BANQUET CRM MANUAL

BANQUET CRM

BANQUER CRM is a Sales and Event Management web application for restaurants, hotels and unique venues that will increase event sales and streamline the planning process.

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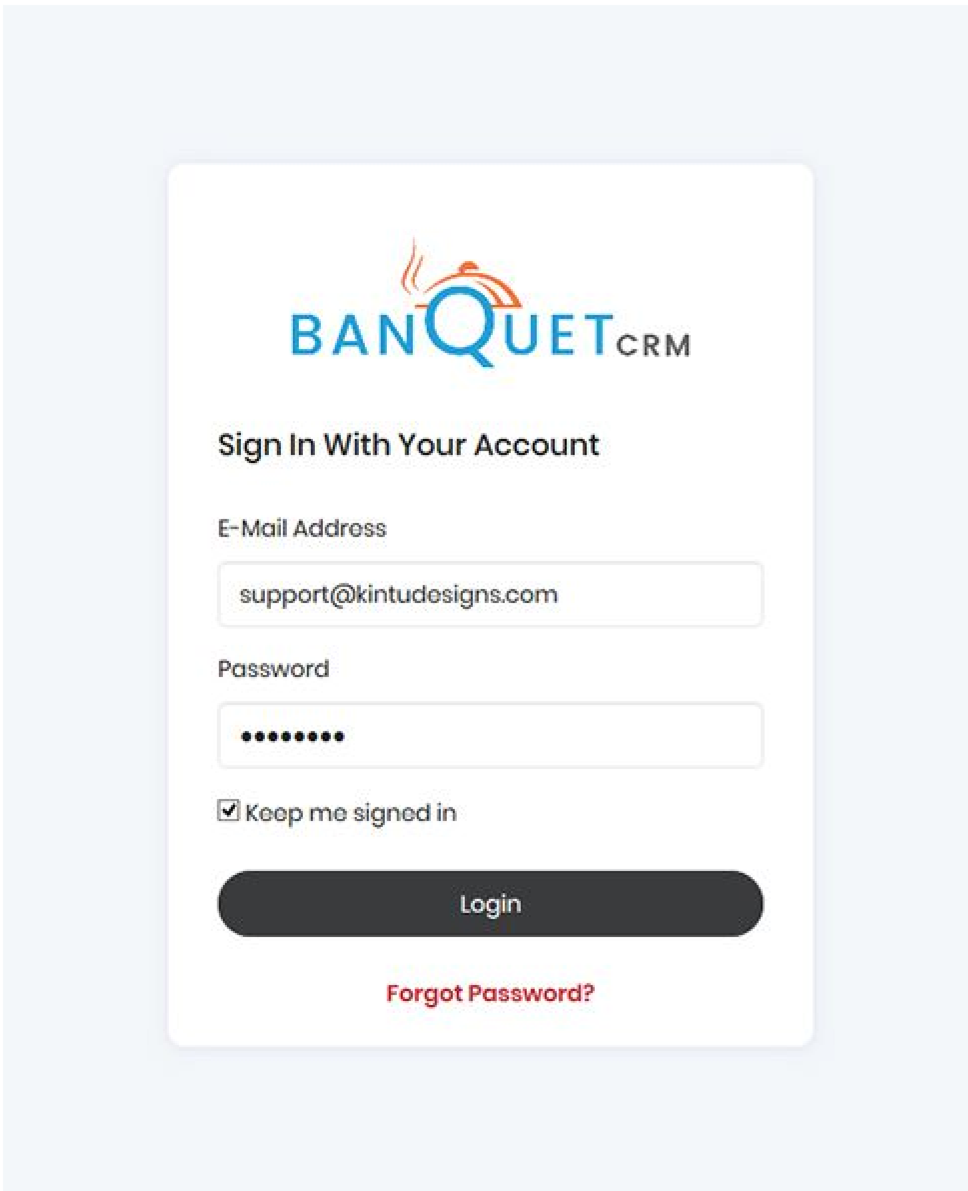
LOGIN


BANQUET CRM
Sign In With Your Account
E-Mail Address
support@kintudesigns.com
Password
Keep me signed in
Login
Forgot Password?

Login Details as below :

- **SUPER ADMIN**
  Email id: support@kintudesigns.com
  Password: asdf1234

- **STAFF ACCESS**
  Staff Admin: Edward
  email id: edwards@crm.com
  password: asdf1234

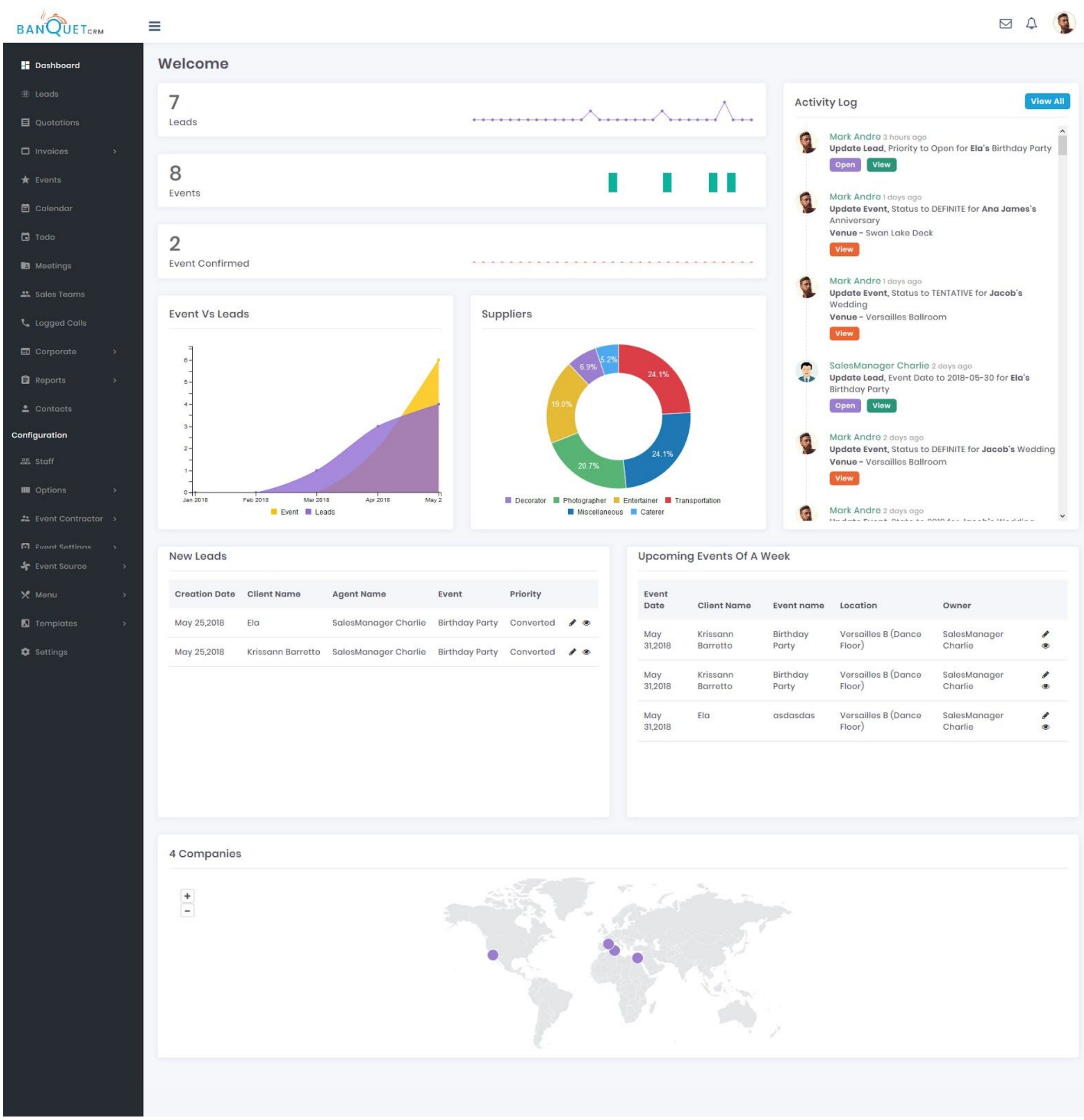
  Staff: David
  email id: miller@crm.com
  password: asdf1234

  Marketing Executive : John
  email id: leo@crm.com
  password: asdf1234

  Sales Manager : Charlie
  email id: charlie@gmail.com
  password: asdf@1234

DASHBOARD

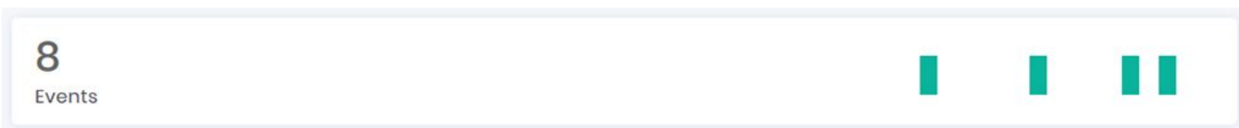
http://banquetcrm.kintudesigns.com/



Total Leads

Displays total numbers of leads of current month.

Total Events

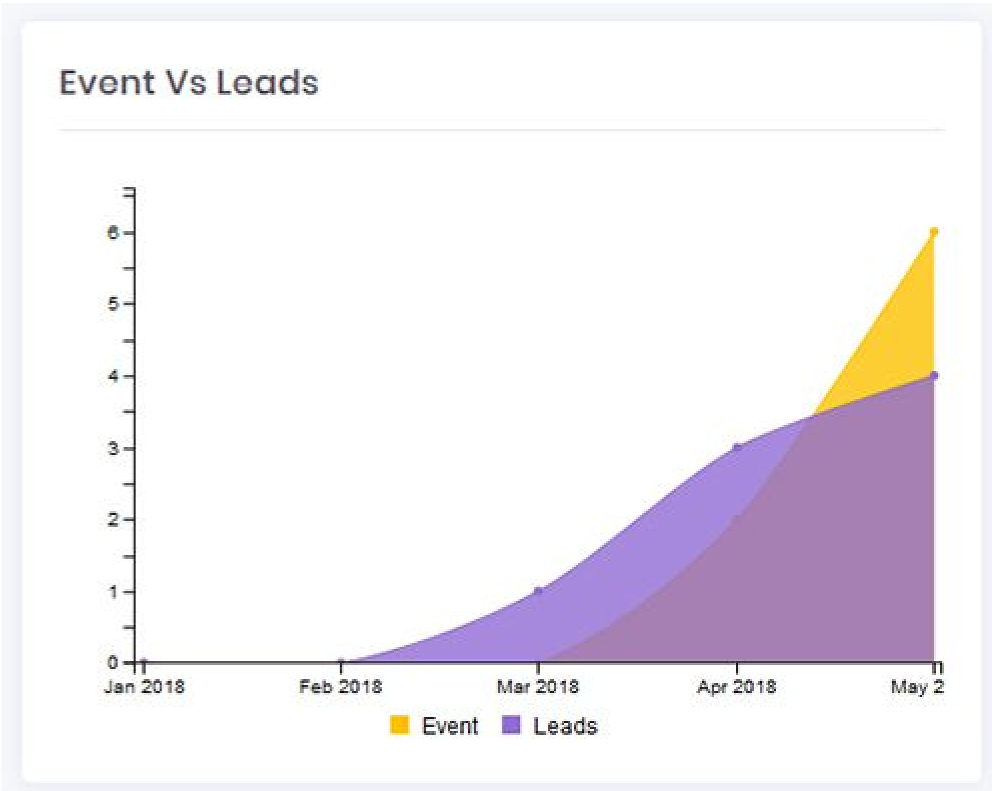


Displays total numbers of events of current month.

Total Sales Order

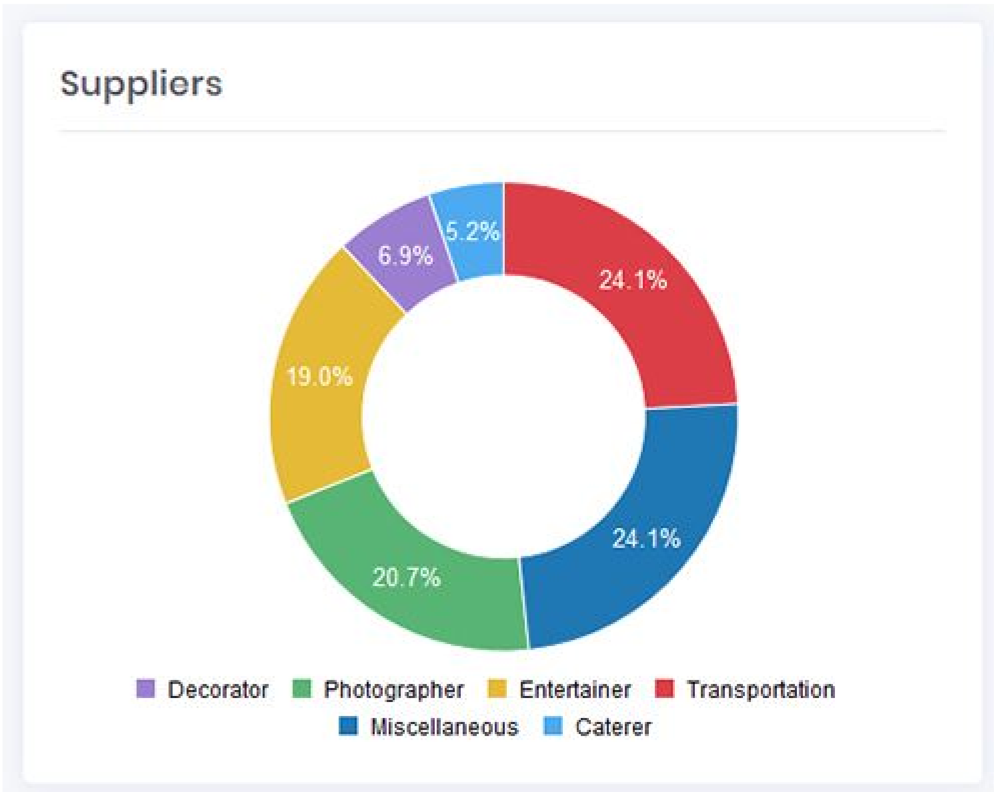
Displays total numbers of sales order(confirmed events).

Event Vs Leads



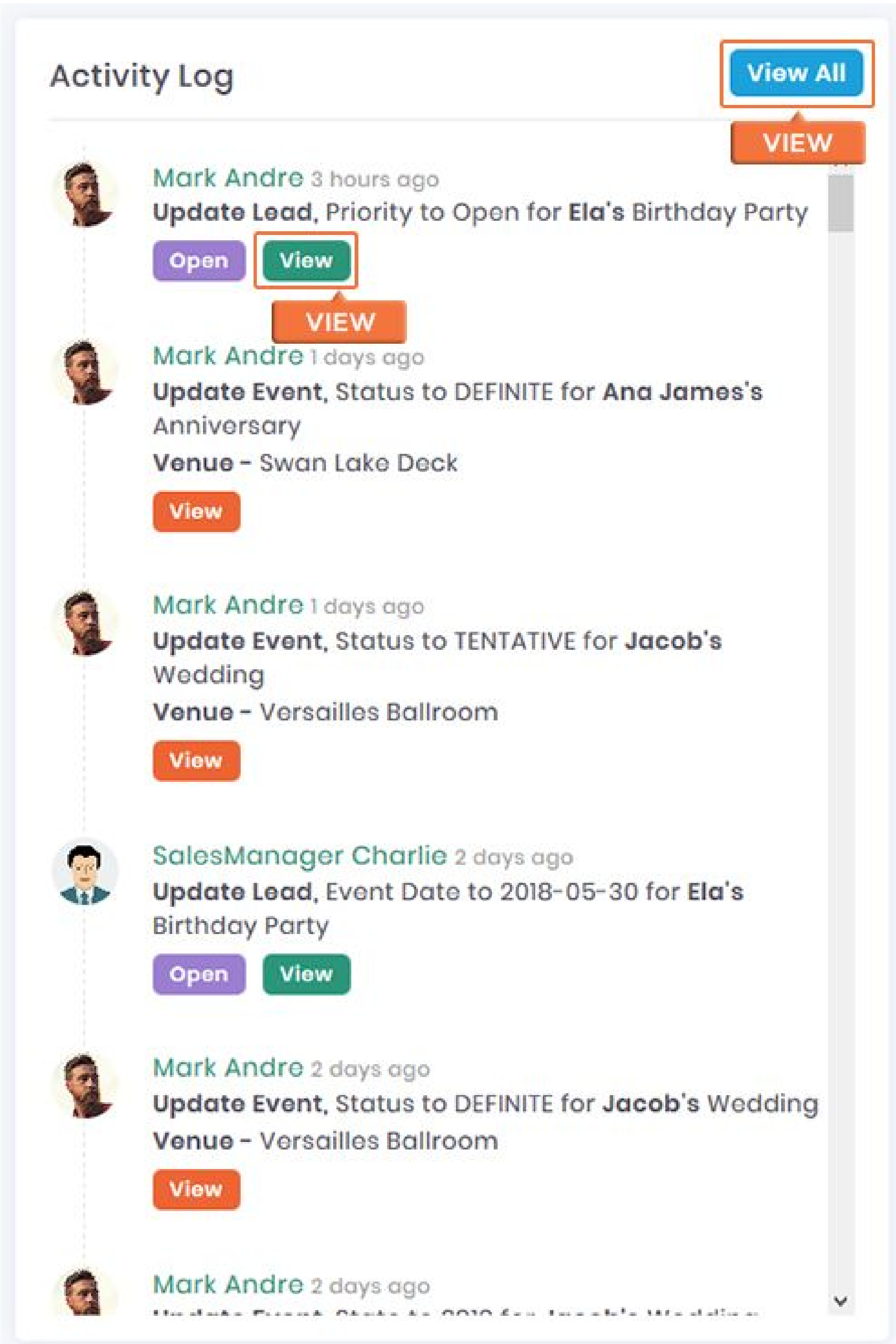
Graph shows the Event Vs Leads Ratio in a year.

Suppliers



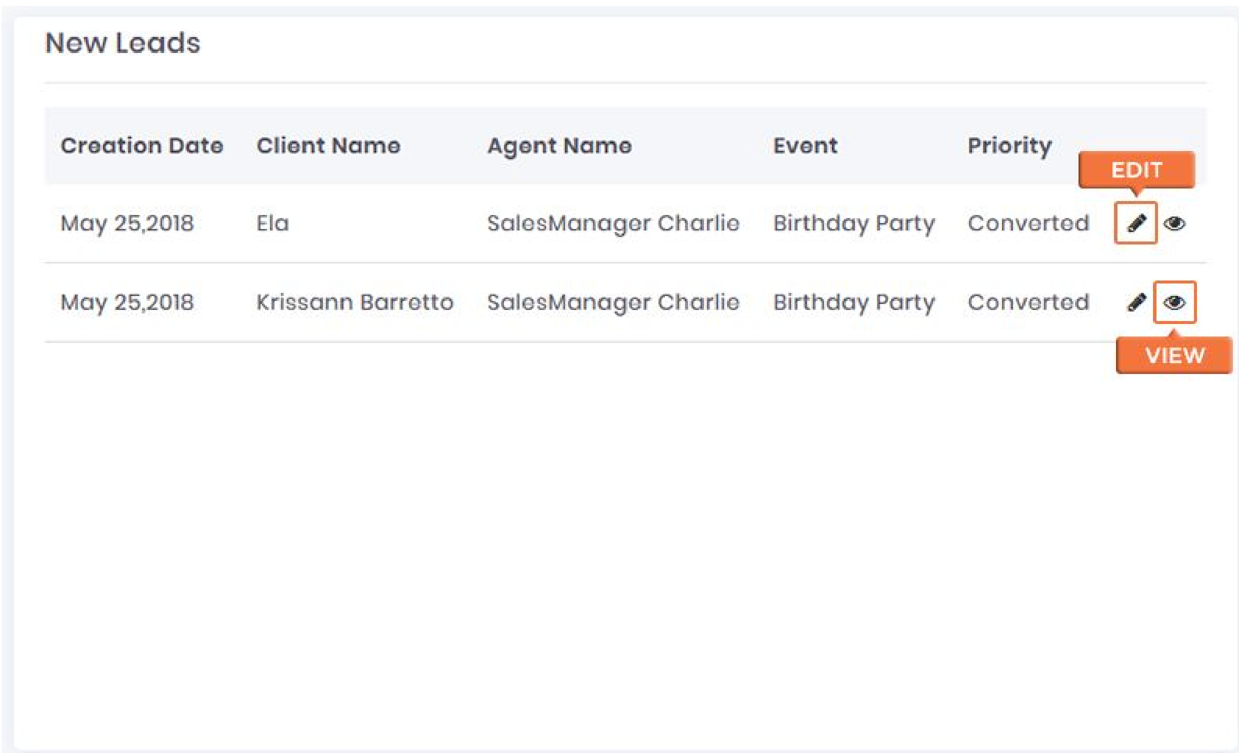
Graph shows % of total Suppliers already working with you till now.

Activity Log



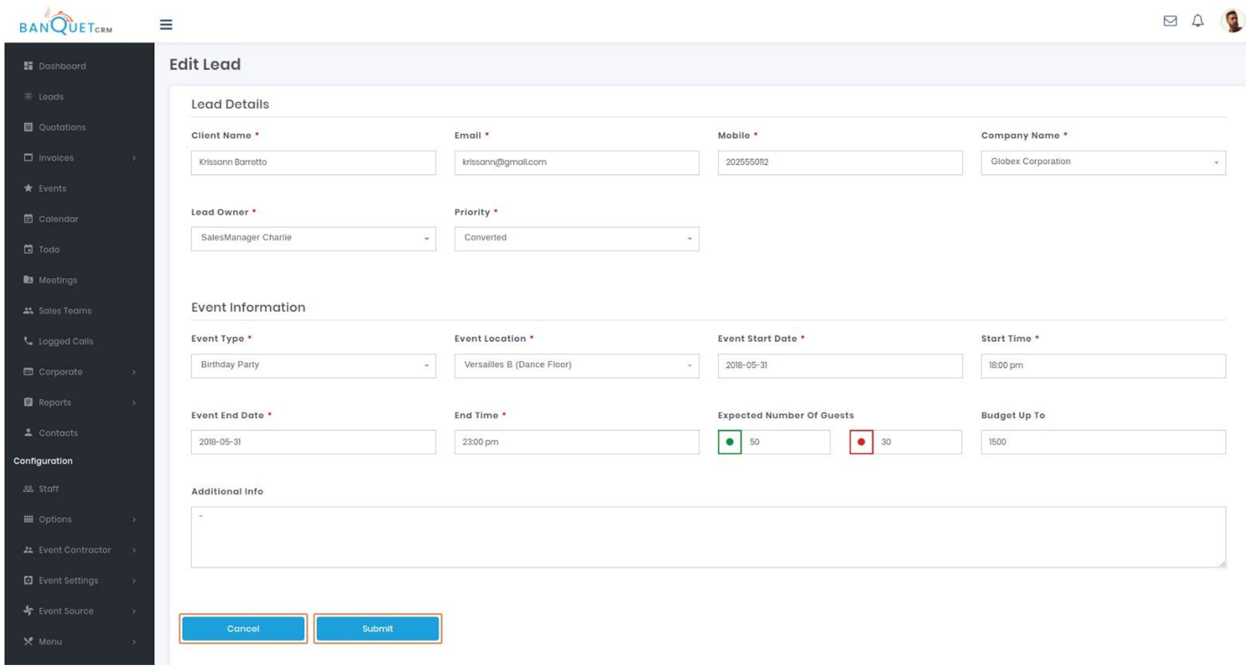
- Shows the log of activities performed.
- You can view details of activity performed by clicking on "VIEW" button of particular activity from the activity log list.
- You can view all activities performed by clicking on "VIEW ALL" button.

New Leads



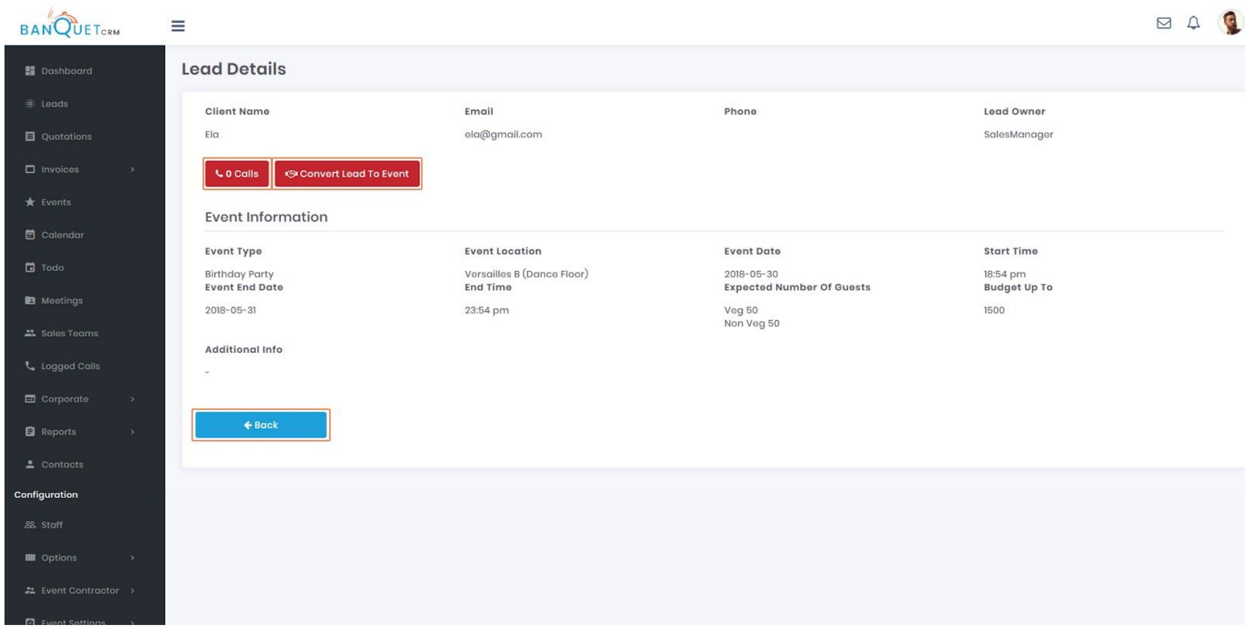
- List shows all new leads created.
- You can directly EDIT / VIEW - any listed lead from here.

Edit Lead :



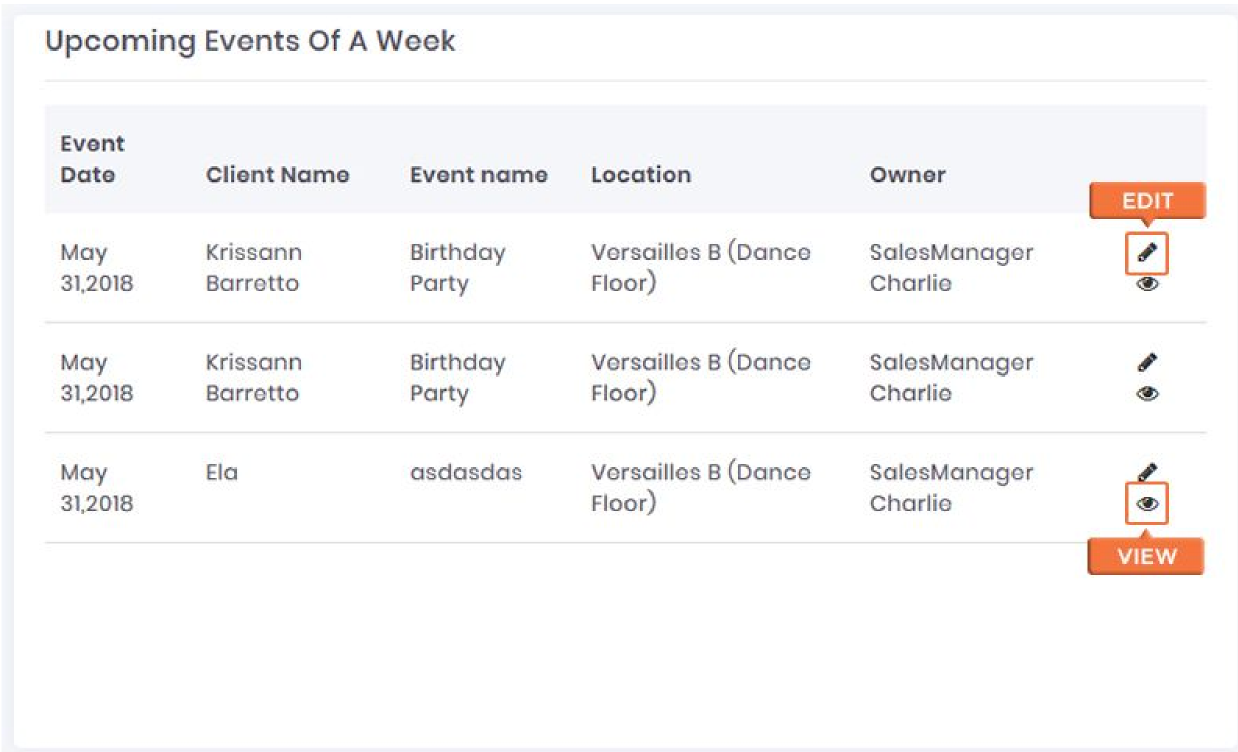
- Click on "EDIT" icon (pencil icon) on the right hand side of particular lead to make any changes.
- By clicking on "EDIT" icon, edit lead page will open. Here, you can make necessary changes in lead & basic event information. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Lead :



- Click on "VIEW" icon (eye icon) on the right hand side of particular lead to view lead information.
- Here, you can also view calls detail by clicking on “CALLS” button.
- Also, you can convert this lead into event by clicking on “CONVERT LEAD TO EVENT” button. So, that lead would be converted into event and quotation for that event would be generated automatically.
- Click on “BACK” button to return to leads list.

Upcoming Events of a Week



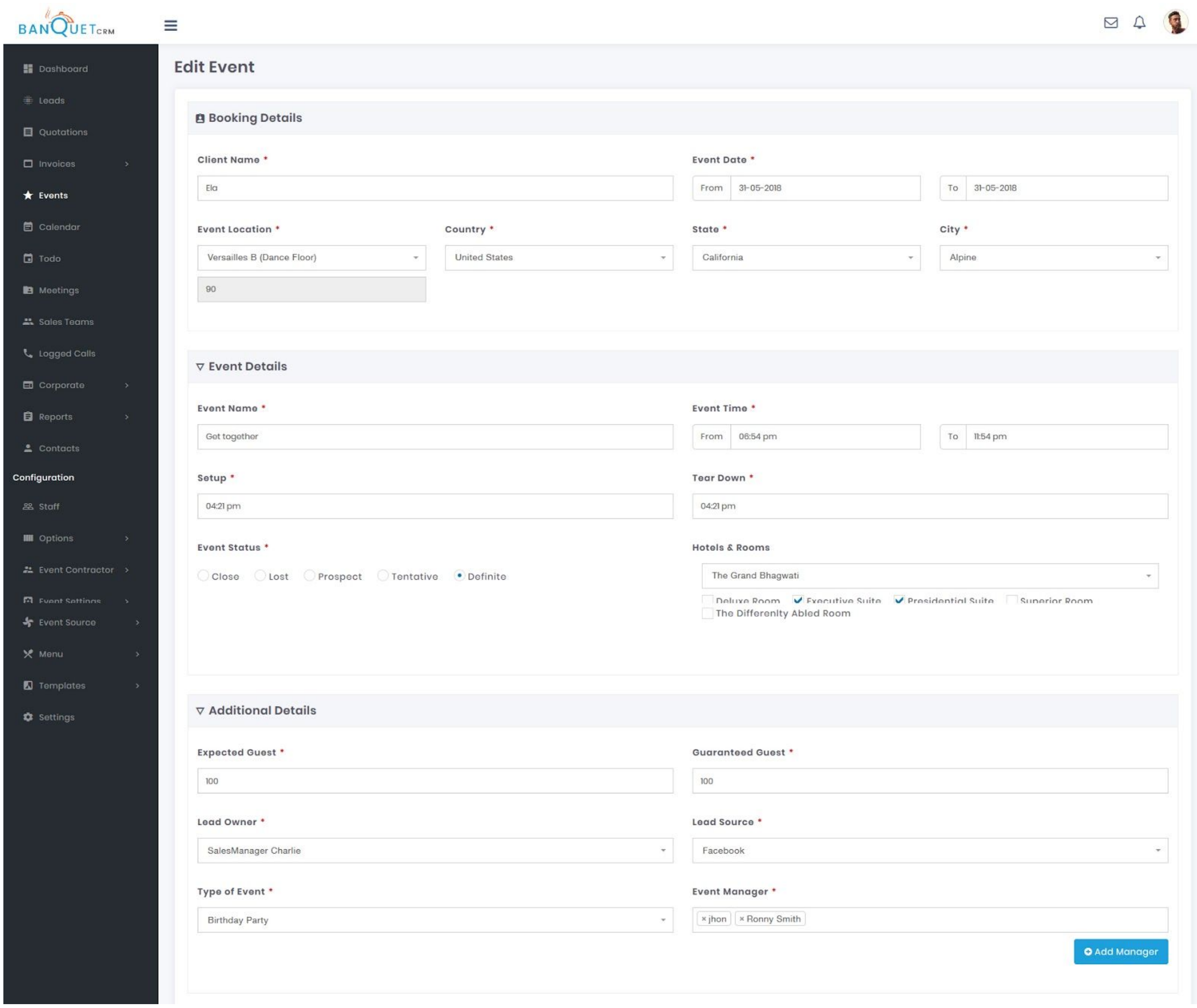
Upcoming Events Of A Week

Event Date	Client Name	Event name	Location	Owner	
May 31,2018	Krissann Barretto	Birthday Party	Versailles B (Dance Floor)	SalesManager Charlie	EDIT
May 31,2018	Krissann Barretto	Birthday Party	Versailles B (Dance Floor)	SalesManager Charlie	
May 31,2018	Ela	asdasdas	Versailles B (Dance Floor)	SalesManager Charlie	VIEW

- List shows all the events which are upcoming for the week.

- You can directly EDIT / VIEW - any listed event from here.

Edit Event :



BANQUET CRM
Dashboard
Leads
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Contacts
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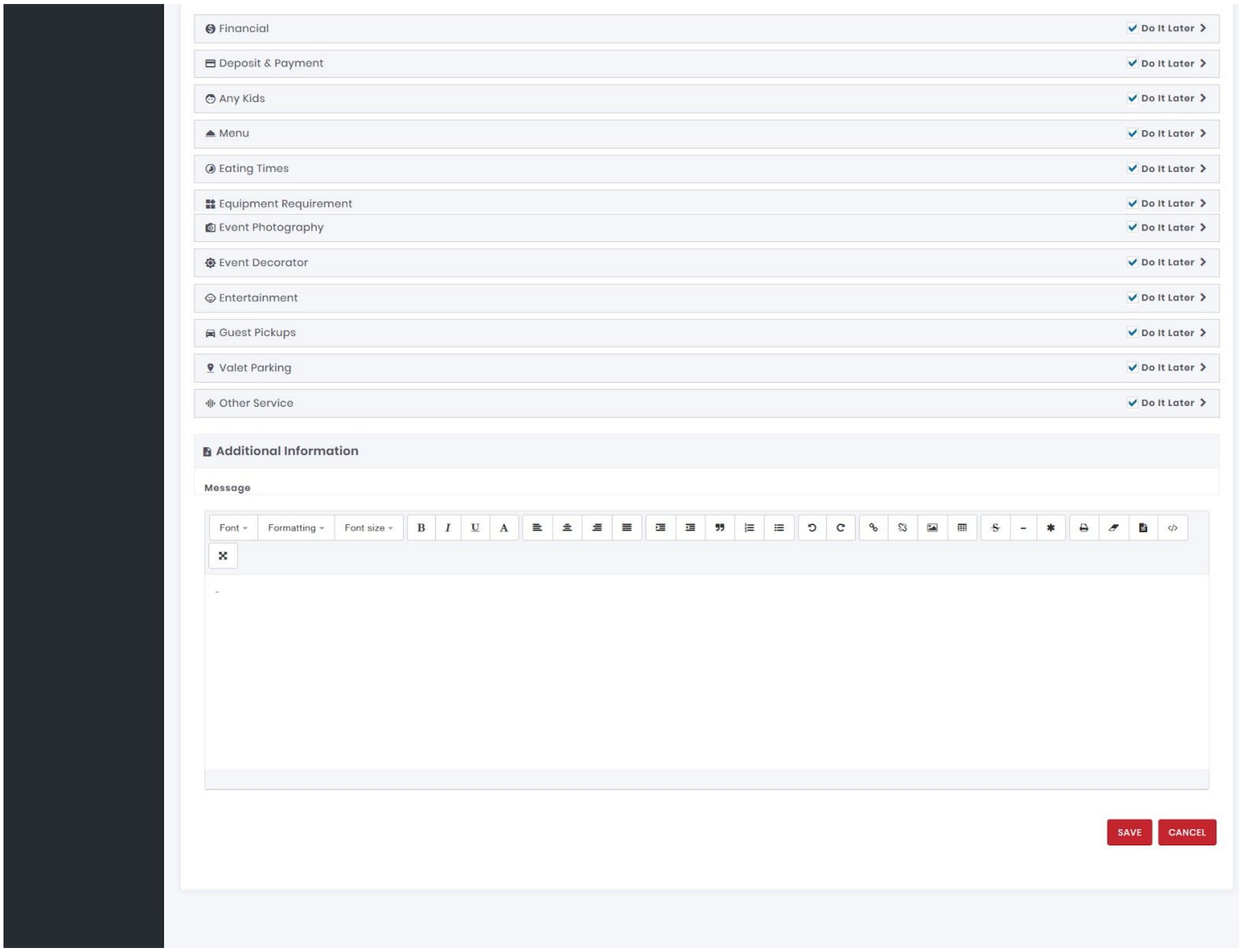
Event Contractor
Event Settings
Event Source
Menu
Templates
Settings
Edit Event
Booking Details
Client Name *
Ela
Event Date *
From 31-05-2018
To 31-05-2018
Event Location *
Versailles B (Dance Floor)
90
Country *
United States
State *
California
City *
Alpine
Event Details
Event Name *
Get together
Event Time *
From 06:54 pm
To 11:54 pm
Setup *
04:21 pm
Tear Down *
04:21 pm
Event Status *
Close
Lost
Prospect
Tentative
Definite
Hotels & Rooms
The Grand Bhagwati
Deluxe Room
Executive Suite
Presidential Suite
Superior Room
The Differenlty Abled Room
Additional Details
Expected Guest *
100
Guaranteed Guest *
100
Lead Owner *
SalesManager Charlie
Lead Source *
Facebook
Type of Event *
Birthday Party
Event Manager *
× jhon
× Ronny Smith
Add Manager

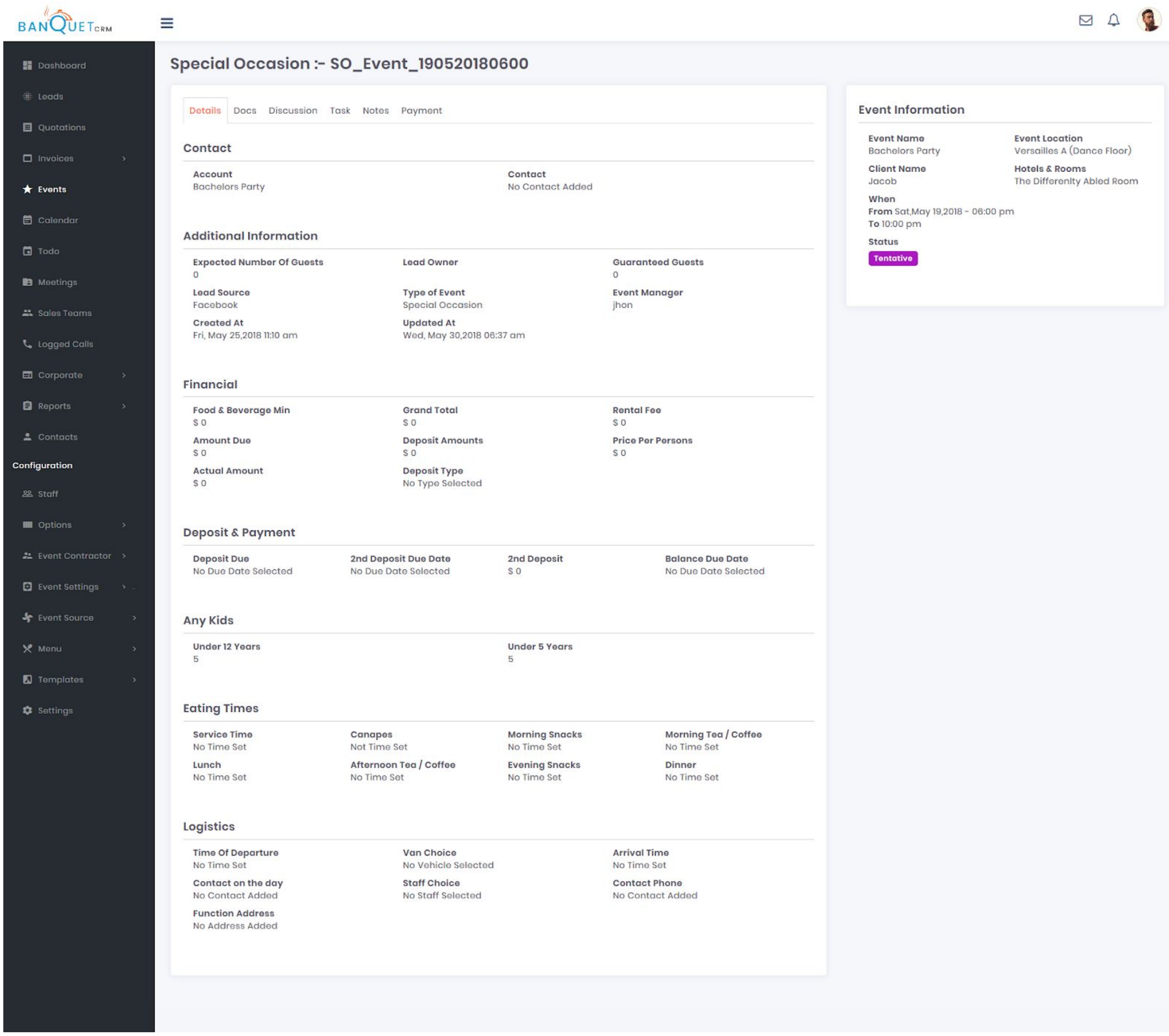


- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular event.
- By clicking on "EDIT" icon, edit event page will open. Here, you can make necessary changes in the event information. Then click on “SAVE” button at the bottom of the page to save the changes or click on “CANCEL” button to ignore changes.

View Event :

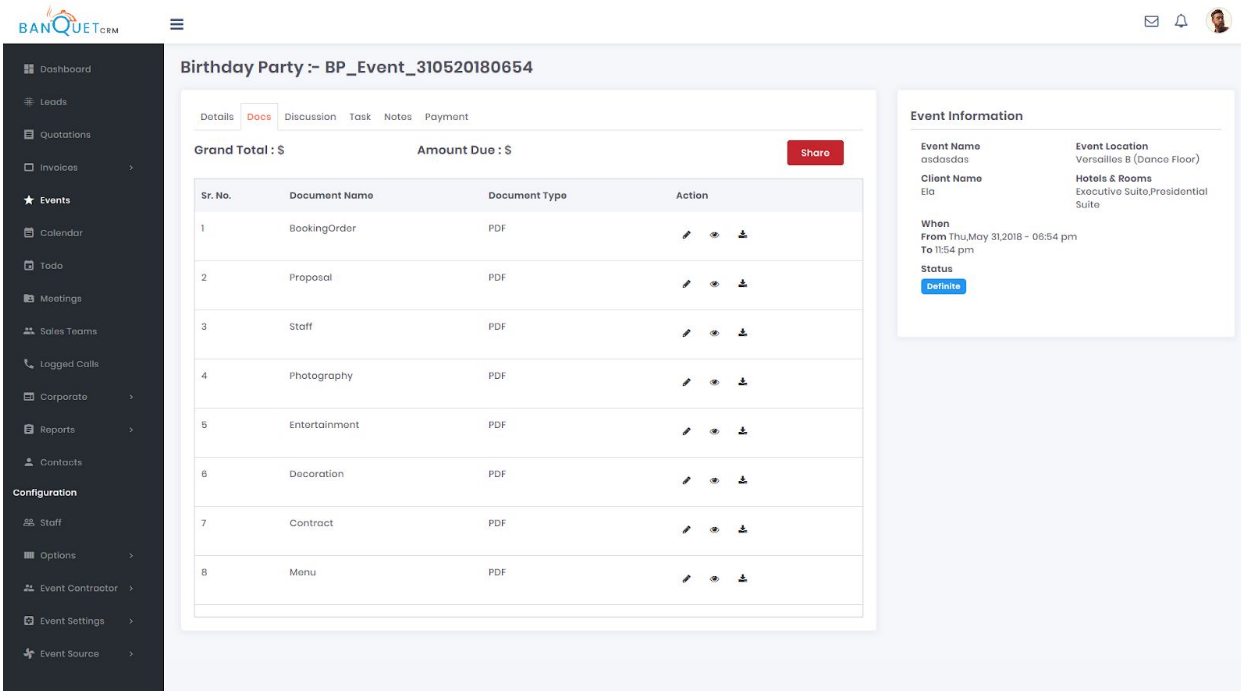
- Click on "VIEW" icon (eye icon) in OPTIONS column to view event’s complete information.
- Here, you can find Details | Docs | Discussion | Task | Notes | Payment tabs.

Details :



- Here, you can have a quick overview of event's complete details.

Docs :



- Click on “Docs” tab.

- Here, you can view all documents related to an event in .pdf format : Booking Order, Proposal, Staff, Photography, Entertainment, Decoration, Contract, Menu.

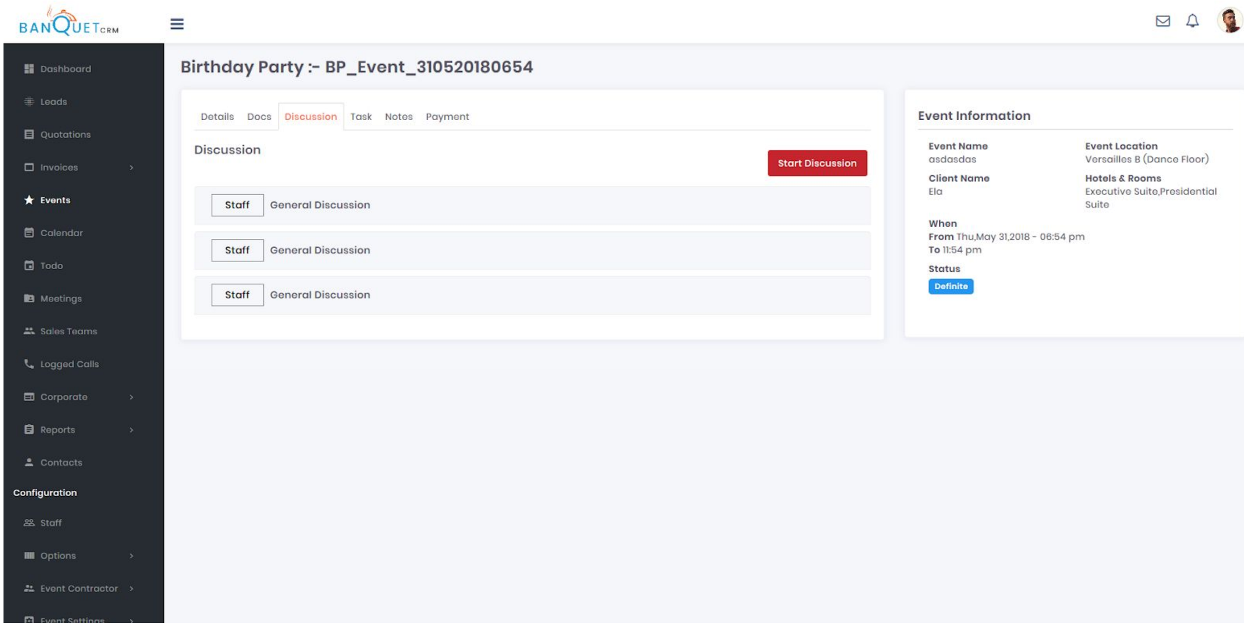
- You can EDIT / VIEW / DOWNLOAD these all documents.

- Click on "EDIT" button of particular document to edit. By clicking on "EDIT" button, you will be redirected to edit event page. Make necessary changes then click on “SAVE” button at the bottom of the page to save the changes or click on “CANCEL” button to ignore changes.

- Click on "VIEW" button of particular document to edit. By clicking on "EDIT" button, you will be redirected to edit event page. Make necessary changes then click on “SAVE” button at the bottom of the page to save the changes or click on “CANCEL” button to ignore changes.

- These changes will reflect in all documents of an event.

Discussion :



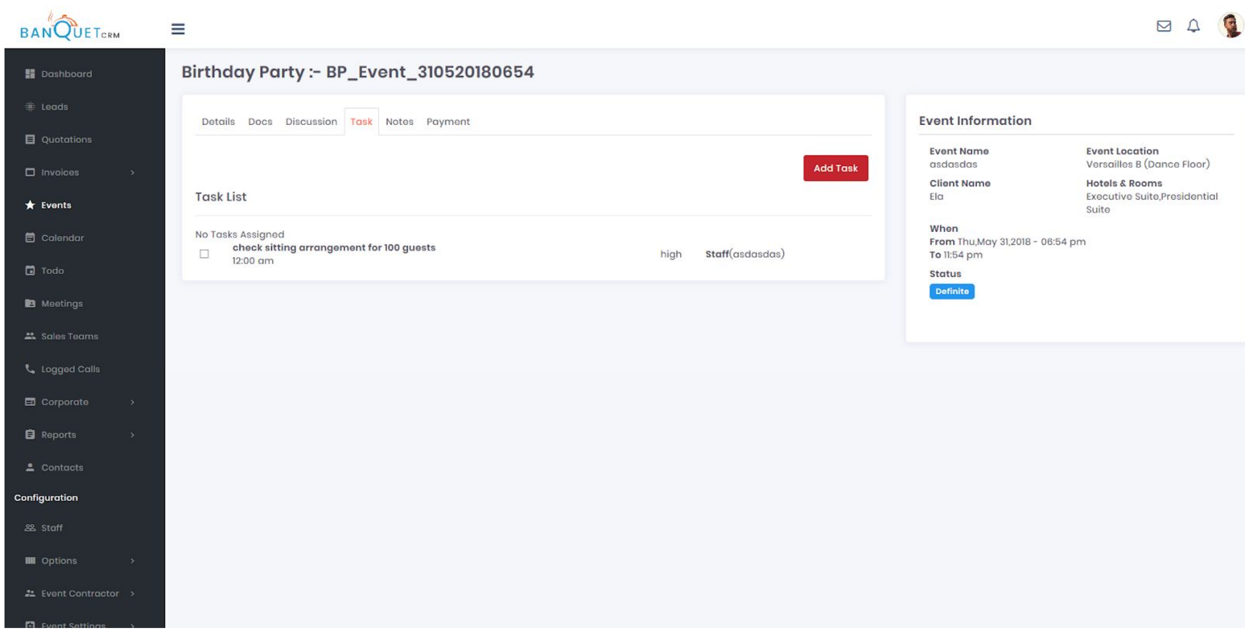
- Click on “Discussion” tab.

- Here, you can do discussion with staff as well as the guest.

- You can continue discussion with already initiated discussion according to related subject. Or you can start discussion on new subject by clicking on “START DISCUSSION” button.

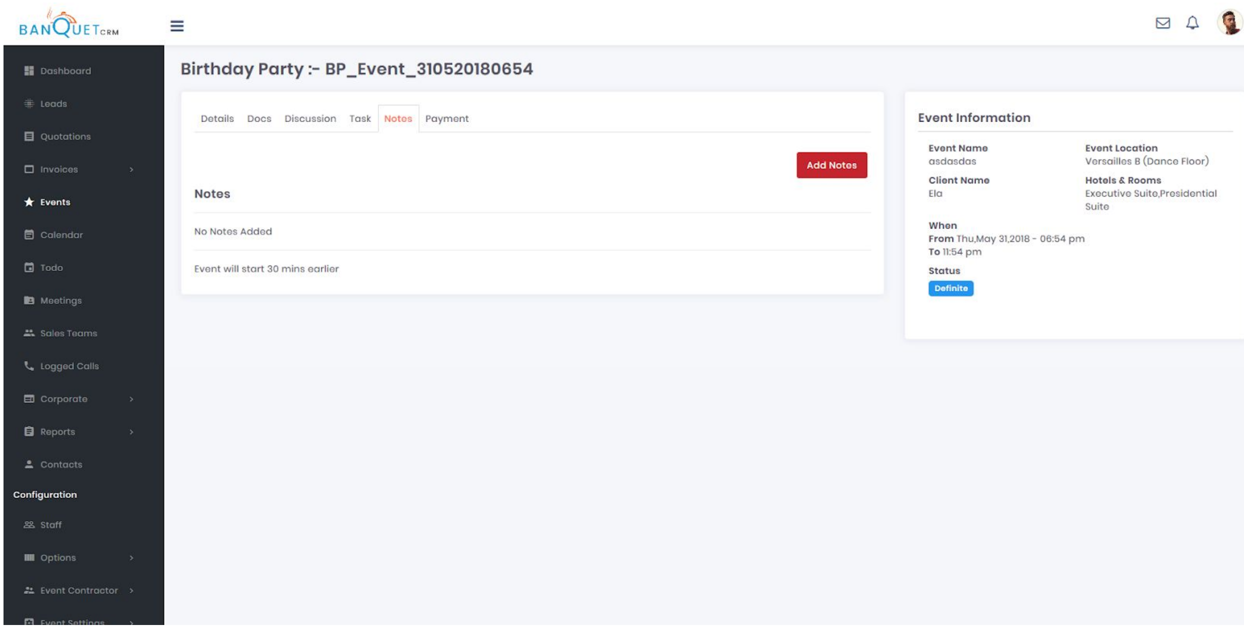
- By clicking on “START DISCUSSION” button, one popup will open. Where you can enter discussion subject, description, select recipients and you can upload any file related to that discussion.

Task :



- Click on “Task” tab.
- Here, you can assign task to any staff members by clicking on “ADD TASK”.
- By clicking on “ADD TASK” button, one popup will open. Where you can enter task description, associated to which event, assignees to whom task is supposed to assign, task deadline and task priority.

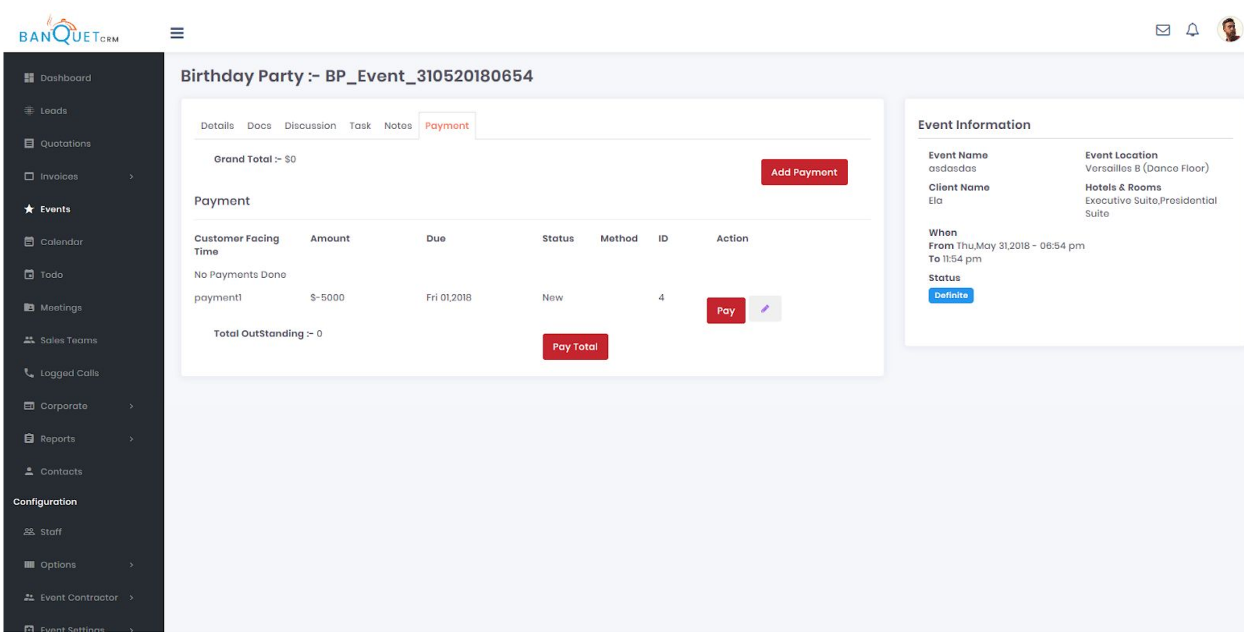
Notes :



- Click on “Notes” tab.

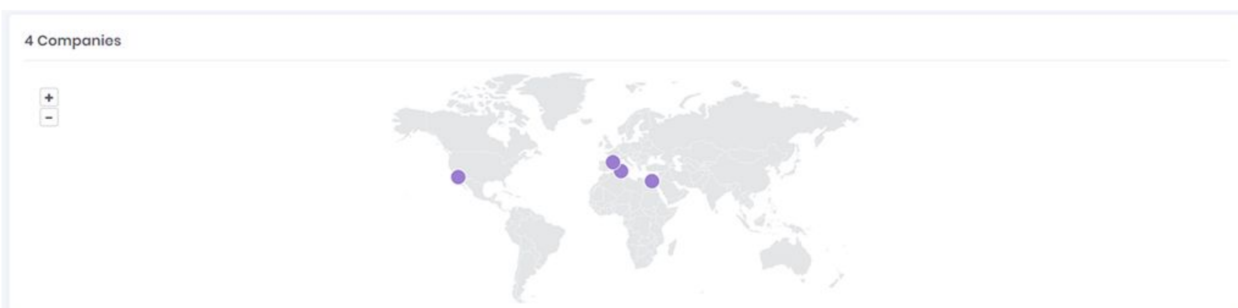
- Here, you can add notes related to event.

Payments :



- Click on “Payments” tab.
- Here, you can see payments listing (all paid & unpaid) for an event showing payment amount, payment due date, payment status, payment method.
- You can do payment process from “ACTION” column. There are 3 options 1. Request Payment, 2. Pay and 3. Edit
- Even you can add a new payment through “ADD PAYMENT” button. By clicking on it one pop up will open. Where you can select which amount to be paid from the dropdown or you can create custom amount to be paid and enter customer facing title for that payment, its due date and can add some internal note. Then click on "SAVE" to save the payment or click on "CANCEL" to ignore.

Companies

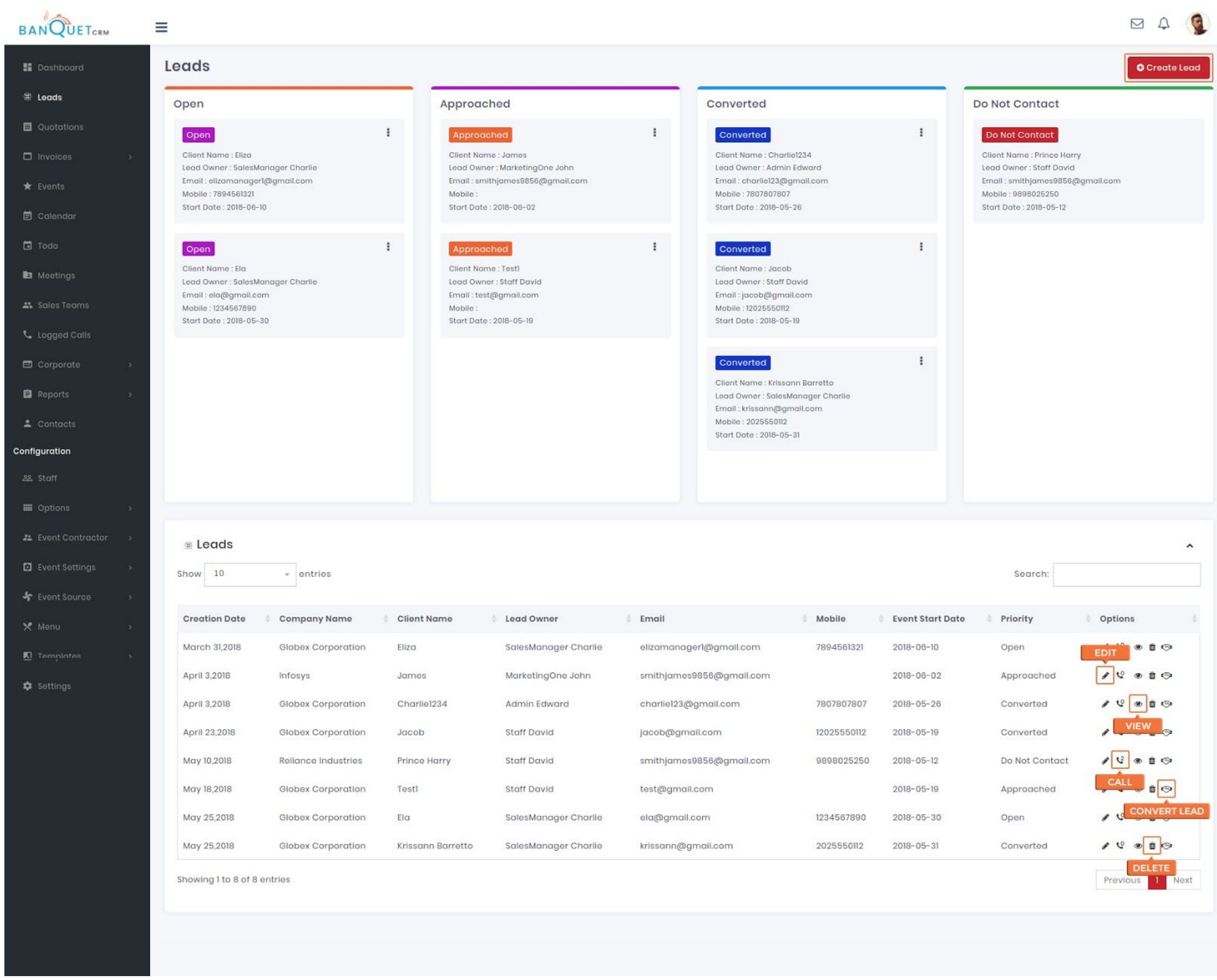


Shows location of Companies in map view which are associated with your groups.

LEADS

Leads

http://banquetcrm.kintudesigns.com/lead#/



- Shows Leads generated by the Marketing Team divided into following different lead stages in beautiful kanban view :

- Open
- Approach

- Converted
- Do Not Contact

- Each card in different lead stages shows client information, event type, date, time and lead owner.
- You can move lead card from one stage to another stage simply by dragging card according to its status.
- Leads in a converted stage (leads with a converted status) will be considered as an event and will be moved to prospect stage of events.
- Here, you can view list of all leads generated in a table view too.
- EDIT / VIEW / CALL / DELETE / CONVERT - lead through OPTIONS.

Edit Lead :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular lead.
- By clicking on "EDIT" icon, edit lead page will open. Here, you can make necessary changes in lead & basic event information. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Lead :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view lead information about particular lead.
- Here, you can also view calls detail by clicking on “CALLS” button.
- Also, you can convert this lead into event by clicking on “CONVERT LEAD TO EVENT” button. So, that lead would be converted into event and quotation for that event would be generated automatically.
- Click on “BACK” button to return to leads list.

Delete Lead :

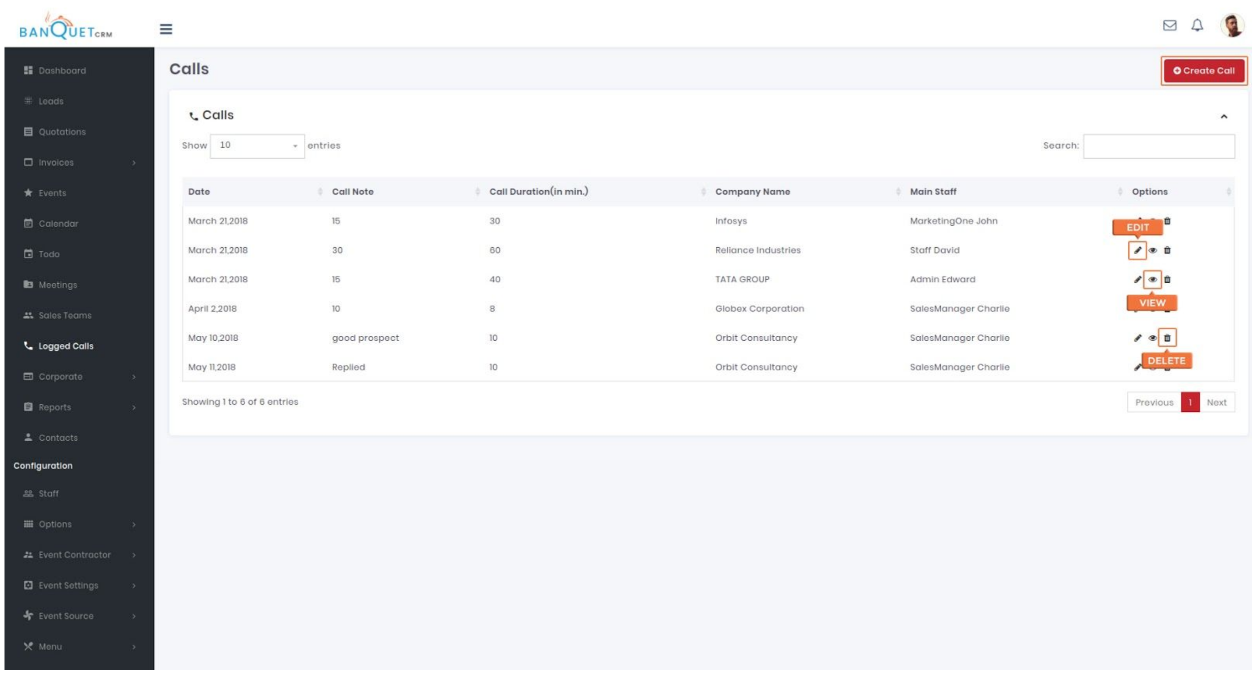
- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular lead.

Create New Lead :

http://banquetcrm.kintudesigns.com/lead/create#/

- Click on “CREATE LEAD” button to create new lead. Once you click on “CREATE LEAD” one form will open where you can fill all the information and create a new lead by clicking on “OK” button or click on “BACK” button to ignore.

Call Lead :



- Click on "CALL" icon (phone icon) in OPTIONS column to view calls history for that particular lead.

- By clicking on “CALL” icon, it will redirect you to the lead calls page. Where, you can view the list of calls made for that particular lead.
- EDIT / DELETE - call details through OPTIONS on lead calls page.

Create Call :

http://banquetcrm.kintudesigns.com/leadcall/11#/

- Here, you can also create new call details regarding that particular lead by clicking on “CREATE CALL” button whenever you make a call. Once you click on “CREATE CALL” one form will open where you can fill all the information regarding to lead call. Then click on “OK” button at the bottom of the page to create new call record of a lead or click on “BACK” button to ignore.

Edit Call Log :

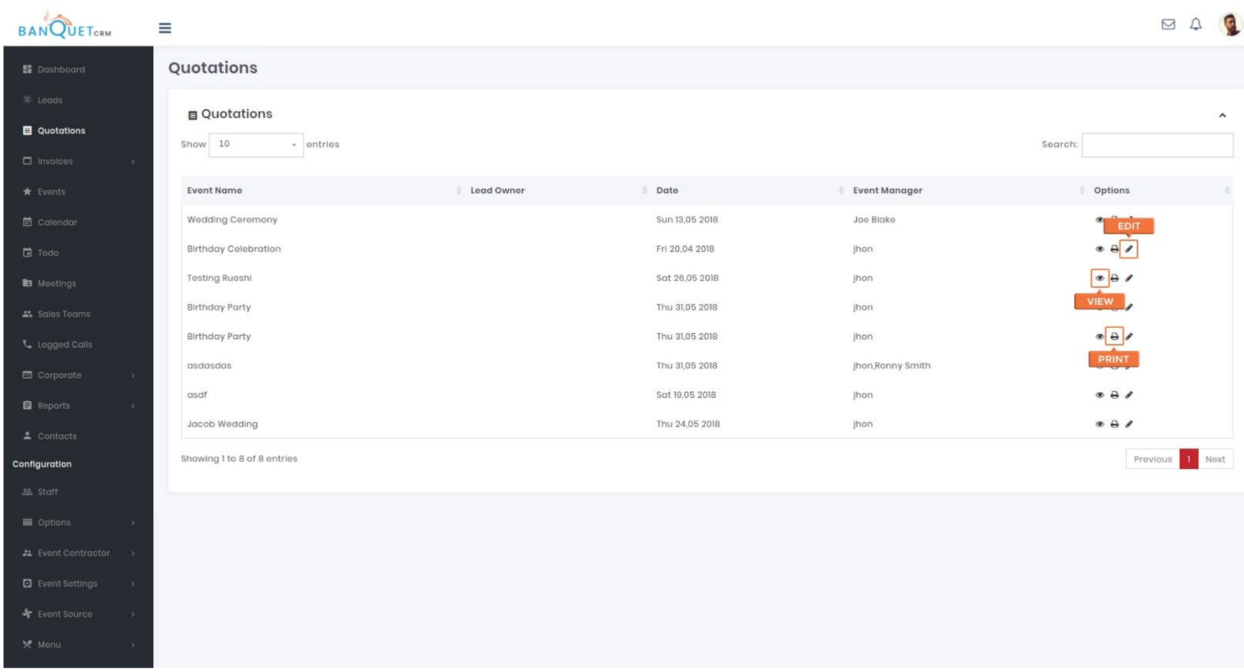
- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular lead call.
- By clicking on "EDIT" icon, edit lead call page will open. Here, you can make necessary changes in lead call information. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

Delete Call Log :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular call log.

QUOTATIONS

http://banquetcrm.kintudesigns.com/quotation#/



- Here, you can find the quotation for the each events which are converted leads.

- You can Edit / View - quotation for particular event through OPTIONS. Even you can download event proposal in .pdf format to get it print.

Edit Quotation :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular event proposal.

- By clicking on "EDIT" icon, edit event page will open. Here, you can make necessary changes in event proposal. You can skip some sections in event form by clicking on checkbox for “DO IT LATER” and then click on “SAVE” button at the bottom of the page to save the changes or click on “CANCEL” button to ignore changes.

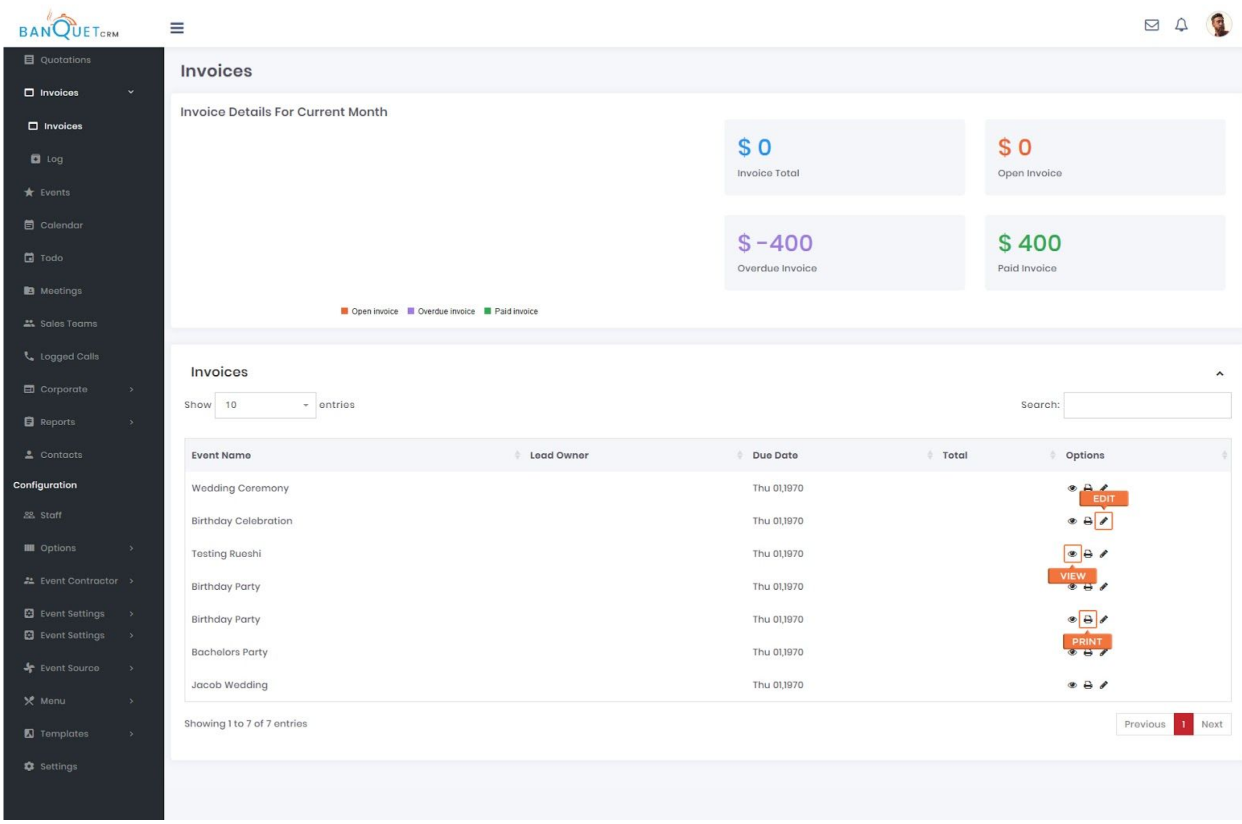
View Quotation :

- Click on "VIEW" icon (eye icon) in OPTIONS column to make any changes in particular event proposal.
- By clicking on "VIEW" icon, event proposal page will open. Here, you can view complete event proposal. You can skip some sections in event form by clicking on checkbox for “DO IT LATER” and then click on “SAVE” button at the bottom of the page to save the changes or click on “CANCEL” button to ignore changes.

INVOICES

Invoices

http://banquetcrm.kintu

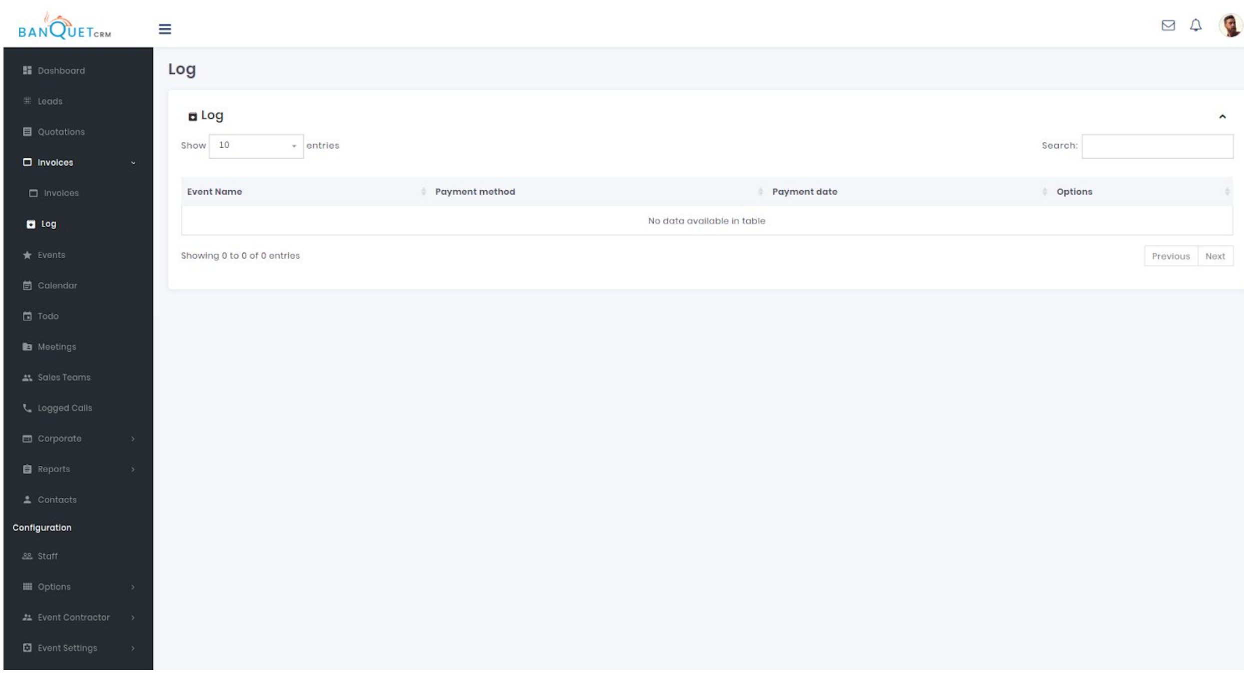


designs.com/invoice#/

- Here, you can view Invoice Details for Current Month in graphical form with Invoice Total, Open Invoice, Overdue Invoice, Paid Invoice.
- Here, you can view list of events for which you can view invoice.
- Click on "VIEW" icon (eye icon) in OPTIONS column of particular event to view that event's invoice. Even you can download event invoice in .pdf format to get it print.

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular event proposal.
- By clicking on "EDIT" icon, edit event page will open. Here, you can make necessary changes in event proposal. You can skip some sections in event form by clicking on checkbox for “DO IT LATER” and then click on “SAVE” button at the bottom of the page to save the changes or click on “CANCEL” button to ignore changes.
- After making changes in an event, new invoice will be generated according to that proposal, which you can again view by clicking on “VIEW” icon of particular event.

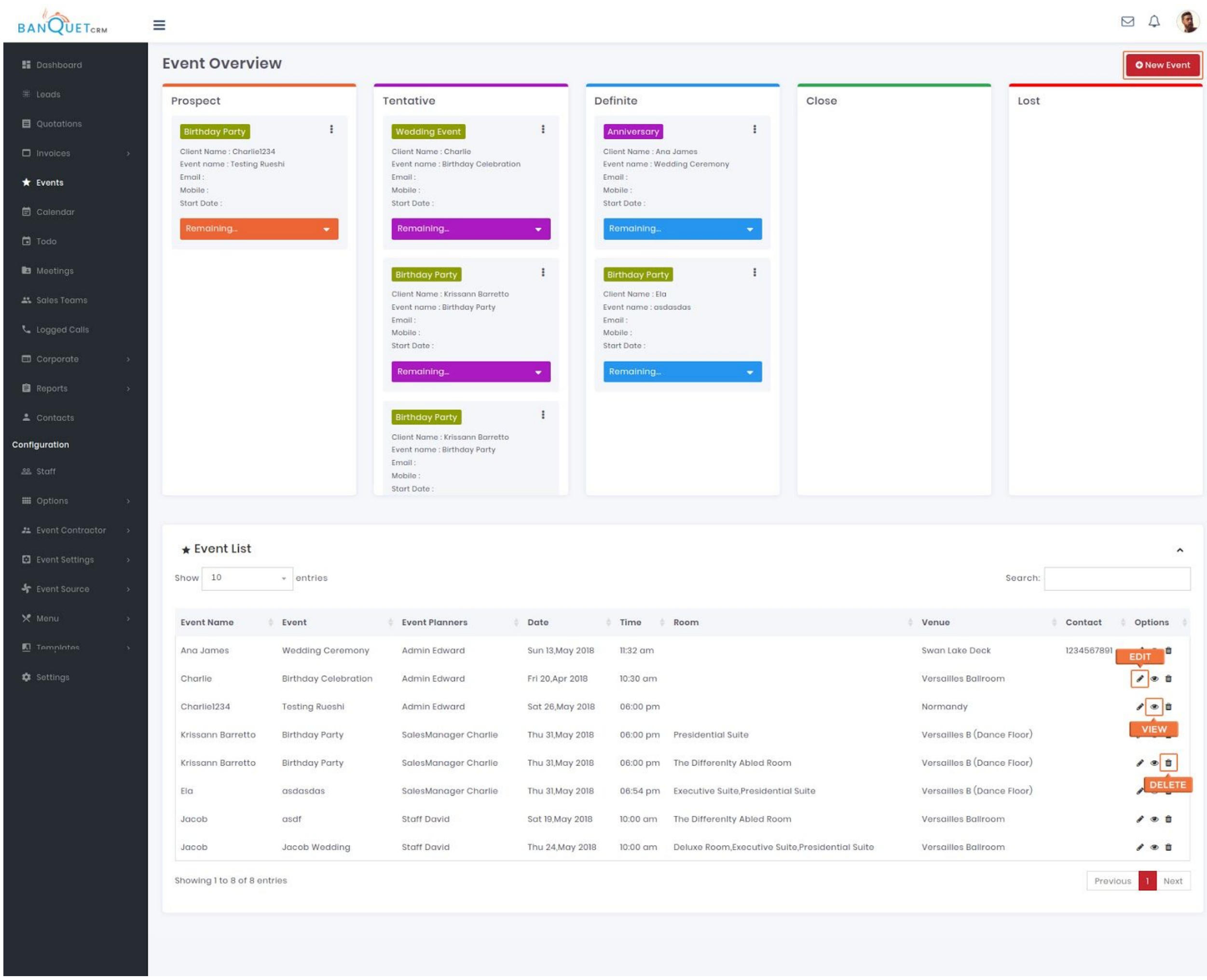
Log



- Here, you can view list of payment log of each events.

EVENTS

http://banquetcrm.kintudesigns.com/event#/



- Shows Events generated by the Marketing Team divided into following different event stages in beautiful kanban view :

- Prospect
- Tentative
- Definite

- Close
- Lost

- Each card in different event stages shows client information, event type, date, time and lead owner.
- You can move event card from one stage to another stage simply by dragging card according to its status.
- Events in a definite stage (events with a definite status) will be considered as a confirmed event.

- Here, you can view list of all events generated in a table view too.
- EDIT / VIEW / DELETE - event through OPTIONS.

Edit Event :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular event.
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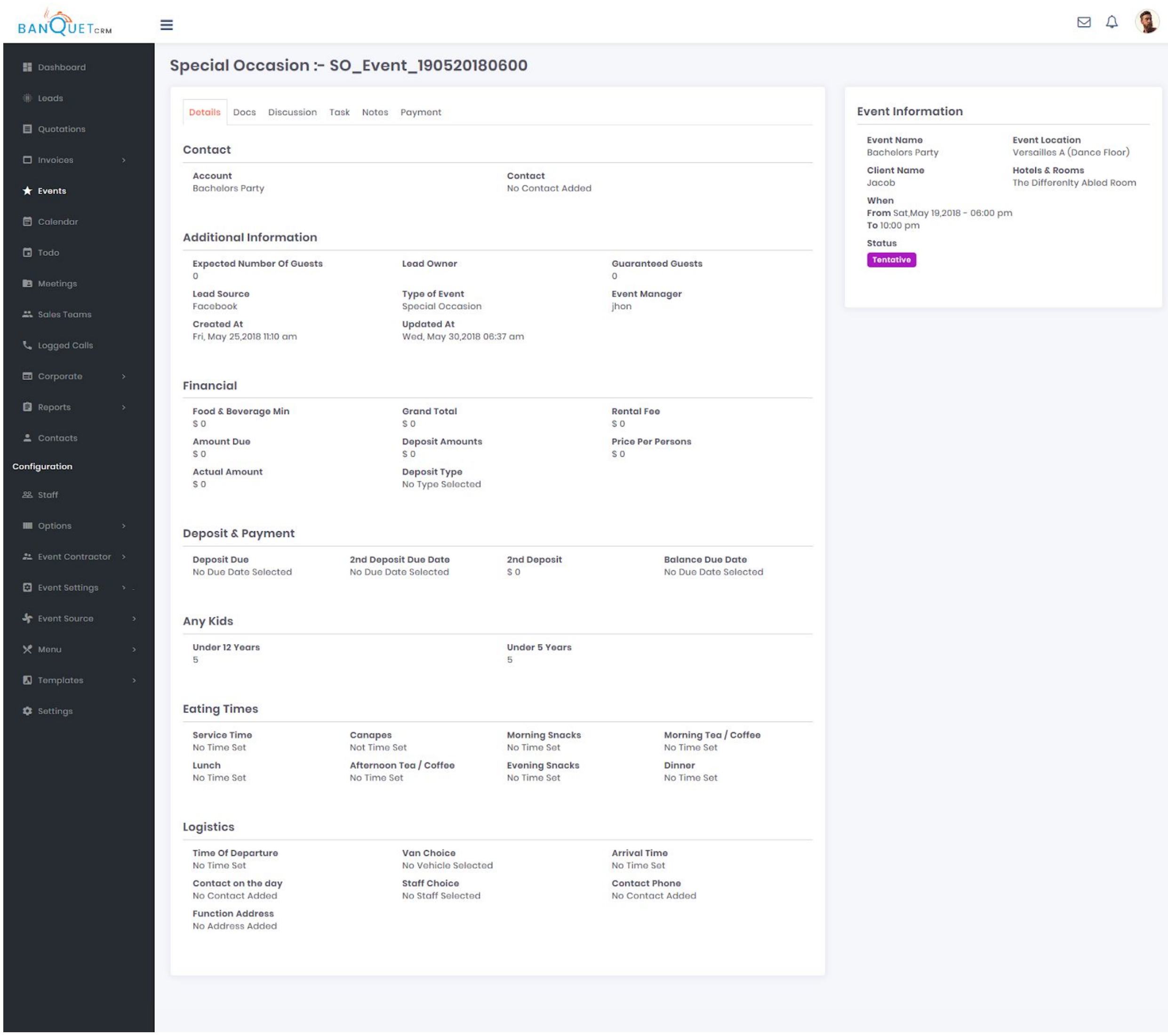
View Event :

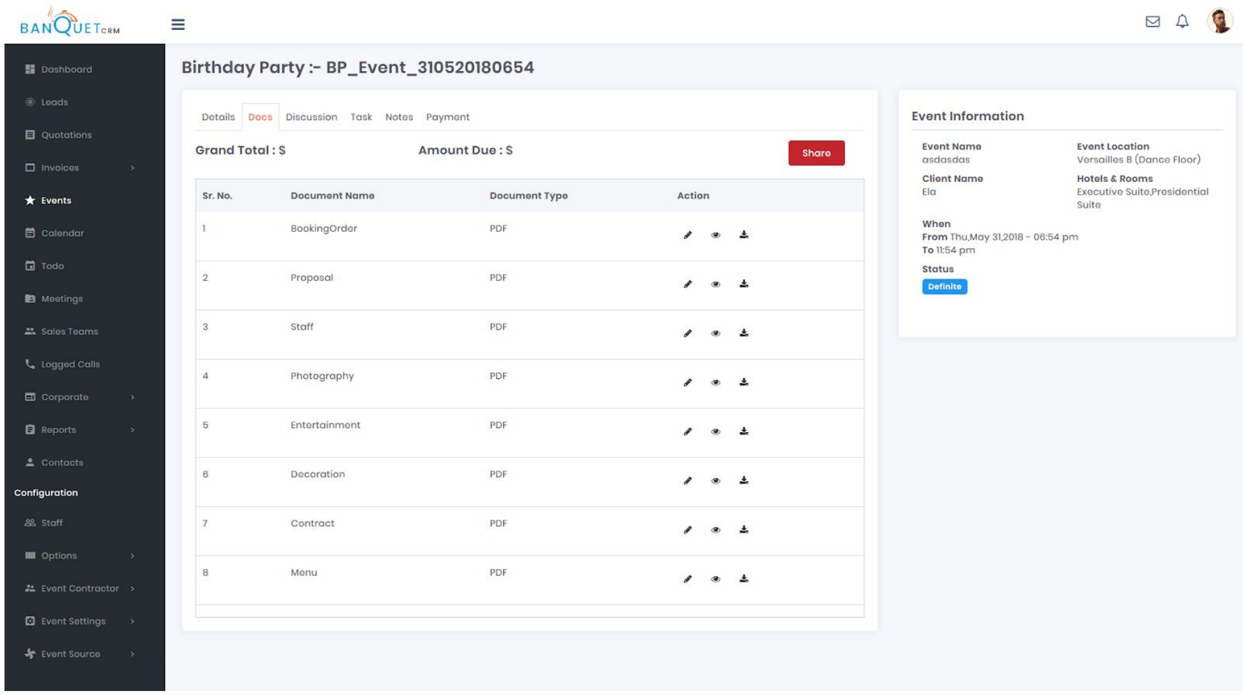
- Click on "VIEW" icon (eye icon) in OPTIONS column to view event’s complete information.
- Here, you can find Details | Docs | Discussion | Task | Notes | Payment tabs.

Details :



- Here, you can have a quick overview of event's complete details.

Docs :



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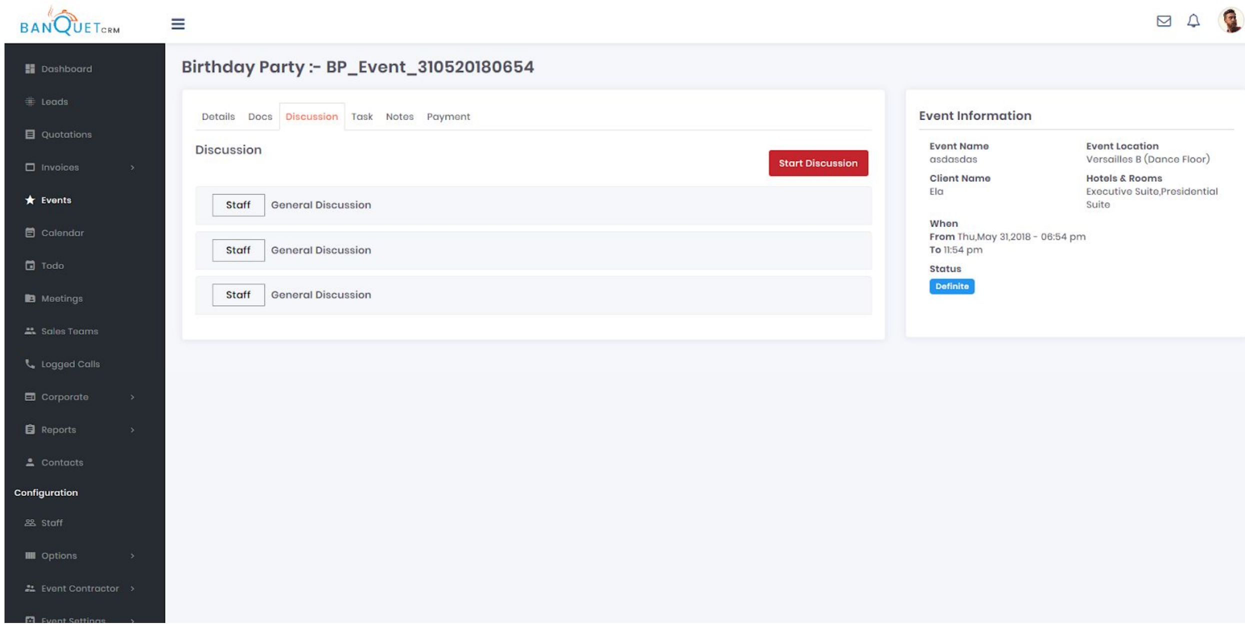
Discussion :



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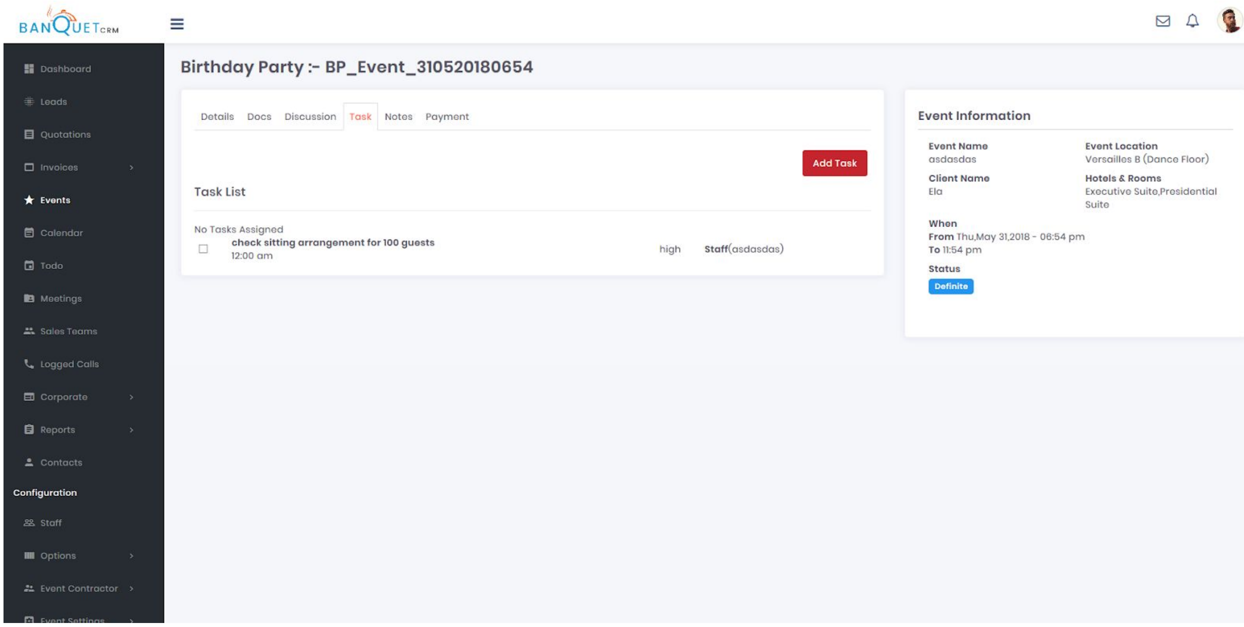
- You can continue discussion with already initiated discussion according to related subject. Or you can start discussion on new subject by clicking on "START DISCUSSION" button.
- By clicking on "START DISCUSSION" button, one popup will open. Where you can enter discussion subject, description, select recipients and you can upload any file related to that discussion.

Task :

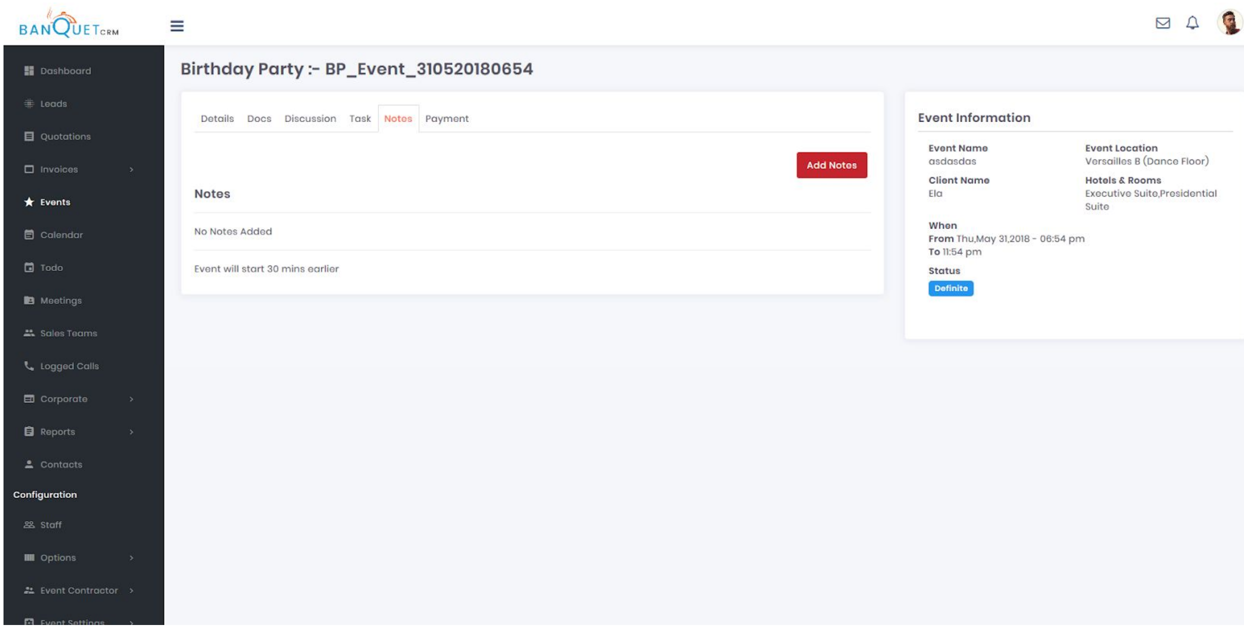


- Click on “Task” tab.

- Here, you can assign task to any staff members by clicking on “ADD TASK”.

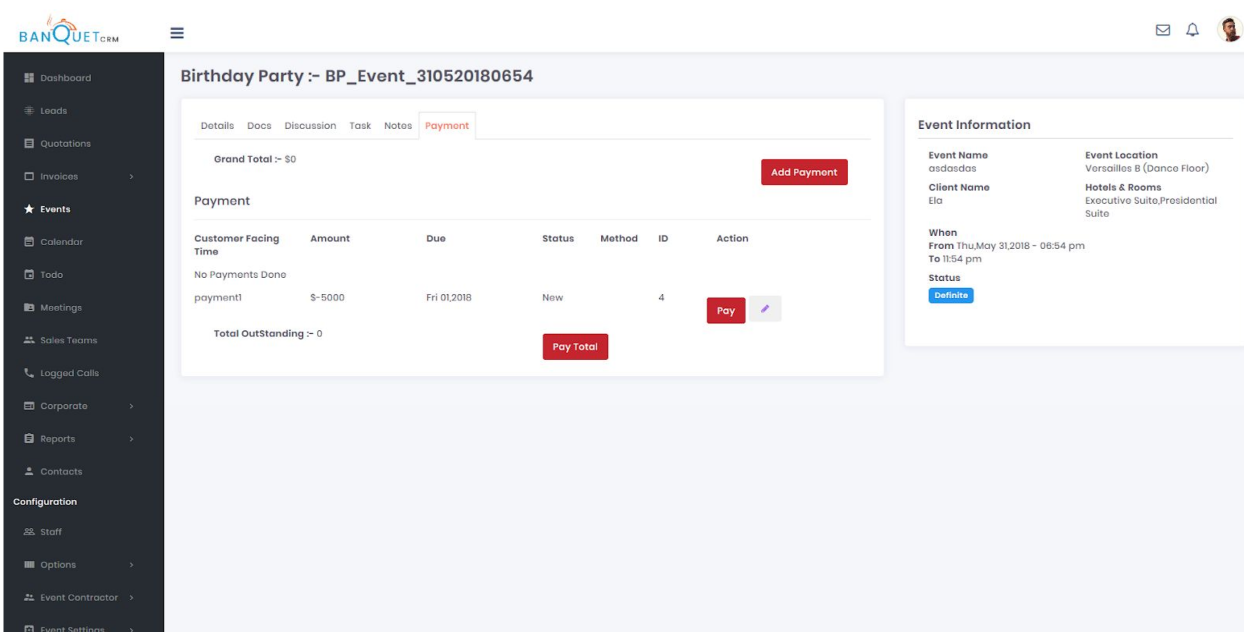
- By clicking on “ADD TASK” button, one popup will open. Where you can enter task description, associated to which event, assignees to whom task is supposed to assign, task deadline and task priority.

Notes :



- Click on “Notes” tab.
- Here, you can add notes related to event.

Payments :



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- You can do payment process from “ACTION” column. There are 3 options 1. Request Payment, 2. Pay and 3. Edit
- Even you can add a new payment through “ADD PAYMENT” button. By clicking on it one pop up will open. Where you can select which amount to be paid from the dropdown or you can create custom amount to be paid and enter customer facing title for that payment, its due date and can add some internal note. Then click on "SAVE" to save the payment or click on "CANCEL" to ignore.

Delete Event :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular event.

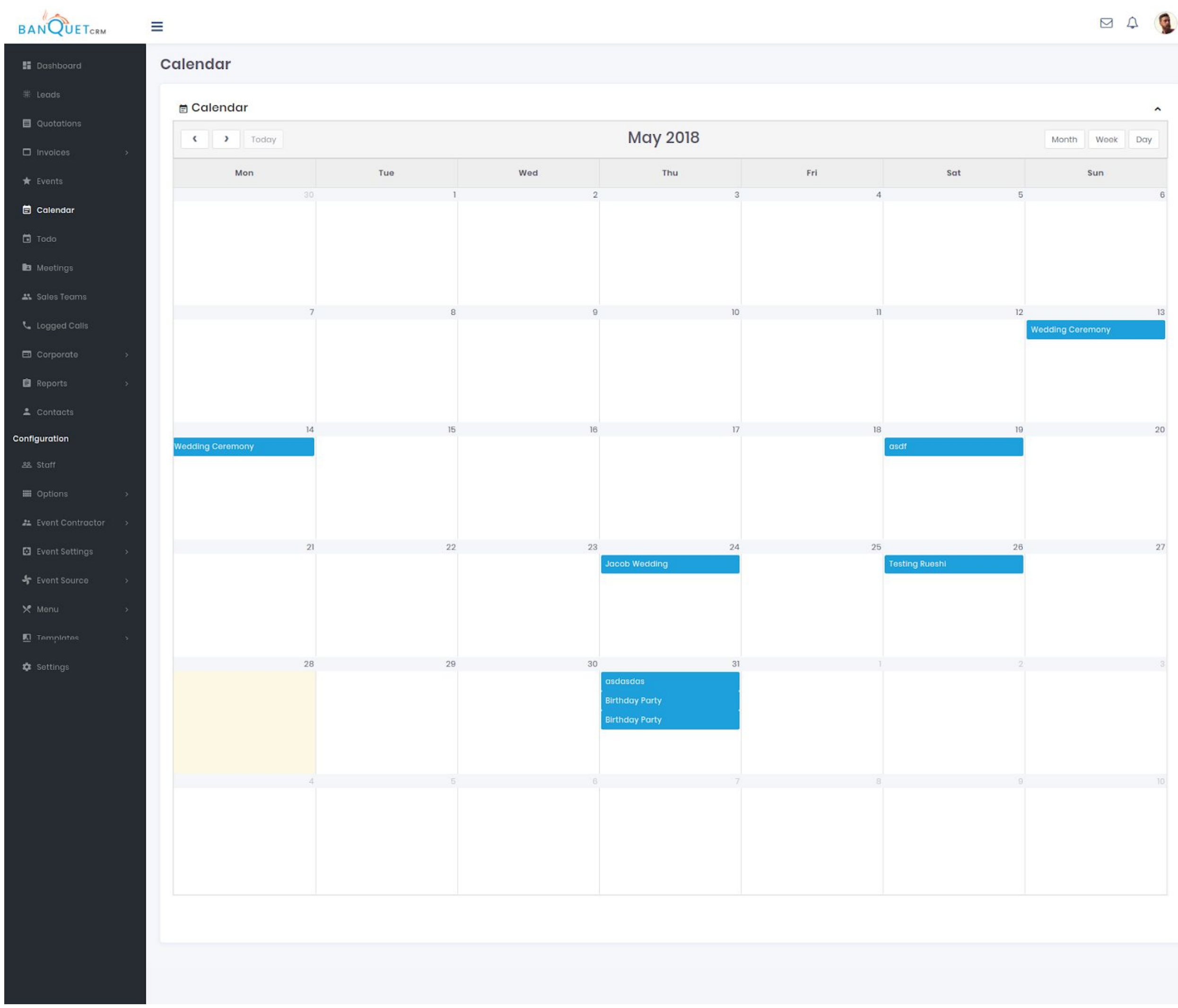
Create New Event :

http://banquetcrm.kintudesigns.com/event/create#/

- Click on “CREATE EVENT” button to create new event. Once you click on “CREATE EVENT” one form will open where you can fill all the necessary information. You can skip some sections in event form by clicking on checkbox for “DO IT LATER” and then click on “SAVE” button at the bottom of the page to save the data or click on “CANCEL” button to ignore it.

CALENDAR

http://banquetcrm.kintudesigns.com/calendar#/



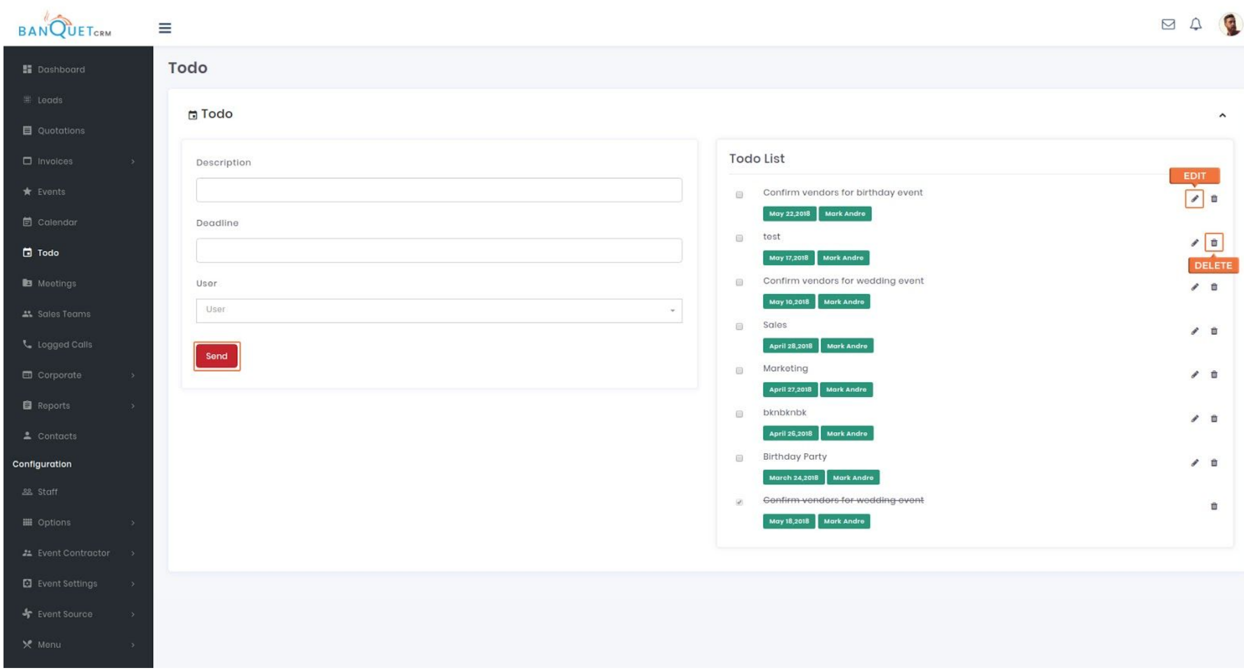
- Here, you can view all the events generated in calendar view.

- By default it will show current month events in calendar. You can filter them by Month / Week / Day.

- You can also make changes to any event by clicking on it.

TO-DOs

http://banquetcrm.kintudesigns.com/task#/



- Here, you can create a to-do-list for any staff members. These tasks will not be related to any event, it would be general. Fill up task description, assignees, due date, priority and then click on "SEND" button.
- Once you click on "SEND" button that task will be assigned to particular staff member.
- You can view the list of all the tasks assigned with due date and assignees name.
- You can EDIT / DELETE any particular task from the list.

EDIT Task :

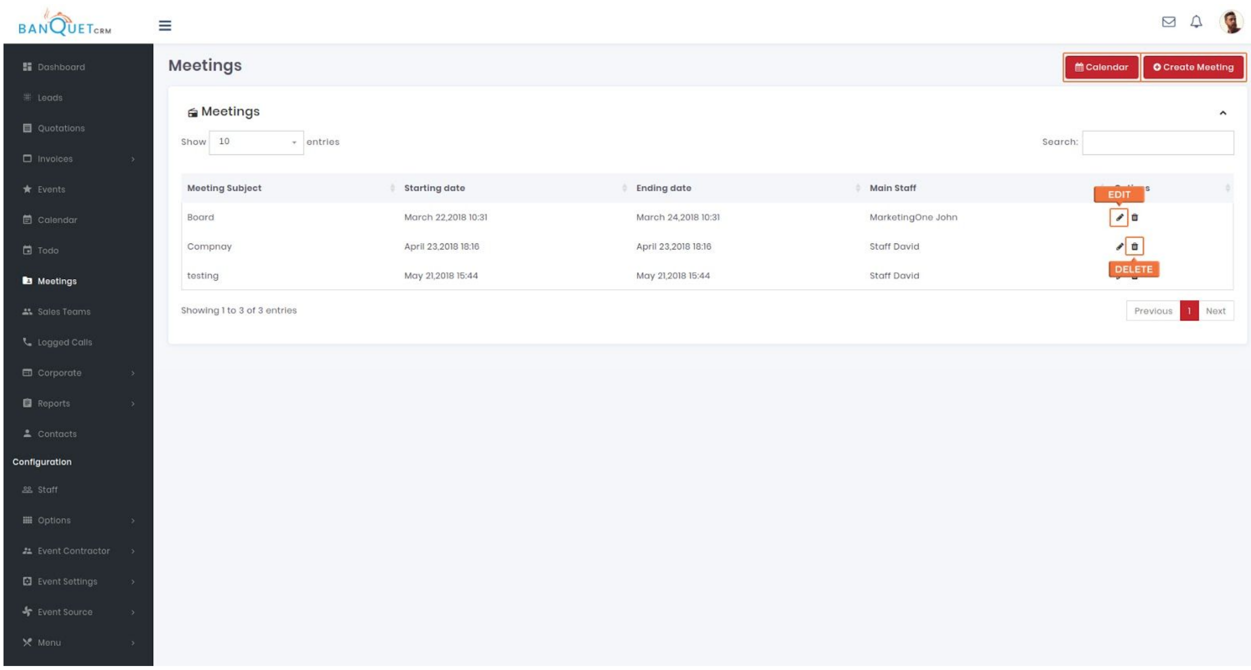
- Click on "EDIT" icon to edit task, change the description and then click on "SAVE" icon to save changes.

DELETE Task :

- Click on "DELETE" icon to delete task.

MEETING

http://banquetcrm.kintudesigns.com/meeting#/



- Here, you can view the list of meetings arranged.

- You can also view meetings arranged in calendar view by clicking on "CALENDAR" button. By default it will show current month events in calendar. You can filter them by Month / Week / Day.

- From calendar view of meetings you can toggle to list view by clicking on "LIST" button.

- EDIT / VIEW / DELETE - meeting through OPTIONS.

Edit Meeting :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular meeting.
- By clicking on "EDIT" icon, edit meeting page will open. Here, you can make necessary changes in the meeting details. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Meeting :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view meeting details.

Delete Meeting :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular meeting arranged.

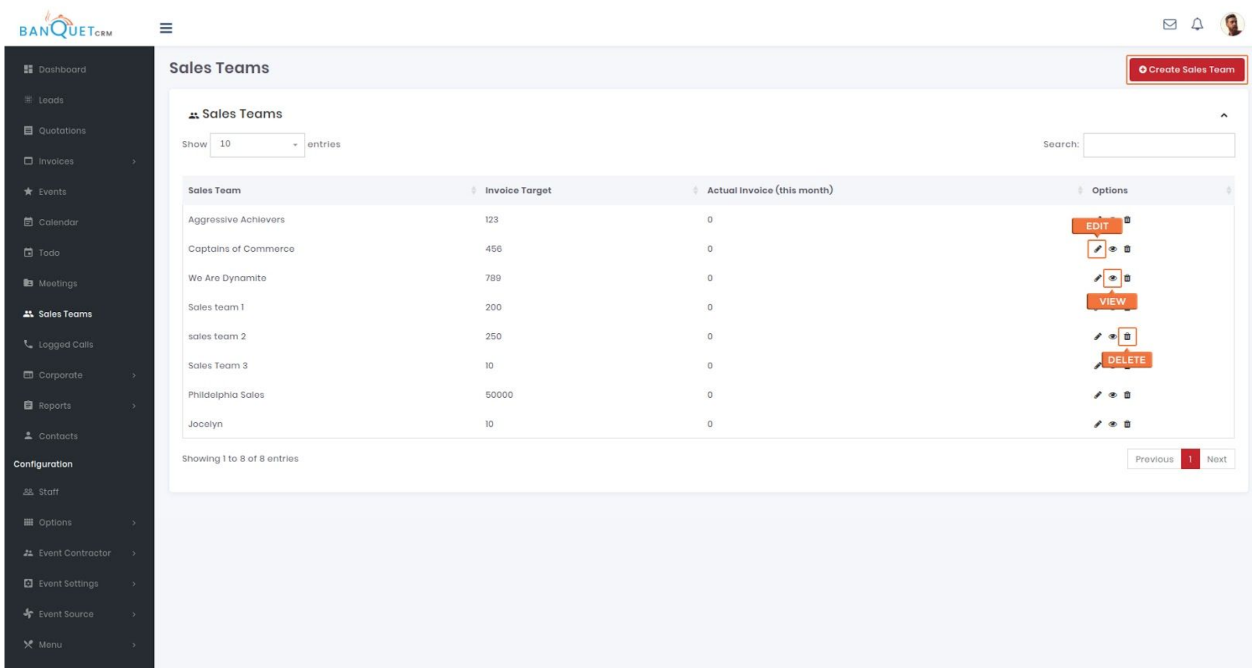
Create Meeting :

http://banquetcrm.kintudesigns.com/meeting/create#/

- Click on “CREATE MEETING” button to create new event.
- Once you click on “CREATE MEETING” one form will open where you can fill all the necessary information related to meeting. Then click on “OK” button at the bottom of the page to create a meeting or click on “BACK” button to ignore it.

SALES TEAM

http://banquetcrm.kintudesigns.com/salesteam#/



- Here, you can view the list of sales team created.

- Through search box you can search for particular record either by sales team, invoice target, or actual invoice amount.

- EDIT / VIEW / DELETE - sale team through OPTIONS.

Edit Sales Team :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular sales team.

- By clicking on "EDIT" icon, edit sales team page will open. Here, you can make necessary changes in the sales team. Add or remove members to team. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Sales Team :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view sales team details.

Delete Sales Team :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular sales team.

Create Sales Team :

http://banquetcrm.kintudesigns.com/salesteam/create#/

- Click on “CREATE SALES TEAM” button to create new sales team.
- Once you click on “CREATE SALES TEAM” one form will open where you can fill all the information and create a new sales team with a sales target to achieve by clicking on “OK” button or click on “BACK” button to ignore.

Import Sales Team :

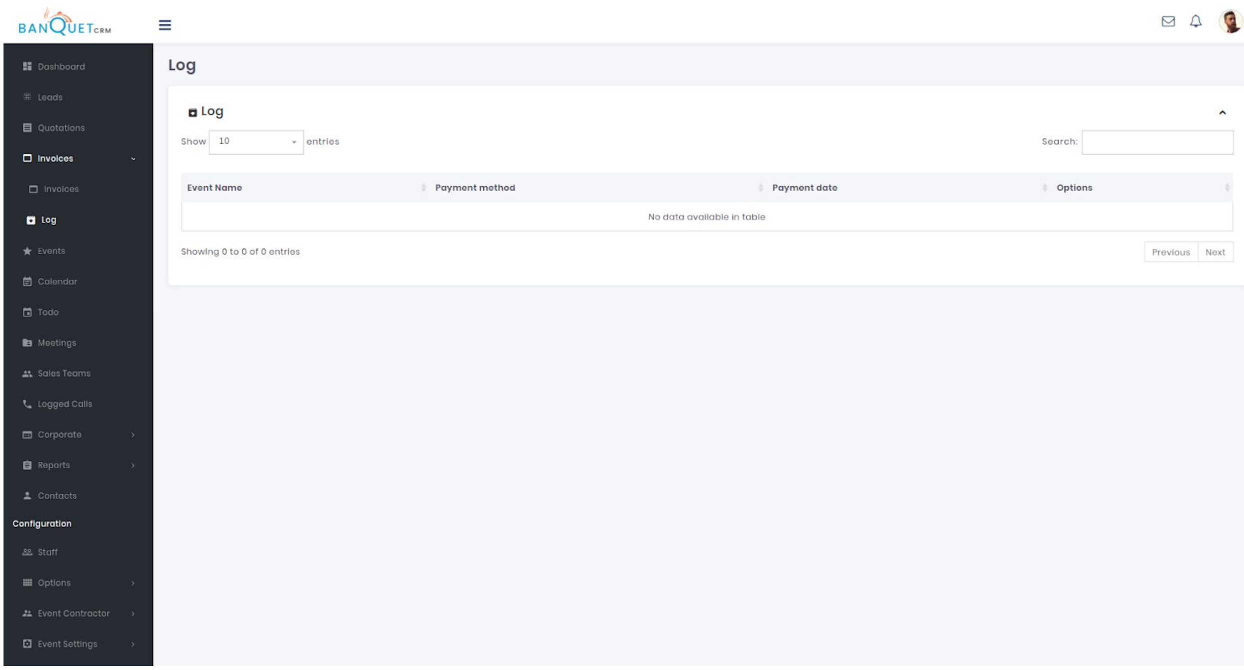
http://banquetcrm.kintudesigns.com/salesteam/import#/

- Import sales team information to create new sales team in bulk using .xlsx sheet. For that first download the template (sales-team.xlsx template) by clicking on "DOWNLOAD TEMPLATE" button, then fill up all informations about sales team in required format and save as the file.
- After filling all the sales team information, upload that (sales-team.xlsx) file by clicking on "SELECT FILE" button, then click on "UPLOAD AND REVIEW" button.

- After clicking on “UPLOAD AND REVIEW” button, all the sales team information you filled in that sheet will be automatically imported and you can review those sales team too.

LOGGED CALLS

http://banquetcrm.kintudesigns.com/call#/



- Here, you can view list of all calls made to qualify a lead.
- EDIT / VIEW / DELETE - call logs through OPTIONS.

Edit Call Log :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular call record of a particular lead.
- By clicking on "EDIT" icon, edit call page will open. Here, you can make necessary changes in lead’s call information. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Call Log :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view call details of a particular lead.

Delete Call Log :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular call log.

Create Call :

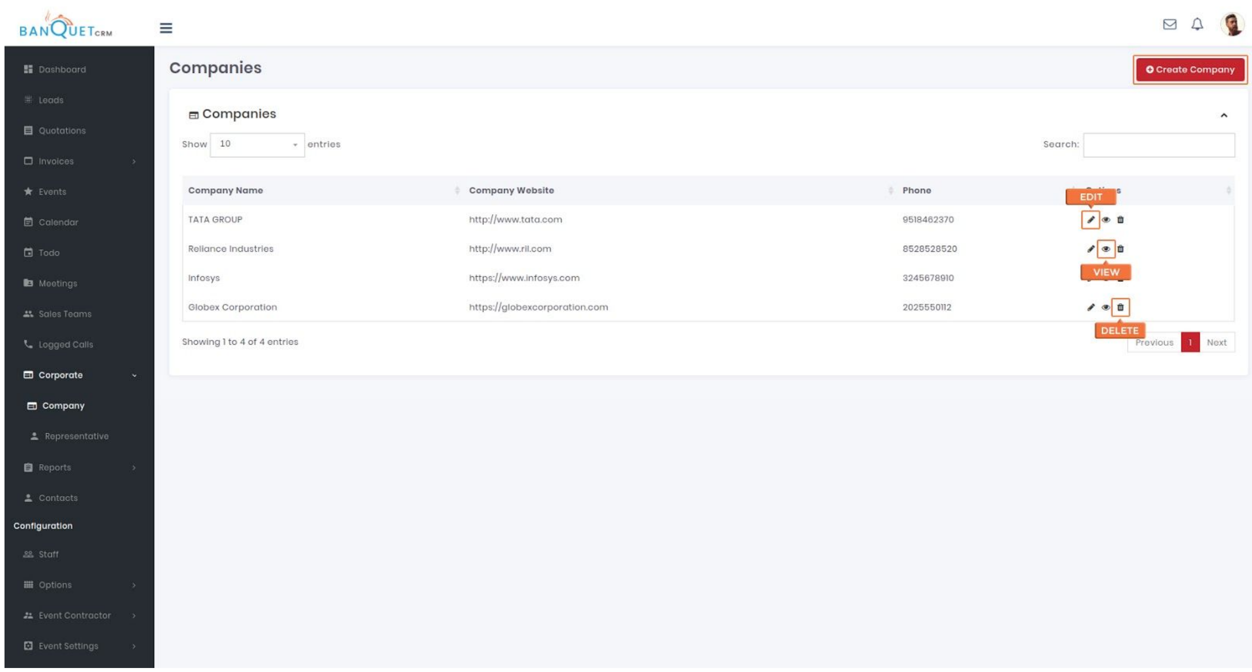
http://banquetcrm.kintudesigns.com/call#/

- Here, you can also create new call details regarding particular lead by clicking on “CREATE CALL” button whenever you make a call.
- Once you click on “CREATE CALL” one form will open where you can fill all the information regarding to lead call. Then click on “OK” button at the bottom of the page to create new call record of a lead or click on “BACK” button to ignore.

CORPORATES

Company

http://banquetcrm.kintudesigns.com/company#/



- Here, you can view list of all companies.

- EDIT / VIEW / DELETE - company details through OPTIONS.

Edit Company :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes to particular company information.

- By clicking on "EDIT" icon, edit company page will open. Here, you can make necessary changes in company information. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Company :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view company details.

Delete Company :

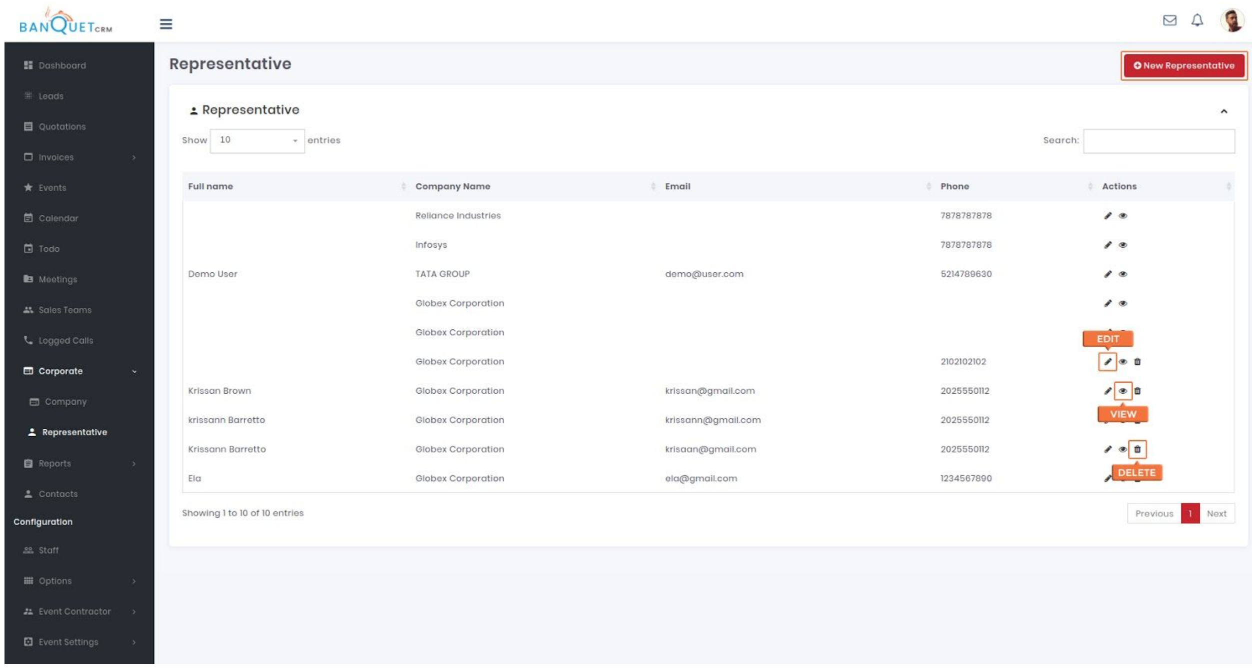
- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular company details.

Create Company :

- Here, you can also create new company details by clicking on “CREATE COMPANY” button.
- Once you click on “CREATE COMPANY” one form will open where you can fill all the information about company, upload company logo. Then click on “OK” button at the bottom of the page to create new company or click on “BACK” button to ignore.

Representative

http://banquetcrm.kintudesigns.com/customer#/



- Here, you can view list of all representatives related to particular company.

- EDIT / VIEW / DELETE - company’s representative details through OPTIONS.

Edit Representative:

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes to particular company’s representative information.

- By clicking on "EDIT" icon, edit representative page will open. Here, you can make necessary changes in company’s representative information. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Representative :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view any company’s representative details.

Delete Representative :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular company’s representative details.

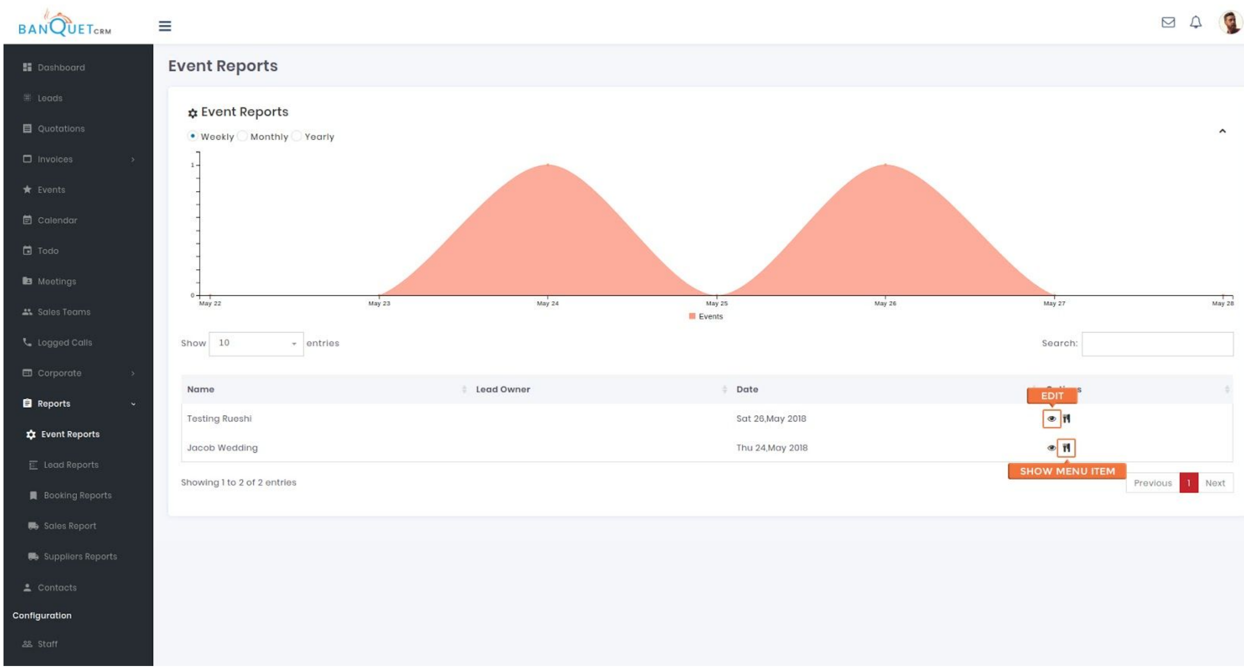
Create Representative :

- Here, you can also create new Representative for a particular company by clicking on “CREATE REPRESENTATIVE” button.
- Once you click on “CREATE REPRESENTATIVE” one form will open where you can fill all the information about representative, upload representative profile pic. Then click on “OK” button at the bottom of the page to create new company or click on “BACK” button to ignore.

REPORTS

Event Reports

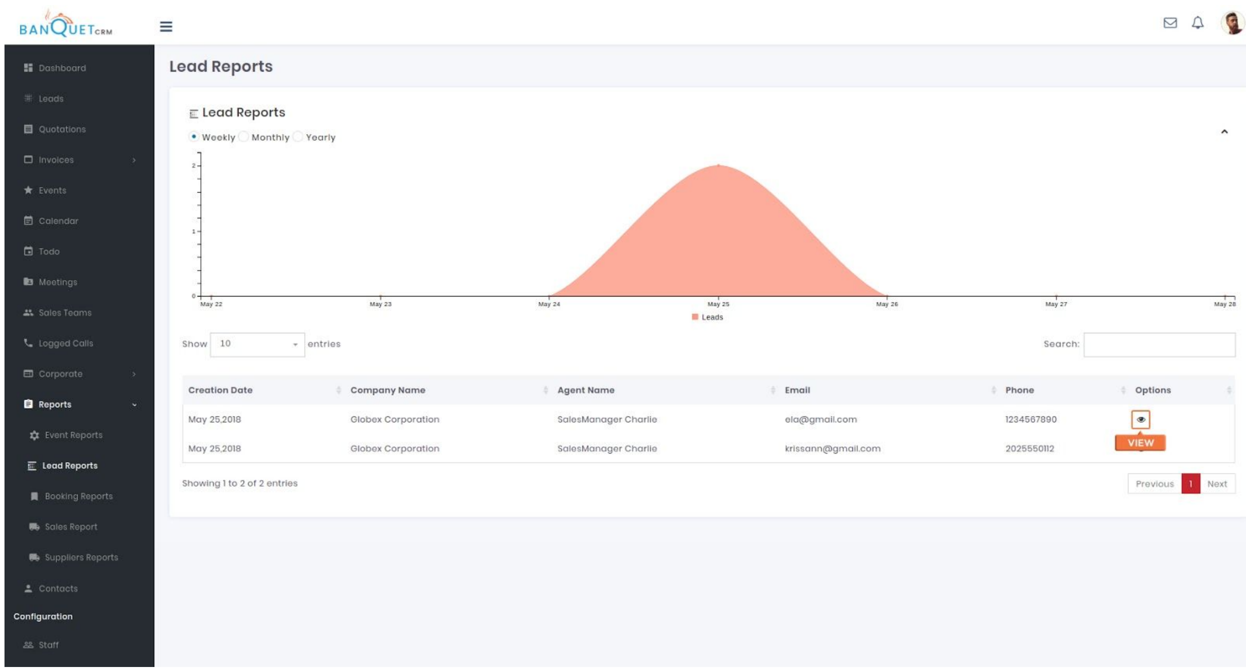
http://banquetcrm.kintudesigns.com/eventReport#/



- Here, you can view event report in graphical presentation. You can apply weekly / monthly / yearly filters to this graph for exact report.
- You can view overview of events in table format too with event name, lead owner and event date & time, event information & event food menu.
- Click on "VIEW" icon (eye icon) in OPTIONS column to view event information like - event details, event related documents, discussion regarding an event, tasks assigned for an event, any special notes, and payment details of an event.

Lead Reports

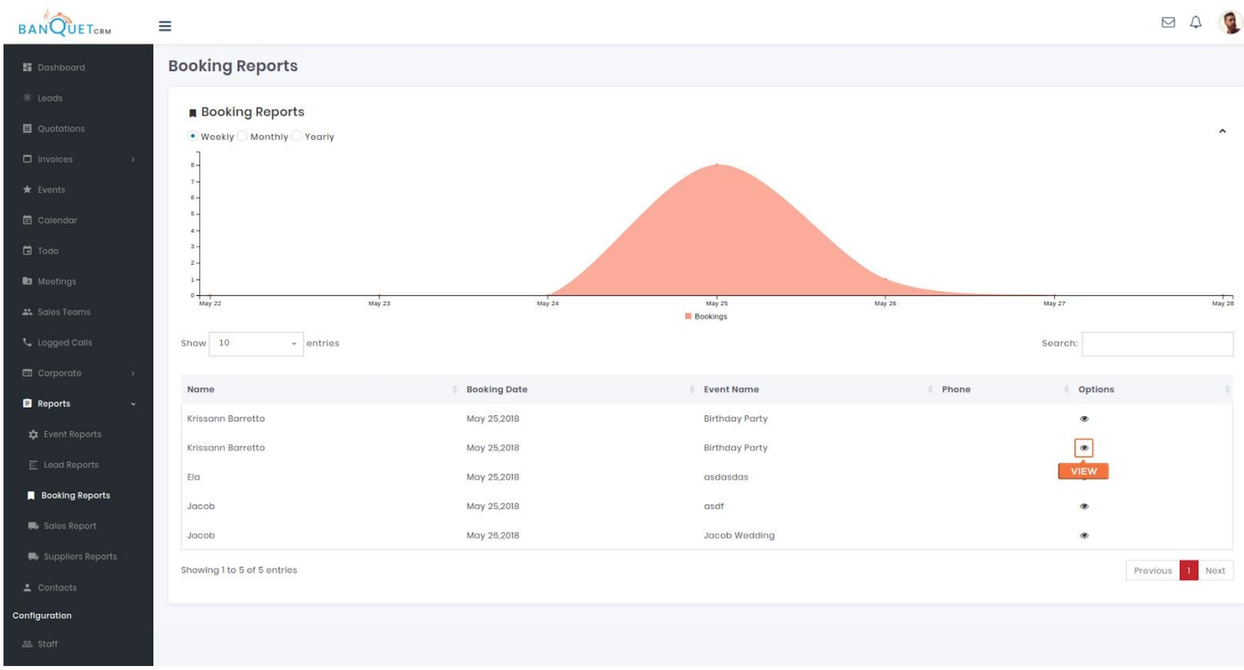
http://banquetcrm.kintudesigns.com/leadReport#/



- Here, you can view lead report in graphical presentation. You can apply weekly / monthly / yearly filters to this graph for exact report.
- You can view overview of leads in table format too with company name, company representative name and his contact information.
- Click on "VIEW" icon (eye icon) in OPTIONS column to view lead information like - lead details, event informations like event type, location, date and time of an event.

Booking Reports

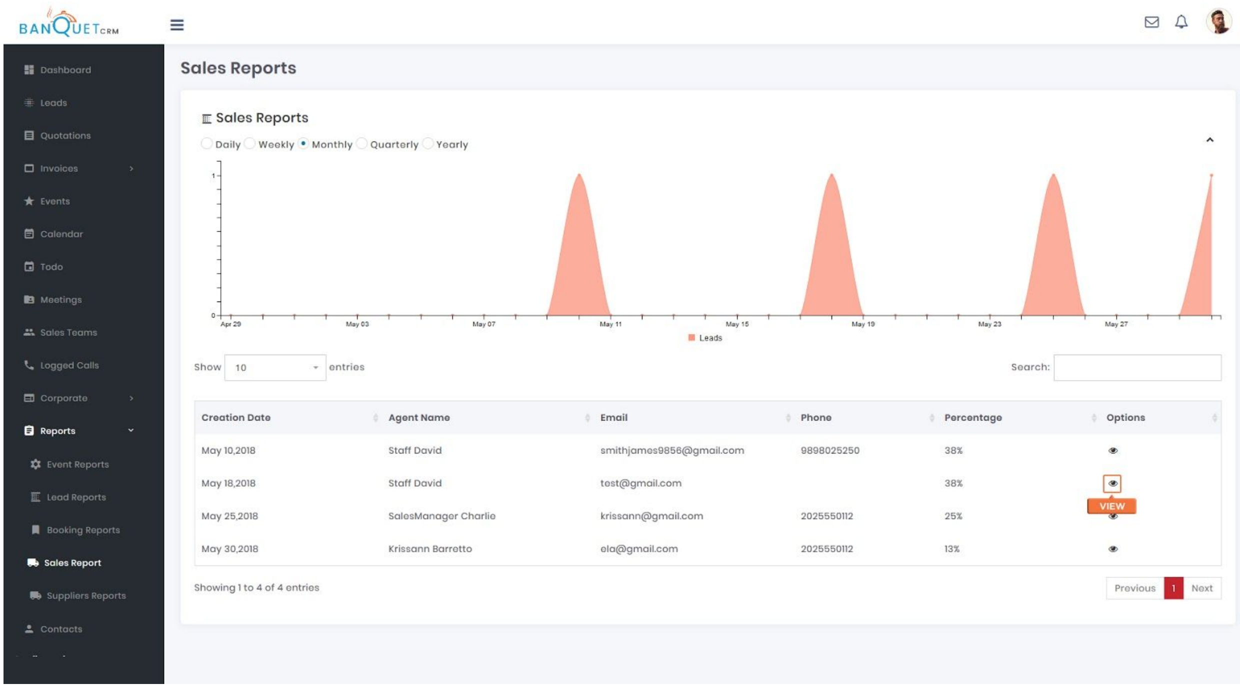
http://banquetcrm.kintudesigns.com/bookingReport#/



- Here, you can view event booking report in graphical presentation. You can apply weekly / monthly / yearly filters to this graph for exact report.
- You can view overview of events booked in table format too with company name, company representative name and his contact information, event type, event date & time, and event location.
- Click on "VIEW" icon (eye icon) in OPTIONS column to view event booking information like - event details, event related documents, discussion regarding an event, tasks assigned for an event, any special notes, and payment details of an event.

Sales Reports

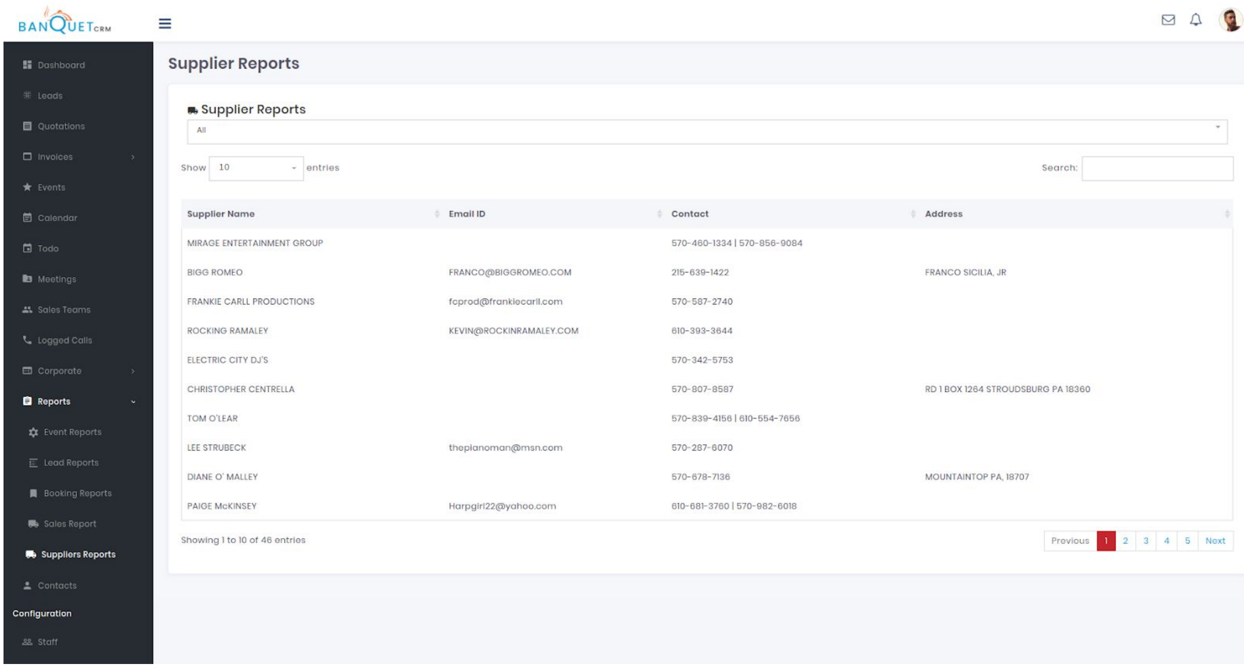
http://banquetcrm.kintudesigns.com/salesReport#/



- Here, you can view sales report in graphical presentation. You can apply weekly / monthly / yearly filters to this graph for exact report.
- You can view overview of leads in table format too with lead owner(agent) name, and his contact information, and percentage of leads covered by particular lead owner(agent).
- Click on "VIEW" icon (eye icon) in OPTIONS column to view lead details like, client name and his contact information, and event information like, event type, event date, time & location.

Supplier Reports

http://banquetcrm.kintudesigns.com/supplierReport#/



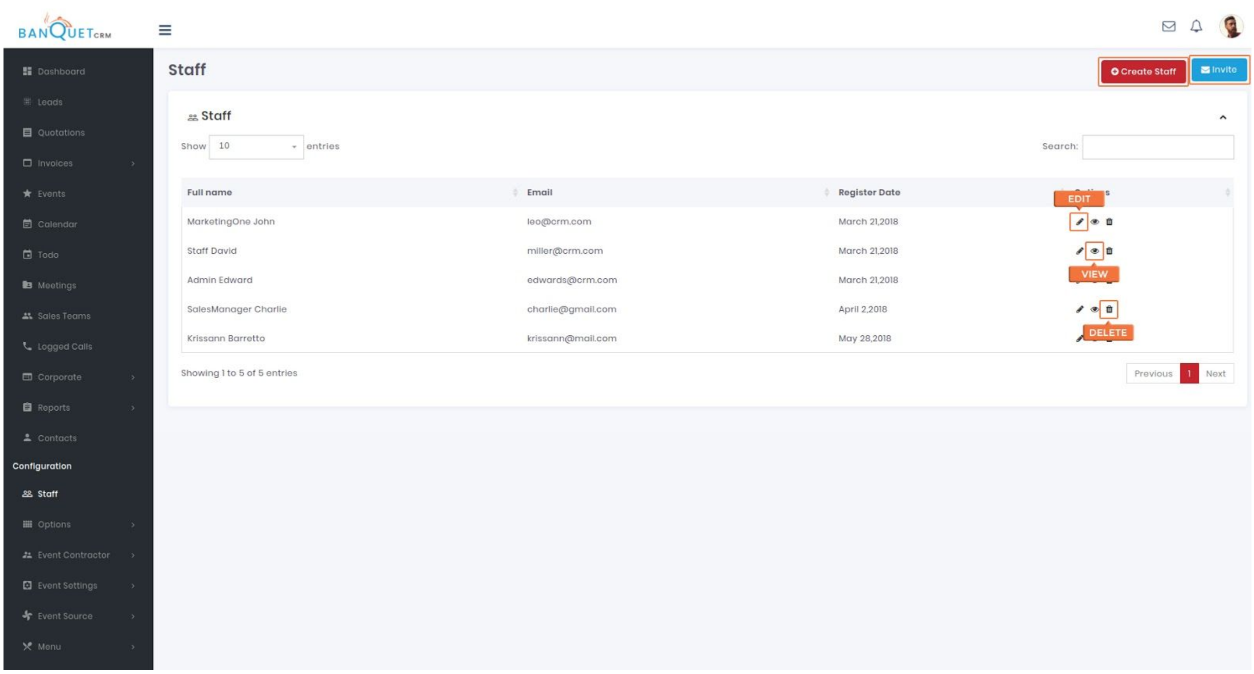
- Here, you can view list of suppliers. You can filter them according to categories - caterer, entertainer, photographer, transport service and decorator for exact records.

- You can view supplier's name, and other contact informations.

CONFIGURATION

1. STAFF

http://banquetcrm.kintudesigns.com/staff#/



- Here, you can view list of all staff members with their department, designation, email id and mobile number.

Edit Staff :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes in particular staff member’s detail.
- By clicking on "EDIT" icon, edit staff page will open. Here, you can make necessary changes in the staff member details.
- Moreover, you can set special permission to staff’s access. Then click on “OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Staff :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view staff members details and his access permissions.

Delete Staff :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular staff member.

Create Staff :

http://banquetcrm.kintudesigns.com/staff/create#/

- Click on “CREATE STAFF” button to create new staff member.
- Once you click on “CREATE STAFF” one form will open where you can fill member’s details and set access permission for that particular staff member. Then click on “OK” button to create staff or click on “BACK” button to ignore.

Invite Staff :

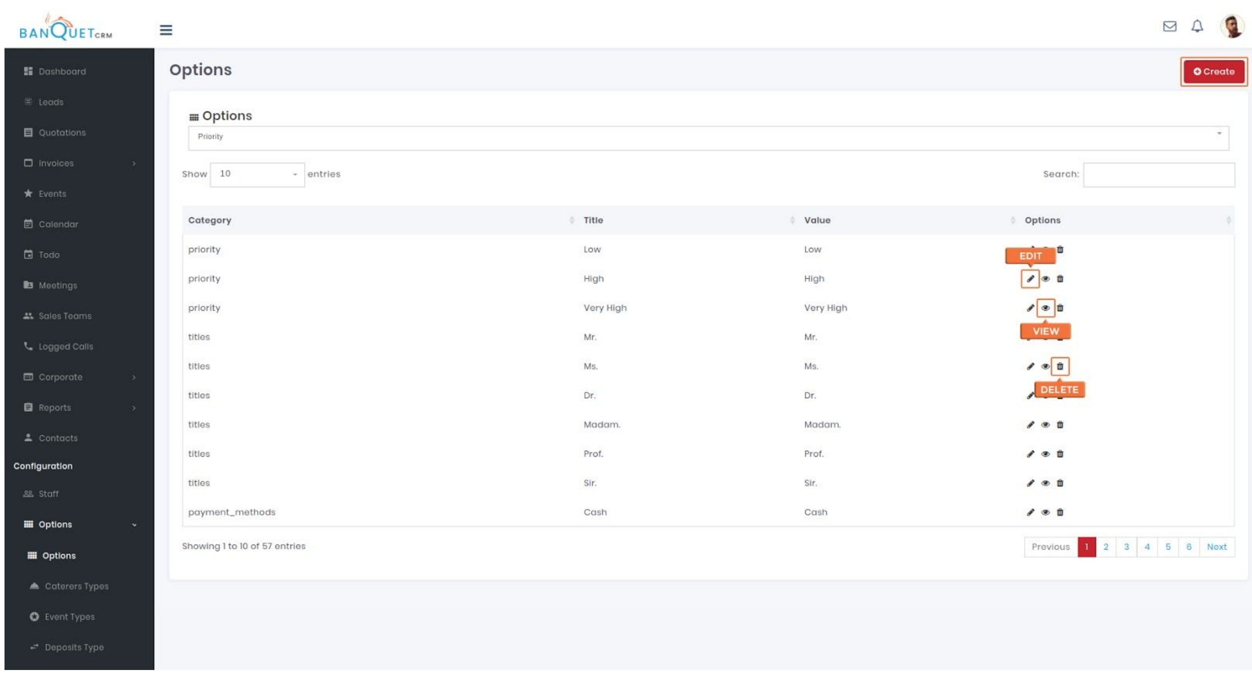
http://banquetcrm.kintudesigns.com/staff/invite#/

- Click on “INVITE STAFF” button to invite staff members. At a time you can enter multiple email ids and invite them all together.
- Then click on “OK” button to send invitation to listed emails or click on “BACK” button to ignore.

2. OPTIONS

Options

http://banquetcrm.kintudesigns.com/option#/



- Here, you can view list of options category with their title and value. And you can filter them category wise too.

Edit Option :

- Click on "EDIT" icon (pencil icon) in OPTIONS column to make any changes to particular option.
- By clicking on "EDIT" icon, edit option page will open. Here, you can make necessary changes in an option like its category, title or value. Then click on

“OK” button at the bottom of the page to save the changes or click on “BACK” button to ignore changes.

View Option :

- Click on "VIEW" icon (eye icon) in OPTIONS column to view option details like its category, title and value.

Delete Option :

- Click on "DELETE" icon (trash icon) in OPTIONS column to delete particular option.

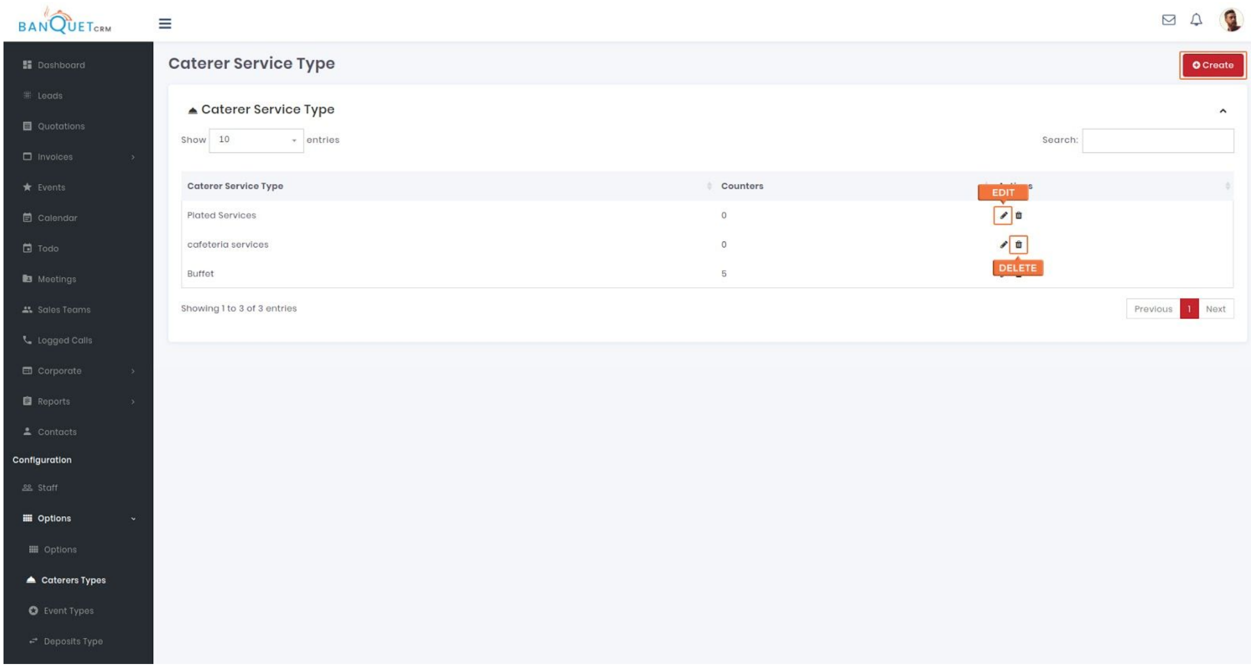
Create Option :

http://banquetcrm.kintudesigns.com/option/create#/

- Here, you can create option by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can select option category and can define title and value for that option. Then click on “OK” button to create new option or click on “BACK” button to ignore.

Caterers Types

http://banquetcrm.kintudesigns.com/eventSetting/catererServiceType#/



- Here, you can view list of caterer service types.

Edit Caterer Service Type :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular caterer service.

- By clicking on "EDIT" icon, edit catering service type page will open. Here, you can edit caterer service type and number of counters. Then click on “ADD” button to save the changes or click on “BACK” button to ignore changes.

Delete Caterer Service Type :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular caterer service type.

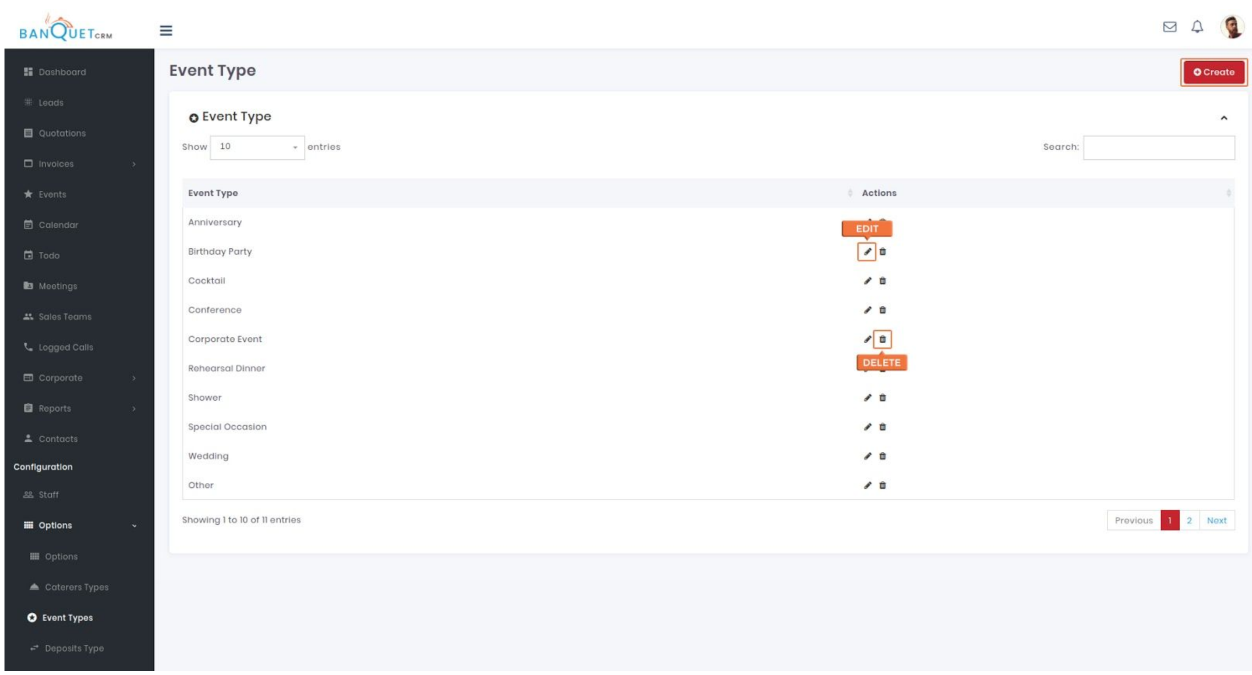
Create Caterer Service Type :

http://banquetcrm.kintudesigns.com/eventSetting/catererTypeCreate#/

- Here, you can create Caterer Service Type by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter caterer service type and number of counters. Then click on “ADD” button to create new caterer service type or click on “BACK” button to ignore.

Event Types

http://banquetcrm.kintudesigns.com/eventSetting/eventTypes#/



- Here, you can view list of event types.

Edit Event Type :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular event type.

- By clicking on "EDIT" icon, edit event type page will open. Here, you can edit event type. Then click on “ADD” button to save the changes or click on “BACK” button to ignore changes.

Delete Event Type :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular event type.

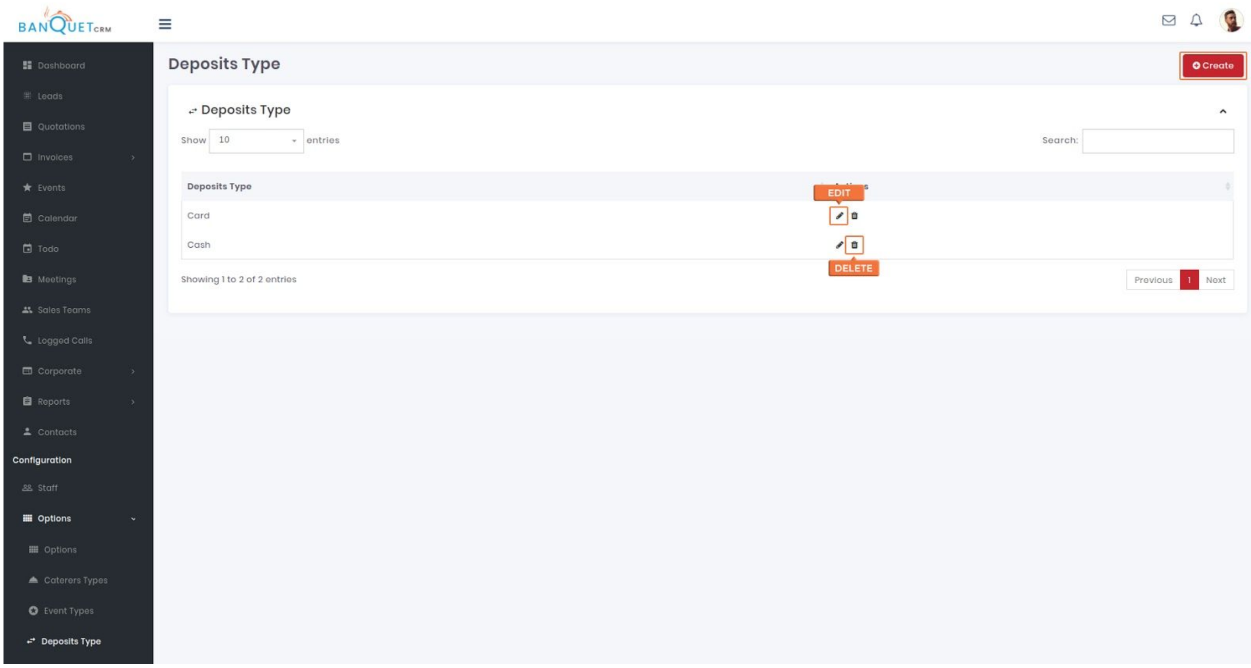
Create Event Type :

http://banquetcrm.kintudesigns.com/eventSetting/eventTypeCreate#/

- Here, you can create new event type by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter event type. Then click on “ADD” button to create new event type or click on “BACK” button to ignore.

Deposits Types

http://banquetcrm.kintudesigns.com/eventSetting/depositsType#/



- Here, you can view list of deposit types.

Edit Deposit Type :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular deposit type.
- By clicking on "EDIT" icon, edit deposit type page will open. Here, you can edit deposit type. Then click on “ADD” button to save the changes or click on “BACK” button to ignore changes.

Delete Deposit Type :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular deposit type.

Create Deposit Type :

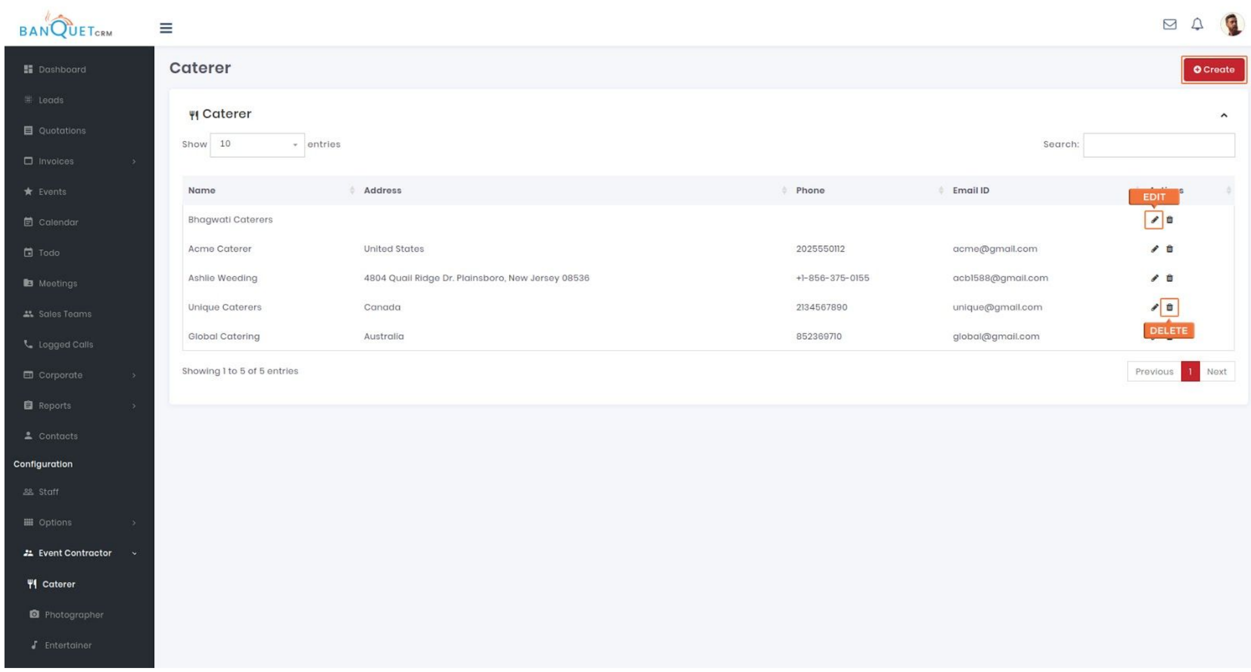
http://banquetcrm.kintudesigns.com/eventSetting/depositsTypeCreate#/

- Here, you can create new deposit type by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter deposit type. Then click on “ADD” button to create new deposit type or click on “BACK” button to ignore.

3. EVENT CONTRACTOR

Caterer

http://banquetcrm.kintudesigns.com/eventSetting/catererIndex#/



- Here, you can view list of all caterers with their contact information.

Edit Caterer :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular caterer details.
- By clicking on "EDIT" icon, edit caterer page will open. Here, you can edit caterer details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Caterer :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular caterer.

Create Caterer :

http://banquetcrm.kintudesigns.com/eventSetting/catererCreate#/

- Here, you can create new caterer by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter caterer's all details. Then click on “OK” button to create new caterer or click on “BACK” button to ignore.

Photographer

http://banquetcrm.kintudesigns.com/eventSetting/photoIndex#/

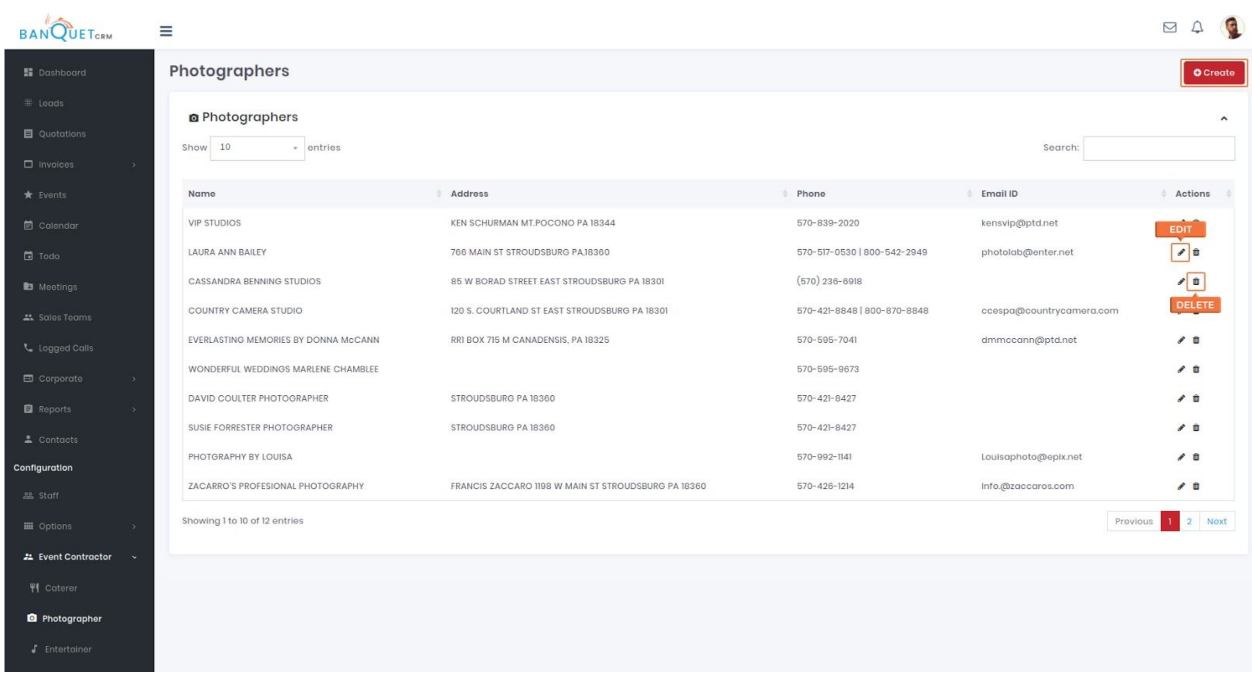
- Here, you can view list of all photographers with their contact information.

Edit Photographer :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular photographer details.
- By clicking on "EDIT" icon, edit photographer page will open. Here, you can edit photographer details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Photographer :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular photographer.



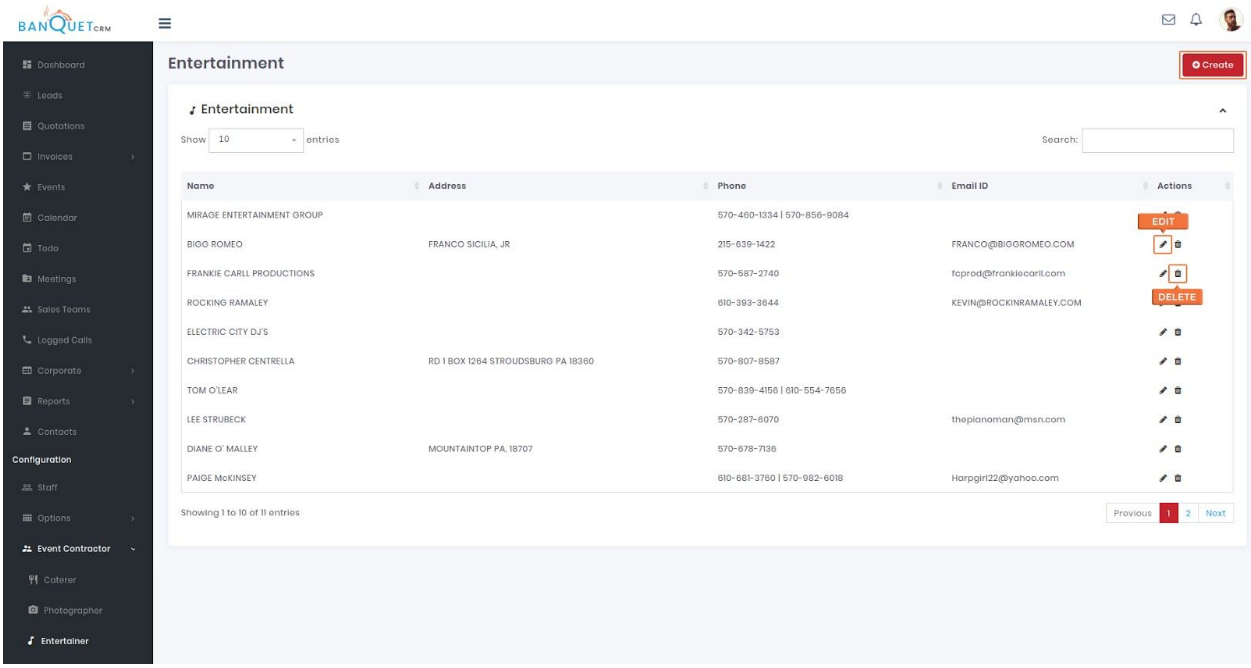
Create Photographer :

http://banquetcrm.kintudesigns.com/eventSetting/photoCreate#/

- Here, you can create new photographer by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter photographer's all details. Also, you can add different packages of photographer.
- You can add terms & conditions of photographer for his services and payments, etc. Then click on “OK” button to create new photographer or click on “BACK” button to ignore.

Entertainer

http://banquetcrm.kintudesigns.com/eventSetting/entertainIndex#/



- Here, you can view list of all entertainment providers with their contact information.

Edit Entertainment :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular entertainment provider details.
- By clicking on "EDIT" icon, edit entertainment provider page will open. Here, you can edit entertainment provider details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Entertainment :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular entertainment provider.

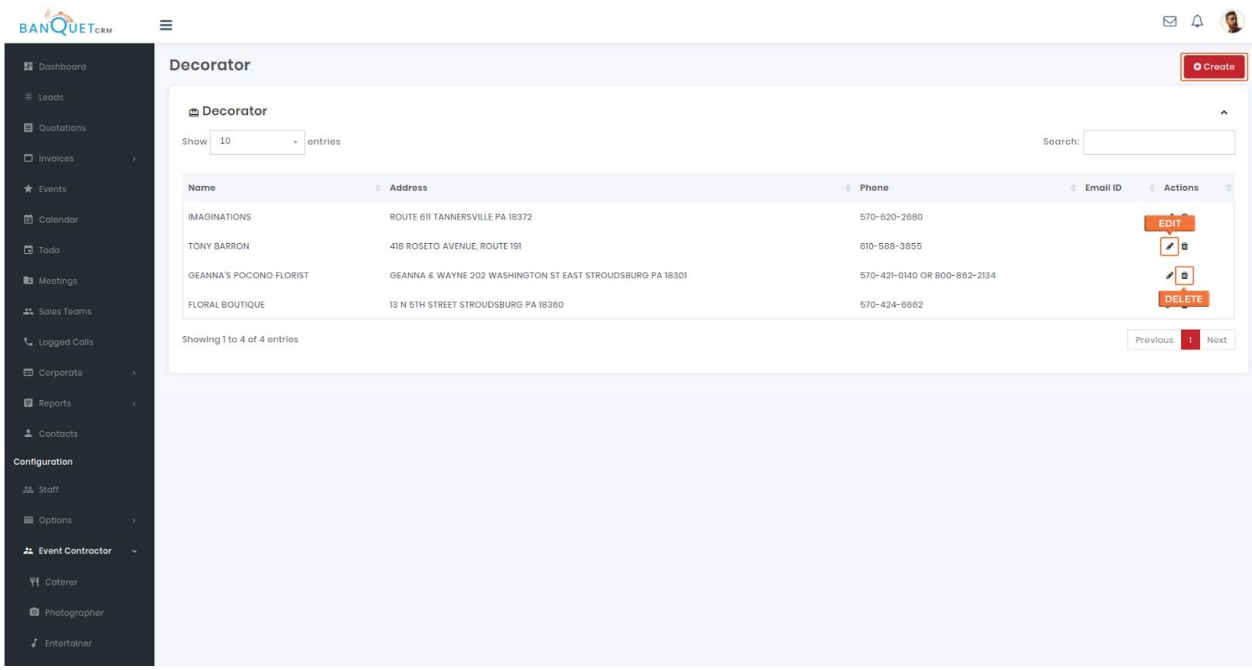
Create Entertainment :

http://banquetcrm.kintudesigns.com/eventSetting/entertainCreate#/

- Here, you can create new entertainment provider by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter entertainment provider's all details. Also, you can add different packages of entertainment provider.
- You can add terms & conditions of entertainment provider for his services, contract and payments, etc. Then click on “OK” button to create new entertainment provider or click on “BACK” button to ignore.

Decorator

http://banquetcrm.kintudesigns.com/eventSetting/decoratorIndex#/



- Here, you can view list of all decorators with their contact information.

Edit Decorator :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular decorator details.
- By clicking on "EDIT" icon, edit decorator page will open. Here, you can edit decorator details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Decorator :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular decorators.

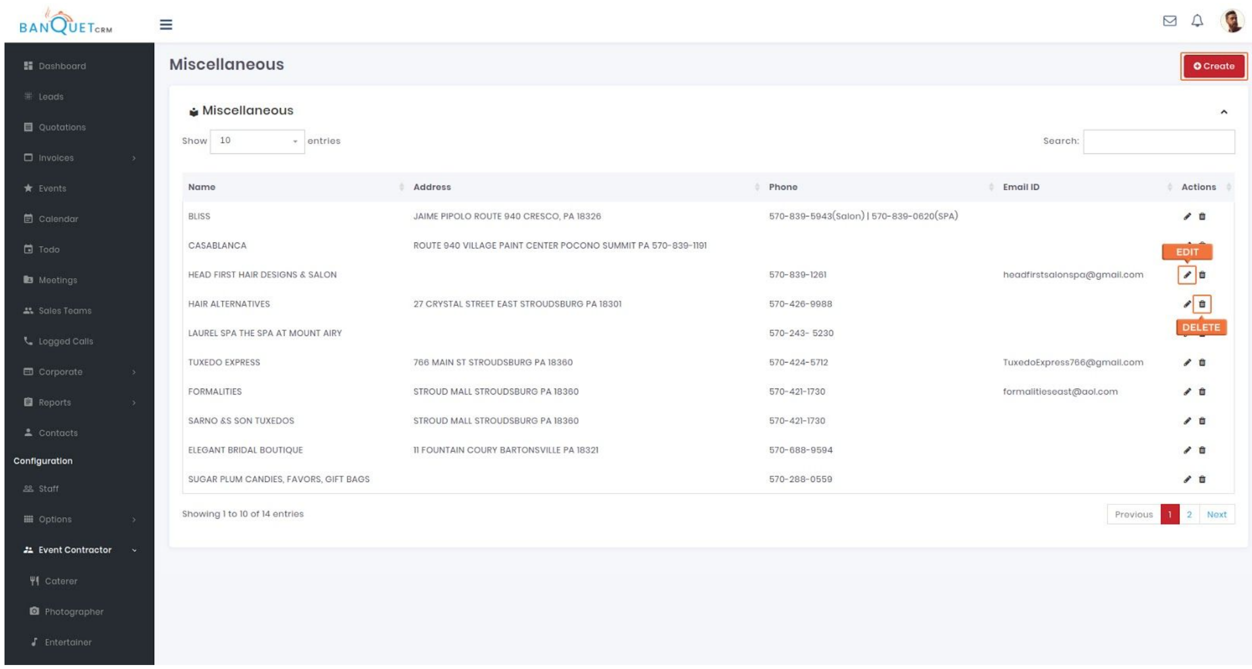
Create Decorator :

http://banquetcrm.kintudesigns.com/eventSetting/decoratorCreate#/

- Here, you can create new decorator by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter decorator's all details. Also, you can add different packages of decorator.
- You can add terms & conditions of decorator for his services, contract and payments, etc. Then click on “OK” button to create new decorator or click on “BACK” button to ignore.

Miscellaneous

http://banquetcrm.kintudesigns.com/eventSetting/miscellaneous#/



- Here, you can view list of all miscellaneous providers with their contact information.

Edit Miscellaneous :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular miscellaneous providers details.
- By clicking on "EDIT" icon, edit miscellaneous provider page will open. Here, you can edit miscellaneous provider details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Miscellaneous :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular miscellaneous provider.

Create Miscellaneous :

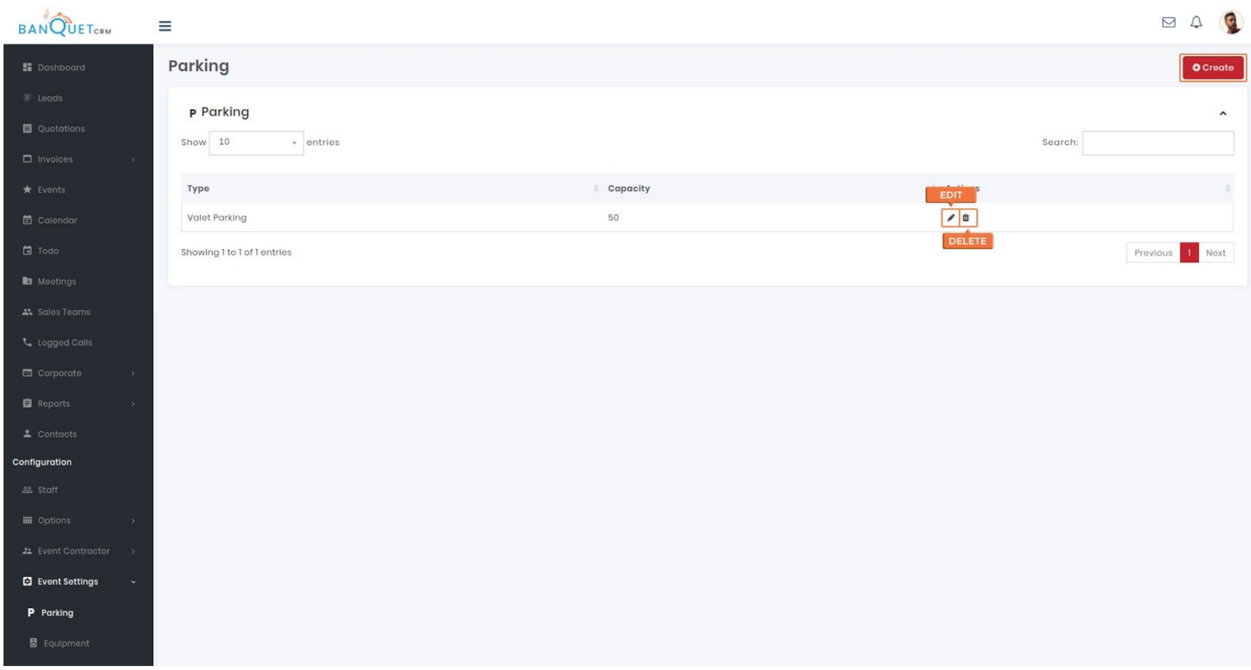
http://banquetcrm.kintudesigns.com/eventSetting/miscellaneousCreate#/

- Here, you can create new miscellaneous provider by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter miscellaneous provider's all details. Also, you can add different packages of miscellaneous providers.
- You can add terms & conditions of miscellaneous provider for his services, contract and payments, etc. Then click on “OK” button to create new miscellaneous provider or click on “BACK” button to ignore.

4. EVENT SETTINGS

Parking

http://banquetcrm.kintudesigns.com/eventSetting/parkingIndex#/



- Here, you can view list of all parking types with their vehicle accomodation capacity.

Edit Parking :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular parking types.
- By clicking on "EDIT" icon, edit parking page will open. Here, you can edit parking details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Parking :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular parking type.

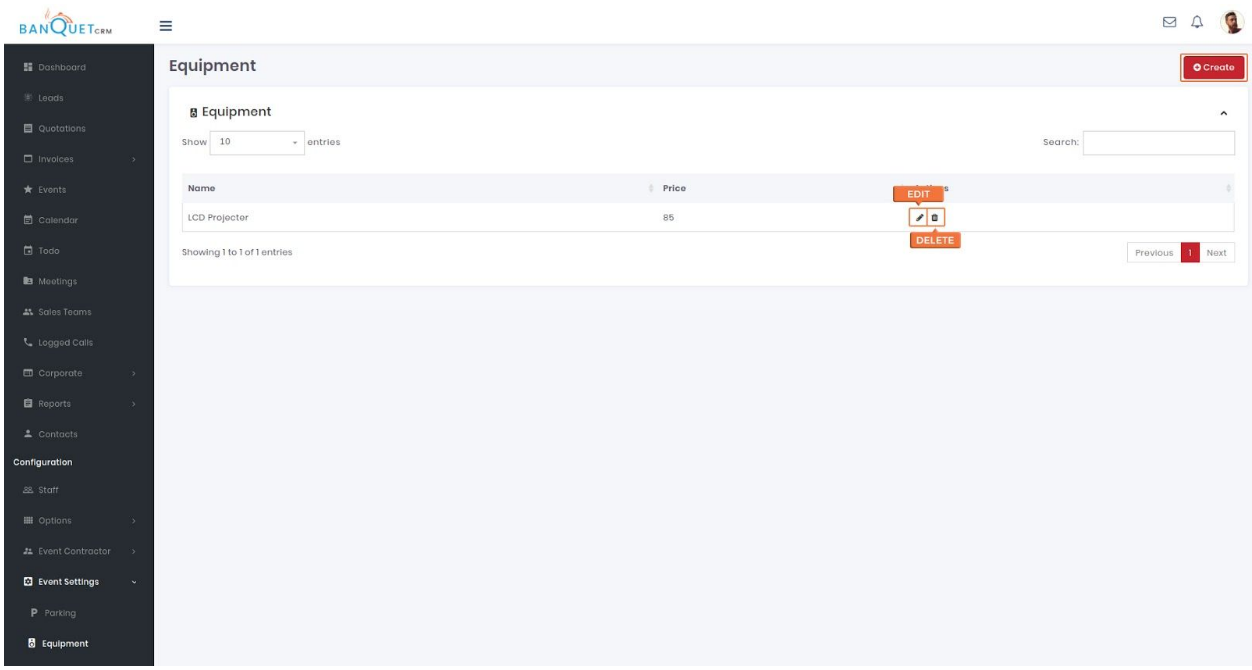
Create Parking :

http://banquetcrm.kintudesigns.com/eventSetting/parkingCreate#/

- Here, you can create new parking type by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter parking type and its capacity. Then click on “OK” button to create new miscellaneous provider or click on “BACK” button to ignore.

Equipment

http://banquetcrm.kintudesigns.com/eventSetting/equipIndex#/



- Here, you can view list of all equipments with their price.

Edit Equipment :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular equipment detail.
- By clicking on "EDIT" icon, edit equipment page will open. Here, you can edit equipment details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Equipment :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular equipment.

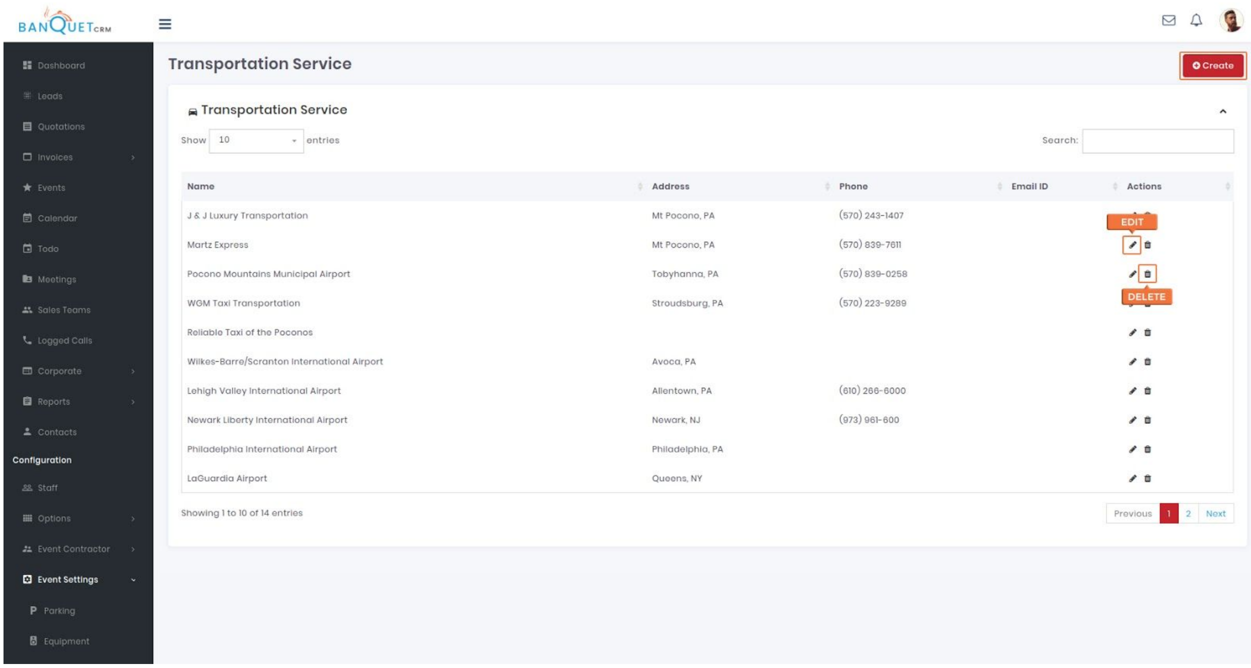
Create Equipment :

http://banquetcrm.kintudesigns.com/eventSetting/equipCreate#/

- Here, you can create new equipment by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter equipment name and its price. Then click on “OK” button to create new equipment or click on “BACK” button to ignore.

Transport Service

http://banquetcrm.kintudesigns.com/eventSetting/transportIndex#/



- Here, you can view list of all transportation service with their contact information.

Edit Transportation Service :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular transportation service detail.
- By clicking on "EDIT" icon, edit transportation service page will open. Here, you can edit transportation service details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Transportation Service :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular transportation service.

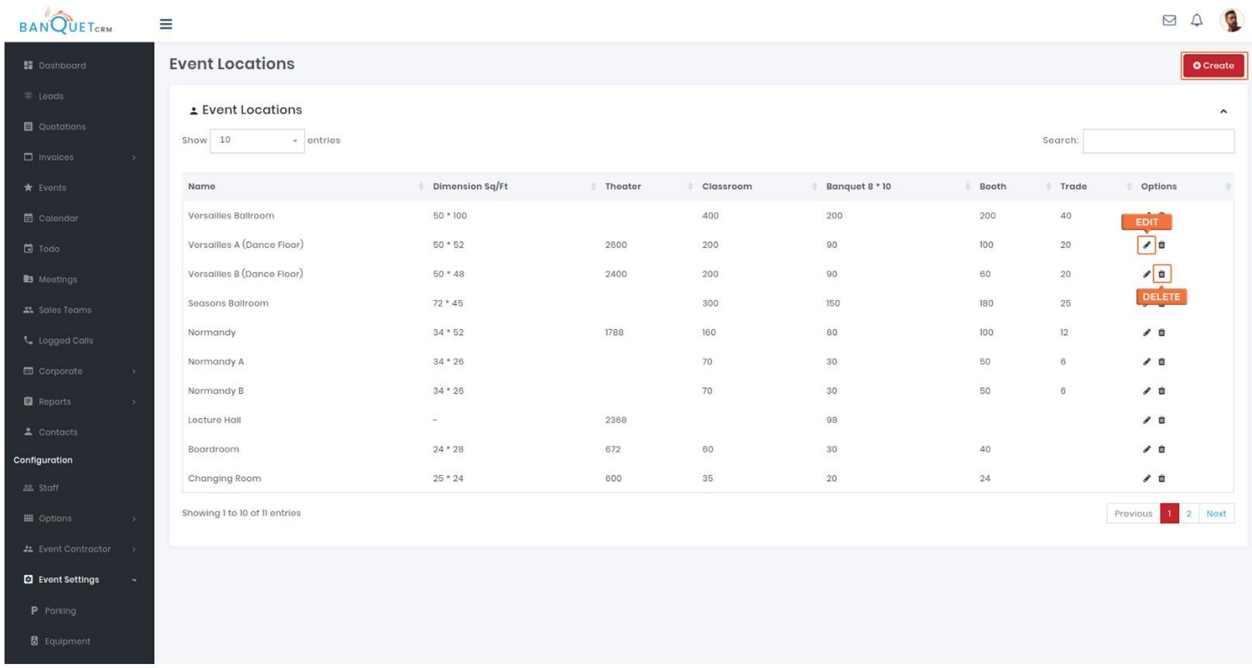
Create Transportation Service :

http://banquetcrm.kintudesigns.com/eventSetting/transportCreate#/

- Here, you can create new transportation service by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter transportation service and its detail. Then click on “OK” button to create new transportation service or click on “BACK” button to ignore.

Event Location

http://banquetcrm.kintudesigns.com/eventSetting/transportIndex#/



- Here, you can view list of all transportation service with their contact information.

Edit Transportation Service :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to make any changes to particular transportation service detail.
- By clicking on "EDIT" icon, edit transportation service page will open. Here, you can edit transportation service details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Transportation Service :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular transportation service.

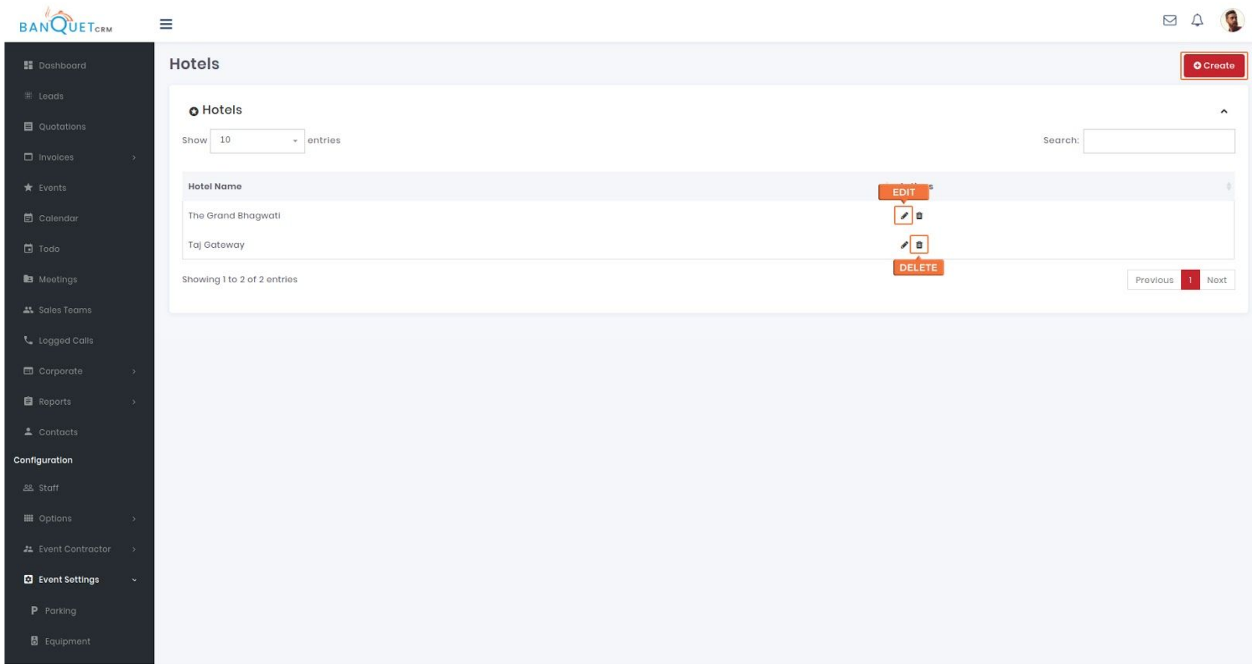
Create Transportation Service :

http://banquetcrm.kintudesigns.com/eventSetting/transportCreate#/

- Here, you can create new transportation service by clicking on "CREATE" button.
- Once you click on "CREATE" one form will open where you can enter transportation service and its detail. Then click on "OK" button to create new transportation service or click on "BACK" button to ignore.

Hotels

http://banquetcrm.kintudesigns.com/eventSetting/hotel#/



- Here, you can view list of all hotels.

Edit Hotel :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular hotel name.
- By clicking on "EDIT" icon, edit hotel page will open. Here, you can edit hotel. Then click on “ADD” button to save the changes or click on “BACK” button to ignore changes.

Delete Hotel :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular hotel.

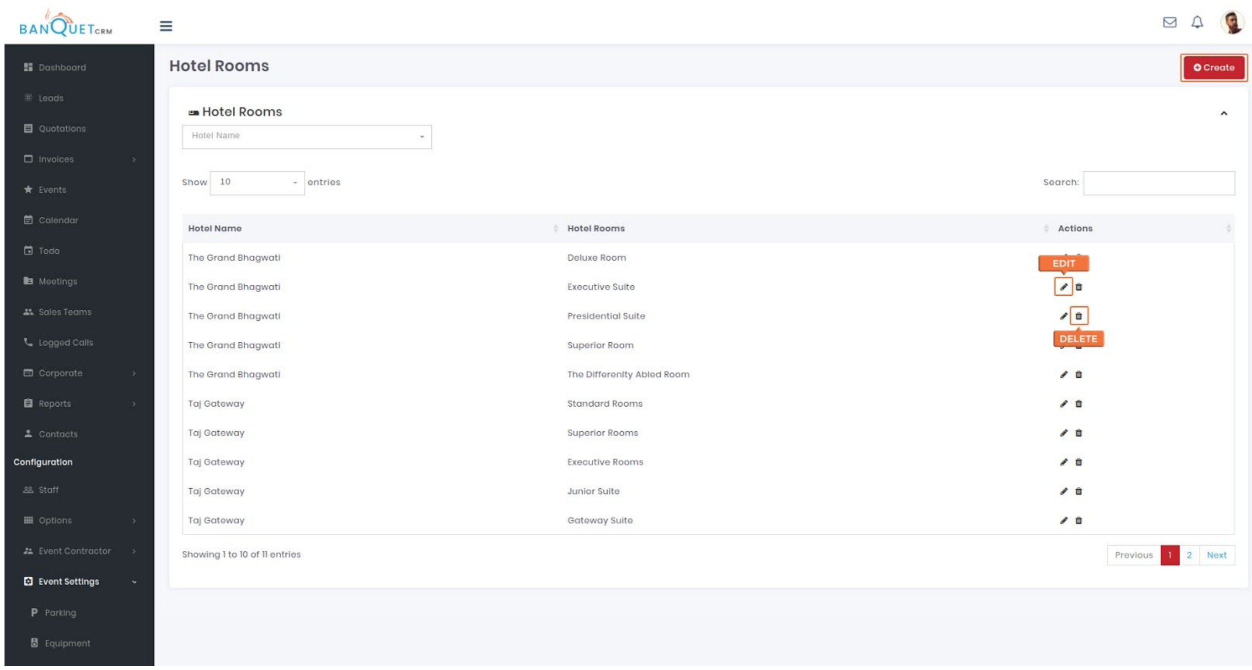
Create Hotel :

http://banquetcrm.kintudesigns.com/eventSetting/hotelCreate#/

- Here, you can create new hotel by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter hotel name. Then click on “ADD” button to create new hotel or click on “BACK” button to ignore.

Hotel Rooms

http://banquetcrm.kintudesigns.com/eventSetting/eventRoom#/



- Here, you can view list of types of hotel rooms offered by a particular hotel.

Edit Hotel Rooms :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular room type of hotel.
- By clicking on "EDIT" icon, edit hotel room page will open. Here, you can edit room type of hotel. Then click on “ADD” button to save the changes or click on “BACK” button to ignore changes.

Delete Hotel Rooms :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular room type of a hotel.

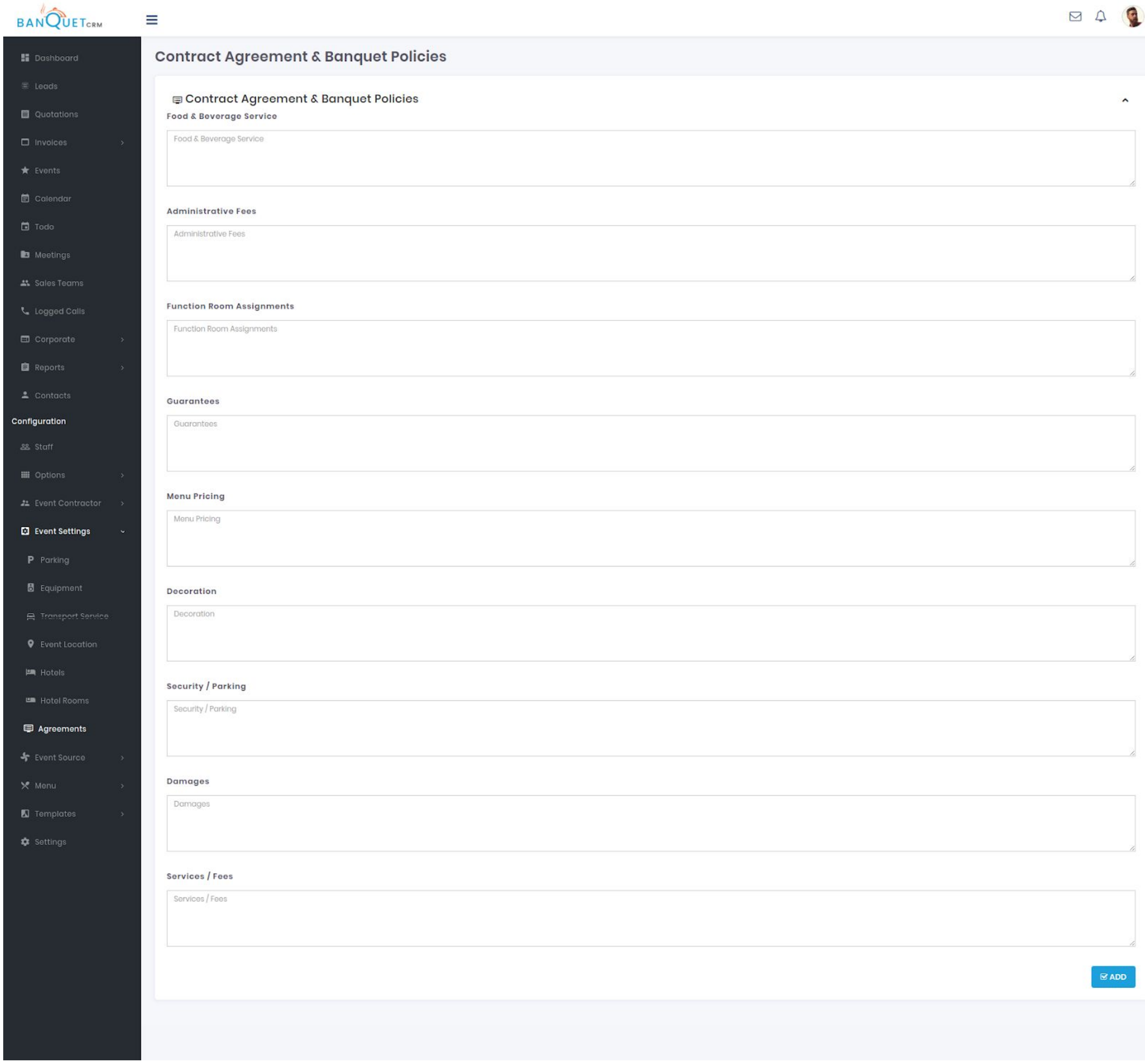
Create Hotel Rooms :

http://banquetcrm.kintudesigns.com/eventSetting/eventRoomCreate#/

- Here, you can add new room type of a hotel by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can select hotel name and then enter room type offered by a hotel. Then click on “ADD” button to create new hotel or click on “BACK” button to ignore.

Agreements

http://banquetcrm.kintudesigns.com/eventSetting/agreementPolicies#/

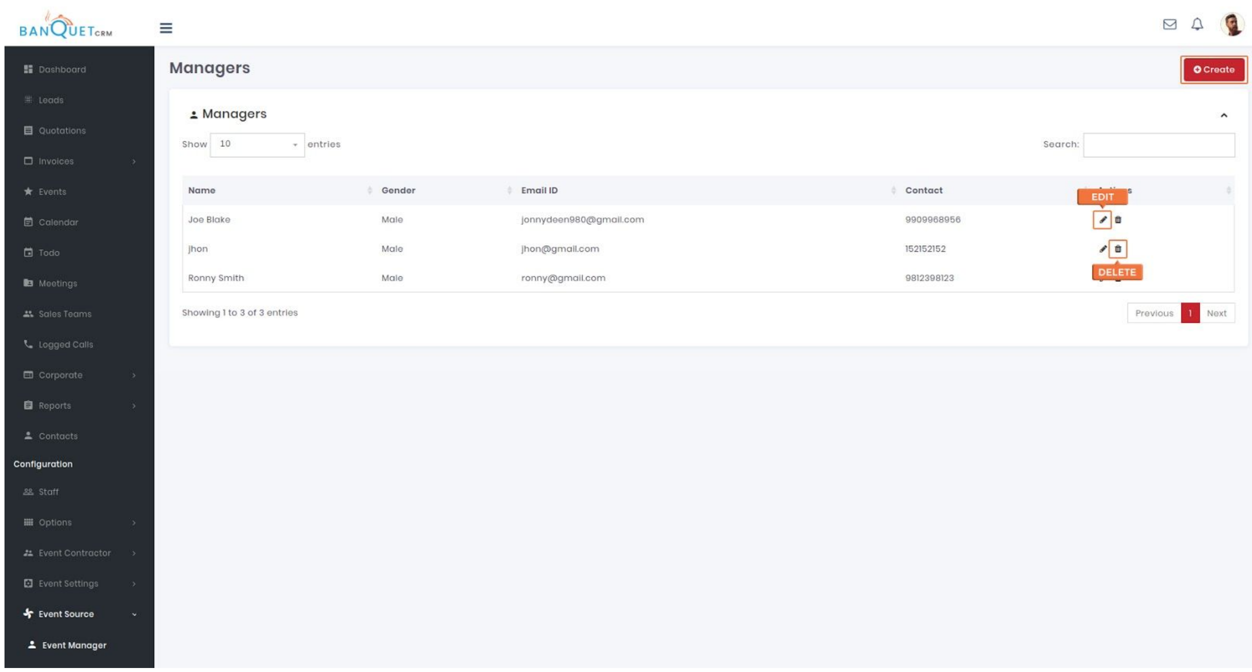


- Here, you can add your contract agreement and banquet policies like - Food & Beverage Service, Administrative Fees, Function Room Assignments, Guarantees, Menu Pricing, Decoration, Security/Parking, Damages, Services/Fees.

5. EVENT SOURCE

Event Manager

http://banquetcrm.kintudesigns.com/eventSetting/manager#/



- Here, you can view list of types of hotel rooms offered by a particular hotel.

Edit Manager :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular event manager and his details.
- By clicking on "EDIT" icon, edit event manager page will open. Here, you can edit event manager details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Manager :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular event manager.

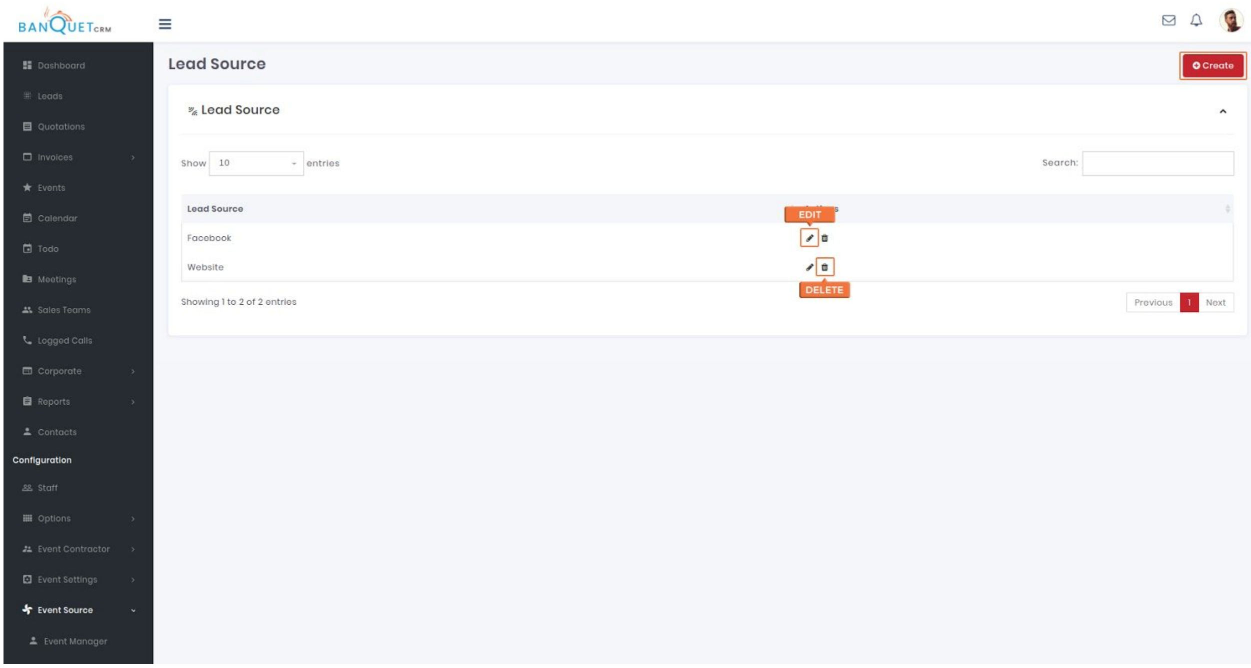
Create Manager :

http://banquetcrm.kintudesigns.com/eventSetting/managerCreate#/

- Here, you can add new event manager by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter event manager details. Then click on “OK” button to create new event manager or click on “BACK” button to ignore.

Lead Source

http://banquetcrm.kintudesigns.com/eventSetting/leadSource#/



- Here, you can view list of all lead source type.

Edit Lead Source :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular lead source type.
- By clicking on "EDIT" icon, edit event manager page will open. Here, you can edit event manager details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Lead Source :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular lead source.

Create Lead Source :

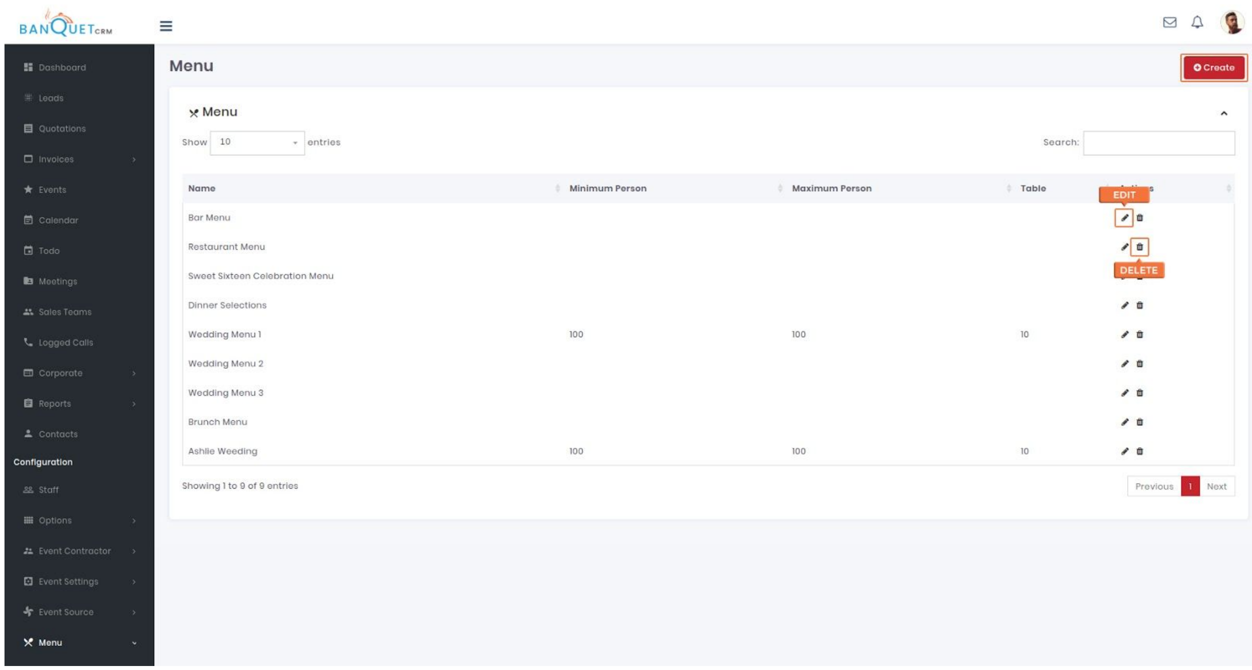
http://banquetcrm.kintudesigns.com/eventSetting/leadSourceCreate#/

- Here, you can add new lead source by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter lead source type. Then click on “ADD” button to create new lead source type or click on “BACK” button to ignore.

6. Menu

Menu

http://banquetcrm.kintudesigns.com/eventMenu/menu#/



- Here, you can view list of all menus with min-max person it serves and table it offers.

Edit Menu :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular menu.
- By clicking on "EDIT" icon, edit menu page will open. Here, you can edit menu details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Menu :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular menu.

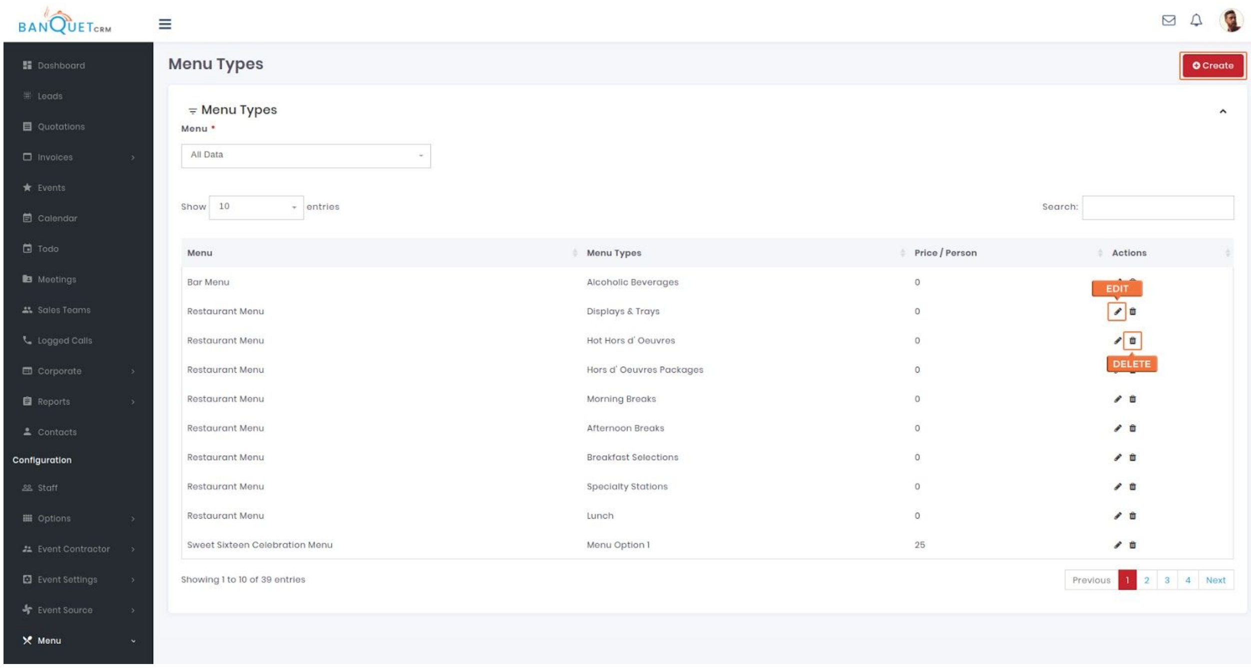
Create Menu :

http://banquetcrm.kintudesigns.com/eventMenu/mainMenuCreate#/

- Here, you can add new menu by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter menu details. Then click on “OK” button to create new menu or click on “BACK” button to ignore.

Menu Types

http://banquetcrm.kintudesigns.com/eventMenu/menu#/



- Here, you can view list of all menus with min-max person it serves and table it offers.

Edit Menu :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular menu.
- By clicking on "EDIT" icon, edit menu page will open. Here, you can edit menu details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Menu :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular menu.

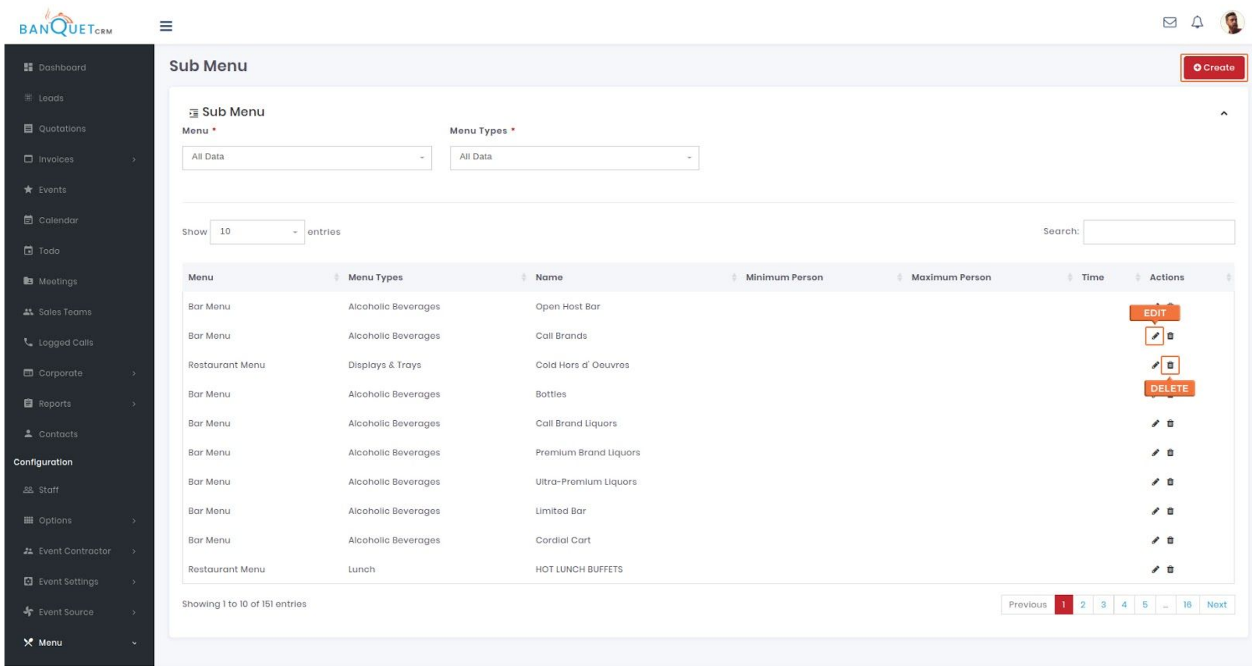
Create Menu :

http://banquetcrm.kintudesigns.com/eventMenu/mainMenuCreate#/

- Here, you can add new menu by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter menu details. Then click on “OK” button to create new menu or click on “BACK” button to ignore.

Sub Menu

http://banquetcrm.kintudesigns.com/eventMenu/subMenu#/



- Here, you can view list of all menus, menu types, and sub menu with min-max person it serves and table it offers.

Edit Sub Menu :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular sub menu.
- By clicking on "EDIT" icon, edit sub menu page will open. Here, you can edit sub menu details. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Sub Menu :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular menu.

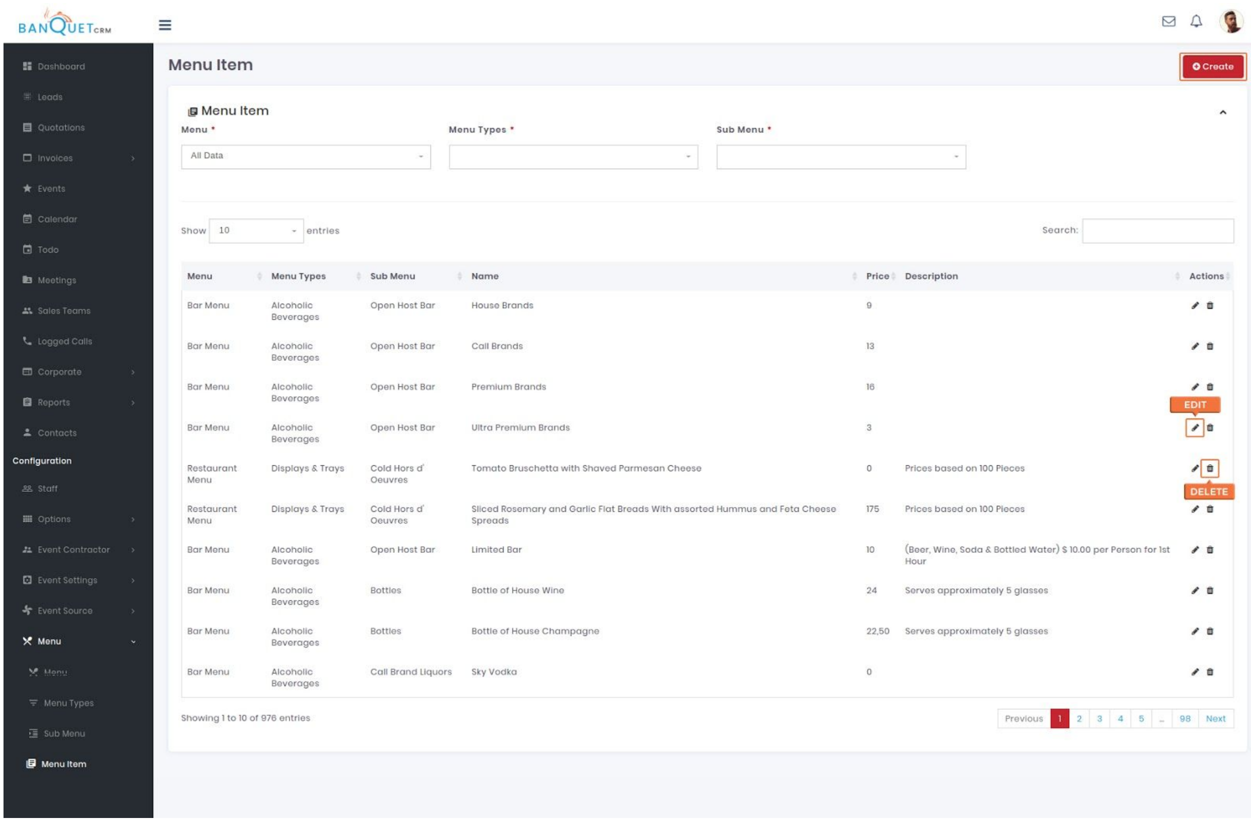
Create Sub Menu :

http://banquetcrm.kintudesigns.com/eventMenu/subMenuCreate#/

- Here, you can add new sub menu by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can enter sub menu details. Then click on “OK” button to create new menu or click on “BACK” button to ignore.

Menu Item

http://banquetcrm.kintudesigns.com/eventMenu/menuItem#/



- Here, you can view list of all menus, menu types, sub menus and respective menu items with its price and description.

Edit Menu Item :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular menu item of respective menu and sub menu.
- By clicking on "EDIT" icon, edit menu item page will open. Here, you can edit menu item and other details.
- Moreover, you can edit/add, price/person/ hour here. Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Menu Item :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular menu item from respective menu and sub menu.

Create Menu Item :

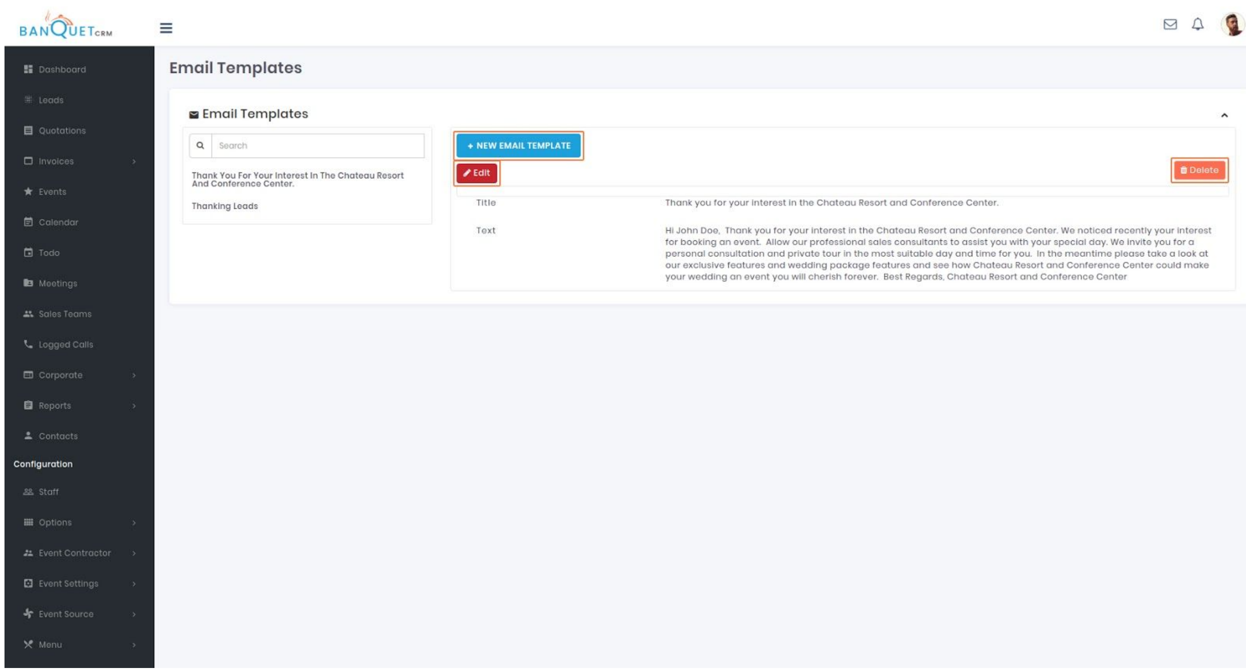
http://banquetcrm.kintudesigns.com/eventMenu/menuItemCreate#/

- Here, you can add new menu item for respective menu and sub menu by clicking on “CREATE” button.
- Once you click on “CREATE” one form will open where you can select menu, menu type, sub menu and add menu item respectively and other menu item details. Then click on “OK” button to create new menu item or click on “BACK” button to ignore.

7. Templates

Email

http://banquetcrm.kintudesigns.com/email_template#/



- Here, you can view list of all email templates.

Edit Email Template :

- Click on email template you want to edit from the list.
- When you click on particular email template, on the right hand side you can view that email details. Here, click on "EDIT" button to edit that email template.
- By clicking on "EDIT" button, that email template will open in editable form, where you can edit email title and description.
- Then click on “DONE” button to save the changes.

Delete Email Template :

- Click on email template you want to delete from the list.
- When you click on particular email template, on the right hand side you can view that email details. Here, click on "DELETE" button to delete that particular email template.

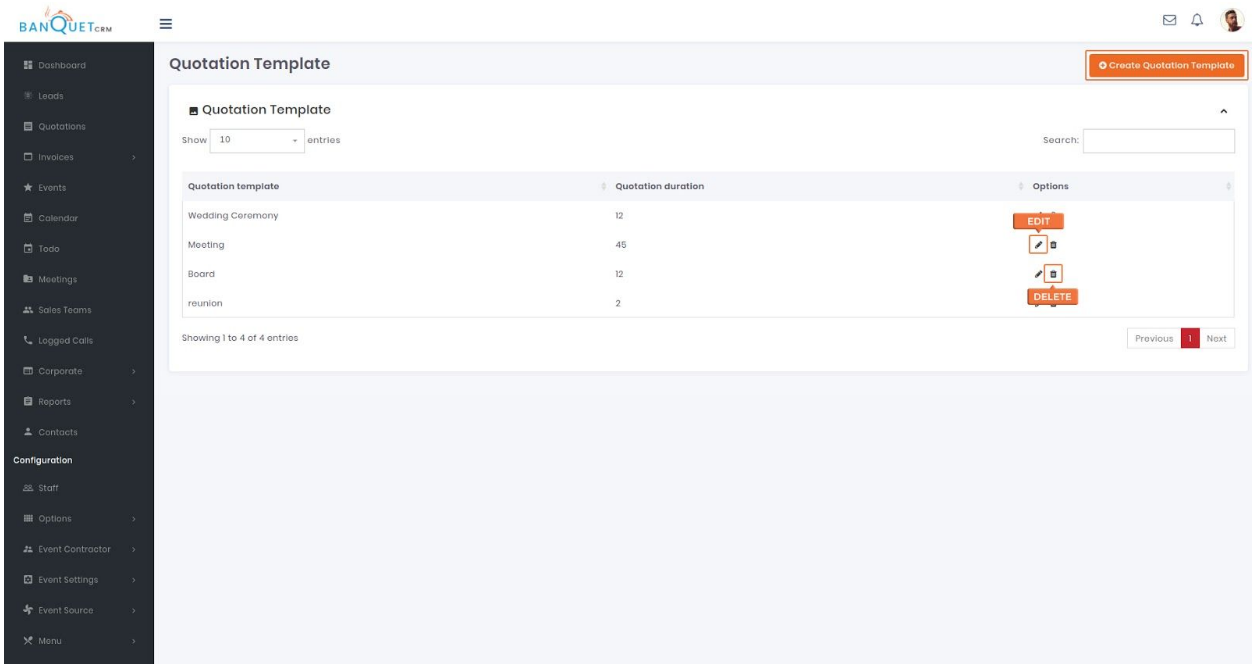
Create Email Template :

http://banquetcrm.kintudesigns.com/email_template/create#/

- Here, you can add new email template by clicking on “NEW EMAIL TEMPLATE” button.
- Once you click on “NEW EMAIL TEMPLATE” one form will open where you can enter email template title and its description. Then click on “OK” button to create new email template or click on “BACK” button to ignore.

Quotations

http://banquetcrm.kintudesigns.com/qtemplate#/



- Here, you can view list of all quotation templates.

Edit Quotation Template :

- Click on "EDIT" icon (pencil icon) in ACTIONS column to edit particular quotation template.
- By clicking on "EDIT" icon, edit quotation template page will open. Here, you can edit quotation template and other details.
- Then click on “OK” button to save the changes or click on “BACK” button to ignore changes.

Delete Quotation Template :

- Click on "DELETE" icon (trash icon) in ACTIONS column to delete particular quotation template.

Create Quotation Template :

http://banquetcrm.kintudesigns.com/qtemplate/create#/

- Here, you can add new quotation template by clicking on “NEW EMAIL TEMPLATE” button.
- Once you click on “CREATE QUOTATION TEMPLATE” one form will open where you can enter quotation template title and other details. Then click on “OK” button to create new quotation template or click on “BACK” button to ignore.

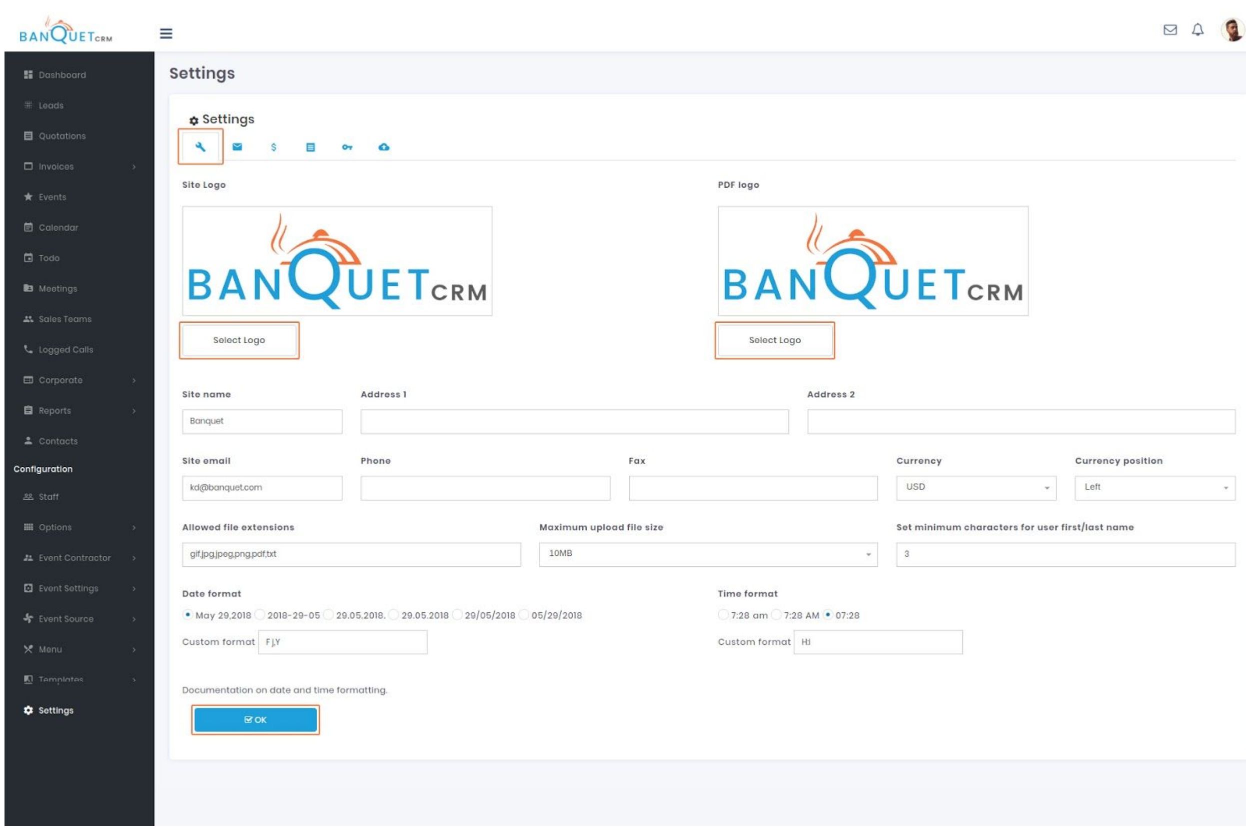
8. Settings

http://banquetcrm.kintudesigns.com/setting#/

- It's an important module, from where you can do all settings from general configuration to email configuration, payment configuration, pusher configuration, stripe settings and backup configuration.

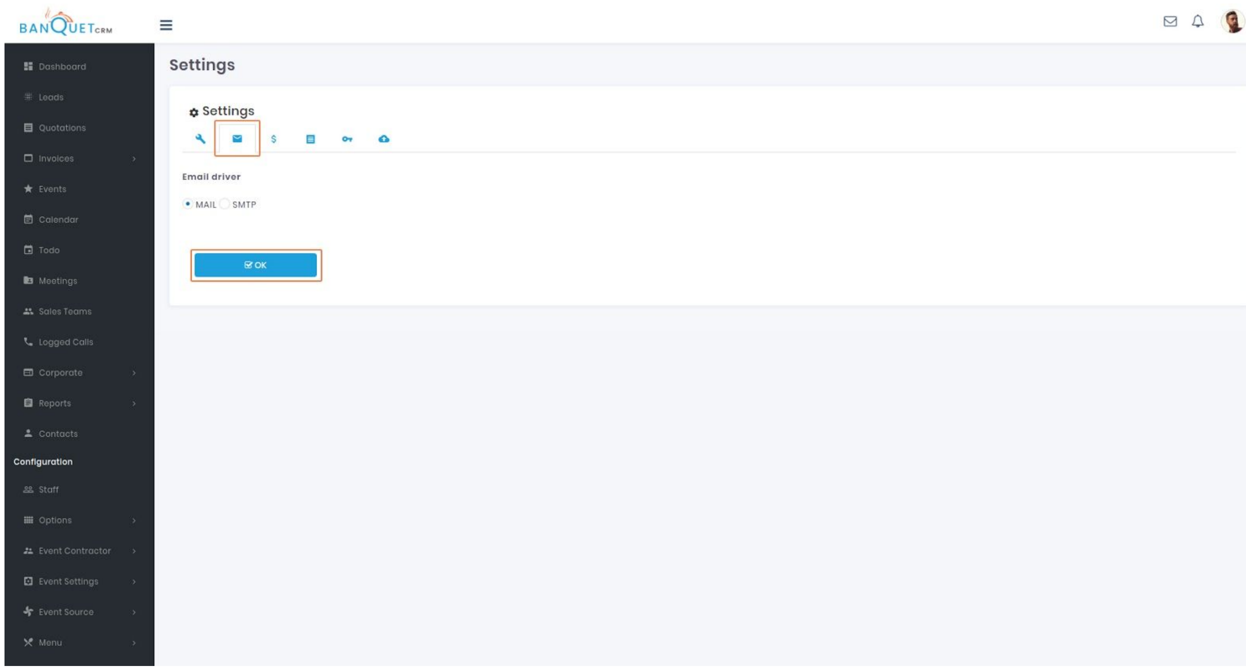
- Here, you will finds different tabs like general configuration, email configuration, payment configuration, pusher configuration, stripe settings and backup configuration.

General Configuration :



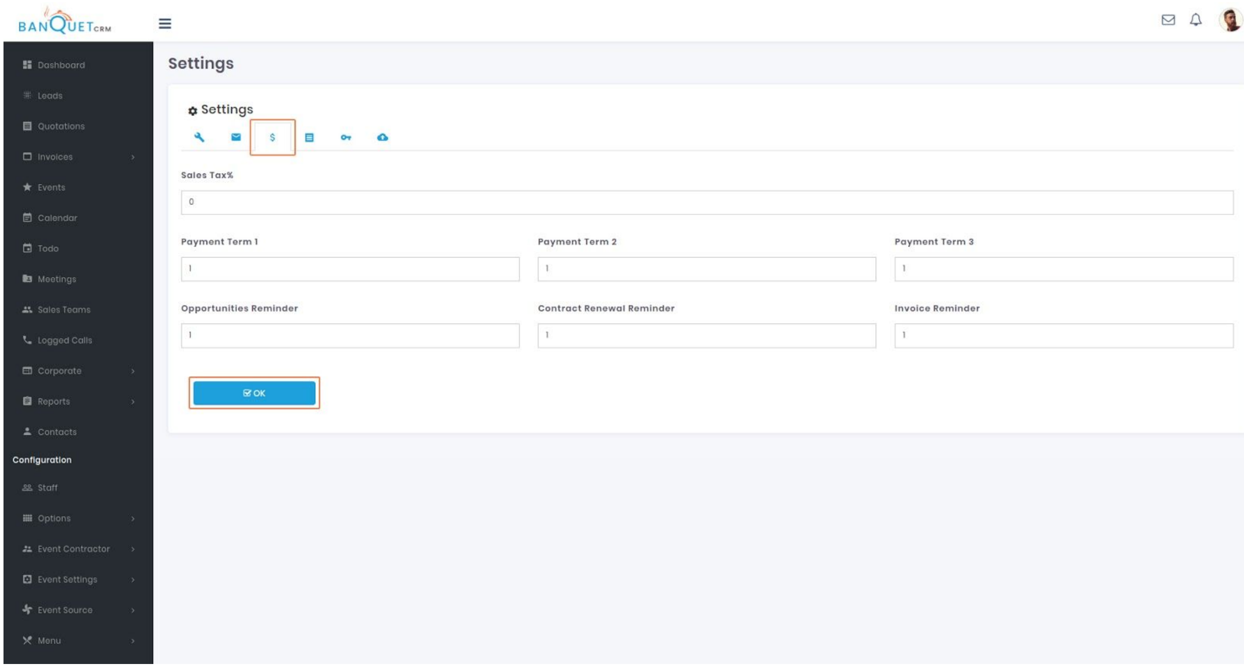
- Here, you can upload your logo and enter other necessary informations. Also, you can set date and time format in which it will appear in all your documentations.
- Then click on "OK" button to save changes.

Email Configuration :



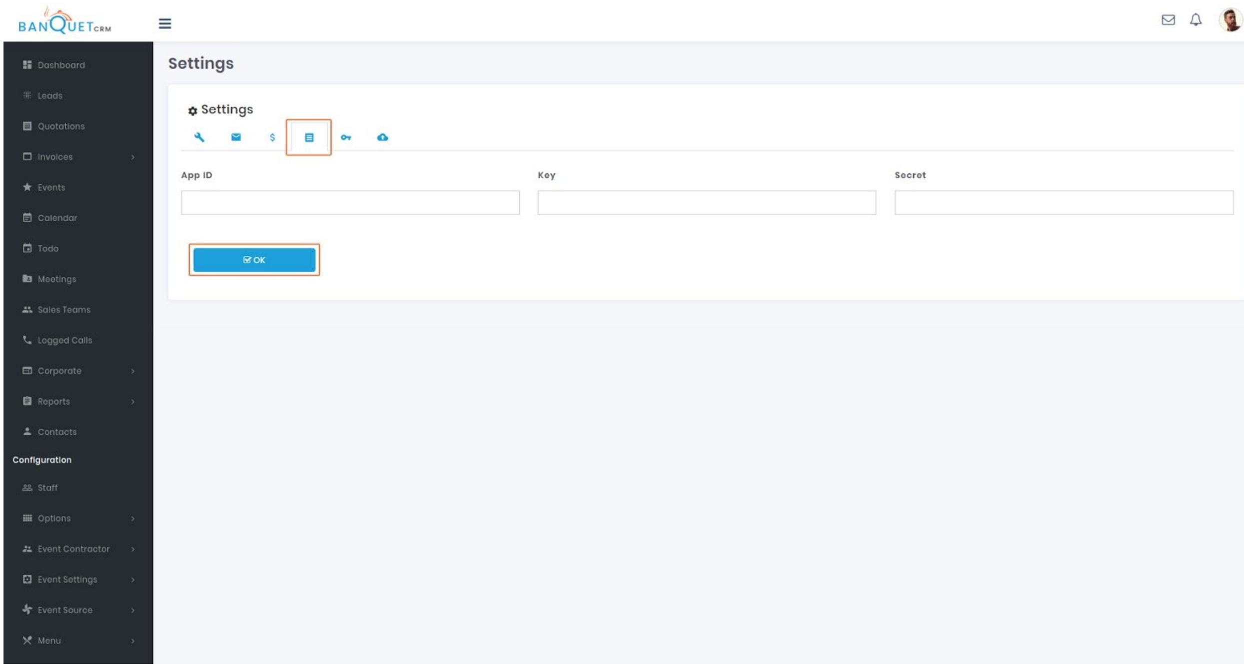
- Here, you choose your email driver as either "MAIL" or "SMTP".
- If you choose "SMTP" as your email driver, you need to enter its details like - email server host, port, username and password.
- Then click on "OK" button to save changes.

Payment Configuration :



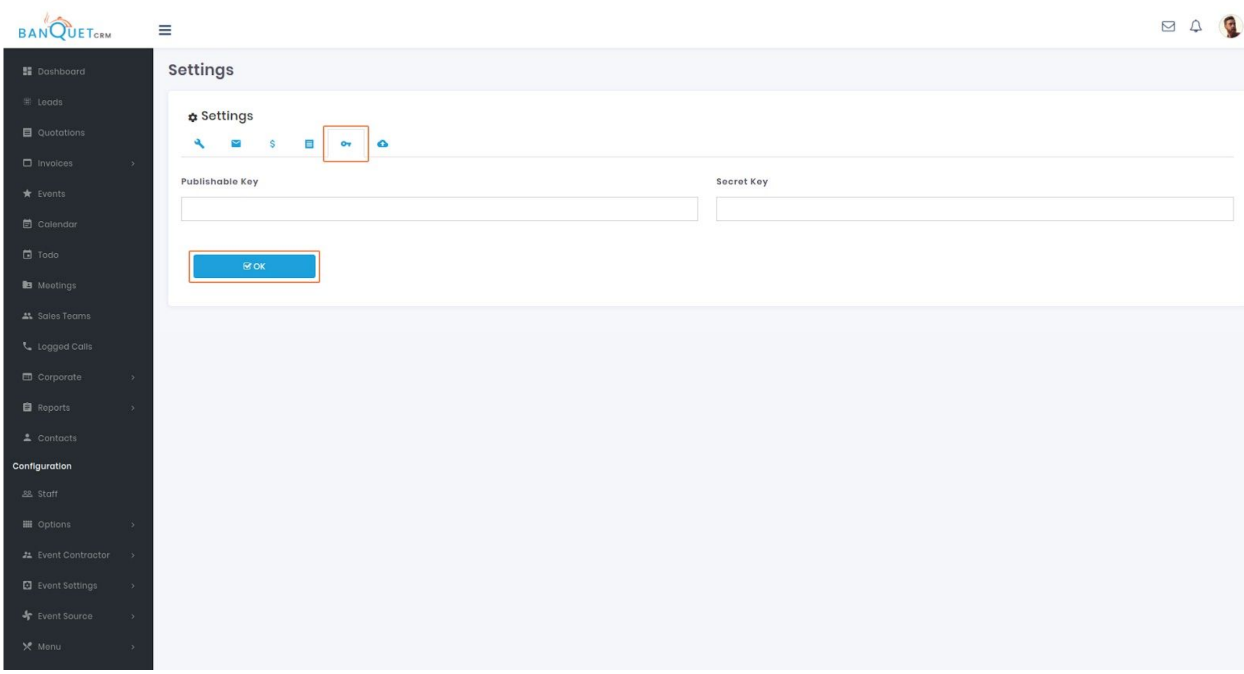
- Here, you can enter all payment related details like sales tax%, three payment terms, opportunities reminder, contract renewal reminder, and invoice reminder.
- Then click on "OK" button to save changes.

Pusher Configuration :



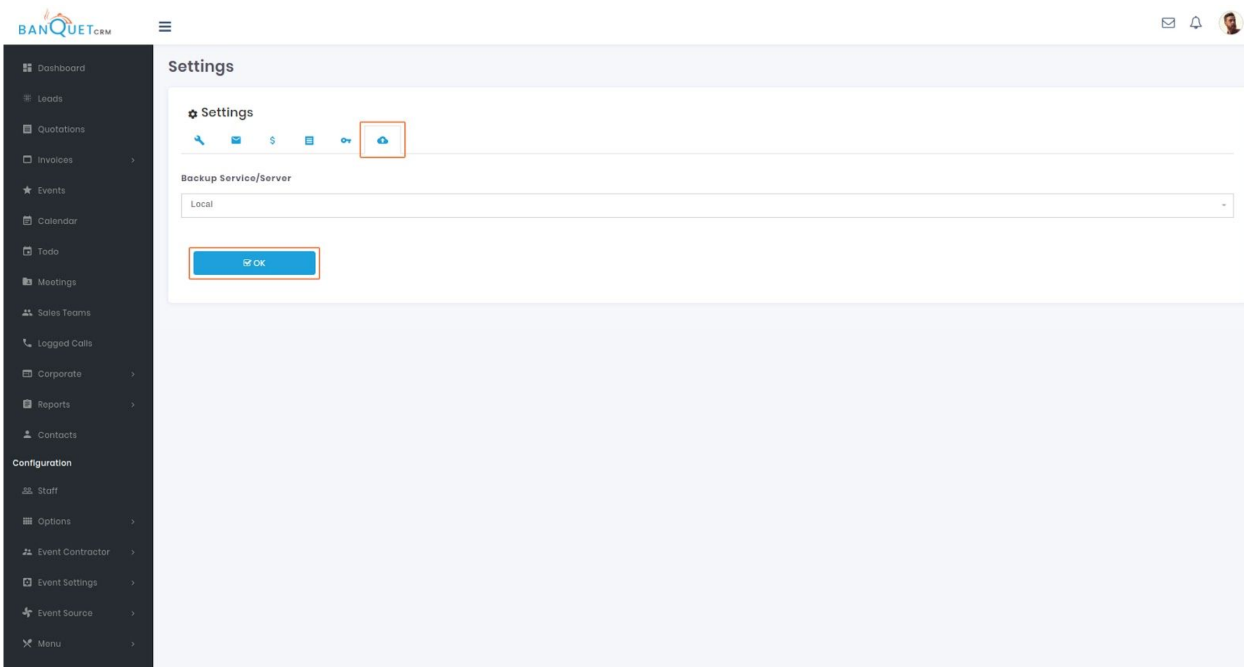
- Here, you can set pusher configuration by entering app id, key and secret.
- Then click on "OK" button to save changes.

Stripe Settings :



- Here, you can do stripe settings by entering publishable key and secret key.
- Then click on "OK" button to save changes.

Backup Configuration :



- Here, you can select backup service/server from dropdown as local, dropbox or as amazon s3.
- Then click on "OK" button to save changes.