Eventective Essentials

Set your event business up for success.



Descargar en español

Télécharger en français

Eventective Overview



Market

Promote your business with a comprehensive profile and boost visibility in your area.

Prospect

Grow your business with Eventective requests, qualify prospects, and communicate efficiently all in one place.

Negotiate

Easily manage your contracts or proposals. E-sign and automate your funnel.





Book

Process online payments with our partners and manage your revenue.

Market: Set Up Your Profile

Update your Eventective profile to accurately represent your business and get noticed throughout your local area:

- Pricing
- Photos
- Availability Calendar
- Basic Info
- Event Spaces
- <u>Recommendations</u>
- <u>Users</u>
- Report: <u>Profile Performance</u>



O The Event Venue •

\$=% Pricing

3 Active Price Points

Add and edit your event pricing information. Pricing can be listed as perperson, per event, or per hour.

View Profile on Eventective

View your profile as published on Eventective.

Add, edit, remove or reorder the photos and videos shown on your profile.

Recommendations

1 Recommendation

View and respond to recommendations posted to your profile. Find how to get more recommendations here.

Pricing

Pricing helps prospects decide if your venue is a good fit for their event, which results in more qualified inquiries for you.

You set the price - per person, per hour or per event - and include any additional details: rental fees, food, beverages, or entertainment. You can even post a general range.

Pricing

+ Add Pricing

Banquet Package \$2,000 Per Event

Available for Weddings, Parties, N 50-250 Attendees

Wonderful package for da Food is extra.

Catering Pricing \$25-\$75 Per Person

Available for Weddings, Parties, N 0-250 Attendees Catering options for any e

Banquet Room R \$200 - \$400 Per Hour

Available for Weddings, Parties, M Flat Rate Room Rental - p week. Call us for details.

LEARN MORE ()

e Lupdated August 17, 2023 Meetings ay or evening events. Includes linens and service. Meetings event. Lupdated August 21, 2023 Meetings event. Lupdated December 2, 2021 Meetings rice varies depending on the time and day of ↓			
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	ental Meetings rice varies depending on the f	Updated December 2, 2021 time and day of	ピ ₪ ↑ ↓

Photos

Add photos to your profile to help prospects see themselves in your space. Here are a few tips:

- Aim for 8 to 15 high-quality photos.
- Add individual photos of each event space to give prospects a feel for which room will work best for their event.
- Show off any special features or amenities you offer.





Photos & Videos

le(s) here or click in this box to brows	se for files	
	Delete All î =	Add Video + 1

Availability Calendar

Display your Availability Calendar on your profile so prospects can see which days you're booked.

Mark specific or recurring dates as 'Not Available' for booked events, appointments, holidays, or closings.

Use our auto-respond feature to send messages for dates you're not available.



Calendar



Event Stages: Qualified

The Event Venue

	Wednesday	Thursday	Friday	Saturday			
	2	3	4 Independence Day	5			
	9	10 9:00 AM Venue tour	11	12			
	16 5:00 PM Jolene's Reunion	17	18	19 4:00 PM Jim's Corporate			
	23	24	25	26			
	30	31	Aug 1	2			
	\sim	Show availability	y on your public profil	e: ON ?			
	Show event spaces on calendar above: OFF						
oked (Complete	Other Items:	Appointment NOT	AVAILABLE Holiday			

?

Basic Info

Update your **Basic Info** section with a detailed description, venue type, contact information, website/social media links, amenities, details, and special features.

Basic Info					The Event Venue
Business Name *					
The Event Venue					
Business Type *					Ē
Venue				\sim	Edit the information displayed on your
					profile
Website		Max Capacity			
https://www.eventective.com/		200	~	^	
Venue Types *					
Banquet/Event Hall				\sim	
Description				¢	
This new facility is an ideal location fo doors to Flaherty Park with a covered amenities.	r your wedd patio area le	ing. The event center opens u ading to many gorgeous par	ip with glass k gardens and		
Scenic views provide perfect backdre Warm inviting recention area with 3(ops for spec)' brick firen	tacular photos lace			
Comfortable, spacious seating for 30	0 at 36" tab	les		_	

MENITIES



ETAILS

otal Meeting Room Space (Squar	re Feet)	Year Renovated	
	~ ^	2015	\sim
umber of Event/Function Spaces	6		
2	~ ^		
pecial Features			

Event Spaces

Provide additional details about your <u>event spaces</u>, including a description, amenities, layouts, photos/videos, special features, and more.

Event Spaces

+ Add Event Space

Chaska Room

Banquet Room Large banquet style space



Outdoor Ceremony Site

Outdoor Venue Open outdoor space for any gathering





Recommendations

View and respond to <u>recommendations</u> your business has received. Use the provided link to request recommendations from past clients.

Recommendations

Use this link to send your own recommendation request to clients.

https://www.eventective.com/grand-rapids-mi/doubletree-by-hilton-grand-rapids-airport-3937.html#recon

The Hilton makes a wedding great

Oct 14, 2011 - An Eventective User

The Grand Rapids Airport Hilton is an amazing place to have your wedding reception. The staff at are amazingly helpful, the choices that they have for the wedding day packages are perfect for anyone. They have Gold, Silver and Platinum packages that make it easier to have your day planned out for you. The packages give you a good level of savings over making the choices of food, drink, appetizers etc. The ballroom is a beautiful room that will make your day a very special one.

Oubletree by Hilton... •

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View and respond to recommendations your business has received. All recommendations and their responses are published to your profile.

Users

Add users to your Eventective account to give your whole team access, making it easier for your business to respond to event requests.

Users can:

- Update profile content.
- Communicate with and qualify prospects in your Inbox.
- Create and send contracts or proposals.
- Request and manage payments.

Manage I	Users
----------	-------

+ Add User

Active Users

Name/Email

Paula Tester PaulTest2@eventective.com

Old Test-email 5702545user@eventective.com



Role	Billing	Remove
Admin		<u>ا</u>
Admin		Ē

Report: Profile Performance

Navigate to your <u>Reports</u> to see how your Eventective profile is working for you. The <u>Profile</u> <u>Performance Report</u> will show visitor activity - including requests, views, clicks, and more.

My Eventective *** Reports**

Select Report	Select Period	Start Date	End Date
Profile Performance \sim	This Year \checkmark	1/1/2024	12/31/2024

Visitor Activity	Count	Description
Direct Referrals	182	Visitors contacting Bella Vita Farm, LLC specifi
Competitive Leads	3136	Business generated in your area
Profile Views	1336	Visitors to your profile
Website Clicks	146	Visitors we sent to your website
Facebook Clicks	3	Visitors we sent to your Facebook page
Instagram Clicks	7	Visitors we sent to your Instagram page
Phone Clicks	1	Visitors who clicked on your phone number

	Ē.	🖈 Run Report	🛃 Excel
ically			

Prospect: Grow Your Business

Utilize a variety of prospecting tools to expand your reach and grow your event business:

- Prospects
 - <u>Referrals vs. Leads</u>
 - External
 - Your Website
- <u>Stage funnel management</u>
- <u>Competitive Lead Market</u>
- Lead Filters
- <u>Response Templates</u>
- Inbox tools
- Reports: <u>Leads and Referrals</u>, <u>Response Time</u>

Prospects Overview

Prospects can be generated from the following:

- **Referrals:** Direct event requests from prospects who viewed your profile.
- Leads: Event opportunities in your area.
- External: Added manually via the 'Add an Event' feature.
- Your Website: Added via our website inquiry form.

nbox	+ <				Tou
Q Event ID, Date, Name, Email		Add an Event	aur Inhaul	×	
John Thomas		Duringer	Share	/ selecting the + icon.	Eve
Sat, Oct 26 @ The Event Venue Reunion 50 Guests		The Event Venue	Prospect	ement and prioritize business	Se
Prospect Other received 14d ago	49	Contact First Name	Contact Last Name	∌arn more about Tasks	You
Roy Williams		Contact Email	Contact Phone		
Sat, Sep 14 @ The Event Venue Party 30 Guests			()		
Qualified Other received 22d ago		Event Type	Event Date	ospective clients. Keep track of changes	Des
		~		its	
Sally Brooks		Event Name	# Attendees		
Sat, Sep 21 @ The Event Venue			× ^		
Wedding Ceremony + Reception 75 C	Buests	Description	0/2000 character max		
Booked Other received 32d ago					This
					11112

Event Information X e (First + Last) Event Date # Attendees he type of event 🔍 🗸 Your Phone (###) ###-#### Your Event tected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply Close Submit Powered by eventective

Prospects: Referrals vs. Leads

Referrals are direct event requests from prospects interested in your business.

- You can treat these requests as "hot inquiries." Calling them is best especially if they provided a phone number.
- If you don't hear back right away, we recommend following up 2-3 times via Eventective or by phone.

Leads are prospects planning events in your area and wanting to hear from businesses like yours.

- Since this is likely the first time a Lead has heard of your venue, we recommend sending them a personalized note through Eventective or emailing them directly.
- Access Leads in our competitive <u>Lead Market</u> with an <u>Eventective Subscription</u>.



Prospects: External

Add prospects to Eventective from external sources by navigating to your <u>Inbox</u> and selecting the + icon.

Fill in all your prospect's event details and click 'Save.' You can now utilize all your Inbox tools.

You can also add prospects manually in your <u>Events</u> list and <u>Calendar</u>.



tective Inbox Lea	d Market Events	Calendar	Menu 🔻
Moloomo to vo an Event	urlabovl	×	
955	Stage		y selecting the + icon.
Event Venue	Prospect	\sim	ement and prioritize business
act First Name	Contact Last Name		earn more about Tasks
act Email	Contact Phone		
Туре	()		ospective clients. Keep track of changes
~			: Agreements its
Name	# Attendees	~ ^	
iption	0/2000 char	acter max	

Prospects: Your Website

Prospects can also be captured directly from your website with an embedded or linked event inquiry form powered by Eventective.

Customize your inquiry form in <u>Settings > Inquiry</u> Form.

Once you have added the inquiry form to your website, any new event requests will appear in Eventective with their source marked as 'Website.'





Event Information

our Name (First + Last)	Event Date
ent Type	# Attendees
Select the type of event \checkmark	
our Email	Your Phone
	(###) ###-####
escribe Your Event	

X

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service app



Stages: Manage Your Funnel





Lost: The event will not take place with your services. Deleted: The event will be removed from all other stages and reports.

Booked

Complete

An agreement has been

The event has taken place, and all necessary payments have been received.

Additional Stages:

Lead Market

Leads are requests from people who are planning events in your area and want to hear from businesses like yours. Find them in our competitive Lead Market.

Select any Lead to view more details. If you'd like to pursue the Lead, select 'To Inbox' to move it to your Inbox. Not interested? Select 'Delete' to clear it from your view.

Lead Market

All Event Types	\sim	<u>Reset</u>
Teresa - Hamilton, OH 450 Budget: Under \$500, Ema	11, Wedding Rec iil & Phone provi	eption, 70 Gu ded
Sat, Sep 28, 2024 - Date F Haylie - Cincinnati, OH 45 Budget: Flexible, Email &	⁻ lexible 5227, Wedding C Phone provided	Ceremony + R
Sat, Sep 23, 2023 Jan - Hamilton, OH 45013,	Event, 50 Guest	S

Budget: Flexible, Email & Phone provided







Note: Leads are only accessible with an **Eventective Subscription**.

Lead Filters

LEARN MORE

Use <u>Lead Filters</u> to qualify your Leads and find ones that fit your business best.

Filter by location, budget, event types, event date, and more. You can also filter out Leads for dates you mark as 'Not Available' on your calendar.

Geography Range

Within 50 miles of my location

Capacity Range

Between 25 and 110 attendees

Date Range

All leads no matter the date

Event Types Included

Weddings:

Ceremony Only, Ceremony + Reception, Reception Only

Parties:

Party, Banquet, Reunion, Baby Shower, Bridal Shower, Bar/Bat Mitzvah, Quinceañera, Kids, Teens, Graduation, Over 21, Corporate Gathering, Holiday Party, Cocktail Reception, Memorial Service, Other

Meetings:

Conference, Corporate Retreat, Meeting, Seminar

Budget Ranges

Weddings:

All Budgets, including Flexible Budgets

Parties:

All Budgets, including Flexible Budgets

Meetings:

All Budgets, including Flexible Budgets

Edit	
Edit	Limit the scope of competitive leads received by defining your geographical area, event types, budget ranges, and more. These settings do not affect direct Referrals
Edit	× Disable Lead Market
Edit	

Edit

Response Templates

Respond to prospects quickly with <u>Templates</u>. You can:

- Customize your Templates to improve your response rate.
- Set an automatic response for dates you mark as 'Not Available' on your calendar.
- Use <u>Template Variables</u> to add details from your prospects like their name or event date as well as your business information.

Edit Template

	esponse
Insert Template	Variable -
emplate Message	(Learn about Variables)
Hi PLANNER_FIRS	ST_NAME,
Thank you for your you in? I look forwa	r interest in BUSINESS_NAME. Unforto ard to your reply.
All the best,	
CONTACT_FULL_N	AME
CONTACT_EMAIL	
ttachments (5 ma	x):
× <u>Delete</u> Canc	el

The Event Venue





Inbox

Your Inbox provides easy and efficient ways to connect with your prospects:

- <u>View and organize your prospects</u> at a glance.
- View any prospect's event details.
- Send a quick message right from Eventective, email, or call.
- Add notes.
- Set <u>tasks</u>.
- Manage <u>stages</u>.
- Edit and send <u>agreements</u>.
- Manage <u>payments</u>.





Inbox: Prospect Details

🖵 Messages 🔋 Deta	ils 📴 Agreement 🚯 Payments 🚈 Tasks	
	May 21, 2024	
	John Initial Inquiry 10:12 AM EDT Family reunion	
	ev The Event Venue Viewed the Referral	10:12 AM
	Addie 4:12 PM EDT Hi John!	
	Thank you for your interest in our venue. Unfortunately your request da 26, 2024 is taken. Is there another date I can interest you in?	te of Saturday, Octol
	I look forward to your reply.	
	All the best, Ellen	
	The Event Venue (207) 253-1653	
	Enter your reply here	





•••

Ö

Event Overview

Sat	No events
27 Sun	No events

John Thomas

- Click to View Email
- 📞 Click to View Phone

Prospect | Other



- # EF6P65KT
- 😫 Chaska, MN 55318
- A Received 2d ago (May 21, 2024)

Reports: Leads and Referrals, Response Time

Reports

The Event Venue

Select Report	Select Period	Start Date	End Date		
Response Time V	This Year \checkmark	1/1/2024	12/31/2024	🖈 Run Report	🛓 Excel

...

	Activity	value	Description		
	Referrals Received	138	Referrals sent to your inbox		
	Referrals Opened	112	Referrals that were clicked on and viewed		
	Open Rate 81%		Percent of referrals that were clicked and viewed		
	Avg Time to Open 43 ho		Average amount of time taken to click and view referrals		
Referrals	Referrals Responded To 0		Referrals that were responded to using Eventective messaging system		
	Response Rate 0%		Percent of referrals that received a message from your business		
	Avg Time to Respond	n/a	Average time in hours taken to send a message to referrals		
	Phone # Access Rate	77%	Percent of referrals with a phone number where phone number was accessed		
	Email Access Rate	78%	Percent of referrals where the email address was accessed		
	Leads Received	116	Competitive leads made available to your business		
	Leads Selected	3	Leads that were moved to your inbox		
	Selected Rate	3%	Percent of available leads that were moved to your inbox		
	Avg Time to Select	52 hours	Average amount of time taken to move a lead to your inbox		
Leads	Leads Responded To	0	Leads that were responded to using Eventective messaging system		
	Response Rate	0%	Percent of leads that received a message from your business		
	Avg Time to Respond	n/a	Average time in hours taken to send a message to leads		
	Phone # Access Rate	9%	Percent of leads with a phone number where phone number was accessed		
	Email Access Rate	100%	Percent of leads where the email address was accessed		

Navigate to your <u>Reports</u> to view data on your inquiries, response time, and more. We recommend using the <u>Leads and Referrals</u> <u>Report</u> along with the <u>Response</u> <u>Time Report</u> (*pictured*).

Negotiate: Generate Agreements

Create, send, and e-sign custom contracts or proposals:

- Edit the event details.
- Outline the event schedule and function details.
- Determine the <u>billable items</u>.
- Specify <u>Terms and Term Templates</u>.
- Add your <u>business logo</u>.
- <u>Send, review, and e-sign</u> the final agreement.
- <u>Duplicate an event</u> to re-create the original agreement details.

Agreements: Overview

In the Overview section, you'll see all the event details from the prospect's initial request, including the event name, event type, guest count, and event date. You can edit any of these details here. You can also identify the event coordinator.

Jane's Party (Se	p 27, 2024)				
Overview	Schedule	Payments	Terms	Contacts	
Event Name				Jane's Party	
Event Type				Party	_
Total Guests				100	
Event Date				9/27/2024	1
Event End (op	tional)			Select an end date for this event	
Event Coordir	nator			Paula Tester	_

Agreements: Schedule and Functions

Edit each function, if applicable. Functions are separate parts of an event. Set start and end times, identify the function space, and define the setup and breakdown times.

Examples:

- Holiday Party (event) with a Cocktail Hour (function) and a Dinner Party (function)
- Family Reunion (event and function)

Jane's Party (S	ep 27, 2024)							
Overview	Schedule	Payments	Terms	Contacts				
Function			Jane's Party					
Guests			100					~ ^
Starts			9/27/2024 8:0	0 PM			All day	
Ends			9/28/2024 12:0	MA 00				
Space			Chaska Room	×				
Setup			One hour befor	re (-1h)		~	9/27/2024 7:00 PM	: •
Breakdown			One hour after	(1h)	, ,	~	9/28/2024 1:00 AM	: •

Agreements: Billable Items

Once the event details are set, you can use Manage Items to outline the event costs.

Function: Ellen's Holiday Party 8 100 Dec 19, 2024 4:00 PM-8:00 PM (Setup at 3:00PM, Breakdown until 9:00PM) Billable Items ^ Room Rental (1 item) \$250/unit Tax: \$0.00 4 Hour Rental 4 units Setup and Breakdown are complimentary ^ Food & Beverage (2 items) Plated Dinner 100 units \$75/unit Tax: \$600.00 Chicken or Beef Option Open Bar \$2500/unit Tax: \$250.00 1 unit Open Bar for 100, 4 Hours ^ Rentals & Service Personnel (1 item) Wait Staff 4 units \$500/unit Tax: \$160.00 3 Servers, 1 Bartender ^ Fees & Gratuities (1 item) \$2800/unit Tax: \$0.00 Auto Gratuity 1 unit 20% Auto Gratuity Subtotal \$15,800.00 Tax \$1,010.00

Entire Venue

\$1,000.00 \$1,000.00 \$10,850.00 \$8,100.00 \$2,750.00 \$2,160.00 \$2,160.00 \$2,800.00 \$2,800.00

Total \$16,810.00

Agreements: Item Categories and Billable Items

The default Item Categories include: Room Rentals, Food & Beverages, Rentals & Service Personnel, and Fees & Gratuities. These Categories are customizable in <u>Settings > Manage Items</u>. You can:

- Add or remove Item Categories.
- Edit the labels used for each Item Category.
- Control the order Categories appear in the dropdown and on your agreements.

Add Item Category

• Create default billable items within each Category.

Item Category	Status	
Room Rental	Active	
Food & Beverage	Active	
Rentals & Service Personnel	Active	
Fees & Gratuities	Active	

Manage Item Categories



Example: Item Categories and Billable Items

Edit Item Type

tem	Туре		Active	Active						
Roo	m Rental							YES		
)EF,	AULT ITEMS	6							Add	Default 🔂
tem	Name			Instru	ction	S		Default Price		
lose	Ballroom			4-Hou	r Re	ntal		\$2,160.00		CÒ
/lag	nolia Room			4-Hou	r Re	ntal		\$864.00		
	Item Nan Magnolia Instructi 4-Hour R	ne Room ons ental								
	Quantity	Quantity		Price		Taxable?	Tax Rate			
	4.0	~	^	\$200.00	~	^	YES	8.00	~	~
	Total							\$	864	.00

L	E	A	R	Ν

The Room Rental (Category) includes the following default billable items:

• The Rose Ballroom for \$2,160 • The Magnolia Room for \$864

These items will be selectable in the agreement builder so you can avoid re-entering common charges.



Agreements: Terms and Conditions

Add any <u>agreement terms</u>, such as cancellation and refund policies, insurance and liability conditions, and security and safety requirements. Use <u>Templates</u> and Template Variables to reuse common terms for each agreement. Add *Initial Here* fields to any terms.

Overview	Schedule	Payments	Terms	Contacts		
Template (or	otional)					Ind
Cancellatio	n			\sim	Edit Templates	
Title						Jan
Cancellatio	n					liab
Body						loss con
B I	<u>U</u>					of th
Jane Smith election to Jane Smith use of the incurred b	n may cancel this The Event Venue n will be charged Facility. For canc y The Event Venu	Agreement at any e, at no cost to Jane 100% of the deposi ellations 28 days p e.	time up to 30 da Smith. If Jane S t paid and any e rior to Event Dat	nys prior to the Friday, Septem mith shall elect to cancel this a xpenses incurred in good faith te, Jane Smith will be charged 1	ber 27, 2024 by providing written notice of such agreement between 29 days prior to the Event Date, by The Event Venue in preparation for Jane Smith's 100% of the Rental Costs and deposit any expenses	Initia



lemnification

e Smith shall indemnify, defend and save harmless The Event Venue, ainst any and all loss, cost (including attorneys' fees), damage, expens ility under workers' compensation laws) in connection with claims, judg ses, suits, administrative proceedings, arising out of any act or neglect tractors, Lessees, invitees, representatives, in, on or about the Facility his Agreement.

al here:

Agreements: Business Logo

To further customize your agreement, upload your business logo. Navigate to <u>Settings ></u> <u>Business Logo</u>. Click the Browse button and upload the logo file. Your logo will now be added to the top of any agreement you send your prospects.

The Event

Jane's Party

Client Contact

Jane Smith test@testing.com Provider Contact

The Event Venue Paula Tester 100 Main St. Chaska, MN 55318

Updated 8/29/2024

Fri. Sep. 27, 2024

Agreements: Payment Schedule

Manage your payment schedule. For any payment, you can include the following:

- Description (e.g. deposit, initial payment)
- Status (unpaid or paid)
- Due date (specific date or certain number of days before the event)
- Amount due

Deposit	Due: Jul 29, 2024	\$5,000.00	C Edit Payment
First payment	Due: Aug 28, 2024	\$3,000.00	🖒 Edit Payment 🗎
Final payment	Due: Sep 12, 2024	\$2,725.00	🕑 Edit Payment 间
			Remaining: \$0.00

Agreements: Preview and Send

The Agreements tab will automatically generate a PDF of the agreement. Select Download to save a copy to your device or click Send Agreement to email it to your prospect – with or without requiring a signature. Your prospect will be notified they have an agreement to view. When the prospect views and signs the agreement, you will be notified.

Jane's Party	QUALIFIED -	Latest	Changes						
🖵 Messages 🔋 🗎 De	tails Dr Agreement							Down	nloa
	Latest Changes	К	< >	> 1 of 2	2 ⊖ ⊕	112% 🗸			
		٥							
		Д	THE	EVENT VENUE					
			Jai	ne's Part	:y				F
			Clie	nt Contact			Provider Contact		
			Jane testi	Smith ng@testing.cor	n		Paula Tester The Event Venue		
							207-253-1653 100 Main St. Chaska, MN 553	318	
			Jan	e's Party					
			Star Ends Gues	ts F sts 1	Fri. Sep. 27, 202 Sat. Sep. 28, 20 00	24 @ 8:00 PM)24 @ 12:00 A	1 AM	Setup begins at Teardown ends at	7:0 t 1:0
			4						



Sample Agreement

THE EVENT VEN	IUE			Updated 3/19/2024	
Jane's Pa	rty		F	ri. Sep. 27, 2024	Cancellatio
Client Contact lane Smith testing@testing.	com	Provider Contact Paula Tester The Event Venue			Cancellation N For cancellatio within 90 days
lane's Part	y	207-253-1653 100 Main St. Chaska, MN 55	318		Cancellation Pr All cancellatior date, and reser
Starts Ends Guests	Fri. Sep. 27, 2024 @ 8:00 PM Sat. Sep. 28, 2024 @ 12:00 A 100	м	Setup begins at 7:00 Teardown ends at 1:00	D PM) AM	Refund Proces Refunds for car calculated base
Room Rental					

Item	Quantity	Cost	Tax Rate	Total
4 hour rental	1	\$500.00	5%	\$525.00
			Room Rental Su	btotal: \$525.00

Food & Beverage

Item	Quantity	Cost	Tax Rate	Total
Buffet dinner	100	\$40.00	10 %	\$4,400.00
Open bar	1	\$3,000.00	10 %	\$3,300.00
		Food 8	Beverage Subto	tal: \$7,700.00

Rentals & Service Personnel

Item	Quantity	Cost	Tax Rate	Total
Wait staff and bartenders	5	\$500.00	0 %	\$2,500.00
		Rentals & Servic	e Personnel Subt	otal: \$2,500.00

Jane's Party Subtotal: \$10,725.00

Function	Subtotal
Jane's Party	\$10,725.00
Grand Total	\$10,725.00

Payment Schedule

Payment	Due	Amount
Deposit	07/29/2024	\$5,000.00
First payment	08/28/2024	\$3,000.00
Final payment	09/12/2024	\$2,725.00
Total		\$10,725.00

ion Policy

Votice: ons made 90 or more before the scheduled event date, there will be no cancellation fee. Cancellations made s of the event will be subject to a cancellation fee of 10% of the total event cost.

rocedure:

SS:

Client Signature



The event details, schedule, billable items, and terms will all be displayed in the final agreement.



ns must be submitted in writing via email to phertlein@eventective.com. Please include your event name, rvation details in your cancellation request.

incellations will be processed within 30 days of receiving the cancellation notice. The refund amount will be sed on the cancellation policy outlined above.



Duplicate an Event

To make your event booking process easier, you can duplicate an existing event. As long as the event is marked as Qualified, Tentative, Booked, or Complete, you can duplicate the event.

Here's how:

- From your <u>Eventective Inbox</u>, select the event you would like to duplicate and click the menu icon in the upper righthand corner, next to Event Overview.
- Then select Duplicate this Event.
- Fill in the duplicate event details and save.

Event

16 Wed

17 Thu

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C



Book: Manage Payments

Manage online payments and track revenue.

- <u>Connect your Eventective account</u> to Stripe or Square.
- Request and manage <u>offline payments</u>.
- Determine a <u>payment schedule</u>.
- <u>Request payments, set reminders, send receipts</u>, and <u>view payment history</u>.
- View your <u>upcoming events and expected revenue</u>.
- Utilize the <u>Stage Summary</u> and <u>Payments Reports</u>.

Payments: Set Up

Connect your Eventective account to an existing Stripe or Square account or create a new one.

If you have an existing Stripe or Square account, you can follow these steps:

- Click <u>Settings > Accept Customer</u> <u>Payments</u>.
- Select the 'Connect to Stripe or Square' button and complete your account connection.

<u>ب</u>
Lead Market Filters Qualify competitive Leads based on location, budget, event type, etc.
Personance Templates
Response remptates
Save time by creating templates to respond to inquiries quickly
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Link to Your Profile
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Link to Your Profile Embed a link to your Eventective Profile on your website.
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Settings



The Event Venue



Hide Profile on Eventective

Temporarily hide profile from users on Eventective

Delete Profile

Permanently delete your profile on Eventective

Payments: Request Via Our Payment Partners

Once your Eventective account is connected to Stripe or Square, you can request and accept online payments. The payment schedule will match the one you set up in your agreement.

Received:	\$0.00	ſ
Outstanding:	\$10,725.00	
Total:	\$10,725.00	
Deposit Due Monday 7/29/2024		
First payment Due Wednesday 8/28/20	024	
Final payment Due Thursday 9/12/2024	4	



Payments: Request Offline

If you are not connected to Stripe or Square, you can request offline payments in the Payments tab. This action emails your client with a payment amount, due date, and any optional instructions.



Payments: Reminders for Online Payments

Schedule email reminders up to two weeks before any payment is due. Reminders link your clients directly to the payment platform of your choice. This cannot be done for offline payments.

Payment Name		
Event Deposit		
Amount:		Due Date:
\$1,000.00	~ ^	10/15/2024



Payments: Receipts for Offline Payments

For offline payments, you can send payment receipts when marking the payment as paid - or anytime after the fact. This action will send receipts to your clients via email.

Nina's Corpora	ate Party - TEST	QUALIFIED -	
🖵 Messages 🛛 🗎 Det	tails 🕞 Agreement 📑 🛚	Payments ≅ Tasks	
Received: Outstanding:	\$500.00 \$500.00		
Total:	\$1,000.00	Edit Payment Payment Name: Second Deposit	×
Initial Deposit PAID Paid Friday 1/17/202	5	Amount: \$250.00 \v \landarian	Due Date: 1/24/2025
Second Deposit Due Friday 1/24/202	5	Notes (internal use):	1/31/2025
Final Payment Due Friday 1/31/2025	5	Immediately send payment re	eceipt
			opulle

	Connect to stripe
	Connect to 🕒 Square
	Add Payment
	Send Receipt ····
	\$500.00
	Request Payment
	\$250.00
	Request Payment •••
K	\$250.00

Payments: History

Payment history will also be stored in this section for your records.

Steve's R	eunion	BOOKED -		
🖵 Messages	🖹 Details	🕒 Agreement	B Payments	¥∃ Tasks
Received:		\$2,000.00		
Outstanding:	:	\$5,200.00		
Total:		\$7,200.00		
Deposit PA	ID			
Paid Wednes	sday 3/6/20	24 via Stripe		
∧ Payment I	Request His	tory		
Sent: Tues	day 2/27/202	4		
Sent: Tues	day 2/27/202	4		
Sent: Tues	day 2/27/202	4		

Final payment

Due Wednesday 7/24/2024

Stripe Dashboard

Add Payment

•••

\$2,000.00

Viewed: Tuesday 2/27/2024

Viewed: Tuesday 2/27/2024

Viewed: Tuesday 2/27/2024

🔤 Request Payment 🛛 🚥

\$5,200.00

Events and Expected Revenue

Upcoming events can be viewed in your <u>Events</u> section. Additionally, you can view the revenue your business is expected to generate from these events, along with overdue payments. Events can be filtered by Stages and date ranges to help prioritize your bookings.

ualified, Tentative, B	ooked ~ 3/20/202	+ 3/20/2025	Add Event
Addie's Reunic	on	April's Banquet	
The Event Venue Fri. Jun. 14, 2024 40 guests	2	The Event Venue Fri. Jul. 12, 2024 100 guests	
Qualified	\$6,330.00	Qualified	
	Ellen's Wedding Ceremo Reception	ony +	Jane's Party
	The Event Venue		The Event Ven
	Sat. Sep. 21, 2024		Fri. Sep. 27, 20
	100 guests	OVERDUE	100 guests
	Tentative	\$17,550.00	Qualified
	Tentative	\$17,550.00	Qualifie

The Event Venue



Reports: Stage Summary

Reports

Select Report	Select Period	Start Date	End Date	
Stage Summary 🗸 🗸	This Year \checkmark	1/1/2024	12/31/2024	🛪 Run Report

• Qualified

Events (3)	Date	Attendees	Expected Revenue	Тах	Payments Received	Payments Outstanding	Refunds
Addie's Reunion	Fri, Jun 14, 2024	40	\$6,330.00	\$330.00	\$0.00	\$0.00	\$0.00
April's Banquet	Fri, Jul 12, 2024	100	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jane's Party	Fri, Sep 27, 2024	100	\$10,725.00	\$725.00	\$0.00	\$10,725.00	\$0.00
		Totals:	\$17,055.00	\$1,055.00	\$0.00	\$10,725.00	\$0.00

Tentative

Events (1)	Date	Attendees	Expected Revenue	Тах	Payments Received	Payments Outstanding	Refunds
Ellen's Wedding Ceremony + Reception	Sat, Sep 21, 2024	100	\$17,550.00	\$550.00	\$0.00	\$17,550.00	\$0.00
		Totals:	\$17,550.00	\$550.00	\$0.00	\$17,550.00	\$0.00

Booked

Events (1)	Date	Attendees	Expected Revenue	Тах	Payments Received	Payments Outstanding	Refunds
Steve's Reunion	Fri, Aug 23, 2024	50	\$7,200.00	\$200.00	\$2,000.00	\$5,200.00	\$0.00
		Totals:	\$7,200.00	\$200.00	\$2,000.00	\$5,200.00	\$0.00

The Event Venue

🛓 Excel

Easily report on your sales funnel with the <u>Stage Summary Report</u>. View breakdowns of each event by Stage and key details: event name, date, attendees, expected revenue, tax, payments received, payments outstanding, and refunds.

Reports: Payments

Reports

Select Report		Select Period		Start Date	End Date		
Payments	\sim	This Year	~	1/1/2025	12/31/2025	🛧 Run Report	🛓 Excel

Payments Received

Event	Payment	Paid	Source	Amount
Elaine's Party	Booking Deposit	Jan 3, 2025		\$100.00
Elaine's Party	Partial Payment	Jan 3, 2025		\$275.00
			Total Received	\$375.00

Payments Due

Event	Payment	Due	Last Request Next Request	Amount
Jerry's Meeting	January Rental Fees	Jan 1, 2025	Jan 1, 2025	\$675.00
Neumann's Party	Security Deposit	Jan 3, 2025	Jan 3, 2025	\$250.00
Elaine's Party	Balance	Jan 3, 2025		\$100.00
Elaine's Party	Security Deposit	Jan 3, 2025		\$250.00
Cosmo's Party	Security Deposit	Jan 5, 2025	Dec 29, 2024	\$400.00
Delores's Baby Shower	Security Deposit	Jan 5, 2025	Dec 29, 2024	\$400.00

Grand Event Venue

The <u>Payments Report</u> displays upcoming and completed payments occurring within any specified timeframe.

Questions?

We're here to help!

eventective.com sales@eventective.com 207.253.1653



