type in the Description for a category and click on the SAVE button to save your new record.
- **FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.
- Click on the INSERT button to add a new line and get ready for the next entry.
- Click on the Post Edit button to save the last entry before exiting.

## 4.5.1 Entering Client Categories

### Entering Client Categories

From the View Pull-Down Menu in the Action bar, pick Client Categories by clicking on it or use your mouse to click on the Client Categories button in the toolbar.

The Client Categories window opens.

Click on the INSERT button to add a new line.

Type in the Description for a category and click on the SAVE button to save your new record. **FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

Click on the INSERT button to add a new line and get ready for the next entry.

Click on the Post Edit button to save last entry before exiting.

**FASTbook 5.5 Setup - [Client Categories]**

Record View Window Help

Category: Standard Created: 05/29/1997

Description: Standard Clients Updated: 9/12/2005 3:10 PM

Default Payment Terms: Net 30 Color: Blue

Clients Assigned

Name
▶ A G Edwards
A M G E N A M I
A P I O
A.i.s.
ABCS Inc
All Thats Natural
Allstate
Alter, Vivian
Alvarado/olson Reception
Am Contract Bridge League
Anthony & Assoc - Health Fair
Anthony & Assoc - Kids Fair
Asian Am Cultural Club

Name: SUPERVISOR Users In: 0

## 4.6 Clients

### Clients

The Clients database allows you to enter personal information about each one of your customers, whether they are making a reservation or conducting other business at your center. Client information can be added from Fastbooking, Event Detail or the Contact Management area of Fastbook.

FASTbook 5.5 Setup - [Clients]

Record View Window Help

Client Information

Name: Mesa Ballet Category: Non-Profit  Inactive  Taxable

Flag w/ Message Created: 03/28/2005 Updated: 03/28/2005 11:58:0 Payment Terms: Net 30 (Default)

Address

Address 1: 768 Long Lane City: Mesa Country: Phone: 480 000 1234

Address 2: State/Province: AZ Fax: 480 000 1235

Address 3: Zip/Postal: 85111

Contacts (1) | Notes | Client Group Association | Bill To | Comments | Custom

Contact Name	Title	Presenter	Priority	Phone	Ext.	Phone 2	Fa
Julie Down		<input type="checkbox"/>	1	234 123 1234			00

Name: SUPERVISOR Users In: 0

### Entering Clients

- From the View Pull-Down Menu in the Action bar, pick Clients by clicking on it or use your mouse to click on the Client button in the toolbar.
- The Client window opens.
- Click on the INSERT button to clear the screen.
- Type in the Name of the client and press <TAB>.
- Enter Address 1, Address 2, and Address 3 (if applicable). Press <TAB> after each entry.
- Enter the City, State, Zip, and Country for the client. Press <TAB> after each entry.
- Pick a Billing Category from the combo list that applies to this client. Press <TAB>.
- **FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.
- Enter the first Client Contact Name into the Contact Name column. Press <TAB>.
- Enter the person's Title. Press <TAB>.
- Check the Presenter check box only if you need to identify a presenter, promoter, VIP, or other identifier. This will allow you to do a sort or filter by this contact identifier.
- Enter the person's Priority. Press <TAB>.
- Enter the Phone Number for the Contact Person. Press <TAB>.

- Enter the Phone Extension. Press <TAB>.
- Enter the FAX number. Press <TAB>.
- The City, State, and Zip Code are defaulted from the upper part of the client's screen.
- If the Contact person has a different address than the one defaulted, simply type in the appropriate City, State, and Zip. Press <TAB> after each entry.



**Note:** To send clients e-mails from FASTbook, you must enter the contact's e-mail address.

- Press INSERT to enter the next person into the Contacts table if you are not on a blank line.
- Press <ENTER> to get out of the table, back into the Client Name field.
- Click on the INSERT button to clear the screen and enter the next Client.
- To view all records in the Client Database, click on binoculars on the Tool Bar.
- After selecting the Client you wish to review, click on the 'ok' button to go back to Client Information.

#### **Entering Client Notes**

- Click on the Notes tab next to the Contact tab on the Editing Client screen.
- Click on the insert/add record (+) button. FASTbook will time stamp and add your user name to the record.
- Next, select the contact if needed.
- Then add your note and save when completed.

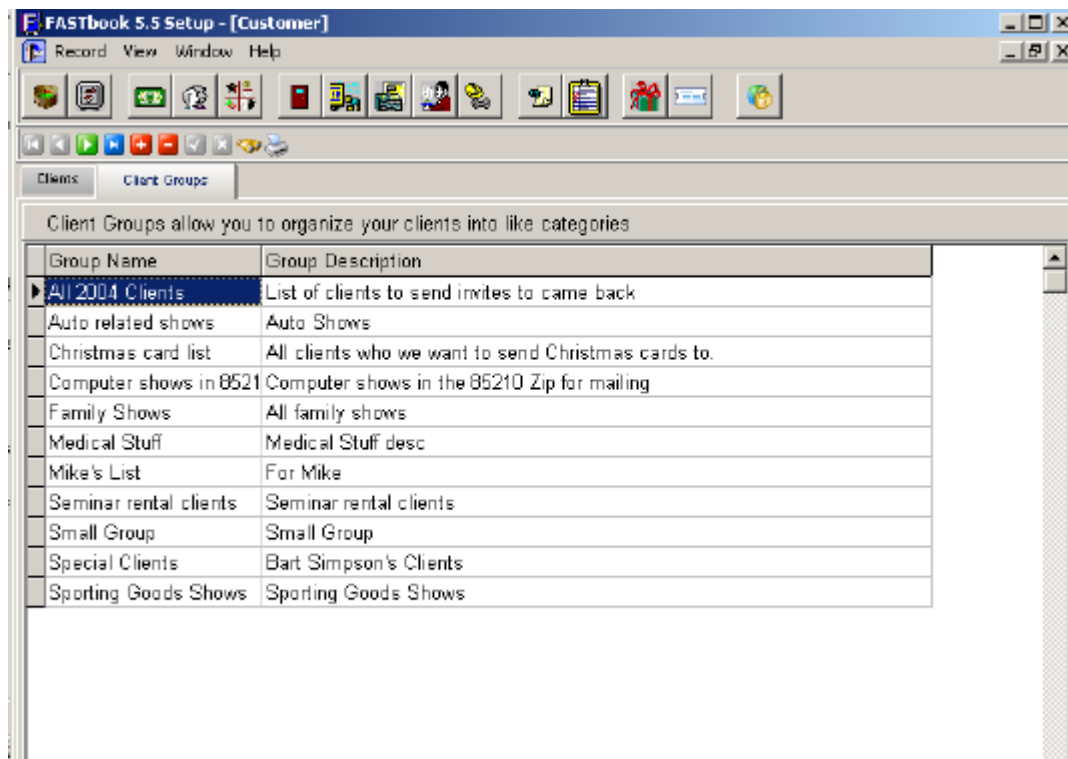
### **4.6.1 Entering Clients Notes**

#### **Entering Client Notes**

- ◆ Click on the Notes tab next to the Contact tab on the Editing Client screen.
- ◆ Click on the insert/add record (+) button. FASTbook will time stamp and add your user name to the record.
- ◆ Next select the contact if needed.
- ◆ Then add your note and save when completed.

### **4.6.2 Client Groups**

The Clients Group database allows you to set up groups of Clients for special reporting or for mailings. After naming your groups proceed to Client information to add your clients to the various groups. You can add a client to a group from Fastbooking, Event Detail, or the Contact Management area of Fastbook.



### Entering Client Groups

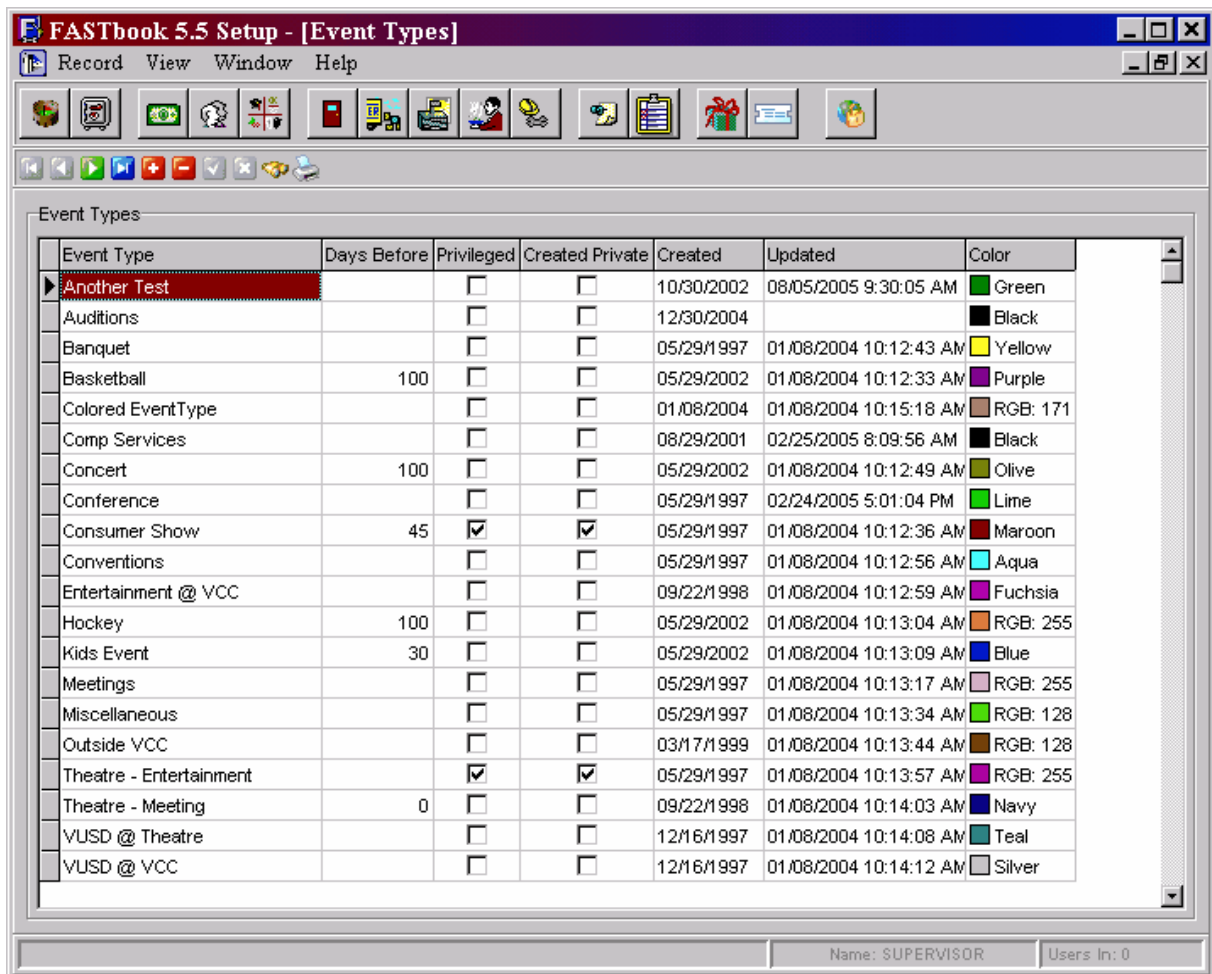
- From the View Pull-Down Menu in the Action bar, pick Client by clicking on it, or use your mouse to click on the Client button in the toolbar.
- The Client/Client Group window opens.
- Click on the Groups, then the INSERT button to add a new line.
- Type in the Description for Group and click on the SAVE button to save your new record.
- **FASTbook** will now stamp this record with the date and time created and update it for easy tracking and later reference.
- Click on the INSERT button to add a new line and get ready for the next entry.
- Click on the Post Edit button to save the last entry before exiting.

## 4.7 Event Types



### Event Types

Event Types classify the nature of the event your facility is hosting. They are used throughout the system to identify the Event and Subevent, and can be an extremely useful function. The usage of Event Type readily identifies what type of event or subevent you are dealing with when looking at screens or reports. Event Types is also very helpful when generating statistical information for management and sales reports. Event Types are: Banquet, Conference, Meeting, Convention, Antique Show, etc...



- From the View Pull-Down Menu in the Action bar, pick Event Types by clicking on it or use your mouse to click on the Event Types button in the toolbar.
- The Event Types window opens.
- Click on the INSERT button to clear the screen.
- Type in the Description for an Event Type and click on the Post Edit button to save the record.

You have the option to determine whether or not to allow a certain number of days between booking the same Event Type.

**Example:** An antique show is booked for the first week in March. You have to decide if you want to have a different antique show in your center during the second week in March or if you want to wait at least 30 days until you allow the booking of an antique show again.

If you want **FASTbook** to check if the Event Type has been recently used, press <TAB>.

- Enter the # of Days you want to pass before booking the same Event Type again. Press <TAB>.

### Entering Privileged Event Types

**Purpose:** To provide a new Security level option that will allow a FASTbook User to setup User Level Security so that a group (i.e., Security Level) of FASTbook Users can be highly restricted from being able to view any event detail information that might provide the

**restricted group of FASTbook Users knowledge about the type or nature of certain events.**

- Check all Event Types that you wish to have restricted from the view some of your security levels. Example: You want to restrict the view of concert information to some of your users.
- Click Privileged on all Event Types that you want to keep users from viewing. What the unprivileged viewers will see is event type displayed in.

**Entering Private Event Types**

**Purpose:** To provide an option that will allow the Event Name, and Client Name and Client Contact Name of an Event to remain hidden from all FASTbook Users other than the Supervisor and/or the FASTbook User who created the Event.

- Check all Event Types that you wish to have restricted from the view of some of your security levels. Example: You want to restrict the view of concert information to some of your users.
- Click Privileged on all Event Types that you want to keep users from viewing. What the unprivileged viewers will see is event type displayed in.
- Press the SAVE button to save the record.

FASTbook will now stamp this record with the date and time created and updated for easy tracking and later reference.

- Click on the INSERT button to clear the screen and enter the next Event Type.
- Click on the Post Edit button to save last entry before exiting.

### 4.7.1 Entering Privileged Event Types

**Entering Privileged Event Types**

Purpose: To provide a new Security level option that will allow a FASTbook User to setup User Level Security so that a group (i.e., Security Level) of FASTbook Users can be highly restricted from being able to view any event detail information that might provide the restricted group of FASTbook Users knowledge about the type or nature of certain events.

- ◆ Check all Event Types that you wish to have restricted from the view some of your security levels. Example: You want to restrict the view of concert information to some of your users.
- ◆ Click Privileged on all Event Types that you want to keep users from viewing. What the unprivileged viewers will see is event type displayed in.

### 4.7.2 Entering Private Event Types

**Entering Private Event Types**

Purpose: To provide an option that will allow the Event Name, Client Name, and Client Contact Name of an Event to remain hidden from all FASTbook Users other than the Supervisor and/or the FASTbook User who created the Event.

- ◆ Check all Event Types that you wish to have restricted from the view of some of your

security levels. Example: You want to restrict the view of concert information to some of your users.

- ◆ Click Privileged on all Event Types that you want to keep users from viewing. What the unprivileged viewers will see is event type displayed in.
  - ◆ Press the SAVE button to save the record.
- FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.
- ◆ Click on the INSERT button to clear the screen and enter the next Event Type.
  - ◆ Click on the Post Edit button to save last entry before exiting.

## 4.8 Rooms



**NOTE:** The Rooms setup window consists of three pages: The ROOM setup, the ROOM STYLE setup, and the ROOMS RATES setup window. The TABS on the bottom of the window allow for easy swapping between pages. Because the TAB for the page you are working on is always highlighted in the screen color, there will never be a doubt about what page you are working on.



Room Description

Name: Ballroom A  
Created: 05/28/2005  
Updated: 01/23/2005 1:25 PM

ROOM  GROUP

Dimensions

L: [ ] W: [ ] H: [ ]  
Total Floor Area: [ ]  
Max Allowable Occupancy: [ ]  
Location: Cactus Convention Ctr.

Attributes

Calendar Options

Room Attributes

Floor jacks every 20ft, phone and WIFI

Information

Accounting Code: [ ]

Shared Room  
 Video Conferencing

Access Times

Start: [ ] End: [ ]  
 Out Of Service

Styles/Capacity (6)

Style Name	Capacity
Banquet	275
Conference	275
Exhibits	234
Rounds	275
Theater	275
LLShape	275

Rooms in the Group (0)

Room Name: [ ]

Multi Assign

Coordinator: [ ]  Notify on new bookings

**TAB 1: Rooms and Groups of Rooms**

The Rooms database allows you to enter all rooms within your facility, including room dimensions and layout details.

The Rooms database also allows you to combine several rooms that are already defined. These Room Groups can then be scheduled as one unit to eliminate the need to schedule every single room that is needed when making a reservation. Each Group can contain an unlimited number of Rooms.

### Entering Rooms

Style Name	Capacity
Banquet	275
Conference	275
Exhibits	234
Rounds	275
Theater	275
U-Shape	275

Click on the Rooms TAB on the top of the Rooms window.

The entry form changes to the Rooms screen.

Click on the INSERT button to clear the screen.

Type in the Room Name and press <TAB>.

Click on the ROOM radio button to define that you are setting up a room and press <TAB>.

Enter optional Dimensions, Square Footage, Max Capacity and Access Times and press <TAB>.

If you have multiple sites, pick the Location of the room from the pre- defined list and press <TAB>.

Enter optional Room Attributes. Example: Room has built in screen and overhead projector, Computer outlets 10 each, Balcony over looking city.

- Click on the checkbox to define if the room is a SHARED ROOM.



**NOTE:** By allowing the room to be shared by several events, you are able to double-book it for the same time frame. If the checkbox has an 'X' in it, then **FASTbook** does not check for booking conflicts. The SHARED ROOM feature is included to allow double booking of rooms such as foyers and eating establishments.

- Assign an Accounting Code (if applicable). Press <TAB>.

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- Choose Layout Styles from the predefined list by clicking on the Multi Select button at the bottom of the Style/Capacity column.
- Hold the control key down and select the room styles by clicking on each style that the room supports.

- Enter default capacity (if applicable). Press <OK>.
- Type in the total allowable Capacity for each particular Layout Style that is different than the default that you selected in Multi Select.
- To exit the table press the Post Edit button.
- Click on the Insert button to clear the screen and get ready for the next entry.



**NOTE:** Out of Service for a room: **FASTbook** allows you to take a room out of service for any reason. Example: When a room needs repair, you can come to setup, select the room you want to put out of service, click on the Out of Service Checkbox, and enter the start and end date that the room will be out of service. Always check to see that the room is not already scheduled before taking it out of service.

- Click on the Post Edit button to save last entry before exiting.

### Entering Groups Of Rooms

- Click on the Rooms TAB on the bottom of the Rooms window. The entry form changes to the Rooms screen.

Style Name	Capacity
Banquet	275
Conference	275
Exhibits	254
Rounds	275
Theater	275
U-Shape	275

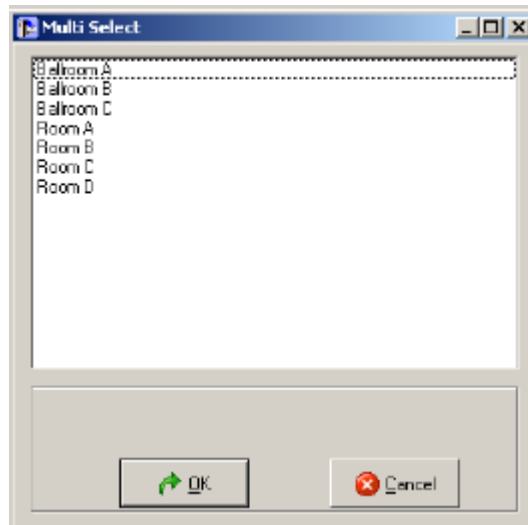
- Click on the INSERT button to clear the screen
- Type in the Room Group Name and press <TAB>.
- If your center has multiple sites, pick the Location of the group of rooms from the previously defined list.
- Click on the GROUP radio button to define that you are setting up a group.

- Enter the Length, Width, and Height of the group of rooms (if applicable).
- Press <TAB> after each entry.
- The earliest time the room group can be accessed is displayed if the rooms used for the group had Access Times attached.
- Assign an Accounting Code (if applicable). Press <TAB>.
- **FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

The screenshot shows the 'Rooms / Groups' form in the FASTbook application. The form is organized into several panels:

- Room Description:** Name (Bedroom A-B-C), Created (05/16/2005), Updated.
- Dimensions:** L, W, H, Total Floor Area, Max. Allowable Occupancy, Location (Cactus Convention Ctr.).
- Attributes:** Room Attributes.
- Information:** Accounting Code, Video Conferencing checkbox.
- Access Times:** Start, End.
- Styles/Capacity (0):** Table with columns Style Name and Capacity, and a Multi Assign button.
- Rooms in the Group (0):** List of Room Name, Multi Assign button, Coordinator, and Notify on new bookings checkbox.

Choose a Room to be part of the group from the predefined list by clicking on the Multi Select button at the bottom of the Rooms in the Group column.



- Hold the control key down and select the rooms that you want in the group by clicking on each one



**NOTE:** Once a group is set up, the system displays the total capacities for each specific Layout Style. These capacity figures are used by **FASTbook**'s Room Search feature in the booking process.

- To change capacities, simply click on the Style Name in the Styles/ Capacities section and press <TAB> to highlight the Capacity.
- Type in the new capacity and click on the SAVE button to save the change.
- Click on the INSERT button to clear the screen and get ready for the next entry.
- Click on the Post Edit button to save the last entry before exiting.

#### **Entering Calendar Options for Rooms**

The screenshot shows the 'Room Styles' tab in the FASTbook application. The window title is 'Record View Window Help'. The interface is divided into several sections:

- Room Description:** Name: Ballroom A-B-C, Created: 05/16/2005, Updated: 05/16/2005 4:11:59 PM. Radio buttons for ROOM and GROUP are present.
- Dimensions:** L, W, H input fields; Total Floor Area; Max Allowable Occupancy; Location: Cactus Convention Ctr.
- Attributes / Calendar Options:**  Show Room On Calendar; Room Label: Ballroom A-B-C; Color: Black.
- Information:** Accounting Code;  Video Conferencing.
- Access Times:** Start and End time input fields.
- Styles/Capacity (0):** A table listing room styles and their capacities:
 

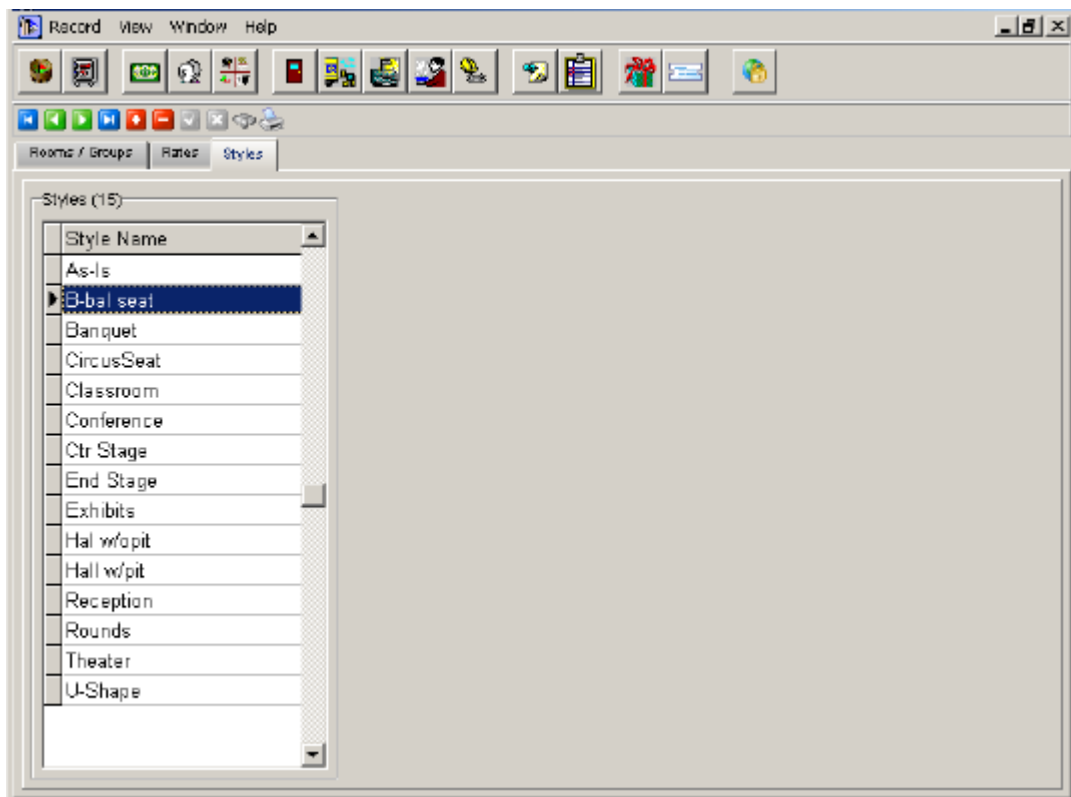
Style Name	Capacity
As-Is	744
Banquet	766
Conference	943
Exhibits	607
Reception	1090
Rounds	819
Theater	1154
U-Shape	275
- Rooms in the Group (3):** A list box containing Ballroom A, Ballroom B, and Ballroom C. A 'Multi Assign' button is below it.
- Coordinator:**  Notify on new bookings.

**TAB 2: Room Styles**

Room Styles categorizes the possible seating and equipment configurations available for each room within your center.

### Entering Room Styles

- Click on the Styles TAB on the bottom of the Rooms window. The entry form changes to the Room Styles screen.



- Click on the INSERT button to insert a new line into the table.
- Type in the Description for a style and click on the SAVE button to save your new record. **FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.
- Click on the INSERT button to insert the next blank line into the table.
- Click on the Post Edit button to save the last entry before exiting.

### TAB 3: Room Rates

The Room Rates database enables you to set up all applicable rates you commonly charge for the use of your facility.

**FASTbook** allows for three different ways to set up rates:

#### 1: Set up rates using predefined codes

- If the Code is setup as '**Daily Rate only**', the client will be charged the same amount no matter how many hours the room is booked during a day.
- If the code is setup as '**Hourly & Daily Rate**', the client will be charged the hourly rate for eight hours (or how many hours are setup before the daily rate is used), and then **FASTbook** will start charging the Daily Rate.
- If the Code is setup as '**Hourly Rate Only**', the client will be charged the same amount for each hour the room is in use.
- If the Code is setup as 'N/A (Does Not Apply)', the client will not be charged.

#### 2: Set up a rate using first and second hour rate

#### 3. Set up a rate using a minimum charge or a percentage of the fee charged at the gate.



**NOTE:** To set up a Room Rate, you have to choose one of the 3 options. The two remaining ones will be disabled as soon as you start entering data. If you change your mind and decide to setup the rate using another option, you have to delete the rates you entered. To deactivate the rate you had setup using the codes; choose "N/A (Does Not Apply)". The amounts will default to 'Zero'. Use your tab keys to move to the rate option group panel you want to use.

CODE	HOURLY	DAILY
Weekday	\$225.00	\$1,650.00
Weekend	\$225.00	\$1,650.00
Holiday	\$225.00	\$1,650.00

### Entering Room Rates

- From the View Pull-Down Menu in the Action bar, pick Rooms by clicking on it or use your mouse to click on the Rooms button in the toolbar.
- The Rooms window opens with the page for Room Rates active.
- Click on the INSERT button to clear the screen.
- Type in a Description for the rate you want to setup and press <TAB> to advance to the next field.
- Enter the year during which the rate will apply (if applicable). Press <TAB>.
- Type in the markup that will apply for the following years either in a percentage rate or in a flat amount (if applicable). Use whole numbers like 1, 5, or 20. Press <TAB>.
- Pick an option from the previously defined Billing Category table (if applicable). Press <TAB>.

### If selecting the rate type Hourly & Daily (Option 1).

- Select a Code that identifies which rate (Daily, Hourly, Hourly & Daily, Daily or N/A) applies to Weekdays by clicking on the combo box and selecting a code. Press <TAB>.



- Repeat the above steps for both Weekends and Holidays.



**NOTE:** If you leave one of the three categories empty, (i.e. Holidays), the room charge on a Holiday will default to the previous level, either the weekend rate, or if that is not specified either, to the weekday rate.

- Enter the number of hours to pass before you want to start charging the daily rate.



**NOTE:** The number listed here is the number of hours that **FASTbook** will bill an hourly rate for a room before it switches over to the daily rate. If you do not enter a number in the field, **FASTbook** will always use the daily rate.



**NOTE:** Every 45 minutes **FASTbook** starts charging the full hour rate. If an event starts at 8:00 and ends at 9:45, **FASTbook** will charge for 2 hours.

- Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- Click on the INSERT button to clear the screen and get ready for the next entry.

**If selecting the rate type First and Second Hour option (Option 2).**

- Click with the mouse in the first field in the First and Second Hour rate section and enter the First Hourly Rate. Press <TAB>.
- Enter the Second Hourly Rate. Press <TAB>.
- Enter the # of Hours before **FASTbook** starts charging the Second Rate.

**Example:** The first hourly rate is \$100, the second hourly rate is \$ 50, the hours before using the second rate are set up for 3. **FASTbook** will charge \$100 per hour if an event is three hours or shorter. If the event takes place for more than 3 hours and 45 minutes, **FASTbook** starts charging the second hourly rate.

- Click on the checkbox if you want to add 1 & 2-hour rate together for the second hourly rate.
- Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- Click on the INSERT button to clear the screen and get ready for the next entry.

**If selecting the rate type Percentage from Charges at the Gate (Option 3).**

- Click with the mouse in the first field in the Percentage Rate section to enter the Minimum Rate you will charge. Press <TAB>.

Enter a percentage amount from the Gate charge. (Optional). Press <TAB>.

Enter the Maximum Rate you will charge.

- Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and update it for easy tracking and later reference.

- Click on the INSERT button to clear the screen and get ready for the next entry.

### If selecting the rate type Square Foot option (Option 4).

- Click with the mouse in the first field in the Square Foot section to enter the Minimum Rate you will charge. Press <TAB>.
- Enter cost per square foot. Press <TAB>.
- Enter the Maximum Rate you will charge.
- Click on the SAVE button to save your new record.

FASTbook will now stamp this record with the date and time created and update it for easy tracking and later reference.

## 4.8.1 TAB 1: Rooms and Group of Rooms

### TAB 1: Rooms and Groups of Rooms

The Rooms database allows you to enter all rooms within your facility, including room dimensions and layout details.

The Rooms database also allows you to combine several rooms that are already defined. These Room Groups can then be scheduled as one unit to eliminate the need to schedule every single room that is needed when making a reservation. Each Group can contain an unlimited number of Rooms.

### 4.8.1.1 Entering Rooms

#### Entering Rooms

Style Name	Capacity
Banquet	275
Conference	275
Exhibits	234
Rounds	275
Theater	275
LLShape	275

Click on the Rooms TAB on the bottom of the Rooms window.  
The entry form changes to the Rooms screen.

Click on the INSERT button to clear the screen.

Type in the Room Name and press <TAB>.

Click on the ROOM radio button to define that you are setting up a room and press <TAB>.

Enter optional Dimensions, Square Footage, Max Capacity and Access Times and press <TAB>.

If you have multiple sites, pick the Location of the room from the pre-defined list and press <TAB>.

Enter optional Room Attributes. Example: Room has built in screen and overhead projector, Computer outlets 10 each, Balcony overlooking city.

- ◆ Click on the check box to define if the room is a SHARED ROOM.



**NOTE:** By allowing the room to be shared by several events, you are able to double-book it for the same time frame. If the check box has an 'X' in it, then **FASTbook** does not check for booking conflicts. The SHARED ROOM feature is included to allow double booking of rooms such as foyers and eating establishments.

- ◆ Assign an Accounting Code (if applicable). Press <TAB>.

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- ◆ Choose Layout Styles from the predefined list by clicking on the Multi Select button at the bottom of the Style/Capacity column.
- ◆ Hold the control key down and select the room styles by clicking on each style that the room supports.
- ◆ Enter default capacity (if applicable). Press <OK>.
- ◆ Type in the total allowable Capacity for each particular Layout Style that is different than the default that you selected in Multi Select.
- ◆ To exit the table press the Post Edit button.
- ◆ Click on the Insert button to clear the screen and get ready for the next entry.



**NOTE:** Out of Service for a room: **FASTbook** allows you to take a room out of service for any reason. Example: When a room needs repair, you can enter setup, select the room you want to put out of service, click on the Out of Service Check box and enter the start and end date that the room will be out of service. Always check to see that the room is not already scheduled before taking it out of service.

- ◆ Click on the Post Edit button to save last entry before exiting.

#### 4.8.1.2 Entering Groups of Rooms

##### Entering Groups Of Rooms

- ◆ Click on the Rooms TAB on the bottom of the Rooms window.
- ◆ The entry form changes to the Rooms screen.

Record View Window Help

Rooms / Groups Rates Styles

Room Description

Name: Ballroom A-B-C

Created: 05/16/2005

Updated: 05/16/2005 4:11:59 PM

ROOM  GROUP

Dimensions

L: [ ] W: [ ] H: [ ]

Total Floor Area: [ ]

Max Allowable Occupancy: [ ]

Location: Cactus Convention Ctr.

Attributes Calendar Options

Show Room On Calendar

Room Label: Ballroom A-B-C

Color: Black

Information

Accounting Code: [ ]

Video Conferencing

Access Times

Start: [ ] End: [ ]

Styles/Capacity (0)

Style Name	Capacity
As-is	744
Banquet	766
Conference	943
Exhibits	607
Reception	1050
Rounds	819
Theater	1154
U-Shape	275

Rooms in the Group (3)

Room Name

- Ballroom A
- Ballroom B
- Ballroom C

Multi Assign

Coordinator: [ ]  Notify on new bookings

- ◆ Click on the INSERT button to clear the screen
- ◆ Type in the Room Group Name and press <TAB>.
- ◆ If your center has multiple sites, pick the Location of the group of rooms from the previously defined list.
- ◆ Click on the GROUP radio button to define that you are setting up a group.
- ◆ Enter the Length, Width, and Height of the group of rooms (if applicable).
- ◆ Press <TAB> after each entry.
- ◆ The earliest time the room group can be accessed is displayed if the rooms used for the group had Access Times attached.
- ◆ Assign an Accounting Code (if applicable). Press <TAB>.
- ◆ **FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

The screenshot shows the 'Record' window with the 'Rooms / Groups' tab selected. The interface is divided into several sections:

- Room Description:** Name: Ballroom A-B-C, Created: 05/16/2005, Updated: 05/16/2005 4:11:59 PM. Radio buttons for ROOM and GROUP are present, with GROUP selected.
- Dimensions:** Fields for Length (L), Width (W), and Height (H). Total Floor Area, Max Allowable Occupancy, and Location (Cactus Convention Ctr.) are also shown.
- Attributes / Calendar Options:** A checked box for 'Show Room On Calendar', Room Label: Ballroom A-B-C, and Color: Black.
- Information:** Accounting Code field and a checkbox for 'Video Conferencing'.
- Access Times:** Start and End time fields.
- Styles/Capacity (0):** A table listing various styles and their capacities.
 

Style Name	Capacity
As-is	744
Banquet	766
Conference	943
Exhibits	607
Reception	1090
Rounds	819
Theater	1154
U-Shape	275
- Rooms in the Group (3):** A list containing Ballroom A, Ballroom B, and Ballroom C. A 'Multi Assign' button is located below the list.
- Coordinator:** A field with a 'Notify on new bookings' checkbox.

Choose a Room to be part of the group from the predefined list by clicking on the Multi Select button at the bottom of the Rooms in the Group column.

- ◆ Hold the control key down and select the rooms that you want in the group by clicking on each one



**NOTE:** Once a group is setup, the system displays the total capacities for each specific Layout Style. These capacity figures are used by **FASTbook's** Room Search feature in the booking process.

- ◆ To change capacities, simply click on the Style Name in the Styles/Capacities section and press <TAB> to highlight the Capacity.
- ◆ Type in the new capacity and click on the SAVE button to save the change.
- ◆ Click on the INSERT button to clear the screen and get ready for the next entry.
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.8.2 TAB 3: Room Rates

### TAB 3: Room Rates

The Room Rates database enables you to set up all applicable rates you commonly charge for the use of your facility.

**FASTbook** allows for three different ways to set up rates:

#### 1: Set up rates using predefined codes

- ◆ If the Code is setup as '**Daily Rate only**', the client will be charged the same amount, no matter how many hours the room is booked during a day.
- ◆ If the code is setup as '**Hourly & Daily Rate**', the client will be charged the hourly rate for eight hours (or how many hours are setup before the daily rate is used), then **FASTbook** starts charging the Daily Rate.
- ◆ If the Code is setup as '**Hourly Rate Only**', the client will be charged the same amount for each hour the room is in use.
- ◆ If the Code is setup as 'N/A (Does Not Apply)', the client will not be charged.

#### 2: Set up a rate using first and second hour rate.

#### 3. Set up a rate using a minimum charge or a percentage of the fee charged at the gate.



**NOTE:** To set up a Room Rate, you have to choose one of the 3 options. The two remaining ones will be disabled as soon as you start entering data. If you change your mind and decide to setup the rate using another option, you have to delete the rates you entered. To deactivate the rate you had setup using the codes, choose "N/A (Does Not Apply)". The

amounts will default to 'Zero'. Use your tab keys to move to the rate option group panel you want to use.

#### 4.8.2.1 Entering Room Rates

##### Entering Room Rates

The screenshot shows the 'Rates' tab in the FASTbook software. The 'Rate' section has a description of 'Balroom A, B, or C'. The 'Define Rates' section shows the year set to 2005. The 'Rate Type' section has 'Hourly & Daily' selected. The 'Hourly & Daily' section has a table with the following data:

CODE	HOURLY	DAILY
Weekday	\$225.00	\$1,650.00
Weekend	\$225.00	\$1,650.00
Holiday	\$225.00	\$1,650.00

The 'Hours for Daily' field is set to 8.

- ◆ From the View Pull-Down Menu in the Action bar, pick Rooms by clicking on it or use your mouse to click on the Rooms button in the toolbar.
- ◆ The Rooms window opens with the page for Room Rates active.
- ◆ Click on the INSERT button to clear the screen.
- ◆ Type in a Description for the rate you want to setup and press <TAB> to advance to the next field.
- ◆ Enter the year during which the rate will apply (if applicable). Press <TAB>.
- ◆ Type in the markup that will apply for the following years either in a percentage rate or in a flat amount (if applicable). Use whole numbers like 1, 5, or 20. Press <TAB>.
- ◆ Pick an option from the previously defined Billing Category table (if applicable). Press <TAB>.

**If selecting the rate type Hourly & Daily (Option 1):**

- ◆ Select a Code that identifies which rate (Daily, Hourly, Hourly & Daily, Daily or N/A) applies for Weekdays by clicking on the combo box and selecting a code. Press <TAB>.
- ◆ Repeat the above steps for both Weekends and Holidays.



**NOTE:** If you leave one of the three categories empty, (i.e. Holidays), the room charge on a Holiday will default to the previous level, either the weekend rate or if that is not specified either, to the weekday rate.

- ◆ Enter the number of hours to pass before you want to start charging the daily rate.



**NOTE:** The number listed here is the number of hours that **FASTbook** will bill an hourly rate for a room before it switches over to the daily rate. If you do not enter a number in the field, **FASTbook** will always use the daily rate.



**NOTE:** Every 45 minutes **FASTbook** starts charging the full hour rate. If an event starts at 8:00 and ends at 9:45, **FASTbook** will charge for 2 hours.

- ◆ Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- ◆ Click on the INSERT button to clear the screen and get ready for the next entry.

**If selecting the rate type First and Second Hour option (Option 2):**

- ◆ Click with the mouse in the first field in the First and Second Hour rate section and enter the First Hourly Rate. Press <TAB>.
- ◆ Enter the Second Hourly Rate. Press <TAB>.
- ◆ Enter the # of Hours before **FASTbook** starts charging the Second Rate.

**Example:** The first hourly rate is \$100, the second hourly rate is \$50, the hours before using the second rate are set up for 3. **FASTbook** will charge \$100 per hour if an event is three hours or shorter. If the event takes place for more than 3 hours and 45 minutes, **FASTbook** starts charging the second hourly rate.

- ◆ Click on the check box if you want to add 1 & 2-hour rate together for the second hourly rate.
- ◆ Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- ◆ Click on the INSERT button to clear the screen and get ready for the next entry.

**If selecting the rate type Percentage from Charges at the Gate (Option 3):**



- ◆ Click with the mouse in the first field in the Percentage Rate section to enter the Minimum Rate you will charge. Press <TAB>.
- ◆ Enter a percentage amount from the Gate charge. (Optional). Press <TAB>.
- ◆ Enter the Maximum Rate you will charge.
- ◆ Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- ◆ Click on the INSERT button to clear the screen and get ready for the next entry.

#### **If selecting the rate type Square Foot option (Option 4):**

- ◆ Click with the mouse in the first field in the Square Foot section to enter the Minimum Rate you will charge. Press <TAB>.
- ◆ Enter cost per square foot. Press <TAB>.
- ◆ Enter the Maximum Rate you will charge.
- ◆ Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

### **4.8.3 TAB 2: Room Styles**

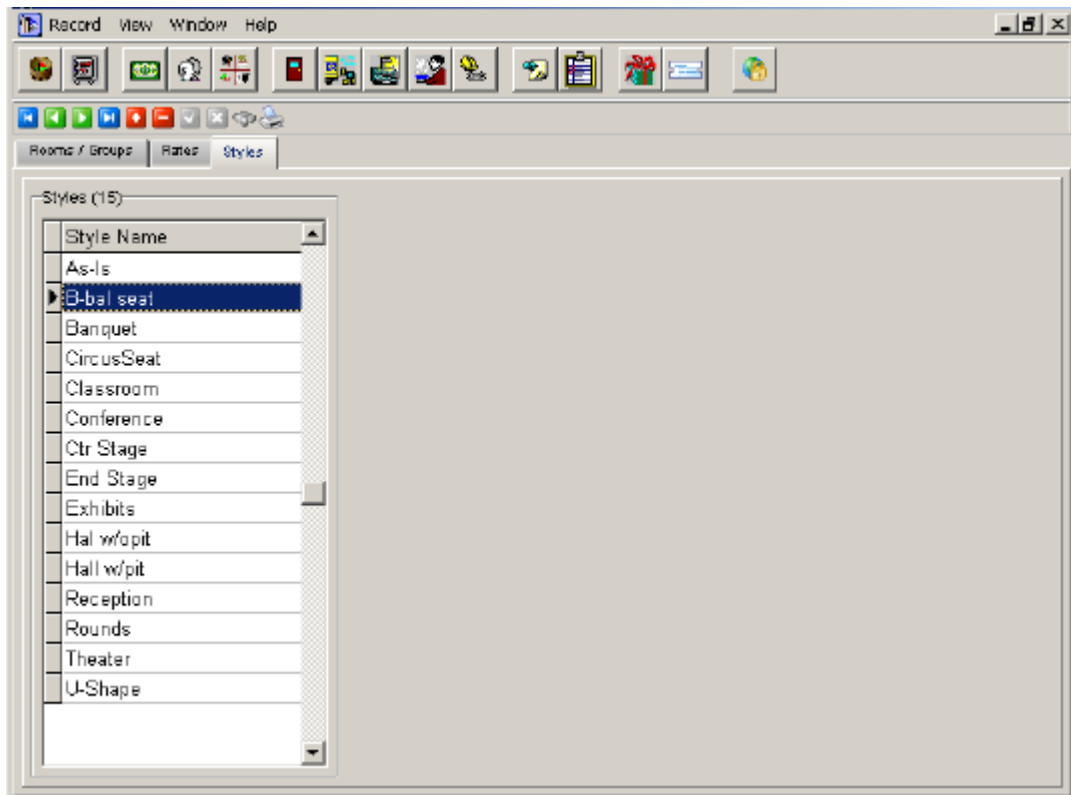
#### **TAB 2: Room Styles**

Room Styles categorizes the possible seating and equipment configurations available for each room within your center.

#### **4.8.3.1 Entering Room Styles**

##### **Entering Room Styles**

- ◆ Click on the Styles TAB on the bottom of the Rooms window.
- ◆ The entry form changes to the Room Styles screen.



- ◆ Click on the INSERT button to insert a new line into the table.
- ◆ Type in the Description for a style and click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- ◆ Click on the INSERT button to insert the next blank line into the table.
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.9 Vendors



### Vendors

The Vendors database enables you to enter personal information about each vendor doing business with your center. Supplier information is useful when ordering, replacing, or renting equipment. Your meal Catering Companies would also be stored in this database.

#### Entering Vendors

FASTbook 5.5 Setup - [Vendors]

Record View Window Help

Date Created/Updated  
Created 02/03/1998  
Updated 02/03/2005 11:28 AM

Vendor  
Name Catering By Anthony2  
Business Hours 8-5

Type of Vendor  
 Equipment  Labor  Caterer  Other

Reference Number

Address  
Address 1 PO BOX 235  
Address 2  
Address 3  
City Tipton  
State CA Zip 93272

Contacts  
First Anthony Bettencourt  
Phone 209 752-4417 Ext  
Second 209-555-1212  
Phone Ext  
FAX

Name: SUPERVISOR

- From the View Pull-Down Menu in the Action bar, pick Vendors by clicking on it or use your mouse to click on the Vendors button in the toolbar.
- The Vendors window opens.
- Click on the INSERT button to clear the screen.
- Type in the Name of the Vendor and press <TAB>.
- Type in the Business Hours. Press <TAB>.
- Click on the appropriate category in the radio button group to define the Type of Vendor. Categories are **Equipment**, **Labor**, **Caterer**, and **Other**.
- Enter Address 1, and Address 2. Press <TAB> after each entry.
- Enter the City, State, and Zip. Press <TAB> after each entry.

- Enter the Name of the contact person. Press <TAB>.
- Enter the contact person's Phone number. Press <TAB>.
- Enter the second contact person's name and phone number. Press <TAB> after each entry.
- Enter the FAX number for the Vendor. Press <TAB>.
- Click on the SAVE button to save your record.  
**Fastbook** will now stamp this record with the date and time created and update it for easy tracking and later reference.
- Click on the INSERT button to clear the screen and enter the next Vendor.
- Click on the Post edit button to save the last entry before exiting.

## 4.9.1 Entering Vendors

### Entering Vendors

- ◆ From the View Pull-Down Menu in the Action bar, pick Vendors by clicking on it or use your mouse to click on the Vendors button in the toolbar.
- ◆ The Vendors window opens.
- ◆ Click on the INSERT button to clear the screen.
- ◆ Type in the Name of the Vendor and press <TAB>.
- ◆ Type in the Business Hours. Press <TAB>.
- ◆ Click on the appropriate category in the radio button group to define the Type of Vendor. Categories are **Equipment**, **Labor**, **Caterer**, and **Other**.
- ◆ Enter Address 1, and Address 2. Press <TAB> after each entry.

Enter the City, State, and Zip. Press <TAB> after each entry.

- ◆ Enter the Name of the contact person. Press <TAB>.
- ◆ Enter the contact person's Phone Number. Press <TAB>.
- ◆ Enter the second contact person's name and phone number. Press <TAB> after each entry.
- ◆ Enter the FAX number for the Vendor. Press <TAB>.
- ◆ Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- ◆ Click on the INSERT button to clear the screen and enter the next Vendor.
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.10 Equipment



### Equipment

The Equipment database allows you to enter all equipment that your center supplies. It keeps track of all equipment in use, as well as equipment available for scheduling. The Equipment Package database enables you to combine several pieces of equipment into comprehensive packages. These packages can then be scheduled as a single unit for a specific room, eliminating the need to list every piece of required equipment separately.

### Entering Equipment

- From the View Pull-Down Menu in the Actionbar, pick Equipment by clicking on it or use your mouse to click on the Equipment button in the toolbar.
- The Equipment window opens.
- Click on the INSERT button to clear the screen.
- Type in the Description for the piece of equipment and press <TAB>.
- If you have multiple sites enter the location for the piece of equipment. Press <TAB>.
- Click on the radio button for Equipment. Press <TAB>.
- Enter the Accounting Code and press <TAB>.

The screenshot shows the 'Equipment' entry window in FASTbook. The window has a menu bar (Record, View, Window, Help) and a toolbar. The main content area is divided into several sections:

- Equipment Description:** Includes fields for 'Created' (03/28/2005), 'Updated' (3/28/2005 1:53 PM), 'Description' (Fork Lift), 'Location', 'Not Taxed', 'Not Active', and 'User Can Edit Charge'. There are radio buttons for 'Equipment' (selected) and 'Equipment Package'.
- Additional Information:** Includes fields for 'Accounting Code', 'Unit Type', 'Quantity Available' (3), 'Unit Cost', 'Minimum Provided', and 'Replacement Cost'.
- Type of Equipment:** Includes radio buttons for 'Audio Visual' (selected), 'Furniture', and 'Other'.
- Rates (2):** A table with columns 'Client Category' and 'Charge'.
 

Client Category	Charge
Non-Profit	\$150.00
Promoter	\$150.00
- Equipment Items (0):** An empty table with columns 'Equipment Description' and 'Qty'.

At the bottom of the window are two 'Multi Assign' buttons.

- Enter the Unit Type. Press <TAB>.
- Enter the Unit Cost. Press <TAB>.
- Enter the total Quantity that is available and press <TAB>.
- Type in the minimum of the equipment unit supplied for a booking. Press <TAB>.
- Enter the Replacement Charge. Press <TAB>.
- Select the Type of Equipment by clicking on the appropriate radio button. You can choose

from Audio Visual, Furniture, and Other. Press <TAB>.

**FASTbook** will now save the record and stamp it with the date and time created and update it for easy tracking and later reference.

- To assign the appropriate rates, click on the Multi Assign button at the bottom of the rates box.
- While holding the <CTRL> key down, click on the Client Categories that are appropriate.
- Assign a Rental Charge in the Default Charge table, click on OK.
- To exit the table and highlight the first field, press <ENTER>.
- Click on the Post Edit button to save the last entry before exiting.

#### **Entering Equipment Packages**

- From the View Pull-Down Menu in the Actionbar pick Equipment by clicking on it or use your mouse to click on the Equipment button in the toolbar.
- The Equipment window opens.
- Click on the INSERT button to clear the screen.
- Type in the Description for an equipment package and press <TAB>.
- Click on the radio button for Equipment Package. Press <TAB>.



**NOTE:** **FASTbook** defaults to Equipment. Once you activate the Equipment Package button, only the Equipment Items table at the bottom of the screen is active. After saving the record as a Package, it cannot be changed.

- If you have multiple Locations, enter the location for the Equipment Package. Press <TAB>.
- Select the Type of Equipment by clicking on the appropriate radio button. You can choose from Audio Visual, Furniture, and Other. Press <TAB>.

**FASTbook** will now save the record and stamp it with the date and time created and update it for easy tracking and later reference.

- To assign pieces of equipment to a Equipment Package select Equipment Items from the predefined Equipment database by clicking on the Multi-Assign button at the bottom of the Equipment Items column.
- While holding the <CTRL> key down, click on the Equipment Items that are needed for the package.
- Enter the total number of equipment units to be included in the package, then click OK. .
- To exit the table and return to the first field, press <ENTER>.
- Click on the Post Edit button to save the last entry before exiting.

### **4.10.1 Entering Equipment**

#### **Entering Equipment**

- ◆ From the View Pull-Down Menu in the Action bar, pick Equipment by clicking on it or use your mouse to click on the Equipment button in the toolbar.
- ◆ The Equipment window opens.

- ◆ Click on the INSERT button to clear the screen.
- ◆ Type in the Description for the piece of equipment and press <TAB>.
- ◆ If you have multiple sites enter the location for the piece of equipment. Press <TAB>.
- ◆ Click on the radio button for Equipment. Press <TAB>.
- ◆ Enter the Accounting Code and press <TAB>.

The screenshot shows the 'Record' window in the FASTbook application. The 'Equipment Description' section includes a 'Description' field containing 'Fork Lift' and a 'Location' dropdown menu. There are checkboxes for 'Not Taxed', 'Not Active', and 'User Can Edit Charge'. The 'EquipmentRadioGroup' section has radio buttons for 'Equipment' (which is selected) and 'Equipment Package'. The 'Additional Information' section contains fields for 'Accounting Code', 'Unit Type', 'Quantity Available' (set to 3), 'Unit Cost', 'Minimum Provided', and 'Replacement Cost'. The 'Equipment Items (0)' section is a table with columns for 'Equipment Description' and 'Qty.'. The 'Type of Equipment' section has radio buttons for 'Audio Visual' (selected), 'Furniture', and 'Other'. The 'Rates (2)' section contains a table with two rows: 'Non-Profit' and 'Promoter', both with a 'Charge' of '\$150.00'. A 'Multi Assign' button is located at the bottom of the 'Rates' section.

- ◆ Enter the Unit Type. Press <TAB>.
- ◆ Enter the Unit Cost. Press <TAB>.
- ◆ Enter the total Quantity that is available and press <TAB>.
- ◆ Type in the minimum of the equipment unit supplied for a booking. Press <TAB>.
- ◆ Enter the Replacement Charge. Press <TAB>.
- ◆ Select the Type of Equipment by clicking on the appropriate radio button. You can choose from Audio Visual, Furniture, and Other. Press <TAB>.

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- ◆ To assign the appropriate rates, click on the Multi Assign button at the bottom of the rates



box.

- ◆ While holding the <CTRL> key down, click on the Client Categories that are appropriate.
- ◆ Assign a Rental Charge in the Default Charge table, click on OK.
- ◆ To exit the table and highlight the first field, press <ENTER>.
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.10.2 Entering Equipment Packages

### Entering Equipment Packages

- ◆ From the View Pull-Down Menu in the Action bar pick Equipment by clicking on it or use your mouse to click on the Equipment button in the toolbar.
- ◆ The Equipment window opens.
- ◆ Click on the INSERT button to clear the screen.
- ◆ Type in the Description for an equipment package and press <TAB>.
- ◆ Click on the radio button for Equipment Package. Press <TAB>.



**NOTE:** FASTbook defaults to Equipment. Once you activate the Equipment Package button, only the Equipment Items table at the bottom of the screen is active. After saving the record as a Package, it cannot be changed.

- ◆ If you have multiple Locations, enter the location for the Equipment Package. Press <TAB>.
- ◆ Select the Type of Equipment by clicking on the appropriate radio button. You can choose from Audio Visual, Furniture, and Other. Press <TAB>.

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- ◆ To assign pieces of equipment to an Equipment Package select Equipment Items from the predefined Equipment database by clicking on the Multi Assign button at the bottom of the Equipment Items column.
- ◆ While holding the <CTRL> key down, click on the Equipment Items that are needed for the package.
- ◆ Enter the total number of equipment units to be included in the package, then click OK. .
- ◆ To exit the table and return to the first field, press <ENTER>.
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.11 Meals



### Meals

The Meals database allows you to set up catering menus that can be scheduled for any event requiring meals. The database stores common meal packages that your center offers. Create as many Meal Menus as desired. Using different Client Categories, **FASTbook** allows for charging different rates for the same meal.

#### Entering Meals

- From the View Pull-Down Menu in the Actionbar, pick Meals by clicking on it or use your mouse to click on the Meals button in the toolbar.
- The Meals window opens.
- Click on the INSERT button to clear the screen.
- Type in the Description for a meal and press <TAB>.
- Select if the record you are setting up is a Meal, a Beverage, or Other by clicking on the appropriate Radio button.
- Type in the Actual Cost (the price you are charged) for the meal. Press <TAB>.
- Type in the Accounting Code. Press <TAB>.
- Select the name of the Caterer from the combo list previously setup in Vendor Setup (if applicable). Press <TAB>.

The screenshot shows the 'Meals' entry window in FASTbook. The window has a menu bar (Record, View, Window#, Help) and a toolbar. The main content area is organized as follows:

- Date Created/Updated:** Date Created: 03/28/2005, Date Updated: 05/18/2005 10:18:05 A.
- Meal Type:**  Inactive,  Meal,  Beverage,  Other.
- Description:** Country Brunch
- Details:** Actual Cost: \$6.46, Caterer: [dropdown], Acct Code: M-CB 129-77
- Meal Rates (3):**

Category	Price
Promotor	\$8.94
Non-Profit	\$8.94
Standard	\$8.94
- Meal Items:**

Item	Description	Price	Choices
<input checked="" type="checkbox"/>	Scrambled Eggs		[dropdown]
<input type="checkbox"/>	Biscuits		[dropdown]
<input type="checkbox"/>	Danish Rolls		[dropdown]
<input type="checkbox"/>	Coffee, Tea & Juice		[dropdown]

A 'Multi Assign' button is located at the bottom left of the window. A yellow tooltip at the bottom right of the Meal Items table reads 'Items in the meal and their costs.'

**FASTbook** will now save the record and stamp it with the date and time created and update it for easy tracking and later reference.

- To assign the appropriate rates, click on the Multi Assign button at the bottom of the rates box.
- While holding the <CTRL> key down, click on the Bill Categories that are appropriate.
- Type in the price you charge in the Default Charge table, click on OK.
- If the price you charge for each Billing Category is different than the default charge you can make the changes now. Press <TAB>.
- Click in the Meal items table or press <ENTER> from the Billing Category table.
- Type in the first menu item and press <TAB>.
- Type in the Cost for that menu item (if applicable). Press <TAB>.
- Type in the second item that is supplied with the meal. Press <TAB>.
- Type in the cost for the second item (if applicable) and press <TAB>.
- Repeat above steps to enter additional items as required. Press <ENTER> when you have entered all meal items.
- Click on the INSERT button to clear the screen and enter the next Meal.
- Click on the Post Edit button to save last entry before exiting.

#### 4.11.1 Entering Meals

##### Entering Meals

- ◆ From the View Pull-Down Menu in the Action bar, pick Meals by clicking on it or use your mouse to click on the Meals button in the toolbar.
- ◆ The Meals window opens.
- ◆ Click on the INSERT button to clear the screen.
- ◆ Type in the Description for a meal and press <TAB>.
- ◆ Select if the record you are setting up is a Meal, a Beverage, or Other by clicking on the appropriate Radio button.
- ◆ Type in the Actual Cost (the price you are charged) for the meal. Press <TAB>.
- ◆ Type in the Accounting Code. Press <TAB>.
- ◆ Select the name of the Caterer from the combo list previously setup in Vendor Setup (if applicable). Press <TAB>.

The screenshot shows the FASTbook application window with the following details:

- Date Created/Updated:** Date Created: 03/28/2005, Date Updated: 05/18/2005 10:16:05 A
- Meal Type:** Inactive checkbox, Description: Country Brunch, Radio buttons for Meal (selected), Beverage, and Other.
- Details:** Actual Cost: \$5.46, Caterer: [dropdown], Acct Code: M-CB 129-77
- Meal Rates (3):**

Category	Price
Promoter	\$8.94
Non-Profit	\$8.94
Standard	\$8.94
- Meal Items:**

Items Description	Price	Choices
Scrambled Eggs		[choices]
Biscuits		[choices]
Danish Rolls		[choices]
Coffee, Tea & Juice		[choices]

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- ◆ To assign the appropriate rates, click on the Multi Assign button at the bottom of the rates box.
- ◆ While holding the <CTRL> key down, click on the Bill Categories that are appropriate.
- ◆ Type in the price you charge in the Default Charge table, click on OK.
- ◆ If the price you charge for each Billing Category is different than the default charge you can make the changes now. Press <TAB>.
- ◆ Click in the Meal items table or press <ENTER> from the Billing Category table.
- ◆ Type in the first menu item and press <TAB>.
- ◆ Type in the Cost for that menu item (if applicable). Press <TAB>.
- ◆ Type in the second item that is supplied with the meal. Press <TAB>.
- ◆ Type in the Cost for the second item (if applicable) and press <TAB>.
- ◆ Repeat above steps to enter additional items as required. Press <ENTER> when you have entered all meal items.
- ◆ Click on the INSERT button to clear the screen and enter the next Meal.
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.12 Labor



**NOTE:** The Labor setup window consists of two pages: The Labor Rates setup and the Employee setup. The TABS on the bottom of the window allow for easy swapping between pages and because the TAB for the page you are working on is always highlighted in the screen color, there will never be a doubt about what page you are working on.

### **TAB 1: Labor Rates**

The Labor Rates database enables you to set up individual positions that your center employs, and to enter the applicable compensation schedule for each position.

### **Entering Labor Rates**

- From the View Pull-Down Menu in the Actionbar pick Labor by clicking on it or use your mouse to click on the Labor button in the toolbar.
- The Labor window opens with the page for Labor Rates active.
- Click on the INSERT button to clear the screen.
- Type in the Description for a position and press <TAB>.
- Type in the Minimum Shift Hours for that position. Press <TAB>.

The screenshot shows a software window titled "Record" with a menu bar (Record, View, Window, Help) and a toolbar. Below the toolbar are two tabs: "Labor Rates" and "Labor Positions". The "Labor Positions" tab is selected and contains the following fields:

- Date Created/Updated:** Created: 03/28/2005, Updated: 12/30/1899 12:00 AM
- Position:**  Not Active, Name: Carpenters
- General Information:** Accounting Code: L-C 1204,  Union,  Vendor Supplied
- Billing Information:**
  - Hourly Rate 1: \$18.00, Overtime Rate: \$27.00
  - Hourly Rate 2: [Empty]
  - Flat Rate: [Empty], Hourly Rate 3: [Empty]

Type in the various rates and gratuities that apply for the position. Press <TAB> or <ENTER> to advance after completing a field.

- Leave fields that do not apply blank, by either entering '0' or pressing <TAB> or <ENTER>.
- Click on the SAVE button to save your new record.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- Click on the INSERT button to clear the screen and enter the next Position and Rate.
- Double-click on the System-Menu-Icon or choose Close from the menu that drops down; click on the System-Menu-Icon once to exit Labor.

### Entering Labor Positions

Position	Pref	Mon	From	To	Tue	From	To	Wed	From
Floor managers	1	<input checked="" type="checkbox"/>	6:00 AM	6:00 PM	<input checked="" type="checkbox"/>	6:00 AM	3:00 PM	<input checked="" type="checkbox"/>	6:00 AM
House managers	1	<input checked="" type="checkbox"/>	6:00 AM	6:00 PM	<input checked="" type="checkbox"/>	6:00 AM	3:00 PM	<input checked="" type="checkbox"/>	6:00 AM

### 4.12.1 Entering Labor Rates

#### Entering Labor Rates

- ◆ From the View Pull-Down Menu in the Action bar, pick Labor by clicking on it or use your mouse to click on the Labor button in the toolbar.
- ◆ The Labor window opens with the page for Labor Rates active.
- ◆ Click on the INSERT button to clear the screen.
- ◆ Type in the Description for a position and press <TAB>.
- ◆ Type in the Minimum Shift Hours for that position. Press <TAB>.

- ◆ Type in the various rates and gratuities that apply for the position. Press <TAB> or <ENTER> to advance after completing a field.
- ◆ Leave fields that do not apply blank, by either entering '0' or pressing <TAB> or <ENTER>.
- ◆ Click on the SAVE button to save your new record.  
FASTbook will now stamp this record with the date and time created and updated for easy tracking and later reference.
- ◆ Click on the INSERT button to clear the screen and enter the next Position and Rate.
- ◆ Double-click on the System-Menu-Icon or choose Close from the menu that drops down if you click on the System-Menu-Icon once to exit Labor.

## 4.13 Ticklers



### Ticklers

The Ticklers database allows you to set up and maintain an activity register that incorporates event related tasks in a chronological order. Each register can then be attached to a specific event which then enables the system to notify responsible parties (authorized users) when each task becomes due.



Ticklers assist you in keeping track of all the tasks associated with a particular event. They serve as reminders of activities that must take place prior to, during, and after an event.

Ticklers can only be modified using this screen. Actions and Days away cannot be modified when a Tickler is created for an event.

Days away is specified as follows:

- The event Start Date is always '0'.
- Activities prior to the event are entered with a minus (-).
- Activities during the event are entered as 0.
- Activities past the event date are entered as normal positive numbers.

### Entering Ticklers

- From the View Pull-Down Menu in the Actionbar, pick Ticklers by clicking on it or use your mouse to click on the Ticklers button in the toolbar.
- The Ticklers window opens.
- Click on the INSERT button to clear the screen.

Action	Base Date On	Days Away	Person Assigned
Review Contract Back	Start Date	-45	ALICE
Send Contract	Start Date	-60	ALICE
Send Thank You Note	End Date	5	MARY
Check Insurance	Start Date	-15	ALICE
Notify Catering	Start Date	-21	KEITH
Notify Operations	Start Date	-11	Opps

- Type in the Description for a Tickler and press <TAB>.

If you want this tickler to set automatically every time you create a new event, Check the "Create Tickler Automatically for New Event" check box.

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- Type in the first action associated with the tickler. Press <TAB>.



**NOTE:** Actions preceding an event are entered as negative numbers (e.g. '-30'), the actual event is entered as a '0', and actions following the event are entered as positive numbers (e.g. '15'), if you choose to calculate from the Event Start or End Date.

If the Date the Event was created is selected, all numbers have to be positive.

- Enter the number of days the action is away from the event. Press <TAB>.
- Pick the Name (Login Name) of the employee responsible for the particular action from the previously defined list and press <TAB>.



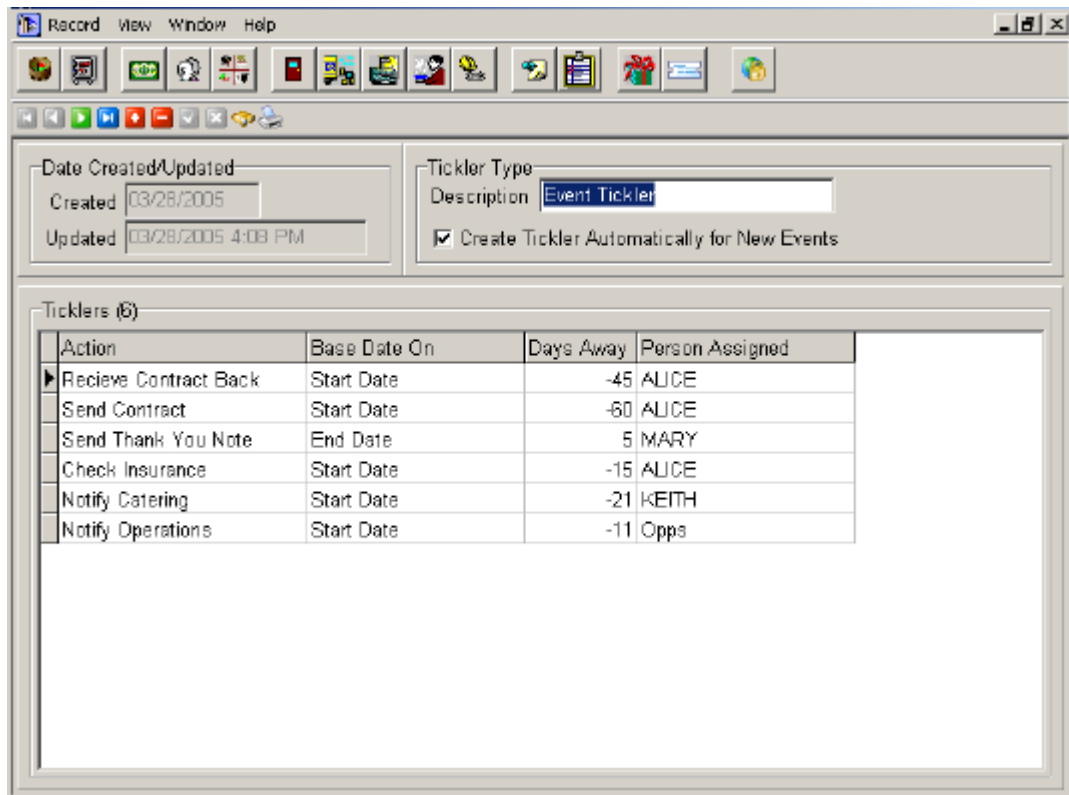
**NOTE:** You have the option to calculate the due dates from either the **Event Start Date**, the **Event End Date**, the **Date the Event was Created** or the **Date Tickler was Created**. Those four options are hard- coded into **FASTbook**.

- Pick the Base Date you want the Due Date to be calculated with from the three options in the drop-down list and press <TAB>.
- Repeat the above steps to continue setting up the Tickler.
- Click on the INSERT button to clear the screen and enter the next Tickler.
- Click on the Post Edit button to save the last entry before exiting.

### 4.13.1 Entering Ticklers

#### Entering Ticklers

- ◆ From the View Pull-Down Menu in the Action bar, pick Ticklers by clicking on it or use your mouse to click on the Ticklers button in the toolbar.
- ◆ The Ticklers window opens.
- ◆ Click on the INSERT button to clear the screen.



- ◆ Type in the Description for a Tickler and press <TAB>.

If you want this tickler to set automatically every time you create a new event Check the "Create Tickler Automatically for New Event" check box.

**FASTbook** will now save the record and stamp it with the date and time created and updated for easy tracking and later reference.

- ◆ Type in the first action associated with the tickler. Press <TAB>.



**NOTE:** Actions preceding an event are entered as negative numbers (e.g. '-30'), the actual event is entered as a '0', and actions following the event are entered as positive numbers (e.g. '15'), if you choose to calculate from the Event Start or End Date.

If the Date the Event was created is selected, all numbers have to be positive.

- ◆ Enter the number of days the action is away from the event. Press <TAB>.
- ◆ Pick the Name (Login Name) of the employee responsible for the particular action from the previously defined list and press <TAB>.



**NOTE:** You have the option to calculate the due dates from either the **Event Start Date**, the **Event End Date**, the **Date the Event was Created** or the **Date Tickler was Created**. Those four options are hard-coded into **FASTbook**.

- ◆ Pick the Base Date you want the Due Date to be calculated with from the three options in the drop-down list and press <TAB>.

- ◆ Repeat the above steps to continue setting up the Tickler.
- ◆ Click on the INSERT button to clear the screen and enter the next Tickler.
- ◆ Click on the Post Edit button to save the last entry before exiting.

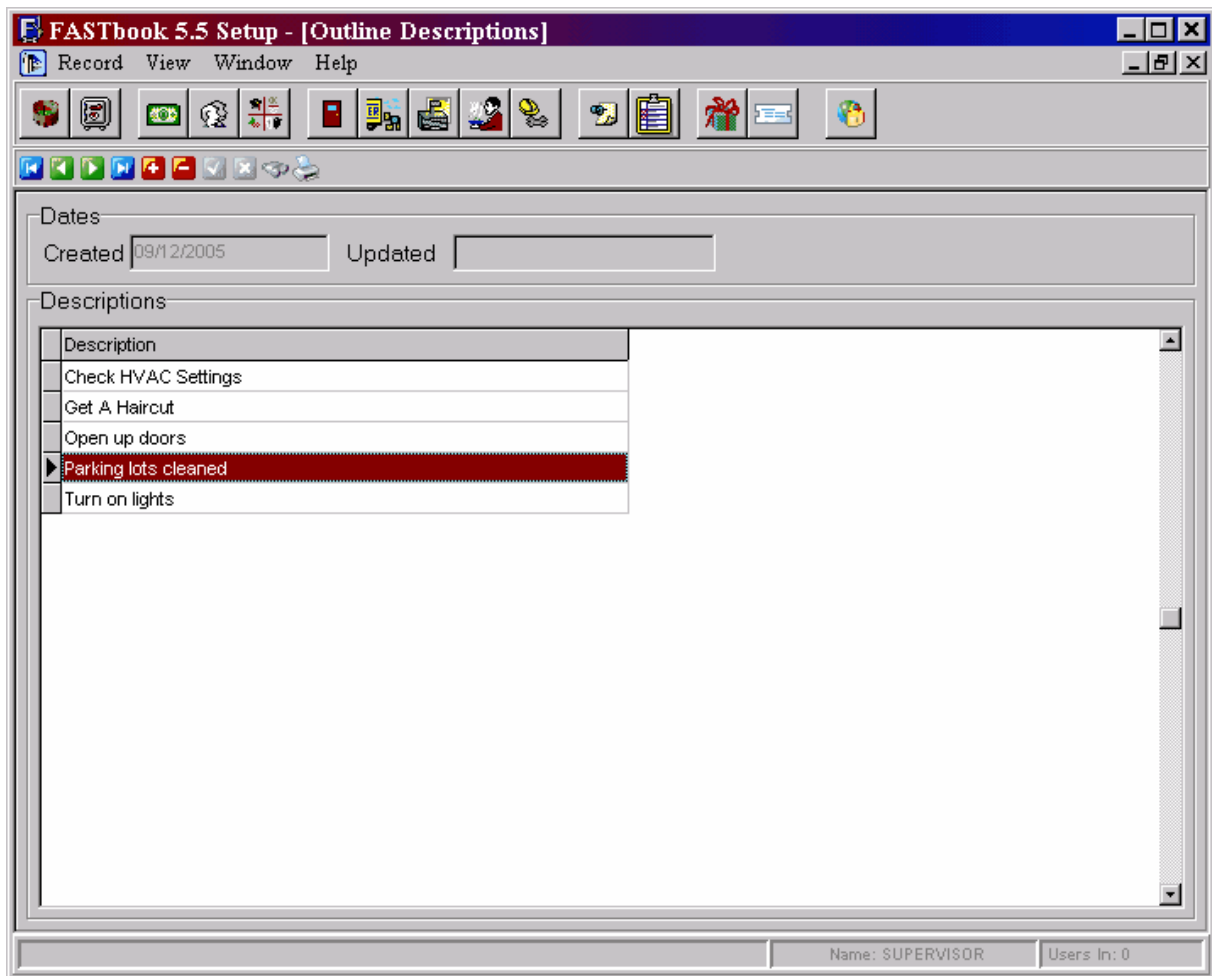
## 4.14 Outline Descriptions



### Event Outline Descriptions

The Outline database allows you to set up the master descriptions that can be scheduled for any event requiring a detail list of things that need to be done.

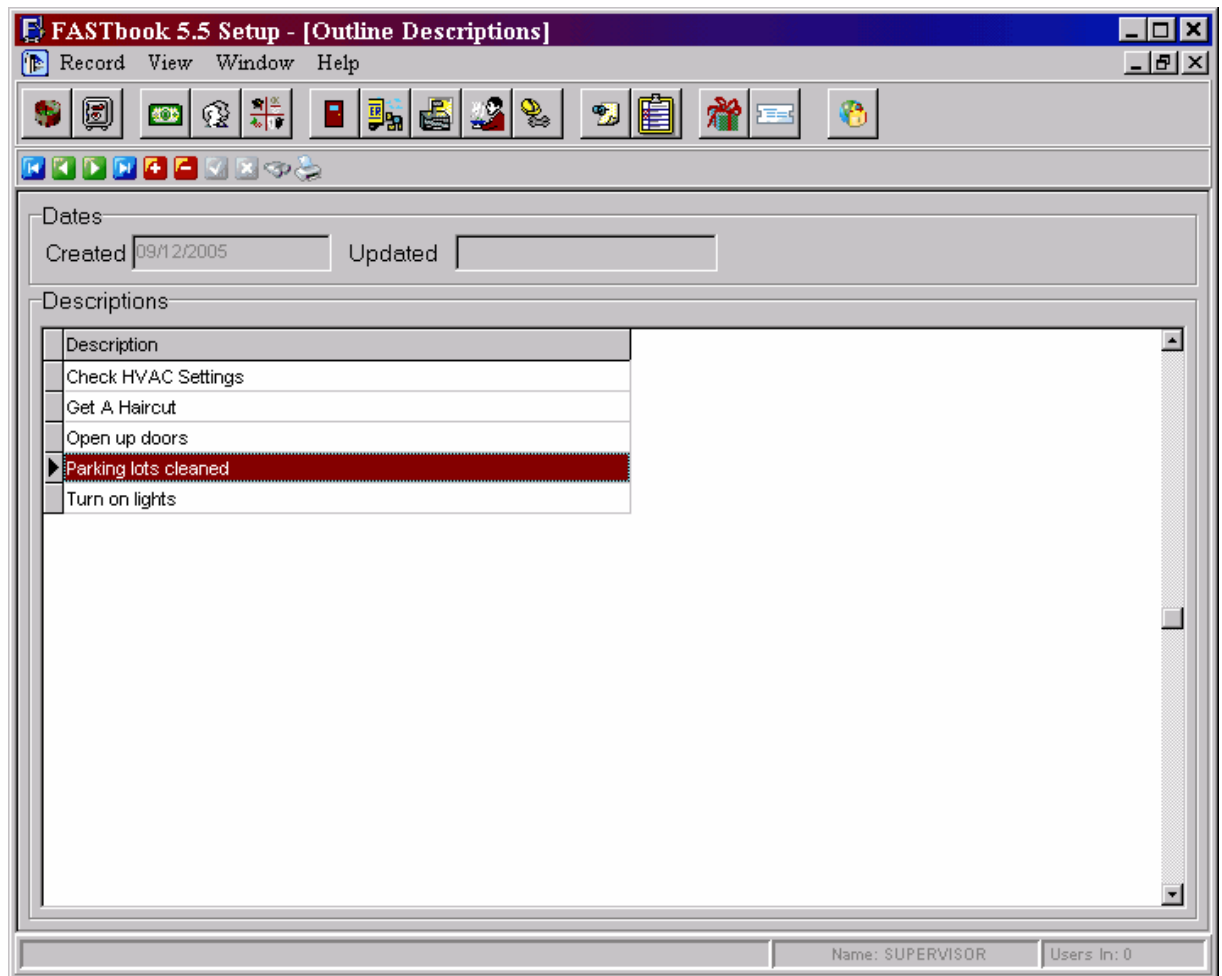
- From the View Pull-Down Menu in the Action bar, pick Outline Descriptions or use your mouse to click on the Outline Descriptions button in the toolbar.
- The Outline Descriptions window opens.
- Click on the INSERT button to clear the screen.
- Enter Description of the event outline type. Press <TAB> after each entry.
- Click on the Post Edit button to save the last entry before exiting.



#### 4.14.1 Entering Outline Descriptions

##### Entering Outline Descriptions

- ◆ From the View Pull-Down Menu in the Action bar, pick Event Outline by clicking on it or use your mouse to click on the Event Outline button in the toolbar.
- ◆ The Event Outline window opens.



- ◆ Click on the INSERT button to clear the screen.
  - ◆ Type in the name of the Description and click on the Post Edit button to save the record.
  - ◆ Click on the INSERT button to insert a new line into the table.
  - ◆ Type in the name of the Description and click on the post edit button to save your new record.
- FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

- ◆ Continue until all Outline Descriptions are entered
- ◆ Click on the Post Edit button to save the last entry before exiting.

## 4.15 Holidays



The Holidays database enables you to set up and keep track of all Holidays that apply to your facility.

### Entering Holidays

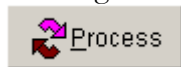
- From the View Pull-Down Menu in the Actionbar, pick Holidays by clicking on it or use your mouse to click on the Holiday button in the toolbar.
- The Holidays window opens.
- Click on the INSERT button or press the Insert button on your keyboard to insert a new line into the Holidays table.
- Type the Name of the Holiday into the description field.

If the Holiday is always on the same date in the same month, like New Years Day, click on the Months (January) and then enter the appropriate Date in the Date section (01).

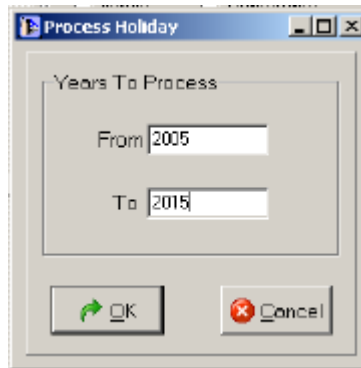
- Define whether or not to allow bookings for that Holiday by clicking on the appropriate Radio button.



**NOTE:** If you don't define the booking option, **FASTbook** will default to 'Do not allow booking'.



- Click on the Process button.

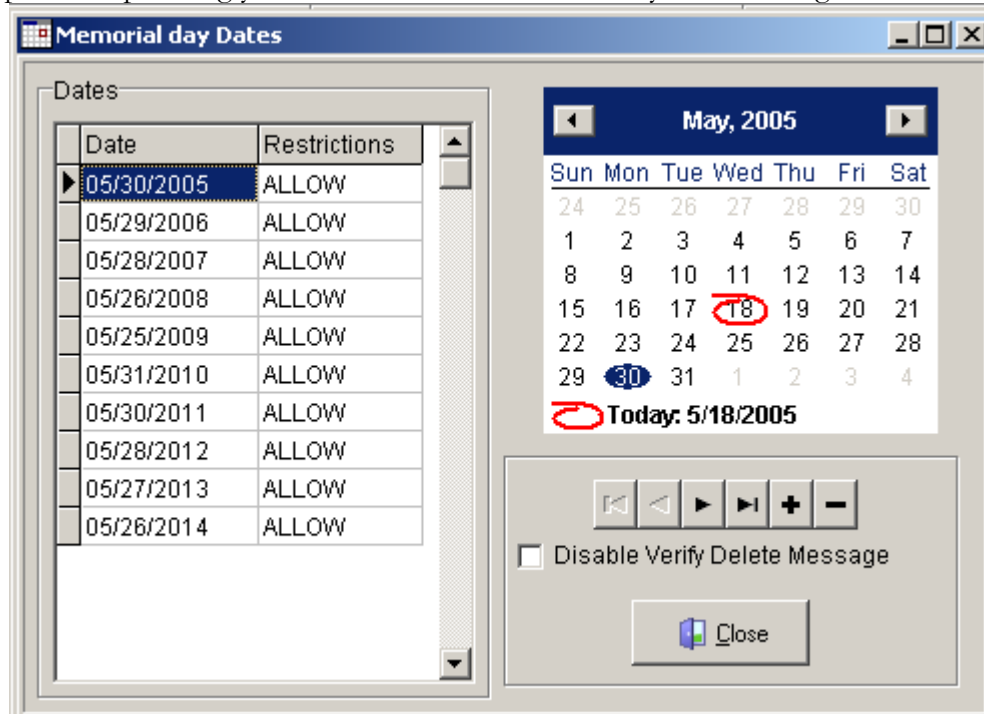


A screen will pop up, allowing you to process the holiday until the year you define. The default is set for 10 years ahead.

- Change the 'To' year if necessary.
- Click the OK button.

The holiday is now being processed for the specified years.

- Click on the VIEW button to review the different days in the week the holiday is going to take place in upcoming years. This screen will also show you if bookings are allowed.



The button group on the right side lets you get to the first and last record quickly without scrolling and deleting holidays from the list line by line.

- On the right side is a small calendar with the holiday you just have just setup, highlighted.
- Click on a different day and you will see that the holiday has a different color than the other days.

The red color tells you that there are no bookings allowed for that day.

The blue color shows that only the Supervisor is allowed to book for that day.



The green color indicates that booking is allowed on the holiday.

- Press the Close button to return to the Holiday screen.

If the Holiday is always on the same weekday in the same month, like Thanksgiving, click on the Month (November), then click on the Week (Last Week), and then click on the Day (Thursday). Define if bookings are allowed on that day.

**NOTE:** If you don't define the booking option, **FASTbook** will default to 'Do not allow booking'.

- Click the Process button.

A screen will pop up, allowing you to process the holiday until the year you define. The default is set for 10 years ahead. Change the 'To' year if necessary.

- Press the OK button.

The holiday is now being processed for the years you specified.

- To view the days in the week the holiday is going to take place in upcoming years and to see if bookings are allowed, press on the VIEW button.
- Press the Close button to return to the Holiday screen.
- Click on the INSERT button to insert the next blank line into the Holiday table.
- By clicking the INSERT button or by moving the cursor to a blank line using the keyboard's arrows, the holiday is automatically saved.

But, if you just enter one holiday and then exit the Holiday setup screen, you have to press the SAVE button in the **FASTbook's** toolbox.

- Click on the Post Edit button to save the last entry before exiting.

### 4.15.1 Entering Holidays

#### Entering Holidays

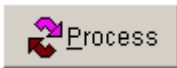
- ◆ From the View Pull-Down Menu in the Action bar pick Holidays by clicking on it or use your mouse to click on the Holiday button in the toolbar.
- ◆ The Holidays window opens.
- ◆ Click on the INSERT button or press the Insert button on your keyboard to insert a new line into the Holidays table.
- ◆ Type the Name of the Holiday into the description field.

If the Holiday is always on the same date in the same month, like New Years Day, click on the Months (January) and then enter the appropriate Date in the Date section (01).

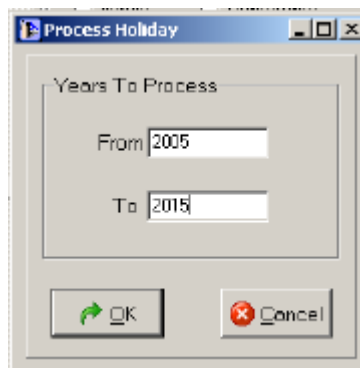
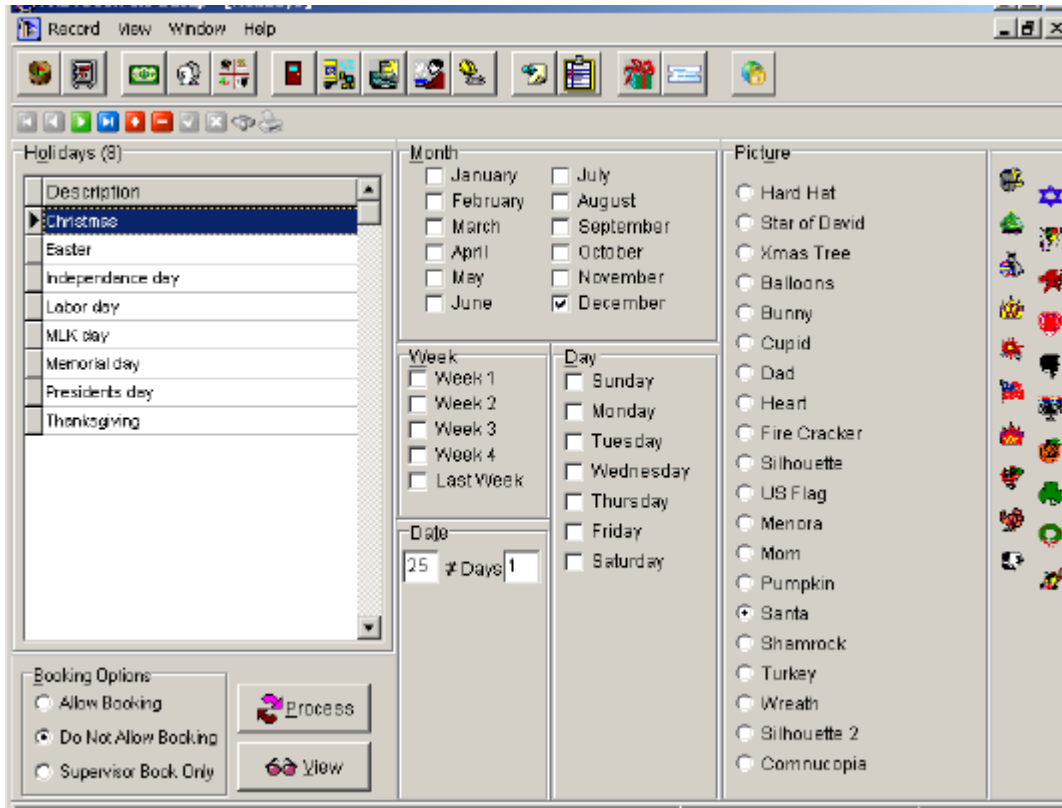
- ◆ Define whether or not to allow bookings for that Holiday by clicking on the appropriate Radio button.



**NOTE:** If you don't define the booking option, **FASTbook** will default to 'Do not allow booking'.



- ◆ Click on the Process button.



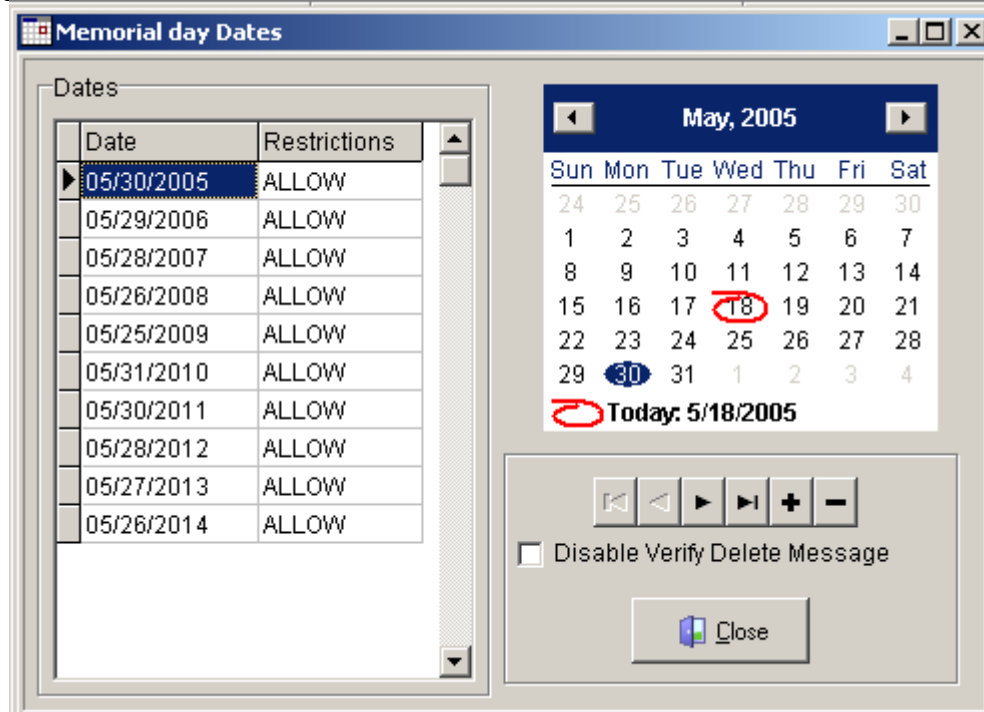
A screen will pop up, allowing you to process the holiday until the year you define. The default is set for 10 years ahead.

- ◆ Change the 'To' year if necessary.

- ◆ Click the OK button.

The holiday is now being processed for the specified years.

- ◆ Click on the VIEW button to review the different days in the week the holiday is going to take place in upcoming years. This screen will also show you if bookings are allowed.



The button group on the right side lets you get to the first and last record quickly without scrolling and delete holidays from the list line by line.

- ◆ On the right side is a small calendar with the holiday which you have just setup highlighted.
- ◆ Click on a different day and you will see that the holiday has a different color than the other days.

The red color tells you that there are no bookings allowed for that day.

The blue color shows that only the Supervisor is allowed to book for that day.

The green color indicates that booking is allowed on the holiday.

- ◆ Press the Close button to return to the Holiday screen.

If the Holiday is always on the same weekday in the same month, like Thanksgiving, click on the Month (November), then click on the Week (Last Week), and then click on the Day (Thursday). Define if bookings are allowed on that day.



**NOTE:** If you don't define the booking option, **FASTbook** will default to 'Do not allow booking'.

- ◆ Click the Process button.

A screen will pop up, allowing you to process the holiday until the year you define. The default is set for 10 years ahead. Change the 'To' year if necessary.

- ◆ Press the OK button.

The holiday is now being processed for the years you specified.

- ◆ To view the days of the week the holiday is going to take place in upcoming years and to see if bookings are allowed, press on the VIEW button.
- ◆ Press the Close button to return to the Holiday screen.
- ◆ Click on the INSERT button to insert the next blank line into the Holiday table.
- ◆ By clicking the INSERT button or by moving the cursor to a blank line using the keyboard's arrows, the holiday is automatically saved.

But, if you just enter one holiday and then exit the Holiday setup screen, you have to press the SAVE button in the **FASTbook's** toolbox.

- ◆ Click on the Post Edit button to save the last entry before exiting.

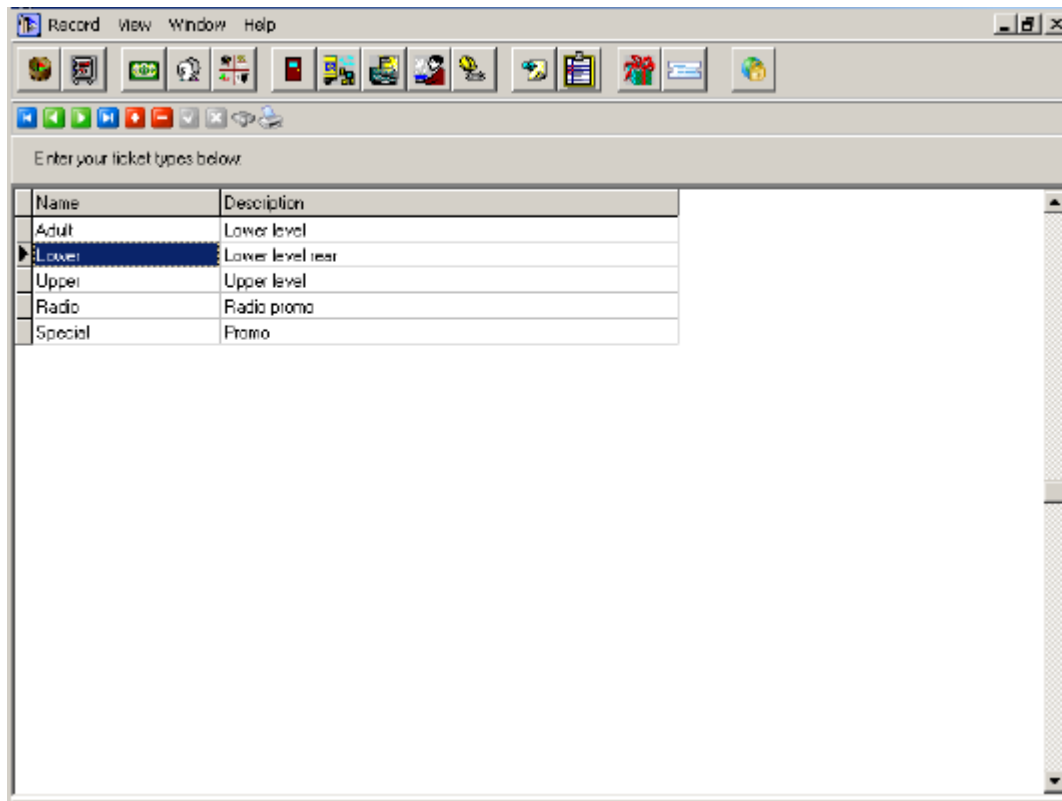
## 4.16 Ticket Types



### **Ticket Types**

The Ticket types database allows you to setup and maintain an active list of different types of tickets. Each ticket type can then be attached to a specific event.

#### **Entering Ticket Types**



- From the View Pull-Down Menu in the Action bar, pick Ticket Types by clicking on it or use your mouse to click on the Ticket Type button in the toolbar.
- The Ticket Types window opens.
- Click on the INSERT button to clear the screen.
- Type in the Name of the ticket type and press <TAB>.
- Enter Description of the type of ticket. Press <TAB> after each entry.
- Click on the Post Edit button to save the last entry before exiting.

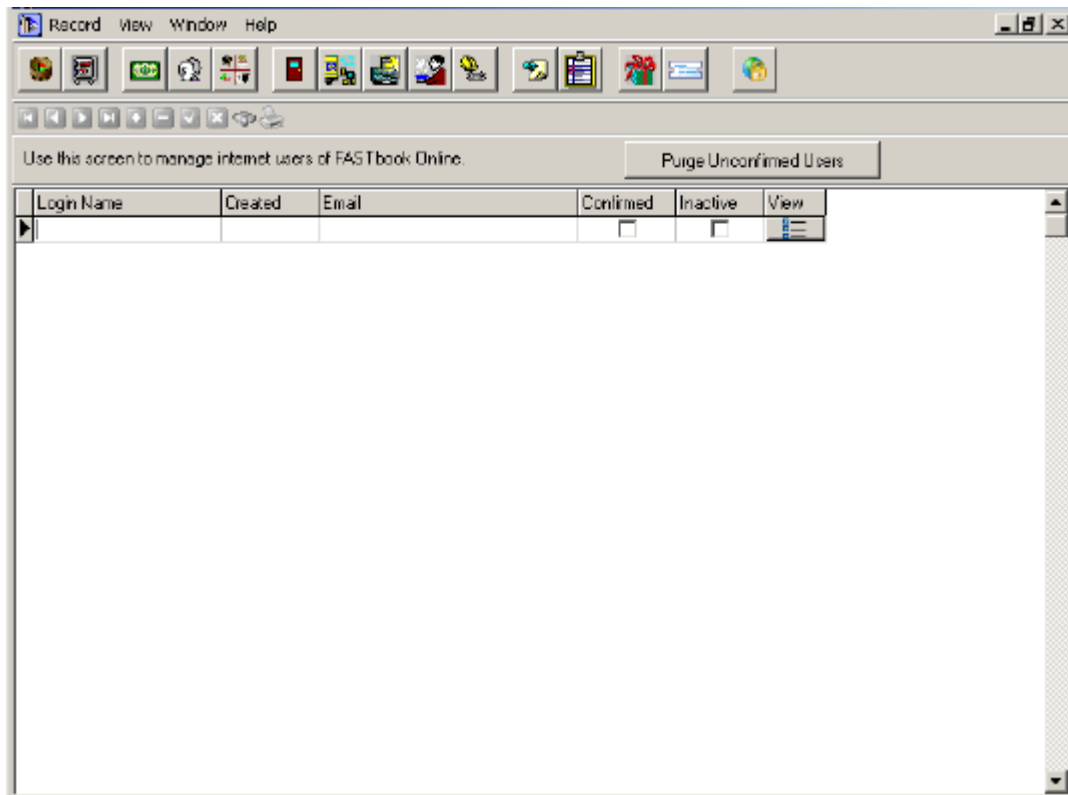
## 4.17 Fastbook Online Security



### Fastbook Online Security

The Fastbook Online Security database allows you to monitor Fastbook Online activity and clear out any stray logins.

#### Entering Fastbook Online Security



- From the View Pull-Down Menu in the Action bar, pick Fastbook Online Security by clicking on it or use your mouse to click on the Fastbook Online Security button in the toolbar.
- The Fastbook Online Security window opens.
- Click on the Login Name Drop-down, select the name you want to make inactive or purge from Fastbook Online.
- Click on the Post Edit button to save the last entry before exiting.

# FASTbook 5.5

# Chapter



5

Main Interface

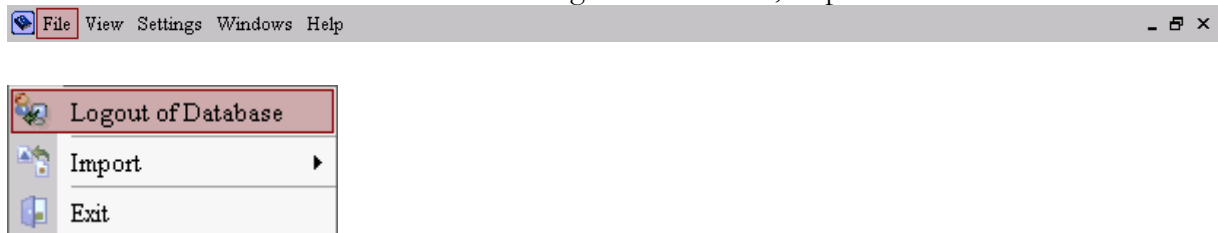
## 5 Main Interface

### 5.1 Main Interface

Main Interface.

The Main Interface is **FASTbook's** file system. The file system is comprised of five components: File, View, Settings, Windows, and Help. Each component allows Fastbook users flexibility and shortcuts in and around Fastbook.

- The File menu consist of three features: Logout of database, Import and Exit.



- The View menu consist of eight features: Toolbars, Event Detail, Calendar, Reports, Setup, Messages, Expired Items, and System Alert Log.



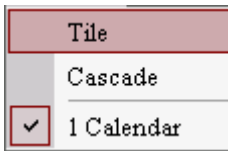
- The Settings menu consist of four features: Show E-Mail Notices, Show Expired Items Notices, Show Hint Help, and Personal Preferences.



- The Windows menu consist of three features: Tile, Cascade, and Calendar.







- The Help menu consist of six features: Contents, About, Tip of the Day, Whats New?, Fastbook Direct (Support Options), and Utilities.



## 5.2 Personal Preferences

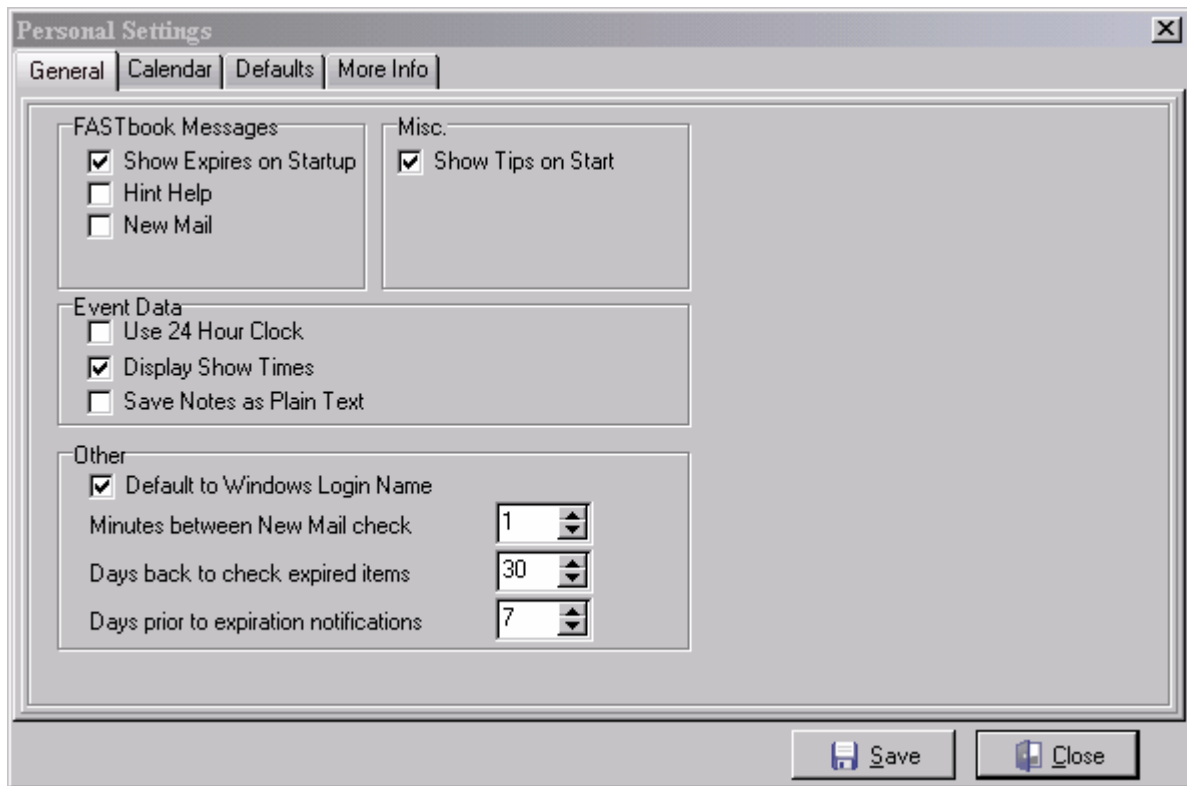
### Personal Preferences

The Personal Preferences - under the Settings from the Main Interface in **FASTbook's** file system; this allows for the personal customization of an individual's view of the calendar. For this feature to work within Fastbook, the users must have Calendar Options selected when setup through Security. To have this feature activated, please see your Fastbook Administrator at your facility.

- From the Settings Menu - select Personal Preferences.



- After selecting Personal Preferences - Personal Settings Windows appears.

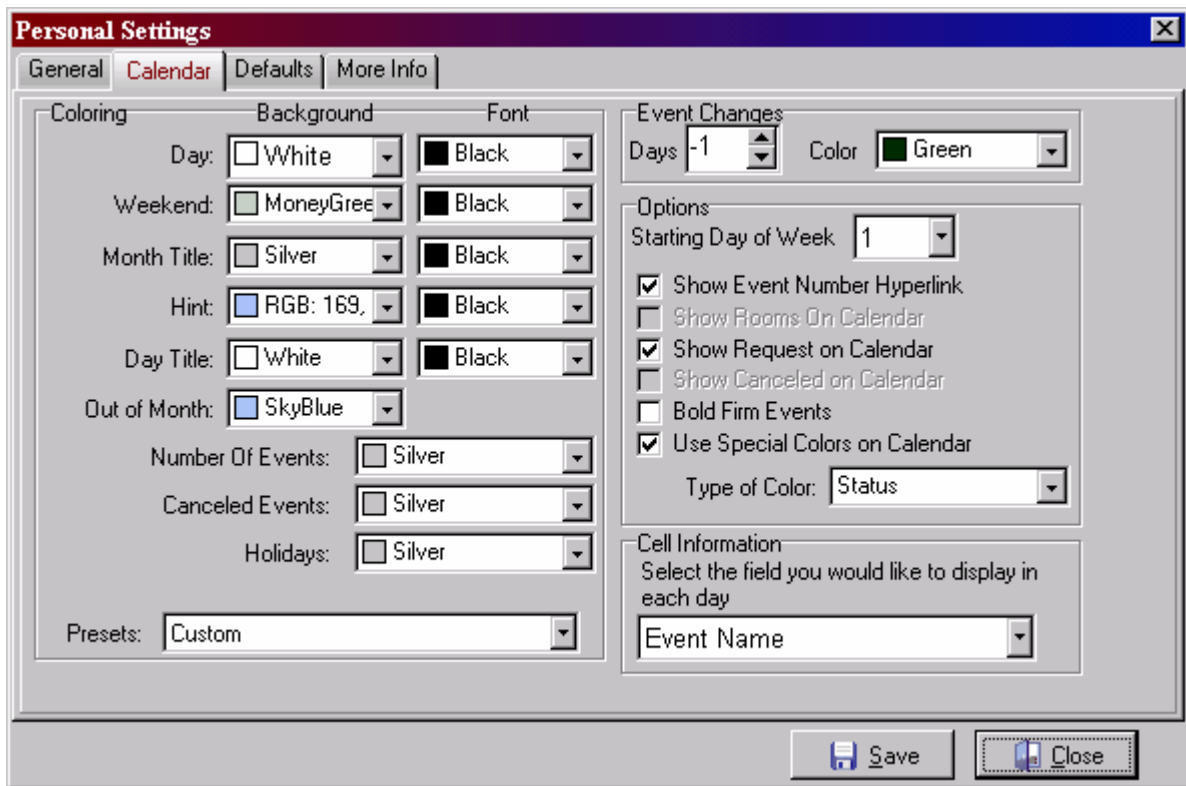


- The General Tab - is divided into four sections: Fastbook Messages, Misc., Event Data, and Other.
- Fastbook Messages - you can customize which messages you want to see when signed on to Fastbook.
- Event Data - you can customize event data.

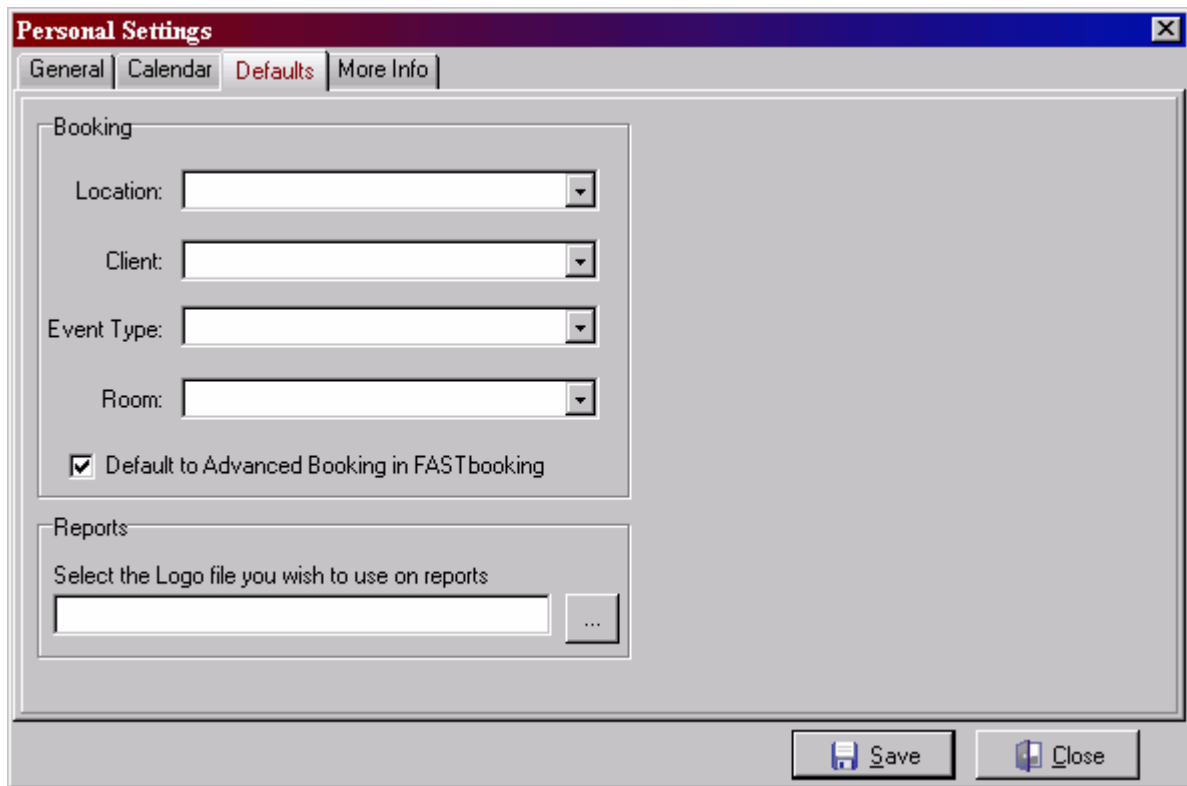
Other - you can customize your Windows Login Name, as well as change time intervals for checking mail messages and expired items.



**NOTE:** The Save button applies changes made to personal settings. The Close button closes the window.



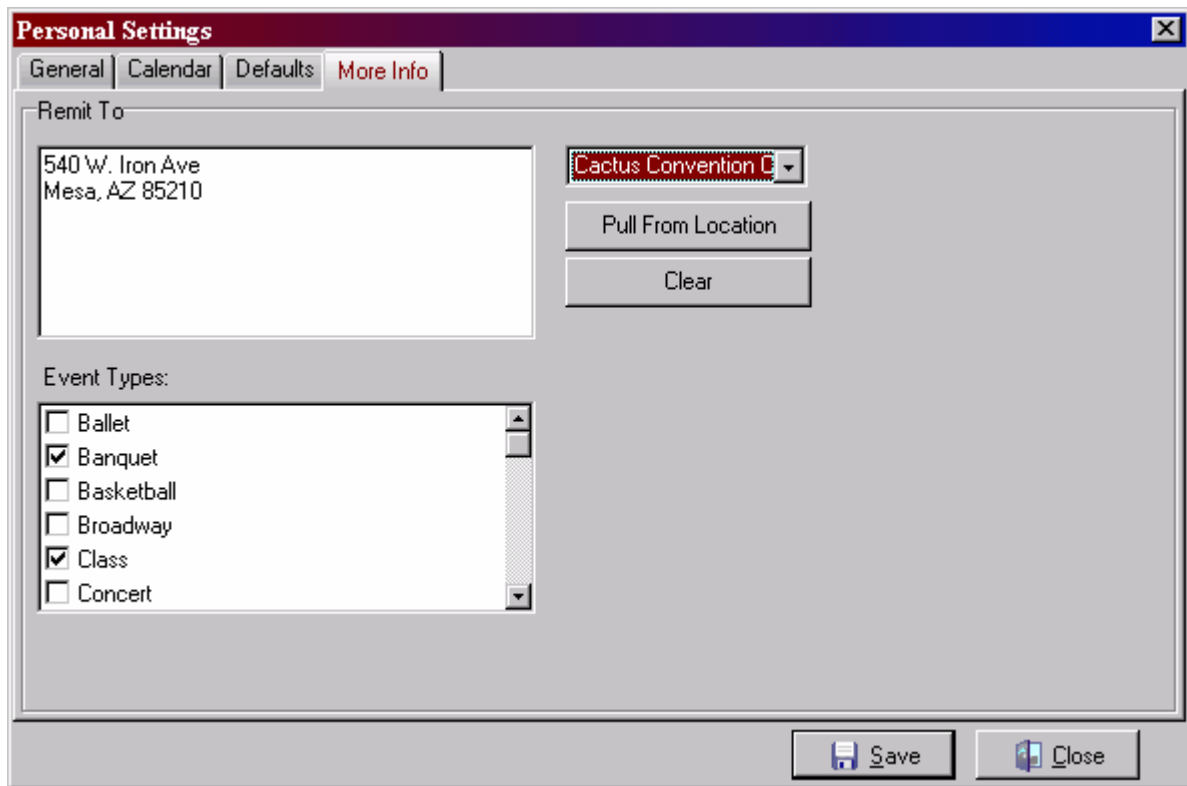
- The Calendar Tab - is divided into two sections: Background Appearance and Event Changes.
- Background Appearance - allows the user to customize the physical appearance of the calendar.
- Event Changes - allows the user to customize the physical cell appearance of the calendar.



- The Defaults Tab - is divided into two sections: Booking and Reports.

Booking section - allows the user to customize certain fields to always be prefilled when booking an event. Also if you check mark the box - Default to Advanced Booking in Fastbooking will always you to open to advanced Booking Window.

- Reports section - allows the user to customize and/or change Logo file to appear on reports within Fastbook.



- The More Info Tab - is divided into two sections: Remit To and Event Types.
- Remit To section - allows the user to customize and select which location to pull Remit To Address from.
- Event Types section - allows the user to customize which event types to choose from when booking an event.

**FASTbook 5.5**

# **Chapter**

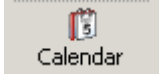


**6**

Calendar

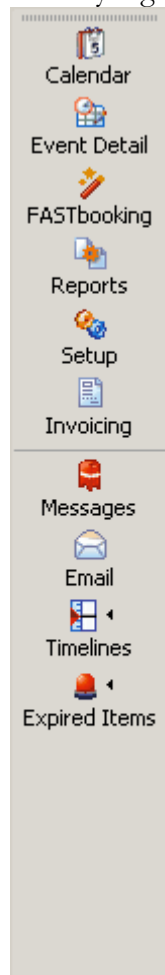
## 6 Calendar

### 6.1 Setting up and Using the Calendar



#### How to setup and use the Calendar

The Monthly Calendar is **FASTbook**'s default desktop. It displays an entire month at one time. The buttons in the tool bar allow you to open other modules such as Event Detail, Time lines, FASTbooking, Reports, Messaging, Expired Items and Setup. The buttons above the calendar change the displayed date. In the table on the bottom of the screen you can view all scheduled events for the currently highlighted date. This is one way of viewing schedule availability.



- To display the previous year, month, or day, use the arrow buttons located on the left side of the date in the toolbar. The previous year button is the farthest button to the left with two solid bars and the arrow pointing to the left. The previous month button shows a solid bar and an arrow pointing to the left. The previous day button has one arrow pointing to the left.

You only need to click on the button once for it to execute.

- To advance a day, a month, or a year, click once on the arrow buttons located to the right side of the date in the toolbar. The next day button has one arrow pointing to the right. The next month button shows a solid bar and an arrow pointing to the right. The next year button has two solid bars and the arrow pointing to the right.
- 
- To quickly move to another month and year, click on the long button which displays the currently highlighted date. This is a 'Go To' button, and pressing it will cause a pop up screen to appear where you can select the month and year you want to display in the calendar.



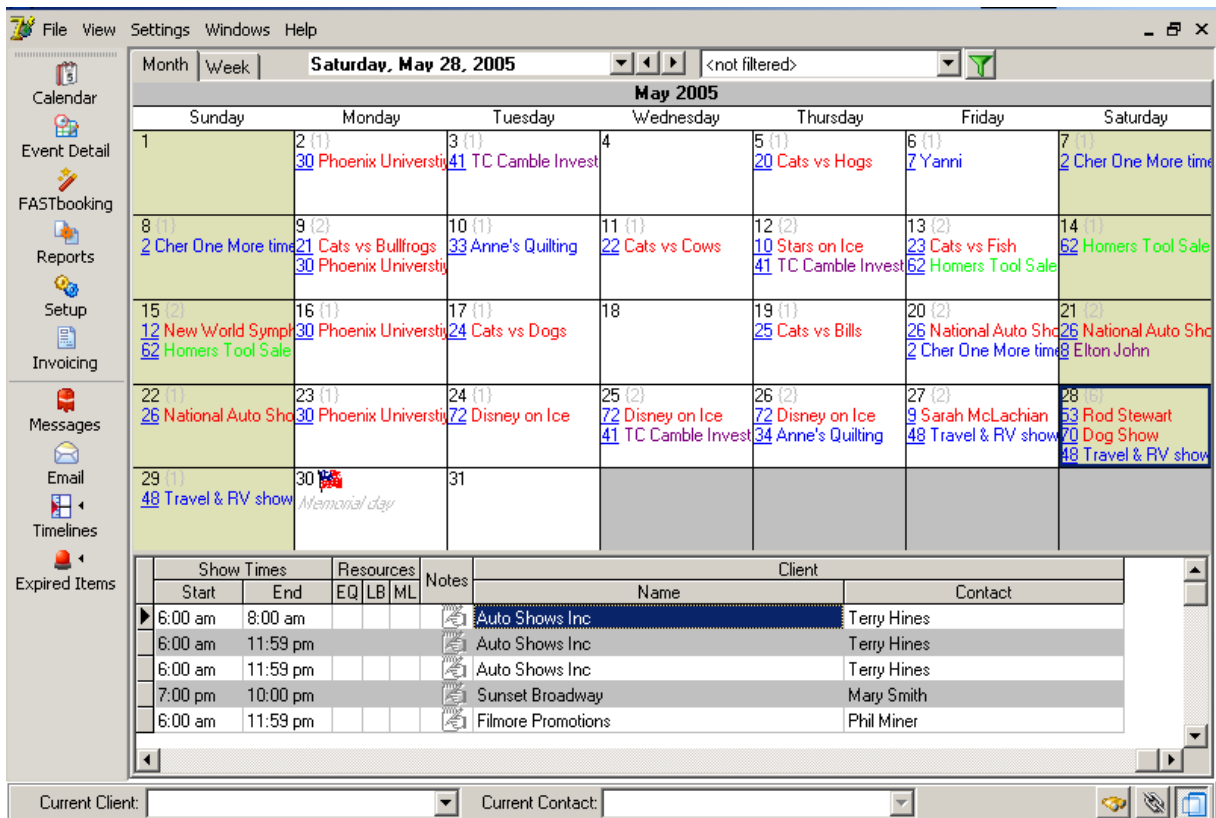
When the calendar first opens, the current date is always highlighted in the Windows highlight color and displayed in the toolbar at the top of the screen. (You can easily change the highlight color in Calendar options; calendar options can be found by doing a right mouse-click at the calendar.)

Each day cell contains various lines of text; the number lines display depends on the size of the calendar. The Calendar displays the Event names or event types for all the Events booked on that day, and the information is arranged by status and order of entry. A summary of details for each event is listed in the table at the bottom of the screen. Event Number, Event Name, Room name, Event Type, Status, Start Time, End Time, (or optionally Show start time and Show end time) and Setup Style are listed. The resources like Equipment, Meals, Labor and Notes, if assigned, will have small check marks in the check boxes. If notes exist for the event, they will be designated with a notepad icon in the box.

Days that have more than three different events are marked with the total number of events on the left side of the day cell.

You can view the additional events not displayed on the calendar by highlighting the day and looking in the table at the bottom of the screen.

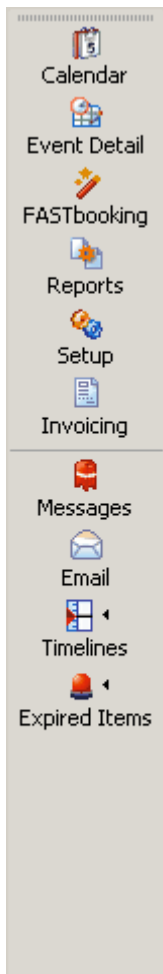




To view information about events on a particular day, click anywhere in a day cell. The color in the day cell will change to the highlight color. The date in the toolbar will change, and the details of the Event in the table at the bottom of the screen will change to the information for the day you selected.

You can also use the right and left arrows on your keyboard to advance or recede one day. Pressing the up or down arrow will highlight the same day in the previous or following week.

From Calendar, you have the option to quickly open the Event Detail module, the Timeline module, the FASTbooking module, the Reports module, the Messages module, the Expired Items Module, and the Setup module by using the buttons in the toolbar on the left side of the screen.



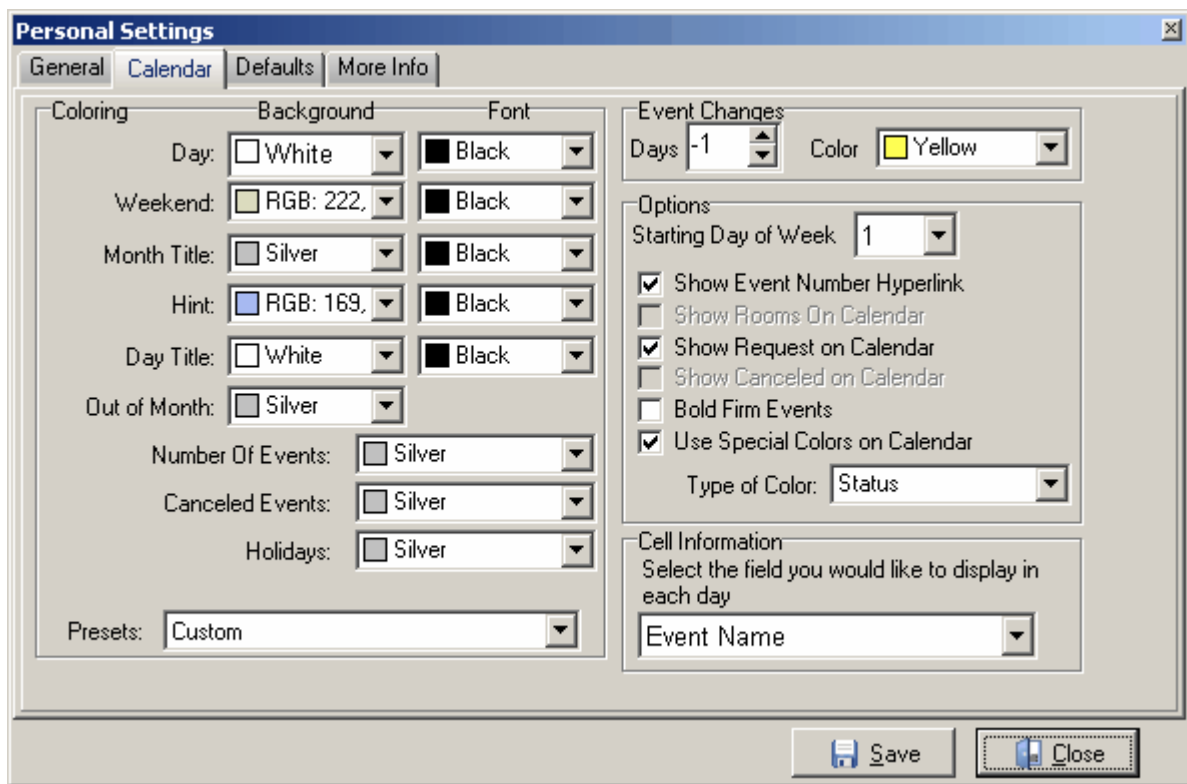
The Event Detail module can also be opened by double-clicking on one of the events in the table at the bottom of the screen.

Number	Event Name	Times		Status	Room	Event Type	Show Times		Reso
		Start	End				Start	End	
6051	New Event	6:00 am	12:00 pm	Firm	Green Room	Comp Services	6:00 am	12:00 pm	
6209	Test Explode Proc	8:00 am	5:00 pm	Tentative	Ballroom B	Concert			
6209	Test Explode Proc	8:00 am	5:00 pm	Tentative	Ballroom C	Concert			
6209	Test Explode Proc	8:00 am	5:00 pm	Tentative	Ballroom A	Concert			✓



**NOTE:** Calendar options allow you to customize your calendar

- With Calendar open, do a right mouse-click to view the drop down box.
- Select Calendar Options by clicking on it. The Calendar Options box will open showing the default Calendar settings.



Set Navigational Days by turning on or off the check boxes; you will see the change displayed on the calendar in the background.

You can also set Dark Days (Days that you don't schedule events).

- Click on the day you wish to shadow and the color you wish to use.
- Make any other color changes you wish to make on your calendar.
- Click on the OK button to save and return to the calendar.



**NOTE:** To Resize your Calendar so that you can see all of your Events at the bottom:

- Using your pointer, grab the base of your calendar and move up or down, or click on your right mouse button to select Splitter Position.
- Increasing the number will increase the size of the calendar and decreasing the number will decrease the size of the calendar.


On some day cells you may see a small image. It is a symbol for a holiday that is setup for your center. If you click in the day cell that contains the symbol, the name of the holiday will be displayed in the toolbar below the date, right next to the image.

## 6.2 Calendar Filters

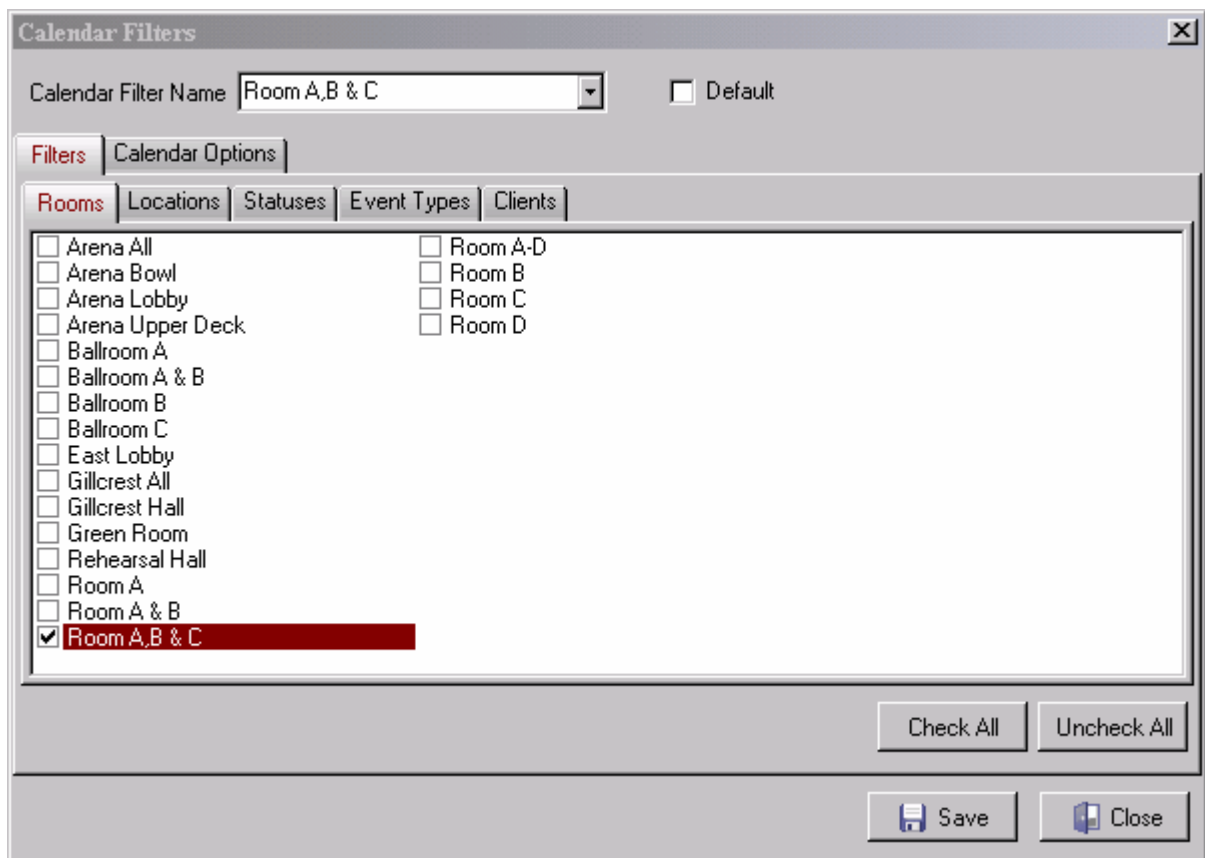
### Using Calendar Filters



**NOTE:** Calendar Filters allow you to customize your calendar view for Rooms, Locations, Statuses, Event Types and Clients and/or combinations.

- With the calendar open, click on the Green Syphon  next to <not filtered> <TAB>.
- Click on the "Filters" <TAB> and by default, the "Rooms" will appear, and by default all rooms are selected.

- Click on the "Uncheck All" box to unselect all rooms.
- Check mark the room or rooms you want to include in the filter.
- For example, let's include Room A, B & C in the filter - select Room A, B & C and then next to "Calendar Filter Name" type a name for that filter. In this example, let's name it same as the selected room: Room A, B, & C, and then click on the "Save" button.



- With the calendar open, click on drop down next to <not filtered> <TAB>.
- Select the newly created filter - in this example, Rooms A, B, & C

The screenshot displays the FASTbook application's calendar interface. The window title is "FASTbook {Event Software Development} - [Calendar]". The menu bar includes "File", "View", "Settings", "Windows", and "Help". The main area shows a calendar for August 2005, with the current date set to Monday, August 01, 2005. The calendar is filtered by "Room A,B & C". A red box highlights the event "60 Phoenix University" on Monday, August 1st. The calendar grid shows events for each day of the week, with event names and IDs listed. Below the calendar is a table with columns for "Notes", "Show Times", "Client", "Times", "Event", "Times", and "Status". The table contains one row of data for the highlighted event. At the bottom of the window, there are fields for "Current Client" and "Current Contact", and a status bar showing "5.5.2.1188 SUPERVISOR" and "0 new message(s)".

Notes	Show Times	Client	Times	Event	Times	Status
	Start	Name	End	Name	Start	
	7:00 pm	Phoenix Univ. Inc.	10:30 pm	Phoenix University	7:00 pm	Firm

- After you have selected a room, the calendar will refresh with the selected filter criteria (e.g. Room A,B & C).

**FASTbook {Event Software Development} - [Calendar]**

File View Settings Windows Help

Month Week **Monday, August 01, 2005** Room A,B & C

**August 2005**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3 (1) 68 T & B Medical New	4	5	6
7	8	9	10 (1) 68 T & B Medical New	11	12	13
14	15	16	17 (1) 68 T & B Medical New	18	19	20
21	22	23	24 (1) 68 T & B Medical New	25	26	27
28	29	30	31 (1) 68 T & B Medical New			

Notes	Show Times	Client	Times	Event	Times	Status
	Start	Name	End	Name	Start	

Current Client: SUPERVISOR Current Contact: [ ]

5.5.2.1188 | 0 new message(s) | C:\FBW\in50\fbdata\fbdata.fdb

# FASTbook 5.5

# Chapter



7

Event Detail



## 7 Event Detail

### 7.1 Overview



## Event Detail

The Event Detail screen is the entry form which allows you to book single events and enter all associated pertinent data.

After the input is processed, the system creates a master record that is unique to all other records. Depending on the number of rooms and the length of time they are booked for, **FASTbook** also creates a variety of records that are associated with the master record.

**Example:** Ten (10) rooms are combined into a group called the "West Wing Conference Center". This group of rooms is then booked for a period of three (3) days. **FASTbook** will create a master record with a system generated Event # as a unique identifier. When the event is processed, **FASTbook**, at your option, breaks down the group into the individual rooms and generates 30 records associated with the master record. This allows you to edit and delete single components while keeping the master record intact.

### 7.2 Components of the Event Detail

#### Components of the Event Detail Screen

The entry form consists of a variety of fields which enable you to enter information about the event. Most fields are optional, but some fields have to be entered in order to complete the booking. These required fields are: Event Name, Event Status, Client Name, Event Type, etc.

The entry form is divided into several sections:

- The upper section contains the main information about the event, such as Event Name, Status, Client Name, and dates that are generated by the system once you have rooms booked.
- In the lower right corner you are able to define certain choices for the event. Select as many check boxes as you like. If you have our optional web calendar or computerized displays by checking the boxes, the event will be posted, and if the event is a private or a public event, you can check the box you want. If you select private, your event will show on the calendar with the event type, not the event name; this is for security purposes.

Event # 6572

General | Event Info | Ticket Totals | Web | Additional Clients | Audits |  Ticklers |  Notes |  Labor

Name: T & B Medical News  
 Client: Thomas Bollon | Contact: Thomas Bollon  
 Event Type: Conference | Location: Conv Ctr  
 Status: Firm | Coordinator: | Event Start & End Times: Start: 07/20/2005 6:00 AM, End: 08/31/2005 11:59 PM  
 Expires: | Contract: |

Options:  Internet,  Displays,  Public,  Private

Auto Explode Groups

Rooms | Equipment | Meals | Labor | Outline | Financial | Custom | Ticklers | Presenter | Attachments | Tickets

Subevent Room (7)

EQ	ML	LB	NT	Start Date	Day	Start Time	Setup	Show Start	Show End	Tear Dn	End Time	Subevent Type	Setup Style
				07/20/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	
				07/27/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	
				08/03/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	
				08/10/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	
				08/17/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	
				08/24/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	
				08/31/2005	Wed	6:00 AM		6:00 AM	11:59 PM		11:59 PM	Conference	

Auto Explode Groups

- The bottom part, graphically separated from the Event Detail part by a Sub Event toolbar, contains all Sub Event and additional event information. This form has several tabs on the bottom to book resources and enter other event information.



**NOTE:** The bottom part of the Event Detail screen has 11 tabs; Rooms, Equipment, Meals, Labor, Outline, Financial, Custom, Ticklers, Presenter, Attachments and Tickets. The TABS allow for easy navigation between resources, and because the tab you are working on is always highlighted in the screen color, there will never be a doubt about what resource you are working on.

#### The Buttons in the Event Toolbar


The Event Detail and the Resource sections have their own navigational toolbar. The top toolbar only works with the Event Detail screen, the bottom part only works with the tab screens.





## 7.2.1 Navigator Buttons


### The Navigator Buttons


Use these buttons as tools to move forward and backward within individual databases. Each one of the top row buttons operates on the field in the main screen where the cursor is located. Each one of the bottom row buttons operates on the fields in the tab forms. The top buttons will not work for the fields and tables in the tab section, and the bottom row buttons will not operate in the Main Event Detail screen.


 The "**First Record**" button takes you to the first record in the database, and makes it the current record. It has an arrow pointing to a solid vertical bar on the left side. When inside a table in one of the tab forms, the cursor will be moved onto the first line.


 The "**Previous Record**" button takes you to the record immediately before the record shown on screen, and makes it your current record. This button has an arrow pointing to the left.


 The "**Next Record**" button takes you to the record after the record is displayed on the screen. It moves you forward one record in the database. This button has an arrow pointing to the right.


 The "**Last Record**" button takes you to the last record in the database, and makes it your current record. It has an arrow pointing to a solid vertical bar on the right side. When in a tab form, the cursor will be moved to the last row in the grid.


 The "**Delete Record**" button will delete the information currently on the screen. In Event Detail, the entire event, including Event Number and the Sub Event(s) with all be attached and Resources will be deleted. In any of the Sub Event resource tabs, the currently highlighted row will be deleted.


 The "**New Record**" or "**Insert Record**" button saves the information currently on the screen and then clears the screen, or, in any of the tabs in a table, inserts an empty line so you can attach a new record.

 The "**SAVE**" icon is used whenever you have completed a record and wish to save it to the database. When the cursor is located inside a table in the meals or equipment tab, you only need to enter the quantities required and then press the Save button to post your record. **FASTbook** calculates all charges and moves the cursor onto the next empty line.


 The "**Cancel Changes**" button will undo all changes you made to a record. **But**, once you click into a table, all entries made into fields in the main screen are automatically saved, so the 'Cancel Changes' button will **not** work.


 The **"Refresh"** button refreshes event information with the latest changes for that specific event.

 The **"Zoom"** button is used to bring up the Insert Client Information, or to Zoom in on a Subevent to see the details.


 Click on the **"Search"** button if you need to find an event or information for an event. The list of items you are able to search in Event Detail is large. (To find out how to use the search pop-up, look up the Introduction section in this manual.)

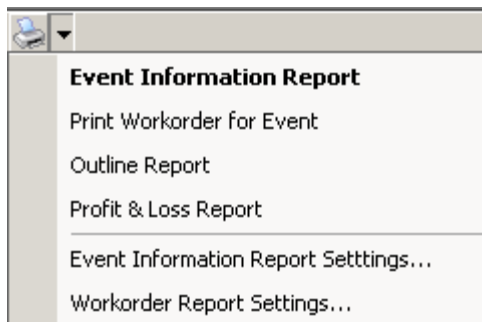
 The **"Notes"** button allows you to add comments about the event and any of the rooms, equipment, meals and labor.

 The **"Word Processor"** button opens the Word Templates folder where the merged documents are stored.

 The **"Copy event"** button will copy a complete event, room, equipment, meal, and labor information to a new event record.

 The **"Lock"** button lock/unlocks an event.

 Click on the **"Printer Button"** to print an Event Information report.




## 7.3 Scheduling an Event

### Scheduling An Event

The Event Scheduling and Editing screen is accessible from the Calendar by clicking on the Events Detail icon in the main toolbar.

To go to a particular event, first highlight the day it's on, and then locate it in the grid below the calendar. Click on the event or use your mouse to click on the Event Detail button at the left side of the calendar.

The Event Detail window opens. The cursor is located on the Event Name field.

 Click on the INSERT button to clear the screen to add a new event.

Type in the Event Name and press <TAB>.

- From the drop down list, select the previously setup client. Press <TAB> or <ENTER>.



**NOTE:** When the cursor is on the client field, the ZOOM button in the tool bar is highlighted and active.

The Client setup screen pops up if you click on the ZOOM.



If you already had a client name highlighted when pressing the ZOOM button, you will be able to edit this client. You will not be able to add a new client.

- If the Client Name field was empty when you pressed the ZOOM button, you will be able to add a new client. You will not be able to edit other clients.
- Select the appropriate Client Contact from the pick list. Press <TAB>.

From the drop down list, select a previously defined status for the event and press <TAB>.

If you know the statuses by heart, you can type in the first letter of the one you need to book. If you have several statuses starting with the same letter, add additional letters until the appropriate status appears.

If the event is not a FIRM one and you entered a tentative expiration date in status setup, **FASTbook** will calculate the expiration date and enter it automatically. In a Firm event, the expiration date field will be blank. Press <TAB>.

- From the drop down list, select a previously defined Event Type and press <TAB>.

If you know the event types, you can type in the first letter of the one you need to book. If you have several event types starting with the same letter, add additional letters until the appropriate status appears.

- Enter the Coordinator's Name and press <TAB>.
- Enter a Contract Number for the Event. Press <TAB>.

- If your center has multiple sites, enter the Location for the Event. Press <TAB>.
- **FASTbook** will put the initials of the person who first created the event in the Booked By field on the Event Info tab. Press <TAB>.
- Decide whether or not you want the event to be broadcasted to FASTbook Online or to a Computerized Display; if it is a Public or a Private event, click on the appropriate check boxes. (If applicable).



**NOTE:** If the event is marked 'Private,' you will not see any detailed information about the event. Only the Supervisor will be able to see details.

**FASTbook** will now stamp this record with the date and time created and updated for easy tracking and later reference.

## 7.4 Scheduling a Room for an Event

### Scheduling a Room for an Event

Using the Room Scheduler located at the bottom of the Event Detail screen allows you to quickly book a room or a group of rooms. You are also able to edit already booked rooms, by changing dates, times, setup styles, and rates. You may even change the room to a different one in case you discover that the room you initially booked is too small, or is needed for another event, etc. Follow the described steps for easy scheduling or editing.

- Enter the Start Date for the first Sub Event. Click pointer into Sub Event start date, then click the down arrow; a calendar will appear, select start date with pointer.

**FASTbook** will fill in the name of the weekday for easier reference. Press <TAB>.

- Enter the Start Time for the first Sub Event. Press <TAB>.



**NOTE:** Times need to be entered as follows: 9:00AM or 11:30PM.

- From the drop down list, pick the required Setup time by clicking on the appropriate number (Optional). You can also type in a number, for example '3'
- **FASTbook** will pick the first setup time starting with the number 3, which is 30. The time you allow for setup is now 30 minutes. If you type '3' again, **FASTbook** will schedule a '300' minute setup. Press <TAB>.



**NOTE:** Setup times and tear down times are booked in 15 minutes increments. If you

allow at least 30 minutes for setup, it will be displayed on the timeline preceding the status color of the room as a shaded version of the color.

- Enter the Show Start Time for the first Sub Event. Press <TAB>.
- Enter the Show End Time for the first Sub Event. Press <TAB>.
- From the drop down list, pick the required Tear down time by clicking on the appropriate number. (Optional). You can also type in a number, for example '1'. **FASTbook** will pick the first tear down time starting with the number 1, which is 15. The time you allow for a tear down is now 15 minutes. If you type '1' again **FASTbook**, will schedule a '105' minute tear down. Press <TAB>.
- Enter the End Time for the first Sub Event. Press <TAB>.
  
- From the drop down list, pick the Event Type for that Sub Event by clicking on it. Press <TAB>.

If you know the event types, you may type the first letter of the ones you need to book. If you have several event types starting with the same letter, add additional letters until the appropriate event type appears in the field.

- From the drop down list, pick the Setup Style for the room by clicking on it. Press <TAB>.

Again, if you know the setup styles, type the first letters of the one you need to book. If you have several setup styles starting with the same letter, add additional letters until the appropriate setup style appears.

- From the drop down list, pick the most suitable room by clicking on the room name. Press <TAB>.

If you know the room you want to book, enter the first letter of the room name. If the room is not available, the field will either stay empty, or **FASTbook** will find the next room starting with the letter you typed.



**NOTE:** **FASTbook** has already narrowed the number of rooms and groups down to the ones that are visible in the list. You will only see rooms that are available for the status, location, and setup style you have selected.

- From the drop down list, select the Rate that you want to charge for the room. Press <TAB>.



**NOTE:** FASTbook has already narrowed down the selection list of rates to the ones that specifically apply to the client.

FASTbook will now book the room and apply the appropriate rate. The Date and Time field in the upper left corner will be updated for record tracking purposes. If the Rate is left blank, the user can advance to the next field and manually enter room charge.

After FASTbook has placed an amount into the room charge field, the cursor will be in the Start Date field of a new line in the table, and then additional rooms can be added. If the cursor is not on an empty line, press the INSERT button located in the bottom part of the navigational toolbox to add a new line to the table.

- Click on the INSERT button located in the upper part of the navigational toolbox to clear the screen and get ready to enter the next event.



**NOTE:** If you have entered a date that is set up as a Holiday, FASTbook will notify you as soon as you are finished entering the date. If booking is allowed on that holiday, you can enter the start time for the Sub Event. If booking is not allowed, or only the Supervisor is able to book, a pop up message will tell you.



**NOTE:** If you have scheduled Room Groups and need to explode them, place the cursor on the Start Date for the Room Group you want to explode and click your right mouse button to pop up a menu. Select explode group to explode all the rooms in the group you selected.



If you need to make comments about any of the rooms you have scheduled, highlight the room and then press the NOTEPAD button. A screen will pop up, leaving you sufficient room to add comments. (To find out how to use the notepad, look up the Introduction section in this manual.)

To show you that there are notes for a room, FASTbook will place a small Notepad inside the Room tab.

- Click on the Search button if you need to find an event or information for an event. The list of items you are able to search in Event Detail is large. (To find out how to use the search pop-up, look up the Introduction section in this manual.)

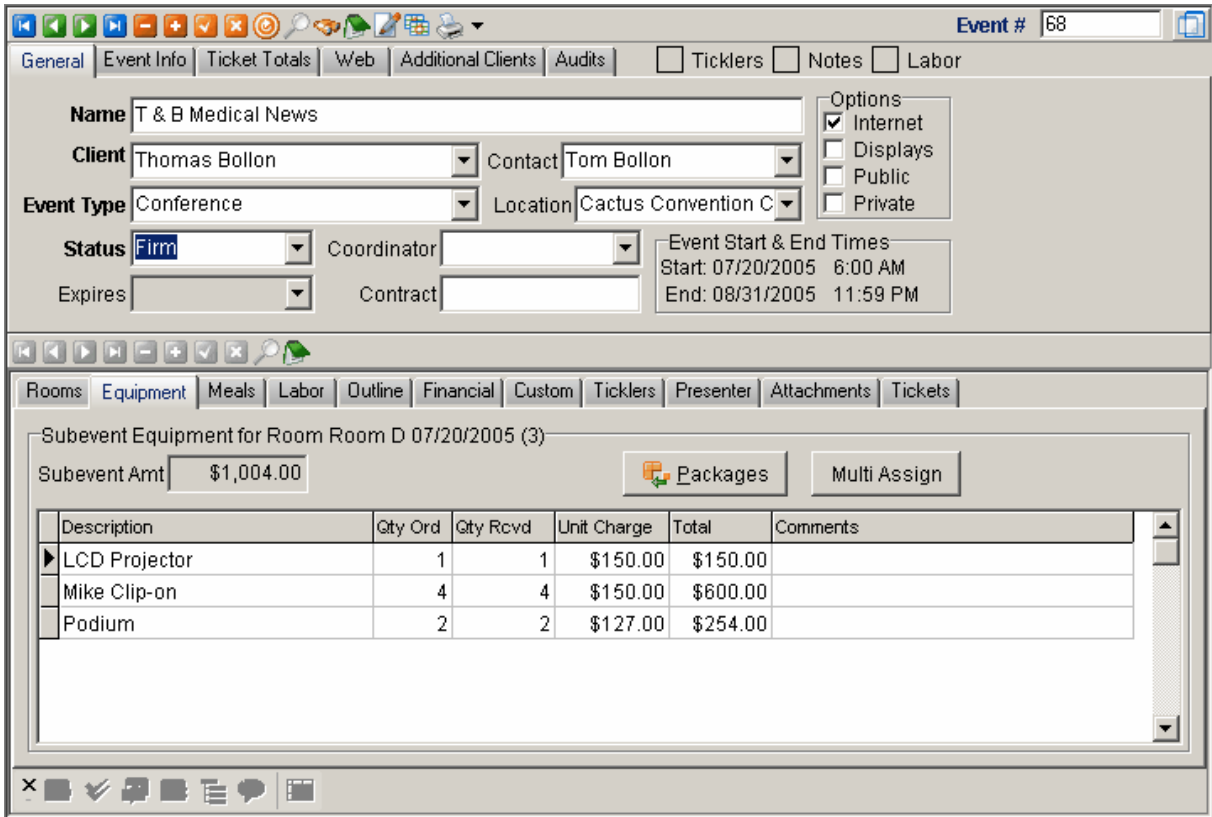


### 7.5 Scheduling Equipment for a room

#### Scheduling Equipment for a Room

The Equipment Scheduling tab allows for the easy and fast assigning of equipment and equipment packages to one room at a time. You can edit and add items.

- Place the cursor on the Start Date for the room you want to book Equipment for and click once, so that the date is highlighted.
- Click on the Equipment tab located on the bottom part of the Event Detail screen right next to the Rooms tab. The equipment page opens.
- From the drop down list, select a previously setup piece of equipment. Press <TAB>.
- Enter the number required for that piece of equipment. Press <TAB>.
- Press <TAB> to skip the Quantity received field.



**NOTE:** If the quantity you requested is not available, **FASTbook** will tell you that your order is only partially filled and will then display how many are received in the Quantity received field. If the number in the Quantity received field is less than the number in the Quantity ordered field, then you do not have enough of the equipment on hand to cover the request.

- Press <TAB> to skip the Quantity not returned field. This field becomes important after the event, when you are able to go back into the equipment tab and enter the numbers for equipment pieces that were broken or were not returned for other reasons.

**FASTbook** will automatically place the unit cost that was setup in the equipment master database, in the next field.

- To allow for more flexibility, you are able to edit the cost for equipment.
- Press <TAB> so that you can enter any equipment specific comments in the comment field.
- Press <TAB> so that the system can calculate the total cost for the piece of equipment you booked.

**FASTbook** will now book the piece of equipment and reflect the total cost in the Sub Event Total and the Event Total field. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes.

After **FASTbook** has placed an amount into the equipment total field, the cursor will move to the Description field of a new line in the table where you can add additional equipment.

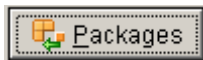


**NOTE:** **FASTbook** allows you to add additional equipment of the same type, at a different price. Just add the same equipment twice and edit the cost of the second selection.

## 7.5.1 Scheduling Equipment Packages for a room


### Scheduling Equipment Packages for a Room


- Place the cursor on the Start Date for the room you want to book Equipment for and click once so that the date is highlighted.
- Click on the Equipment tab located on the bottom part of the Event Detail screen right next to the Rooms tab. The equipment page opens.



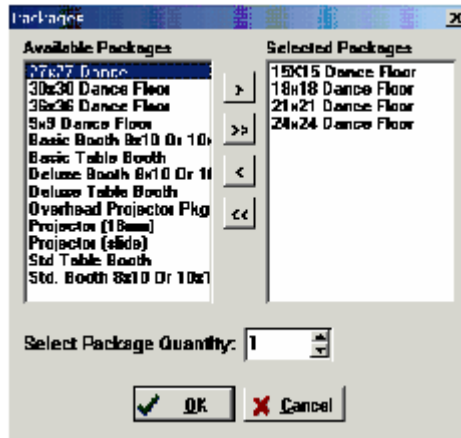
Click on the Packages button to open a pop up window. In the table on the left you will see all your center's equipment packages listed.

- Use the arrow buttons between the two tables to move the packages into the table to the right.

 If you have an equipment package selected in the left table and then click on the button that has one arrow pointing to the right, the package will be moved into the right table.

 If you click on the button that has two arrows pointing to the right, all equipment packages will be moved into the right table.

- ◀ If you select a package in the right table and you don't want to book it, simply press on the button with the arrow pointing to the left to return the package into the inventory table.
- ◀◀ If you want to return all packages in the right table into the inventory table to the left, press the button with two arrows pointing to the left.



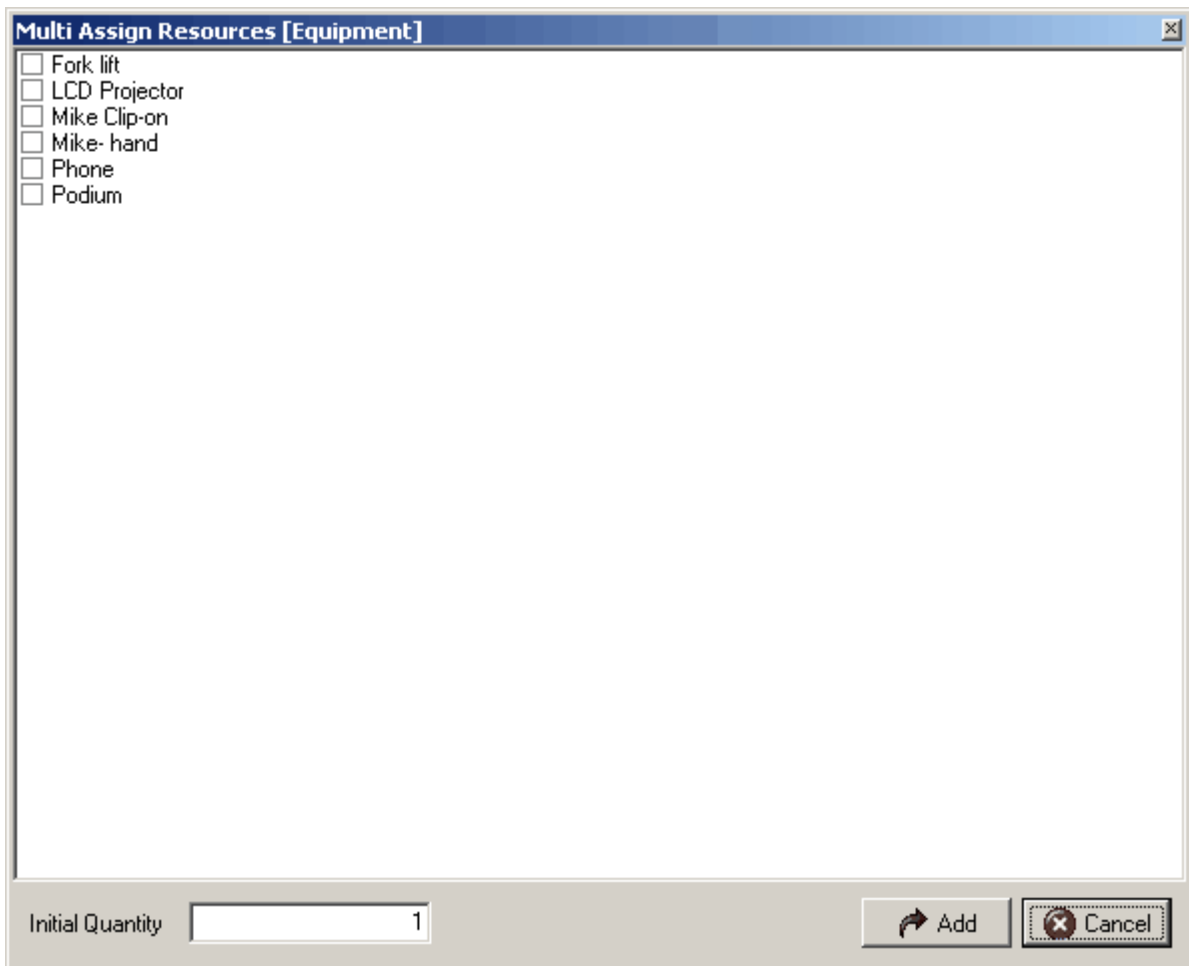
- Once you select all packages you wish to book into the right table, select the number of packages you need by either typing it in the Quantity field, or use the spin buttons on the right side of the field for your convenience.
- Press the OK button if your selection is correct.

**FASTbook** will now book the Equipment Package. Every single piece of Equipment will be listed in the Equipment table, and quantities and amounts will be calculated. The total cost will be reflected in the Sub Event Total and the Event Total field. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes.

- Press Cancel to cancel your entries.

Multi Assign

Click on the Multi Assign button to open a pop-up window. In the table on the left, you will see all your center's equipment resources listed.



- Once you have check-marked all resources you need to book, select the number of equipment you need by typing it in the Quantity field, and click on the "Add" button.

**FASTbook** will now book the Equipment. Equipment will be listed in the Equipment table, and quantities and amounts will be calculated. The total cost will be reflected in the Sub Event Total and the Event Total fields. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes



If you need to make comments about the Equipment you have scheduled, press the Notepad button. A screen will pop up, leaving you sufficient room to add comments. (To find out how to use the notepad look up the Introduction section in this manual.)

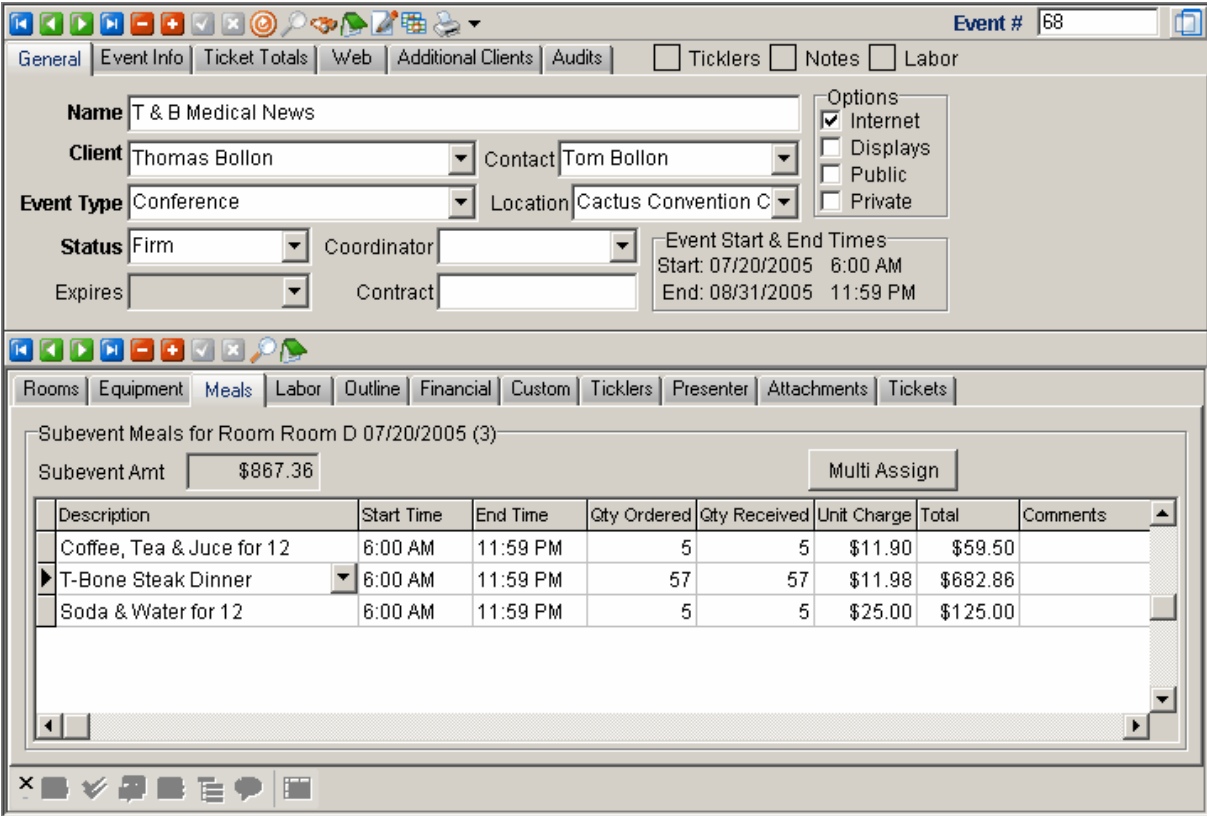
To show you that there are notes for equipment, **FASTbook** will place a small Notepad inside the Equipment tab.

## 7.6 Scheduling Meals for a room

### Scheduling Meals for a Room

The Meal Scheduler allows you to schedule catering items for meal functions during an event whether the catering is done in-house or supplied by an outside vendor. Additionally, the Meal Manager enables you to keep track of associated charges, the start and end times for each meal function, and whether or not to defer billing.

- Place the cursor on the Start Date for the room you want to book meals for and click once, so that the date is highlighted.
- Click on the Meals tab located on the bottom part of the Event Detail screen right next to the Equipment tab.  
The meals page opens.
- From the drop down list, select a previously setup meal. Press <TAB>.
- Type in the Quantity ordered. Press <TAB>.




**FASTbook** will place the cost for a single meal into the unit cost field. The Sub Event Start and End Times are also defaulted into the appropriate fields.

- Change the cost for a single meal in the Unit Cost field (if necessary). Press <TAB>.
- Change the start and end time for the meal . Press <TAB>.

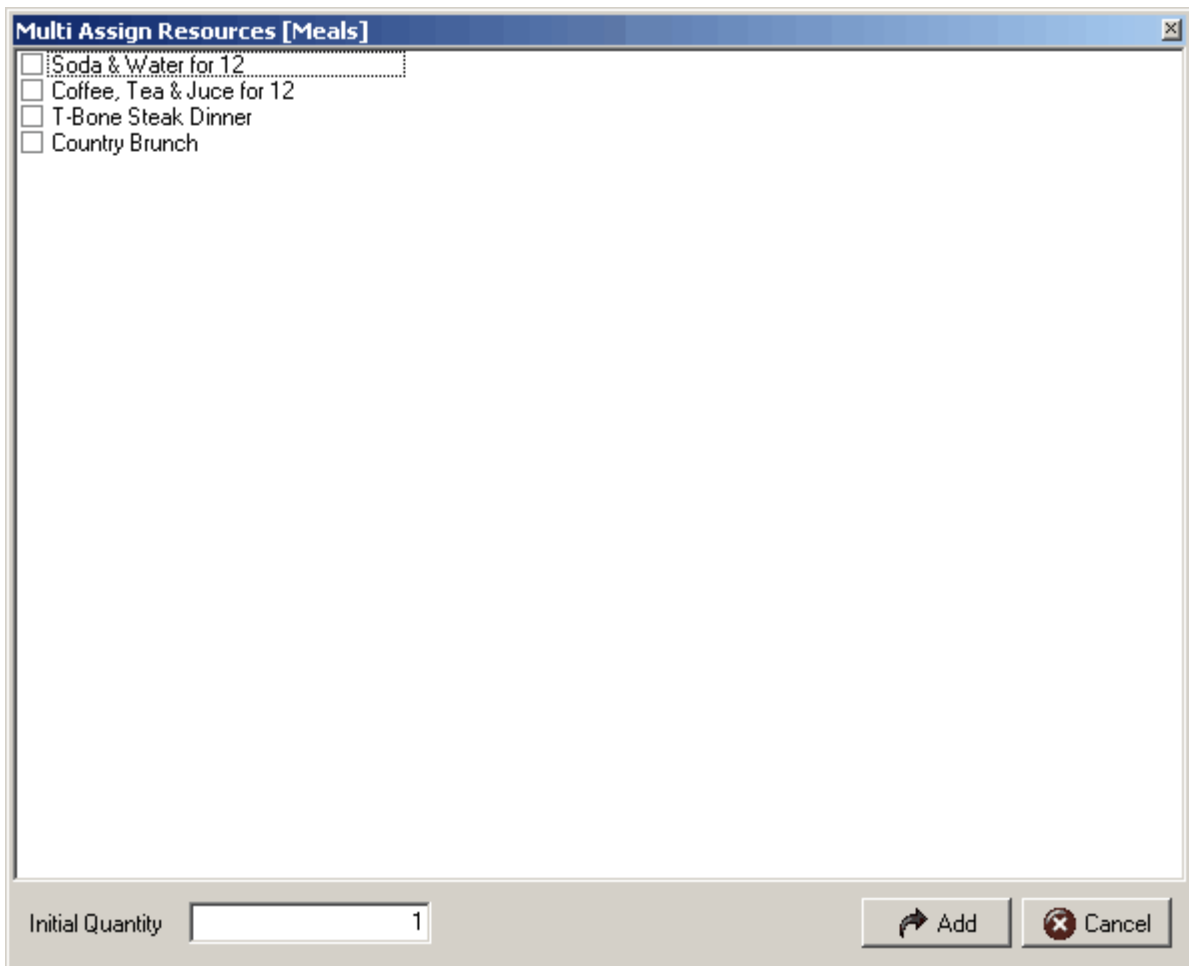
**FASTbook** will calculate the total for the meal, and then update the cost in the Sub Event meal total, and the event total field. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes.

After **FASTbook** has placed an amount into the meals total field, the cursor will be in the Description field of a new line in the table where you can add additional meals for a Sub Event.

 If the cursor is not on an empty line, press the INSERT button located in the bottom part of the navigational toolbar to add a new line to the table.

A rectangular button with a light gray background and a thin black border. The text "Multi Assign" is centered on the button in a dark gray font.



Click on the Multi Assign button to open a pop up window. In the table on the left, you will see all your centers' meals resources listed.



Multi Assign Resources [Meals]

- Soda & Water for 12
- Coffee, Tea & Juice for 12
- T-Bone Steak Dinner
- Country Brunch

Initial Quantity

 Add  Cancel

- Once you've check marked all resources you need to book, select the number of meals you need by typing it in the Quantity field and click on the "Add" button.

**FASTbook** will now book the Meals. Meals will be listed in the Meals table, and quantities and amounts will be calculated. The total cost will be reflected in the Sub Event Total and the Event Total field. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes



If you need to make comments about any of the meals you have scheduled, press the Notepad button. A screen will pop up, leaving you sufficient room to add comments. (To find out how to use the notepad, look up the Introduction section in this manual.)

To show you that there are notes for a room, **FASTbook** will place a small Notepad inside the Room tab.

## 7.7 Scheduling Labor for an Event

### Scheduling Labor for an Event

The Labor Scheduler allows you to assign personnel required for operations relating to an event. The Labor Manager uses the data previously saved in the Labor, and Labor Positions & Rates database, located in the setup section of **FASTbook**.

- Place the cursor on the Start Date for the room you want to book labor for and click once so that the date is highlighted.
- Click on the Labor tab located on the bottom part of the Event Detail screen, right next to the Meals tab. The labor page opens.

Event # 68

General Event Info Ticket Totals Web Additional Clients Audits  Ticklers  Notes  Labor

Name T & B Medical News

Client Thomas Bollon Contact Tom Bollon

Event Type Conference Location Cactus Convention C

Status Firm Coordinator Expires Contract

Options  
 Internet  
 Displays  
 Public  
 Private

Event Start & End Times  
 Start: 07/20/2005 6:00 AM  
 End: 08/31/2005 11:59 PM


Rooms Equipment Meals Labor Outline Financial Custom Ticklers Presenter Attachments Tickets

Room Subevent Labor for Room Room D 07/20/2005 (4)  
 Schedule Labor Multi Assign

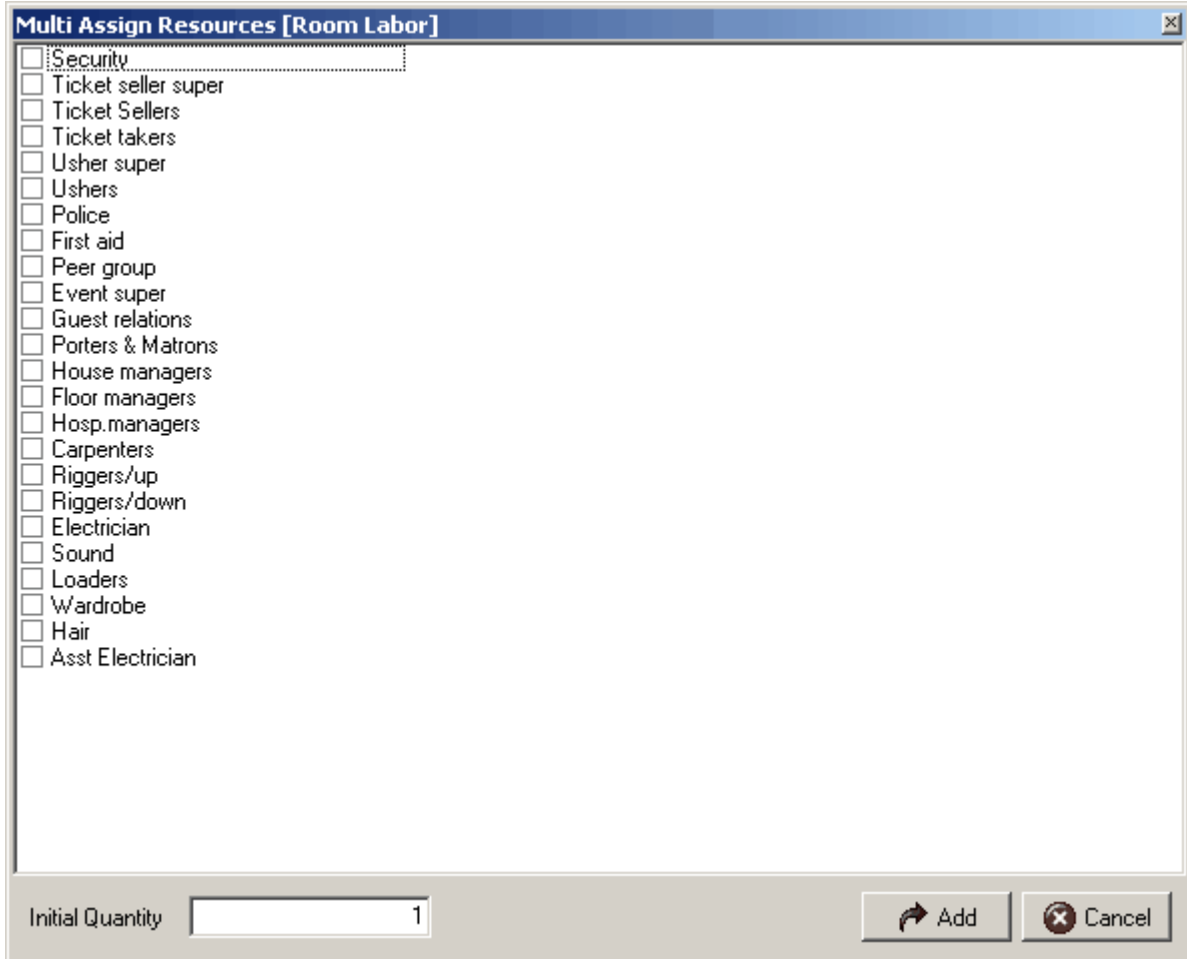
Position	Start	End	Qty	Rcvd	Hrs1	Hrs2	Hrs3	HrsOT	Flat Rate	Total	Comments
Asst Electrician	6:00 AM	11:59 PM	4	4	6.00	0.00	0.00	0.00	\$0.00	\$349.68	
Electrician	6:00 AM	11:59 PM	2	2	6.00	0.00	0.00	0.00	\$0.00	\$284.04	
Carpenters	6:00 AM	11:59 PM	2	2	8.00	0.00	0.00	0.00	\$0.00	\$288.00	
Event super	6:00 AM	11:59 PM	1	1	9.00	0.00	0.00	0.00	\$0.00	\$180.00	

- Select Room or Event Labor from the two tabs on the left side of the screen. Press <TAB>.
- From the drop down list, select a previously set up position. Press <TAB>.
- Enter the number required for that position. Press <TAB>.
- Click on the Labor Icon at the right side of your screen (optional) and select the Employees that you wish to schedule for this Event and click on OK; this will fill in the quantity received. You may now <TAB> to the next line and enter the next position. If you are not using the optional Employee scheduler, simply enter the quantity received and the Number of hours worked. You may now <TAB> to the next line and add your next position.
- Click on Post Edit after entering all of the Labor.





Click on the Multi Assign button to open a pop up window.  
In the table on the left you will see all of your centers' labor resources listed.



Multi Assign Resources [Room Labor]

- Security
- Ticket seller super
- Ticket Sellers
- Ticket takers
- Usher super
- Ushers
- Police
- First aid
- Peer group
- Event super
- Guest relations
- Porters & Matrons
- House managers
- Floor managers
- Hosp.managers
- Carpenters
- Riggers/up
- Riggers/down
- Electrician
- Sound
- Loaders
- Wardrobe
- Hair
- Asst Electrician

Initial Quantity

- Once you have check marked all of the resources you need to book, select the number of meals you need by typing it in the Quantity field, and click on the "Add" button.

**FASTbook** will now book the Labor. Labor will be listed in the Labor table, and quantities and amounts will be calculated. The total cost will be reflected in the Sub Event Total and the Event Total field. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes

**FASTbook** will now book the Labor. Labor will be listed in the Labor table, and quantities and amounts will be calculated. The total cost will be reflected in the Sub Event Total and the Event Total fields. The Date and Time fields in the upper left corner of Event Detail will be updated for record tracking purposes.



If you need to make comments about the Labor you have scheduled, press the Notepad button. A screen will pop up, leaving you sufficient room to add comments. (To find out how to use the notepad look up the Introduction section in this manual.)

To show you that there are notes for Labor, **FASTbook** will place a small Notepad inside the Labor tab.



**Labor Scheduling**

Labor Requested Show All Requests for this Event.

Room	Position	Date	Start Time	End Time	Requested
Room D	Asst Electrician	07/20/2005	6:00 AM	11:59 PM	4
Room D	Electrician	07/20/2005	6:00 AM	11:59 PM	2
Room D	Carpenters	07/20/2005	6:00 AM	11:59 PM	2
Room D	Event super	07/20/2005	6:00 AM	11:59 PM	1

Employees Scheduled Requested: 4 Assigned: 4 Needed: 0

Employee	Date	Start	End	Position
Bill Jackson	07/20/2005	6:00 AM	11:59 PM	Asst Electrician
Matt Downer	07/20/2005	6:00 AM	11:59 PM	Asst Electrician
Sam Smith	07/20/2005	6:00 AM	11:59 PM	Asst Electrician
Randy Tim	07/20/2005	6:00 AM	11:59 PM	Asst Electrician

Navigation: [Back] [Left] [Right] [Next] [Add] [Remove] [Check] [Close]

Close

## 7.8 Entering Financial Information for an Event

### Entering Financial Information for an Event

- Click on the Financial tab located on the bottom part of the Event Detail screen right next to the Outline tab.

The financial information page opens.

In the Resource Charges section, the charges for booked resources are already forwarded from the Sub Event total field in each resource screen. The total already paid will be displayed.

**FASTbook** also displays the sum of all event charges. You will not be able to edit those fields.

- If the Client Category is changed for this event, you can make a temporary change (Optional). Press <TAB>.

Event # 68

General Event Info Ticket Totals Web Additional Clients Audits Ticklers Notes Labor

Name T & B Medical News

Client Thomas Bollon Contact Tom Bollon

Event Type Conference Location Cactus Convention C

Status Firm Coordinator

Expires Contract

Options

- Internet
- Displays
- Public
- Private

Event Start & End Times

Start: 07/20/2005 6:00 AM

End: 08/31/2005 11:59 PM

Rooms Equipment Meals Labor Outline **Financial** Custom Ticklers Presenter Attachments Tickets

General Info

Event Financial Information / Charges

Client Category For-Profit PO Number:

Room Charge	Equipment	Labor	Meal	Resource Total
\$12588.33	\$1004.00	\$752.04	\$867.36	\$15211.73

Other Costs \$0.00

**Event Total** \$15211.73

Total Received \$0.00

Remaining \$15211.73

Payments

Invoices

To set payment or deposit ticklers or enter payments, click on the Payments tab on the left side of the screen. In the payments table you can set payments or deposit ticklers or enter all deposits and payments made. They will be carried over to the invoice module.

- Enter the Payment type (Optional). Press <TAB>.
- Enter the Date payment is due (Optional). Press <TAB>.
- Enter the Amount due (Optional). Press <TAB>.
- From the Assigned to drop down box, select the person you want to receive the tickler notification. (Optional). Press <TAB>.

Payment Type	Payment Due	Amount Due	Assigned To	Date Paid	Amount Paid	Payment Method	Reference
* Payment	04/26/2005	\$4,000.00	ALICE	04/27/2005	\$4,000.00	check	



**NOTE:** If you don't enter any payments into the table, you need to press the SAVE button to save the record.

- If you are entering the Payments or Deposits, the Payment or Deposit amount will be carried over to the Invoice module.
- Enter the Date you received the Payment or Deposit (Optional). Press <TAB>.
- Enter the Payment or Deposit Amount (Optional). Press <TAB>.
- Enter the Type of Payment that was made (Optional). Press <TAB>.
- Enter a reference or description for the payment (Optional). Press <TAB>.

## 7.9 Entering Information in User Definable Fields

### Entering Information In User Definable Fields

- Click on the Custom tab located on the bottom part of the Event Detail screen right next to the Financial tab.

Rooms	Equipment	Meals	Labor	Outline	Financial	Custom	Ticklers	Presenter	Attachments	Tickets
Deal	<input type="text"/>									
Split	<input type="text"/>									
Bar Splits	<input type="text"/>									
Total Net	\$ <input type="text"/>									
Novelty split	<input type="text"/>									
Parking split	<input type="text"/>									

- Click in the first User Definable field and enter your customized item. The field is labeled with the item you have previously setup in the 'User Definable' screen in Setup's Center Profile (These fields are User Defined 1 thru 24). Press <TAB>.
- Enter the second User Defined item. Press <TAB>.
- Press the "Save" or Post edit button to save changes.

## 7.10 Assigning ticklers to Events

### Assigning Ticklers To Events

Ticklers are meant as reminders of the tasks associated with a particular event.

- Click on the Ticklers tab located on the bottom part of the Event Detail screen right next to the Custom tab.

Description	Action	Due Date	Assigned To
Event Tickler	Send Thank You Note	07/25/2005	MARY
	Notify Catering	06/29/2005	KEITH
	Recieve Contract Back	06/05/2005	ALICE
	Notify Operations	07/09/2005	Opps
	Check Insurance	07/05/2005	ALICE
	Send Contract	05/21/2005	ALICE

- Pick the first Tickler you want to assign to the event from the drop down list in the left table. Press <TAB>.
- Press <TAB> if you want to assign additional Ticklers, otherwise click on the SAVE button.
- The Tickler Actions will be immediately displayed in the table to the right.
- The name of the person responsible for the tickler is shown in the second column, the Due Date in the third one.

**NOTE: FASTbook** has automatically converted the days before and after the event into proper dates. The Days Away were previously defined in the 'Ticklers database in Setup.

Once Ticklers are assigned to an event, you can come back to this screen anytime and fill in the Date a Tickler Action was completed and by whom.

- Enter the Date the Action was completed. Press <TAB>.
- Pick the person who completed the task from the drop down list. Press <TAB> or click on the SAVE button.

## 7.11 Scheduling a Presenter for a Room

### Scheduling A Presenter For A Room

- Place the cursor on the Start Date for the room you want to book a presenter for and click once, so that the date is highlighted.
- Click on the Presenter tab located at the bottom part of the Event Detail screen right next to the Ticklers tab. The presenter page opens.



**NOTE:** There can be only one presenter per Sub Event.

- Enter the presenter's name. Press <TAB>.
- Mark all check boxes in the audio/visual needs section that apply.



**NOTE:** The Check boxes in the Audio/Visual section are user definable.

To customize the wording, you have to open Setup and make your changes in the Center Profile's 'User Defined II' screen.

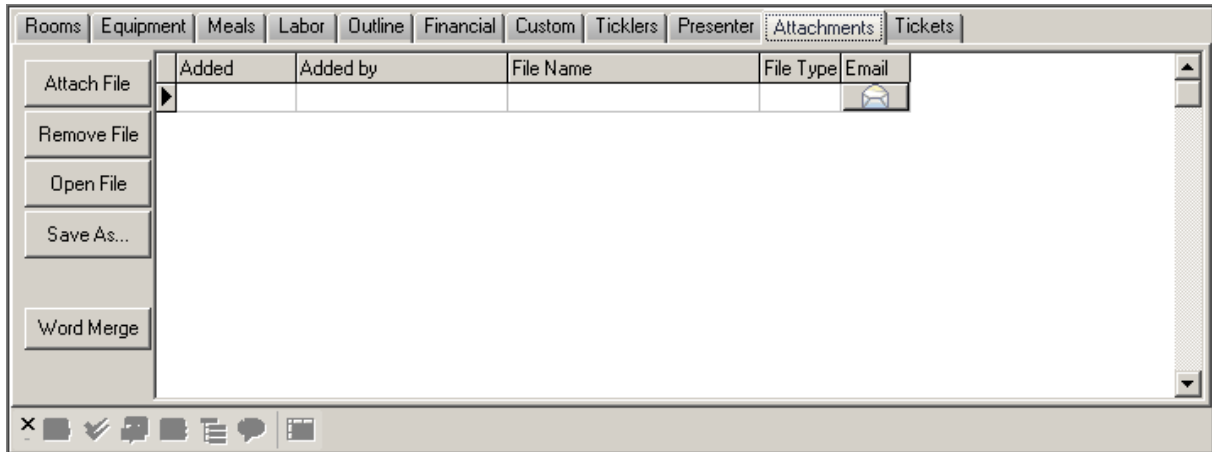
- Mark all check boxes in the catering needs section that apply.
- Click on the SAVE button in the bottom part of the navigational toolbox. The Date and Time field in the upper left corner of Event Detail will be updated for record tracking purposes.

## 7.12 Attaching and sending Files

### Attaching and sending files

FASTbook's attachment function will allow you to attach any file to the event or email any of

the templates that you created in your word processor. Click on the Attachments tab located at the bottom part of the Event Detail screen right next to the Presenter tab.



- Click on the attach file button to pop-up a menu. You are given three choices, the first allows you to attach any file to the event. The second choice is to attach a merged word template to the document, make changes, save it and then right mouse click on it to email it to a client. The third choice is to email a merged word template to the client and attach a copy of it to the event.

## 7.13 Entering Tickets Information

### Entering Tickets Information for an Event

- Click on the Tickets tab located on the bottom part of the Event Detail screen right next to the Attachments tab.

The tickets information page opens.

Type	Date	Qty Available	Price	Qty Sold
Pioneer Pass	07/22/2005	50	\$17.50	30

- From the drop down list select a previously setup ticket type. Press <TAB>.
- Click the Date drop down list select correct date. Press <TAB>.
- Click on the Qty Available and enter available quantity of tickets. <TAB>.
- Click on the Price and enter price per ticket. <TAB>.
- Click on the Qty Sold and enter total number of tickets sold.

After **FASTbook** has placed a number into the quantity sold, use the <TAB> key to insert a new line in the table and you can add additional tickets.

## 7.14 Entering Additional Event Information

### Entering Additional Event Information

- Click on the Event Info located on the top part of Event Detail screen next to General.

General	Event Info	Ticket Totals	Web	Additional Clients	Audits	<input type="checkbox"/> Ticklers	<input type="checkbox"/> Notes	<input type="checkbox"/> Labor
Insurance Carrier	<input type="text"/>	Created	<input type="text" value="03/31/2005"/>					
Insurance Coverage	<input type="text"/>	Updated	<input type="text" value="04/28/2005"/>					
Insurance Fee	<input type="text"/>	Sales Rep.	<input type="text"/>					
Net Sqft.	<input type="text"/>	Booked By	<input type="text" value="KGE"/>					
Gross Sqft.	<input type="text"/>	Updated By	<input type="text" value="SUP"/>					

The top left part is the record tracking section. The date when the event was first created and the date and time the event was last updated are captured here.



- Enter the Name of the Insurance Carrier. (Optional). Press <TAB>.
- Enter the Insurance Coverage Amount. (Optional). Press <TAB>.
- Enter the Insurance Fee. (Optional). Press <TAB>.
- Enter the Net Square Feet of the room needed. Press <TAB>.
- Enter the Gross Square Feet of the room. Press <TAB>.

**FASTbook** will now calculate the Total Square Feet rate.

The Created date is the date the Event was created, the Updated date is the last date that the event changed. The Booked By is the person who booked the event and the Updated By is the last person to make a change to the event.

- Use the Sales Rep drop down box to select a Sales Rep for the event (Optional). Press the "Save" or Post edit button to save changes.

### 7.15 Printing Event Information



After Scheduling an event you can print an Event Information report that gives you all of the information that you need for the event.

- Click on the printer icon in the Navigational bar, or if you open up Reports you will also find the same report under the heading "Management". This will open the Information Report setup screen.

**Event Information**

Selection Options Field Choices

Only for the following event  
Event Number: 68 Event Name: T & B Medical News

For the following date range  
Start Date: 07/20/2005 End Date: 08/31/2005

Include Statuses **Select All Statuses** Include Event Types **Select All Event Types**


<input checked="" type="checkbox"/> Firm	<input checked="" type="checkbox"/> Ballet	<input checked="" type="checkbox"/> Football Arena
<input checked="" type="checkbox"/> Tentative 1	<input checked="" type="checkbox"/> Banquet	<input checked="" type="checkbox"/> Hockey
<input checked="" type="checkbox"/> Tentative 2	<input checked="" type="checkbox"/> Basketball	<input checked="" type="checkbox"/> Ice Show
<input checked="" type="checkbox"/> Hold 1	<input checked="" type="checkbox"/> Broadway	<input checked="" type="checkbox"/> Meeting
<input checked="" type="checkbox"/> Hold 2	<input checked="" type="checkbox"/> Class	<input checked="" type="checkbox"/> Move-in
<input checked="" type="checkbox"/> Hold 3	<input checked="" type="checkbox"/> Concert	<input checked="" type="checkbox"/> Move-out
<input checked="" type="checkbox"/> Deleted	<input checked="" type="checkbox"/> Concert Country	<input checked="" type="checkbox"/> Rehearsal
<input checked="" type="checkbox"/> Request	<input checked="" type="checkbox"/> Concert Rap	
<input checked="" type="checkbox"/> Estimate	<input checked="" type="checkbox"/> Conference	
<input checked="" type="checkbox"/> Cancel	<input checked="" type="checkbox"/> Exhibits	
	<input checked="" type="checkbox"/> Family Show	

Run Report Close

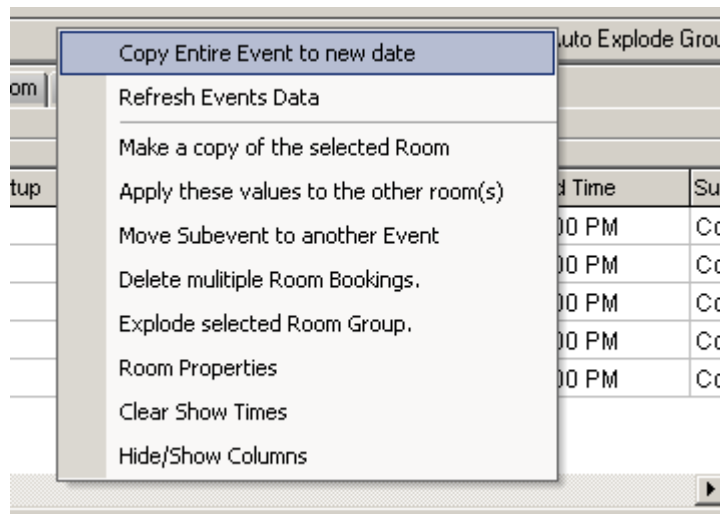
- Select or deselect the items that you want to include in your Event Information report. You can also change the name of the report by highlighting the current name and then typing the new name or you can select one from the drop down list.
- Click on Run Report at the bottom of the setup screen. You have a choice of printing or e-mailing the report.

## 7.16 Copy Entire Event to new date

### Using the Copy Entire Event to new date function

 FASTbook's copy event function will copy a complete event, room, equipment, meal, and labor information to a new event record.

- Choose the event you wish to copy.
- Click with the right mouse button anywhere to pop up a menu.
- Select the choice 'Copy Entire Event to new date'.




The copy event screen will pop up.

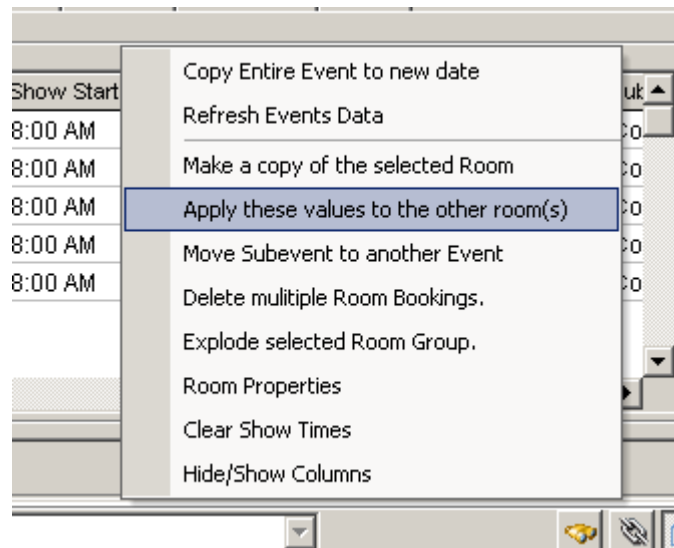
The top half of the copy event screen is the information you want to copy and the bottom half is the new event information that you are copying to.

- Enter a new event name if it is different than the old one. Type in the new start date and start time, <TAB> to status and select the status you want.
- If you have resources assigned to the event that need to be copied, click on the appropriate check box(es).
- Click on the OK button after you reviewed the information you have entered and **FASTbook** will copy the information from the old event to the new event and assign it a new event number. The system will notify you of any room or equipment conflicts during the copy process.

## 7.17 Apply these values to the other room(s)

 **FASTbook's** copy Sub Event edit function will allow you to copy room, equipment, meal, and labor information to other selected rooms of the same event.

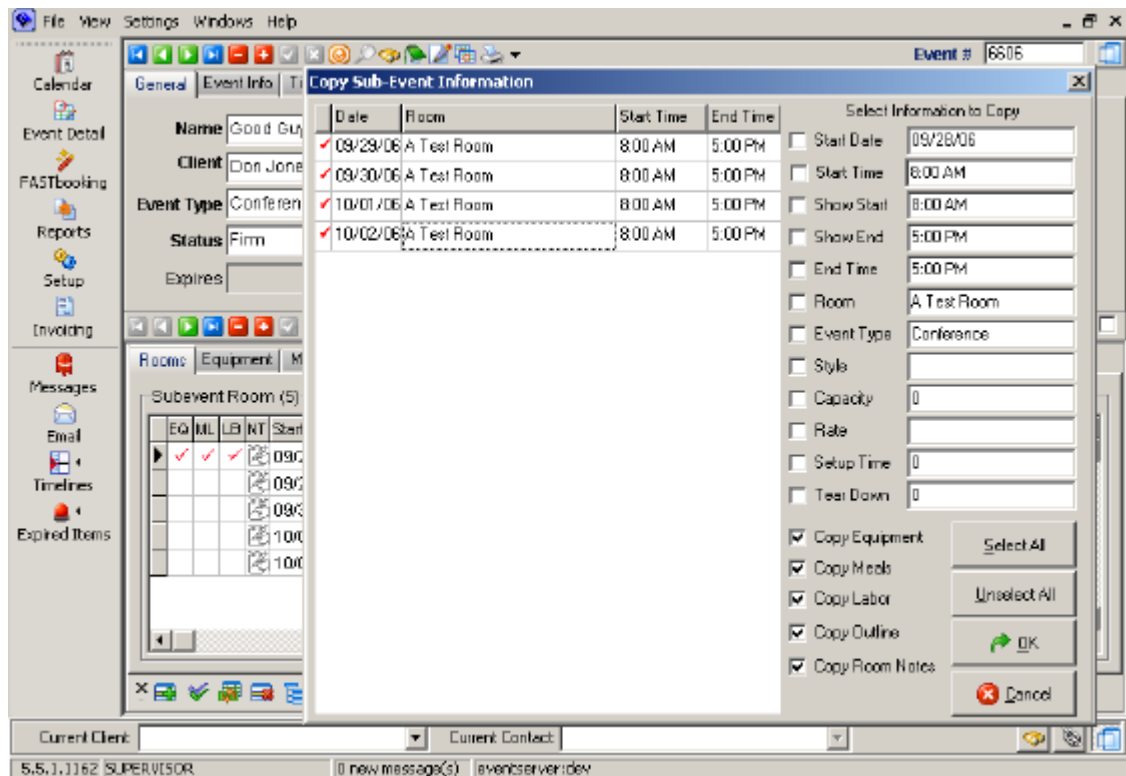
- Choose the Sub Event you wish to copy from by clicking on it. The cursor will move to the selected row.
- Click with the right mouse button anywhere in that row to pop up a menu.



- Select the Forth choice 'Apply these values to other room(s)'.

A screen will pop up.

If your cursor was in the Start Date field when you made the right mouse click, the Check box for the Start Date will have an 'x' in it already. If you do not wish to copy the Start Date of the Sub Event, click on the check box to take the 'x' off.



All rooms used for the event (except the currently selected one) are listed in the table on the left side.

The pertinent Event and Sub Event Information is displayed in the fields on the left side.

- Select all the information you want to copy by clicking on the appropriate check boxes.
- Double click on the rooms where you want the selected information to go to.

**FASTbook** will put a red check mark in front of every selected room.

**Example:** You have changed the End Time and the Rate for the first Room in the Sub Event tab and you have assigned Equipment, Meals, and Labor to it.

Once you have opened the Copy screen, click on the check boxes for End Time, Rate, Copy Equipment, Copy Meals, and Copy Labor. Then double click on the Rooms you want to copy the new information to. The rooms are listed in the table on the left side. Check the choices you have made carefully before you press the OK button.

Click on the OK button after you reviewed the information you have entered and **FASTbook** will copy all selected information to the appropriate rooms.



**NOTE:** If you checked one or more of the first four check boxes (Start Date, Start Time, End Time, Room, etc.), **FASTbook** will check for conflicts and the room.

To quickly select several rooms without double clicking the mouse on each room, use the SELECT ALL button. A red check mark will be placed in front of each room name in the list.

Use the UNSELECT ALL button to take the red check mark off all selected rooms.

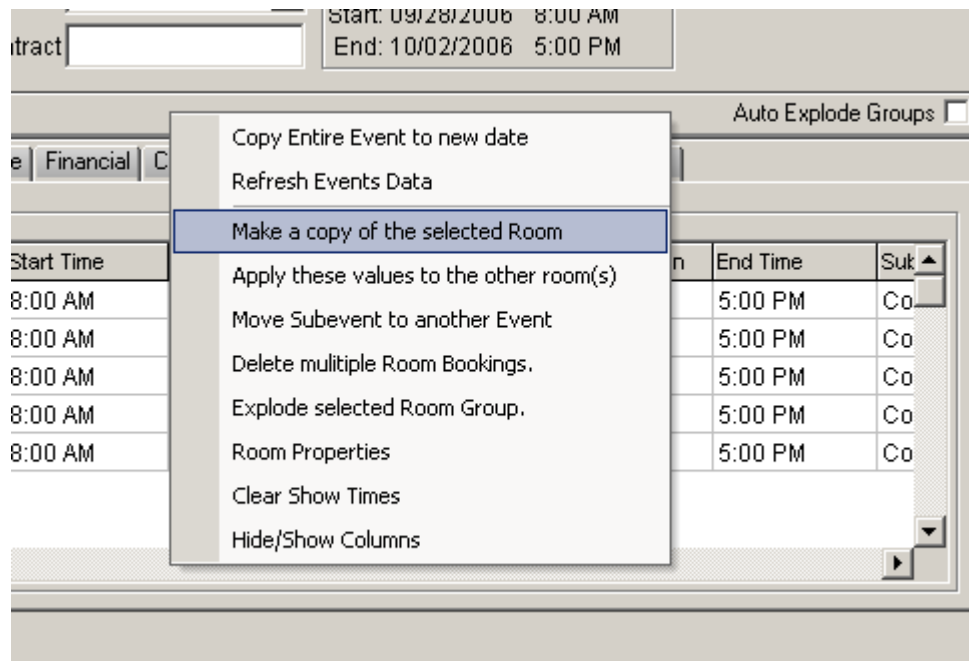
## 7.18 Make a Copy of Selected Room



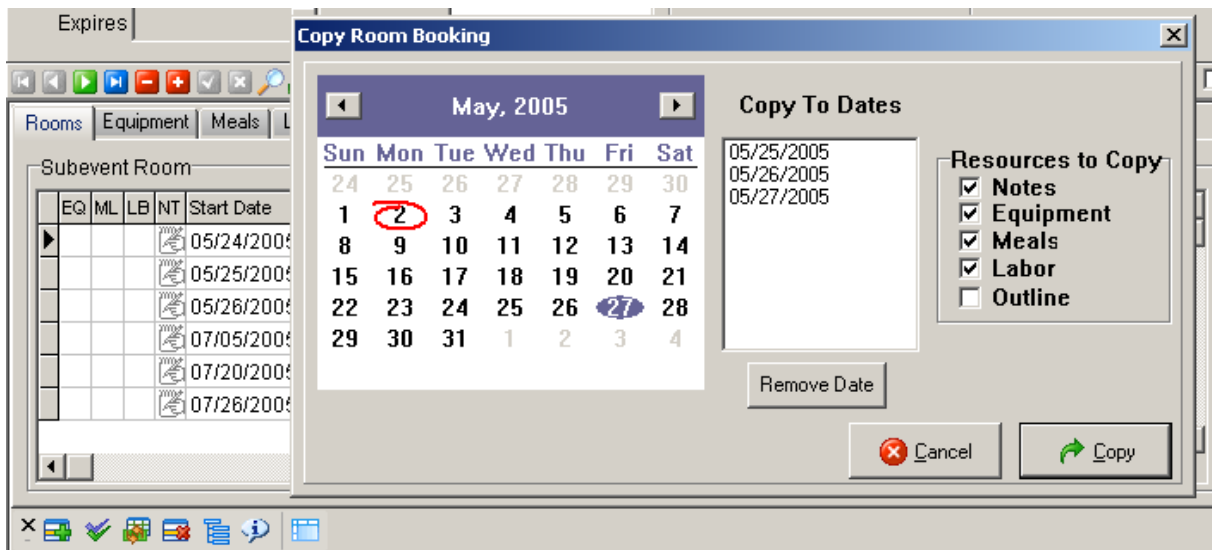
### Using the Copy Selected Room function

**FASTbook's** duplicate Selected Room Record will allow you to reproduce room, equipment, meal and labor information to other Sub Events of the same event.

- Remain with the cursor in the Sub Event you wish to duplicate to other Sub Events.
- Click with the right mouse button anywhere in that row to pop up a menu.



- Select 'Make Copy of Selected Room'.
- A screen will pop up.
- The date of the selected Sub Event is highlighted on the calendar.



- If you want to duplicate a Sub Event for several days, simply point and click on the days you want to book. If you make a mistake, highlight the wrong date and select 'Remove Date'.
- If you have resources assigned to the Subevent that need to be duplicated, click on the appropriate check box(es) in the resource section.

- Click on the OK button after you have reviewed the information you have entered and **FASTbook** will duplicate the information for the appropriate rooms for the indicated number of days and attach the resources you have checked.

If you wanted the Sub Event notes to be copied, mark the appropriate check box; there will be notes for every resource after **FASTbook** has processed the booking.



**NOTE:** If there are any conflicts, like a room is already booked for another event, **FASTbook** will let you know by popping up a message. If a message was sent by **FASTbook**, you will have to check the Sub Events, because some rooms might not have been booked since they were already in use for other events.

**Example:** You have entered all required information for a Sub Event in the Rooms tab and you have assigned Equipment, Meals, and Labor. There are also notes for several resources. Since the event is taking place for five days in the same room with the same equipment and meals, **FASTbook's** duplicate function allows you to duplicate the already entered information for four more days without entering the Sub Events line by line.

Once you open the Duplicating screen, click on the check boxes for Notes, Rooms, Equipment, and Meals. Select the dates desired for the remaining four days. Check the choices you have made carefully before you press the OK button.

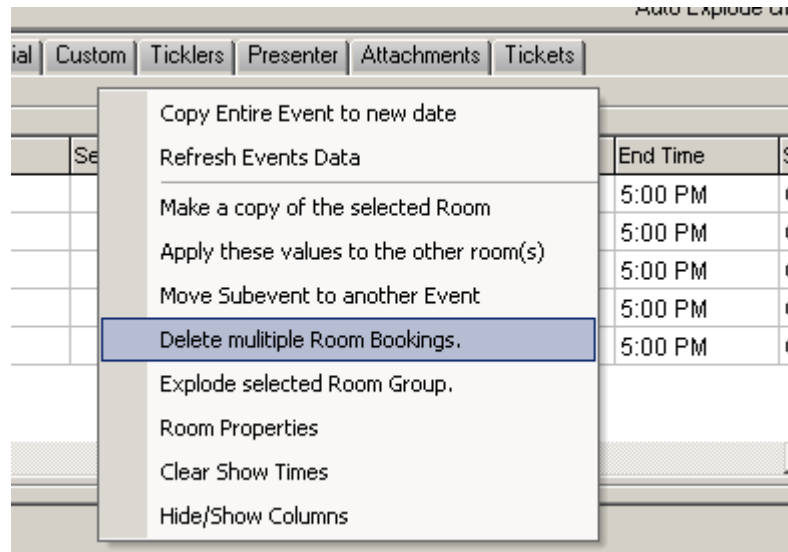
## 7.19 Delete multiple Room Bookings



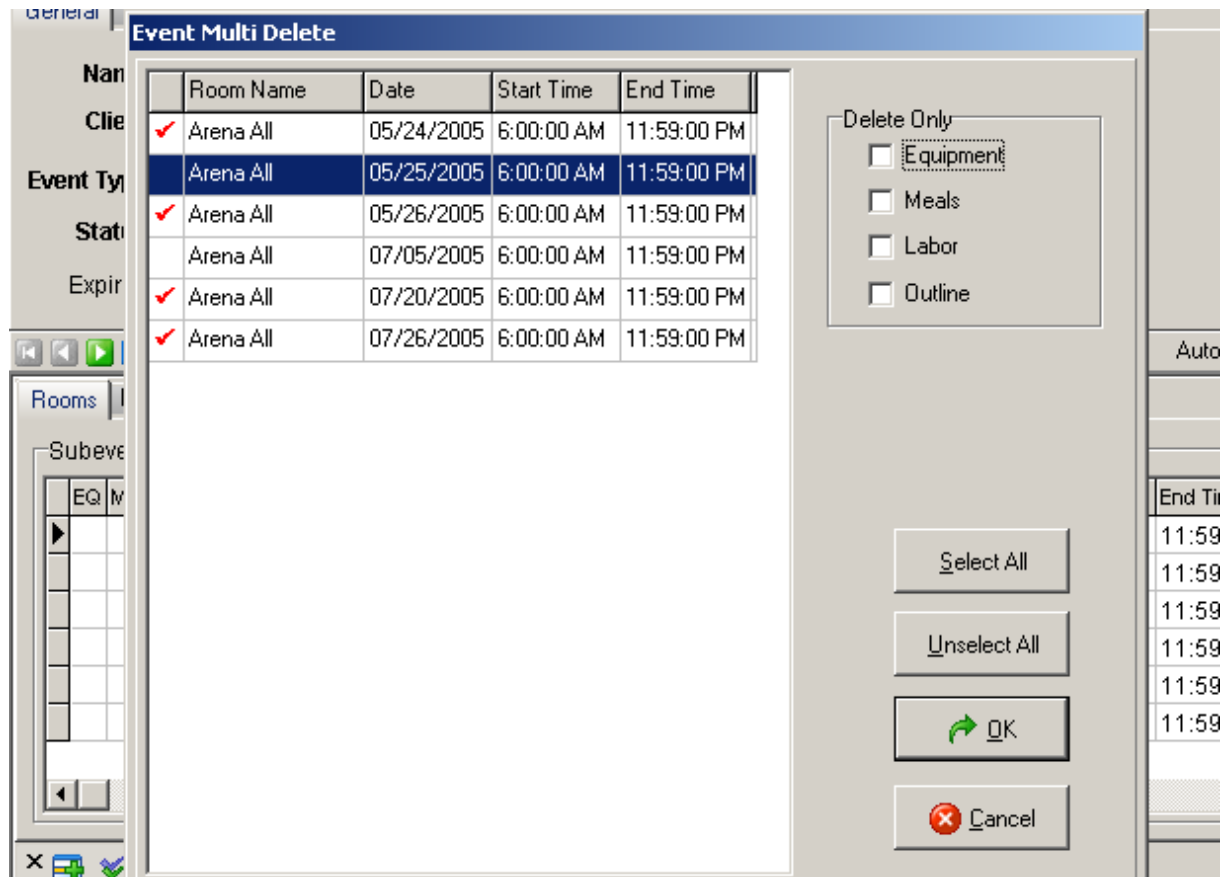
### Using Delete multiple Room Bookings function

**FASTbook's** multiple delete Sub Event will allow you to quickly remove room, equipment, meal, and labor information from an event.

- Move the cursor into the Sub Event rooms tab.
- Click with the right mouse button anywhere in that row to pop up a menu.
- Select 'Multi Sub Event Delete'.



A screen will pop up. All the Sub Event rooms are listed in the table on the left side of the screen. On the right side you will see check boxes for the other resources.





- If you want to delete Sub Events with all attached resources, do not click on any of the check boxes. Double click on the room(s) you want to delete to select it (them).
- Once the red check mark is placed in front of the room name, click the OK button.

The room is now being deleted, including the resources that were attached.

- If you want to remove equipment, meals, or labor from Sub Events, click on the appropriate check box(es). Double click on the room(s) you want to remove the resources from.
- Once the red check mark(s) is (are) placed in front of the room name(s), click the OK button.

The appropriate resource is now being deleted from the room(s) you had selected.

To quickly select several rooms without double clicking the mouse on each room, use the SELECT ALL button. A red check mark will be placed in front of each room name in the list.

Use the UNSELECT ALL button to take the red check mark off all selected rooms.

**Example:** You have booked a room for one week. All Equipment is already attached when the client decides to rent the equipment from another company.

Instead of highlighting each room separately to then delete each individual piece of equipment, you can just open the multiple delete screen, select the room for each day (SELECT ALL button), and then click on the equipment check box.

Press on the OK button to delete all equipment from all rooms booked.

## 7.20 Event Outline

### Event Outline

The Event Outline can be accessed from Event Detail. This module is used to create a detailed outline of everything that is to take place for an event. The Event Outline can be printed out by itself or may be attached to the Event Information printout.

Description	Date	Start Time	End Time	Notes
Check HVAC controls	05/24/2005	6:00 AM	11:59 PM	
Parking lot opens	05/24/2005	3:30 PM	11:59 PM	
Open box office	05/24/2005	4:00 PM	11:59 PM	
Lobby opens	05/24/2005	5:00 PM	11:59 PM	
Ushers in place	05/24/2005	5:20 PM	11:59 PM	
House opens	05/24/2005	5:30 PM	11:59 PM	

- Press the Event Outline button in Event Detail. The button is located on the left side of the screen.
- The Event Outline Module opens showing all of the Sub Events for the event that you are working on.
- Click on the first Sub Event you want to outline.
- Click in the description area and pick a predefined outline description from the drop down list. Press <TAB>.
- Enter the start time. (Optional). Press <TAB>.
- Enter the end time. (Optional). Press <TAB>.
- Type in any comments you have in the notes area. Press <TAB>.

Continue the above process until the outline is complete. The system will sort by start time, then end time, for a given Sub Event. This allows inclusion of additional items.

- Click on Print. **FASTbook** then gives you the choice of previewing or printing your Event Outline.
- Click on close to return to Event Detail.

## 7.21 Word Processor



The Word Processor can be accessed from the Event Detail tab in the Main Toolbar on the left side of **FASTbook**. This module uses the functionality of Mail Merge and MS query word processor, and can be used to type up a simple letter or can be utilized to set up all the documents that will be needed for the various events. A key feature of **FASTbook's** Word Processor is that you can setup Templates with form fields and then merge the information from the Event to the template and print it or E-Mail it in seconds. If you have currently utilized documents saved in your word processor, you can open them into **FASTbook's** word processor, add the fields you require, and then save them as templates.

- Press the Word Processor button in Event Detail.

The Word Processor Module opens with the Word Processor screen active. You can begin typing just as you would in any other word processor.

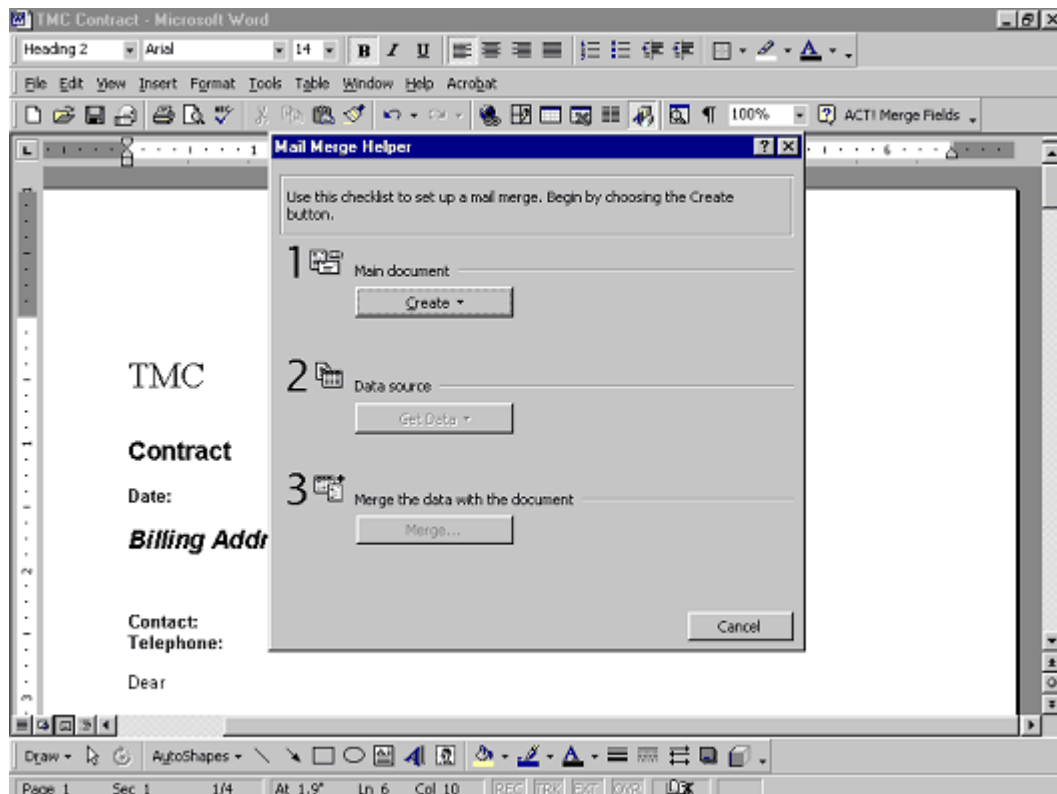
- To add Form fields to your document follow the directions below.

### Creating a Main Document for a Form Letter

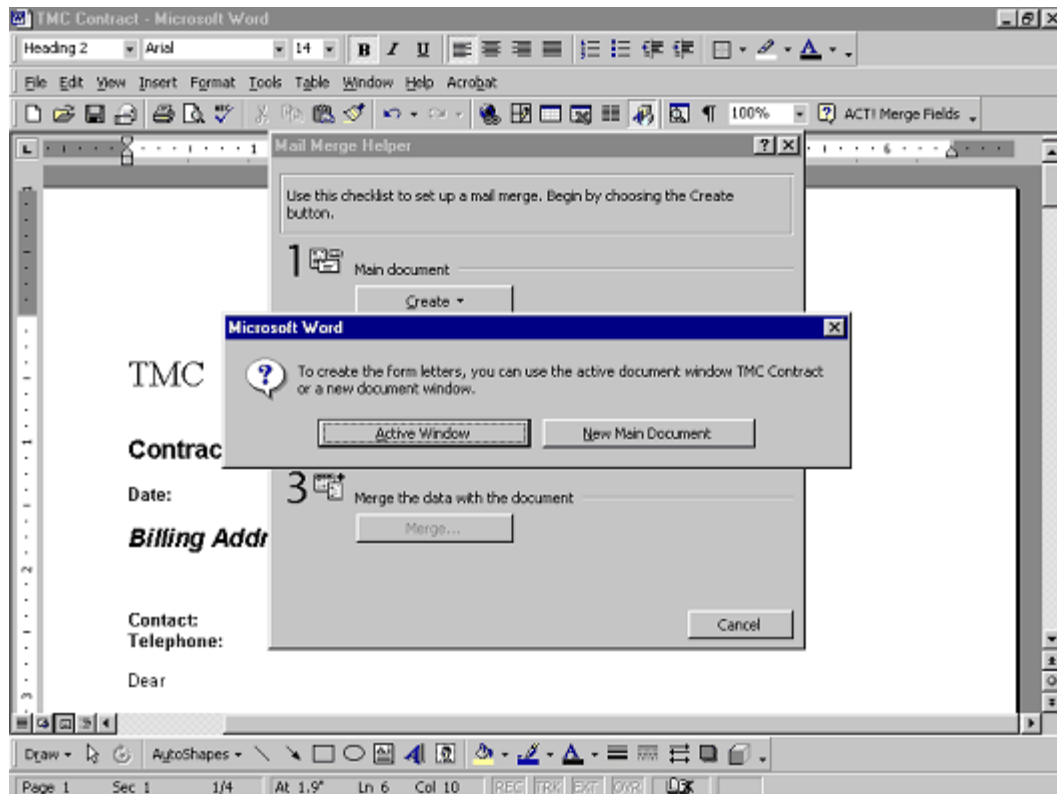
The first step in creating a form letter in FASTbook's word processor is to open the document you will use as the *main document*. The main document contains the text, punctuation, spaces, graphics, and other information you want to be the same in each form letter.

#### To set up a form letter main document

- Open the document you want to use as the main document.
- You can open an existing letter, or you can begin a new letter based on a template you select.
- From the Tools menu, choose Mail Merge.
- Under Main Document, choose the Create button, and then choose Form Letters.



- Choose the Active Window Button.



- Under the Create button, Word displays the type of merge it will perform and the name of the main document.

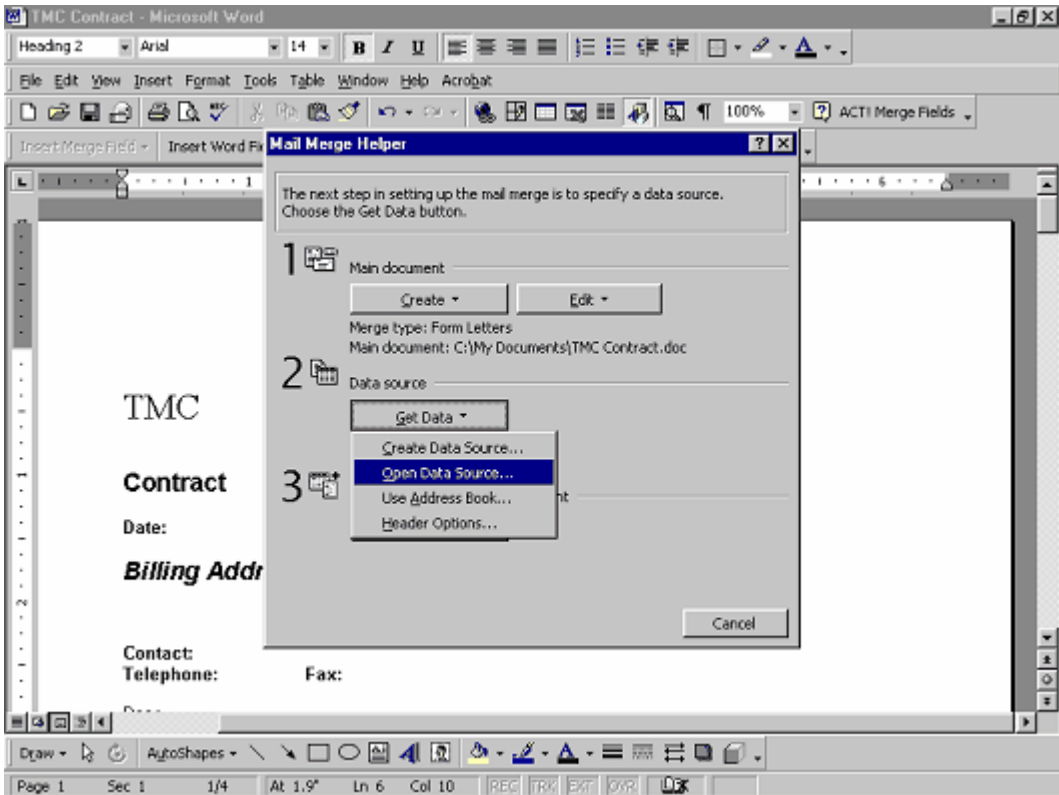
### Specifying the Data Source

To indicate which information you want to merge with the main document for the form letter, you must specify the *data source*. The data source contains the information that can vary in each version of a form letter, such as names and addresses. You can open an existing data source created in Word, or you can create a new data source and fill in the addressee information.

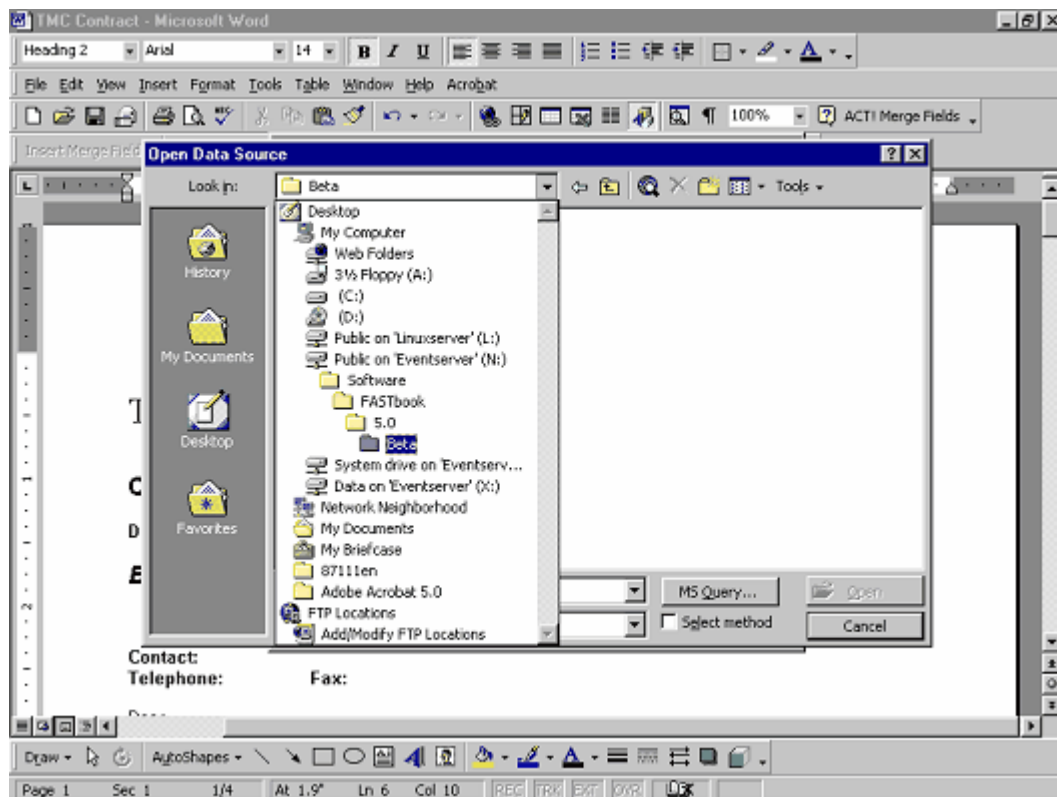
- Opening an Existing Data Source

If addressee information has already been set up in a Word document, you can open that document and use it as your data source. If the data records are not set up in a Word table, they must be organized in separate paragraphs with tab characters or commas separating the data fields.

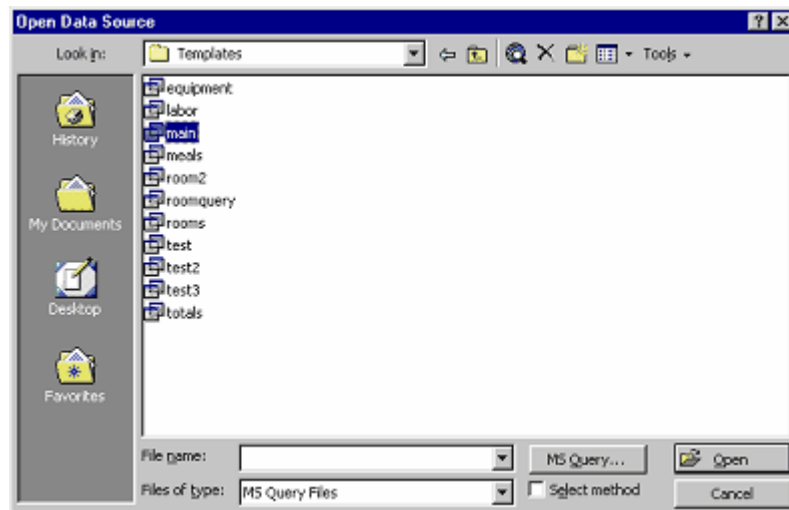
- To open an existing data source
- In the Mail Merge Helper dialog box, choose the Get Data button under Data Source
- Choose Open Data Source.



- From the list of files in the dialog box, select the data source you want to use, and then choose the open button. For example: F:\FBWin50\programs\templates



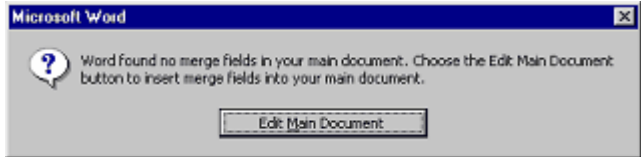
- If the data source is not listed, select the appropriate drive and directory or volume and folder. Then select the appropriate option in the List Files of Type box (MS Query Files).
- In your Open Data Source, Look In: should say Templates and your Files of type box should have (MS Query Files)
- Select the "Main" Document folder and choose the open button.



- Select the "Yes" button to connect your template to your FASTbook data each time it opens.



- Next Select Edit Main Document



- Click on the pull down menu under Insert Merge Field. Select the fields you need for your document by clicking on them to place them in your document.

**NOTE:** Be sure to save your document as a template before merging it with an Event. After saving, you can select the Merge button to complete the template.

## 7.22 Entering Ticket Totals Information

### Entering Ticket Totals

- Click on the Ticket Totals located on the top part of the Event Detail screen next to Event Info.
- Enter the Announce Date. Press <TAB>.

General	Event Info	<b>Ticket Totals</b>	Web	Additional Clients	Audits	<input type="checkbox"/> Ticklers	<input type="checkbox"/> Notes	<input type="checkbox"/> Labor
Announce Date	<input type="text"/>	Proj. Attendance	<input type="text"/>					
Ticket Sale Date	<input type="text"/>	Current Attendance	<input type="text"/>					
Ticket Sale Time	<input type="text"/>	Total Attendance	<input type="text"/>					
		Ticket Totals	<input type="text"/>					

- Enter the date the Tickets go on Sale (Optional). Press <TAB>.
- Enter the Projected Attendance. Press <TAB>.

- Enter the Current Attendance. Press <TAB>.
- Enter the Total Attendance. Press <TAB>.
- Enter the Total from the Ticket sales. Press <TAB>.

## 7.23 Closing Event Detail

### Closing Event Detail

- Click on the Calendar icon on the tool bar to return to the Calendar; it is not necessary to close Event Detail when returning to Calendar.

If you forgot to save any of your entries in one or more of the 10 tabs, **FASTbook** will inform you of any unsaved changes before closing.

- Click on File on the menu bar located above the toolbar, then select Exit to exit **FASTbook**.
- Choose Minimize from the title bar to minimize **FASTbook** for later use. Selecting Minimize will display two icons at the bottom of the screen: **FASTbook** and Event Detail.



**FASTbook 5.5**

# **Chapter**



**8**

Invoicing

## 8 Invoicing

### 8.1 Overview

#### FASTbook 5.5 Invoice

The FASTbook Invoice allows you to easily control the many aspects of client billing. You are able to set up [payment terms](#), [design custom line items](#), track payments made, and adjust the final total. FASTbook Invoicing also delivers the ability to produce one or more invoices per event with financial accounting controls. These controls include Draft, Final and Void status, [adding and manipulating additional charges](#), and accounts receivable transactions.

FASTbook also allows you to not only [print your invoices](#), but [email](#) them or [save them to a file](#) in formats such as PDF, HTML, and others. Several invoice features are also available in the [financial tab of Event Detail](#) for easier and faster access.

You can access the invoice module from the main button bar by clicking on the button labeled Invoicing



or by double clicking on an invoice in the [Invoice Grid](#) in the Event Detail financial tab's Invoices tab. You can access the Invoices tab on the right side of the Financial tab as seen below.

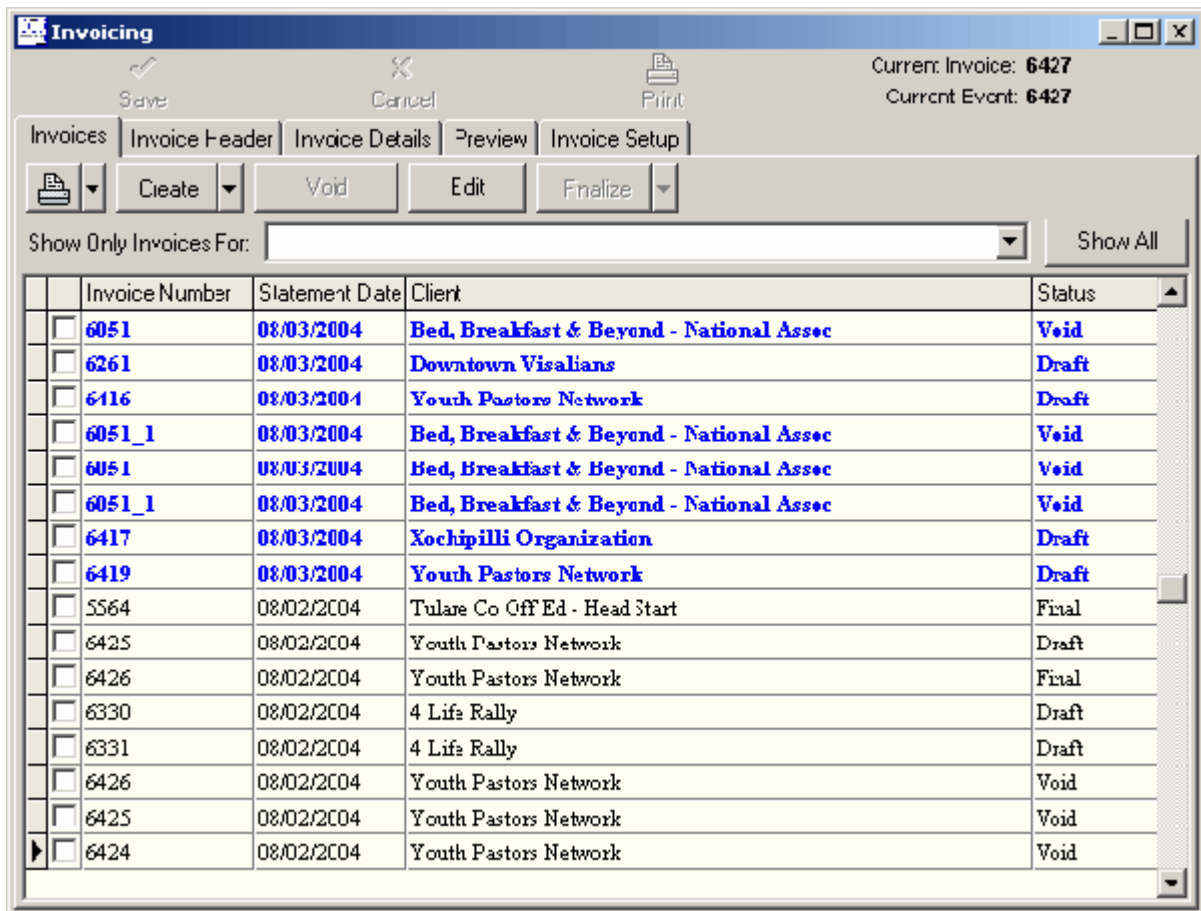
The screenshot shows the "Financial" tab selected in the top navigation bar. The "Invoices" sub-tab is active on the left sidebar. The main content area displays "Event Financial Information / Charges" with a dropdown menu set to "Promoter" and a "PO Number" field. Below this is a table of charges:

Room Charge	Equipment	Labor	Meal	Resource Total
\$370.00	\$150.00	\$0.00	\$0.00	\$520.00
Other Costs				\$0.00
<b>Event Total</b>				\$520.00
Total Received				\$0.00
Remaining				\$520.00

A blue speech bubble callout points to the "Invoices Tab" label on the left sidebar.

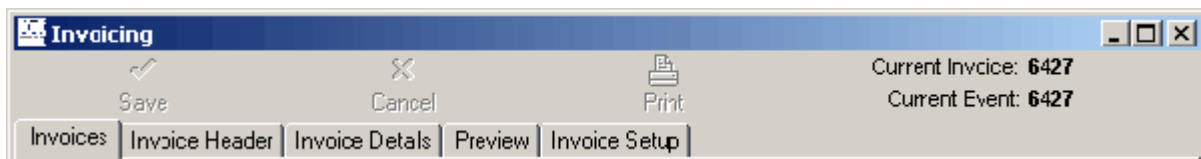
### 8.2 Invoicing Form

The main Invoice Form allows you to get to the different areas of an invoice as well as the [Invoice setup](#).



Across the top are buttons to save, cancel or [print the invoice](#) you are currently working on. There are also two labels. Current Invoice and Current Event. These tell you what invoice is currently active and what event is associated with that invoice.

When the Save button is enabled, you can save any changes you have made, thus making them permanent. Similarly, when the Cancel button is enabled, you may cancel any changes you have made since the last save. The Print button will [print the invoice](#) you are currently working on.



Below the buttons are five tabs that will take you to different areas of the invoice. Not all tabs are always available as some require you to have a current invoice to work with. When no invoices have been created, no invoice has been selected, or you are working with multiple invoices (for instance to print), you will not be permitted to enter the middle three tabs. These tabs are only used to [edit or view a single invoice](#).

The [Invoices](#) tab is a general overview of the invoices you have in the system.

The [Invoice Header](#) tab is the main header information for a single invoice, such as who the client is, when its due, etc.

The [Invoice Details](#) tab is a list of charges that will be applied to that invoice.

The [Preview](#) tab is an on-screen printout of what your invoice will look like when it is printed (or emailed or saved to file.)


The [Invoice Setup](#) tab allows you to view and change your FASTbook Invoicing setup.


The Invoice Form is a child form of the main FASTbook window. This means that once in the Invoice Form you can press CTRL-TAB to switch between other child forms, meaning the Event Detail form and the Calendar Form. This may expedite switching from the Invoice Tab to Event Detail / Calendar when information is sought.

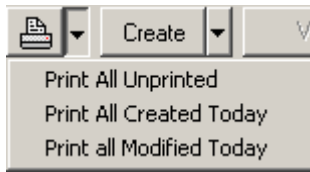
## 8.2.1 Invoices Tab

The Invoices tab allows you to do general tasks with invoicing or work with multiple invoices at one time.

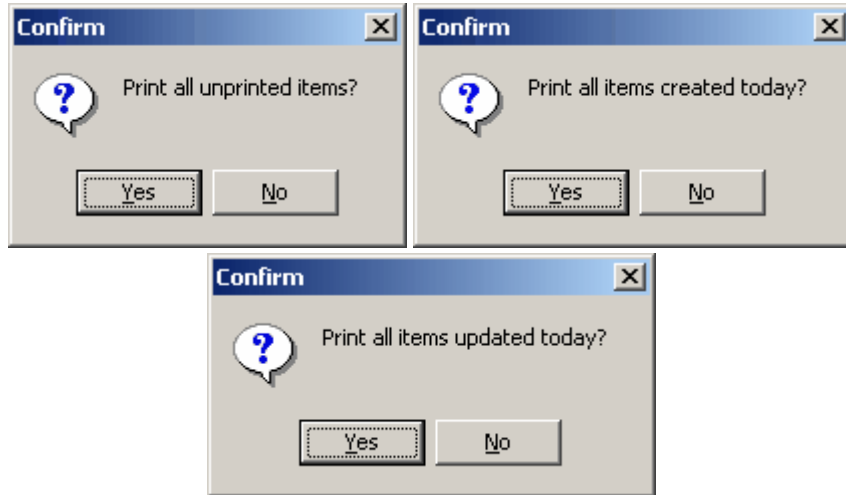
From this tab you can print multiple invoices, void or finalize multiple invoices, create invoices by batch, or work with a single invoice.

Invoices   Invoice Header   Invoice Details   Preview   Invoice Setup				
 <input type="button" value="Create"/> <input type="button" value="Void"/> <input type="button" value="Edit"/> <input type="button" value="Finalize"/>				
Show Only Invoices For:				<input type="button" value="Show All"/>
	Invoice Number	Statement Date	Client	Status
<input type="checkbox"/>	6051	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6261	08/03/2004	Downtown Visalians	Draft
<input type="checkbox"/>	6416	08/03/2004	Youth Pastors Network	Draft
<input type="checkbox"/>	6051_1	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6051	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6051_1	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6417	08/03/2004	Xochipilli Organization	Draft
<input type="checkbox"/>	6419	08/03/2004	Youth Pastors Network	Draft
<input type="checkbox"/>	5564	08/02/2004	Tulare Co Off Ed - Head Start	Final
<input type="checkbox"/>	6425	08/02/2004	Youth Pastors Network	Draft
<input type="checkbox"/>	6426	08/02/2004	Youth Pastors Network	Final
<input type="checkbox"/>	6330	08/02/2004	4 Life Rally	Draft
<input type="checkbox"/>	6331	08/02/2004	4 Life Rally	Draft
<input type="checkbox"/>	6426	08/02/2004	Youth Pastors Network	Void
<input type="checkbox"/>	6425	08/02/2004	Youth Pastors Network	Void
<input checked="" type="checkbox"/>	6424	08/02/2004	Youth Pastors Network	Void


The top left button with the print icon  can be used to either print the current invoice in the grid (designated by the black arrow pointing at the row) or all invoices that are checked in the grid. By pressing the drop down portion of the button you can print multiple invoices at once. The following menu will appear.

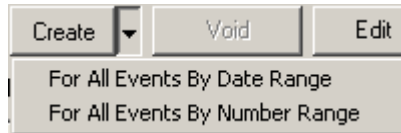


With this menu you can print all the invoices that have yet to be printed, all the invoices that were created today, or all the invoices that have been modified today. Use this with care as the system will indeed print all invoices that fall into its category. As a precaution, you will be prompted as to whether or not you really want to do this.




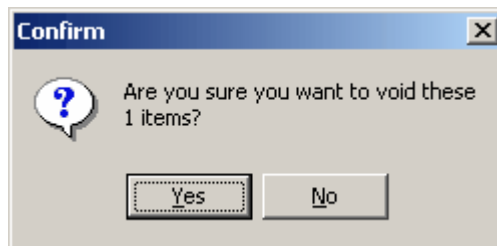
Answering "No" to any of the confirmations will cancel printing.

The next button, Create , will take you into the Invoice Header tab to begin the creation of a new invoice. You can alternatively use the drop down on the Create button to get the following menu.



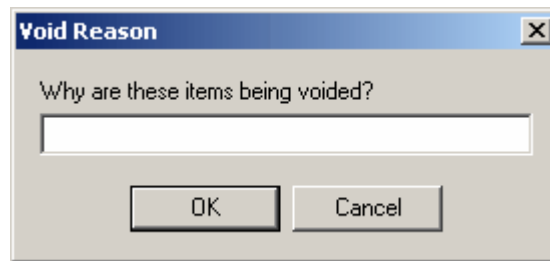
With this menu you can create multiple invoices at the same time based on criteria you select. You can do this based on an event number range or a date range. After you select one of these options you will be taken to the Batch Invoice Form.

The Void button  will allow you to void all invoices that are checked. You will be prompted as to whether or not you really want to void the invoices and the number of items you have selected.

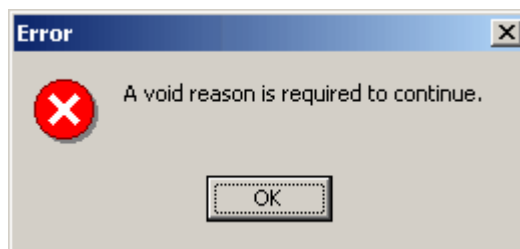


Choosing "Yes" will proceed with the void. Choosing "No" returns you to the Invoices Tab. When

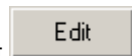
voiding, you are always prompted for a reason why. This is saved in the invoice and can be reported on at a later time. The input screen looks like this.

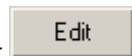


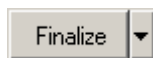
If you decide to cancel the void reason, your void is also canceled and you are presented with the following message.

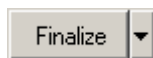


Upon successfully entering in a void reason, your invoice will be voided. All payments that were assigned to that invoice item will be set as unassigned (meaning not assigned to any invoice) and all items that were on that invoice will be available for any new invoices created for the event. Void invoices will have a watermark that reads "Voided Invoice Do Not Pay" unless this feature has been disabled in [Invoice Setup](#).



The next button, Edit , will take you to the Invoice Header tab and allow you to start editing the currently selected invoice. Clicking this will mark the invoice you have selected as the current working invoice and take you to the Invoice Header tab.

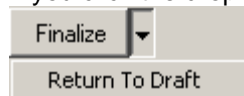


The next is Finalize . This button will Finalize all checked invoices. You will be prompted as to whether or not you really want to finalize the invoices and the number of items you have selected.

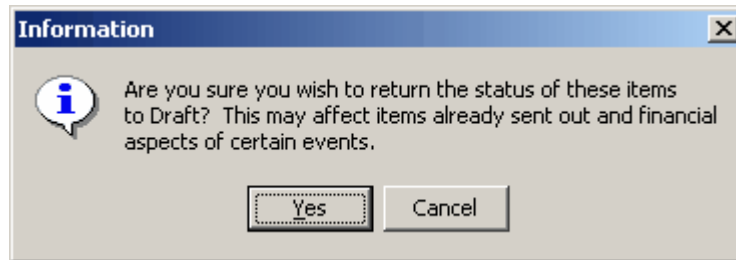
Choosing "Yes" will proceed with the finalizing; choosing "No" will return you to the Invoices Tab.

Once an invoice is finalized it enters a read-only state and charges may not be added, changed or removed from the invoice. Final invoices have no watermark on their printouts.

If you click the drop down on the Finalize button, you will see the Return to Draft option.



This lets you return an invoice to its Draft state to allow editing again.



Choosing "Yes" will proceed with the action. Choosing "No" will return you to the Invoices Tab.

Below the buttons is the client filter for the invoices grid. If you wish to only see the invoices that pertain to a certain client, you can select the client in the drop down list and the grid will refresh accordingly. To show all clients again simply click the Show All button or click in the client name box and delete the name.

Show Only Invoices For:  Show All

The bottom portion and the majority of the tab is the invoices grid. This grid allows you to select an active invoice by clicking on the row and pressing the Edit button or by double clicking the row you wish to work with. When multiple invoices are selected (checked), this features is disabled.

	Invoice Number	Statement Date	Client	Status
<input type="checkbox"/>	6365	08/03/2004	4 Life Rally	Draft
<input type="checkbox"/>	6427	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Final
<input type="checkbox"/>	6427	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6427	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6427	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6058	08/03/2004	H F S Food Safety Council	Draft
<input type="checkbox"/>	6057	08/03/2004	H F S Food Safety Council	Draft
<input type="checkbox"/>	6051	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Draft
<input type="checkbox"/>	6051	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	5950	08/03/2004	C A C P A Education Foundation	Draft
<input type="checkbox"/>	6066	08/03/2004	H F S Food Safety Council	Draft
<input checked="" type="checkbox"/>	6051	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6261	08/03/2004	Downtown Visalians	Draft
<input type="checkbox"/>	6416	08/03/2004	Youth Pastors Network	Draft
<input type="checkbox"/>	6051_1	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void
<input type="checkbox"/>	6051	08/03/2004	Bed, Breakfast & Beyond - National Assoc	Void

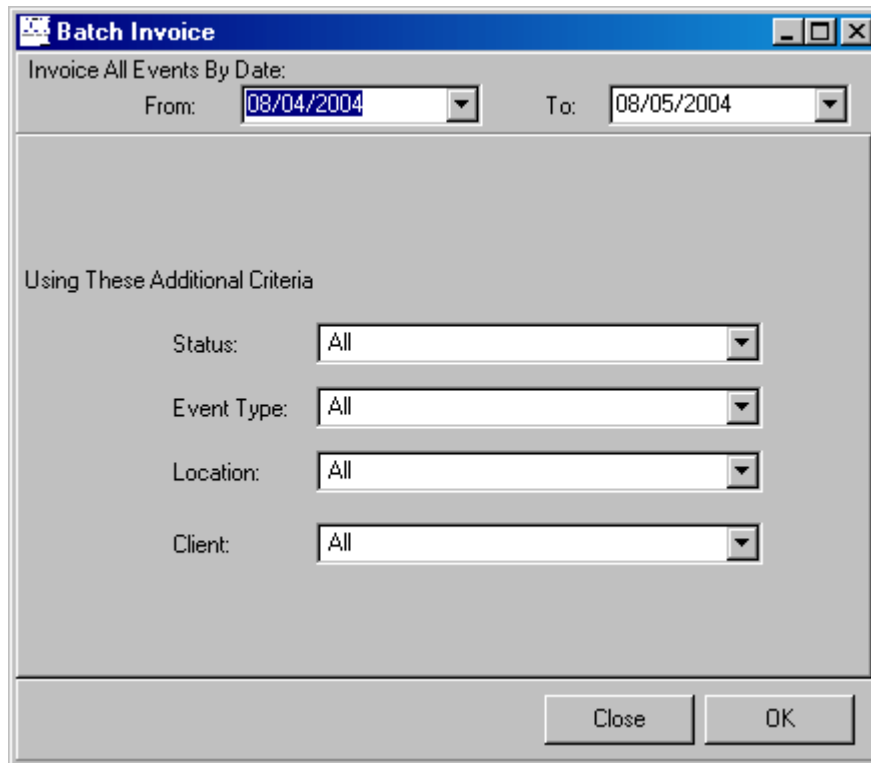
Invoices created today are blue bolded for easy visibility.

### 8.2.1.1 Batch Invoice by Date Range

Invoices can be generated in batches based on specified criteria. The Batch Invoice Form can be accessed by clicking either of the two menu items in the Create button's drop down list. To create invoices based on a date range, click the first item labeled "For All Events By Date Range"

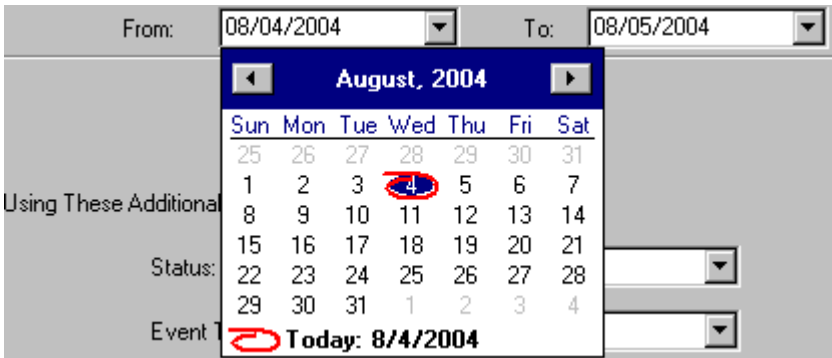


After clicking the menu item, you will be taken to the Batch Invoice Form for date range.

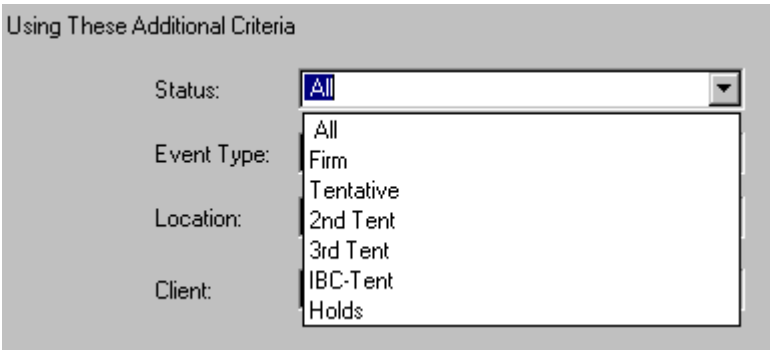
A screenshot of a 'Batch Invoice' window. The title bar reads 'Batch Invoice'. Below the title bar, it says 'Invoice All Events By Date:'. There are two date input fields: 'From:' with the value '08/04/2004' and 'To:' with the value '08/05/2004'. Below these is a section titled 'Using These Additional Criteria' with four dropdown menus: 'Status: All', 'Event Type: All', 'Location: All', and 'Client: All'. At the bottom right are 'Close' and 'OK' buttons.

The first two input boxes will ask for the date from which you want to start your search until the date you wish to end your search. The search will include both the From and To dates that were specified. For example if you searched from July 1st to July 15th, any events on the 1st and the 15th would be included as well. When entering in dates you can either type in the date you wish or select the drop down button which will present you with a date picking calendar.





You can also narrow your search by specifying any of the following criteria.



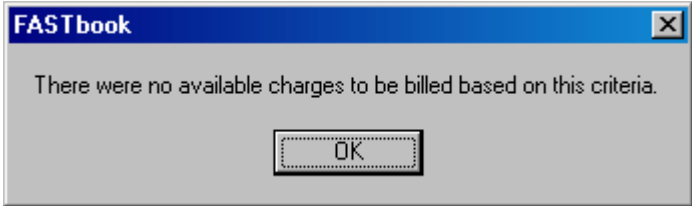
Once all your criteria has been entered you can press the OK button to start your batch invoice generation. If you decide to not create a batch at this time you can also click on the Close button.



After you have started the batch, an hourglass icon will appear while the information is processed. If items matching your criteria were found, invoices will be made for each of them. A dialog box will appear and inform you of how many items were created. Clicking OK on this will take you back to the Invoices Tab. Remember items created today are blue bolded to make them easier to find.



If nothing was available based on your criteria, the following screen will display.



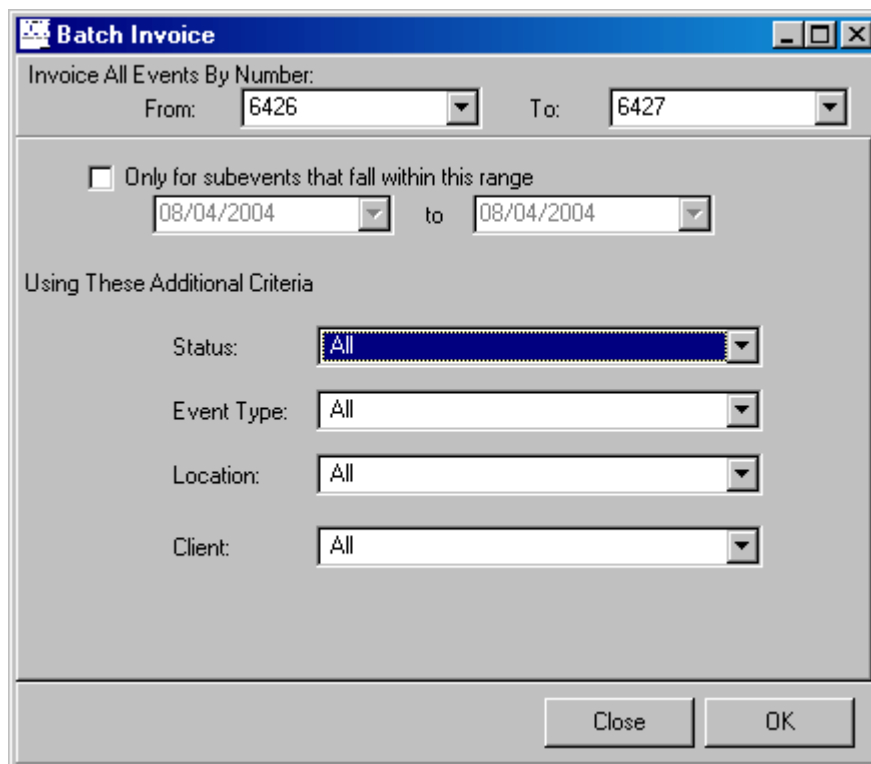
This means no invoices were created. You can try again if you would like by selecting different criteria and running a batch again.

### 8.2.1.2 Batch Invoice by Event Number Range

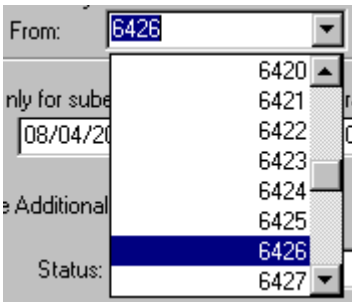
Invoices can be generated in batches based on specified criteria. The Batch Invoice Form can be accessed by clicking either of the two menu items in the Create button's drop down list. To create invoices based on an event number range, click the second item labeled "For All Events By Number Range"



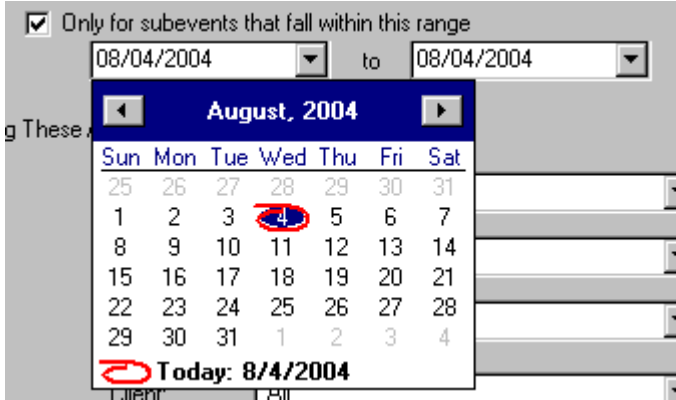
After clicking the menu item, you will be taken to the Batch Invoice Form for a number range.

A screenshot of a 'Batch Invoice' dialog box. The title bar reads 'Batch Invoice'. Below the title bar, it says 'Invoice All Events By Number:'. There are two input fields: 'From:' with the value '6426' and 'To:' with the value '6427'. Below these is a checkbox labeled 'Only for subevents that fall within this range' which is unchecked. Underneath the checkbox are two date input fields, both containing '08/04/2004', separated by the word 'to'. Below this section is the heading 'Using These Additional Criteria'. There are four dropdown menus: 'Status:' (set to 'All'), 'Event Type:' (set to 'All'), 'Location:' (set to 'All'), and 'Client:' (set to 'All'). At the bottom right of the dialog are 'Close' and 'OK' buttons.

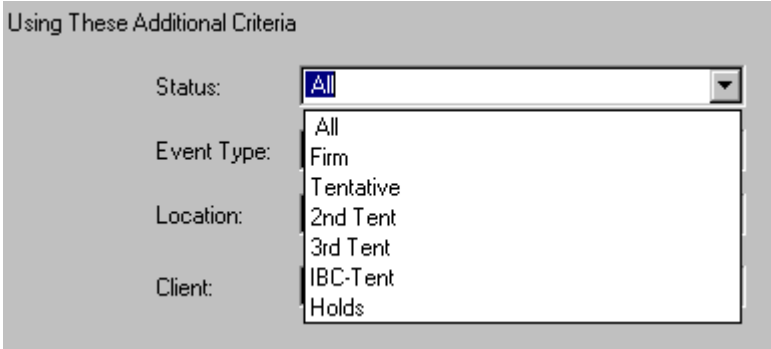
The first two input boxes will ask for the event number from which you want to start your search to the event number you wish to end your search. The search will include both the From and To event numbers that were specified. For example if you searched from event number 10 to event number 20, then events 10 and 20 will be included in your search. You can select the event numbers by using the drop down in the event number fields.



You can also choose to only search for subevents that start and end within a time range specified. So even though you want to make items for all events that fall into your event number range, you may only want to look for subevents that have a certain start date. To use this feature first click the check box labeled "Only for subevents that fall within this range," then select your date range using the input boxes. The search will include both dates that were specified. For example if you searched from July 1st to July 15th, any events that fall into your event number range and are on the 1st and the 15th would be included as well. When entering in dates you can either type in the date you wish or select the drop down button which will present you with a date picking calendar.



You can also narrow your search by specifying any of the following criteria.



Once all your criteria has been entered you can press the OK button to start your batch invoice generation. If you decide to not create a batch at this time, you can also click on the Close button.

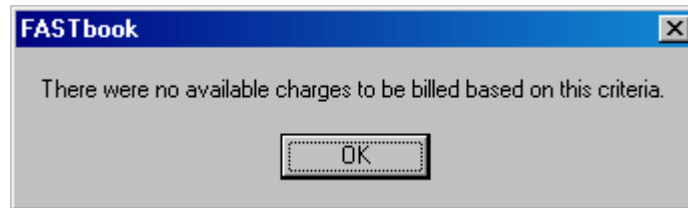


After you have started the batch an hourglass icon will appear while the information is processed. If

items matching your criteria were found, invoices will be made for each of them. A dialog box will appear and inform you of how many items were created. Clicking OK on this will take you back to the Invoices Tab. Remember items created today are blue bolded to make them easier to find.



If nothing was available based on your criteria, the following screen will display.



This means no invoices were created. You can try again if you would like by selecting different criteria and running a batch again.

### 8.2.2 Invoice Header Tab

The Invoice Header tab allows you to specify top-level information about the invoice. Here you will specify which event you are working with, which client, the start and end dates of the invoice, how you want the invoice to print, and other common values.

The screenshot shows the 'Invoice Header' tab of the software. At the top, there are tabs for 'Invoices', 'Invoice Header', 'Invoice Details', 'Preview', and 'Invoice Setup'. The main form contains the following fields and options:

- Client:** Don Jones (dropdown)
- Event Number:** 6606 (dropdown)
- Start:** 09/13/2005 (dropdown)
- End:** 09/13/2005 (dropdown)
- Title:** Invoice (dropdown)
- Invoice Number:** 6606 (text)
- Invoice Status:** Draft (dropdown)
- Remit To:** Event Software, Accounts Payable Dept., 540 W Iron Avenue, Suite 204, Dallas, TX 75210
- Bill To:** (empty dropdown)
- Notify:** (empty dropdown)
- Attn:** Elaine Martell (dropdown)
- Statement Date:** 09/13/2005 (dropdown)
- Payment Due Date:** 10/13/2005 (dropdown)
- Payment Terms:** 2% net (dropdown)
- Special Terms / Custom Invoice Note:** (empty text area)
- PO Number:** (empty text)
- Contract:** (empty text)
- Footer:** Don't forget to pay us promptly. (text)
- Print Options:**
  - Print Payment Information
  - Print Section Breakout
  - Print Detail
  - Print Event Information
- Buttons:** Create, Rebuild This Invoice

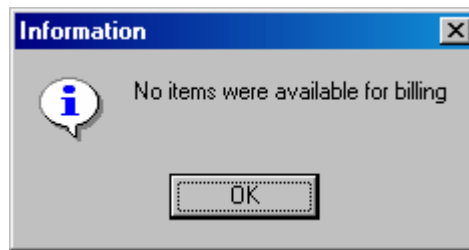
The first pieces of information needed for creating any invoice are the client and which event of that client you wish to bill for. The top most section of this form lets us choose these. First select a client from the drop down list. Then select an event number from the drop down list. If you wish to only create items for a certain date range of that event, click the "Only Subevents in this range" option and select a start and an end date. This will restrict the billing for only subevents that fall into that range. It will include the start and end dates as well. For example, if you select event number 50, check the "Only Subevents in this range" option, and then select a start date of 1/1/2004 and an end date of 1/10/2004, FASTbook would create an invoice with items that were on the first (1/1/2004) and items that were on the 10th (1/10/2004) and any items in between. Once you have selected the criteria you wish to use, press the Create button. This will assign the event number to the invoice and begin invoice creation. During invoice creation the following happens:

- All unbilled items, in your selected range, are assigned to this invoice.
- All unassigned payments are assigned to this invoice.
- If this is the first invoice for this event, all the charges you have set as default will be created for this invoice.

This dialog box is used to specify a date range for subevents. It contains the following fields:

- Client:** T S Trade Shows (dropdown)
- Event Number:** (empty dropdown)
- Only Subevents in this range:**  (checkbox)
- Start:** 08/34/2004 (dropdown)
- End:** 08/04/2004 (dropdown)
- Button:** Create

If nothing was available to be assigned to a new invoice, you will see this dialog box.



If an invoice was created, FASTbook will enable the rest of the window for you to further edit the invoice if necessary.

A snippet of an invoice form. It features three fields: "Title:" with a dropdown menu showing "Invoice"; "Invoice Number:" with a text input field containing "5520"; and "Invoice Status:" with a dropdown menu showing "Draft".

Every invoice by default is labeled as "Invoice." This can be changed to say "Credit Memo", "Settlement", "Pro Forma Invoice", or whatever you desire. This is on a per invoice basis. If you change the title for this invoice, the next invoice you create will again be titled "Invoice" and will need to be changed again if needed.

There are three options for invoice numbers.

1. You can use the event number as the invoice number.
2. You can use a system generated invoice number.
3. You can type in your own invoice number for every invoice.

If you elected to use the first choice, remember that this will limit the number of invoices per event to one, unless you implement using a hyphen and a revision number or sequence number, after the event number. For instance, event number 50 will have its first invoice with the number 50 and its second invoice with 50-1 or 50\_1 to prevent having two invoices with the same number in the system. Caution must be taken when using this method.

If you elect to use the second option, then a system generated number will be used for each new invoice. System generated numbers start at a base number and increment one number for every new invoice. System generated invoice numbers are the most ideal solution as they assure traceability for every invoice.

If you elect to use the third option, typing in your own invoice number, then FASTbook will use your number as the invoice number. If you are managing your own number list, make sure you have a method of keeping track of what has been used and for what, so as to not use the wrong invoice number on the wrong event or any similar issues.

The invoice status follows the Invoice number. Invoice status specifies how an invoice should be treated. All new invoices are first created with a status of Draft. Draft invoices are still in a working mode and can have charges assigned, charges removed, be recalculated, and have values changed. Once a draft invoice will need no more changes made and is ready to be released to a client, it is marked Final. Final invoices cannot be edited. They have no watermark on their printout as well. This will prevent any accidental changes to an invoice that has been sent to a client. When an invoice is finalized and if the option is selected in setup, a payment record will be generated of the type "Invoice." It will be created for the balance due of the invoice. The charges of final invoices will show up in the invoice totals section of the Event Detail form. Final Invoices are generally never edited again. This is due to the fact that once an invoice is Final, it has most likely been sent to a client. If a finalized Invoice must be edited again, you can do so with the Return To Draft feature on the Invoices Tab, or by simply selecting Draft from the Invoice Status drop down. The last status is Void. Void means the invoice has been nullified. All payments assigned to that invoice go back into the general pool of available payments and all items are again available for new invoice creation. Void invoices bear a watermark stating their status. Void invoices can only be unvoided by the system Supervisor. This is NOT recommended as the items that were assigned to it have been disassociated and returned to the

general pool of available items. If you must unvoid an invoice, do so only to change header information and then revoid the invoice.

The remainder of the screen contains general information about the Invoice. Here you can enter the following information:

- **Remit To Address** - This is the address you wish your client to reply to when inquiring or paying this item. This will default to the facility's address. You can use preset addresses by clicking on the drop down next to the edit box.
- **Notify Person** - This is the user in FASTbook you wish them to direct their inquiries to. This defaults to the event's coordinator.
- **Statement Date** - This is the date the invoice was created. This defaults to today's date.
- **Payment Due Date** - This is the date that payment on the invoice is due. This is calculated based on the payment terms.
- **Payment Terms** - These are the terms for this invoice. This is defaulted based on the payment terms assigned to the client you selected for the invoice.
- **The PO Number** - This is the PO number associated with this invoice. This is defaulted to the PO Number designated in Event Detail.
- **Print Payment Information** - This indicates whether or not you want to print payment information, if available, for this invoice.
- **Print Section Breakout** - This indicates whether or not you want to print a section breakout after each resource section on the invoice printout.
- **Print Detail** - This indicates whether or not you want to print a detail list of each item for every resource on the invoice printout.
- **Print Event Information** - This indicates whether or not you want to print basic event information at the top of the invoice printout.

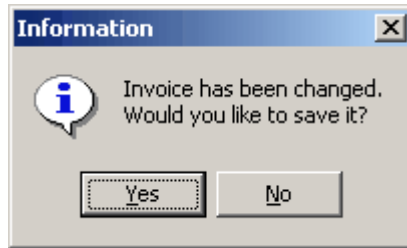
Remit To	Mesa Centennial Center Accounts Payable Dept. 540 W Iron Avenue Suite 204 Mesa, AZ 85210
Notify	ESM
Statement Date	08/04/2004
Payment Due Date	09/03/2004
Payment Terms	1
PO Number:	
<input checked="" type="checkbox"/> Print Payment Information <input checked="" type="checkbox"/> Print Section Breakout <input checked="" type="checkbox"/> Print Detail <input checked="" type="checkbox"/> Print Event Information	

- **Bill To Address** - This is the address of your client to which you will be sending this invoice. It defaults to either the contact or client address depending on which option you have set in [Invoice Setup](#).
- **Attention** - This is the person at the Bill To address to whom's attention it will be made.
- **Special Terms / Custom Invoice Note** - This is a custom note for this invoice that will print at the top of the invoice printout.
- **Contract Number** - This is the contract number associated with this event. It will default to the contract number that was entered in Event Detail.
- **Footer** - This is the invoice footer for this invoice. It will appear at the bottom of every page of the invoice printout. It defaults to the default invoice footer you have selected in [Invoice Setup](#).


Bill To:	
Attn:	Phil Miner
Special Terms / Custom Invoice Note	
Contract:	
Footer:	Don't forget to pay us promptly.
<input type="button" value="Rebuild This Invoice"/>	



Once all information has been entered as you would like it, you can save your changes by pressing the check mark button at the top of the form. If you attempt to leave the tab before you have saved your changes, you will be prompted as to whether or not you wish to do so.

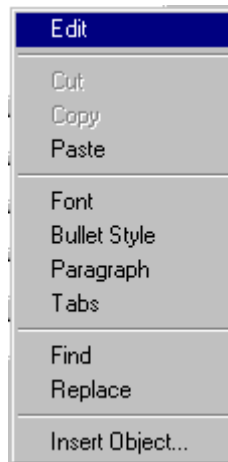


At the bottom of this form is a button labeled "Rebuild This Invoice". This can be used on Draft Invoices to remove all items (payment records, resource charges, and additional charges / discounts / taxes) and then add everything available onto the invoice. This may be necessary to show charges that have been added or changed since you first created the invoice.

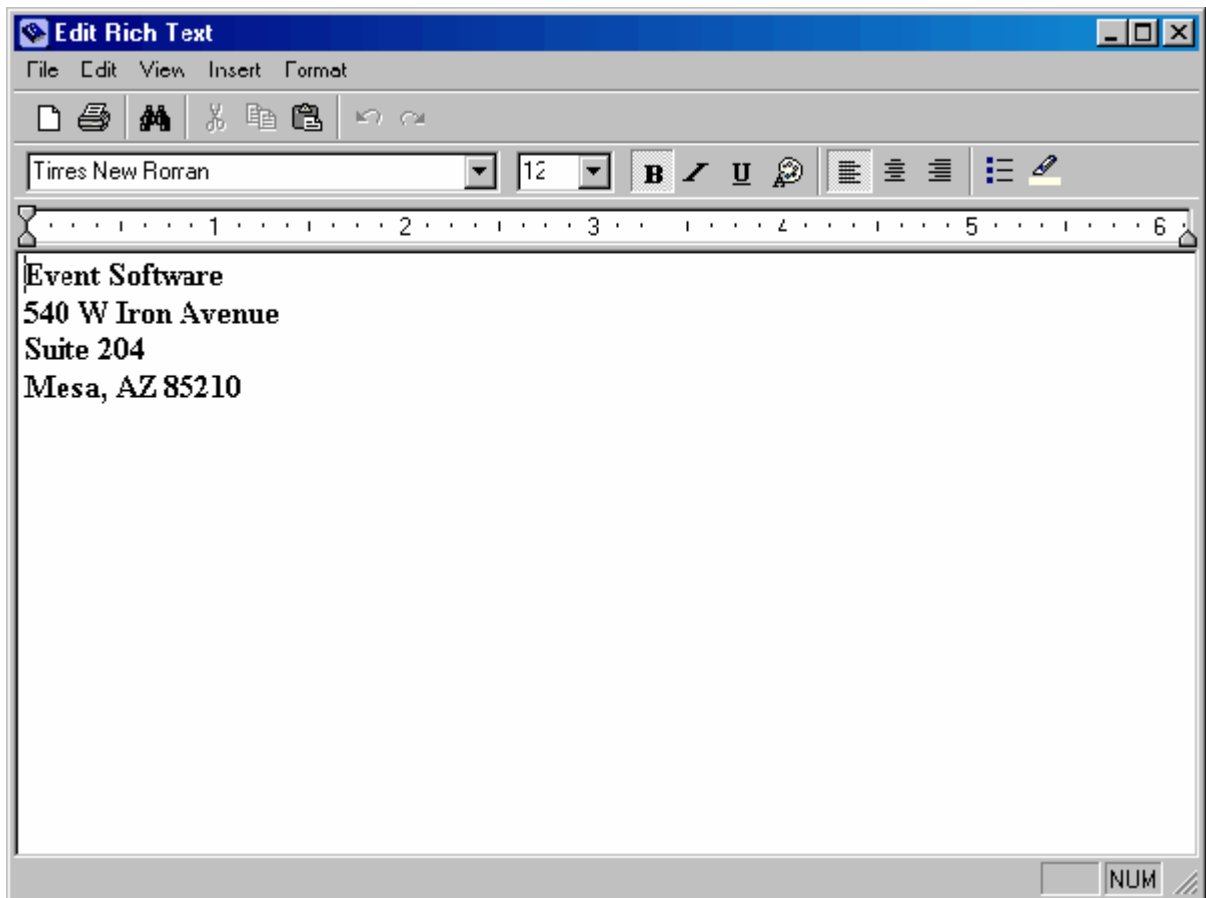
A rectangular button with a light gray background and a dark gray border, containing the text "Rebuild This Invoice".

**Note:**

When editing the Remit To, Bill To, Special Terms, and Footer fields, you can right click in the edit box and access the following menu.



These options will assist you in editing Rich Text fields. The Edit option will bring you into a Rich Text editor that will look like the following image.



After you are satisfied with what you have written you can close out and save your changes. This is included to add some ease of use and familiarity when entering information in Rich Text Format (RTF.)

### 8.2.3 Invoice Details Tab

The Invoice Details tab is used to assign and unassign charges to an invoice. Here all available charges for this invoice are listed in a tree format with a check box in front of each. You can check or uncheck those charges you wish to bill or not bill.

Item	Total Charge
<input type="checkbox"/> Event 235 {Traffic Safety Taught With Humor}	<b>\$80.00</b>
<input checked="" type="checkbox"/> Room Charges	<b>\$80.00</b>
<input checked="" type="checkbox"/> Kaweah A 11/4/1998	\$80.00
<input checked="" type="checkbox"/> Taxes	<b>\$0.00</b>
<input checked="" type="checkbox"/> County Services Tax	\$0.00

When you first enter the Invoice Details tab you will see all charges available for this invoice. If you have not selected the option to initially collapse the tree, you will see a list of all items for the invoice. If you have chosen the option to initially collapse the tree, you will only see the sum of the various type of charges, such as the picture below.

Item	Total Charge
▼ ☆ Event 5920 {Henry Ford}	<b>\$19142.00</b>
▶ <input checked="" type="checkbox"/> 🏠 Room Charges	<b>\$4650.00</b>
▶ <input checked="" type="checkbox"/> 📺 Equipment Charges	<b>\$913.50</b>
▶ <input checked="" type="checkbox"/> 🍷 Meal Charges	<b>\$9150.00</b>
▶ <input checked="" type="checkbox"/> 👷 Labor Charges	<b>\$4428.50</b>

Deferring billing is very simple with this invoice. To defer an item you simply uncheck it. If, for instance, you wanted to defer billing of room and equipment charges you would simply uncheck both Room Charges and Equipment Charges and then save. Your Invoice would look similar to the following.

Item	Total Charge
▼ ☆ Event 5920 {Henry Ford}	<b>\$13578.50</b>
▶ <input type="checkbox"/> 🏠 Room Charges	\$0.00
▶ <input type="checkbox"/> 📺 Equipment Charges	\$0.00
▶ <input checked="" type="checkbox"/> 🍷 Meal Charges	<b>\$9150.00</b>
▶ <input checked="" type="checkbox"/> 👷 Labor Charges	<b>\$4428.50</b>

Check the charges you want to bill. You can also l

In the image below, some rooms have been checked and some rooms have been unchecked. Only checked items will be billed on this invoice. The right column labeled Total Charge will show the effective charge for that item on this invoice. Unchecked items will have an effective charge of zero since they will not be billed. In the Total Charge column, bold indicates a strictly summation field, and blue indicates the effective Event Total Charge for this invoice. Unchecking an item will uncheck any "child" items under it on the tree. Alternately, checking an item will check all its "child" items in the tree.

Item	Total Charge
▼ ☆ Event 5920 {Henry Ford}	<b>\$19142.00</b>
▼ <input checked="" type="checkbox"/> Room Charges	<b>\$4650.00</b>
<input checked="" type="checkbox"/> RM A 8/26/2002	\$310.00
<input checked="" type="checkbox"/> RM B 8/26/2002	\$1860.00
<input type="checkbox"/> RM D 8/28/2002	\$0.00
<input type="checkbox"/> RM A 8/30/2002	\$0.00
<input type="checkbox"/> RM B 8/27/2002	\$0.00
<input type="checkbox"/> RM B 8/30/2002	\$0.00
<input checked="" type="checkbox"/> RM A 11/20/2002	\$310.00
<input checked="" type="checkbox"/> RM A 12/18/2002	\$310.00
<input checked="" type="checkbox"/> # Room Character Nm 8/27/2002	\$1860.00
▶ <input checked="" type="checkbox"/> Equipment Charges	<b>\$913.50</b>
▶ <input checked="" type="checkbox"/> Meal Charges	<b>\$9150.00</b>
▶ <input checked="" type="checkbox"/> Labor Charges	<b>\$4428.50</b>

For easy viewing an item that has "child" items can be collapsed by clicking the triangle button in front of the item. This will effectively hide all its children until you wish to display them by clicking the triangle button again. You can also hide and unhide "child" items by double clicking the line.

The controls on the bottom are used for adding and removing charges from the invoice. Select the Charge / Discount / Tax you wish to add from the drop down list and press the Add Charge / Discount / Tax button. To remove a charge, highlight the charge by clicking it in the tree view and press the Remove Charge / Discount / Tax button.

Early Arrival Setup ▼	Add Charge / Discount / Tax
Recalculate All Items	Remove Charge / Discount / Tax

Also, at the bottom of the form is a "Recalculate All Items" button. This can be used on Draft Invoices to remove all items (payment records, resource charges, and additional charges / discounts / taxes) and then add everything available back onto the invoice. This will be necessary to show charges that have been added or changed since you first created the invoice.


Recalculate All Items
-----------------------

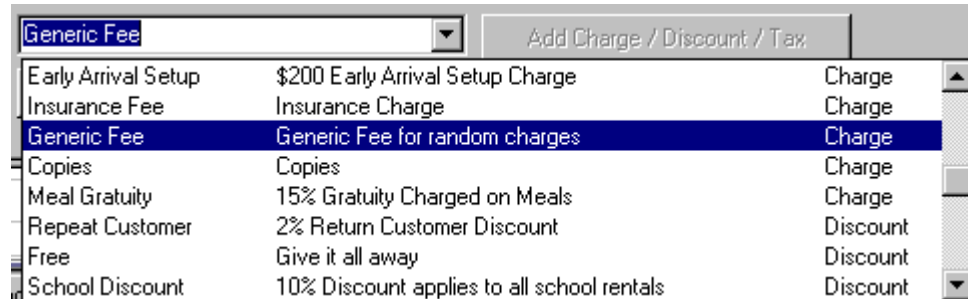
### 8.2.3.1 Adding and Removing Charges

At the bottom of the screen are some controls you can use to add or remove charges, discounts and taxes to the items on the tree.

Early Arrival Setup ▼	Add Charge / Discount / Tax
Recalculate All Items	Remove Charge / Discount / Tax

You can add a charge / discount / tax at any level of the event. You may add it the to entire event by

first selecting the event item designated with the star  icon, and then clicking the Add Charge / Discount / Tax button. You may add it to a group of resources, such as all Room Charges by selecting the Room Charges item and then adding the charge. You can also add a charge to only a single resource such as one room by selecting that room and then adding a charge. When adding a charge, simply select the charge from the drop down and then click "Add Charge / Discount / Tax."










Charges can be removed by selecting the charge you wish to remove and clicking the "Remove Charge / Discount / Tax" button.

Remove Charge / Discount / Tax

The following images depict charges added at the different levels of the event.

Here is a charge added to the top most level, the Event level. Event level charges are put under header items that declare the type of charge. This charge was a tax and is added to the Taxes item.

Item	Total Charge
 <b>Event 5920 (Henry Ford)</b>	<b>\$20481.94</b>
<input checked="" type="checkbox"/>  <b>Room Charges</b>	<b>\$4650.00</b>
<input checked="" type="checkbox"/>  <b>Equipment Charges</b>	<b>\$313.36</b>
<input checked="" type="checkbox"/>  <b>Meal Charges</b>	<b>\$9150.00</b>
<input checked="" type="checkbox"/>  <b>Labor Charges</b>	<b>\$4428.50</b>
<input checked="" type="checkbox"/>  <b>Taxes</b>	<b>\$1339.94</b>
<input checked="" type="checkbox"/>  County Services Tax	\$1339.94

The next charge was added to only Room Charges. There is no Taxes item on anything other than the event level item. All charges that appear on any other level will not have a header category such as Taxes. They will just be put under the item. This is to save screen space and reduce on screen clutter.

Item	Total Charge
★ Event 5920 {Henry Ford}	<b>\$20830.22</b>
<input checked="" type="checkbox"/> Room Charges	<b>\$4975.50</b>
<input checked="" type="checkbox"/> RM A 8/26/2002	\$310.00
<input checked="" type="checkbox"/> RM B 8/26/2002	\$1860.00
<input type="checkbox"/> RM D 8/28/2002	\$0.00
<input type="checkbox"/> RM A 8/30/2002	\$0.00
<input type="checkbox"/> RM B 8/27/2002	\$0.00
<input type="checkbox"/> RM B 8/30/2002	\$0.00
<input checked="" type="checkbox"/> RM A 11/20/2002	\$310.00
<input checked="" type="checkbox"/> RM A 12/18/2002	\$310.00
<input checked="" type="checkbox"/> # Room Character Nm 8/27/2002	\$1860.00
<input checked="" type="checkbox"/> County Services Tax	\$325.50
<input checked="" type="checkbox"/> Equipment Charges	<b>\$913.50</b>
<input checked="" type="checkbox"/> Meal Charges	<b>\$9150.00</b>
<input checked="" type="checkbox"/> Labor Charges	<b>\$4428.50</b>

This last image is a charge that was added only to a specific item. In this case, the item is a room.

Item	Total Charge
★ Event 5920 {Henry Ford}	<b>\$20855.07</b>
<input checked="" type="checkbox"/> Room Charges	<b>\$4998.72</b>
<input checked="" type="checkbox"/> RM A 8/26/2002	\$331.70
<input checked="" type="checkbox"/> County Services Tax	\$21.70
<input checked="" type="checkbox"/> RM B 8/26/2002	\$1860.00
<input type="checkbox"/> RM D 8/28/2002	\$0.00
<input type="checkbox"/> RM A 8/30/2002	\$0.00
<input type="checkbox"/> RM B 8/27/2002	\$0.00
<input type="checkbox"/> RM B 8/30/2002	\$0.00
<input checked="" type="checkbox"/> RM A 11/20/2002	\$310.00
<input checked="" type="checkbox"/> RM A 12/18/2002	\$310.00
<input checked="" type="checkbox"/> # Room Character Nm 8/27/2002	\$1860.00
<input checked="" type="checkbox"/> County Services Tax	\$327.02
<input checked="" type="checkbox"/> Equipment Charges	<b>\$913.50</b>
<input checked="" type="checkbox"/> Meal Charges	<b>\$9150.00</b>

Some charges are not always the same for every invoice and may need to be edited. Rather than forcing you to create a new charge for each invoice, FASTbook allows you to edit the charge for only that invoice. This will leave your default charge's value to the value you have in setup and assign a new charge for only this invoice. Also, you can rename a charge for only this invoice as well. For example, there is a charge in setup called "Generic Fee." It is used as a catch-all fee to be added to events. The name and amount of this fee changes for nearly every event. For this event, we will change it to reflect a "Renamed Fee for this event" and change its default charge from 25 dollars to 55 dollars.

First we add the "Generic Fee" charge.

Item	Total Charge
▼ <b>Event 5920 {Henry Ford}</b>	<b>\$19167.00</b>
▶ <input checked="" type="checkbox"/> <b>Room Charges</b>	<b>\$4650.00</b>
▶ <input checked="" type="checkbox"/> <b>Equipment Charges</b>	<b>\$913.50</b>
▶ <input checked="" type="checkbox"/> <b>Meal Charges</b>	<b>\$9150.00</b>
▶ <input checked="" type="checkbox"/> <b>Labor Charges</b>	<b>\$4428.50</b>
▼ <input checked="" type="checkbox"/> <b>Additional Charges/Discounts</b>	<b>\$25.00</b>
<input checked="" type="checkbox"/> <b>Generic Fee</b>	\$25.00

Then, clicking in the name field will highlight that field. Clicking once more, we are taken into an edit box for that charge name. "Renamed Fee for this event" is typed over "Generic Fee."

Item	Total Charge
▼ <b>Event 5920 {Henry Ford}</b>	<b>\$19167.00</b>
▶ <input checked="" type="checkbox"/> <b>Room Charges</b>	<b>\$4650.00</b>
▶ <input checked="" type="checkbox"/> <b>Equipment Charges</b>	<b>\$913.50</b>
▶ <input checked="" type="checkbox"/> <b>Meal Charges</b>	<b>\$9150.00</b>
▶ <input checked="" type="checkbox"/> <b>Labor Charges</b>	<b>\$4428.50</b>
▼ <input checked="" type="checkbox"/> <b>Additional Charges/Discounts</b>	<b>\$25.00</b>
<input checked="" type="checkbox"/> <b>Renamed Fee for this event</b>	\$25.00

Check the charges you want to bill. You can also highlight an

Then, the same is done for the Total Charge field. Click in once to highlight, then a second time to indicate we wish to change that field.

Item	Total Charge
▼ ☆ Event 5920 {Henry Ford}	<b>\$19167.00</b>
▶ <input checked="" type="checkbox"/> 🏠 Room Charges	<b>\$4650.00</b>
▶ <input checked="" type="checkbox"/> 📺 Equipment Charges	<b>\$913.50</b>
▶ <input checked="" type="checkbox"/> 🍷 Meal Charges	<b>\$9150.00</b>
▶ <input checked="" type="checkbox"/> 👷 Labor Charges	<b>\$4428.50</b>
▼ <input checked="" type="checkbox"/> 🎟 Additional Charges/Discounts	<b>\$25.00</b>
<input checked="" type="checkbox"/> 🎟 Renamed Fee for this event	<input type="text" value="55.00"/>

After we have the new values we want, we can save or simply click out of the field to make our changes permanent. While editing you can press ENTER to keep your changes or ESCAPE to cancel them. Charges for rooms, equipment, meals, and labor may not be changed here. Those must be changed in Event Detail.

#### 8.2.4 Preview Tab

The Preview Tab is used to view the Invoice printout before you decide to print or email it. This form works like most other preview screens you have used. You can scroll through the various pages of the printout, zoom in or out of the printout, and print or email the printout.



Invoices Invoice Header Invoice Details Preview Invoice Setup

1

Event Software Development  
222 Main Street  
Building 3  
Anytown, USA 23000

Invoice Page 1 of 2  
Number 5920  
Statement Date 08/04/2004

Bill To: **E F S FOOD SAFETY COUNCIL**  
1117 Mirror Ave  
Sanford, CA 91330  
78 A

Remit To: **Mesa Centennial Center**  
**Accounts Payable Dept.**  
**540 W Iron Avenue**  
**Suite 204**

Attn: Heather Schmitt Notify JIM

PO Number	Contract Number	Terms	Payment Due	Amount Due
		2% net	9/3/2004	\$19,142.00

Event Information				
Event Name	Event Number	Attendance	Ticket Total	Sales Representative
Henry Ford	5920			

Room Charges						
Date	Day	Room Name	Acct Code	Start	End	Amount
8/26/2002	Mon	FM A		8:00 AM	11:00 AM	\$310.00
8/26/2002	Mon	FM B		8:00 AM	5:00 PM	\$1,860.00
8/27/2002	Tue	# Room Character Nm 1234		8:00 AM	5:00 PM	\$1,860.00
11/20/2002	WWed	FM A		8:00 AM	11:00 AM	\$310.00
12/10/2002	WWed	FM		0:00 AM	11:00 AM	\$310.00
						\$4,650.00
						\$4,650.00
						\$4,650.00

Review Copy

The tool bar at the top allows you to interact with the on-screen printout. From the left the controls are Print, First Page, Prior Page, Current Page Number, Next Page, Last Page. The zoom buttons are then Fit to Whole Page, Fit to Page Width, and Fit to 100%.




The last button is used to email the printout.

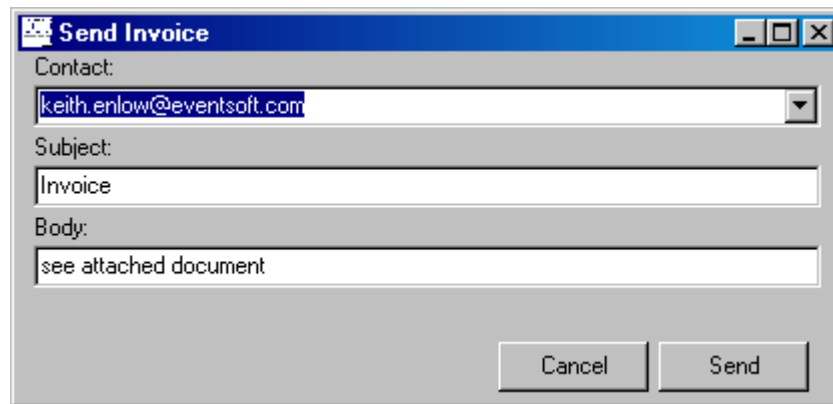


When you click the email button you can, instead of printing the invoice, send it electronically to its recipient.

#### 8.2.4.1 Emailing an Invoice

You may wish to electronically transfer your invoice rather than printing a copy and sending it through the post.

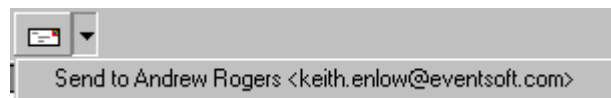
By clicking the Email button  you are presented with a small dialog window. This allows you to select which of the contacts associated with your client you want to send the email to. Only those contacts with email addresses will appear in the list. You can also type into the list any email address you want, if you need something other than what the list provides.



The screenshot shows a dialog box titled "Send Invoice". It has three text input fields: "Contact" with the value "keith.enlow@eventsoft.com", "Subject" with the value "Invoice", and "Body" with the value "see attached document". At the bottom right, there are two buttons: "Cancel" and "Send".

The subject and body fields will default to what you have set in [Invoice Setup](#). The subject will go in the subject line of the email and the body will appear in the body line. In addition, your invoice will be attached to the email in PDF format. Make sure you have all your email settings set in FASTbook Setup before attempting to use this feature.

To improve efficiency, FASTbook provides a quick method to email the invoice. If the client contact of the event you are working with has an email address assigned and the default subject and body are acceptable, you can click the drop down on the email button and select the menu item starting with "Send to" and then the contact's name and email address. Using this option it will not prompt you for an email address, subject or body for your email. Once clicked it will just send the PDF.



If there is no email address assigned to the client contact for the event you are working with, then this option will not be available. Clicking the drop down on the Email button will result in a disabled menu item labeled "Send to <no email assigned>".



## 8.2.5 Invoice Setup Tab

Invoice Setup is the first area of Invoicing that should be visited. This is where all the default values and options are set that will allow the invoice to function in the desired manner.

Created: 02/07/2005 10:29:49 AM      Last Updated:

Created By: SUPERVISOR      Last Updated By:

Rate Type:        Inactive      Amount

Name:        Taxable       Percent Rate     

Description:        Flat Rate     

Accounting Code:

Sort Order:

Default for all new invoices:

Apply to Rooms       Apply to Meals       Apply to Entire Event

Apply to Equipment       Apply to Labor

Name	Rate Type	Description
Equipment Setup Fees	Charge	25% Early Equipment Setup
Equipment Tax	Tax	Equipment Tax
Generic Fee	Tax	Generic Fee for random charges
Meal Gratuity	Charge	15% Gratuity Charged on Meals
Nonrefun Deposit	Charge	Nonrefundable Deposit

Invoice Setup has three sections: Charges / Discounts / Taxes, Payment Terms, and Invoice.

Charges / Discounts / Taxes are the charges that may be added to an invoice. Miscellaneous fees, state taxes and return customer discounts are all examples that would fit into this category.

Payment Terms are the rules by which you expect those you bill to return payment to you. Net 30 or Pay-on-delivery would fall into this category.

The last tab in Invoice Setup is simply labeled Invoice. This holds all the options for Invoicing. From this tab, the invoice creation process and invoice printout can be tailored to achieve a number of desired results.

### 8.2.5.1 Charges / Discounts / Taxes

In addition to regular resource charges (room, equipment, meals and labor), fees and discounts may need to be applied during billing. This tab is for those fees. Charges increase the amount of the invoice, while discounts decrease it. Taxes, though a subset of charges, are specified separately due to their nature. Taxes usually require special reporting and are generally calculated last.

Charges / Discounts / Taxes | Payment Terms | Invoice

Created: 02/07/2005 10:29:49 AM      Last Updated:  
Created By: SUPERVISOR      Last Updated By:

Rate Type: Tax       Inactive      Amount  
 Taxable       Percent Rate      0.065  
Name: Equipment Tax       Flat Rate      \$0.00  
Description: Equipment Tax  
Accounting Code:   
Sort Order: 0

Default for all new invoices:  
 Apply to Rooms       Apply to Meals       Apply to Entire Event  
 Apply to Equipment       Apply to Labor

Name	Rate Type	Description
Equipment Setup Fees	Charge	25% Early Equipment Setup
▶ Equipment Tax	Tax	Equipment Tax
Generic Fee	Tax	Generic Fee for random charges
Meal Gratuity	Charge	15% Gratuity Charged on Meals
Nonrefun Deposit	Charge	Nonrefundable Deposit

At the top of the tab is a navigator. This allows you to scroll forward and backward through the records. You can also insert, delete, save changes, or cancel changes. The buttons from left to right are:

First Record, Prior Record, Next Record, Last Record, Insert Record, Delete Record, Save Changes, Cancel Changes



Buttons on the navigator will become disabled (grayed out) when they are not available for use.

The next section will indicate the creation and last updated time and date of the current item. Also, you can see who performed the creation or updating.

Created: 02/07/2005 10:29:49 AM      Last Updated:  
Created By: SUPERVISOR      Last Updated By:

The body of the tab contains general information about the charge / discount / or tax.

Rate Type:	<input type="text" value="Tax"/>	<input type="checkbox"/> Inactive	Amount
Name:	<input type="text" value="Equipment Tax"/>	<input checked="" type="checkbox"/> Taxable	<input checked="" type="radio"/> Percent Rate <input type="text" value="0.065"/>
Description:	<input type="text" value="Equipment Tax"/>		<input type="radio"/> Flat Rate <input type="text" value="\$0.00"/>
Accounting Code:	<input type="text"/>	Default for all new invoices:	
Sort Order:	<input type="text" value="0"/>	<input type="checkbox"/> Apply to Rooms	<input type="checkbox"/> Apply to Meals
		<input type="checkbox"/> Apply to Equipment	<input type="checkbox"/> Apply to Labor

Name	Rate Type	Description
Equipment Setup Fees	Charge	25% Early Equipment Setup
Equipment Tax	Tax	Equipment Tax
Generic Fee	Tax	Generic Fee for random charges
Meal Gratuity	Charge	15% Gratuity Charged on Meals
Nonrefun Deposit	Charge	Nonrefundable Deposit

The information collected here is:

- **Rate Type** - This is the type of rate. Charges will increase the amount of the invoice. Discounts will decrease the amount of the invoice. Taxes will also increase the amount of the invoice, but are categorized separately then charges.
- **Name** - This the unique name of this item.
- **Description** - This is a more detailed description of the item.
- **Accounting Code** - This optional field holds the accounting code of the item.
- **Sort Order** - This is the sort order of the item. All charges are calculated from the smallest sort order to the largest. Charges before Discounts which are before Taxes. For instance, a charge with a sort order of 1 will calculate before a charge with a sort order of 3. A discount with a sort order of 1 will calculate after a charge with a sort order of 5, but before a tax with a sort order of 1. This should allow for precise ordering of calculations.
- **Inactive** - When checked, this item becomes inactive. This will prevent it from showing in drop down lists.
- **Taxable** - This marks this item as taxable. Some items are exempt from tax. If an item is exempt from tax simply uncheck this box.
- **Amount** - This is the amount of the item.
  - **Percent Rate** - A percent rate is the decimal equivalent of the rate. For example 25 percent is .25. If 25 was entered in the field then the charge would be 2500% of the original cost. Take care when assigning these. The percent is based on the net total up to the point the percent rate is applied.
  - **Flat Rate** - A flat rate is a rate that does not depend on any other calculations. These rates are static. A flat rate of \$25.00 will always be \$25.00 on any invoice (unless of course it is overridden for that invoice).
- **Defaults** - Charges / Discounts / Taxes can be automatically added to an invoice at creation time. This can ease data entry for frequently used items. Default charges are added to the first, and only the first invoice created for an event. At that time, the event is marked as having already received automatic charges and any invoice after that will need to have charges manually added.

Default for all new invoices:		
<input type="checkbox"/> Apply to Rooms	<input type="checkbox"/> Apply to Meals	<input type="checkbox"/> Apply to Entire Event
<input type="checkbox"/> Apply to Equipment	<input type="checkbox"/> Apply to Labor	

- Apply To Rooms - These items will automatically add to the Room Charges section of the invoice.
- Apply To Equipment - These items will automatically add to the Equipment Charges section of the invoice.
- Apply To Meals - These items will automatically add to the Meal Charges section of the invoice.
- Apply To Labor - These items will automatically add to the Labor Charges section of the invoice.
- Apply To Entire Event - These items will automatically add to the Event section of the invoice. If Apply to Entire Event is checked, all other defaults will deselect. This is to avoid double charging.

Once a Charge / Discount / Tax has been used on an Invoice, they can not be deleted from the system. If they will no longer be used they can be marked as inactive to prevent them from appearing in drop down boxes. This is done to preserve system integrity for Charges / Discounts / Taxes that are currently being referenced.

At the bottom of the tab is a grid that shows all Charges / Discounts / Taxes in the system. This is used to easily move from one item to another. If you click on the item in the grid you wish to work with, the fields in the body of the tab will switch to the values for that item and are ready to be modified.

Name	Rate Type	Description
<input checked="" type="checkbox"/> By one get one free	Discount	25% off
<input type="checkbox"/> Copies	Charge	Copies
<input type="checkbox"/> County Services Tax	Tax	test
<input type="checkbox"/> Early Arrival Setup	Charge	\$200 Early Arrival Setup Charge
<input type="checkbox"/> Equipment Setup Fees	Charge	25% Early Equipment Setup
<input type="checkbox"/> Free	Discount	Give it all away
<input type="checkbox"/> Generic Fee	Charge	Generic Fee for random charges
<input type="checkbox"/> Insurance Fee	Charge	Insurance Charge
<input type="checkbox"/> Meal Gratuity	Charge	15% Gratuity Charged on Meals
<input type="checkbox"/> Repeat Customer	Discount	2% Return Customer Discount
<input type="checkbox"/> Return Customer	Discount	5% Return Customer Discount
<input type="checkbox"/> School Discount	Discount	10% Discount applies to all school rentals
<input type="checkbox"/> State Sales Tax	Tax	
<input type="checkbox"/> test	Discount	test

### Creating settlement sheets

Creating settlement sheet charges is done the same way as other charges and discounts.

Click on the invoice button, then click on Charges/discounts/Taxes. Select Rate Type as Charge. Type in name and then description, click on the check mark on the navigational bar to save changes.







Terms	Description
▶ 2% net	2% Discount if paid within 10 days; Full payment due no later than 30 days from
Event Deposit	15% Deposit required 10 days prior to Event Start Date
Due On Event Close	Due on last day of Event
POD	Now
Due On Receipt	
new payment term	

### 8.2.5.3 Invoice

The Invoice tab holds all the general settings for the Invoice system. Here options can be selected or deselected to tailor the Invoice system to function as desired. These settings work for all of FASTbook and should be considered global options.

Below is an image of the tab. Next to each option is a number and each number is explained below.


The screenshot shows the following settings and their corresponding numbers:


- 1  Show Event Information on Invoice
- 2  Show Print Count on Invoice
- 3  Show Accounting Codes
- 4  Show Footer on Invoice
- 5  Show User Notification on Invoice
- 6  Show Contact on Invoice
- 7  Default to Totals Breakout
- 8  Default to Show Payment History
- 9  Default to Detail Print
- 10  Default to Contact Bill To
- 11 Invoice Footer: Don't forget to pay us promptly.
- 12  Allow Values of Zero
- 13  Use Overlay for Void and Draft Invoices
- 14  Use System Generated Invoice Number
- 15  Use Event Number as Invoice Number
- 16  Collapse Resource Charges by Default
- 17  Autocreate Payment Records For Invoices
- 17.b  Create New Payment for Remainder When Not Paid in Full
- 18 Invoice Center Name: Event Software Development
- 19 Bill To Vertical Offset: 0
- Invoice Title Font Size: 12
- 20 Invoice mail subject: Invoice
- 21 Invoice Mail Body: see attached document
- 22 Start Next Invoice at: 0

1. Show Event Information on Invoice - This designates whether or not to show general event information on the event, such as Event Name, Attendance, Sales Person, and Ticket Totals.
2. Show Print Count On Invoice - When enabled, this will tell the invoice to write the number of times the invoice has been printed at the top of the invoice. This only prints for the second and greater printings. The first printout will not show the number printed. This is only for printings subsequent to the first.
3. Show Accounting Codes - This tells the invoice to print account codes next to item names. For Equipment, Meals, and Labor, the account code will take the place of the room name field on the invoice printout.
4. Show Footer on Invoice - This designates whether or not the footer will print on the bottom of each invoice.
5. Show User Notification on Invoice - This tells the invoice to print the notification person at the Remit To address on the invoice. The notification person is defaulted to the Event Coordinator.
6. Show Contact on Invoice - This tells the invoice to print the contact name on the invoice below the Bill To. It is labeled as "Attention."
7. Default to Totals Breakout - When this is checked, all new invoices will be defaulted to show a section breakout. This can be disabled on individual invoices.
8. Default to Show Payment History - When this is checked, all new invoices will be defaulted to

- show payment history for the invoice. This can be disabled on individual invoices.
9. Default to Detail Print - When this is checked, all new invoices will be defaulted to show resource details. This can be disabled on individual invoices.
  10. Default to Contact Bill To - When this is checked, all new invoices will be defaulted to the Contact Bill To rather than the Client's. This can be overridden on individual invoices.
  11. Invoice Footer - This is the default Invoice footer for new invoices. Once a new invoice has been created, the footer can be edited for that invoice.
  12. Allow Values of Zero - When this is checked, charges with a value of \$0.00 (zero dollars) will be added to new invoices as line items.
  13. Use Overlay for Void and Draft Invoices - (Recommended Option) When this is checked, all Void and Draft invoice will bear a watermark on their printout and print preview. This can prevent the accidental sending of invalid invoices. Draft invoices will state "Review Copy Do Not Pay", while Void invoices will state "Voided Invoice Do Not Pay."
  14. Use System Generated Invoice Number - The tells new invoices to use a system generated invoice number by default. This option can not be used in conjunction with "Use Event Number as Invoice Number". One or the other or neither must be used.
  15. Use Event Number as Invoice Number - This tells new invoices to use the event number that the invoice is referencing as the invoice number by default. This option can not be used in conjunction with "Use System Generated Invoice Number". One or the other or neither must be used.
  16. Collapse Resource Charges by Default - This will collapse all nodes of the Invoice Details tree by default. The nodes can still be expanded by clicking on their triangle button. This is used when a facility generally only works with resource charges as a whole, rather than individual resource charges.
  17. Autocreate Payment Records For Invoices - With this enabled, a payment record for the balance due of the invoice is autocreated for the invoice upon finalization. 17.b When this is selected, If the autocreated payment is not paid in full, a new payment record will be created for the amount still owed for the invoice.
  18. Invoice Center Name - This is where you can choose a different name to appear on invoice.
  19. Invoice Mail Subject - This is the default email subject used when sending invoices through email.
  20. Invoice Mail Body - This is the default email body used when sending invoices through email.
  21. Bill To Vertical Offset - This is used to adjust the spacing of the Bill To address to assist it positioning correctly for windowed envelopes.
  22. Start Next Invoice At - In order to start invoices at a certain number, the desired number must be specified here. The apply button is then pressed to make the change. Starting invoice numbers must be greater than the last number used for an invoice. If an invalid number is specified and Apply is pressed, the box will fill with the last number in the system. If the new number was accepted it will show you the next number available for creation, which would be the number that was just entered.



Once all the desired options have been set, changes can be saved by pressing the check mark button  at the top of the window.

If it is desired to abort any new changes, the cancel button , at the top of the window, can be pressed to revert back to the original values.

### 8.3 Event Detail Invoices Tab

In the financial tab of Event Detail on the left side are three tabs. The bottom most tab, labeled "Invoices", will take you to the invoice section of Event Detail. In this section, simple quick invoice operations can be performed. If a detailed heavily modified invoice is desired, then use the Invoicing

Form available from the main button bar; however, if a simple invoice using default charges is what is needed, this is the fastest place to create it. Invoices can also be finalized, voided, recalculated and printed from this tab.

Rooms   Equipment   Meals   Labor   Outline   <b>Financial</b>   Custom   Ticklers   Presenter   Attachments   Tickets								
General Info	Invoices							
	Room	Equipment	Labor	Meal	<b>Resource Total</b>			
	\$370.00	\$150.00	\$0.00	\$0.00	\$520.00			
	Other Charges				\$0.00			
	<b>Total Billed</b>				\$520.00			
	Total Paid				\$0.00			
	Balance Due				\$520.00			
	<input type="button" value="Create New Invoice For This Event"/>							
	Payments							
Invoices	Invoice Number	Statement Date	Total	Status	Finalize	Void	Recalc	Print
	6264	08/04/2005	\$520.00	Void				
	69	08/04/2005	\$520.00	Final				
	69_1	08/04/2005	\$11.98	Draft				

### 8.3.1 Billing Totals

The top section of this tab displays the totals for what has already been billed. Only the totals of finalized invoices will show here. If a Draft invoice has been created, its totals will not be reflected here until it has been finalized.

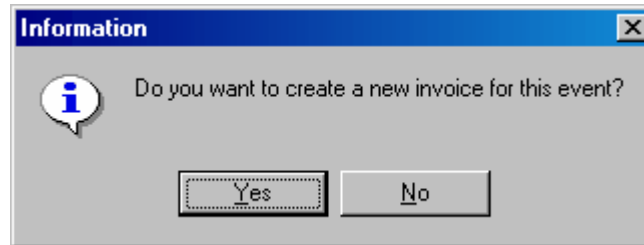
Room	Equipment	Labor	Meal	<b>Resource Total</b>
\$370.00	\$150.00	\$0.00	\$0.00	\$520.00
Other Charges				\$0.00
<b>Total Billed</b>				\$520.00
Total Paid				\$0.00
Balance Due				\$520.00
<input type="button" value="Create New Invoice For This Event"/>				

- Room - Shows the total room charges that have been billed.
- Equipment - Shows the total equipment charges that have been billed.
- Labor - Shows the total labor charges that have been billed.
- Meal - Shows the total meal charges that have been billed.
- Resource Total - This is the sum of Room, Equipment, Labor, and Meal charges.
- Other Charges - This shows any other amount that is not a Room, Equipment, Labor, or Meal charge.
- Total Billed - This is the sum of Resource Total and Other Charges.

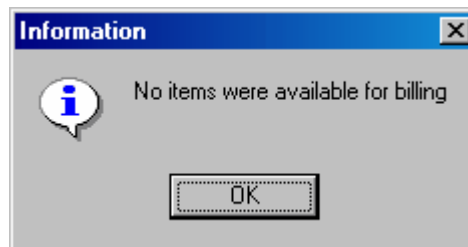
- Total Paid - This is the sum of all payments received on this event.
- Balance Due - This is the difference between Total Billed and Total Paid.

**Remember, only Final invoices' amounts will reflect in these totals.**

Below the Billing Totals and above the Invoice Grid is the Create New Invoice For This Event button. This button can be used to create an invoice for this event using all the default values and not prompting for any other information. The invoice can then be used as is or edited further in the [Invoicing Form](#). All new invoices are created with a Draft status. Before attempting to create an invoice, FASTbook will show a dialog asking if this is what is desired to be done.



Selecting "No" will cancel the invoice creation process. Selecting "Yes" will instruct FASTbook to investigate the event for any unbilled items, items that have had their charges changed, and/or items that were on previous invoices that have been voided and are not ready to be invoiced again. If nothing was found to place onto an invoice, the following dialog will appear indicating that no items were available for billing.



If items were found, a Draft invoice is created and it is reflected in the Invoice Grid.

### 8.3.2 Invoice Grid

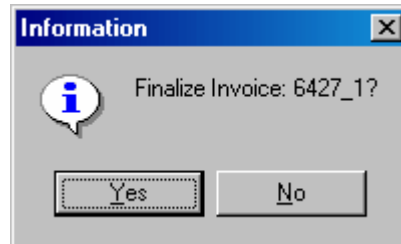
The Invoice Grid allows quick access to frequently used invoice functions and displays a list of invoices for the event that is currently displayed in Event Detail. On this grid, invoice status is not only displayed under the "Status" column, but also by the coloring of the line. Void invoices appear red and with a strike-out font. Draft invoices are green. Finalized invoices show in black. Double clicking on any invoice in this grid will bring up the Invoice Form with that invoice selected, and ready for editing.

Invoice Number	Statement Date	Total	Status	Finalize	Void	Recalc	Print
<del>6264</del>	08/04/2005	<del>\$520.00</del>	<del>Void</del>				
69	08/04/2005	\$520.00	Final				
69_1	08/04/2005	\$11.98	Draft				

The buttons on the right of each line allow quick actions to be performed on the invoice.

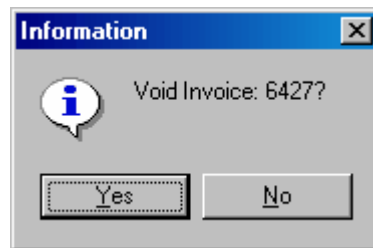


The first button, displayed with the lock, will finalize a Draft invoice. Finalizing an invoice locks in its current values and prevents it from being changed. If the Finalize button is pressed on an invoice that is in Draft status, a dialog box will appear asking whether or not this action is to be performed.

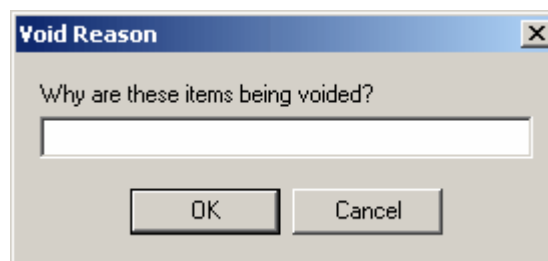


Selecting "No" will cancel the finalization. Selecting "Yes" will finalize the invoice. The Invoice Grid will then be refreshed to show the change in status.

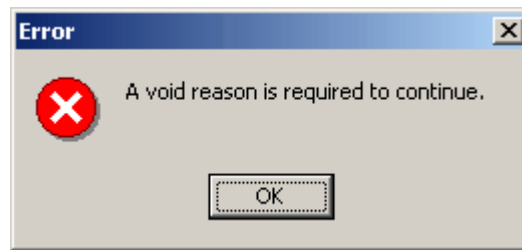
The next button is the void button, displayed with a slashed red circle. This will void a Draft or Finalized invoice. If the Void button is pressed on a Draft or Finalized invoice, a dialog box will appear asking whether or not this action is to be performed.



Selecting "No" will cancel the void. Selecting "Yes" will proceed with voiding the invoice. A dialog box will then appear prompting for a reason for the void.

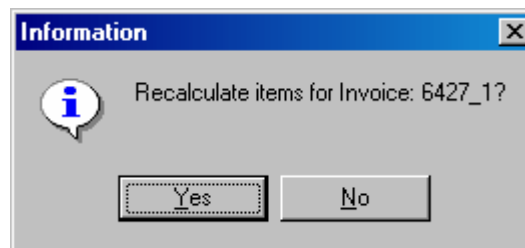


Selecting "Cancel" will abort the void and present a dialog informing that void reasons are required when voiding an invoice.



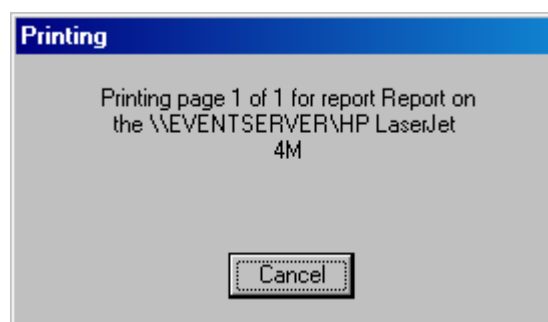
Entering a valid void reason, will enable FASTbook to proceed with the void. All the invoices charges will be again available for any new invoices. The Invoice Grid will then be refreshed to show the change in status.

The next button, displayed with the calculator, is the Recalculate button. This button can be used on Draft Invoices to remove all items (payment records, resource charges, and additional charges / discounts / taxes) and then add everything available back onto the invoice. This may be necessary to show charges that have been added or changed since you first made the invoice. Pressing the Recalculate button, will display a confirmation dialog asking whether the recalculation is to take place.




Selecting "No" will cancel the recalculation. Selecting "Yes" will proceed with recalculating the invoice. The Invoice Grid will then be refreshed to show the change in total, if any.

The last button is the print button, with the printer icon. This will print the invoice to the default printer. To print to a different printer, or to email the invoice, the print features on the [Invoicing Form](#) must be used. Pressing print will display a print dialog and the invoice will be printed.



## 8.4 Invoice Report

The invoice printout is the final product of invoice creation. This printout can be printed, saved to a file, emailed, or any combination of these.

 <b>Event Software Development</b> 123 Main Street Phoenix, AZ 85001 Phone: (602) 555-1234		Invoice Page 1 of 1 Number: 6427_1 Statement Date: 03/04/2004				
Bill To:		Remit To: Event Software 540 Wilson Avenue Suite 204 Mesa, AZ 85210				
Alt#:		Notify:				
PO Number	Contract Number	Terms	Payment Due	Amount Due		
		2% net	03/04/2004	\$575.00		
<b>Event Information</b>						
Event Name	Event Number	Attendance	Ticket Total	Sales Representative		
New Event	6427					
<b>Room Charge</b>						
Date	Day	Room Name	Acct Code	Start	End	Amount
03/18/2004	THU	A Test Room	ACT-150+	5:00 AM	3:00 PM	\$15.00
Room Total: \$15.00						
Total:						
Regular Charges: \$15.00						
Room Section Total: \$15.00						
<b>Labor Charge</b>					Amount	
Date	Description	Acct Code	Hours	Qty	Rate	
03/18/2004	Medical Tech - Standby			1	\$350.00	
Labor Total: \$350.00						
Total:						
Regular Charges: \$350.00						
Labor Section Total: \$350.00						
<b>Other Event Charge / Discounts / Taxes</b>					Amount	
Description:						
Insurance Fee					\$200.00	
Subtotal:					\$575.00	
<b>Invoice Total</b>						
Room Charges: \$15.00						
Equipment Charges: \$0.00						
Meal Charges: \$0.00						
Labor Charges: \$350.00						
Other Event Charges: \$200.00						
Grand Total: \$575.00						
Payments Received: \$0.00						
Balance Due: \$575.00						

Copyright © 2004 Event Software

In the picture below, the different parts of the printout are numbered. Following the picture are descriptions of each part.

The screenshot shows an invoice form for 'Event Software Development'. The form is divided into several sections, with numbered callouts (1-11) pointing to specific fields or sections:

- 1:** Points to the company logo and address: 'Event Software Development', '123 Main Street', 'Building 5', 'Anywhere, USA 85000'.
- 2:** Points to the invoice header information: 'Invoice', 'Page 1 of 1', 'Number: 6427 1', 'Statement Date: 08/04/2004'.
- 3:** Points to the 'Bill To:' address field.
- 4:** Points to the 'Remit To:' address field: 'Event Software', '540 W Iron Avenue', 'Suite 204', 'Mesa, AZ 85210'.
- 5:** Points to the 'Attn:' field.
- 6:** Points to the 'Notify:' field.
- 7:** Points to the 'Event Information' section header.
- 8:** Points to the 'Room Charges' section header.
- 9:** Points to the 'Acct Code' field in the Room Charges table.
- 10:** Points to the 'Totals' row in the Room Charges section.
- 11:** Points to the 'Totals' row in the Labor Charges section.

PO Number	Contract Number	Terms	Payment Due	Amount Due
		2% net	8/4/2004	\$575.00

Event Information					
Event Name	Event Number	Attendance	Ticket Total	Sales Representative	
New Event	6427				

Room Charges						
Date	Day	Room Name	Acct Code	Start	End	Amount
6/18/2009	THU	A Test Room	ACT-1504	6:00 AM	3:00 PM	\$15.00
<b>Rooms Total:</b>						<b>\$15.00</b>
<b>Totals</b>						
Regular Charges:						\$15.00
<b>Room Section Total:</b>						<b>\$15.00</b>

Labor Charges						
Date	Description	Acct Code	Hours	Qty	Rate	Amount
6/18/2009	Medical Tech - Standby			1	\$360.00	\$360.00
<b>Labor Total:</b>						<b>\$360.00</b>
<b>Totals</b>						
Regular Charges:						\$360.00
<b>Labor Section Total:</b>						<b>\$360.00</b>

1. Company Logo, Title, and Address - This displays the logo, company name and physical address. When a logo is not used the address and company name will shift to the left to take up the logo's space.
2. Invoice Header Information, Printout Title, Page Number Set, Invoice Number, Statement Date - This shows general information about the printout. The printout's title, such as Invoice or Credit Memo, the number of the printout, Statement Date, and Page Set. The Company Logo, Address, and Name, as well as the Invoice Header Information, print at the top of every page of the printout.
3. Bill To Address - This is the address the invoice is going to. This can be offset using [Bill To Vertical Offset](#) in [Invoice Setup](#).
4. Remit To Address - This is the address that remittance to the invoice should be addressed.
5. Attention Line - This is the person at the Bill To address that this printout is marked attention to. This field is optional and can be disabled in [Invoice Setup](#).
6. Notify Line - This is the person at the Remit To address who should be contacted for inquiries. This field is optional and can be disabled in [Invoice Setup](#).
7. Event Information - This is general information about the event the invoice pertains to. This can be disabled in the [Invoice Header](#) tab.
8. Resource Charges - This is a section header describing the type of charges that are about to follow.
9. Accounting Codes - This is the accounting code for the line item. These can be enabled in [Invoice Setup](#).
10. Section Breakout - This shows the sums of the different types of charges in the section. This can be disabled in the [Invoice Header](#) tab.
11. Section Total - This is the total of all charges for this section.

The next picture is also labeled with numbers and a description of each follows.



		<b>Totals</b>	
		Regular Charges:	\$360.00
		<b>Labor Section Total:</b>	<b>\$360.00</b>
<b>Other Event Charges / Discounts / Taxes</b>			
Description			
Insurance Fee			\$200.00
		<b>Subtotal:</b>	<b>\$200.00</b>
		<b>Invoice Totals</b>	
		Room Charges:	\$15.00
		Equipment Charges:	\$0.00
		Meal Charges:	\$0.00
		Labor Charges:	\$360.00
		Other Event Charges:	\$200.00
		<b>Grand Total:</b>	<b>\$575.00</b>
		<b>Payments Received:</b>	<b>\$0.00</b>
		<b>Balance Due:</b>	<b>\$575.00</b>
Don't forget to pay us promptly.			


1. Other Event Charges / Discounts / Taxes - Other charges at the event level will be displayed in this section near the bottom of the invoice.
2. Invoice Totals - These are the cumulative totals for the entire event. Payments received are shown as well as the current balance due.
3. Invoice Footer - The Invoice Footer will display at the bottom of every page of the printout.

Additionally, Payment history can be enabled in the [Invoice Header](#) tab. This will show a history of all payments that apply to this invoice. This will print just below the Additional Invoice Information fields and before the Event Information section.

Attn:		Notify:				
PO Number	Contract Number	Terms	Payment Due	Amount Due		
		2% net	8/2/2004	\$1,678.00		
<b>Payment History</b>						
Due Date	Amount Due	Type	Amount Paid	Date Paid	Method	Reference
08/03/2004	\$12.00	Payment	\$12.00	08/03/2004		
08/02/2004	\$300.00	Payment	\$300.00	08/03/2004		
<b>Total Payments</b>			<b>\$312.00</b>			
<b>Event Information</b>						
Event Name	Event Number	Attendance	Ticket Total	Sales Representative		
test	6426					

When a simple billing is required, all options can be disabled allowing for a simplistic printout.

Below is a picture of an invoice in, almost, its simplest form.

 <b>Event Software Development</b> 123 Main Street Building 5 Anywhere, USA 85000		<b>Invoice</b> <span style="float: right;">Page 1 of 1</span>		
<b>Bill To:</b> YOUTH PASTORS NETWORK 1317 W. Main St. Visalia, CA 93291		<b>Remit To:</b> Mesa Centennial Center Accounts Payable Dept. 540 W Iron Avenue Suite 204		
<b>Attn:</b>		<b>Notify:</b>		
PO Number	Contract Number	Terms	Payment Due	Amount Due
		2% net	8/2/2004	\$1,990.00
<b>Invoice Totals</b>				
Room Charges:				\$1,790.00
Equipment Charges:				\$0.00
Meal Charges:				\$0.00
Labor Charges:				\$0.00
Other Event Charges:				\$200.00
<b>Grand Total:</b>				<b>\$1,990.00</b>
<b>Payments Received:</b>				<b>\$0.00</b>
<b>Balance Due:</b>				<b>\$1,990.00</b>

## 8.5 How-to

Here are some quick How-To's for commonly used features.

- [How do I create an invoice?](#)
- [How do I finalize an invoice?](#)
- [How do I void an invoice?](#)
- [How do I recalculate an invoice?](#)
- [How do I print an invoice?](#)
- [How can I save an invoice to PDF format?](#)
- [How do I edit an existing Invoice?](#)
- [How do I email an invoice?](#)
- [How can I establish default charges for my invoices?](#)
- [How can I defer charges on an invoice?](#)
- [How can I create batches of invoices?](#)
- [How can I print multiple invoices at the same time?](#)
- [How can I edit my additional invoice charges on-the-fly?](#)

### 8.5.1 Create an Invoice

*How do I create an invoice?*

Invoices can be created in three places: in Event Detail in the Invoices Grid, on the Invoices Tab of the Invoicing Form, and in the Batch Invoices Form.

[If you wish to create an invoice on the Invoicing form, click here.](#)

[If you wish to create an invoice on the Event Detail form, click here.](#)

[If you wish to create an invoice in Batch Invoicing, click here.](#)

#### 8.5.1.1 From Within Invoicing

To create an invoice in the Invoicing form, go to the Invoices tab and click the create button. You will then be prompted to select a client and an event number of that client. If you wish to specify a date range, you can do so; then click the create button to start the process. For more information, see the [Invoices Tab](#) section.

#### 8.5.1.2 From Within Event Detail

To create an invoice from within Event Detail, go to the financial tab, and then to the invoices tab within the financial tab and click the create button. Answer "Yes" to the dialog asking if you wish to create an invoice. For more information, go to the [Event Detail: Billing Totals](#) section.

### 8.5.2 Finalize An Invoice

*How do I finalize an invoice?*

You can finalize an invoice in three places. In the Event Detail tab, on the Invoices Tab in the Invoicing Form, and on the Invoice Header Tab of the Invoicing Form.

[To finalize an invoice in Event Detail, click here.](#)

[To finalize an invoice on the Invoices Tab in the Invoicing Form, click here.](#)

[To finalize an invoice on the Invoice Header Tab in the Invoice Form, click here.](#)

#### 8.5.2.1 From Within Event Detail

To finalize an invoice from Event Detail click on the Finalize button associated with the line of the invoice you wish to finalize. Answer "Yes" when prompted if you wish to finalize. For more information, see the [Event Detail Invoice Grid](#) section.

#### 8.5.2.2 From the Invoices Tab

To finalize an invoice or invoices on the Invoices tab, click the check box in front of each item you wish to finalize and click the Finalize button. Answer "Yes" when prompted. For more information, see the [Invoices Tab](#) section.

#### 8.5.2.3 From the Invoice Header Tab

To finalize an invoice in the Invoice Header tab, click your invoice in the invoice grid. Click the edit button which will take you into the Invoice Header tab. Click the Invoice Status drop down and select Final. Click on the check mark at the top of the screen to save the change. For more information, see the [Invoice Header](#) tab section.

### 8.5.3 Void an Invoice

*How do I void an invoice?*

You can void an invoice in three places. In the Event Detail tab, on the Invoices Tab in the Invoicing Form, and on the Invoice Header Tab of the Invoicing Form.

[To void an invoice in Event Detail, click here.](#)

[To void an invoice on the Invoices Tab in the Invoicing Form, click here.](#)

[To void an invoice on the Invoice Header Tab in the Invoice Form, click here.](#)

#### 8.5.3.1 From Within Event Detail

To void an invoice from Event Detail click on the Void button associated with the line of the invoice you wish to void. Answer "Yes" when prompted if you wish to void. For more information, see the [Event Detail Invoice Grid](#) section.

#### 8.5.3.2 From the Invoices Tab

To void an invoice or invoices on the Invoices tab, click the check box in front of each item you wish to void and click the Void button. Answer "Yes" when prompted. For more information, see the [Invoices Tab](#) section.

#### 8.5.3.3 From the Invoice Header Tab

To void an invoice in the Invoice Header tab, click your invoice in the invoice grid. Click the edit button which will take you into the Invoice Header tab. Click the Invoice Status drop down and select Void. Click on the check mark at the top of the screen to save the change. For more information, see the [Invoice Header](#) tab section.

### 8.5.4 Recalculate an Invoice

*How do I recalculate an invoice?*

You can recalculate an invoice in three places. In the Event Detail tab, on the Invoices Details tab in the Invoicing Form, and on the Invoice Header Tab of the Invoicing Form.

[To recalculate an invoice in Event Detail, click here.](#)

[To recalculate an invoice on the Invoice Details Tab in the Invoicing Form, click here.](#)

[To recalculate an invoice on the Invoice Header Tab in the Invoice Form, click here.](#)

#### 8.5.4.1 From Within Event Detail

To recalculate an invoice from Event Detail click on the Recalculate button associated with the line of the invoice you wish to recalculate. Answer "Yes" when prompted if you wish to recalculate the item. For more information, see the [Event Detail Invoice Grid](#) section.

#### 8.5.4.2 From the Invoice Details Tab

To recalculate an invoice in the Invoice Details tab, click your invoice in the invoice grid. Click the edit button which will take you into the Invoice Header tab. Click the Invoice Details tab at the top of the form. Click the Recalculate All Items button at the bottom of the form. For more information, see the [Invoice Details](#) tab section.

#### 8.5.4.3 From the Invoice Header Tab

To recalculate an invoice in the Invoice Header tab, click your invoice in the invoice grid. Click the edit button which will take you into the Invoice Header tab. Click the Recalculate All Items button at the bottom of the form. For more information, see the [Invoice Header](#) tab section.

### 8.5.5 Print an Invoice

*How do I print an invoice?*

You can print an invoice in three places. In the Event Detail tab, on the Invoicing Form, and on the Preview Tab of the Invoicing Form.

[To print an invoice in Event Detail, click here.](#)

[To print an invoice on the Invoicing Form, click here.](#)

[To print an invoice on the Preview Tab in the Invoice Form, click here.](#)

#### 8.5.5.1 From Event Detail

To print an invoice from Event Detail, click on the Print button associated with the line of the invoice you wish to print. For more information, see the [Event Detail Invoice Grid](#) section.

#### 8.5.5.2 From the Invoicing Form

To print an invoice in the Invoicing Form, click your invoice in the invoice grid. Click the edit button which will take you into the Invoice Header tab and make this invoice your current working invoice. Click the print button at the top of the screen. For more information, see the [Invoicing Form](#) section.

#### 8.5.5.3 From the Preview Tab

To print an invoice in the Preview Tab, click your invoice in the invoice grid on the Invoices Tab. Click the edit button which will take you into the Invoice Header tab and make this invoice your current working invoice. Click the Preview tab at the top of the window. Click the print button at the top left of the preview tab. For more information, see the [Preview Tab](#) section.

### 8.5.6 Save an Invoice to PDF

*How can I save an invoice to PDF format?*

You can save an invoice in PDF format just like any other report in FASTbook. Simply start to print the report, and in the dialog box select "Print to File" near the bottom of the form. You can then select PDF from the drop down and type in a file name. Press Print and the file will be created.

### 8.5.7 Edit An Existing Invoice

*How do I edit an existing Invoice?*

You can edit an invoice already in the system in one of two ways.

[To edit an invoice while in Event Detail, click here.](#)

[To edit an invoice while in the Invoicing Form, click here.](#)

#### 8.5.7.1 From Event Detail

To edit an invoice from Event Detail, double-click on the line of the invoice you wish to edit. This will take you into the Invoicing form with that invoice currently ready for changes. For more information, see the [Event Detail Invoice Grid](#) section.

#### 8.5.7.2 From the Invoicing Tab

To edit an invoice in the Invoicing tab, click your invoice in the invoice grid. Click the edit button which will take you into the Invoice Header tab. You can also double click the invoice in the grid. For more information, see the [Invoice Tab](#) section.

### 8.5.8 Email an Invoice

*How do I email an invoice?*

To email an invoice, open the invoice you wish to email in the Invoicing Form. Go to the Preview tab and click the email button. You will then be prompted for an email address and permitted to send the email. For more information, see [Preview Tab Emailing an Invoice](#).

### 8.5.9 Establish Default Charges

*How can I establish default charges for my invoices?*

Default charges can be established in Invoice Setup. Simply check all the defaults that apply to each charge and save your changes. For more information, see the [Invoice Setup Charges / Discounts / Taxes](#) section.

### 8.5.10 Defer Charges

*How can I defer charges on an invoice?*

Charges are deferred by simply unchecking them in the Invoice Details tab on the Invoicing Form. For more information, see [Invoice Details Tab](#) section.

### 8.5.11 Batch Invoice Creation

*How can I create batches of invoices?*

In the Invoices tab, on the Invoicing Form, select the drop down on the Create button. Choose a method of batch invoice creations from the list. For more information, see the [Invoices Tab \(Batch Invoice by Date Range or Batch Invoice by Event Number\)](#) section.

### 8.5.12 Print Multiple Invoices

*How can I print multiple invoices at the same time?*

Multiple invoices can only be printed from the Invoices Tab of the Invoicing Form. While on that tab, check each invoice you want to print and then either click the print button, or select a menu item from the drop down on the print button. For more information, see the [Invoices Tab](#).

### 8.5.13 Edit Charges On-The-Fly

*How can I edit my additional invoice charges on-the-fly?*

Charges / Discounts / Taxes can have their charges overridden on the Invoice Details tab of the Invoice Form. Simply click in the charge field twice to enter edit mode. Type in the new charge and press enter. For more information, see [Invoice Details Adding and Removing Charges](#).

**FASTbook 5.5**

# **Chapter**



**9**

FASTbooking

## 9 FASTbooking

### 9.1 Overview

#### FASTbooking

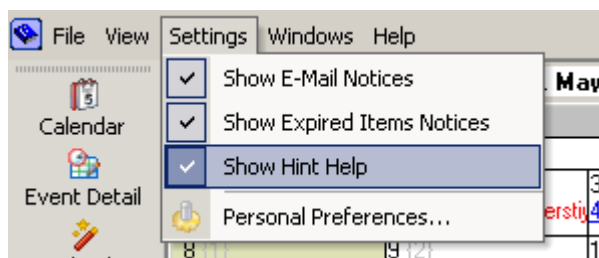
The FASTbooking module can be accessed from either the Calendar, Event Detail window, or the menu bar under 'View'.

This module contains various sophisticated innovations:

- 1) A room search feature, where you enter criteria and **FASTbook** will find the best available room(s) for you.
- 2) It allows for quick scheduling of repetitive bookings. It is very advantageous in entering essential event information and booking clients who meet on a regular basis.
- 3) Interactive and optional hints help walk you through the steps in FASTbooking.
- 4) A grid display of the rooms providing important room information at the time of booking.

There are two booking views in FASTbooking. The simple booking view allows for a quick book of a single room, making it an easy step process to enter a booking. The advance booking view allows for the advanced features of multiple room bookings: entering events that may have a pattern occurring for a duration, complex searches, room information and attributes, creating and saving booking templates, and having a report for conflicts in desired scheduling which allows the user to address.

The default view is the simple Booking. Choose the 'Hint Help' option under the Help menu to have dialogue boxes guide you through the booking process.



### 9.2 Simple Booking

#### Simple Booking

- Click on the "FASTbooking" icon in the FASTbook toolbar on the left side of the screen. A window should appear displaying options for making a booking.



- Create a new event in FASTbooking by entering a new 'Event Name,' or use the drop down menu to choose a pre-existing 'Event Name'. If you choose an event name from the drop down, all of the following fields should be populated automatically. If the user is not using the drop down window, the following fields will need to be populated manually: Status, Event Type, Client Name, Contact and Location.

- Use the mouse and/or the tab key to enter information in the following drop down menu fields and time masked fields in the "Time/Duration" section: Start Date, End Date, Start Time, End Time, Show Start, Show End. You may use either the drop down arrows and controls in the fields or type in the information in the given format.

Time/Duration	Day of Month	Day of Week	Weeks	Month
Start Date	5/12/2005			
End Date	5/12/2005			
Start Time	6:00 AM			
End Time	11:59 PM			
Show Start	6:00 AM			
Show End	11:59 PM			

Additional Days  
For 0 Day(s)

Number of Events to Generate  
 One Event  
 One per Day  
 One per Month

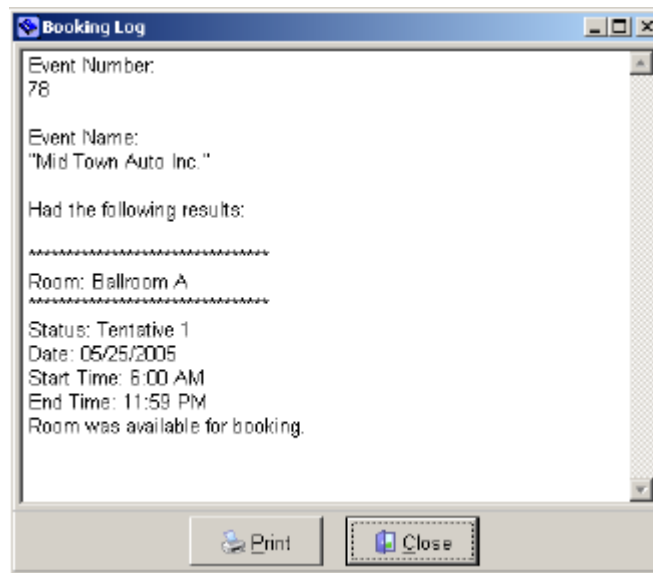
- Enter a name in the "Room Name" drop down field. There is no filtering on availability from the drop down list in simple booking. It will attempt to book the event based on the give information. If there is a conflict, it will be reported.

Room Name Ballroom A

Advanced >> New Booking Finish Booking Close

- Click on the "Finish booking" button.

A pop box will appear showing the status of the booking. If it is a short duration booking like a single day, your screen may barely register the image.



The "Booking Log" window will appear displaying the event number in the top left corner of the screen, the name of the event, and the room where the event was booked with the date(s) and time(s) of the event. The user should also be given the option of printing the booking from the "Booking Log" pop up window. This is an informational report for the booking agent for confirmation.



**NOTE:** If there is a scheduling conflict, this report will show the conflict by printing out the Event number, room, and date of the event already booked. This allows the user to make changes to accommodate both bookings.

- Click on the "New Booking" button to clear the data from the text fields and begin booking a new event.
- In the "Booking Log" pop up menu click the "Print" button (This should give the user a screen that displays options for previewing, printing, or saving the event, along with a display of what printer the document will print to).



- Click in the "Preview" radio button and then click "OK" (This should give the user a print preview of the booking confirmation).
- Click the "Ok" button to close the preview and then click on the "Print" radio button and print out the document. Make sure the document prints clearly and that the information is formatted correctly.
- Click the "File" radio button option and then specify the location for storage by clicking on the browse button in the report destination section. A pop up window should appear defaulting to the "Templates" folder. Name the booking and click the save button. The template is now saved and can be retrieved for use in the future.
- Close the print pop up window.
- Click on the "Booking Log" window close button and test the advanced booking section.

## 9.3 Advanced Booking

### Advanced Booking

- Click on the "**FASTbooking**" icon in the FASTbook toolbar on the left side of the screen. A window should appear displaying options for making a booking.
- Click on the "Advanced" booking button after entering the FASTbooking.

A window appears with additional FASTbooking features that allow the user to set up date patterns for events, book more than one room at a time, and allow for more access to room features to allow your facility's clients better choices for choosing which rooms to book. You can create a new event in FASTbooking or append to an existing event.

### Creating a new event

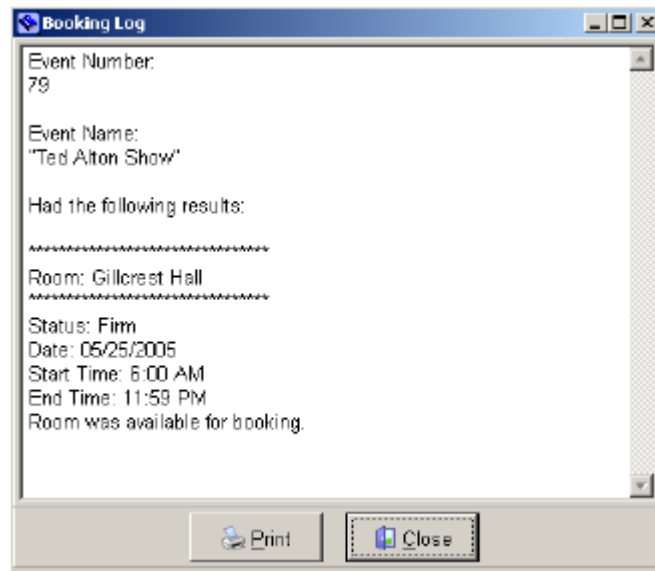
To create a new event, manually enter information in all of the applicable fields. You may navigate from field to field by pressing the 'Tab' key on the keyboard to move to the next logical field or use your mouse;

- Enter an Event Name, Status, Event Type, Client Name, Contact, and if needed, Location.
- Specify the duration of the Event in the "Start Date" and "End Date" fields in the "Time/Duration" section (NOTE: You must specify a date range in the "Time/Duration" in order for the date patterns to function correctly).
- Click on the "Day of Month", "Day of Week", "Weeks" and "Months" tabs, dates to include and exclude tabs and then click on the appropriate check boxes to book rooms of your event between the "Start Date" and "End Date" entered.



**NOTE:** If you need to do a more restrictive search for a room that needs to support a specific room style and capacity, you may enter in those values prior to clicking on the "Search" button.

- Click on the search button; it will automatically list all the rooms that meet the entered requirements.
- Select a room from the Room sub grid by clicking on it. A check box should appear in the leftmost column.
- Click the "Finish Booking" button.



If another event with a different status is booked earlier, a popup window will appear with information about the conflict: date, event name, event number, status, and time.

If you wish to continue booking the event, click the yes button to complete the booking.

A "Booking Log" popup window should appear confirming the booking and displaying the event number in the top left corner of the screen, the name of the event, and the room where the event was booked with the date(s) and time(s) of the event. The user should also be given the option of printing the booking from the "Booking Log" pop up window.

Click on the "Close" button in the "Booking Log" pop up window.

You may now click on the "New Booking" button to add another Event.

Create an entry using each of the date pattern options, "Day of Month", "Day of Week", "Weeks", "Months" and with dates to include and exclude.

Check the calendar after each pattern has been entered to make sure that the information is appearing in the appropriate dates. Save the entries.

In the "Booking Log" pop up menu, click the "Print" button (This should give the user a screen that displays options for previewing, printing or saving the event, along with a display of what printer the document will print to).

Make sure the "Preview" radio button is selected and then click "OK" (This should give the user

- a print preview of the booking log screen).
- Click the "Ok" button to close the preview and then click on the "Print" radio button and print out the document. Make sure the document prints clearly and that the information is formatted correctly.
  - Click the "File" radio button option and then specify the location for storage by clicking on the browse button in the report destination section. A pop up window should appear defaulting to the "Templates" folder. Name the booking and click the save button. The template is now saved and can be retrieved for use in the future.

Close the print pop up window.

Save one of your date pattern bookings using the "Save Template" button. A pop up window should appear asking you what you want to name the template being saved. Give it a name and click okay.

Click on the "Open Template" button at the bottom of the screen.

Re-open the template that you just saved. The event should appear in the FASTbooking screen. Make sure all date (Including the rooms) was saved accurately.

Close the FASTbooking section.

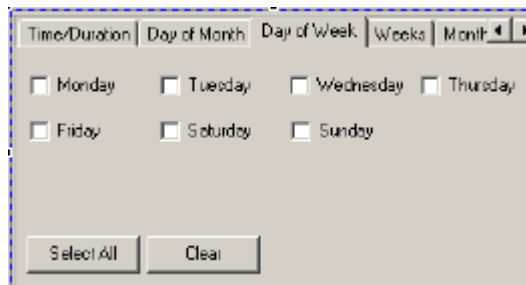
## 9.4 Setting up the Time/Duration section for an event

### Setting up the Time/Duration section for an event

When booking a multiple day event that has unbooked days in between non-consecutive booking days, we can use the Time/Duration tabs (Day of Month, Day of Week, Weeks and Months) and dates to include and exclude to indicate a desired pattern.

Time/Duration	Day of Month	Day of Week	Weeks	Month
Start Date	5/12/2005			
End Date	5/12/2005			
Start Time	6:00 AM			
End Time	11:59 PM			
Show Start	6:00 AM			
Show End	11:59 PM			
Additional Days				
For		0		
Day(s)		Day(s)		
Number of Events to Generate				
<input checked="" type="radio"/> One Event				
<input type="radio"/> One per Day				
<input type="radio"/> One per Month				

For example, if booking a class starting in January and ending in February that occurs only on Tuesday and Thursday, Time/Duration options would be setup like so:



Note that the dates and times are set on the 'Time/Duration' tab. Then on the 'Day of Week' tab, Tuesday and Thursday are selected. This will book all Tuesdays and Thursdays from January 1, 2005 until February 28, 2005.

## 9.5 Time/Duration tab

### Time/Duration tab

**Start Date-** The first date of an event or the date of the first sub event.

**End Date-** The last date of an event or the date of the last sub event.

**Start Time-** The time of the first sub event booked.

**End Time-** The end time of the last sub event booked.

**Show Start-** Informational time of when an activity will start within the booked time.

**Show End-** Informational time of when an activity will end within the booked time.

**Additional Days-** The number of days beyond Start Date to End Date, indicating the range of days effected by the pattern being booked.

**Number of Events to Generate-** (This indicates how the event and event number(s) will be generated and how sub events will be distributed across events. This is important to note since it will determine number of invoices is created.

**One Event-** This will book all sub events under a single event number and one invoice for the entire event.

**One per Day-** This will set one event per day and one invoice per day.

**One per Month-** This will set one event number per month and one invoice per month.

### 9.5.1 Other Fields to search by

#### Other Fields to search by...

When looking for a room that will need a specific room style or a room to hold a specific number for attendance, or even both a room style and an associated number for attendance, the information may be optionally entered to limit a search for room availability.



For example, if looking for a room that can be setup with a classroom style for 30 students, fill in the fields like so. When you press the 'Search' button, only available rooms that were noted in setup to be able to hold a classroom configuration for a capacity of 30 or more people will show up in the 'Room Name' list.

If only a room style is entered, than a capacity of zero is assumed. If only the attendance is entered, then the rooms will be filtered out by 'Maximum Allowable Occupancy' for each room.

## 9.6 Creating a New Event

To create a new event, enter information in all of the applicable fields. You may navigate from field to field by pressing the 'Tab' key on the keyboard to move to the next logical field, or you can use your mouse.

- Enter an Event Name, Status, Event Type, Client Name, Contact, and if needed, Location.
- Specify the duration of the Event in the "Start Date" and "End Date" fields in the "Time/Duration" section (NOTE: You must specify a date range in the "Time/Duration" in order for the date patterns to function correctly).
- Click on the "Day of Month", "Day of Week", "Weeks" and "Months" tabs, choose dates to include and exclude, and then click on the appropriate check boxes to book rooms of your event between the "Start Date" and "End Date" entered.



**NOTE:** If you need to do a more restrictive search for a room that needs to support a specific room style and capacity, you may enter in those values prior to clicking on the "Search" button.

- Click on the search button and it will automatically list all the rooms that meet the entered requirements.
- Select a room from the Room sub grid by clicking on it. A check box should appear in the leftmost column.
- Click the "Finish Booking" button.

If another event with a different status is booked earlier, a popup window will appear with information about the conflict: date, event name, event number, status and time.

If you wish to continue booking the event, click the yes button to complete the booking.

A "Booking Log" pop up window should appear confirming the booking and displaying the event number in the top left corner of the screen, the name of the event, and the room where the event was booked with the date(s) and time(s) of the event. The user should also be given the

option of printing the booking from the "Booking Log" pop up window.

Click on the "Close" button in the "Booking Log" pop up window.

You may now click on the "New Booking" button to add another Event.

Create an entry using each of the date pattern options, "Day of Month", "Day of Week", "Weeks", and "Months". Check the calendar after each pattern has been entered to make sure that the information is appearing in the appropriate dates. Save the entries.

In the "Booking Log" pop up menu click, the "Print" button (This should give the user a screen that displays options for previewing, printing or saving the event, along with a display of what printer the document will print to).

Make sure the "Preview" radio button is selected and then click "OK" (This should give the user a print preview of the booking log screen).

- Click the "Ok" button to close the preview and then click on the "Print" radio button and print out the document. Make sure the document prints clearly and that the information is formatted correctly.
- Click the "File" radio button option and then specify the location for storage by clicking on the browse button in the report destination section. A pop up window should appear defaulting to the "Templates" folder. Name the booking and click the save button. The template is now saved and can be retrieved for use in the future.

Close the print pop up window.

Save one of your date pattern bookings using the "Save Template" button. A pop up window should appear asking you what you want to name the template being saved. Give it a name and click okay.

Click on the "Open Template" button at the bottom of the screen.

Reopen the template that you just saved. The event should appear in the FASTbooking screen. Make sure all dates (including the rooms) were saved accurately.

Close the FASTbooking section.

## 9.7 Weeks of Month Tab

Day of Month | Day of Week | Weeks | Months | Never Includ ◀ ▶

First 7 Days     Fourth 7 Days  
 Second 7 Days     Fifth 7 Days  
 Third 7 Days     Last 7 Days

Select All    Clear

## 9.8 Dates to Include & Exclude

Day of Week | Weeks | Months | Never Include | Always Includ ◀ ▶

◀ **March, 2004** ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	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	5	6	7	8	9	10

Today: 5/12/2005

Remove Date

03/15/2004  
03/16/2004  
03/17/2004  
03/18/2004  
03/19/2004

Weeks | Months | Never Include | Always Include ◀ ▶

◀ **July, 2005** ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	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	5	6

Today: 5/12/2005

Remove Date

02/21/2005  
05/30/2005  
07/04/2005

**FASTbook 5.5**

# **Chapter**



**10**

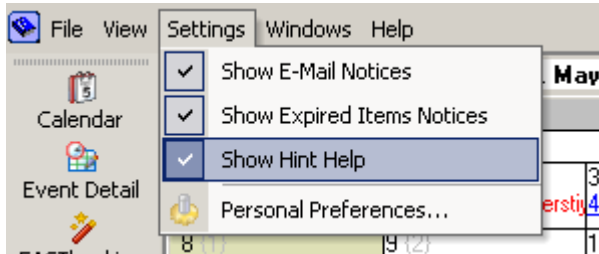
**Timelines**

## 10 Timelines

### 10.1 Overview



### How to use the Timelines



**NOTE:** You can view any one of the time lines by highlighting a day cell in the Calendar and then right-clicking with your mouse. The menu will appear and display an option for each one of the time lines. Click on the one you want to view and it will take you directly to it.

- To get more detailed information about your center's room status for a month, open the monthly Room Timeline by pressing on its button.
- To get more detailed information about your center's event bookings for a month, open the month you want to view in the calendar and then open the monthly Event Timeline by pressing on its button.
- To get more detailed information about your center's resource bookings (like Equipment and Meals) for a day, make that day your current one and then open the Resource Timelines by pressing on the button.
- To exit, choose Close at the bottom of the pop up window.
- To Exit **FASTbook** go to file on the menubar, choose Exit from the menu that drops down.
- Choose Minimize from the title bar to minimize **FASTbook** for later use.

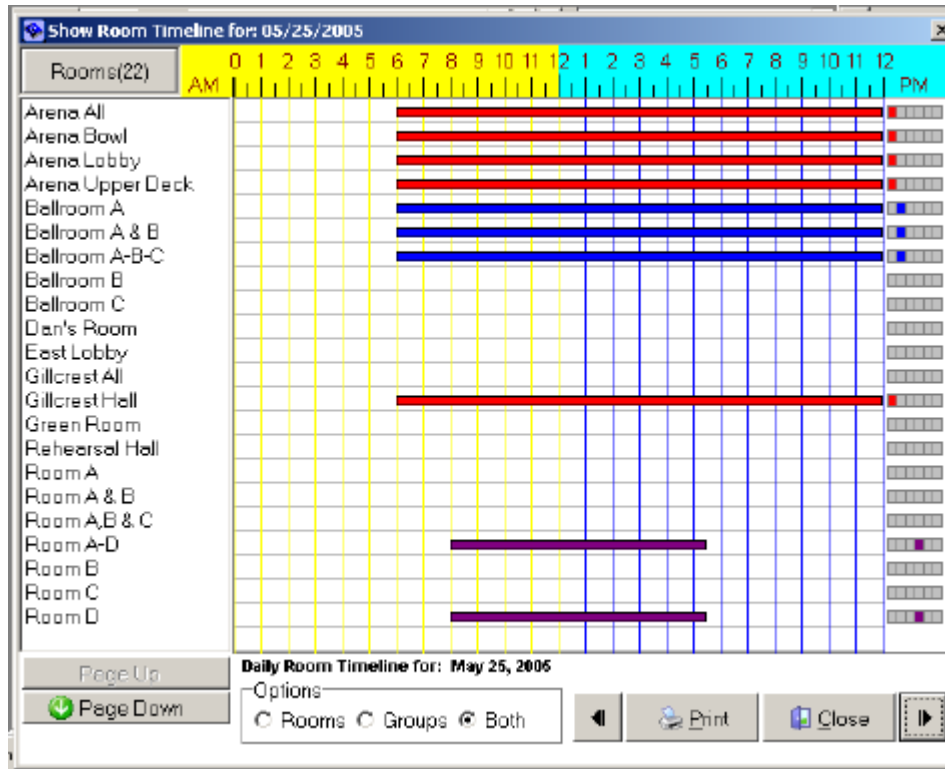
### 10.2 Daily Timelines

#### Daily Time Lines

The Daily Timeline is a graphical display of your center's bookings for one day. 24 hours are displayed at the top of the window next to the room count area. All the facilities' rooms and room groups are listed in alphabetical order on the left side.

- To get more detailed information about your center's status for a given day, click on the day in the calendar that you would like to view and then click the Timelines button on the side

toolbar. To view information about a day's events, click on the daily timeline button.



Use the Page Up and Page Down buttons to scroll within the room name table if the facility has more rooms than can be displayed in one screen.

The timelines are displayed in a grid that shows every hour in the day. The morning hours (AM) are yellow, the evening hours (PM) are light blue.

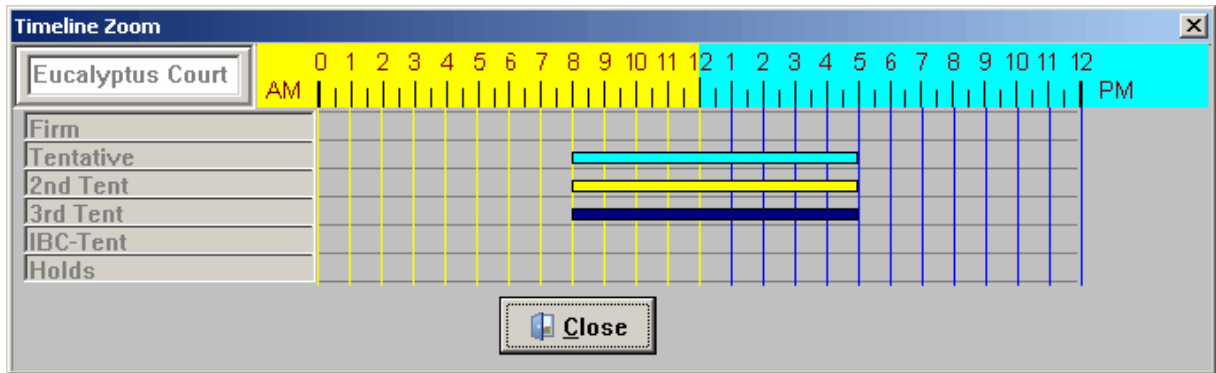
Timelines can appear in 6 different colors, if your center uses 6 statuses. The colors are user defined and you can look up their meaning in the setup module under Center Profile in the Status tab.

If you allowed time for setup and tear down of a room, you will see those times displayed at the beginning and end of each timeline as a shaded area.



Bubble Help appears when the mouse pointer passes over a timeline. It contains the Event Name, and its Start and End Time.

- Double click on the room name you want to examine closer. A Timeline zoom screen pops up showing you all timelines for the room you double clicked on.



The room name is displayed in the left top part of the screen followed by the 24hour timeline. All statuses are listed in the table along the left side, and the appropriate timelines are shown in the grid. This zoom screen is necessary to display all overlapping timelines.

- Click on the Close button to return to the daily timeline for rooms.

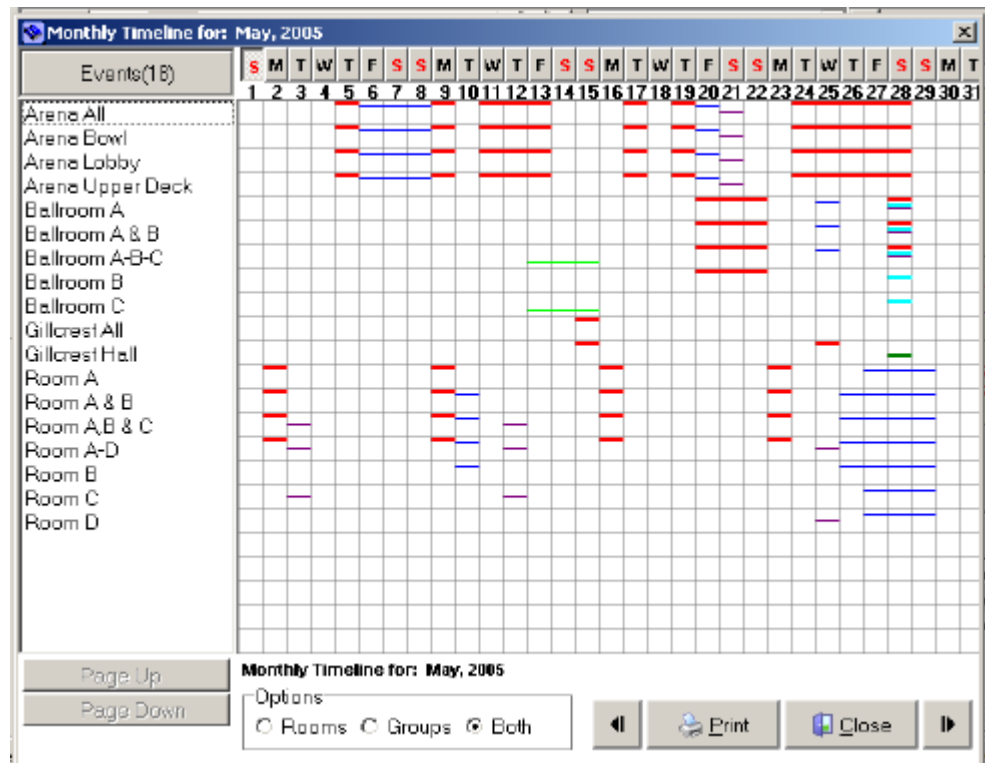
To exit choose Close at the bottom of the pop up window.

- To Exit **FASTbook**, go to file on the menubar, choose Exit from the menu that drops down.
- Choose Minimize from the title bar to minimize **FASTbook** for later use.

### 10.3 Monthly Timelines for Rooms

#### Monthly Timeline for Rooms

The Monthly Time line for Rooms is a graphical display of your center's bookings for one entire month.



The days of the month are displayed at the top next to the room count area. All rooms for the facility are listed in alphabetical order on the left side.

Use the Page Up and Page Down buttons to scroll within the room name table if the facility has more rooms than can be displayed in one screen.

The timelines are displayed in a grid that shows every day in the month. Saturday and Sunday are always displayed with a red color, while the weekdays are black.

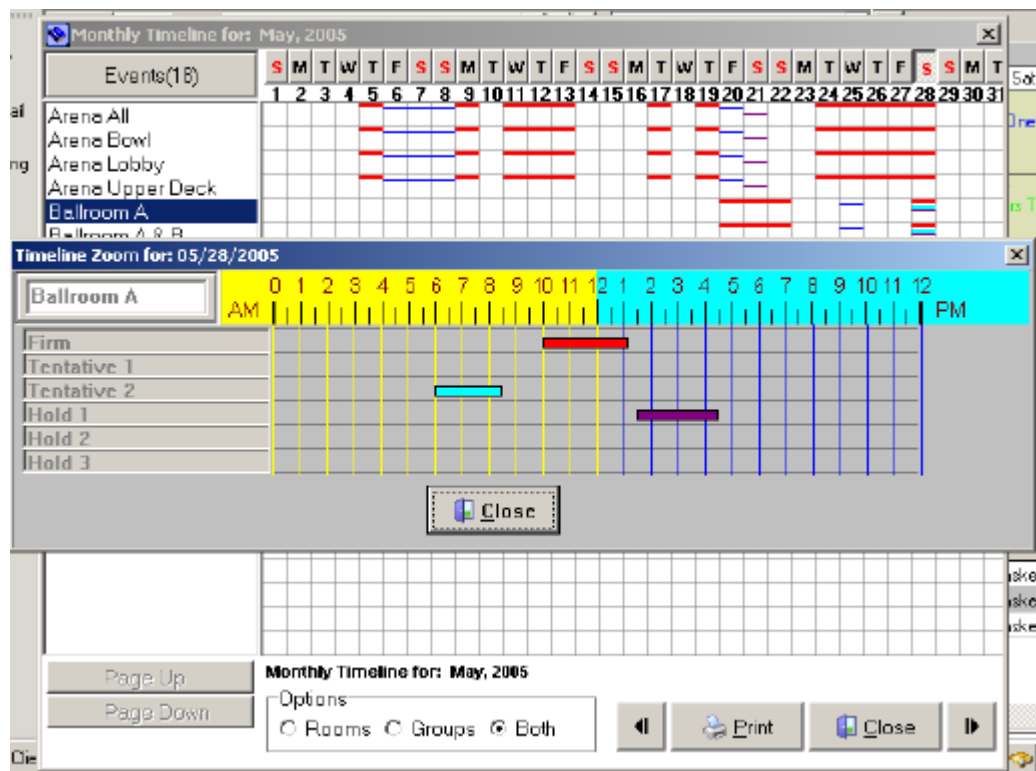
Just like in the daily timeline screen, the monthly timelines can appear in 6 different colors, if your center uses all 6 statuses. The colors are user defined and you can look up their meaning in the setup module under Center Profile in the Status tab.

Because all statuses are always visible (they don't overlap) you get an instant overview of your center's availability.

If you wish to see a complete overview for specific rooms and days you need to:

- Click on the day you wish to examine closer. I chose Saturday May 28, 2005
- Double click on the room name you want to inspect.





A Timeline zoom screen pops up showing you all timelines for the room on the day you clicked on.

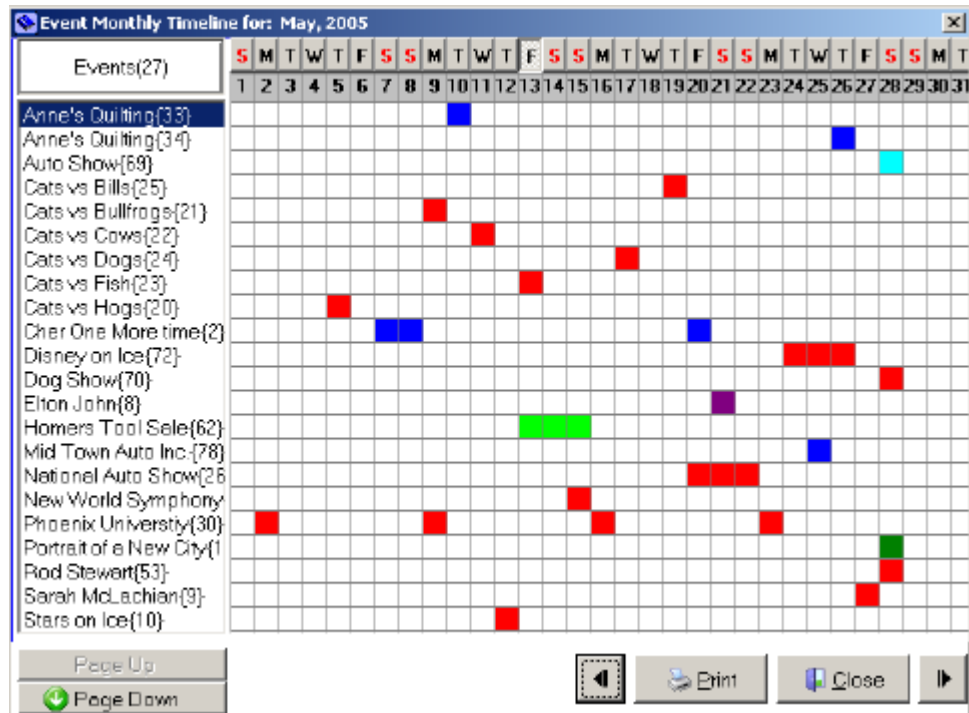
The room name is displayed in the left top part of the screen followed by the 24 hour timeline. All statuses are listed in the table along the left side, and the appropriate timelines are shown in the grid. Since the monthly timeline can become quite overwhelming, the zoom gives you a much more calm overview.

- Click on the Close button to return to the monthly timeline for rooms.

## 10.4 Monthly Event Timeline

### Monthly Event Timeline

The Event Monthly Timeline is a graphical display of your center's bookings for one entire month. Displayed are all events happening throughout a month. You can easily observe the duration of an event and its status.



The days of the month are displayed at the top, next to the event count area. All event bookings for the month active in the calendar are listed in alphabetical order on the left side.

Use the Page Up and Page Down buttons to scroll within the room name table if the facility has more rooms than can be displayed in one screen.

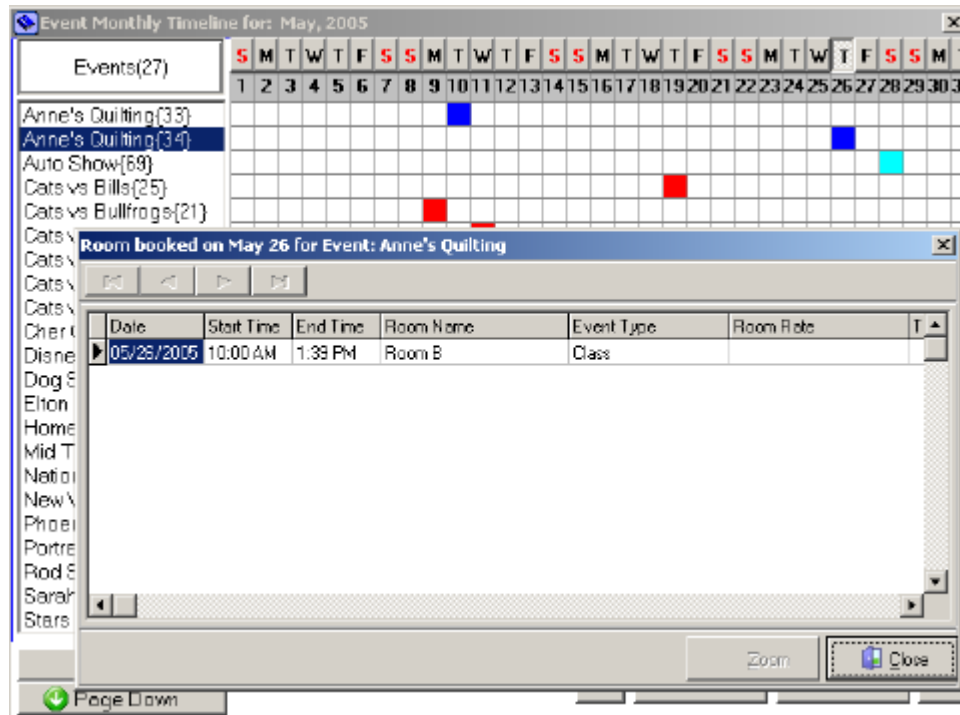
The timelines are displayed in a grid that shows every day in the month. Saturday and Sunday are always displayed with a red color, the weekdays are black.

The timelines can appear in 6 different colors, if your center uses all 6 statuses. The colors are user defined and you can look up their meaning in the setup module under Center Profile in the Status tab.

Because each event status is visible, you get an instant overview of your center's availability.

If you wish to see a complete overview for a specific event, you need to:

- Click once on the number for the day you wish to examine closer.
- Click twice on the event name you want to inspect.



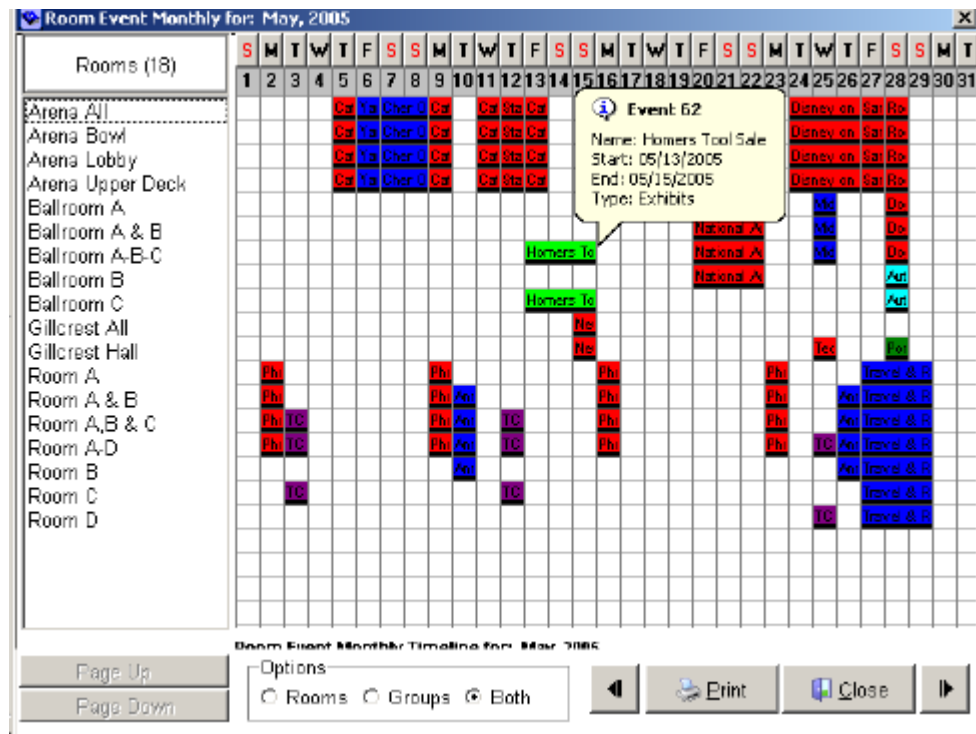
A Timeline zoom screen pops up showing you all different rooms for the event you selected.

- Click on the Close button to return to the monthly timeline for rooms.

## 10.5 Room Event Monthly

### Room Event Monthly

The Room Event Monthly Timeline is a graphical display of your center's bookings for one entire month. Displayed are all events happening throughout a month. You can easily observe the duration of an event and its status.



The days of the month are displayed at the top, next to the event count area. All event bookings for the month active in the calendar are listed in alphabetical order on the left side.

Use the Page Up and Page Down buttons to scroll within the room name table if the facility has more rooms than can be displayed in one screen.

The timelines are displayed in a grid that shows every day in the month. Saturday and Sunday are always displayed with a red color, the weekdays are black.

The timelines can appear in 6 different colors, if your center uses all 6 statuses. The colors are user defined and you can look up their meaning in the setup module under Center Profile in the Status tab.

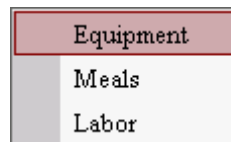
Because each event status is visible, you get an instant overview of your center's availability. If you wish to see a complete overview for a specific event you need to mouse over one of the events.

## 10.6 Daily Timeline for Resources

### Daily Timelines for Resources

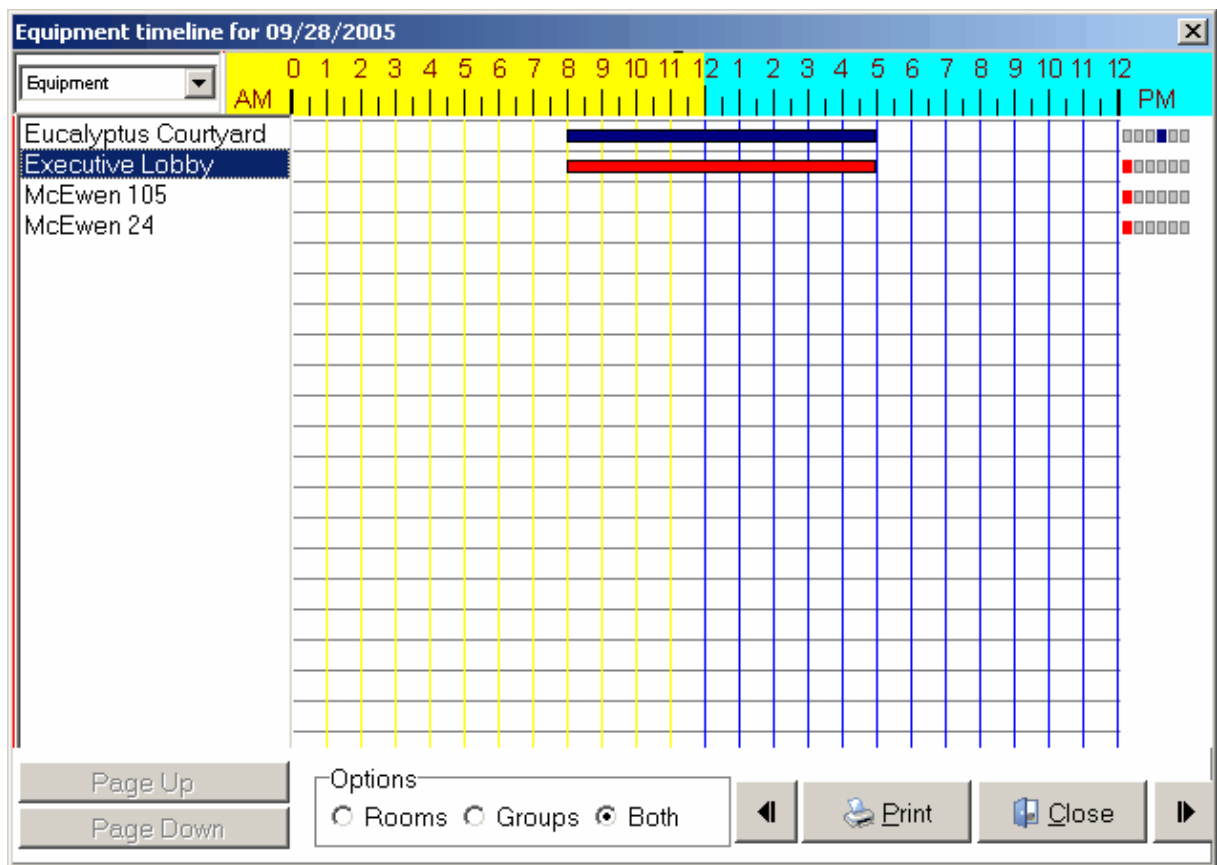
The Timelines are a graphical display of your center's resource bookings for one day.

- Click on the day cell you want to lookup a resource for.
- Click on the Resource button in the Time Lines pop up window .
- Resources are Equipment, Meals, and Labor. Each one has their own Timeline.



#### **Working With The Equipment Timeline**

If you want to look up all equipment booked for one day, highlight the day you want to look at on the Calendar, click the Time Lines Icon in the right tool bar and then click on the Resource Timeline. From there click on the Equipment button in the pop up window. The equipment timeline will pop up.



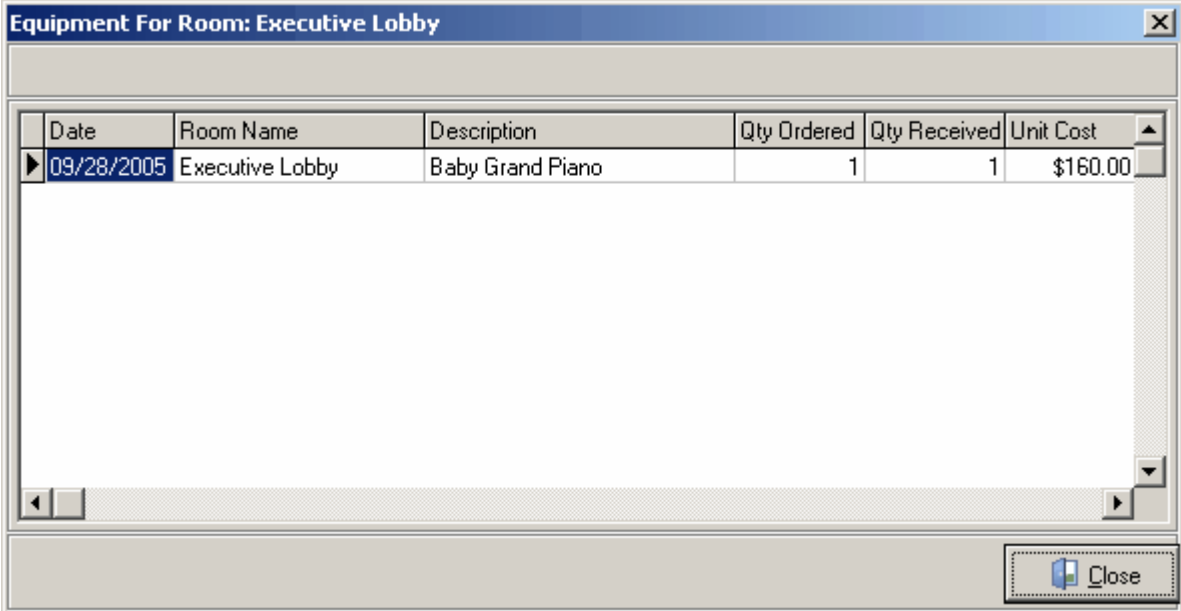
If you want to look up all equipment booked for one day, highlight that day and right mouse click on the calendar and choose the Resource timelines option from the menu. A resource window will appear displaying your three resource options. Select the equipment button. You can also get to the equipment timeline by clicking on the Time Lines button on the right toolbar, then selecting the Resource timelines and the equipment button.

The room names are listed in a table on the left side. If there are more rooms than lines in the table, use the Page Up and Page Down buttons to scroll.

The timelines in the grid show the 24 hours of the day you selected. If you move with your mouse directly over a timeline, the bubble help will tell you what event is scheduled in the room.

To see a single piece of equipment listed, **FASTbook** has an equipment zoom screen.

- Double click on an event name to look up more detailed information about the equipment



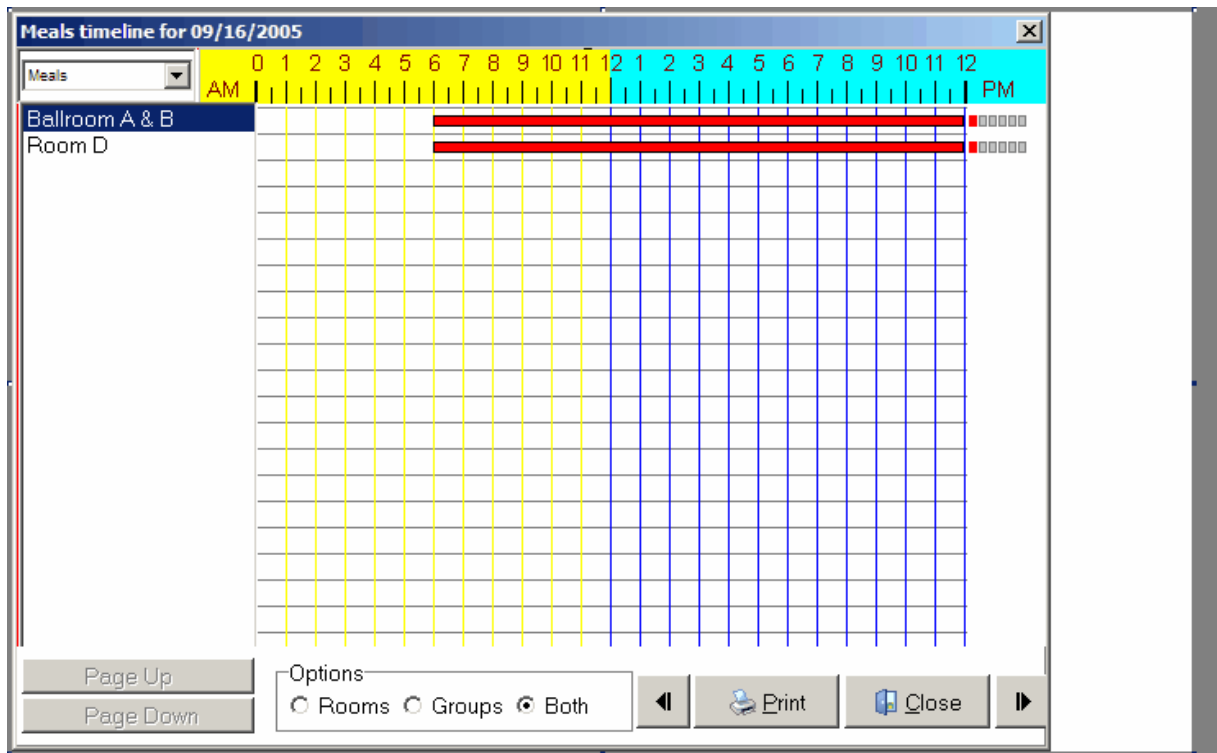
Date	Room Name	Description	Qty Ordered	Qty Received	Unit Cost
09/28/2005	Executive Lobby	Baby Grand Piano	1	1	\$160.00

A screen will pop up showing you the Description of the equipment, the Date it is in use, the Room Name, the Quantity ordered and received, the Unit Cost, and the Total Cost.

- To close the Equipment pop up, click on the Close button.
- To close the Equipment Timeline, click on the Close button.

#### Working With The Meals Timeline

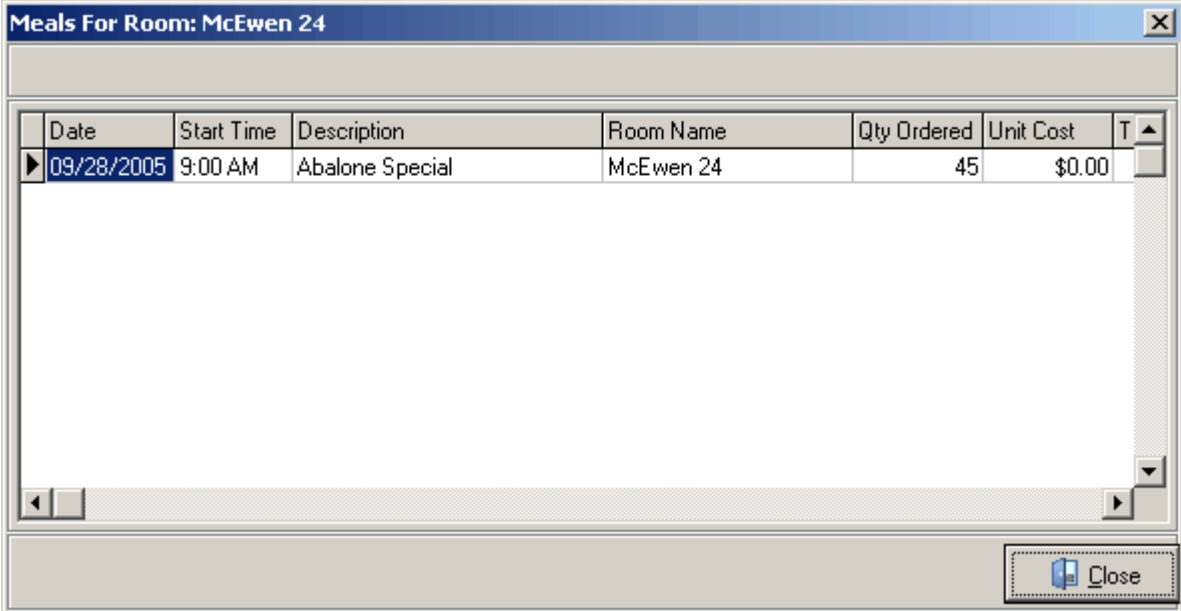
- If you want to look up all meals booked for one day, highlight that day and right mouse click on the calendar and choose the Resource timelines option from the menu. A resource window will appear displaying your three resource options. Select the meals button. You can also get to the meals timeline by clicking on the Time Lines button on the right toolbar, select the Resource timelines and the meals button.



The room names are listed in a table on the left side. If there are more rooms than lines in the table, use the Page Up and Page Down buttons to scroll. The timelines in the grid show the 24 hours of the day you selected at the top.

- If you move with your mouse directly over a timeline, a HINT will tell you the event that is scheduled in the room.
- Double click on a meal to view it in more detail. A screen will pop up showing you the Description of the meal, the date, the Room Name, the Quantity, the Cost for one meal, and the Total Cost.
- To close the Meal pop up, click on the Close button.
- To close the Meal Timeline, click on the Close button.





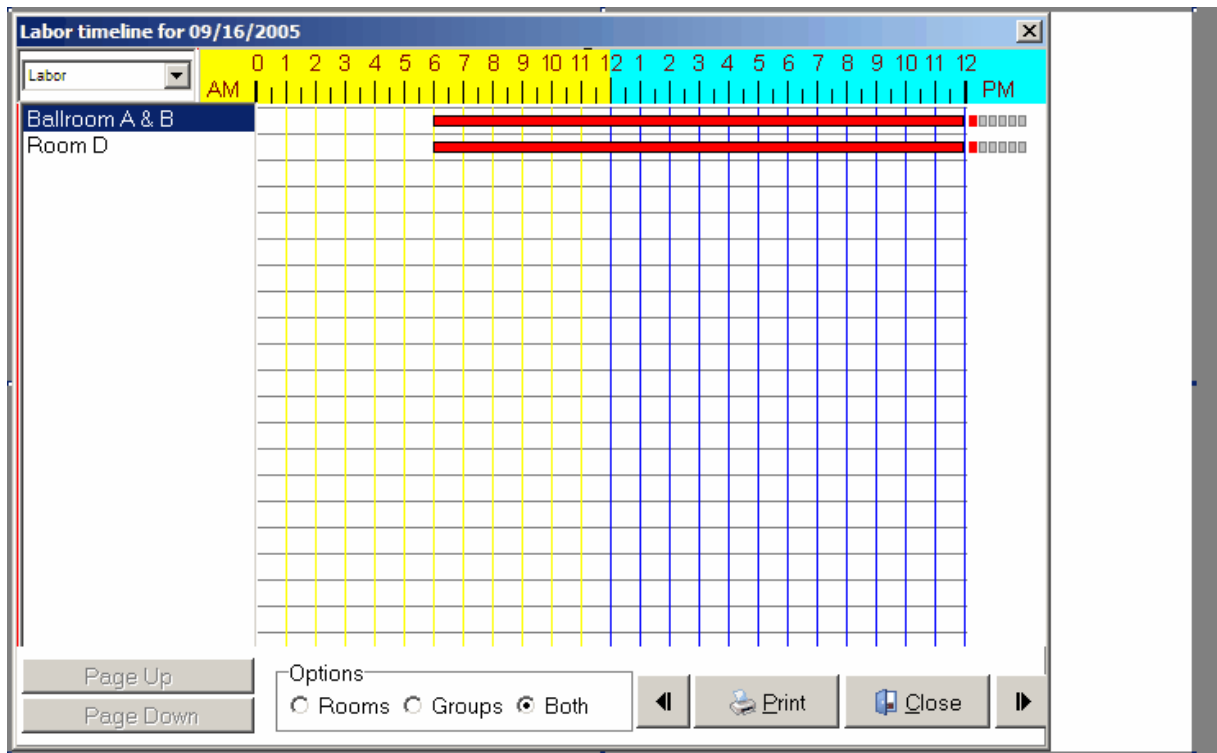
Date	Start Time	Description	Room Name	Qty Ordered	Unit Cost	T
09/28/2005	9:00 AM	Abalone Special	McEwen 24	45	\$0.00	

## 10.7 Working With The Labor Timeline

### Working With The Labor Timeline

- If you want to look up all labor booked for one day, highlight that day and right mouse-click on the calendar and choose the Resource time lines option from the menu. A resource window will appear displaying your three resource options. Select the labor button. You can also get to the labortime line by clicking on the Time Lines button on the right toolbar, select the Resource timelines and the labor button.

The labor timeline will pop up.



The room names are listed in a table on the left side.

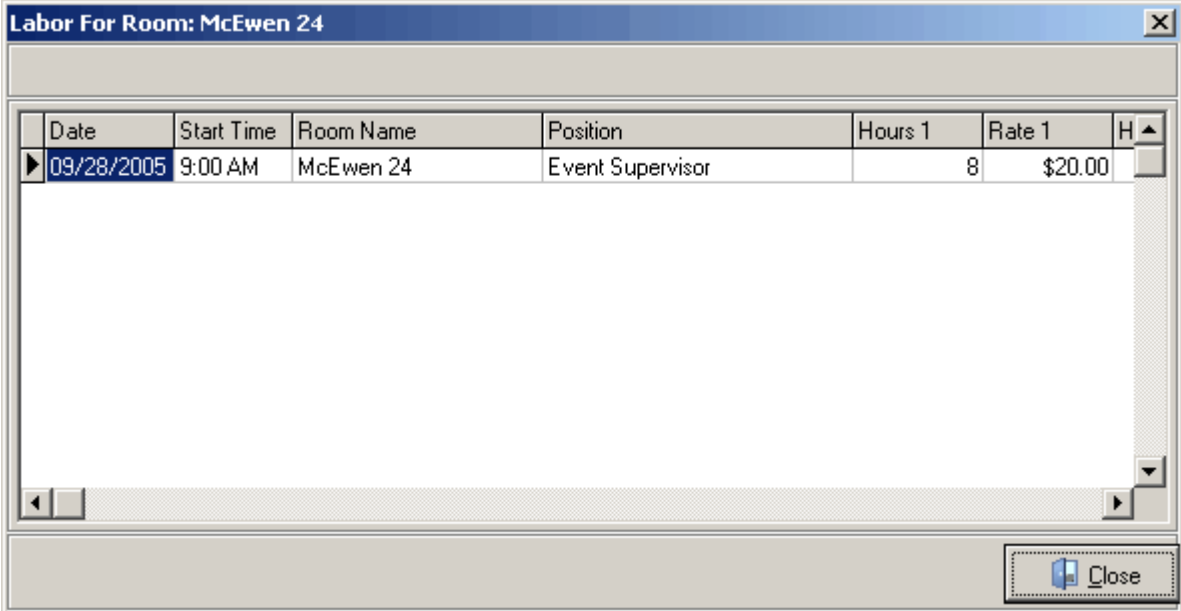
If there are more rooms than lines in the table, use the Page Up and Page Down buttons to scroll.

The timelines at the top show the 24 hours in the day.

- If you move with your mouse directly over a timeline, the bubble help will tell you what event is scheduled in the room.

To see all labor listed, **FASTbook** has a labor zoom screen.

- Double click on an event name to look up more detailed information about the labor. A screen will pop up showing you the Description of the labor, the Date, the Room Name, the Quantity, the Unit Cost, and the Total Cost.



The screenshot shows a window titled "Labor For Room: McEwen 24". Inside the window is a table with the following data:

Date	Start Time	Room Name	Position	Hours 1	Rate 1	H ▲
▶ 09/28/2005	9:00 AM	McEwen 24	Event Supervisor	8	\$20.00	

At the bottom right of the window is a "Close" button with a blue icon.

- To close the Labor pop up click on the Close button.
- To close the Labor Timeline click on the Close button.

# FASTbook 5.5

# Chapter



11

Expired Items

## 11 Expired Items

### 11.1 Overview



### Expired Items

- The Expired Items window consist of three components: Events, Payments, and Ticklers.
- The Events Tab - shows events whose statuses are pending approval and are about to expire.

The screenshot shows a window titled 'Expiring Items' with three tabs: 'Events (23)', 'Payments', and 'Ticklers (136)'. The 'Events' tab is active, displaying a table with the following data:

Event #	Event Name	Status	Expire Date
2	Cher One More time	Tentative 1	04/12/2005
18	The Neville Brothers	Tentative 1	04/12/2005
7	Yanni	Tentative 1	04/12/2005
37	Anne's Quilting	Tentative 1	04/14/2005
36	Anne's Quilting	Tentative 1	04/14/2005
35	Anne's Quilting	Tentative 1	04/14/2005
34	Anne's Quilting	Tentative 1	04/14/2005
33	Anne's Quilting	Tentative 1	04/14/2005
32	Anne's Quilting	Tentative 1	04/14/2005
66	Chamber of Commerce Lunch	Tentative 1	04/14/2005
51	Travel & RV show	Tentative 1	04/14/2005
50	Travel & RV show	Tentative 1	04/14/2005
49	Travel & RV show	Tentative 1	04/14/2005

At the bottom of the window, there are four buttons: 'Open in Browser', 'Copy To Clipboard', 'Print', and 'Close'.

- The Payments Tab - shows events and due dates of payments that are about to expire.

Event #	Client Name	Due Date	Amount	Event Name
27	ABCS Inc	04/27/2005	4,195.25	All Brand Computer Sale
26	Auto Shows Inc	04/29/2005	9,700.00	National Auto Show
30	Phoenix Univ. Inc.	05/02/2005	1,000.00	Phoenix Universtiy
28	Harry RV Motors Inc	05/02/2005	2,350.00	Travel & RV show

Buttons: Open in Browser, Copy To Clipboard, Print, Close

- The Ticklers Tab - shows events that have been assigned to specific users and functions.

Event #	Action	Due Date	Assigned To
41	Send Contract	02/05/2005	ALICE
1	Send Contract	02/08/2005	ALICE
3	Send Contract	02/11/2005	ALICE
2	Recieve Contract Back	02/12/2005	ALICE
5	Send Contract	02/14/2005	ALICE
28	Send Contract	02/14/2005	ALICE
27	Recieve Contract Back	02/15/2005	ALICE
29	Recieve Contract Back	02/18/2005	ALICE
4	Send Contract	02/18/2005	ALICE
41	Recieve Contract Back	02/20/2005	ALICE
1	Recieve Contract Back	02/23/2005	ALICE
3	Recieve Contract Back	02/26/2005	ALICE

Buttons: Open in Browser, Copy To Clipboard, Print, Close

**FASTbook 5.5**

**Chapter**

**12**

**FASTbook Messaging**

## 12 FASTbook Messaging

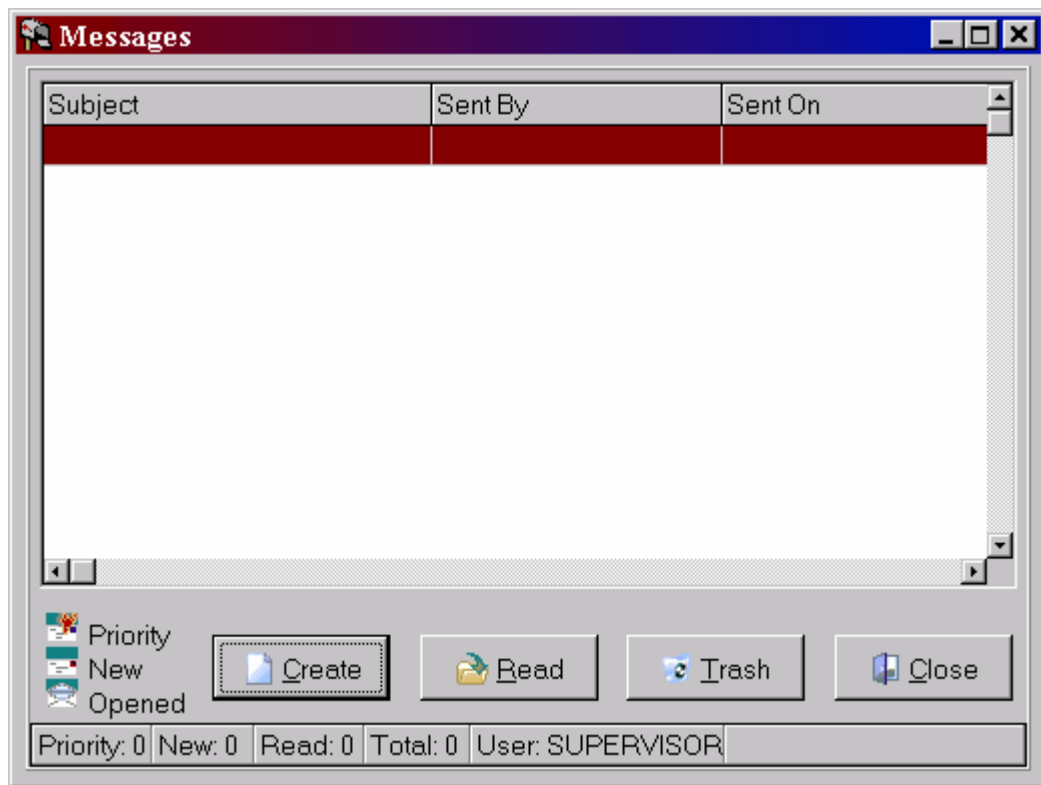
### 12.1 Overview



#### **Sending Messages (FASTbook Internal Messages System)**

The Fastbook Internal Messages System allows the users of Fastbook to send internal messages to each other or to a group.

- Click on the Messages Icon on the left side of the toolbar. The Messages window will appear.

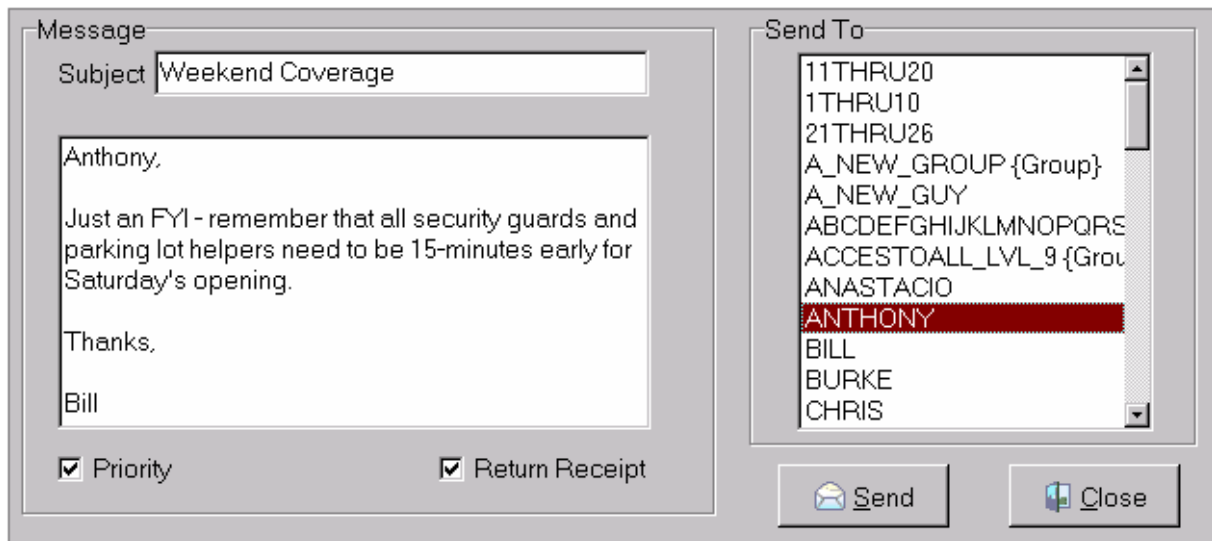


#### **Creating a new message:**

- Click "Create" and the Send Message window appears.
- Type in Subject and press <TAB>.
- Type in the message you want to send and press <TAB>.
- Click on the person or group you want to send the message to and press <TAB>.
- Select Priority if you want the message sent ASAP.
- Select Return Receipt if you want to verify that message was received.

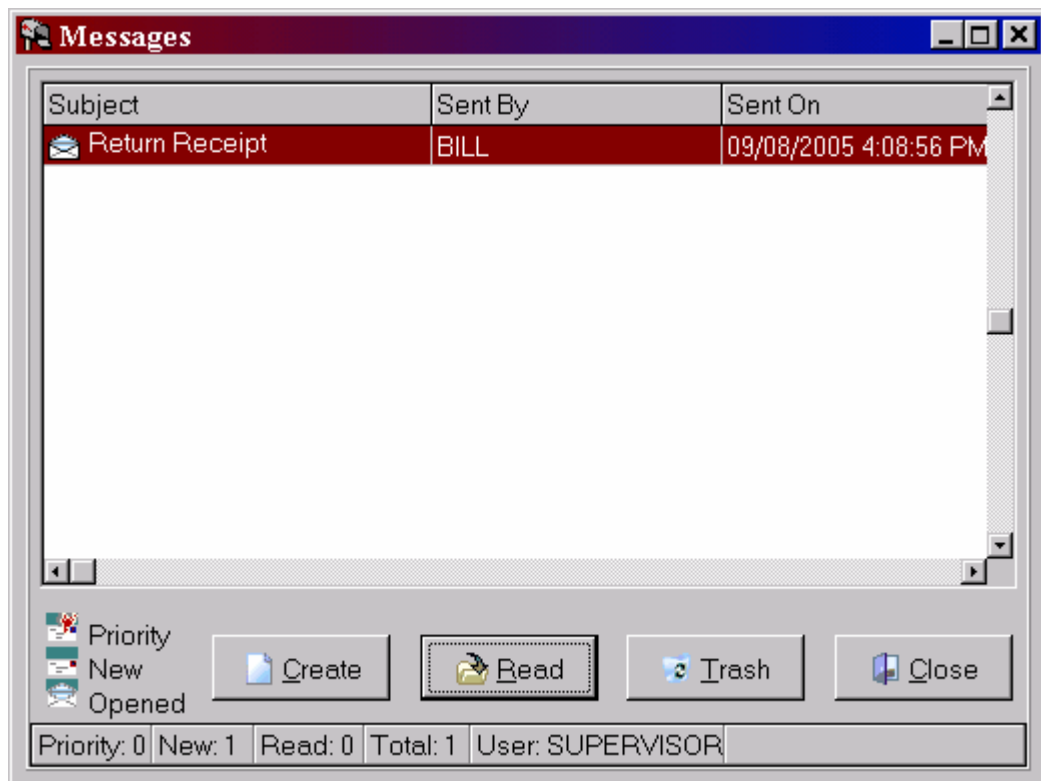


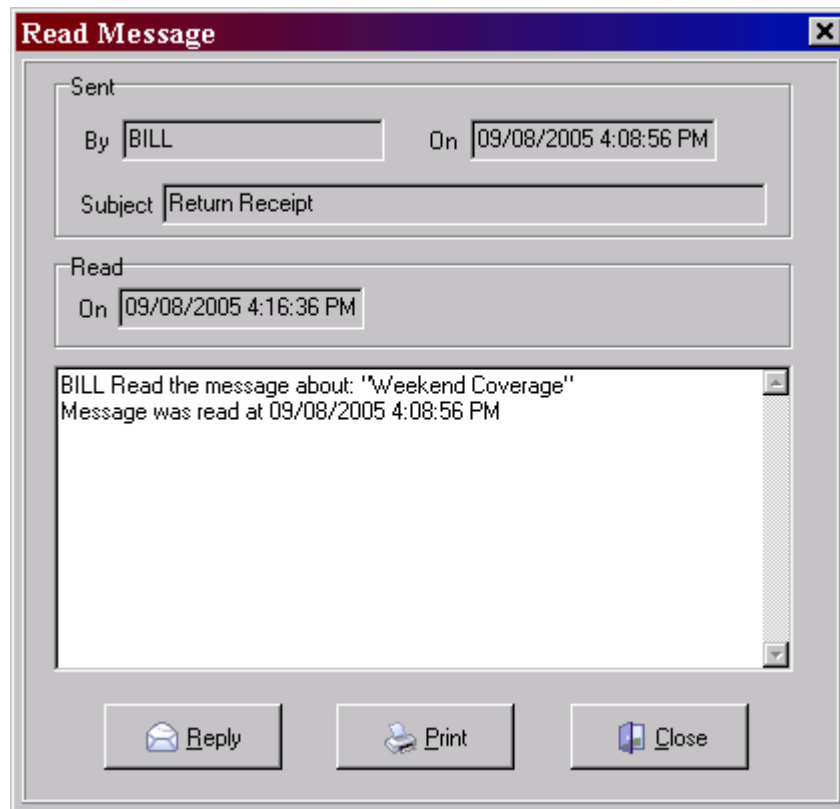
- Click on Send and then Close.



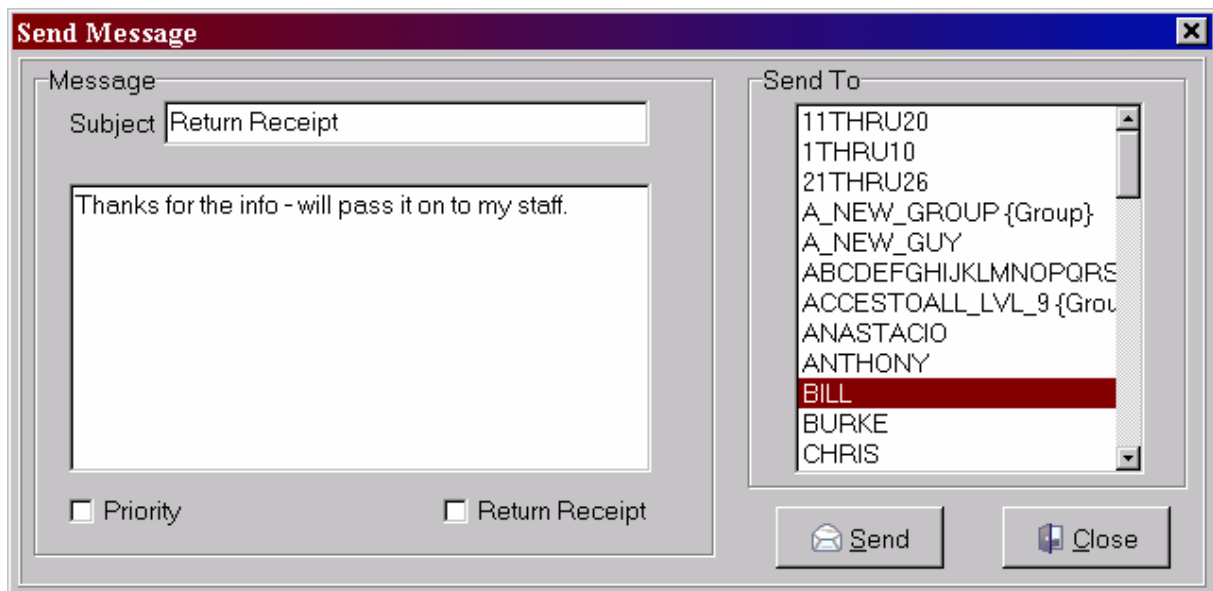
#### Reading a new message:

- Click "Read" and the Read Message window appears.



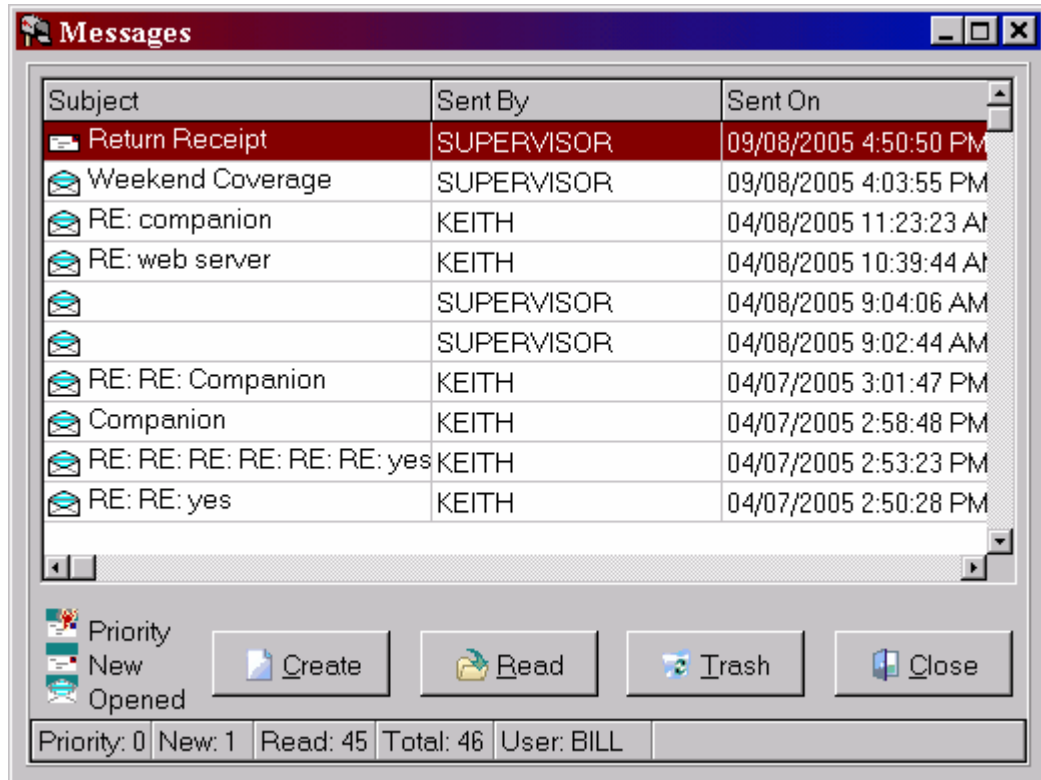


- At the "Read Message" window you can either Reply to the sender or Print message.
- To reply - click on "Reply"
- Type in the message you want to send and press <TAB>.
- Click on Send and then Close



### Deleting messages:

- From the "Messages" window highlight which message you want to delete.
- Click on "Trash".
- Click on "Close".



**FASTbook 5.5**

**Chapter**

**13**

Email

## 13 Email

### 13.1 Overview



#### **Sending E-mail (FASTbook External E-Mail System)**

- Click on the E-mail button from the toolbar on the left side of the screen. The E-mail window will appear.

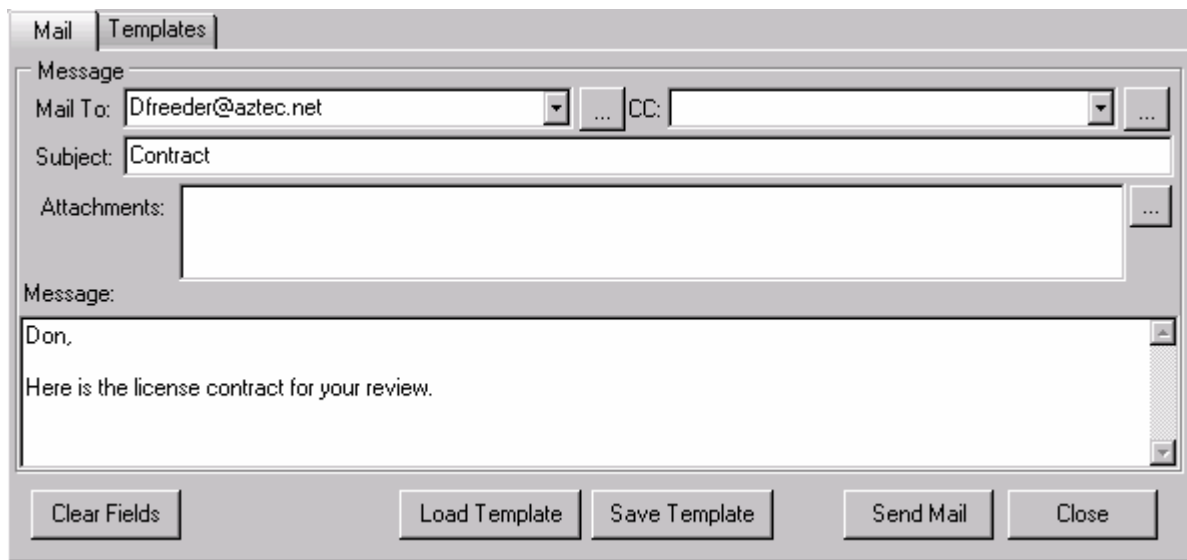
A screenshot of a software window titled "Mail" with a "Templates" tab. The window contains a "Message" section with fields for "Mail To:" (with a dropdown arrow and an ellipsis button), "CC:" (with a dropdown arrow and an ellipsis button), "Subject:", and "Attachments:" (with an ellipsis button). Below these is a large text area for the "Message:". At the bottom of the window are five buttons: "Clear Fields", "Load Template", "Save Template", "Send Mail", and "Close".

- Enter the e-mail address of the person you would like to send the message to, or click on the ellipses at the end of the 'Mail To' field to access your list of contacts. Press <TAB>.
- Enter the subject of the e-mail in the subject field. Press <TAB>.
- Enter the message you want to send. Press <TAB>.
- Click on the Send button to send the e-mail.
- When you are finished, click the Close button to exit the e-mail section.

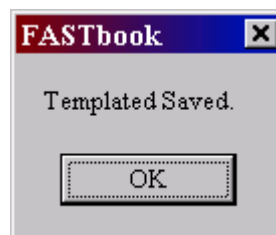
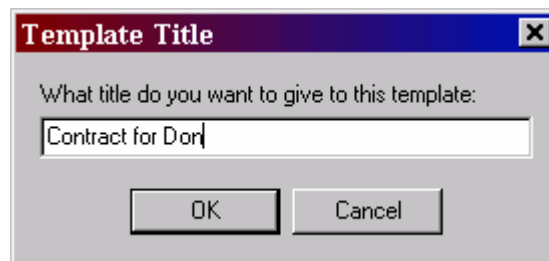
### 13.2 Creating an E-mail Template

#### **Creating an E-mail Template**

Templates allow you to save and re-use messages that you need on a regular basis.



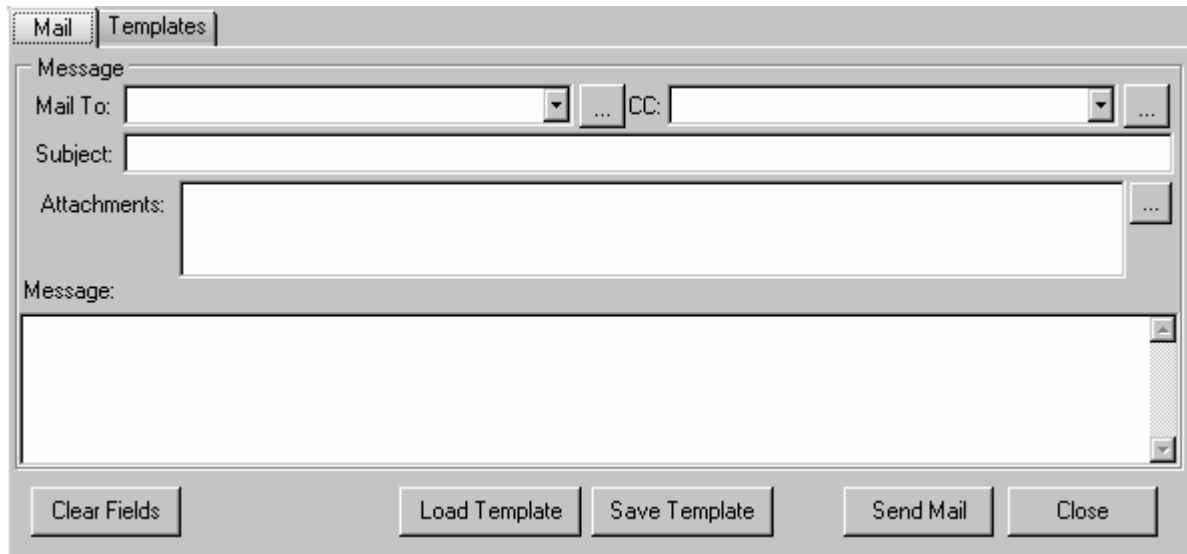
- To design a template, click on the Mail <Tab>.
- Enter the name or from the drop down window and select the name from the list.
- Enter a subject line for the template. The subject you enter will appear in the subject column of the table under the message text area in the e-mail window.
- Enter the body of the e-mail in the message text area.
- When you are finished, click on the Save Template button. You will be prompted to give your template a name. After naming the template click "OK" button. The subject and body of the e-mail will be saved in the template for easy access and future use.



## 13.3 Opening an existing Template

### Opening an Existing E-mail Template

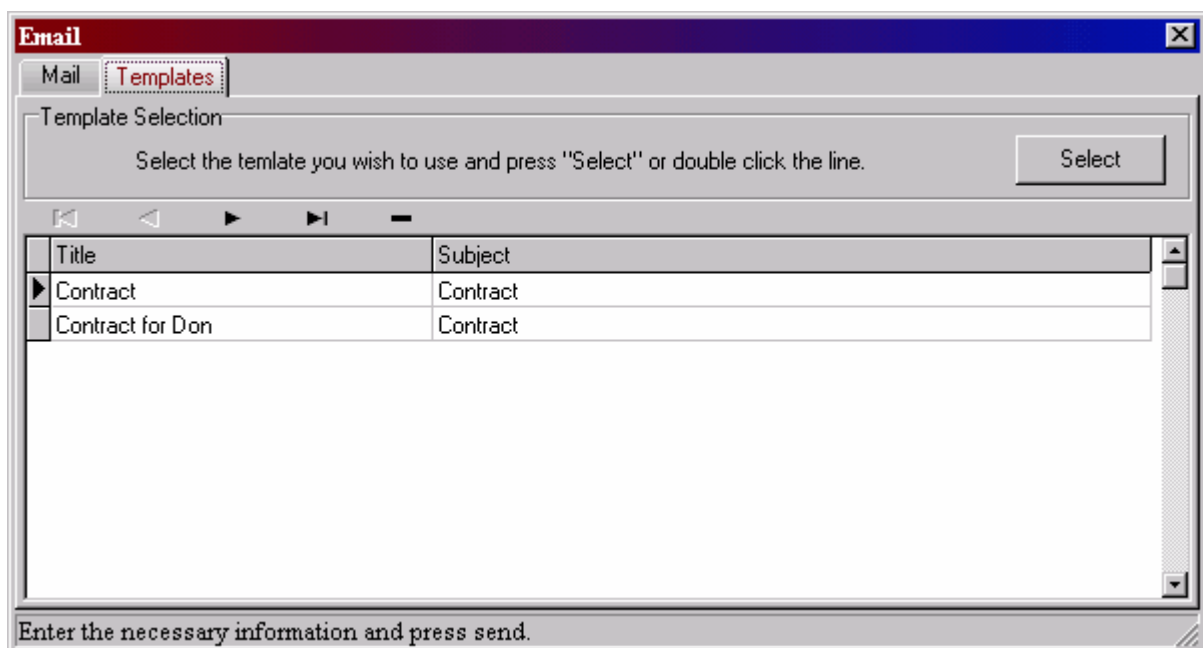
- Click on the E-mail button from the toolbar on the left side of the screen. The E-mail window will appear.



The screenshot shows the 'E-mail' window with two tabs: 'Mail' and 'Templates'. The 'Mail' tab is active. The window contains the following fields and buttons:

- Message:** A section containing:
  - Mail To:** A text input field with a dropdown arrow and an ellipsis button.
  - CC:** A text input field with a dropdown arrow and an ellipsis button.
  - Subject:** A text input field.
  - Attachments:** A text input field with an ellipsis button.
  - Message:** A large text area for the email body.
- Buttons:** 'Clear Fields', 'Load Template', 'Save Template', 'Send Mail', and 'Close'.

- Click on the Templates button from the Email window. The Templates Selection window will appear.
- Select from the list which Template you wish to use and press "Select" or double click the line.

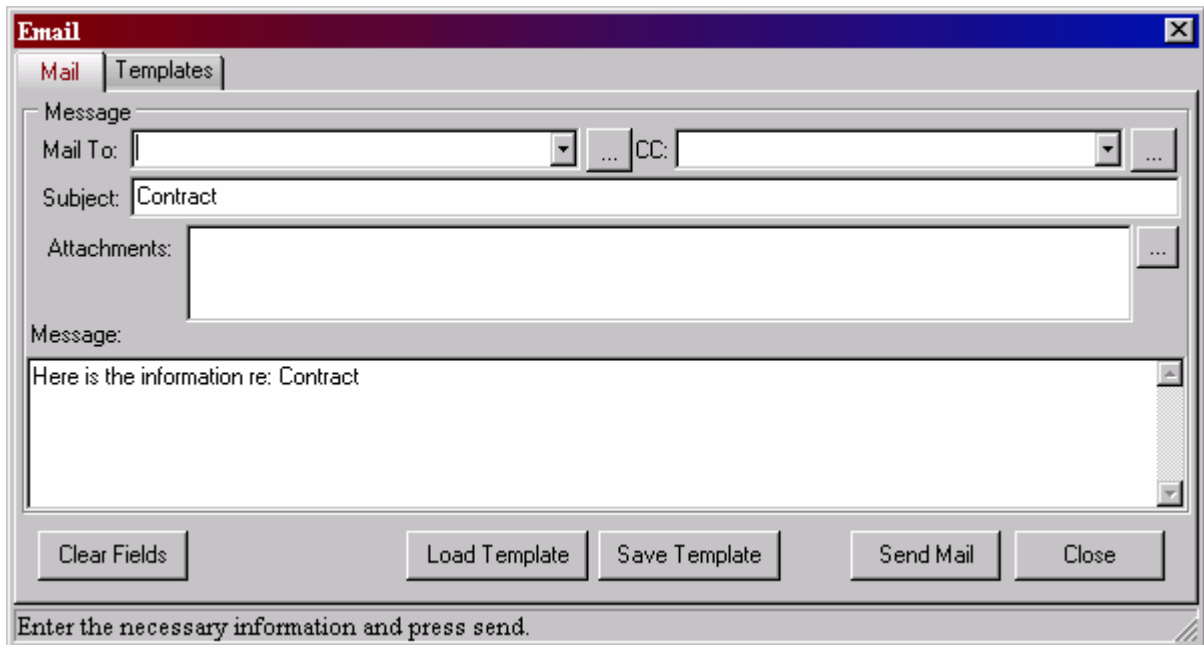


The screenshot shows the 'Email' window with the 'Templates' tab active. The window displays a 'Template Selection' dialog with the following elements:

- Instructions:** "Select the template you wish to use and press 'Select' or double click the line." with a 'Select' button.
- Navigation:** A set of navigation buttons (back, forward, search, etc.).
- Table:** A table with two columns: 'Title' and 'Subject'.

Title	Subject
Contract	Contract
Contract for Don	Contract
- Footer:** "Enter the necessary information and press send."

- The E-mail window will appear with "saved" template information - you are ready to create a new email.



**Email**

Mail | Templates

Message

Mail To:  ... CC:  ...

Subject: Contract

Attachments:  ...

Message:

Here is the information re: Contract

Clear Fields Load Template Save Template Send Mail Close

Enter the necessary information and press send.



**FASTbook 5.5**

# **Chapter**



**14**

Contact Management

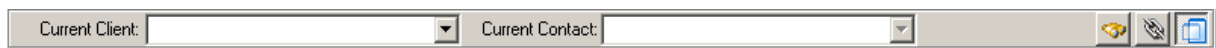
## 14 Contact Management

### 14.1 Overview

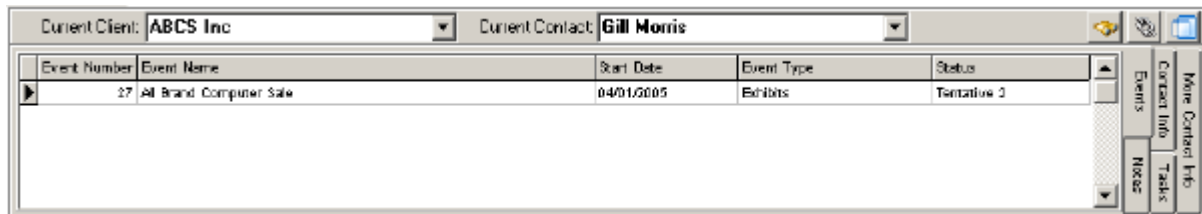
#### Contact Manager

The Contact Manager is a plug-in program that runs with Fastbook to facilitate the lookup of client/contact information while using Fastbook. The Contact Manager is found on the bottom of the Calendar. Within Contact Manager, you are able to add tasks and notes and look up events pertaining to a specific client and/or contact information.

The main Contract Manager view bar.



The current client view with current contact information.



Event Number	Event Name	Start Date	Event Type	Status
27	All Brand Computer Sale	04/01/2005	Exhibits	Tentative 3

To add Tasks - click on "Add Task Button."

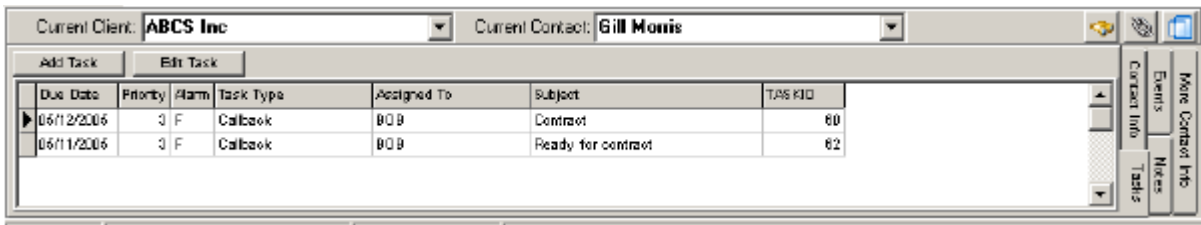


At the Add/Edit Task screen - enter task relating to client/contact.

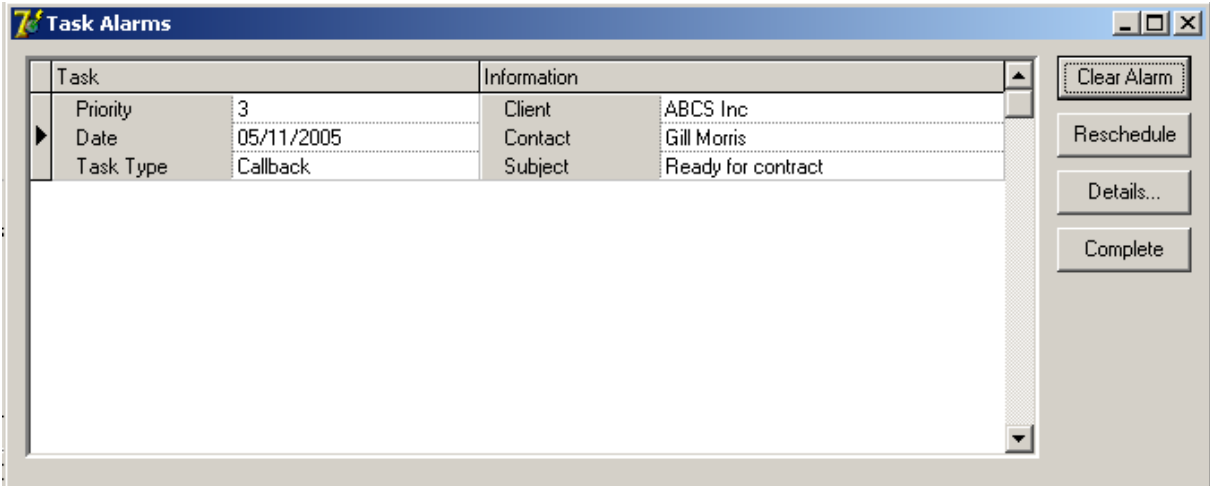


Due Date	Priority	Alarm	Task Type	Assigned To	Subject	TASK ID
06/12/2006	3	F	Callback	BOB	Contract	60
06/11/2006	3	F	Callback	BOB	Ready for contract	62

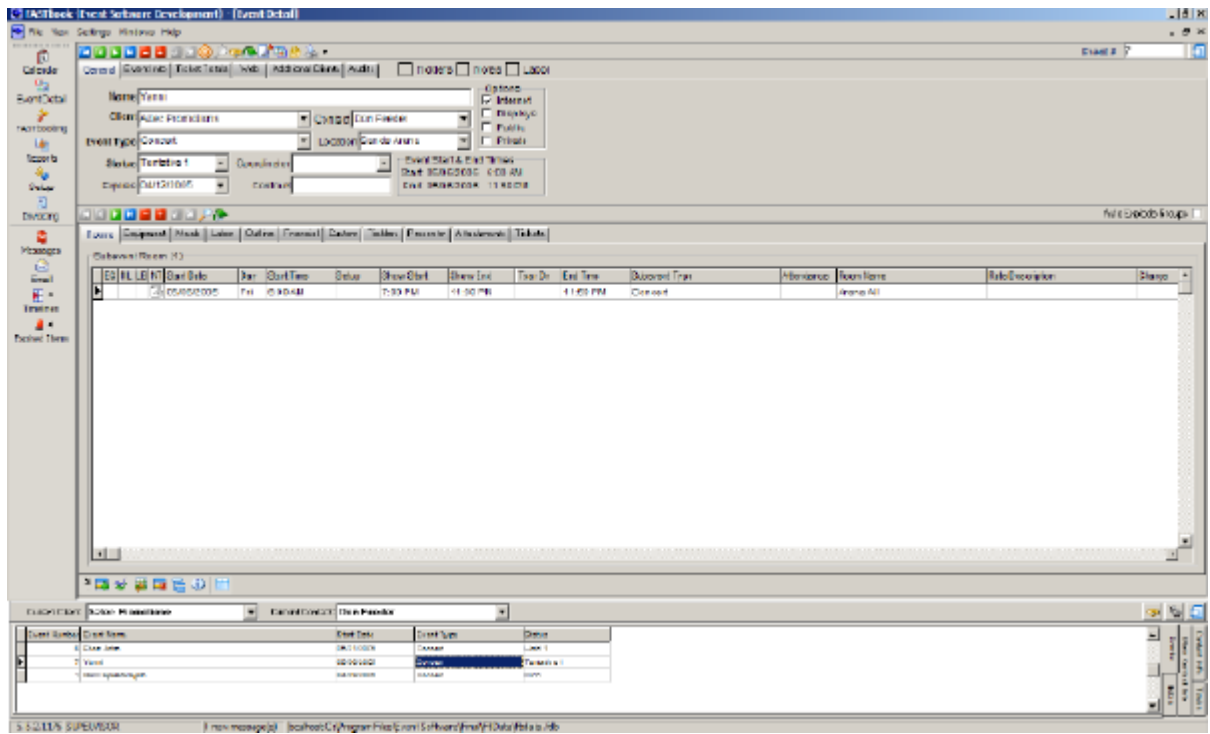
Task screen after assigned task.



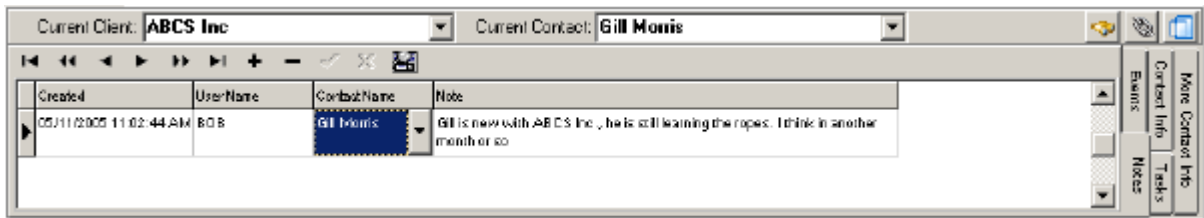
Task Alarms screen after assigning an alarm to specific task.



Events Tab - list all events associated to the current client.



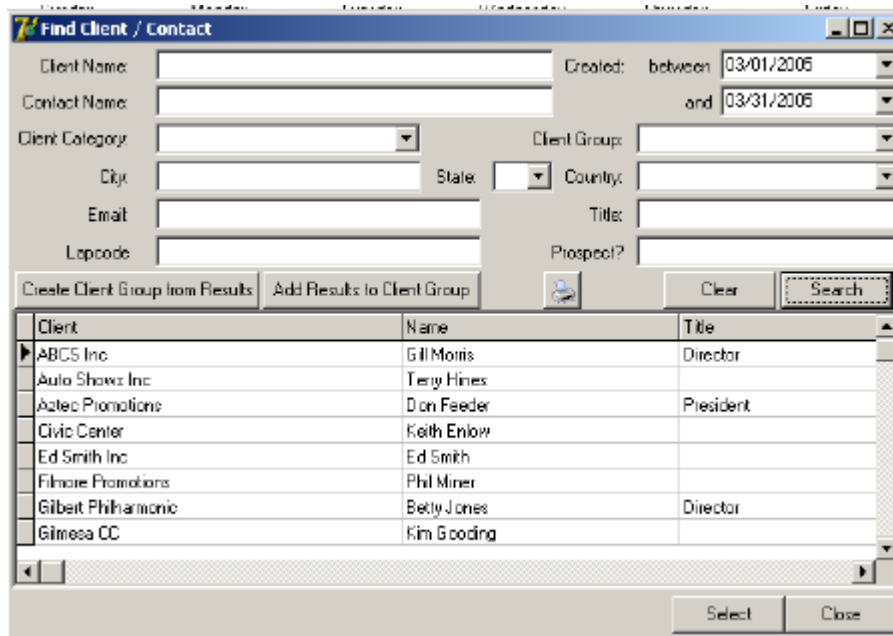
To add Notes - click on "Notes Tab."



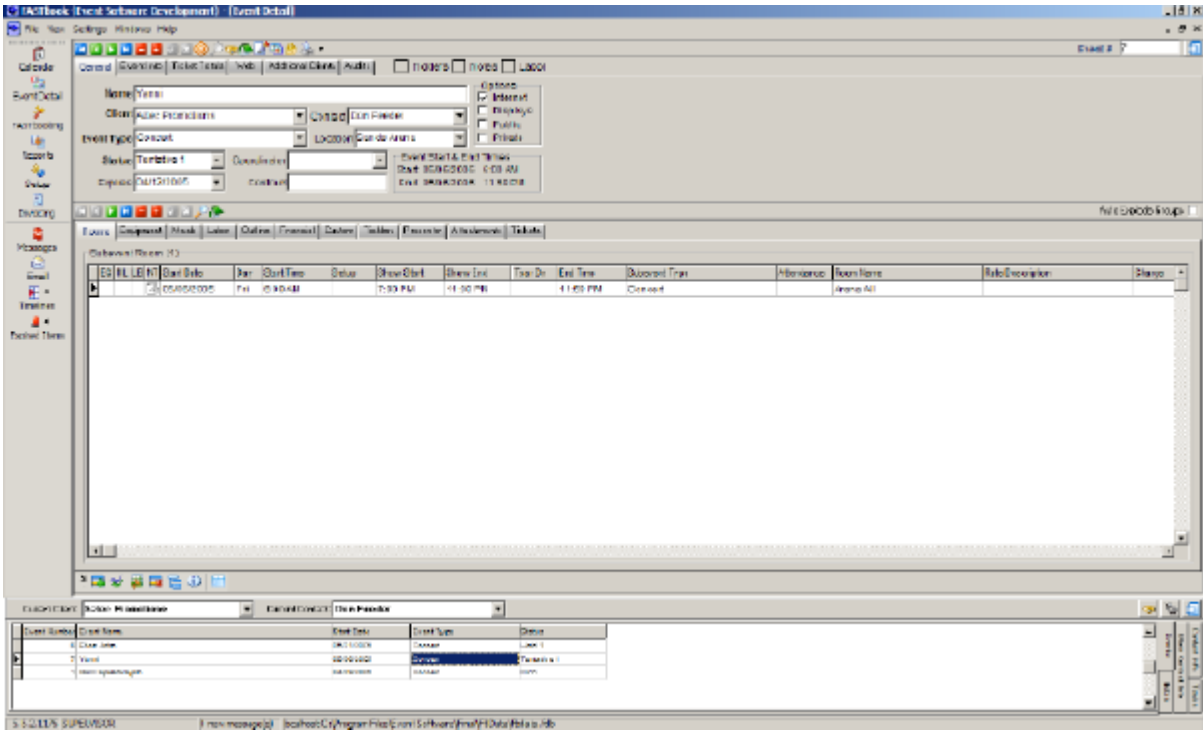
Contact Info Tab - list all demographic information pertaining to the specific contact.



### Find Contacts



### Link Contact Manager with Events



- Select the Chain Link button and this will allow you to link the events associated with the client in Event Detail.

For example, looking at Event #17 and having the linked selected will list all events in Contact Manager associated with that Client.

# FASTbook 5.5

# Chapter



15

Reports

## 15 Reports

### 15.1 Overview of Reports



#### Overview

FASTbook Reports has over 2000 report combinations to help the FASTbook User easily and quickly print precisely the report desired. In this way, FASTbook Reports helps the FASTbook User communicate more effectively than ever before to customers, prospects, vendors and facility staff.

Providing a reporting system that is easy to use, highly flexible, and powerful has been achieved through a standard set of over 2-dozen (and constantly growing) **highly customizable standard report templates**. The main features of the highly customizable standard report templates are:

- Functional Groupings of Report Templates
- Selectable Field Column
- Levels of Row Sort Order Control
- Single and Multiple Value Filtering Criteria

FASTbook Reports makes finding the right report template quick and easy. The **standard report templates are organized by business function** and grouped under the following common daily work activities of:

- Calendar
- Operations
- Management
- Financial
- Custom

Once selected, each standard report template allows the FASTbook User to control report information content by providing from one to three **selectable field columns** on each report template. All selectable field columns allow FASTbook Users to choose from a subset of standard FASTbook data fields. But even more, each report template provides the FASTbook User an option to choose from all User Defined data fields on one and often two of the "selectable field" columns.

After the standard report template's information content has been defined, each standard report template also gives the FASTbook User **control over the sort order** of the report. Each standard report template provides for User Control over the 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> sort levels. Where appropriate, the FASTbook User may also have control over the 1<sup>st</sup> sort level that determines the highest level report grouping of the report information. With control over sort order, the FASTbook User can display the report information in the most meaningful order possible to fit virtually any reporting needs.

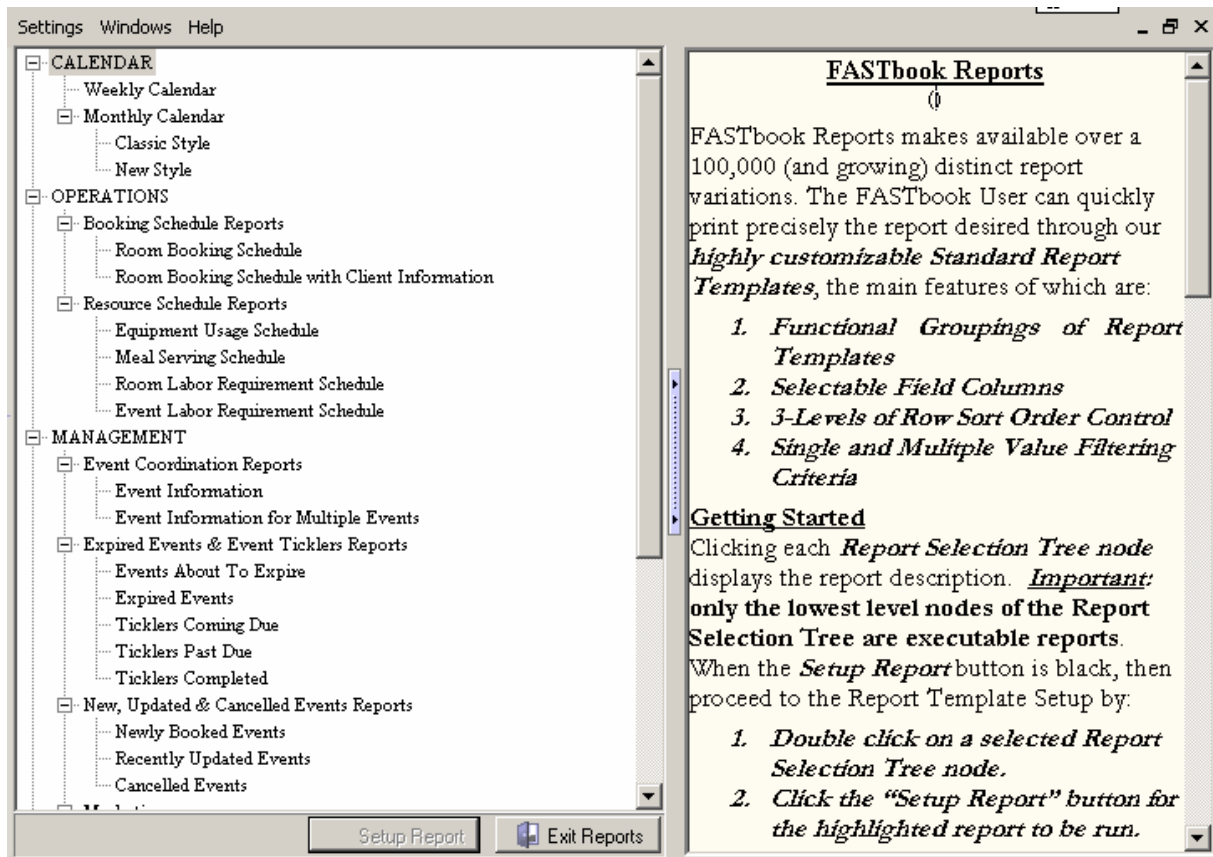
In addition to control over row sort order, each standard report template provides the FASTbook User with a **variety of single and multiple value filtering criteria**. The option to select from a variety of filtering criteria allows the FASTbook User to generate a report with precisely the information content required, with no more and no less than is necessary. FASTbook 5.5 Reports provide the FASTbook User with exceptional and previously unavailable reporting power. The Selectable Field Columns feature alone delivers over 2,000 distinctly customized report variations. When combined with the sort order and filtering options, the **FASTbook User literally has over 100,000 different FASTbook report variations** at their fingertips.

Finally, Event Software is always willing to explore development of a **Custom Report** whenever a Standard Report Template cannot meet a Customer's reporting requirements.

## 15.2 Selecting a Report

### Selecting a report

**FASTbook 5.5 Reports** can be started one of two ways. Either click-on the **Reports Button** on the left side of the screen or go to the file menu and select "Reports" under the view section.



Once the **Reports** has been selected, FASTbook 5.5 Reports will open with the **Report**



**Selection Tree** on the left side and a **Report Description & Use Specification** on the right.

Notice that on initial entry into FASTbook Reports, the **Setup Report button** in the lower right hand corner is grayed out or unavailable, i.e., the grayed out status indicates that clicking the button will have no effect. Also, notice by clicking on each **Report Selection Tree node** that every node has a unique description on the right hand side. **Note that only the lowest level nodes of the Report Selection tree are executable reports.** Therefore, selecting one of the lowest level nodes of the Report Selection Tree is the only way to change the **Setup Report button** text to black.

**When the Setup Report button text is black, then an executable report has been selected and the FASTbook User may proceed to the Standard Report Template Setup screen by one of two methods. To proceed to the Standard Report Template Setup screen by one of two methods that is highlighted, the FASTbook User may either:**

- Click on the report you want to run then Click the "Setup Report" button

## 15.3 Report Setup

### Report Setup

Once the FASTbook User has selected a Standard Report Template, then the **Report Setup for "selected report" Standard Report screen** will appear.

The Report Setup for a Standard Report screen is the engine that allows the FASTbook User to define almost unlimited variations of a Standard Report template and generate exactly the report they want. Each Report Setup section supports the major ways that we at Event Software, have learned that FASTbook Users want to customize the presentation of report content and layout.

The Report Setup screen is organized into 3 main sections.

- Report Orientation & Paper Size
- Report Column Layout & Sort Order
- Report Filtering & Selection Criteria

### 15.3.1 Report Orientation & Page Size

#### Report Orientation & Page Size

The **Report Orientation & Page Size** is the topmost and first major section of the Report Setup for a Standard Report screen.



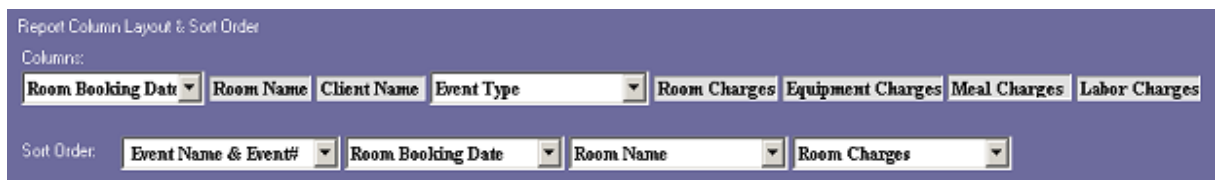
The Report Orientation & Page Size section allows the FASTbook User to select the following:

- Print Orientation - Portrait and Landscape are generally available options. A few report templates limit Print Orientation to one or the other. Default Print Orientation is specific to each Report.
- Paper Size - Letter and Legal Size are available options for both Print Orientations
- Manual Feed - Useful when the default Printer has no Legal Size Paper bin and Manual Feed is the only option for printing on Legal Size Paper. Defaults to "unchecked".

## 15.3.2 Report Column Layout & Sort Order

### Report Column Layout & Sort Order

The **Report Column Layout & Sort Order** is the second major section of the Report Setup for a Standard Report screen.



The **Columns** area of the **Report Column Layout & Sort Order** section presents the columns of information that are available for printing on the Report. The **Columns** area of each Report Column Layout & Sort Order section of the standard Report Template has the following characteristics:

- Left to right order of column names - Match the order that the columns will actually appear on the report.
- Gray background boxes - Represent static or constant columns that will always appear.
- Selectable Columns - Represent User modifiable columns with at least 2, and often up to a dozen, selectable columns available. (Note: If the selectable column you want does not appear in the drop down list, please call us. We are always willing to consider adding additional selectable columns that are useful to our customers.)



The Sort Order area of the **Report Column Layout & Sort Order** section presents the columns that FASTbook Users may select in order to alter the sequence order of row information that will print on the final report.

Quite often the default values will satisfy most reporting requirements. In those cases where a different sort order will present the information in a more meaningful way, click on a selectable field to view the sort options available to you. Select the sort order from each one of the selectable fields that you want for the report.

### 15.3.3 Report Column Filtering & Selection Criteria

#### Report Column Filtering & Selection Criteria

The **Report Column Filtering & Selection Criteria** is the third and last major section of the Report Setup for a Standard Report screen.

The Report Column Filtering & Selection Criteria section of the report setup screen will allow you to filter on different criteria and has the following characteristics:

- **Single Value Filters** - Provides the ability to filter report information content with 3 to 6-major columns. (Note: If the single value filter you want does not appear, please call us. We are always willing to consider adding additional filters that are useful to our customers.)
- **Date or Date Range** - Filtering by a specific date or a Date Range, i.e., start and end dates, which are included in the selection. All of the date ranges in the reports section can be changed to meet your needs. Default ranges are set, but the report setup screen for every report gives you the option to change the dates the report will use.

- Multiple Value Filters - Provides the ability to filter report information content with 1 or 2 multiple value filters that allow the selection of one or more and any combination of values.

Once all the Report Setup for a Standard Report has been completed, then clicking the **Run Report button** in the lower right hand corner of the ReportSetup for a Standard Report screen will execute the Report.

### 15.3.4 Report Preview

#### Report Preview

**Event Software Development**  
**Booked Revenue By Event Number**  
*August 1, 2004 through August 20, 2004*  
 for All Locations and All States  
 Sorted by Event Name & Event, Room Name, Room Charges, Room Booking Date

Booking Date	Room Name	Client Name	Client Category	Room	Resource Charges		
					Equipment	Meals	Labor
<u>loan Test - 6422</u>							
02-Aug-2004	A Test Room	Youth Pastors Network	Standard				
				<b>Event Subtotal Charges:</b>	\$0.00	\$0.00	\$0.00
				<b>Event Total Charges:</b>	\$0.00		
<u>fun time event - 6425</u>							
20-Aug-2004	A Test Room	Youth Pastors Network	Standard	\$185.00			
03-Aug-2004				\$310.00			
05-Aug-2004				\$310.00			
				<b>Event Subtotal Charges:</b>	\$405.00	\$0.00	\$0.00
				<b>Event Total Charges:</b>	\$405.00		
<u>prezels 3 - 6430</u>							
04-Aug-2004	All Lobbies	Youth Pastors Network	Standard	\$11,000.00			
				<b>Event Subtotal Charges:</b>	\$11,000.00	\$0.00	\$21.25
				<b>Event Total Charges:</b>	\$11,021.25		
<u>prezels - 6429</u>							
04-Aug-2004	Box Office	Youth Pastors Network	Standard				
				<b>Event Subtotal Charges:</b>	\$0.00	\$0.00	\$0.00
				<b>Event Total Charges:</b>	\$0.00		
<u>test - 6428</u>							
04-Aug-2004	Ballroom	Youth Pastors Network	Standard		\$0.00	\$0.00	\$0.00
				<b>Event Subtotal Charges:</b>	\$0.00	\$0.00	\$0.00
				<b>Event Total Charges:</b>	\$0.00		
				<b>Report Subtotal Charges:</b>	\$11,405.00	\$0.00	\$21.25
				<b>Report Total Charges:</b>	\$11,826.25		

Printed on Aug 13, 2004 - 09:23 AM  
 Page 1 of 1  
 © 1995-2004, Event Software

The Report will always appear in **Print Preview** mode.



In Print Preview mode, several options are available to the FASTbook User. Buttons for these options are provided at the top of the preview page.

- ◆ Click on the whole page button (located farthest to the left) on the Report Preview Toolbar to view the entire report page.
- ◆ Click on the page width button on the Report Preview Toolbar to view the report at page width (this is the default selection).
- ◆ Click on the 100% button to show the report at the percentage value specified in the percentage field.



**NOTE:** The arrows allow for navigation between pages of the report. The arrow pointing to the left with a bar in front of it will take you to the first page of the report while the arrow pointing to the right with the bar in front of it will take you to the last page of the report. The arrow pointing to the left without a bar will take you to the previous page of the report. The arrow pointing to the right without a bar will take you to the next page in the report.

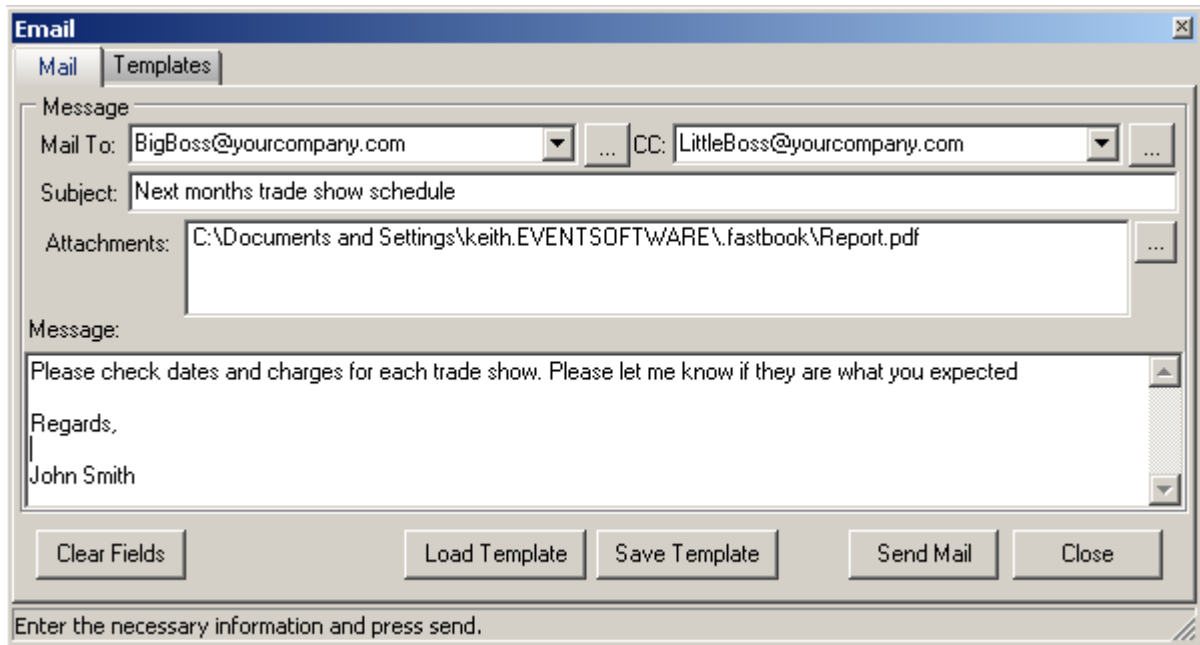
- ◆ Click on the "Report Setup" button to return to the report setup screen if you want to make any changes to the content of the report.
- ◆ Click on the print button to print the report.
- ◆ Click on the e-mail button if you would like to e-mail the report.

## 15.4 E-mailing a Report

### E-mailing a Report

To e-mail a report click on the Envelope icon in the Report Preview Toolbar at the top of the report preview screen. The E-mail window will open with the report name in the subject line and directions about viewing the report in the email body.

- Enter the e-mail address for the person(s) you would like to send the report to. You can enter the address manually or you can click on the "To..." button to open an address book and select the e-mail address(es) from a predefined list.
- Enter any additional comments in the e-mail body.
- Click the "Send" button to send the report.
- Click the "Cancel" button if you want to abort the e-mail and return to the report preview screen.



**Email**

Mail | Templates

Message

Mail To: BigBoss@yourcompany.com ... CC: LittleBoss@yourcompany.com ...

Subject: Next months trade show schedule

Attachments: C:\Documents and Settings\keith.EVENTSOFTWARE\fastbook\Report.pdf ...

Message:

Please check dates and charges for each trade show. Please let me know if they are what you expected

Regards,

John Smith

Clear Fields Load Template Save Template Send Mail Close

Enter the necessary information and press send.

**FASTbook 5.5**

# **Chapter**



**16**

**Utilities**



## 16 Utilities

### Utilities

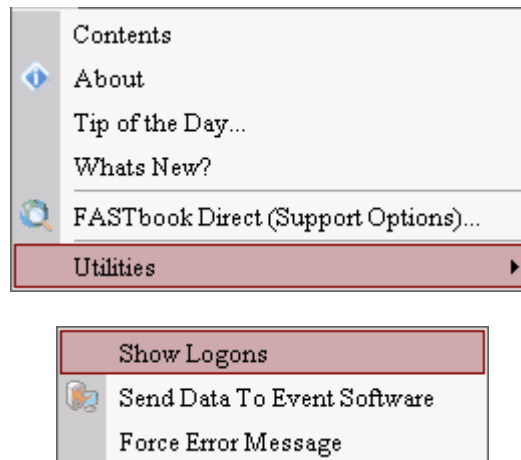
The Utilities is part of **FASTbook's** file system within the Help menu and is comprised of three components: Show Logons, Send Data to Event Software, and Force Error Message.

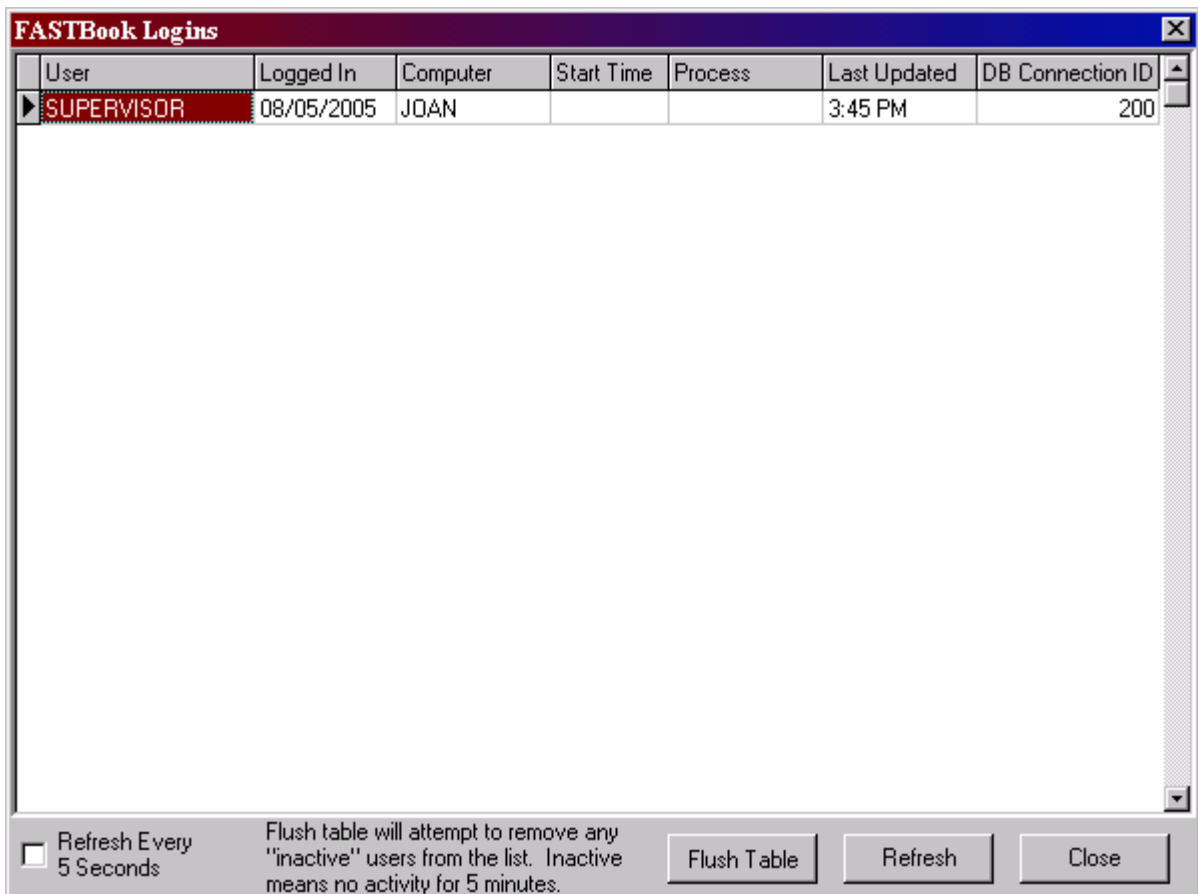


**NOTE:** To be able to access the Utilities, you must use the Supervisor sign-on and Supervisor's Password.

The Show Logons - allows the Supervisor of Fastbook to see all active/inactive users logged into Fastbook and gives the Supervisor the ability to force any hung sessions to be cleared.

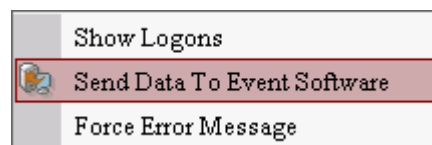
- From the Help window - select Utilities; a second drop-down window will appear.



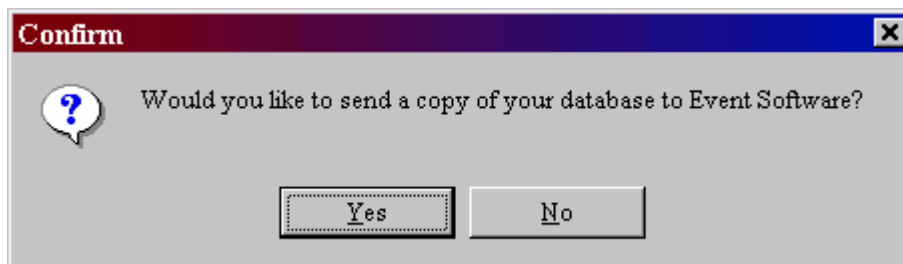


- From the Fastbook Logins window - select the User that needs to be cleared and click "Flush Table" <TAB>.
- After the User had been Cleared, click on "Close" <TAB> to exit.

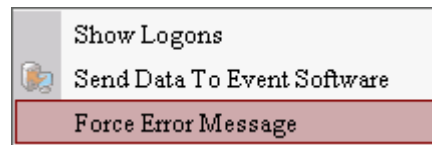
**The Send Data To Event Software** - allows the Supervisor of Fastbook to electronically send his/her database to Event Software for technical support issues and/or database upgrades.



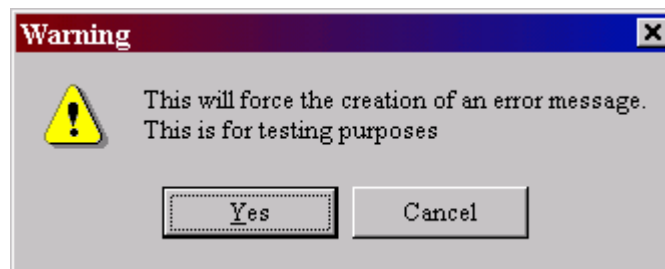
- Click on the Send Data To Event Software window.
- A window will appear - asking "Would you like to send a copy of your database to Event Software" click on "Yes" to send.



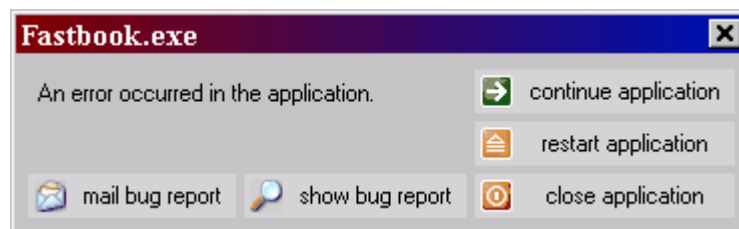
The Force Error Message - Will force the creation of an error message for testing purposes.



- Click on the Force Error Message.
- A window will appear asking "This will force the creation of an error message." This is for testing purposes. Click on "Yes" to proceed.



- Click on the "mail bug report."



**FASTbook 5.5**

# **Chapter**



**17**

Appendix B: Troubleshooting

## 17 Appendix B: Troubleshooting

### 17.1 Overview

- [1. When I sign on to Fastbook, I receive the following message: Unknown or unavailable data base.](#)
- [2. What is the BDE used for in Fastbook?](#)
- [3. How do you install Fastbook on a work station?](#)
- [4. I click on the email icon and get the following message: You do not have a SMTP Host name set in setup. What does this mean?](#)
- [5. Why do I get prompted to enter a location when trying to book an event using Fastbooking?](#)
- [6. Can I create a report in Fastbook and save it in Excel Spreadsheet format?](#)
- [7. Why are my calendar colors different from another Fastbook users'?](#)
- [8. Why do I get no available licenses when trying to sign on to Fastbook?](#)
- [9. Where is the Calendar Filter option found in Fastbook 5.5?](#)
- [10. How can I turn off the Hint Help when using Fastbooking?](#)

#### **1. When I sign on to Fastbook, I receive the following message: Unknown or unavailable data base.**

Check the number of available licenses to make sure there is at least one license available. Do the users have proper permissions to access Fastbook and have rights been established? Has the BDE (Borland Data Engine) interface been installed properly and is it pointing to the correct data path? And finally, check and see that Firebird Services are up and running.

#### **2. What is the BDE used for in Fastbook?**

The BDE (Borland Data Engine) is a tool that runs on the client workstation and allows the Fastbook application to communicate with the data base via a data path link.

#### **3. How do you install Fastbook on a work station?**

From the work station that needs Fastbook installed, the user must be logged in as Administrator. After the user is logged in, he/she needs to go to :\\FBWIN50\\BIN folder and run WSsetup50.exe. This will launch the work station install program - follow the prompts to successfully install the work station. If you still need further assistance, refer to the Fastbook 5.5 Help manual - workstation install.

#### **4. I click on the email icon and get the following message: You do not have a SMTP Host name set in setup.**

This is due to the fact that there are no SMTP (Simple Mail Transfer Protocol) parameters defined in Fastbook's Setup under the Center Profile, Internet Settings.

#### **5. Why do I get prompted to enter a location when trying to book an event using Fastbooking?**

The Fastbook Administrator and/or Supervisor has required, for booking purposes, that locations be utilized when booking an event to be associated with a particular building or physical location.

#### **6. Can I create a report in Fastbook and save it in Excel Spreadsheet format?**

Most definitely so - after you run the report and the results are on the screen, click on the printer icon, locate the Print to File, checkmark the box, under Type click on drop down, and select Excel File. Next, click on the elipsis button and the Save in the window should appear type in name of report. Click the save button. That's all there is to it!

#### **7. Why are my calendar colors different from another Fastbook users'?**

This is usually associated with the customization of the calendar at setup time when Fastbook was initially installed. To customize the calendar - from calendar view click on Settings, Personal Preferences, Calendar - you should now be able to change colors for background and font colors to better fit your daily needs when viewing the calendar.

**8. Why do I get no available licenses when trying to sign on to Fastbook?**

The Fastbook user is either already signed on at another work station or the work station could be frozen and Fastbook needs to be shut down and restarted. Check available number of licenses to make sure there is at least one license available. Make sure the users have proper permissions to access Fastbook and that rights have been established.

**9. Where is the Calendar Filter option found in Fastbook 5.5?**

The calendar filter options are now located on the calendar main view in the box that says **<not filtered>**. To create a new calendar filter, click on the green syphon and then click on Filters <tab> and choose which type of filter you now want to create.

**10. How can I turn off the Hint Help when using Fastbooking?**

This can be accomplished by clicking on Settings and unchecking Show Hint Help. It's that easy!

**FASTbook 5.5**

# **Chapter**



**18**

Support Options

## 18 Support Options

### 18.1 Customer Support

#### Customer Support

**When Purchasing Fastbook** - Unlimited technical support and enhancements are covered for one full year. Beginning year two, you will be charged an annual maintenance fee to continue unlimited technical support and free upgrades. Beginning year two, if you decide not to pay the annual maintenance, you may pay an hourly rate for support.

**New Releases** - We are constantly improving FASTbook. Two to three times a year we release a new version with enhancements based on feedback from our customers. The new features we add reflect the changing needs and increasing complexity of facilities and their task of scheduling events.

**Phone Support** – Our regular business hours are from 7:30 AM to 5:00 PM MST. Call 480-517-9990. Whether you're having a problem or just have a "how to" question--we're here to help.

**Response Time** – Our average response time weekdays 7:30 to 5:00 MST. is **10 minutes**, and average resolution time is **30 minutes**

**'Ask a Tech'**- if you have a question to ask a tech but don't need an immediate answer, use our [online form](#) and we promise to have a written response to you within 24 hours.

**Client Page** – Clients can enter [Release Update](#) to get information on our latest software releases and keep up with the latest happenings at **Event Software**.

### 18.2 Virtual Network Computing

**Virtual Network Computing (VNC)** – Have you ever had trouble communicating with your technical support person and thought if he could just see my screen, he would understand? Now he can see your screen. Call and ask us about setting up VNC with us. VNC is a remote connectivity option (developed by AT&T Laboratories) that allows us to view your FASTbook Users desktop from our location. VNC is completely secure because your users initiate the connectivity to us.

We recommend VNC for training and technical support. VNC increases our technical support and customer service staff effectiveness by allowing us to see directly in real-time what is happening on your machine. VNC works over the Internet and can be accessed from virtually anywhere by any type of computer. Once you have installed VNC, you can grant our technical support access to the desktop of your computer to watch or fine tune your application. **NOTE:** In some cases (though not all) you may need to contact your Network Administrator to configure the Internet firewall to open up the VNC access ports.



**FASTbook 5.5**

# **Chapter**



**19**

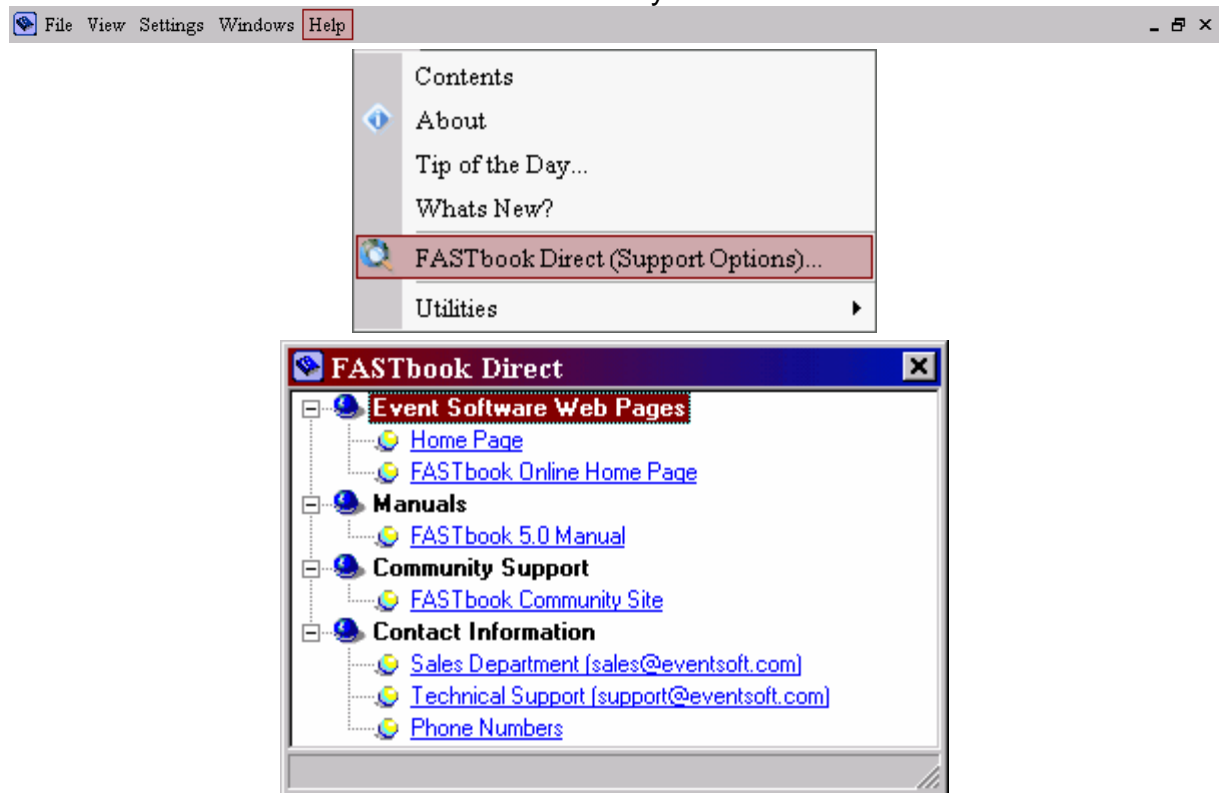
Improving FASTbook

## 19 Improving FASTbook

### 19.1 Input from our customers

**FASTbook Direct - Your direct connection to Event Software.** Need to send a message or get an answer 24-7. It's like having a direct line to Event Software or other facilities that use FASTbook. When you have a question or a problem, want to make a comment, a suggestion or ask another facility how they use Fastbook; it's now one mouse click away.

From the Main Interface in **FASTbook's** file system click:



#### Listening to our Customers

Our Customers needs determine our implementation schedule for product enhancement. At Event Software we take great pride in listening to and responding to our Customers current and future needs. We generally respond to our customers' enhancement requests within 5 business days. Even though each enhancement request is considered on its individual merits, arenas and convention centers represent the largest segment of our Customer base and are given priority service.

**'Have an Idea'**- if you have an idea or something you would like to see changed or added to Fastbook, let us know, call us or use our [online form](#) and we promise to have a written response to you within 24 hours.

# FASTbook 5.5

# Chapter



20


Uninstall Fastbook

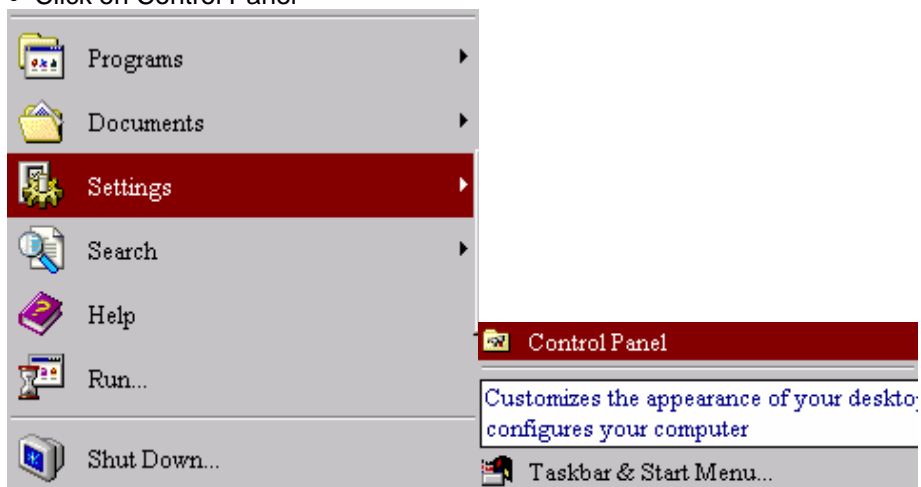
## 20 Uninstall Fastbook

### 20.1 Uninstall

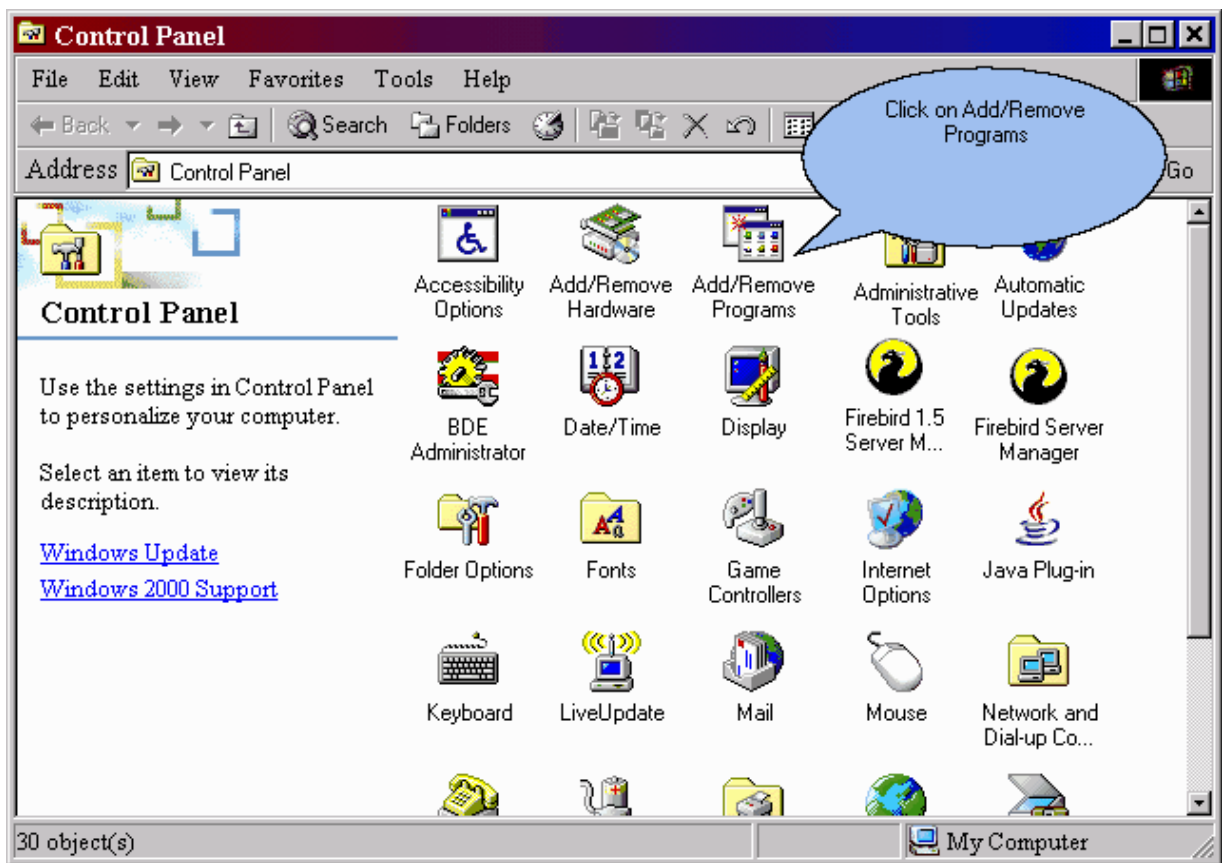
#### How do I uninstall FASTbook?

The following will instruct you how to uninstall FASTBook 5.5 from a local workstation.

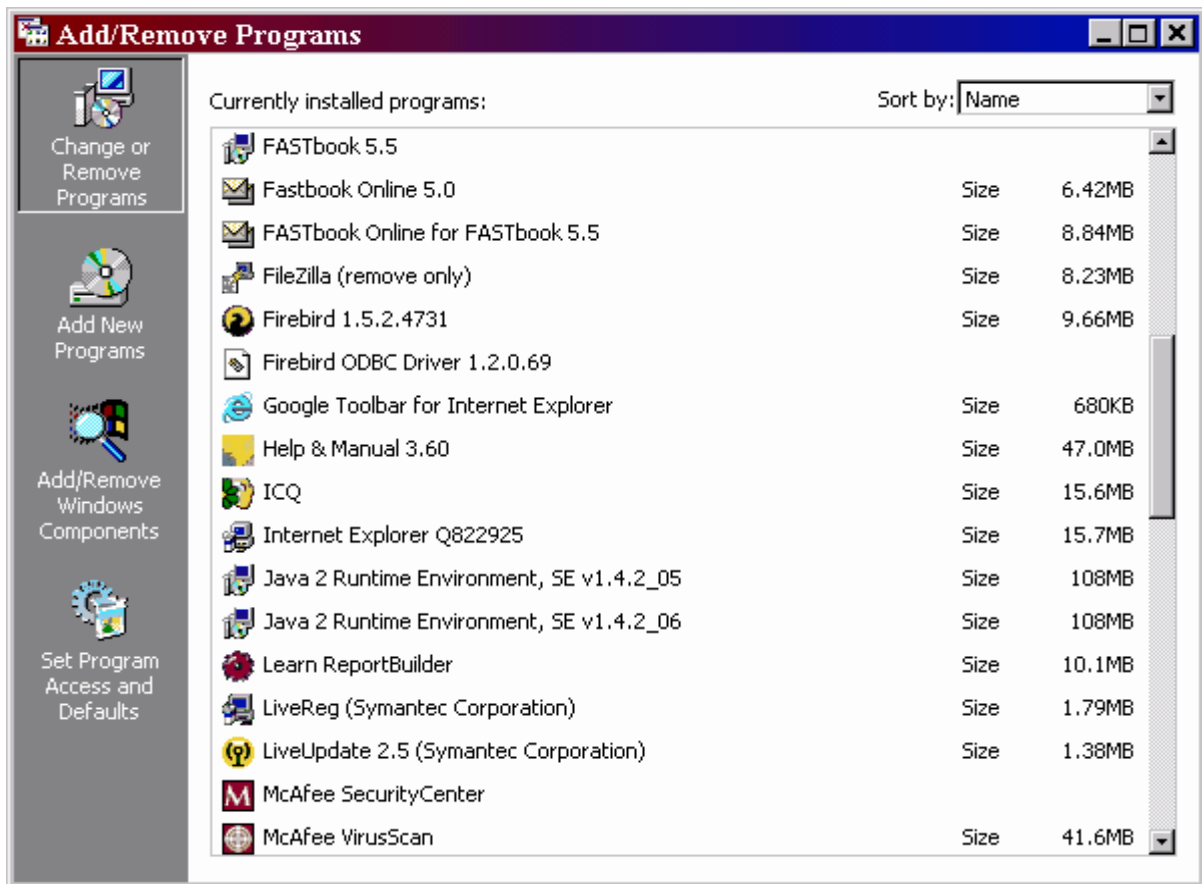
- Click on  Start
- Click on Settings
- Click on Control Panel



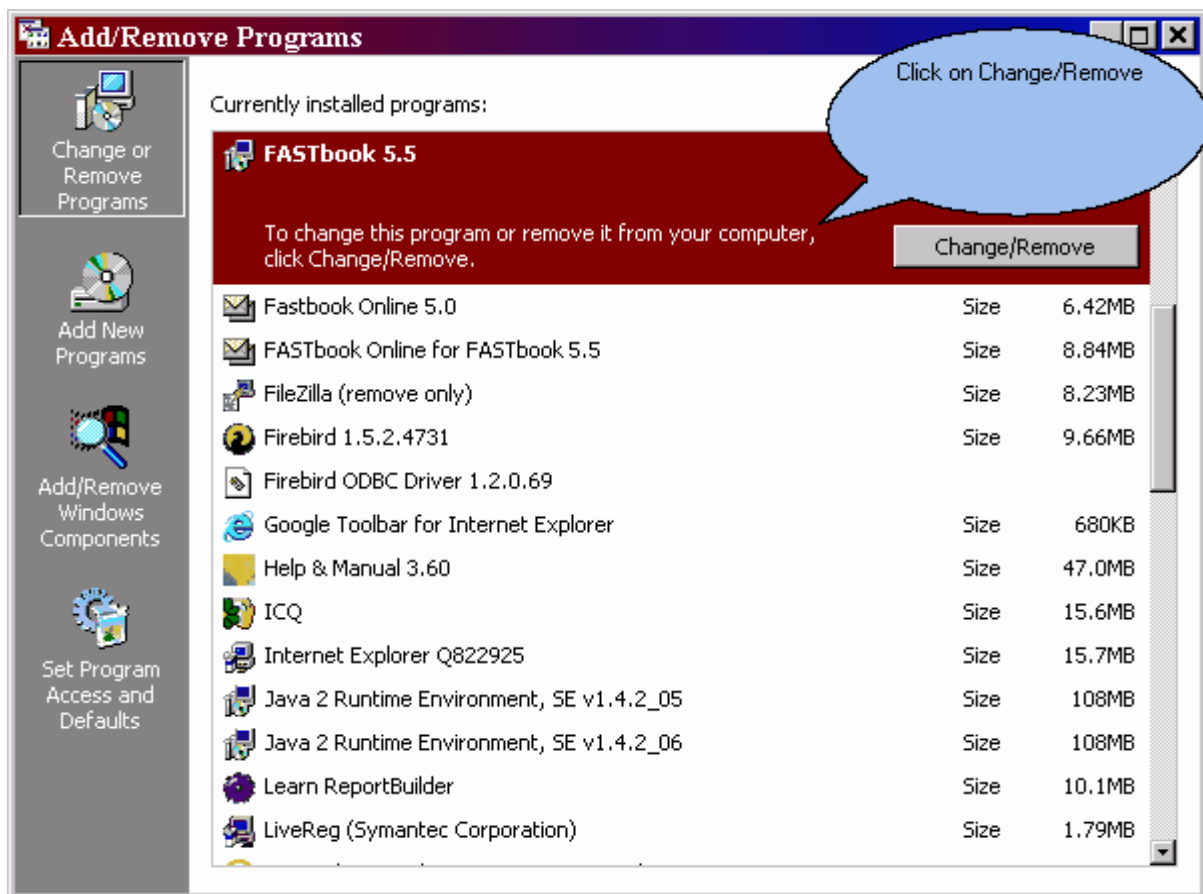
- The Control Panel window appears
- Click on Add/Remove Programs



- The Add/Remove Programs window appears
- Scroll down thru window until locate Fastbook 5.5

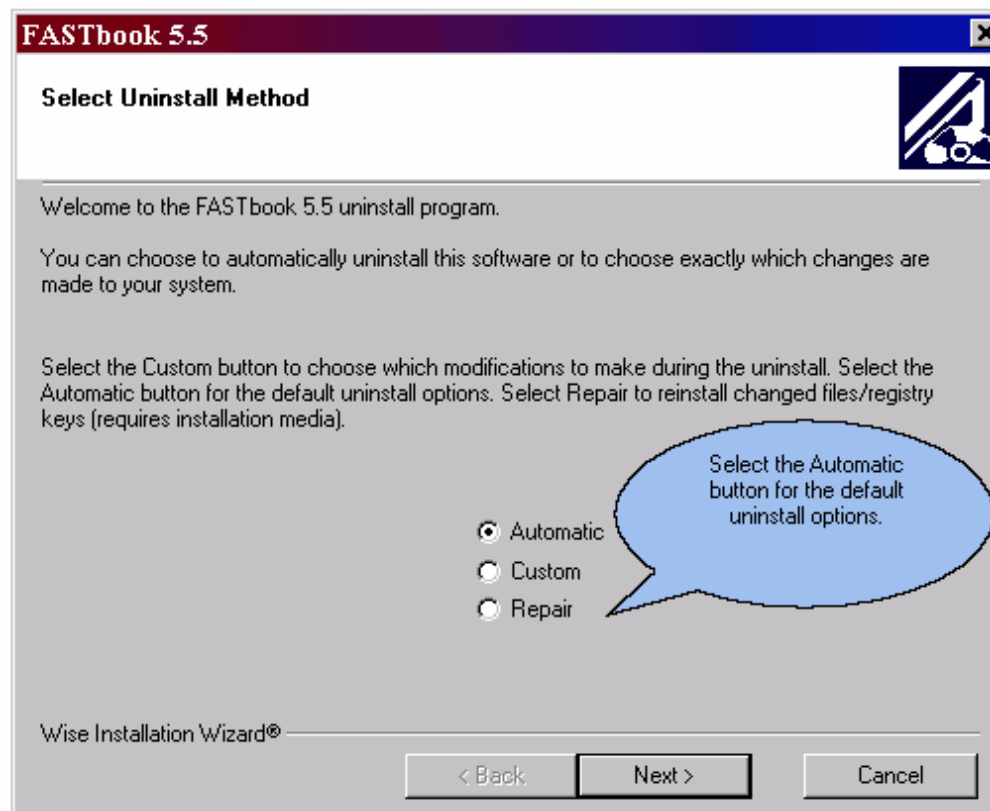


- Click on Fastbook 5.5 - Change/Remove box appears
- Click on Change/Remove



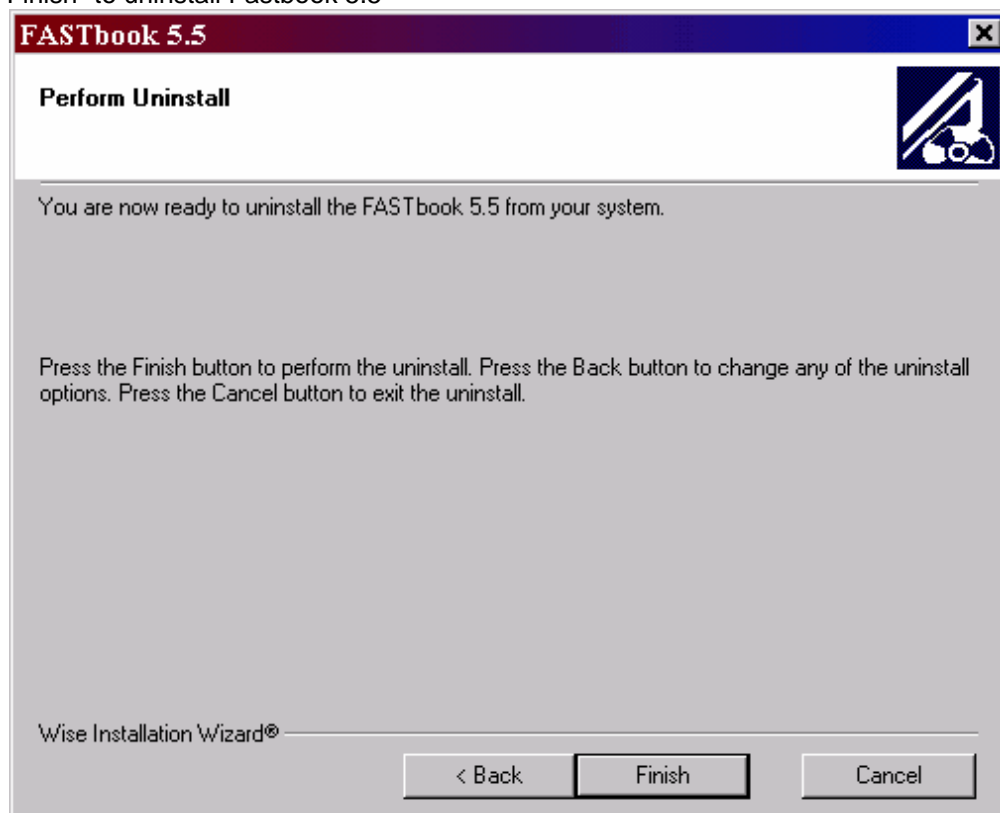
The Fastbook 5.5 Select Uninstall Method window appears  
The radio button should be on Automatic

- Click "Next" to start uninstall of Fastbook 5.5



The Perform Uninstall window appears

- Click "Finish" to uninstall Fastbook 5.5





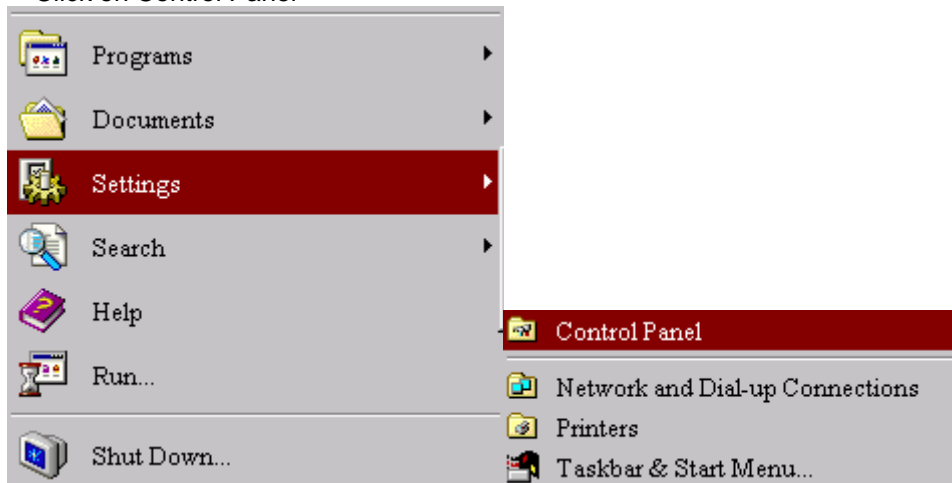
- To uninstall Fastbook 5.5 on another local workstation - repeat the same process.

## 20.2 Firebird ODBC

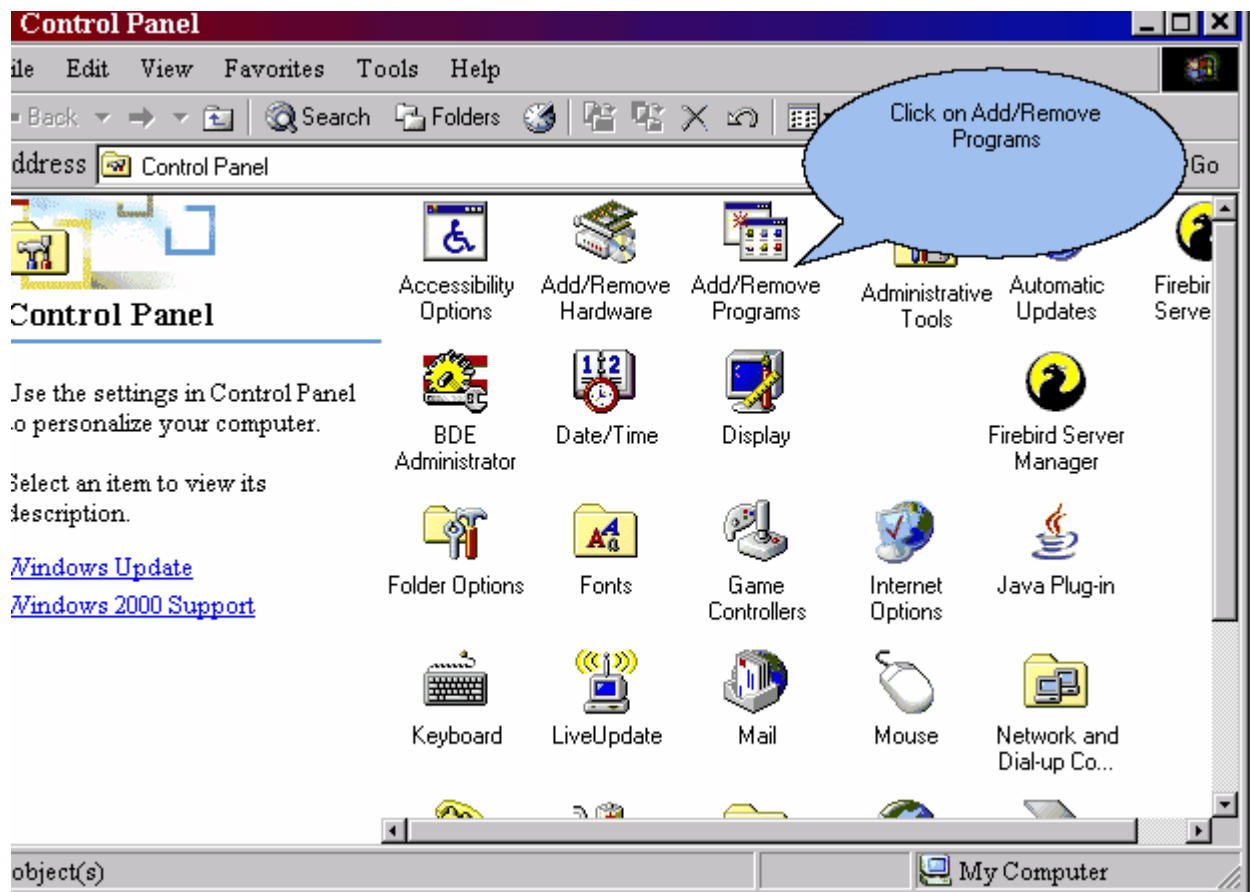
- How do I uninstall Firebird ODBC Driver?

The following will instruct you how to uninstall Firebird ODBC from a local workstation.

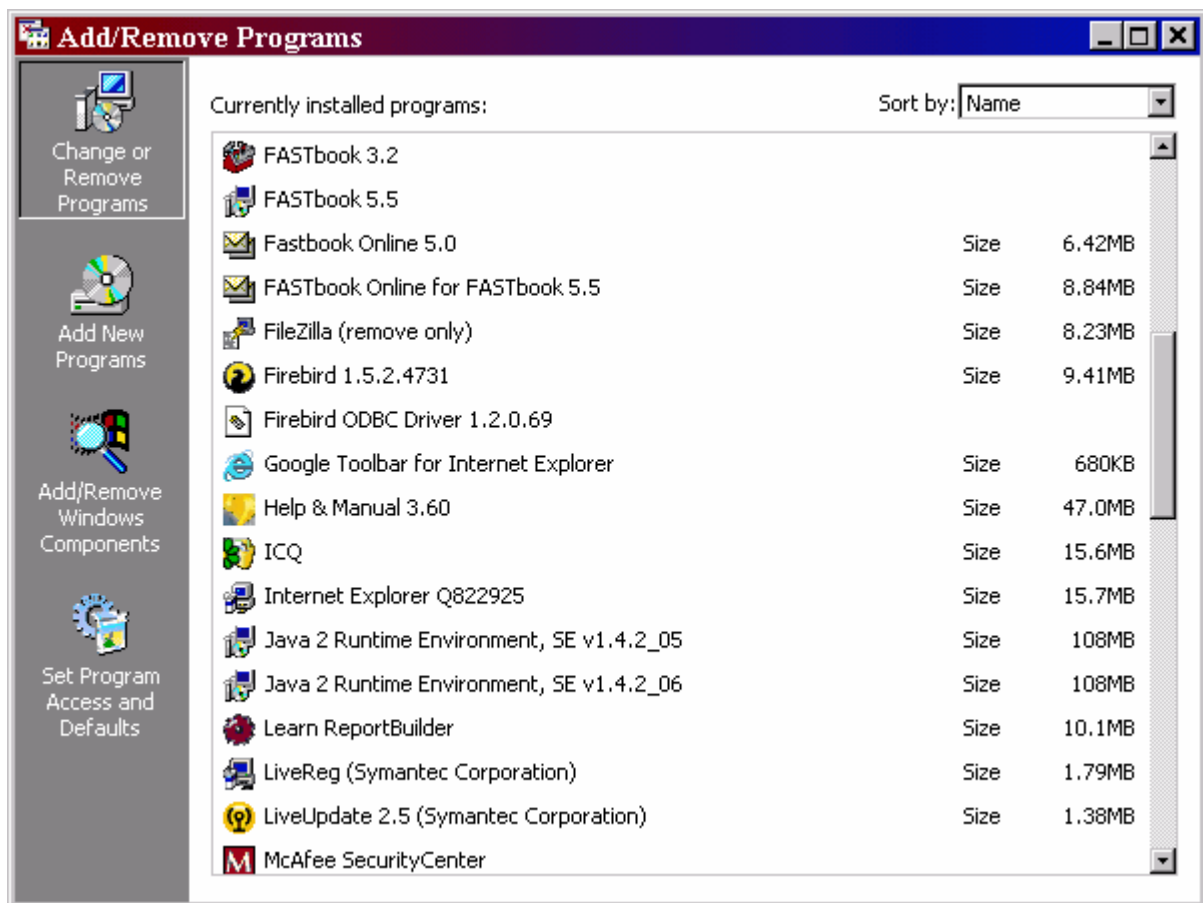
- Click on  Start
- Click on Settings
- Click on Control Panel



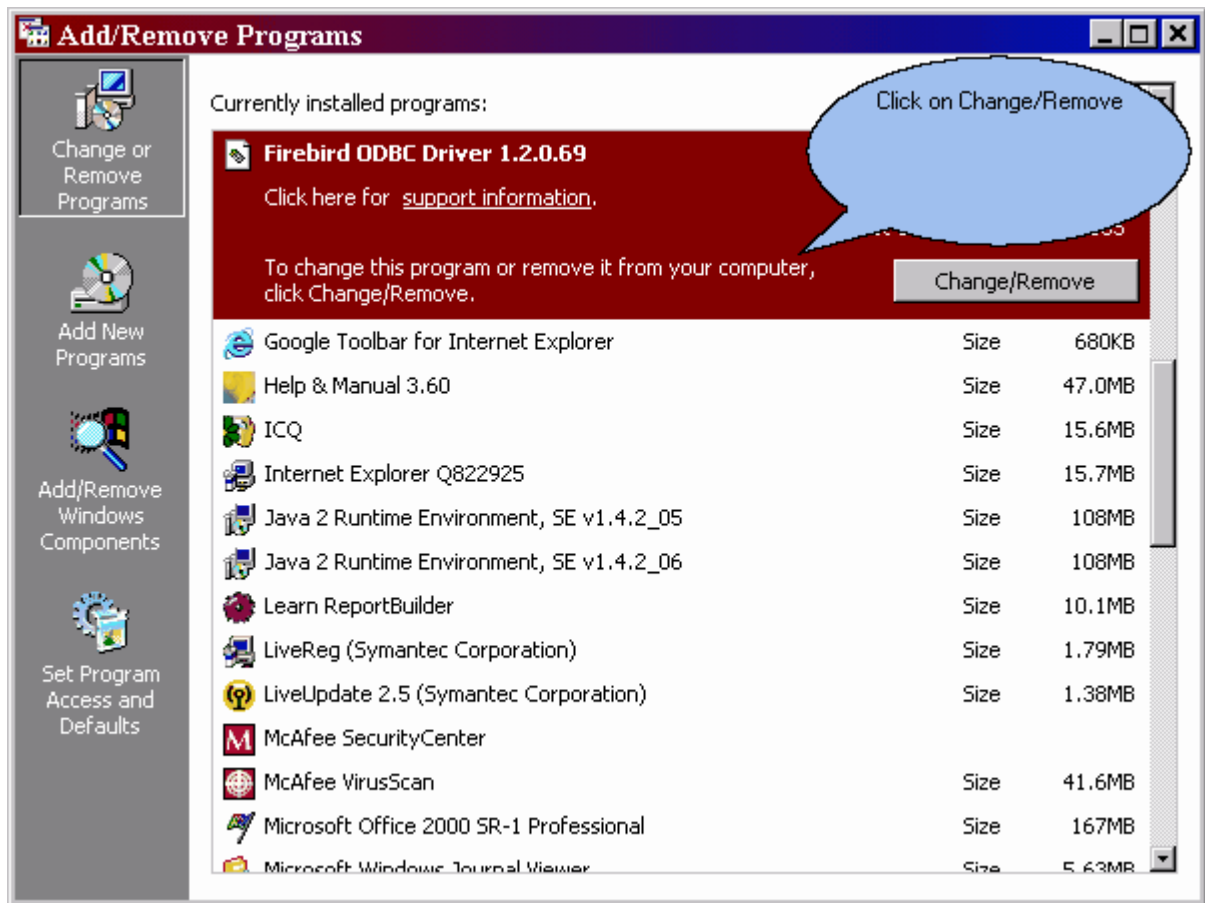
- The Control Panel window appears
- Click on Add/Remove Programs



- The Add/Remove Programs window appears
- Scroll down thru window until locate Firebird ODBC Driver 1.2.0.69

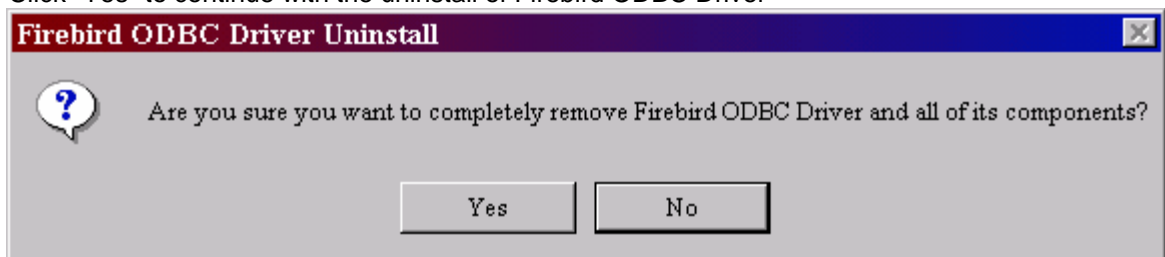


- Click on Firebird ODBC Driver 1.2.0.69 - Change/Remove box appears
- Click on Change/Remove



The Firebird ODBC Driver Uninstall window appears

- Click "Yes" to continue with the uninstall of Firebird ODBC Driver



The Firebird ODBC Driver Uninstall window appears

- Click "OK" to uninstall Fastbook 5.5



- To uninstall Firebird ODBC Driver on another local workstation - repeat the same process.

**FASTbook 5.5**

# **Chapter**



**21**

Final Thoughts

## 21 Final Thoughts

### 21.1 No such thing as a perfect manual

We at Event Software hope that you will find the new manual and help file useful. Please forgive us if the manual is not perfect; as you know, manuals are usually out-of-date by the time you receive them. However, if you do find a problem, please let us know and we will fix it.

Event Software is in its 21st year; seven different versions of FASTbook and 6 manuals later, we are still producing a winner.

We have only our loyal customers to thank for our great success.

Event Software, the management, and the staff wish to thank you for your continued support.



