

DJ Event Planner

The Ultimate Online Planning Tool

Getting Started with DJ Event Planner 101

1. Verify your email address

- a. DJEP > Account > Email Details – Click Verify

2. Complete your Company Details

- a. DJEP > Account > Company Details - Edit

3. Customize your website tools

- a. Website Tools > Styling Options > Enter the link to your company logo from your website or other image hosting service > Modify any other settings you see fit

4. Configure your website tools

- a. Website Tools > Client Portal (or other website tools) > Modify any Questions/Auto Responders/Settings

5. Integrate the website tools into your website

- a. Website Tools > Get Code (Simply copy and paste any of the code snippets into your website editor)

6. 3 ways to Create Document Templates for things such as contracts, invoices, receipts of payment, etc

- a. Create your own: Setup > Documents > Templates > Add Template
- b. Use a Shared document: Setup > Documents > Document Sharing
 - i. Preview the documents to see if they may assist you with getting your DJEP account set up. If you find one that you feel will work for you, simply click on the file button and it will then be imported into your DJEP account. Once in your account, you can then modify the document to suit your needs.
- c. Document Conversion Service provided by DJ Event Planner staff
 - i. Further information can be found by going to: Setup > Documents > Help/FAQ > Document Conversions > View Details

7. Create E-Signature Documents

- a. Setup > Documents > Templates > Click on the document you would like to create as an E-Signature document, for instance Contract > At the bottom: Click show E-Signature Options
- b. [Visit the video tutorial regarding E-Signature Documents](#)

8. Create Planning Forms

- a. Setup > Event Planning > Planning Forms > Add New Form
- b. Shared Planning Forms can be found by going to:
 - i. Setup > Event Planning > Planning Forms > Sharing
 - ii. Preview the shared planning forms to see if they may assist you with getting your DJEP account set up. If you find one that you feel will work for you, simply click on the file button and it will then be imported into your DJEP account. Once imported, you can modify the document to suit your needs.

DJ Event Planner

The Ultimate Online Planning Tool

Getting Started with DJ Event Planner 101

- 9. Create Email Templates such as Booking Confirmation, Inquiry Follow UP, Employee Notification of Booking, etc**
 - a. Setup > Email > Events > Add Template > Event Based > Plain Text vs HTML
- 10. Configure your external mail servers for administrators and all employees sending emails.**
 - a. Visit the FAQs regarding Email Configuration, Go to: Setup > Emails > Help/FAQ
 - b. [Visit the Video Tutorial regarding Email Configuration](#)
 - c. Setup > Email > Settings > Master Admin > Outgoing Mail Server > Setup
- 11. Create Packages (Note: you can only add one package per event, additional services can be added via Add Ons)**
 - a. Setup > Packages > Add Package
- 12. Create Add Ons such as Up-lighting, Photobooth, etc**
 - a. Setup > Add Ons > Add New
- 13. Set up Booking Helpers to help with incoming business from your website**
 - a. Booking helpers allow you to make multiple changes and update to an event at the same time. It can change dates, status, and email correspondence to your clients and employees with the click of a button. You need to analyze your work flow to see what works best for you. Each company has a different process and booking helpers allow you to eliminate tasks that you do routinely when send, receiving, and adding information to each event.
 - b. Setup > Application > Booking Helper