

# Streamlining Events with Dynamic F&B Minimums



Setting custom dynamic F&B Minimums ensures pricing consistency across events and simplifies your workflow. F&B minimums automatically calculate and apply to event details. They can be customized based on location, event style, room, time, and day of the week. You have the ability to select which menu item categories should apply to F&B Minimums.

**Note:** In order to manage F&B Minimums, you must have the appropriate access in Settings.

## 1. Create your minimum amounts.

### Set up F&B minimum as a Customer Admin

- Go to Settings > Advanced Location Settings.
- Click on F&B Minimum tab - there is an option to select a Location, followed by Event Style, and Room (if applicable).
  - You will only see the locations you have access to.
- Select rate type - hourly or flat

**Notes:** Only one rate type can be used per event style or room.

For pick-up and drop-off catering, only a flat rate is permitted.

For the hourly rate, the total event time will always round up.

- Once selections are made, the F&B Minimum grid will appear.

Day of Week	Available Hours	F&B Minimum
Sunday	No hours defined	+ Add Copy from ▾
Monday	No hours defined	+ Add Copy from ▾
Tuesday	No hours defined	+ Add Copy from ▾
Wednesday	No hours defined	+ Add Copy from ▾
Thursday	No hours defined	+ Add Copy from ▾
Friday	No hours defined	+ Add Copy from ▾
Saturday	No hours defined	+ Add Copy from ▾

- To begin adding minimums, click **+ Add** on any day of the week.
  - To save a minimum, you will need a **desired spend amount, start time, and end time**.
  - If multiple minimums are created for a given day of the week, they cannot overlap.
    - i.e. If minimums are set from 12 pm to 5 pm, another minimum can be created before 12 pm or after 5 pm. The hours between 12 pm and 5 pm are unable to be selected.

Day of Week	Available Hours	F&B Minimum
Sunday	12:00 PM to 5:00 PM	\$1000.00
	5:00 PM to 10:00 PM	\$500.00

- If you have days with similar F&B Minimums such as the weekend, create minimums on one day. Then go to the day you would like to copy the minimums and select the day with the created minimums under the **Copy from** option.
  - i.e. Create minimums on Friday. Then go to Saturday and select "Copy from." Select Friday. The minimums from Friday will copy to Saturday.

- Fill in the rest of your minimums for the week and click **Save Changes** when done.

**Note:** Newly created or edited minimums from this tab will be applied to newly created events only. No changes will be made to existing events.

## 2. Use minimums within your events.

### Display on the event's details page

When an event is created and there is an F&B Minimum for that location, event style, and room, it will appear on the Event Details page under Event Financials.

- **Calculated** will appear next to the F&B Minimum field, indicating it was auto-calculated.
  - Selecting the button will open a read-only pop-up of F&B Minimums from Advanced Location Settings.

- To edit and override the default F&B minimum, click edit and adjust the amount.
  - When editing, the label will update to show **Manually Entered** in edit mode.
- When the manually edited amount is saved, no label will appear.
- An overridden minimum will not change if event details are edited and have new different minimums spends.

**Event Financials**

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**F&B Minimum**

**Manually Entered**

\$

**Financials**

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**F&B Minimum**    \$4,000.00

### Before documents are created:

If changes are made to the F&B minimum on an event, the minimum will **update** and reflect those changes once documents are created.

### After documents are created:

If changes are made to the F&B minimum on an event, the minimum must be updated manually by going to the Contract & Event Order Template > Billing Widget > Minimum Spend.

### Display on the billing widget in documents.

F&B Minimum will also be displayed in the billing widget of a document.

- If the minimum has been manually updated, no label will appear.

F&B Minimum

3000.0    \$ 3000

Calculated    \$0 Met

⋮

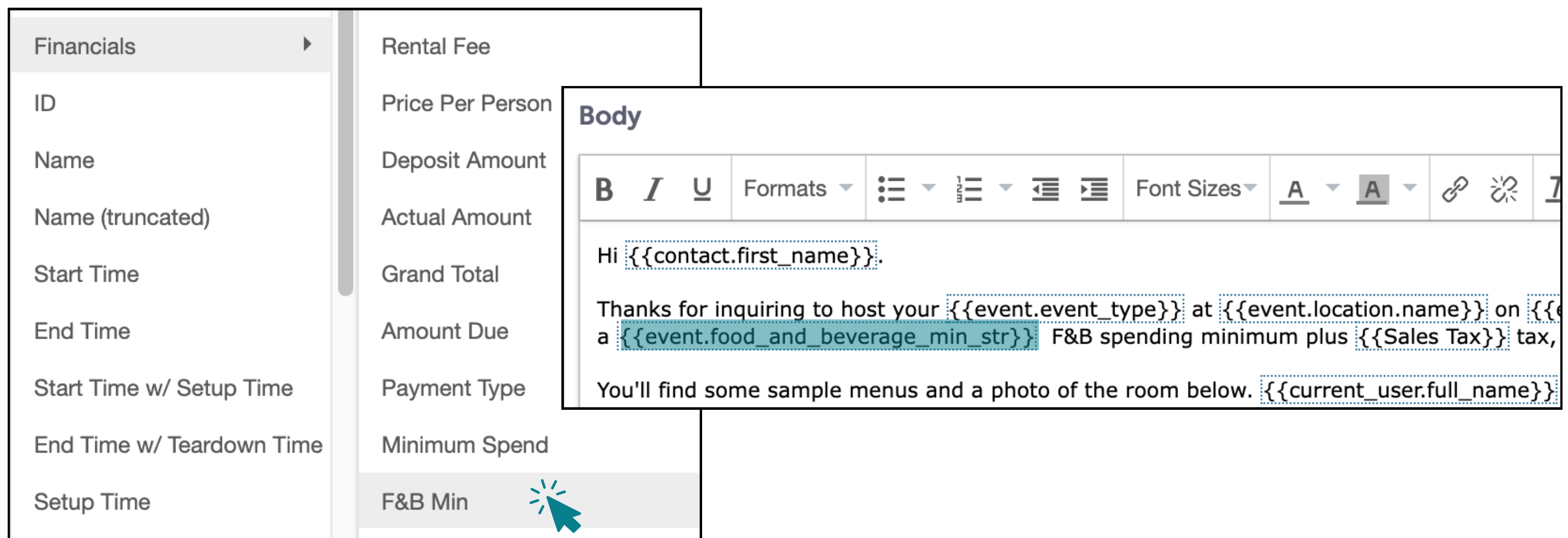
**Note:** To change which menu item categories should apply to the minimum on an event, click and select the categories. You can also check off any billing details that apply to the unmet minimum. To make changes for **ALL newly created events**, edit the template in Settings > Documents > Contract & Event Order Template.

<p><b>RESTRICT TO THESE CATEGORIES</b></p> <p><input type="checkbox"/> ACTIVITIES</p> <p><input type="checkbox"/> AUDIO VISUAL</p> <p><input checked="" type="checkbox"/> BEVERAGE</p> <p><input type="checkbox"/> DELIVERY FEE</p> <p><input checked="" type="checkbox"/> FOOD</p> <p><input type="checkbox"/> OTHER</p> <p><input type="checkbox"/> ROOM RENTAL</p> <p><input type="checkbox"/> SETUP</p> <p><input type="checkbox"/> STAFFING</p>	<p><b>APPLY FOLLOWING FEES</b></p> <p><input checked="" type="checkbox"/> ADMINISTRATION FEE (INCLUSIVE)</p> <p><input type="checkbox"/> CREDIT CARD PROCESSING FEE</p> <p><input checked="" type="checkbox"/> GRATUITY</p> <p><input type="checkbox"/> INCLUSIVE SALES TAX (INCLUSIVE)</p> <p><input checked="" type="checkbox"/> SALES TAX</p>	<p><input checked="" type="checkbox"/> EXCLUDE FROM ALL TOTALS</p>
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### Add to documents, discussion email templates, and document templates

F&B Minimums can also be added to an event's documents via merge fields and will pull the information directly from the event's data when using a content template or a discussion email template!

- Go into either the document, content template, or discussion email template to edit.
- In the text box, right-click to enable the merge fields. Hover over Event Fields > Financials > and then select F&B Minimum.



### 3. Report on minimums

F&B Minimums can also be included in the Event Details Report for more options for in-depth reporting!

- Click [Customize](#) to begin detailing out your new report.
  - **Event Details Report:** Minimums can be found underneath the **Financials** tab when choosing a range for your report. You can also add various financial information regarding F&B Minimums, such as the unmet minimum plus the actual amount and the F&B Minimum balance in the **Columns** tab.

