

Ordering Resources in Forms, Invoices, and Reports

Updated: November 30, 2016

You may prefer to have your resources listed in a certain order for an event in an invoice, report, or custom form (BEO, Event Sheet, etc). For example, you may prefer to have your menu listed in the order in which it will be served, rather than alphabetically. You are able to change the order in which resources are listed by editing the *rank* of the items.

To edit the rank of your resources:

1. On the event details page of your event or function, go to the resources tab and click on *Add/Edit/View Resources* to go to the Usage page for the event or function.

Note: In your account the resources tab may be named inventory.

The screenshot displays the Eventbooking software interface. At the top is a navigation bar with links: Home, Calendars, Sales, AddressBook, Resources, Invoicing, Reports, (Help Desk), (Sign out), and Linda Moyer. Below the navigation bar is the Eventbooking logo and a search bar. The main content area is divided into a sidebar on the left and a main panel on the right. The sidebar contains sections for 'Event Family' (listing events like '2016 EB Banquet', 'Meeting', 'Reception', 'Lunch', 'Breakfast', 'Ballroom Dancing') and 'Reports and Forms' (listing options like 'Filter Events', 'Contract', 'Estimate of Charges', 'Event Sheet', 'Resources by Event w GL', 'Show Advisory'). The main panel shows details for 'Lunch : Sub-Event (id=8224)'. It includes fields for 'Sub-Event Name' (Lunch), 'Parent Event' (2016 EB Banquet), 'Spaces Used' (Ballroom A), 'When' (1/12/2016 12:00 AM (Tue) - 1/13/2016 11:59 AM (Wed)), 'Status' (Confirmed), and 'Room Setup' (Buffet). There are also sections for 'Contacts', 'Sub-Event Attendance' (with a table showing Expected, Guaranteed, and Actual attendance), and 'Notes'. At the bottom of the main panel, there are tabs for 'Rental/Resources', 'Time Line', 'Spaces Used', 'Activities/Traces', 'Documents', and 'History'. The 'Rental/Resources' tab is active, showing a table of resources with columns for Subtotal, Discounts, Service Charges, Taxes, and Total. A button labeled '+Add/Edit/View Resources' is highlighted in the sidebar.

	Subtotal	Discounts	Service Charges	Taxes	Total
Rental	\$500.00	\$0.00	\$0.00	\$25.00	\$525.00
Food and Beverage	\$360.00	\$0.00	\$40.00	\$23.60	\$423.60
Furniture	\$14,018.00	\$0.00	\$0.00	\$0.00	\$14,018.00
Labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$14,878.00	\$0.00	\$40.00	\$48.60	\$14,966.60

2. Click *Edit* - the *Rank* field will not be visible unless you are in edit mode.

Event Family

09 Jan 2016

2016 EB Banquet12:00 PM -

11 Jan 2016

Meeting12:00 AM -

11 Jan 2016

Reception12:00 PM -

12 Jan 2016

Lunch12:00 AM -

13 Jan 2016

Breakfasts12:00 AM -

13 Jan 2016

Ballroom Dancing12:00 AM -

Not Available

Not Available

Invoices

+Create New Invoice

45-01

47-03

53-00

Sub-Event Detail

Lunch

Sub-Event - (id=8224)

Confirmed

1/12/2016 12:00 AM (Tue) -

1/13/2016 11:59 AM (Wed)

Lunch

+Add +Edit Printer-friendly Copy Resources...

Invoice	Item	Used Qty.	Price	Subtotal	Comment	Description
Rental/Ballrooms						
53-00	Ballroom A	1 day	\$500.00	\$500.00		Default
				\$500.00	Subtotal	
				\$25.00	Tax	
				\$525.00	Ballrooms Total	
Food and Beverage/Meals						
53-00	Cobb Salad	60 ea	\$0.00	\$0.00		Default
53-00	Chicken Dinner	45 ea	\$8.00	\$360.00	Fried Chicken	Custom
53-00	Spaghetti Dinner	25 ea	\$0.00	\$0.00		Default
53-00	Ice Cream Bar	70 ea	\$0.00	\$0.00		Default
				\$360.00	Subtotal	
				\$40.00	Service Charge	
				\$23.60	Tax	
				\$423.60	Meals Total	
Furniture/Tables						
53-00	4' round table	1000 day	\$14.00	\$14,000.00		Default
53-00	18" x 8' table	1 day	\$18.00	\$18.00		Default
				\$14,018.00	Subtotal	
				\$14,018.00	Tables Total	
Labor/Security						
53-00	Supervisor	5 hr	\$0.00	\$0.00	Need from 1400 - 1900	Default
				\$0.00	Subtotal	
				\$0.00	Security Total	
Totals:						
				\$14,878.00	Subtotal	
				\$40.00	Service Charge	
				\$48.60	Tax	
				\$14,966.60	Grand Total	

3. Add a ranking to each resource, keeping in mind how your form or invoice is structured. If your resources are in one list, you will need to rank all of your resources. If, however, your resources are grouped by Set or Category, you can rank within a particular set or category. You may rank in several ways:

- Rank each item:

Food and Beverage/Meals

53-00	1	Cobb Salad	60	ea	\$0.00	⊗
53-00	2	Chicken Dinner	45	ea	\$8.00	⊗
53-00	3	Spaghetti Dinner	25	ea	\$0.00	⊗
53-00	4	Ice Cream Bar	70	ea	\$0.00	⊗

- Rank by item type, e.g. all appetizers, all entrees, all desserts:

Food and Beverage/Meals							
53-00	1	Cobb Salad	60	ea	\$0.00	⊗	
53-00	2	Chicken Dinner	45	ea	\$8.00	⊗	
53-00	2	Spaghetti Dinner	25	ea	\$0.00	⊗	
53-00	3	Ice Cream Bar	70	ea	\$0.00	⊗	

- If you think you may be adding items in the future, you can skip numbers so that you can insert items into the rank order rather than renumbering everything:

Food and Beverage/Meals							
53-00	1	Cobb Salad	60	ea	\$0.00	⊗	
53-00	5	Chicken Dinner	45	ea	\$8.00	⊗	
53-00	5	Spaghetti Dinner	25	ea	\$0.00	⊗	
53-00	10	Ice Cream Bar	70	ea	\$0.00	⊗	

4. Click Save.

Event Family

09 Jan

2016 EB Banquet12:00 PM -

11 Jan

Meeting12:00 AM -

11 Jan

Reception12:00 PM -

12 Jan

Lunch12:00 AM -

13 Jan

Breakfasts:00 AM -

13 Jan

Ballroom Dancing9:00 AM -

Not Available

Not Available

Invoices

+Create New Invoice

45-01

47-03

53-00

Sub-Event Detail

Lunch

Sub-Event - (id=8224)

Confirmed

1/12/2016 12:00 AM (Tue) -

1/13/2016 11:59 AM (Wed)

Lunch

Save Cancel

Invoice	Rank	Item	Used Qty.	Price	Subtotal	C
Rental/Ballrooms						
53-00	0	Ballroom A	1	day	\$500.00	⊗
					\$500.00	St
					\$25.00	Ta
					\$525.00	Ba
Food and Beverage/Meals						
53-00	1	Cobb Salad	60	ea	\$0.00	⊗
53-00	5	Chicken Dinner	45	ea	\$8.00	⊗
53-00	5	Spaghetti Dinner	25	ea	\$0.00	⊗
53-00	10	Ice Cream Bar	70	ea	\$0.00	⊗
					\$360.00	St
					\$40.00	Se
					\$23.60	Ta
					\$423.60	M
Furniture/Tables						
53-00	0	4' round table	1000	day	\$14.00	⊗
53-00	0	18" x 8" table	1	day	\$18.00	⊗
					\$14,018.00	St
					\$14,018.00	Ta
Labor/Security						
53-00	0	Supervisor	5	hr	\$0.00	⊗
					\$0.00	St

5. Your changes will be reflected in your form, invoice, or report.



EventBooking Demo
Knoxville, TN
 John Plattilero: (865) 966-4900

Proposal 53-00

Bill To: EB & Company
 Attn: Bill Smith
 800-555-9876

Event: 2016 EB Banquet (id=8221)
 January 09, 2016 12:00 pm (Sat) - January 13, 2016 11:59 am
 (Wed)
 Lunch (id=8224)

P.O. Number	Date Issued	Terms	Due Date
	11/30/2016	Net 30	12/30/2016

Lunch (id=8224)

January 12, 2016 12:00 am (Tue) - January 13, 2016 11:59 am (Wed) Ballroom A

Description	Comment	Qty	Price	Subtotal
Rental				
Ballroom A		1 day	\$500.00	\$500.00
Food and Beverage				
Cobb Salad		60 ea	\$0.00	\$0.00
Chicken Dinner	Fried Chicken	45 ea	\$8.00	\$360.00
Spaghetti Dinner		25 ea	\$0.00	\$0.00
Ice Cream Bar		70 ea	\$0.00	\$0.00
Furniture				
4' round table		1000 day	\$14.00	\$14,000.00
18" x 8' table		1 day	\$18.00	\$18.00
Labor				
Supervisor	Need from 1400 - 1900	5 hr	\$0.00	\$0.00
Totals:				\$14,878.00

Invoice Totals: \$14,878.00
Discounts: \$0.00
Taxes: \$48.60
Service Charges: \$40.00
Grand Total: \$14,966.60
Amount Due: **\$14,966.60**