

Adding Resources to an Event

Updated: February 23, 2015

This document will walk you through:

- Selecting a Price List 2
- Setting Tax Exempt Status 4
- Navigating to an Event’s Resource Page..... 6
- Adding Resources to an Event 7
- Editing Resources on an Event 9
- Applying Multipliers to Resources on an Event 11

Selecting a Price List

1. From the event details page, click the **Inventory** tab.

Furious Furs : Event (id=1158416)

Event Name
Furious Furs

Where
 EB Beta Arena

When [Move](#) [View Calendar](#)
2/2/2015 8:00 AM - 11:59 PM (Mon)

Status
 Confirmed

Event Type
 Family Show

Fac Name
Not Set

Decision Date
Not Set

Spaces Used | Child Sub-Events | Notes | Time Line | **Inventory** | Activities | Documents | Journal | Messages

Sort By: Calendar Rank

Where	When	Status
<input checked="" type="radio"/> EB Beta Arena	2/2/2015 8:00 AM - 11:59 PM (Mon)	<input checked="" type="radio"/> Confirmed

2. Click the edit icon next to **Inventory Schedule**.

Not Set

Spaces Used | Child Sub-Events | Notes | Time Line | **Inventory** | Activities | Documents | Journal | Messages

Inventory Schedule
2013 Pricing Schedule

Tax Exempt
Not Set

[+Add/Edit/View Resources](#)

	Sub
<input checked="" type="checkbox"/> Event Services	\$9:
	\$9:

3. Select the price list you would like to use from the drop-down.
For more information on price lists, please refer to [the full article](#).
4. Click **Save**.

The screenshot shows a software interface with a top navigation bar containing tabs: Spaces Used, Child Sub-Events, Notes, Time Line, Inventory, Activities, Documents, Journal, and Message. Below the navigation bar, the 'Inventory Schedule' section is active, displaying a dropdown menu with '2013 Pricing Schedule' selected. The 'Save' button is highlighted with an orange box, and an orange arrow points from it to the 'Tax Exempt' checkbox. Below this, the 'Tax Exempt' checkbox is checked, and the text 'Not Set' is displayed. At the bottom, there is a table with a header row '+Add/Edit/View Resources' and a data row for 'Event Services' with a subtotal of 5926.

+Add/Edit/View Resources		Subto
<input checked="" type="checkbox"/> Event Services		5926
		5926

Setting Tax Exempt Status

1. From the event details page, click the **Inventory** tab.

Furious Furs : Event (id=1158416)

Event Name
Furious Furs

Where
 EB Beta Arena

When [Move](#) [View Calendar](#)
2/2/2015 8:00 AM - 11:59 PM (Mon)

Status
 Confirmed

Event Type
 Family Show

Fac Name
Not Set

Decision Date
Not Set

Spaces Used | Child Sub-Events | Notes | Time Line | **Inventory** | Activities | Documents | Journal | Message

Sort By: Calendar Rank

Where	When	Status
<input type="checkbox"/> EB Beta Arena	2/2/2015 8:00 AM - 11:59 PM (Mon)	<input type="radio"/> Confirmed

2. Click the edit icon next to **Tax Exempt**.

Not Set

Spaces Used | Child Sub-Events | Notes | Time Line | **Inventory** | Activities | Documents | Journal | Message

Inventory Schedule
2013 Pricing Schedule

Tax Exempt
Not Set

[+Add/Edit/View Resources](#)

	Sub
<input type="checkbox"/> Event Services	\$92
	\$92

3. Select *Yes* or *No* from the drop-down.
4. Click **Save**.

The screenshot shows a software interface with a horizontal menu bar at the top containing the following tabs: Spaces Used, Child Sub-Events, Notes, Time Line, Inventory, Activities, Documents, Journal, and Message. Below the menu bar, there is a section titled 'Inventory Schedule' with a sub-section '2013 Pricing Schedule'. Underneath, the 'Tax Exempt' status is shown as a dropdown menu with the text '-Tax Exempt-'. Below the dropdown are two buttons: 'Save' and 'Cancel'. An orange hand-drawn box highlights the dropdown menu and the 'Save' button, with an arrow pointing from the dropdown to the 'Save' button.

Navigating to an Event's Resource Page

1. From the event details page, click the **Inventory** tab.

Furious Furs : Event (id=1158416)

Event Name
Furious Furs

Where
 EB Beta Arena

When [Move](#) [View Calendar](#)
2/2/2015 8:00 AM - 11:59 PM (Mon)

Status
 Confirmed

Event Type
 Family Show

Fac Name
Not Set

Decision Date
Not Set

Not Set

Spaces Used | Child Sub-Events | Notes | Time Line | **Inventory** | Activities | Documents | Journal | Message

Sort By: Calendar Rank

Where	When	Status
<input type="checkbox"/> EB Beta Arena	2/2/2015 8:00 AM - 11:59 PM (Mon)	<input checked="" type="radio"/> Confirmed

2. Click **+Add/Edit/View Resources**.

Not Set

Spaces Used | Child Sub-Events | Notes | Time Line | **Inventory** | Activities | Documents | Journal | Message

Inventory Schedule
2013 Pricing Schedule

Tax Exempt
Not Set

+Add/Edit/View Resources

	Sub
<input type="checkbox"/> Event Services	\$92
	\$92

Adding Resources to an Event

1. Click +Add.

The screenshot shows the 'Furious Furs' event invoice. The '+Add' button is highlighted with an orange box. The invoice table is as follows:

Invoice	Item	Used Qty.	Price	Subtotal	Comment
	Event Services/Tables and Chairs				
	Folding Chair	926 ▲	dy \$1.00	\$926.00	
				\$926.00	Subtotal
				\$64.82	Tax
				\$990.82	Tables an
Totals:				\$926.00	Subtotal
				\$64.82	Tax
				\$990.82	Gr

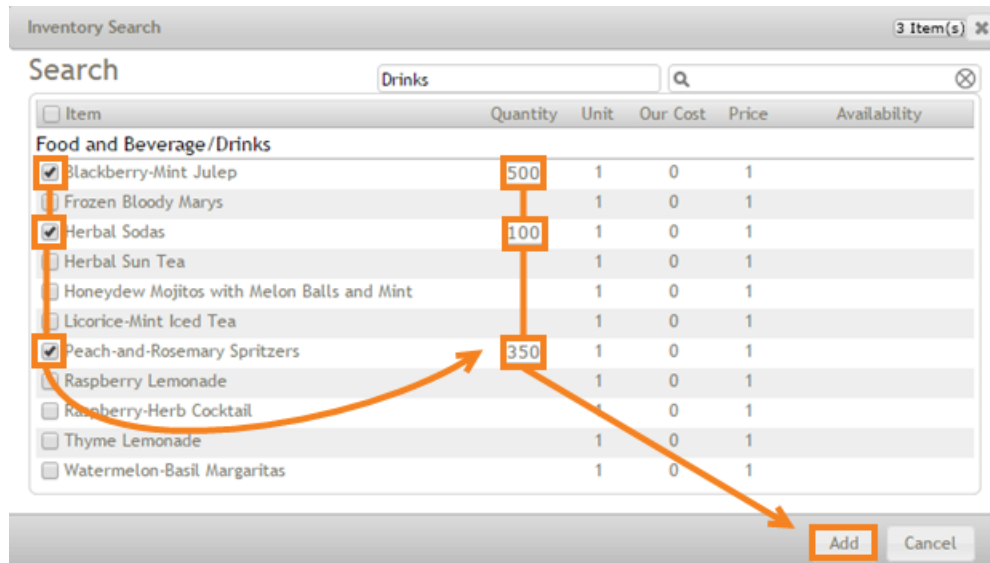
2. Optionally, filter the resources by selecting a set or category from the drop-down or using the search field.

The screenshot shows the 'Inventory Search' window. A search filter dropdown is open, showing categories like 'All Sets and Categories', 'Rental', 'Suites', and 'Food and Beverage'. The search results table is as follows:

Item	Cost	Price	Availability
Beer	0	1	
Hard Cider	0	1	
Wine	0	2	
Antipasto Kabobs	0	2	
Beer Dip	0	2	
Chocolate Chip Cheese Ball	0	2	
Cilantro Salsa with Coconut and Lime	0	2	
Corn Dip with Tomatoes and Basil	0	2	
Cranberry Chili Meatballs	0	2	
Herbed Yogurt Dip	1	0	2
Mozzarella Cheese Sticks	1	0	2
Mustard-Dill Tortellini Salad Skewers	1	0	2
Olive-and-Eggplant Dip	1	0	2
Parsley Pesto	1	0	2
Rosemary Bread	1	0	2

At the bottom of the window, there are 'Add' and 'Cancel' buttons.

3. Check the box next to any resource you want to add to the event.
4. Type the quantity of the resource you want to be added to the event.
5. Click **Add**.



Editing Resources on an Event

1. Click **+Edit**.

Furious Furs

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

Invoice	Item	Used Qty.	Price	Subtotal	Comment	Description
Food and Beverage/Drinks						
	Blackberry-Mint Julep	500	1	\$1.00	\$500.00	Default
	Herbal Sodas	100	1	\$1.00	\$100.00	Default
	Peach-and-Rosemary Spritz	350	1	\$1.00	\$350.00	Default
					\$950.00	Subtotal
					\$950.00	Drinks Total
Event Services/Tables and Chairs						
	Folding Chair	926	dy	\$1.00	\$926.00	Default
					\$926.00	Subtotal
					\$64.82	Tax
					\$990.82	Tables and Chairs Total
Totals:						
					\$1,876.00	Subtotal
					\$64.82	Tax
					\$1,940.82	Grand Total

2. You can edit the following information:

- **Rank:** the order in which resources will be listed. The higher the number, the lower the item will be on the list.
- **Used Qty:** the quantity of resource assigned to this event.
- **Price:** the price per unit of this resource. Note that this only affects the resource on this event.
- **Comment:** an additional comment on this resource item.
- **Description:** you can override the typical description of the resource.

Furious Furs

Save Cancel

Invoice	Rank	Item	Used Qty.	Price	Subtotal	Comment	Description
Food and Beverage/Drinks							
	0	Blackberry-Mint Julep	500	\$1.00	\$500.00		+Override
	0	Herbal Sodas	100	\$1.00	\$100.00		+Override
	0	Peach-and-Rosemary Spritz	350	\$1.00	\$350.00		+Override
					\$950.00	Subtotal	
					\$950.00	Drinks Total	
Event Services/Tables and Chairs							
	0	Folding Chair	926	\$1.00	\$926.00		+Override
					\$926.00	Subtotal	
					\$64.82	Tax	
					\$990.82	Tables and Chairs Total	
Totals:							
					\$1,876.00	Subtotal	
					\$64.82	Tax	
					\$1,940.82	Grand Total	

3. Click **Save**.

Furious Furs

Invoice	Rank	Item	Used Qty.	Price	Subtotal	Comment	Description
Food and Beverage/Drinks							
	0	Blackberry-Mint Julep	500	1	\$1.00	\$500.00	+Override
	0	Herbal Sodas	100	1	\$1.00	\$100.00	+Override
	0	Peach-and-Rosemary Spritz	350	1	\$1.00	\$350.00	+Override
					\$950.00	Subtotal	
					\$950.00	Drinks Total	
Event Services/Tables and Chairs							
	0	Folding Chair	926		\$1.00	\$926.00	+Override
					\$926.00	Subtotal	
					\$64.82	Tax	
					\$990.82	Tables and Chairs Total	
Totals:							
					\$1,876.00	Subtotal	
					\$64.82	Tax	
					\$1,940.82	Grand Total	

Applying Multipliers to Resources on an Event

1. Click the magnifying glass icon next to a resource category.

Furious Furs

Invoice	Rank	Item	Used Qty.	Price	Subtotal	Comment	Description
Food and Beverage/Drinks							
	0	Blackberry-Mint Julep	500	1	\$1.00	\$500.00	+Override
	0	Herbal Sodas	100	1	\$1.00	\$100.00	+Override
	0	Peach-and-Rosemary Spritz	350	1	\$1.00	\$350.00	+Override
						\$950.00	Subtotal
						\$950.00	Drinks Total
Event Services/Tables and Chairs							
	0	Folding Chair	926	1	\$1.00	\$926.00	+Override
						\$926.00	Subtotal
						\$64.82	Tax
						\$990.82	Tables and Chairs Total
Totals:						\$1,876.00	Subtotal
						\$64.82	Tax
						\$1,940.82	Grand Total

- 2. Select **Apply to All Resources** from the drop-down of any multiplier you want applied to this category.

You can also click **Edit** to edit the multiplier. For more information on multipliers, please see [the full article](#).

- 3. Click **Apply**.

Food and Beverage/Drinks

Changes made here apply to this event family only.

TAXES, DISCOUNTS, AND CHARGES	APPLIED TO	ACTIONS
Discount		
Company Discount (0%)	None	- No change - Edit
No Air Conditioning Discount (\$500.00)	None	- No change - Apply to All Resources Edit
Best Client Ever Discount (\$2,000.00)	None	- No change - Edit
Discount Group (10+10) (10%)	None	- No change - Edit
Service Charge A		
Gratuity (20%)	None	- No change - Edit
Service Charge B		
Svc Charge on Subtotal and Discounts (\$20.00)	None	- No change - Edit
Service Charge C		
Default Service Charge C (0%)	None	- No change - Edit
Service Charge (new) (18%)	None	- No change - Edit
Tax		
Default Tax (7%)	None	- No change - Edit

[+Add](#)

[Apply](#) [Close](#)

- 4. Click **OK**.

Food and Beverage/Drinks

Changes made here apply to this event family only.

TAXES, DISCOUNTS, AND CHARGES	APPLIED TO	ACTIONS
Discount		
Company Discount (0%)	All	- No change - Edit
No Air Conditioning Discount (\$500.00)	None	- No change - Edit
Best Client Ever Discount (\$2,000.00)	None	- No change - Edit
Discount Group (10+10) (10%)		- No change - Edit
Service Charge A		
Gratuity (20%)		- No change - Edit
Service Charge B		
Svc Charge on Subtotal and Discos		- No change - Edit
Service Charge C		
Default Service Charge C (0%)	None	- No change - Edit
Service Charge (new) (18%)	None	- No change - Edit
Tax		
Default Tax (7%)	None	- No change - Edit

[-Add](#)

Apply Close

Alert

! Changes have been applied

OK

- 5. Click **Close**.

Food and Beverage/Drinks

Changes made here apply to this event family only.

TAXES, DISCOUNTS, AND CHARGES	APPLIED TO	ACTIONS
Discount		
Company Discount (0%)	All	- No change - Edit
No Air Conditioning Discount (\$500.00)	None	- No change - Edit
Best Client Ever Discount (\$2,000.00)	None	- No change - Edit
Discount Group (10+10) (10%)	None	- No change - Edit
Service Charge A		
Gratuity (20%)	None	- No change - Edit
Service Charge B		
Svc Charge on Subtotal and Discounts (\$20.00)	None	- No change - Edit
Service Charge C		
Default Service Charge C (0%)	None	- No change - Edit
Service Charge (new) (18%)	None	- No change - Edit
Tax		
Default Tax (7%)	None	- No change - Edit

[+Add](#)

Apply Close