



# Recover Cost and Invoice with EventEssentials

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# Why are we here today?



# Agenda

- » Log into your account, or the Dude University Account
- » Create a test Schedule
- » Charge Types and Organization Types
- » Manual Invoicing
- » Posting a Payment
- » Reports
- » Questions

# Create a Schedule

## » Click the New Schedule tab

- » Click Normal Schedule
- » Set the Status to Approved (uncheck the Notify boxes)
- » Choose the Location Chris Shirley High School
- » Add at least 10 dates
- » Fill the rest of the fields with anything
- » Mark the Schedule as Pending or Active
- » Remember to click the Save button to create the Schedule

**Schedule ID** NEW

**Status** Approved ▾

Notify Booked By

Notify Contact Person

**Schedule State?** Inactive

**Event Title** Invoicing is fun! ⓘ

**Event Description** I love invoicing so much I do it as a free-time hobby. ⌵

Inactive Schedule

Pending Schedule?  Add/Update Pending Reason

Pending Expiration Date  ⓘ

Activate Schedule?

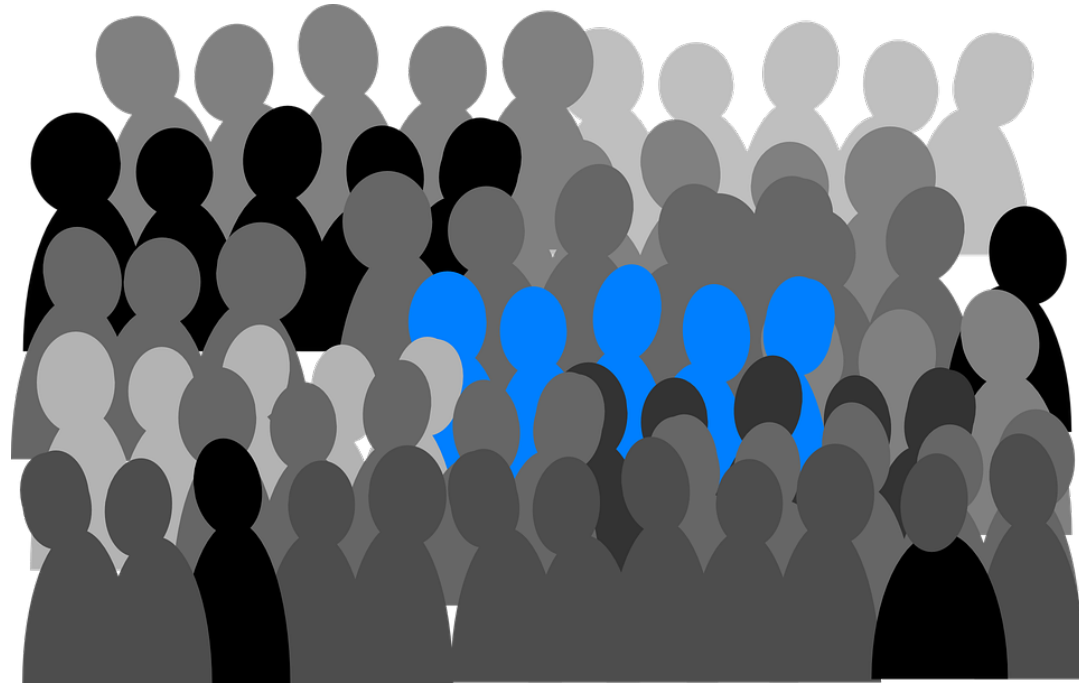
Save Reset

# Charge Types

- » Charge Types are labels for individual line items
  - » Hourly Charge Types are typically for services
  - » Event Charge Types are typically for rental fees
- » You can apply the charge to the Room or the Event
  - » Typically, charge services to the event
  - » Typically, charge rental fees to the room
- » Pro tips
  - » Include your cost-per-unit in the Charge Description
  - » Create separate Charge Types for any fees you waive
  - » Use the Minimum Hours feature to avoid loss on smaller events

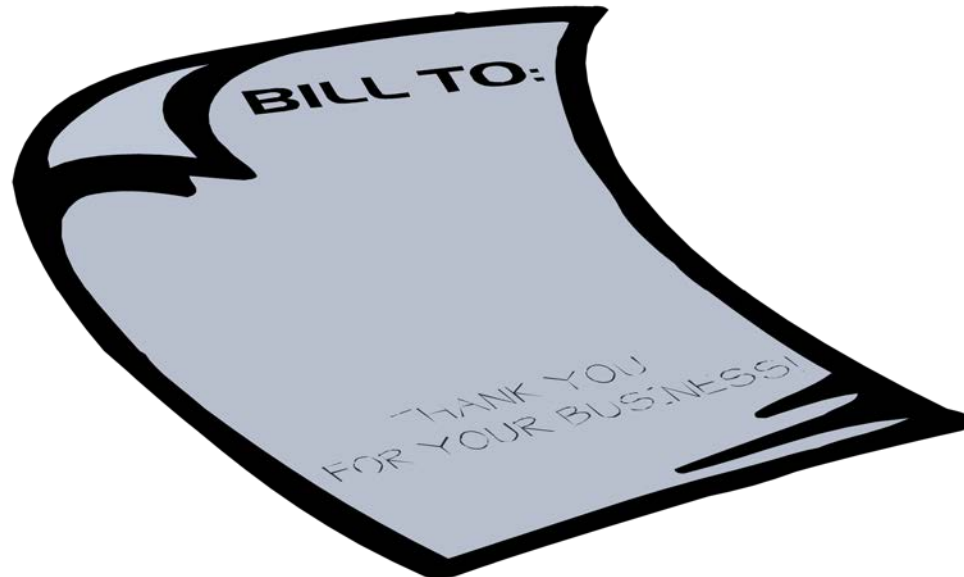
# Organization Types

- » Divide your organizations into different classes
  - » More detailed reporting
  - » Easier invoicing
  - » Required for Fee Tables



# Manual Invoicing

- » Invoicing in FSDirect can be totally manual or partially automated (Fee Tables)
  - » Manual invoices have the advantage of additional flexibility
  - » Manual invoices require very little set up







SAN DIEGO  
MARCH 18-21  
**2018**

SAVE THE DATE!

**DON'T FORGET!**

**IN THE APP:**

**SESSION SURVEYS  
& REQUEST MORE INFO**