



ORDERSTREAM PRO
BUSINESS MANAGER

By VORTEX BUSINESS SOFTWARE



ORDERSTREAM PRO
BUSINESS MANAGER

Event Management

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Introduction

The purpose of this document is to describe the Event Management feature of OrderStream Pro.

OrderStream Pro has been specifically designed as an enterprise wide order management system for promotional product distributors.

Promotional products are very much part of special events held by organizations and corporations. Events are attended by select groups of people that have some affinity to the organization or corporation. Good examples of such situations include membership events for association and corporate events for employees or customers. Promotional products are used to cement the relationship between people attending the event and the association or corporation sponsoring the event.

A significant portion of promotional products distributed are related to specific events. As such a basic event management feature represents a logical extension of an order management system. Since many events are recurring on a periodic basis, having a full record of events and orders associated with events, is a valuable resource for marketing merchandise and managing events.

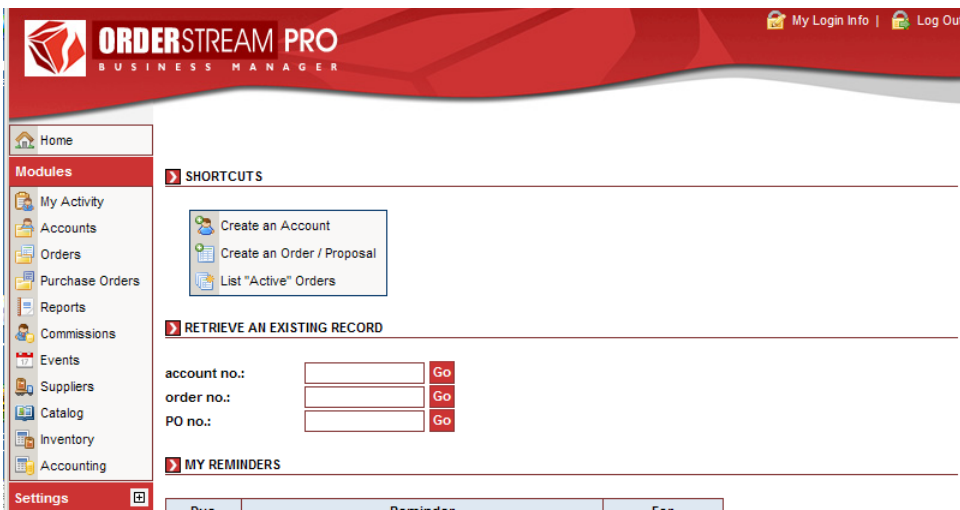
The key features of OrderStream Pro's Event Management system includes:

- Identifying the events for which the distributor is supplying or selling promotional products. Event information includes, name, location, dates, number of attendees, etc.
- Identifying the contact information of the host of the event. The host is typically an association or corporation.
- Associating one or more orders for merchandise that are related to the event. Orders vary with the nature of each event. Knowing the characteristics of an event when analyzing orders provides a valuable context.
- Identifying the representatives in the field associated with an event.

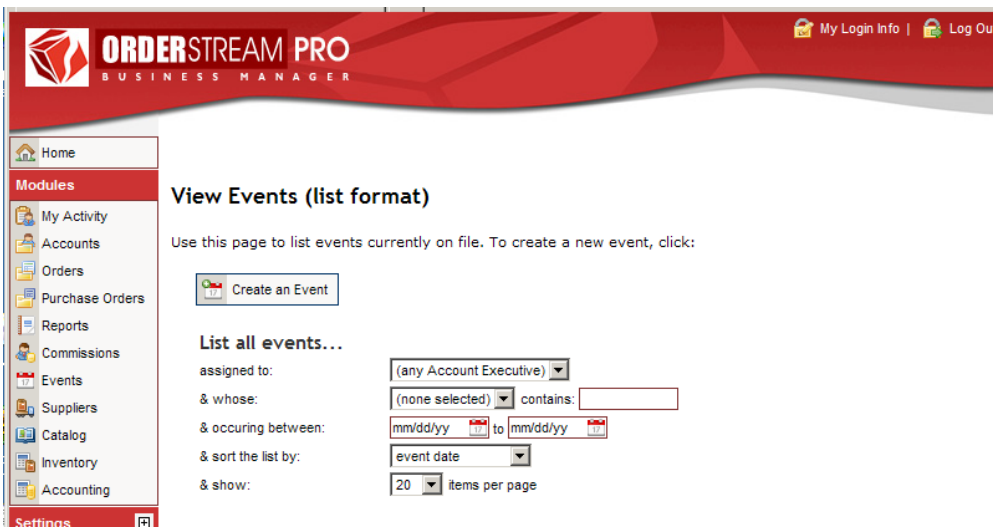
The following pages contain basic instruction regarding the use of the Event Management Feature of OrderStream Pro.

Main Menu

To access the Event Management module of OrderStream Pro (OSP) login to OSP and then click on “Events” on the main menu.



The main menu for the Event Management Events is show below.



There are two main functions on the main menu:

Create an Event which is described below

List all events which enables the user to create a list of events using various criteria as follows:

- Events can be listed by account executive. Each list is associated with an account executive (as are all orders).
- By a specific attribute of the event in terms of
 - Event Name
 - Event Number
 - Client Name
- Event Date or date range.
- The list can be sorted by one of the following criteria:
 - Event Date
 - Event Number
 - Client Name
 - Account Executive
- The last option allows the user to specify the number of events to list on a web page

Below is a list of events in list format. Events can also be displayed in calendar format – see below:

View Events (list format)

Use this page to list events currently on file. To create a new event, click:

[Create an Event](#)

2 matches found

Legend: view event details delete this event

Event no.	Event	Date	Account Executive	Actions
4	American Cancer Society Fund Raiser	11/21/10	Alfons AE Van Wijk	
2	US Olympic Event	11/30/10	Alfons AE Van Wijk	

View Events (calendar format)

Use this page to list events currently on file. To create a **new** event, click:

[Create an Event](#)

Month: Year:

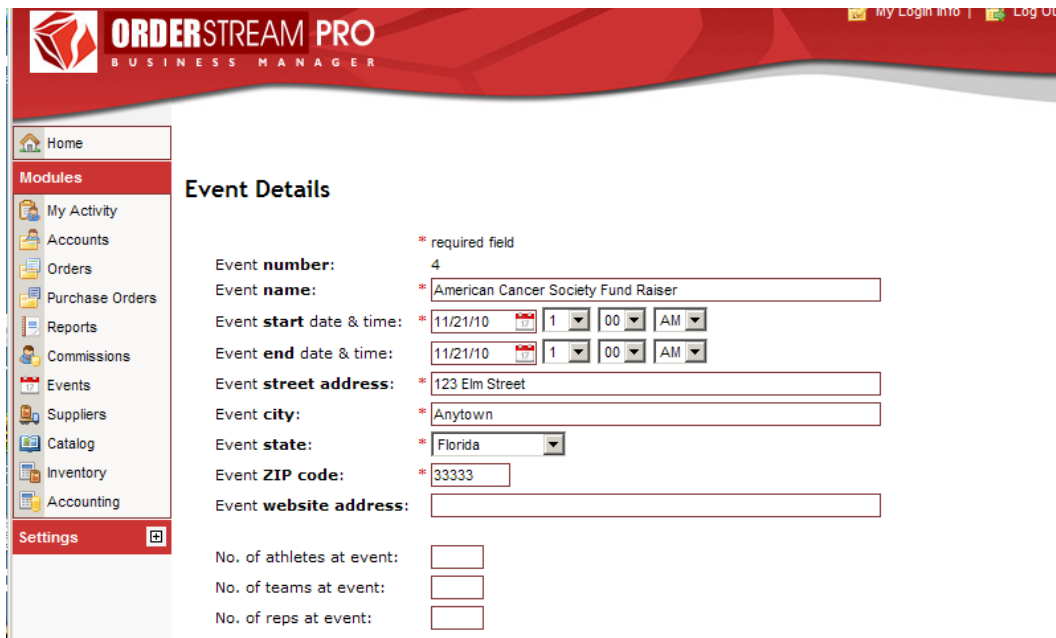
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21 American Cancer Society Fund Raiser	22	23	24	25	26	27
28	29	30 US Olympic Event				

Events can be described and documented in three sections:

- Event Details
- Representative Information
- Host Information
- Orders for this Event

Following is a brief description of each:

Event Details



The screenshot shows the 'Event Details' form in the ORDERSTREAM PRO Business Manager. The form includes the following fields:

- Event **number**: 4 (marked as a required field)
- Event **name**: American Cancer Society Fund Raiser
- Event **start date & time**: 11/21/10 1:00 AM
- Event **end date & time**: 11/21/10 1:00 AM
- Event **street address**: 123 Elm Street
- Event **city**: Anytown
- Event **state**: Florida
- Event **ZIP code**: 33333
- Event **website address**: (empty)

Below the form, there are three input boxes for:

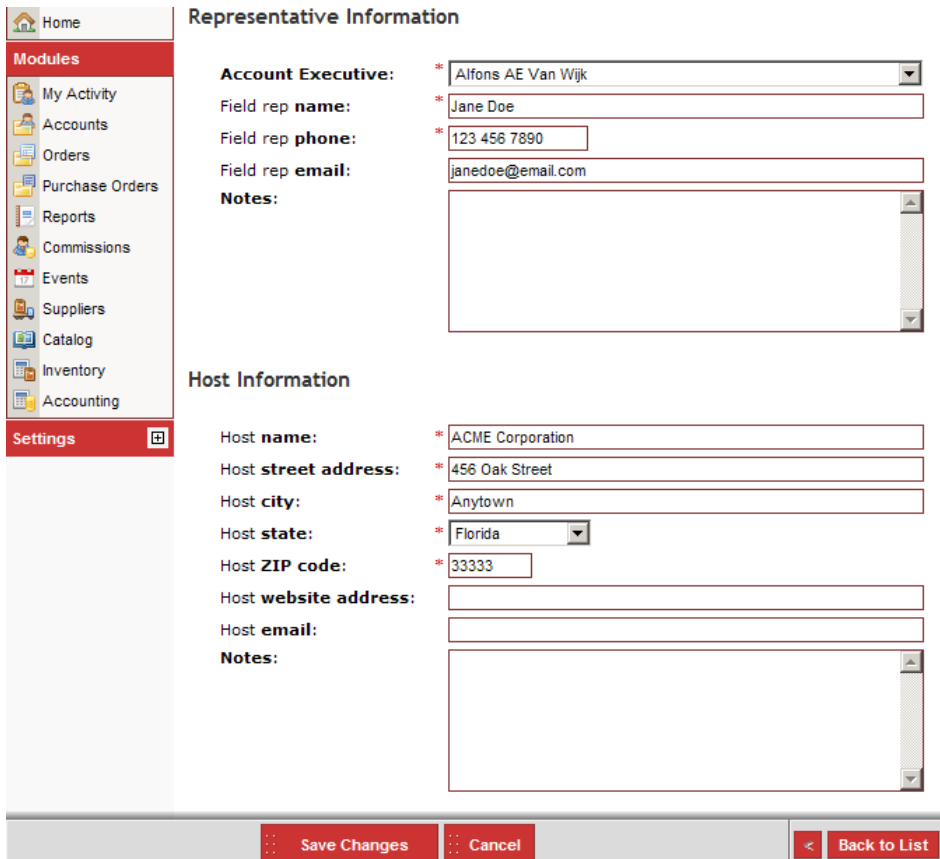
- No. of athletes at event:
- No. of teams at event:
- No. of reps at event:

Event details include the following:

- Event number is assigned by the system
- Event Name – decide how you want to define your events. A consistent approach will make it easier to do searches.
- Event start and end date
- Event address
- Event website address

Then there are three boxes to indicate the number of athletes, teams and reps as an event. These boxes can be used to record other number as well. For example, instead of athletes, it could be the number of employees.

Representative Information and Host Information



The screenshot shows a software interface with a sidebar on the left containing a 'Home' button and a 'Modules' list: My Activity, Accounts, Orders, Purchase Orders, Reports, Commissions, Events, Suppliers, Catalog, Inventory, and Accounting. Below the modules is a 'Settings' button. The main content area is titled 'Representative Information' and contains the following fields: 'Account Executive:' (a dropdown menu with 'Alfons AE Van Wijk' selected), 'Field rep name:' (text input with 'Jane Doe'), 'Field rep phone:' (text input with '123 456 7890'), 'Field rep email:' (text input with 'janedoe@email.com'), and 'Notes:' (a large text area). Below this is the 'Host Information' section with fields for: 'Host name:' (text input with 'ACME Corporation'), 'Host street address:' (text input with '456 Oak Street'), 'Host city:' (text input with 'Anytown'), 'Host state:' (dropdown menu with 'Florida' selected), 'Host ZIP code:' (text input with '33333'), 'Host website address:' (text input), 'Host email:' (text input), and 'Notes:' (a large text area). At the bottom of the form are three buttons: 'Save Changes', 'Cancel', and 'Back to List'.

Representative Information can be used to define whoever is representing you at the event.

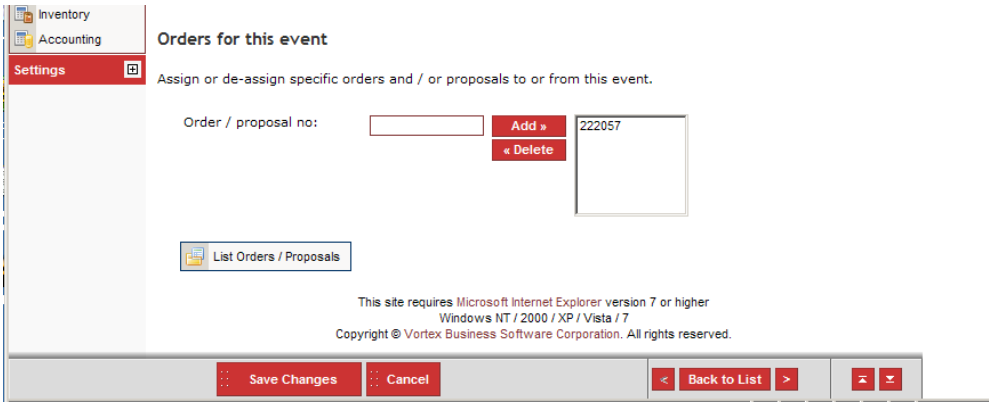
The **Notes** field is very flexible and you may enter whatever information is useful to you, e.g. the hotel the rep is staying at, additional reps assisting at the event, etc.

Host Information should be used to record the contact information of the individual or organization that is hosting the event.

The **Notes** field is very flexible and you may enter whatever is useful to you.

Please make sure to save whatever information you have entered.

Orders for this Event



Inventory
Accounting
Settings

Orders for this event

Assign or de-assign specific orders and / or proposals to or from this event.

Order / proposal no: **Add »**
« Delete

[List Orders / Proposals](#)

This site requires Microsoft Internet Explorer version 7 or higher
Windows NT / 2000 / XP / Vista / 7
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Save Changes **Cancel** **< Back to List >**

This is used to enter the order numbers associated with this event. Once entered a link is created so that orders are easily accessed from an event list.