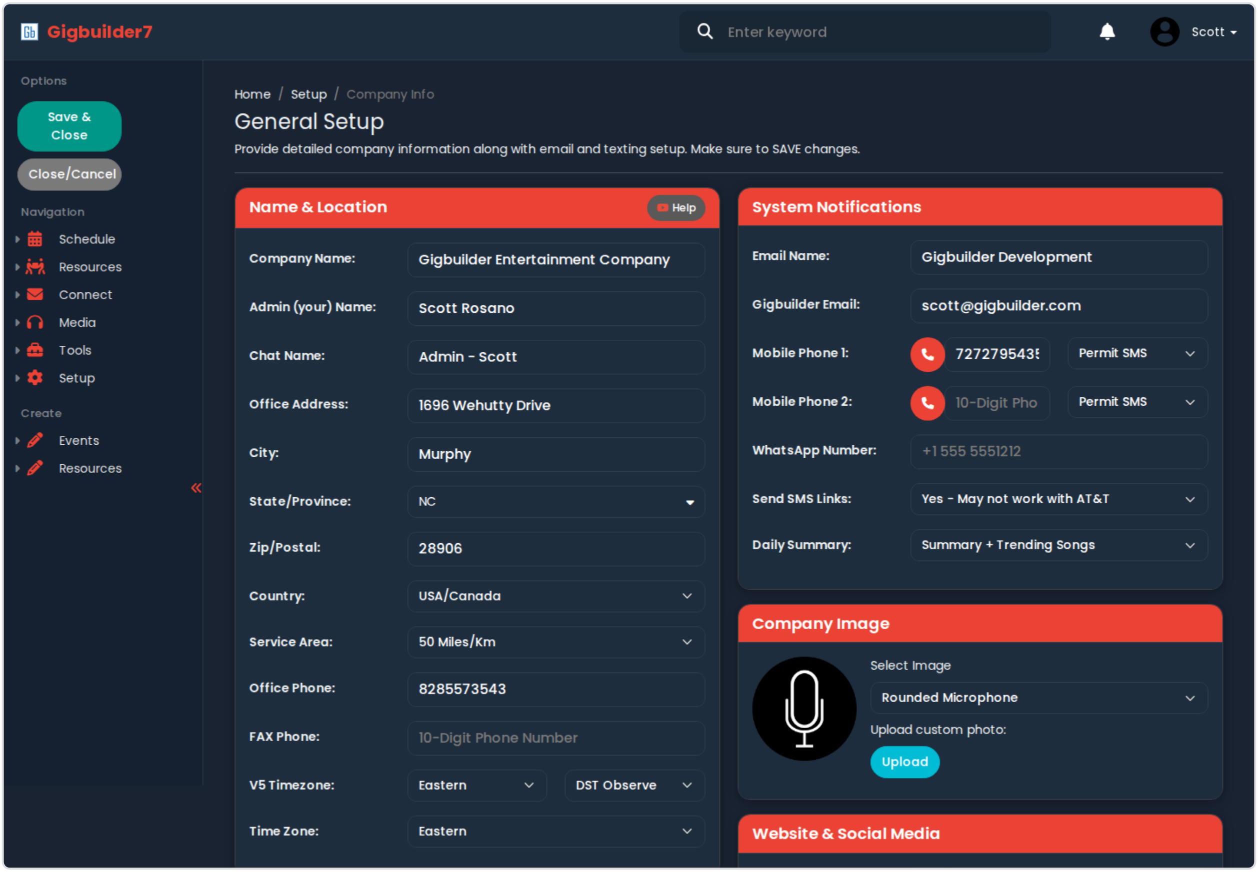
Gigbuilder Setup Guide

Section 1: General Setup

For Mobile Disc Jockeys

Version 1.0 · April 2026 · gigbuilder.com

Table of Contents



Company Information

Overview

The Company Information page is the foundation of the Gigbuilder CRM. It defines who you are, how clients and the system reach you, and how outgoing communications are branded and routed. Every new account should complete this page before using any other part of the CRM.

Section: Name & Location

Field	Description	Notes
Company Name	Your business name as it appears to clients	Used in emails, contracts, and the client portal
Admin (your) Name	The CRM owner's name	Used in system notifications and signatures
Chat Name	Display name shown in the client chat interface	

Field	Description	Notes
		The chat tool is an optional messaging feature inside the client center — used for event-long conversations between you and your client
Office Address	Street address of your business	Used in contracts and client-facing documents
City / State / Zip / Country	Business location	Country options: USA/Canada, United Kingdom, Australia
Service Area	How far you travel for events	Set in miles or km (5–100); used in availability and lead filtering
Office Phone	Primary business phone number	
FAX Phone	Fax number if applicable	Optional
Time Zone	Your local time zone	**Use this field.** See note below about the legacy V5 Timezone field.
DST Observe	Whether your area observes Daylight Saving Time	Toggle off if you are in Arizona or another non-DST region

> **Important — Time Zone:** There are two timezone fields visible on this page. The **V5 Timezone** field is a legacy holdover and will be removed in a future update. Always set and update the **Time Zone** field (the second one). The V5 field can be ignored.

Section: System Notifications

Controls where Gigbuilder sends alerts, daily summaries, and SMS messages.

Field	Description	Notes
Email Name	Display name for outgoing system emails	e.g., "Murphy Entertainment" — appears in the From line
Gigbuilder Email	The email address system notifications are sent to	This is your admin inbox
Mobile Phone 1 / 2	Phone numbers for SMS and voice call alerts	Each can be individually set to No SMS or Permit SMS
WhatsApp Number	WhatsApp contact number	Optional
Send SMS Links		**Recommended: Yes.** Most carriers now accept links without filtering. When enabled, clients receive a clickable URL directly

Field	Description	Notes
	Whether SMS messages include a direct URL to the event or page	to their event in Gigbuilder — saves them from having to log in separately.
Daily Summary	A daily email digest sent to the CRM owner	Three options: **Send Daily Summary** (standard activity recap), **Summary + Trending Songs** (adds the most-requested songs over the past 30 days — useful for music-heavy events), **Do Not Send**

Section: Company Image

Choose how your brand appears in the client portal and documents.

Field	Description	Notes
Select Image	Pick from Gigbuilder's built-in logo library	Options include microphone, DJ, camera, and aperture styles
Upload Custom Photo	Upload your own logo or brand image	Replaces the selected image; appears as "Current Uploaded Image" once set

> **Tip:** A custom logo makes the client portal feel branded to your business rather than generic. If you have a logo file, upload it here rather than using a stock image.

Section: Website & Social Media

Field	Description
Company Website	Your main business URL
Facebook / Instagram / TwitterX / YouTube / LinkedIn / Pinterest	Social media profile URLs

These links may appear in client-facing emails and the client portal depending on your template settings.

Section: Insurance

Field	Options	Notes
Liability Insurance	WeDJ.com (Mavon), Other Carrier, None	WeDJ.com offers an insurance program through Mavon — select if enrolled
Equipment Insurance	WeDJ.com (Mavon), Other Carrier, None	Separate field for gear/equipment coverage

Section: EIN & Sales Tax

Field	Description	Notes
Federal ID (EIN/TIN)	Your business tax ID	Used on invoices and contracts
Service Taxable	How sales tax is applied	See options below
Also Tax Fees	Checkbox: apply tax to fees in addition to services	
Tax Percentage	Your local tax rate	Enter as a number (e.g., `8.5` for 8.5%)

Service Taxable Options:

Option	Meaning
Yes By Package	Tax is calculated on the package price only
Yes By Option	Tax is calculated on add-on options only
Yes Option+Package	Tax applies to both packages and options
No	Services are not taxed

Section: VCARD / QR Code

Field	Description
VCARD Items	Choose what's included when clients scan your QR code: Email, Phone, Company Name, Website
QR Token	Auto-generated token for your QR code link
VCARD Token	Auto-generated token for your digital business card

> **Tip:** The QR code and VCARD make it easy for clients to save your contact info directly to their phone. Share the QR code on your website, business cards, or event signage.

Section: Email Server & Routing

Controls how outgoing emails are sent and how client replies are handled.

Field	Description	Notes
Company Email	Your business email address	Used as the sender for outgoing CRM emails when configured
SMTP Server	Which email server handles outgoing mail	Options: Gigbuilder (default — recommended), Gmail, Office365/Outlook, Spectrum, WeDJ.com Hosting, Yahoo, Other
Test Email	Sends a test message to verify your email configuration	Use this after any SMTP change
Email Replies	Where client email replies are directed	See options below

Email Reply Routing Options:

Option	Behavior
Reply to Gigbuilder	Client replies go to Gigbuilder's system — keeps everything inside the CRM
Reply to Company Email	Client replies go directly to your own email address — useful if you prefer managing replies in your own inbox
Reply to Both (Default)	Replies go to both Gigbuilder and your company email — recommended for most users

> **Why this matters:** If a client hits Reply on a contract or confirmation email, this setting determines where that reply lands. "Reply to Both" ensures you never miss a message whether you're checking Gigbuilder or your regular email.

Section: Microsoft / Google Auth

Authenticate a Microsoft or Google account to use Gmail or Office365/Outlook as your SMTP sender.

Field	Description
Authorize (Microsoft)	Connect your Microsoft account via OAuth
Google OAuth	Connect your Google account via OAuth
SMTP Server / Port	Manual SMTP configuration if not using OAuth
Auto Config	Attempts to auto-detect SMTP settings for your email provider

> **Note:** Connecting a third-party email account (Gmail, Office365) is optional. Gigbuilder's built-in mail server is the recommended default — it is reliable, includes delivery notifications, and supports forwarding to your own email. Only switch to an outside SMTP provider if you have a specific reason to do so. If you see "Currently AUTHORIZED," your Microsoft account is already connected.

Section: SMS Number Configuration

Choose which outgoing SMS number your clients see when they receive text messages from the CRM.

Option	Number	Notes
Toll-Free	(833) 935-4708	
Toll-Free	(833) 935-4680	
10DLC	(401) 213-1068	

> All three numbers function identically for sending and receiving SMS. There is no meaningful difference in deliverability or features. Choose whichever number you prefer.

Common Issues & Workarounds

Issue: User wants to receive a copy of every outgoing CRM email in their own inbox. **Cause:** By default, Gigbuilder sends email and handles delivery internally. **Fix:** Set **Email Replies** to "Reply to Both" and configure forwarding in the Email Server section. Gigbuilder's mail server includes delivery notifications so you can see exactly when messages were sent and received — no need to switch to an outside SMTP provider.

Issue: Client says they didn't get a text message with the event link. **Cause:** "Send SMS Links" may be set to No. **Fix:** Enable "Send SMS Links" in the System Notifications section. Most carriers now pass links through without filtering.

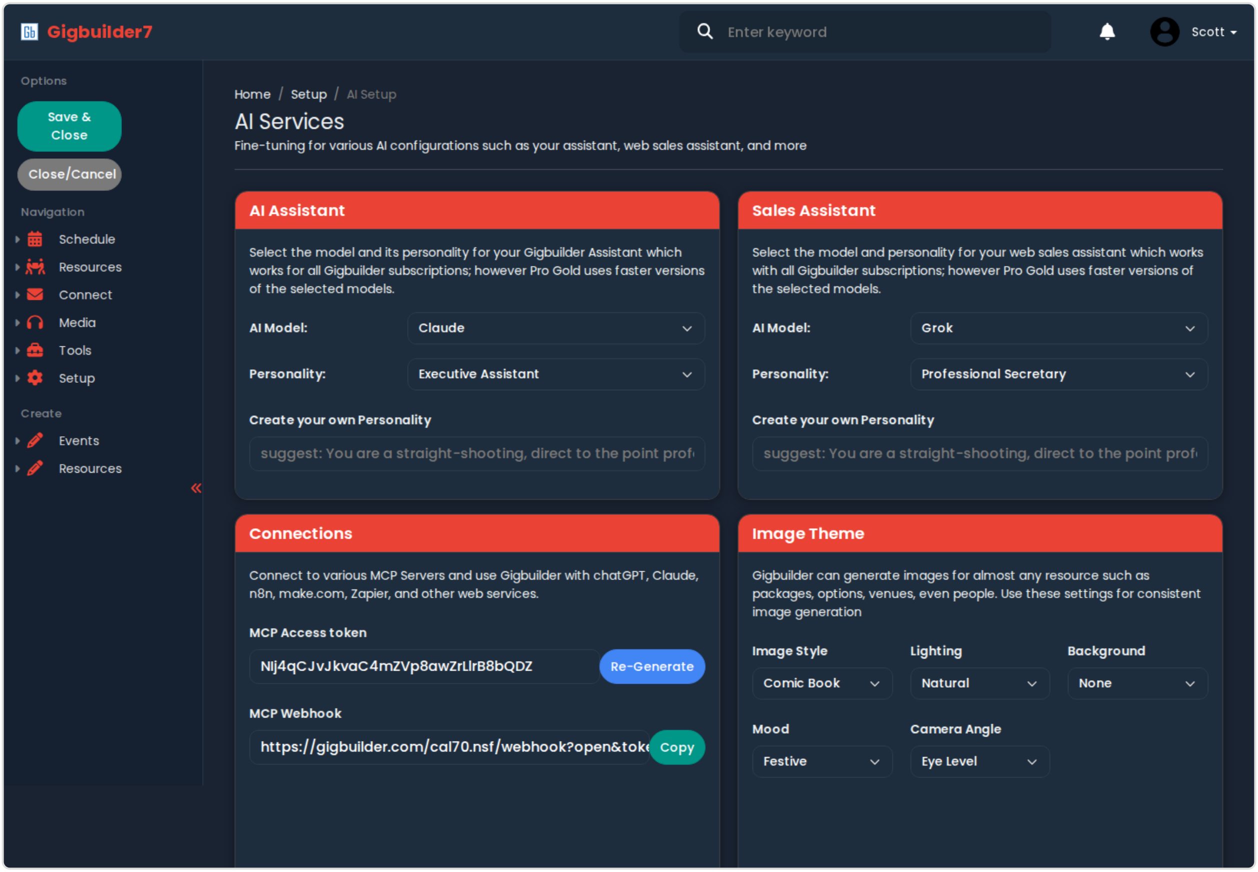
Issue: Client replies to a CRM email are not arriving. **Cause:** Email Replies may be set to "Reply to Gigbuilder" only. **Fix:** Change to "Reply to Both" so replies land in both the CRM and your personal inbox. No messages will be missed.

Issue: Time zone is showing the wrong time for events. **Cause:** The V5 Timezone field (legacy) was set but the active Time Zone field was not. **Fix:** Set the correct time zone in the **Time Zone** dropdown (the second one on the page). The V5 field is no longer used and will be removed in a future update.

Hints & Pro Tips

- **Stick with Gigbuilder's default SMTP** unless you have a specific reason to switch — it's rock solid for delivery, includes delivery notifications, and lets you forward a copy to your own inbox. Most users never need to change it.
- **Upload your own logo** — even a simple transparent PNG makes the client portal look professional instead of generic.

- **Enable Daily Summary + Trending Songs** if you do music-heavy events (weddings, parties). The trending songs report helps you spot what's popular before you even talk to a new client.
- **"Reply to Both" is the safe default** for email routing — it gives you a backup channel if you forget to check the CRM, and keeps a record inside Gigbuilder at the same time.
- **Use the Test Email button** any time you change your SMTP settings — don't wait for a real client email to find out something broke.
- **The Chat Name field** sets what clients see when you message them through the client center chat. Make it friendly — your first name or your business name works well.



AI Services

Overview

The AI Services page controls three distinct AI-powered capabilities in Gigbuilder:

1. **AI Assistant** — a personal assistant for the CRM owner, accessible inside Gigbuilder and through external tools like ChatGPT and Claude
2. **Sales Assistant** — a customer-facing chatbot the CRM owner embeds on their own website to help prospects check availability and inquire about services
3. **Image Theme** — a consistent visual style applied when the CRM generates AI images for packages, event types, and inventory items

AI features require a **Pro or Premium subscription**. The Premium plan (Pro Gold) unlocks faster model versions.

Subscription Tiers & AI Access

Plan	Price	AI Access
Basic	$25/month	No AI features
Pro	$35/month	AI Assistant + Sales Assistant included
Premium (Pro Gold)	$50/month	Advanced AI — same features plus faster model versions

> All plans include unlimited events, e-payments, e-signatures, and client portals. Annual billing saves 15%. A 30-day free trial is available with no credit card required.

Section: AI Assistant

The AI Assistant is the CRM owner's personal helper inside Gigbuilder. It can assist with a wide range of CRM functions — drafting emails, summarizing event details, answering questions about the system, and more.

Beyond the CRM interface, the AI Assistant connects to external AI platforms via the **MCP Server** (see Connections section below), allowing the CRM owner to operate Gigbuilder directly from ChatGPT, Claude, or other compatible tools.

Field	Description	Notes
AI Model	The AI engine powering the assistant	Options: ChatGPT, Claude, DeepSeek, Google Gemini (Fast), Grok, Meta/Llama
Personality	How the assistant communicates — its tone and style	See personality options below
Create your own Personality	Link to define a fully custom personality	Selecting "Define Below" in the dropdown enables custom input

AI Assistant Personality Options

Personality	Style
Aussie Female	Casual, friendly, Australian tone
British Female	Polished, proper, British tone
Chaotic Gremlin	Unpredictable, humorous, chaotic energy
Deadpan Minimalist	Dry, brief, no-nonsense
Energetic / Overly Enthusiastic	High energy, excitable
Executive Assistant	Formal, efficient, professional
Flirty Siren	Playful and charming

Personality	Style
Professor / Scholar	Thoughtful, detailed, educational tone
Sarcastic Sidekick	Witty with a dry edge
Define Below	Write your own personality prompt

> **Custom Personality:** Selecting "Define Below" allows the user to write their own personality description in plain language. There are no strict format requirements — describe the tone, style, and character you want. Example: "Friendly and concise, like a knowledgeable friend in the events industry."

Section: Sales Assistant

The Sales Assistant is a separate AI chatbot designed for the CRM owner's **own website**. It interacts with potential clients — answering questions about services, checking availability, and holding dates — before they ever contact the DJ directly.

This is a prospect-facing tool, not a CRM management tool. It operates independently from the AI Assistant.

Field	Description	Notes
AI Model	The AI engine powering the sales assistant	Options: Claude, DeepSeek, Google Gemini, Grok, OpenAI (ChatGPT)
Personality	Tone and style for prospect interactions	See personality options below
Create your own Personality	Define a custom personality	Same "Define Below" option as the AI Assistant

Sales Assistant Personality Options

Personality	Style
Excited Wedding Insider	Enthusiastic, wedding-industry savvy
Warm Bestie	Friendly, approachable, conversational
Polished Concierge	Upscale, attentive, professional
Professional Secretary	Formal, efficient, businesslike
Define Below	Write your own personality prompt

> **Tip:** The Sales Assistant personality should match the CRM owner's brand. A high-end wedding DJ might choose Polished Concierge; a party DJ might prefer Warm Bestie or Excited Wedding Insider.

Section: Connections (MCP Server)

The Connections section provides the credentials needed to link Gigbuilder to external AI platforms and automation tools.

Field	Description	Notes
MCP Access Token	A unique security token for authenticating external connections	Click **Re-Generate** to create a new token if the current one is compromised
MCP Webhook	The full webhook URL used to connect Gigbuilder to ChatGPT, Claude, n8n, Make.com, Zapier, and other services	Click **Copy** to copy to clipboard

What is the MCP Server?

MCP (Model Context Protocol) allows the CRM owner to operate Gigbuilder from inside external AI tools. For example: - Ask ChatGPT to check availability for a date and Gigbuilder responds with live data - Use Claude to create or update an event without opening the CRM - Trigger Gigbuilder actions from n8n or Zapier workflows

The webhook URL and token are all that's needed to make the connection. Instructions for specific platforms (ChatGPT, Claude, n8n, etc.) are provided in the CRM.

> **Security note:** The MCP Access Token is like a password. If it is ever shared accidentally or compromised, use **Re-Generate** immediately to invalidate the old token and create a new one.

Section: Image Theme

When Gigbuilder generates AI images for inventory items, packages, event types, and other resources, the Image Theme settings ensure all generated images share a consistent visual style — so they look like they belong together rather than a mismatched collection.

Field	Options
Image Style	3D Render, Anime, Caricature, Cartoon, Chibi, Cinematic, Comic Book, Flat Design, Illustration, Low Poly, Manga, Oil Painting, Pencil Sketch, Photorealistic, Pixel Art, Pop Art, Sticker, Watercolor
Lighting	Backlit, Bright, Candlelight, Dramatic, Golden Hour, Natural, Neon, Soft, Studio
Background	Blurred, Detailed, Gradient, Indoor, None, Outdoor, Simple, Transparent
Mood	Corporate, Dramatic, Elegant, Festive, Minimalist, Moody, Playful, Professional, Romantic, Vibrant
	45 Degree, Bird's Eye, Close Up, Eye Level, Low Angle, Overhead, Panoramic, Wide Angle

Field	Options
Camera Angle	

> **Tip:** For a professional DJ business, a popular combination is **Photorealistic** style + **Studio** lighting + **Simple** or **Transparent** background + **Professional** or **Elegant** mood. This gives images a clean, polished look that works well across packages and marketing materials.

Common Issues & Workarounds

Issue: AI features are not visible or available in the CRM. **Cause:** The account is on the Basic plan, which does not include AI. **Fix:** Upgrade to the Pro ($35/month) or Premium ($50/month) plan. A 30-day free trial is available at gigbuilder.com.

Issue: The MCP webhook is not working after sharing it with a third-party tool. **Cause:** The token may have been entered incorrectly or the URL was truncated. **Fix:** Return to AI Services, click **Copy** next to the MCP Webhook field to get the exact URL, and re-enter it in the external tool. If the token was compromised, click **Re-Generate** first.

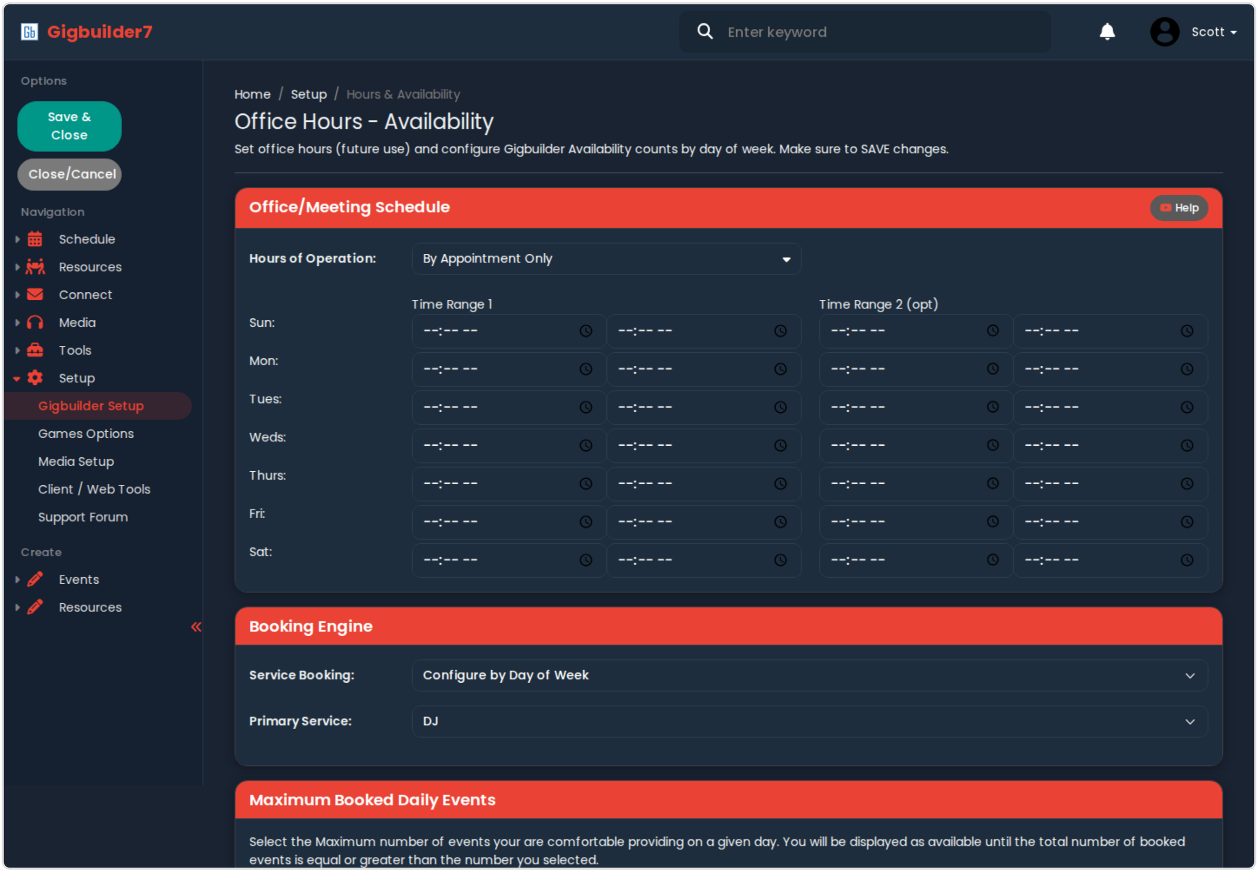
Issue: AI-generated images look inconsistent — different styles across packages and event types. **Cause:** The Image Theme was not configured before generating images, or settings were changed partway through. **Fix:** Set your preferred Image Theme settings first, then regenerate any images that don't match. Establishing the theme before generating any images keeps everything visually cohesive.

Issue: The Sales Assistant on the website doesn't match the business's tone. **Cause:** Default personality may not suit the brand. **Fix:** Try "Define Below" and write a short description of the desired tone. Even a sentence or two works — e.g., "Friendly and professional, like a knowledgeable event coordinator who's excited to help."

Hints & Pro Tips

- **AI Assistant vs Sales Assistant** — these are two separate tools for two separate audiences. The AI Assistant helps *you* run your business. The Sales Assistant helps *your prospects* on your website. They can use different models and personalities.
- **Match the Sales Assistant's personality to your brand** — a mismatch (e.g., a "Chaotic Gremlin" on a luxury wedding DJ's site) will undermine trust with prospects.
- **Set your Image Theme before generating any images** — changing the theme later means previously generated images won't match. A few minutes of setup up front saves a lot of regeneration later.

- **Pro Gold (Premium) users get faster AI model versions** — if response speed matters for your Sales Assistant on a high-traffic website, the upgrade is worth considering.
- **The MCP Server is a power feature** — CRM owners who use ChatGPT or Claude regularly can connect Gigbuilder and manage bookings, check availability, and update events without ever switching tabs.



Availability / Office Hours

Overview

This page controls how Gigbuilder determines whether you're available on a given date. When a prospect checks availability — through your website, the Sales Assistant, or inside the CRM — Gigbuilder uses these settings to decide if the date is open or fully booked.

There are two independent sections:

- **Office Hours** — reserved for a future feature (client-initiated meeting scheduling). Not yet active — no action needed here.
- **Booking Engine** — active now. This is where you configure your real availability capacity.

Section: Office Hours *(Future Use)*

The time range fields on this page (Time Range 1, Time Range 2 per day) are placeholders for an upcoming feature that will allow clients to request or schedule meetings during your defined office hours.

These fields are not currently active. You do not need to fill them in. No action is required in this section until the feature is released.

Section: Booking Engine

The Booking Engine determines how many events you can accept on any given day. Choose one of two methods:

Method 1: Configure by Day of Week

Set a fixed maximum number of events for each day of the week. Gigbuilder will mark a day as unavailable once that cap is reached.

Day	Maximum Events
Sunday	0–99 (your choice)
Monday	0–99
Tuesday	0–99
Wednesday	0–99
Thursday	0–99
Friday	0–99
Saturday	0–99

Example: If you set Saturday to `2`, Gigbuilder will show Saturday as available until 2 events are booked, then mark it full.

Setting a day to `0` effectively closes it — no bookings will be accepted on that day.

Use this method when: You know exactly how many events you're comfortable taking on each day of the week regardless of your equipment lineup.

Method 2: Use Available Systems

Instead of a fixed cap, availability is determined by the number of DJ/entertainment **systems** you have set up in Gigbuilder (under Inventory → Systems/Rooms). Each system counts as one available slot.

Example: If you have 5 DJ systems configured, Gigbuilder knows you can run 5 simultaneous events. Once 5 events are booked on a date, that date shows as unavailable.

Use this method when: Your availability is directly tied to your equipment — you can take as many events as you have systems to cover them.

Primary Service

Select the type of entertainment service your business primarily provides. This is used by the booking engine when checking and displaying availability.

Option
Band
DJ
Live Entertainer
Officiant
Other
Photo Booth
Photographer
Speaker / Coach
Videographer

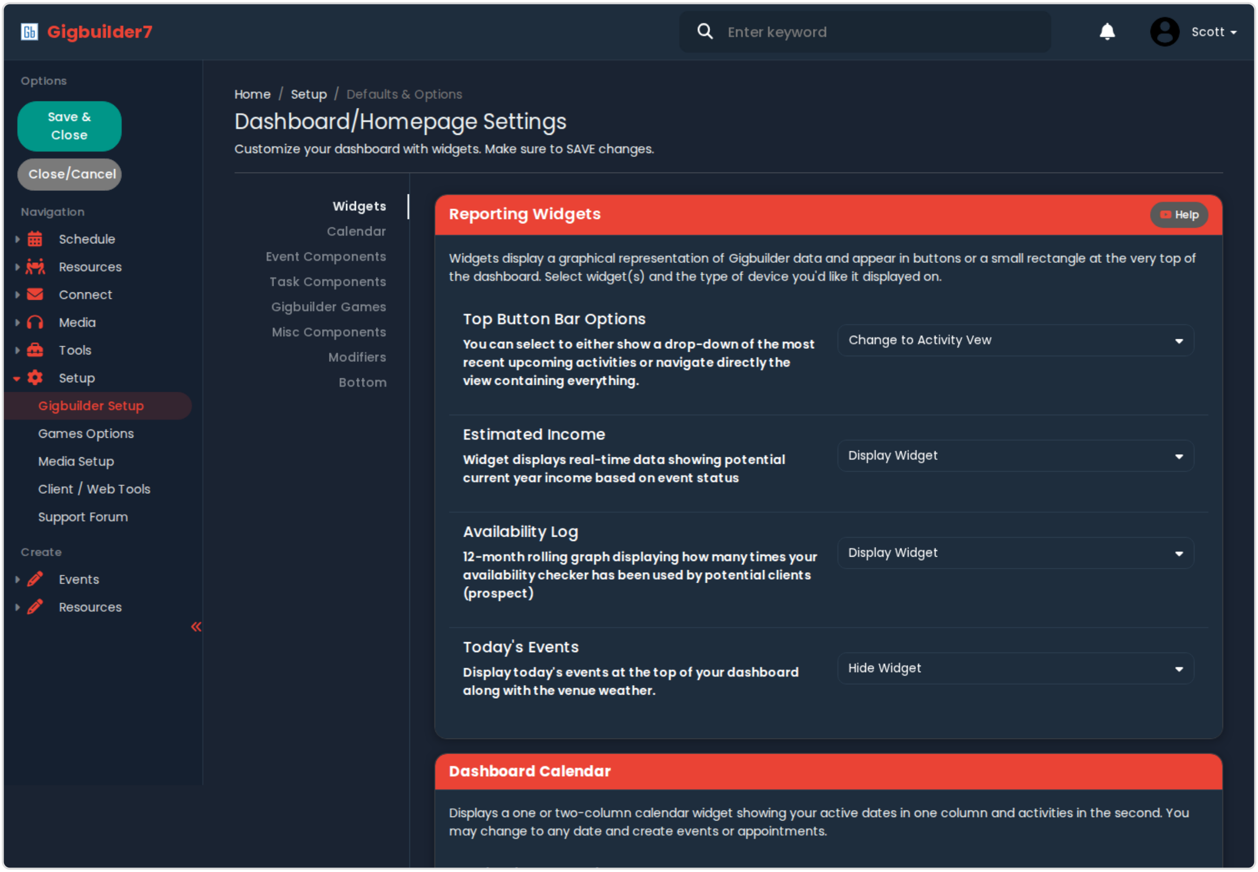
Common Issues & Workarounds

Issue: Prospects are seeing a date as available even though it's already booked. **Cause:** The daily maximum may be set higher than intended, or "Use Available Systems" is selected but systems haven't been configured in Inventory. **Fix:** Verify your method selection. If using "Configure by Day of Week," check the max count per day. If using "Use Available Systems," confirm your systems are set up under Inventory → Systems/Rooms.

Issue: A day is always showing as unavailable even with no events booked. **Cause:** The maximum for that day may be set to `0`. **Fix:** Update the maximum for that day to reflect how many events you can actually take.

Hints & Pro Tips

- **Most solo DJs use "Configure by Day of Week"** with Saturday set to `1` or `2` and weekdays set to `1` — simple and predictable.
- **Multi-system operations** benefit from "Use Available Systems" because it scales automatically as you add or retire equipment — no need to manually update the cap.
- **Setting weekdays to `0`** is a clean way to restrict bookings to weekends only without any additional configuration.
- **The Office Hours section will become important** when Gigbuilder's meeting scheduling feature launches — worth revisiting at that time.



Dashboard / Homepage Settings

Overview

The Dashboard is the first screen you see when you log in to Gigbuilder. This setup page lets you choose which information widgets are displayed, on which devices, in what order, and how many items each widget shows. Every widget is optional — configure the dashboard to show exactly what matters most to your workflow.

Changes take effect immediately after saving.

Section: Reporting Widgets

Top-level summary widgets displayed above the main dashboard.

Widget	Description	Options
Top Button Bar	Controls the default view of the activity area	Display Upcoming Activities / Change to Activity View
		Display Widget / Hide Widget

Widget	Description	Options
Estimated Income	Real-time estimate of potential income for the current year, based on event status	
Availability Log	12-month rolling graph showing how many times your availability checker has been used	Display Widget / Hide Widget
Today's Events	Highlights events happening today	Highlight Today's Events / Hide Widget

---

Section: Dashboard Calendar

A visual calendar embedded in the dashboard. Configure which event types appear and on which devices.

Setting	Options
Devices	Desktop, Tablet, Mobile — enable on any combination
Calendar Items	Blackouts, Events, Holidays, Meetings, Next Actions, Resources (shown on daily view)

> **Tip:** On mobile, a streamlined calendar with only Booked Events and Blackouts keeps things readable. Save the full view for desktop.

Section: Event Status Widgets

Each widget below corresponds to an event status or category. For each, you can configure: - **Devices:** Desktop, Tablet, and/or Mobile - **Position:** 1-Top through 10-Bottom (controls vertical order on the dashboard) - **Number of Items:** Five through All Events

Widget	What It Shows
Web Requests	New inquiries submitted through your website
Leads	Events you've reviewed and are actively pursuing
Pursued	Events you've made contact on and are following up
Pending Contract	Events awaiting contract signing
Booked Events	Confirmed upcoming events
Post Production	Events completed but still in wrap-up phase
Postponed	Events that have been rescheduled without a new date
Recently Accessed	Records you've opened recently, across all types

---

Section: Appointments, Tasks & Time Off Widgets

Widget	What It Shows
Appointments	Upcoming meetings and scheduled calls
Blackouts	Staff unavailability and office closures
Tasks	Open to-do items and action items
Approved Time Off	Staff time off that has been approved
Time Off Requests	Pending time off requests awaiting approval

---

Section: Games Widgets

For accounts using Gigbuilder's Games features (trivia, bingo, casino events).

Widget	What It Shows
Venue Prospects	Venues you're pursuing for games bookings
Sponsor Prospects	Sponsor leads for games events

Section: Additional Widgets

Widget	What It Shows
Change Requests	Pending modifications to confirmed events
E-Signatures	Contracts awaiting electronic signature
Purchase Manager	Equipment or inventory purchase tracking
Next Actions	Scheduled follow-up steps across all events

Section: Display Modifiers

Fine-tune how information appears across all widgets.

Setting	Options	Notes
Display Day of Week	Always Show Year / Current Year Show Weekday	When viewing current-year events, showing the weekday (Mon, Tue, etc.) is often more useful than the year
Display Postponed Events	Add Postponed to Calendar / Hide Postponed Events	

Setting	Options	Notes
Gigbuilder Tips	Show Tips / Hide Tips	Helpful for new users; experienced users often hide these
Live Help Icon	Display if Available Only / Show in Help	
Hide Empty Widgets	Always Show Widgets / Hide Empty Widgets	Recommended: Hide Empty — keeps the dashboard clean when some queues are empty
Primary Employee	Do Not Show / First Name+Last Initial / Full Name	Controls how the assigned DJ/entertainer is displayed in widgets
Second Employee	Same options as Primary	
Admin/Other	Same options as Primary	
Location/Venue Name	Do Not Show / Show Location Name	

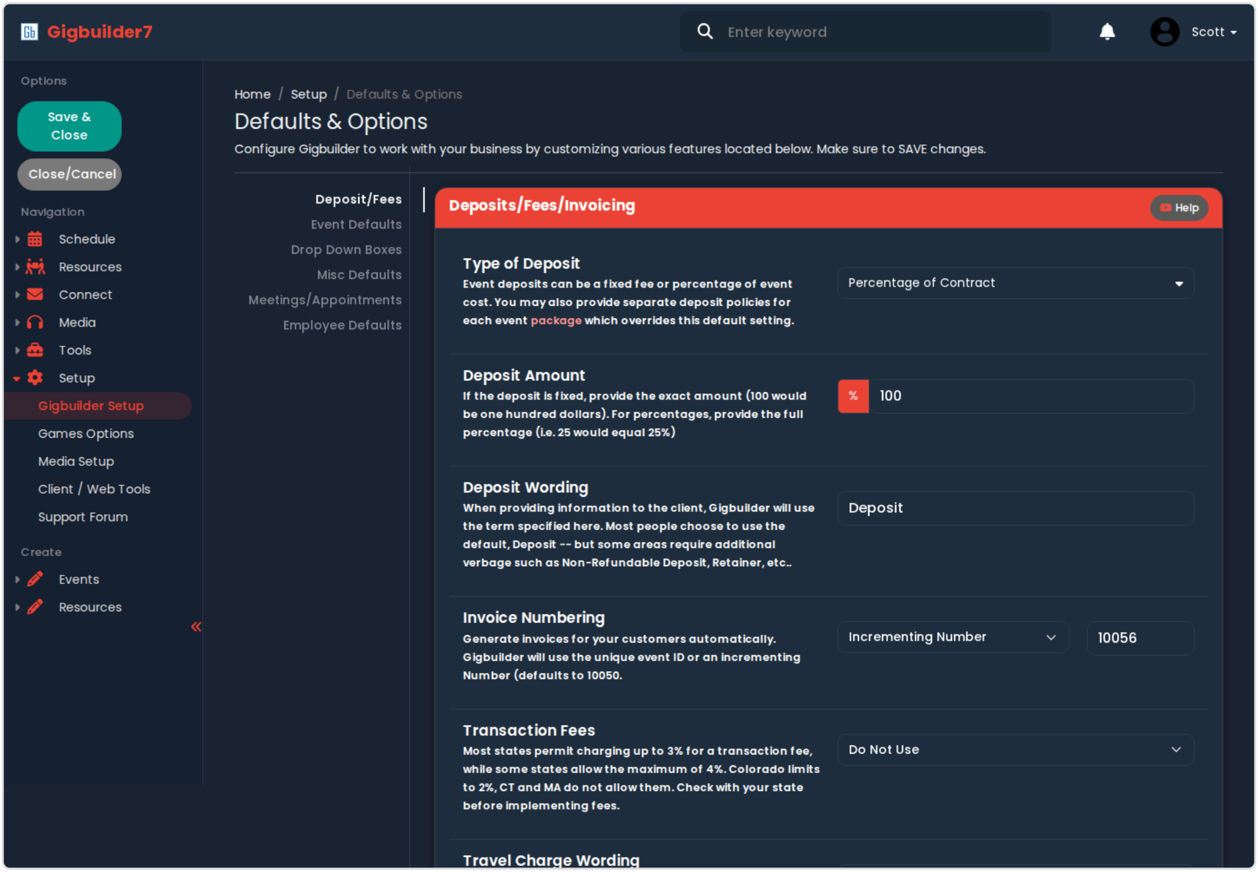
Common Issues & Workarounds

Issue: The dashboard feels cluttered or overwhelming. **Cause:** All widgets are enabled by default with no filtering. **Fix:** Enable "Hide Empty Widgets" in Display Modifiers. Then disable any widget categories you don't use (Games, for example, if you don't run trivia nights). Set the Position numbers to surface the most important queues (Booked Events, Web Requests) at the top.

Issue: Dashboard looks different on phone vs. desktop. **Cause:** Each widget has separate device checkboxes — they can be enabled on desktop but not mobile. **Fix:** Review each widget's device checkboxes and configure intentionally. A phone-optimized dashboard typically shows only Booked Events, Leads, and Today's Events.

Hints & Pro Tips

- **Start with fewer widgets and add more as needed** — it's easier to add a widget you miss than to figure out which of 15 widgets is causing noise.
- **Set "Current Year Show Weekday"** for the day display — knowing an event is on a Saturday is more useful at a glance than seeing "2026."
- **The Estimated Income widget** is a motivator — seeing your potential year-to-date earnings in real time is a good reminder of what's in the pipeline.
- **Recently Accessed** is underrated — if you bounce between many client records, this widget saves a lot of searching.



Defaults & Options

Overview

Defaults & Options is the control center for how Gigbuilder behaves across the entire system. Settings here pre-fill fields when new events, appointments, and tasks are created — saving time and ensuring consistency. Think of it as your CRM's preferences file: set it once, and every new record starts with your preferred values already in place.

This page is organized into six sections.

Section 1: Deposits / Fees / Invoicing

Field	Options	Notes
Type of Deposit	Percentage of Contract / Fixed Amount	Choose whether deposits are calculated as a % of the total or a flat dollar amount
Deposit Amount	Dollar or percentage value	Enter the default deposit amount; can be overridden per event

Field	Options	Notes
Deposit Wording	Text field	Customize what deposits are called on client-facing documents (e.g., "Retainer," "Booking Fee") — default is "Deposit"
Invoice Numbering	Unique Event ID / Incrementing Number / Manual Entry	Unique Event ID ties invoices directly to their event; Incrementing Number runs sequentially across all invoices
Transaction Fees	Do Not Use / 2% (Colorado) / 3% (Most States) / 3.5% / 4%	Adds a processing fee to cover credit card transaction costs; select your state's applicable rate
Travel Charge Wording	Text field	Customize the label for travel fees on invoices — default is "Travel Fee"

Section 2: Event Defaults

These settings pre-fill fields whenever a new event is created.

Appearance

Field	Options
Dark Mode	Default (light) / Dark Mode
Admin Theme	18 themes: Apple IOS, Bauhaus, Blue Print, Blush, Commodore 64, Default, Facebook, Google, In Da House, Material, Noir, Paperclip, Pulse, Retro 80s, Solarized, Terracotta, Transparent, Tropical Island, Vapor Wave
Theme Colors	15 color options (Black, Blue, Cyan, Gray, Green, Indigo, Light, Lime, Orange, Pink, Purple, Red, Teal, Yellow)

> Themes and colors are cosmetic — they affect your CRM interface only, not what clients see.

Event Setup

Field	Options	Notes
Default Event Template	BASIC / FULL / GAME SHOW	Controls which fields and sections appear on a new event form
Default Event Type	Wedding, Birthday Party, Corporate Event, etc.	Pre-selects the most common event type for your business
Default Event Color Code	15 colors	Color-codes events on the calendar for quick visual identification
	Same event type options	Separate default for game show bookings

Field	Options	Notes
Gameshow Default Event		
Default Event Start Time	Hour, Minute, AM/PM	Pre-fills the start time on new events
Default Event Duration	Hours and Minutes	Pre-fills how long events are expected to run
Default Setup Time	None through 3 Hours	Time added before the event for setup — used in scheduling and travel planning
Default Breakdown Time	None through 3 Hours	Time added after the event for teardown
Default Overtime Rate	Dollar amount + billing interval	Sets the per-unit overtime charge (Hourly, Half Hour, 15 Mins, 10 Mins)
Default Referral	Business Card, WeDJ.com, Search Engine, Friend, etc.	Pre-fills the "How did you hear about us?" field
Default Event Color Code	15 colors + white	

Contracts & Payments

Field	Options	Notes
Automatic Contract Date	Do Not Insert / Insert Date when Event is Pending	When enabled, Gigbuilder automatically stamps the contract date when an event reaches Pending status
Contract Due Default Days	1, 5, 7, 10, 14, 21, 30, 45, 60 days	How many days after booking the client has to return the signed contract
Balance Due Default Days	1–60 days prior to event / 1–30 days after event	When the remaining balance is due; can be set before or after the event date
Deposit-Paid Helper	Do Nothing / Status Booked / Status Pending / Status Pursued	When a client pays their deposit, Gigbuilder can automatically advance the event to a new status. Example: set to "Status Booked" to confirm the event automatically upon deposit receipt. Leave on "Do Nothing" if you prefer to change status manually.

Scheduling

Field	Options	Notes
Travel Time (To/ From)	None through 4 Hours	Default travel buffer added before and after events

Field	Options	Notes
Setup/Breakdown Time	None through 2 Hours	Separate from Default Setup/Breakdown — used in a different scheduling calculation
Duplicated Event Status	Same as Event / New Lead / Pursued / Pending / Confirmed	When you duplicate an event record, this controls the status the copy starts with

---

Section 3: Dropdown Lists

These are the selectable values that appear in dropdown menus throughout the CRM. Edit them here to match your business — remove options you don't use, add ones you do.

List	Default Values	What It's Used For
Referred By Choices	WeDJ.com, Search Engine, Friend, Business Card, etc.	How clients found you
Contact/Vendor Categories	Gigbuilder Client, Officiant	Classifying non-client contacts
Client Marketing Categories	(empty)	Segment clients for marketing campaigns
Dress Attire	Business, Casual, Dress, T-shirt, Tux	Event dress code
Appointment Titles	Client Meeting, Final Meeting, Virtual Meeting	Meeting type labels
Appointment Facilitators	(your staff names)	Who runs meetings
Contact History Helper	Called, Emailed, Sent Contract, Received Contract, Booked Event	Quick-log communication history
Employee Job Roles	Administrator, DJ/MC, Head DJ	Staff role classifications
Inventory Item Categories	Head Units, Speakers	Equipment organization
Venue Restrictions	(customizable)	Venue-specific limitations (noise ordinance, parking, etc.)
Income Categories	(empty)	Financial reporting segments
Gigbuilder Games List	Trivia, Music Bingo, Bingo Feud, Karaoke	Games you offer
Payment Categories	(customizable)	Classify payment types for reporting
Option (Addon) Categories	Additional Services, Lighting, Sound	Group add-on packages

> **Tip:** Keep these lists clean and relevant. Removing placeholder or test values (like "Auto Detailing" in Payment Categories) prevents confusion for you and any future staff.

Section 4: Miscellaneous & Global Defaults

Field	Options	Notes
Default City & State	US states / Canadian provinces	Pre-fills location on new events and contacts
Open in Edit Mode	Yes / No (default)	If Yes, records open ready to edit rather than in read-only view
View Page Default Count	10, 25, 50, 100, 250, 500, ALL	How many records show per page in list views
Link Expiration	3 Days through Four Months	Gigbuilder uses a link shortener for outgoing URLs (e.g., client portal links, contract links). This sets how long those shortened links remain active before they expire. Set based on how quickly clients typically act on links.
Activity Log	Do Not Log / Log Together (default) / Log by Employee	Controls how CRM activity is recorded. "Log Together" shows all activity in one unified feed; "Log by Employee" tracks activity per staff member separately.
Payroll	Payday, Period, Period Ends	Sets your payroll schedule for staff reporting
HTML Editor Widget	Basic (default) / Advanced (Pro)	Basic editor covers most needs; Advanced adds more formatting controls and is available on Pro plans
Inventory Control	Do Not Use (default) / Use Inventory Control	Enable if you want Gigbuilder to track equipment availability and prevent double-booking of gear
Full Calendar Options	Checkboxes: Appointments, Booked Events, Next Actions, Holidays, Pending Events, Event Leads, Blackout Days, Completed Events	Controls which event types appear on the full-page calendar view

---

Section 5: Meeting / Appointment / Task Defaults

Pre-fills fields when creating new appointments and tasks.

Appointment Defaults

Field	Options	Notes
Default Duration	Hours (0–8) + Minutes	Pre-fills meeting length
Default Meeting Type	Appointment, Meeting, Office, Rehearsal, Reminder, Virtual Meeting, Web Conference	
Default Meeting Location	Your configured locations	Pre-selects a location for new meetings
Meeting Helper	None / Append Venue / Append Event Type / Append Both	Automatically adds context to the meeting name — e.g., appending the venue name saves typing when scheduling a site visit
Include Client	Add Client to Meetings / Add Client Manually	

Reminders

Gigbuilder can send automatic reminders via email, text, and robocall before meetings and tasks. Configure the default timing and recipients here.

Reminder Type	Timing Options	Recipients
Email Reminder	None through 7 days prior	Admin Staff / Client
Text Message Reminder	None through 7 days prior	Admin Staff / Client
RoboCall Reminder	None through 8PM Prior Day	Admin Staff / Client
Next Action Reminder	30 Minutes through 2 days prior	Delivery: Email / Text/SMS

Task Defaults

Field	Options	Notes
Default Task Type	Reminder, Return Call, Support, Time Off Request, To-Do	
Next Action Default Complete Time	Hour, Minutes, AM/PM	The default time-of-day a next action is due
Copy Action Notes	Do Nothing / Copy Action Notes History	When closing and creating a follow-up action, copies previous notes into the new one
Next Action Description Helper	4 format options	Automatically appends data (venue, event type, etc.) to the next action description

Field	Options	Notes
Send Reminders Immediately	Text Message / Email	Triggers an immediate reminder when a task is created
Daily Summary Email	Show Appointment / Do Not Show	Whether appointments appear in the daily summary email
After Date Passes	Auto-Delete (various timeframes) / Auto-Archive / Do Nothing	What happens to past-due tasks and appointments

---

Section 6: Default Employees

Sets which staff members are pre-assigned to new events. See also Employee Options for assignment email configuration.

Field	Description
Primary Resource	Main DJ or performer auto-assigned to new events
Backup Resource	Secondary staff member auto-assigned
Admin Resource	Office/admin staff auto-assigned

> Set these to **None** if you manually assign staff per event. Auto-assignment here and in Employee Options work together — configure one or the other, not both.

Common Issues & Workarounds

Issue: New events always have the wrong start time or duration. **Cause:** Default Event Start Time or Duration hasn't been configured. **Fix:** Set your typical event start time and duration in Section 2. Most DJ events start around 6–7 PM and run 4–5 hours — set what fits your business.

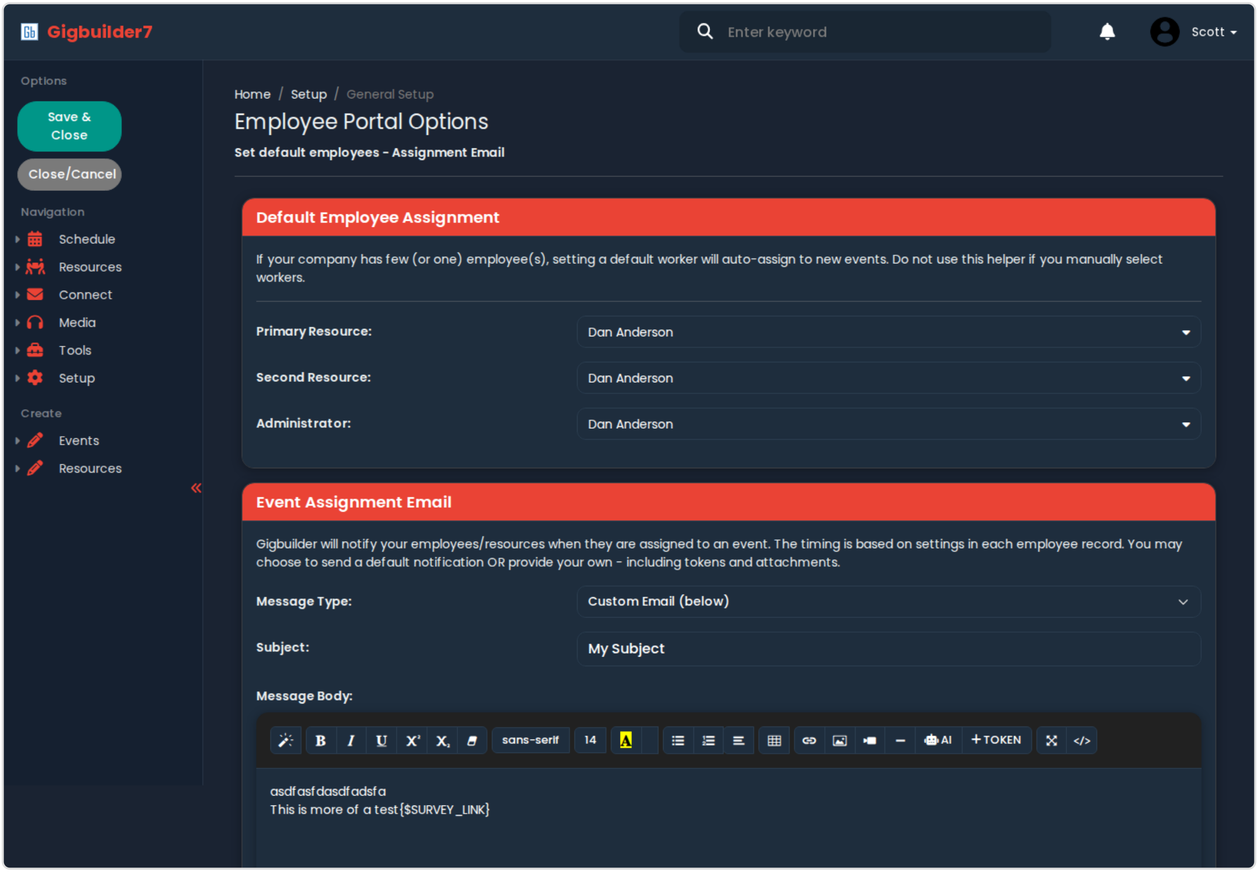
Issue: Dropdown menus show irrelevant or test values (e.g., "Auto Detailing" in payment options). **Cause:** Default placeholder values haven't been cleaned up. **Fix:** Scroll to Section 3 and edit each dropdown list. Remove anything that doesn't apply to your business.

Issue: Client links (contract, portal) are expiring too quickly. **Cause:** Link Expiration is set too short. **Fix:** Increase the Link Expiration value in Section 4. For contract links, 14–30 days is typical — clients often take a few days to review before signing.

Issue: Event status isn't changing when a deposit is paid. **Cause:** Deposit-Paid Helper is set to "Do Nothing." **Fix:** Change Deposit-Paid Helper to the desired status (e.g., "Status Booked") if you want Gigbuilder to advance the event automatically when payment is received.

Hints & Pro Tips

- **Set your most common event type as the default** — if 80% of your bookings are weddings, set Default Event Type to "Wedding." It saves a click on every new event.
- **Use "Deposit Wording" to match your brand** — calling it a "Retainer" or "Booking Fee" instead of "Deposit" can feel more professional depending on your market.
- **Link Expiration sweet spot for most businesses is 14–30 days** — long enough for clients to act, short enough to encourage timely response.
- **Turn on Inventory Control** if you manage multiple systems or rooms — it prevents accidentally booking more events than you have equipment to cover.
- **"Append Venue" in Meeting Helper** is a time-saver for site visits — the venue name automatically appears in the meeting title so you can glance at your calendar and know exactly where you're going.



Employee Options

Overview

Employee Options controls two things: which staff members are automatically assigned when a new event is created, and what email notification those staff members receive when they're assigned to an event. This page is particularly useful for solo DJs or small operations where the same person handles every event.

Section: Default Employee Assignment

When a new event is created, Gigbuilder can automatically pre-fill the staff assignment fields rather than leaving them blank.

Field	Description	Notes
Primary Resource	The main DJ or entertainer auto-assigned to new events	Set this if you are a solo operator or have one primary performer

Field	Description	Notes
Second Resource	A secondary worker auto-assigned alongside the primary	Optional — useful for events that always require two staff
Administrator	An admin staff member auto-assigned to new events	Typically the office manager or booking coordinator

> **Important:** Only use auto-assignment if the same person handles most (or all) events. If you manually assign different staff per event, leave these set to **None** — auto-assignment will overwrite your manual selections and cause confusion.

Section: Event Assignment Email

When a staff member is assigned to an event, Gigbuilder sends them a notification email. The timing of that email is controlled in each individual employee record. This section controls the *content* of that email.

Option	Description
Use Default Email	Gigbuilder sends a pre-built notification with the event's basic details and a login link (if the employee has portal access). Recommended for most users.
Custom Email (below)	Write your own subject and body using tokens. For advanced users who want to control exactly what information is included.

Tokens

Custom emails support **tokens** — placeholders that Gigbuilder replaces with real data when the email is sent. Click **Insert Token** to browse available tokens by category:

Token Category	What's Available
Event Summary	Date, time, status, event name
Event Details	Type, duration, setup time, notes
Event Client	Client name, phone, email
Client Records	Full client profile fields
Event Venue	Venue name, address, contact
Venue Records	Full venue profile fields
Event Human Resources	Assigned staff details
Paperwork / Post Production	Contract status, survey links
Event Pricing	Package, deposit, balance due
Accounting	Payment history, outstanding balance

Token Category	What's Available
Music	Song lists, playlists
Company Info	Your business name, phone, address

Example token usage:

```
Subject: You've been booked! — {$EVENT_DATE} at {$VENUE_NAME}

Hi {$EMPLOYEE_FIRST_NAME},

You're confirmed for a {$EVENT_TYPE} on {$EVENT_DATE} starting at {$EVENT_START_TIME}.
Client: {$CLIENT_FULL_NAME} — {$CLIENT_PHONE}
Location: {$VENUE_NAME}, {$VENUE_CITY}

Log in here: {$EMPLOYEE_LOGIN_LINK}
```

Common Issues & Workarounds

Issue: Every new event is being assigned to the wrong person. **Cause:** Default Employee Assignment is set to an employee who isn't the right fit for all events. **Fix:** Set all three fields (Primary, Second, Administrator) to **None** and assign staff manually per event. Or update the defaults to reflect your current primary performer.

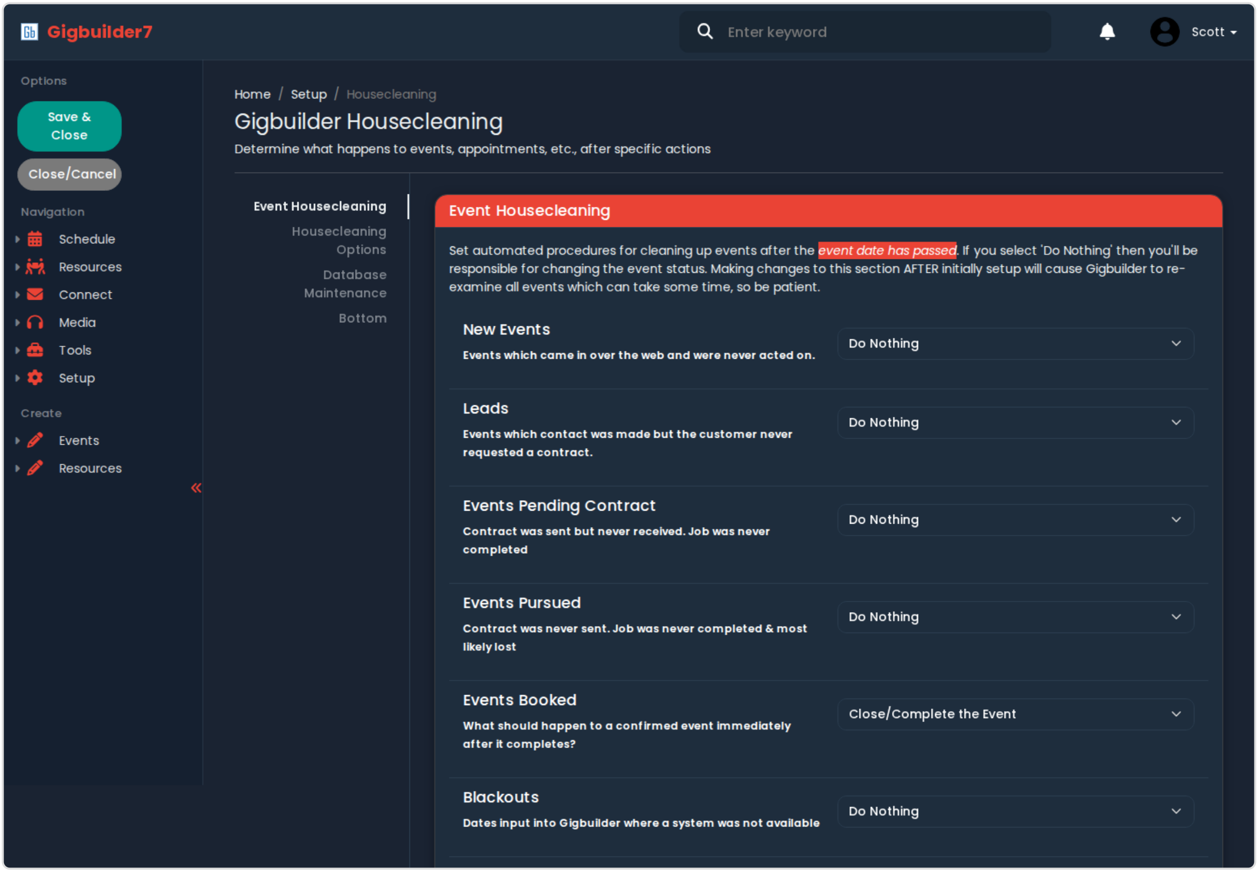
Issue: Staff say they're not receiving assignment emails. **Cause:** Notification timing is controlled in each employee's individual record, not here. **Fix:** Go to the employee's record and check their notification settings. This page only controls the email *content* — the *timing* is set per employee.

Issue: Custom email arrived with tokens showing as raw text (e.g., `{$EVENT_DATE}` instead of the actual date). **Cause:** Token was typed manually and may have a typo, or the wrong token name was used. **Fix:** Always use the **Insert Token** button to insert tokens rather than typing them — this guarantees the correct format and spelling.

Hints & Pro Tips

- **Solo DJs:** Set yourself as the Primary Resource so you never have to manually assign yourself to every new event — it happens automatically.
- **The default email is usually the right choice** — it's clean, professional, and includes a login link. Only switch to a custom email if you have specific information to include that the default doesn't cover.

- **Token emails are powerful for multi-employee operations** — you can send a richly detailed assignment email with every field the employee needs, reducing back-and-forth questions before the event.



Housecleaning

Overview

Housecleaning lets you define what Gigbuilder automatically does with records once their date has passed. Instead of manually closing out old leads, archiving completed events, or cleaning up past appointments, you configure the rules once and Gigbuilder handles it in the background.

There are two areas: **Event Housecleaning** (what happens to events and related records) and **Database Maintenance** (tools for keeping the system clean and fast).

Event Status Reference

Gigbuilder uses these statuses throughout Housecleaning. Understanding them is key to configuring the right rules:

Status	Meaning
Auto-Delete	Record is permanently removed

Status	Meaning
Auto-Archive	Record is moved to an archived state — still accessible but out of active views
Auto-Close	Record is marked closed/complete
Lost-Opportunity	Event is moved to the "Lost Opportunity" status — indicates the prospect didn't book, useful for tracking and reporting on why business was lost
Do Nothing	Record stays exactly as-is; no automatic action taken

---

Section: Event Housecleaning

Configure what happens to each record type after its associated date passes.

Events

These rules apply to events that were never converted to a booking — the primary use case is tracking lost business and keeping active queues clean.

Record Type	Description	Available Actions
New Events	Web inquiries that were never followed up on	Auto-Delete, Lost-Opportunity, Auto-Archive, Do Nothing
Leads	Prospects where contact was made but no contract was ever requested	Auto-Delete, Lost-Opportunity, Auto-Archive, Do Nothing
Events Pending Contract	Contract was sent but never signed or returned	Auto-Delete, Lost-Opportunity, Auto-Archive, Do Nothing
Events Pursued	Active pursuit but contract was never sent and job didn't complete	Auto-Delete, Lost-Opportunity, Auto-Archive, Do Nothing
Events Booked	Confirmed events that have now passed	Close/Complete Event, Change to Post Production, Do Nothing

> **Recommended approach for unbooked events:** Setting New Events, Leads, Pursued, and Pending Contract to **Lost-Opportunity** is more useful than Auto-Delete — it preserves the record for reporting and lets you analyze why inquiries didn't convert.
> **Recommended approach for booked events: Change to Post Production** is the most common choice — it moves the event into the post-event workflow (thank-you emails, surveys, reviews) rather than simply closing it out.

Other Records

Record Type	Description	Available Actions
Blackouts	Staff unavailability dates that have passed	Auto-Delete, Auto-Archive, Do Nothing

Record Type	Description	Available Actions
Purchase Manager	Song purchase notifications sent to the DJ before the event	Auto-Delete, Auto-Purchase, Do Nothing — **Auto-Purchase** sends the DJ a notification about songs that may need to be acquired before the event
Next Actions	Open follow-up tasks still attached to a past event	Auto-Delete, Do Nothing
Time Off Requests	Approved, declined, or pending time off after the dates pass	Auto-Delete, Auto-Complete, Do Nothing
Additional Event Forms	Unsigned signatures, open change requests tied to past events	Auto-Delete, Auto-Archive, Auto-Close, Do Nothing
Appointments	Past meetings, calls, and reminders	Auto-Archive, Auto-Close, Auto-Delete (3 Months / 6 Months / 1 Year / Immediately), Do Nothing
Tasks	Completed or past-due tasks	Leave Alone, Close Task, Delete Task

Section: Housecleaning Options

Update Everything

When you change housecleaning rules, the new settings normally apply only to future records. This option lets you apply the new rules retroactively.

Option	What It Does
Update Current and Past Events	Applies new housecleaning rules to all records, including historical ones
Update Current Events Only	Applies new rules to active records only, leaving historical records untouched

Remove Orphan Clients

An "orphan client" is a client record that isn't connected to any event — typically created by accident or left over from an import.

Option	What It Does
Instantly Remove	Permanently deletes all orphan client records
Do Nothing	Leaves them in place

> **Caution:** Use "Instantly Remove" only if you're confident those client records are truly unused. There is no undo. If in doubt, review orphan clients manually before running this.

Section: Database Maintenance

These tools keep your Gigbuilder database clean, fast, and fully indexed. They are safe to run at any time and are provided for your self-service use.

Tool	What It Does	When to Use
Run Search Refresh	Updates the search index with recent changes	Run if new records aren't appearing in search results
Run Search Rebuild	Completely rebuilds the search index from scratch	Run if search results seem incorrect or stale after a Refresh
Run DB Compact	Compresses the database to recover unused space and improve performance	Run periodically, especially after deleting large numbers of records
Run DB Fixup	Scans and repairs any corrupted or inconsistent documents	Run if you notice data anomalies or unexpected behavior
Run Fix Delete	Cleans up documents that were deleted but left residual data	Run if you're seeing ghost records or deletion-related oddities. **Note: this process takes a long time** — run it when you don't need the system for a while
Run Fix Actions	Repairs Next Action records that may have become disassociated	Run if next actions appear broken or won't close properly
View / Delete Cookies	View or clear Gigbuilder's browser cookies	Use if you're experiencing navigation or login issues
Test Email	Sends a test message to verify your email server is working	Run after any email configuration change
Setup Wizard	Walks through initial CRM configuration steps	Useful for new accounts getting started

Common Issues & Workarounds

Issue: Old leads and inquiries are clogging up active views. **Cause:** Housecleaning rules haven't been configured, so nothing is moving past-date records out of active queues. **Fix:** Set New Events, Leads, and Pursued to **Lost-Opportunity** or **Auto-Archive**. Then use "Update Current and Past Events" to apply the rules retroactively and clear the backlog at once.

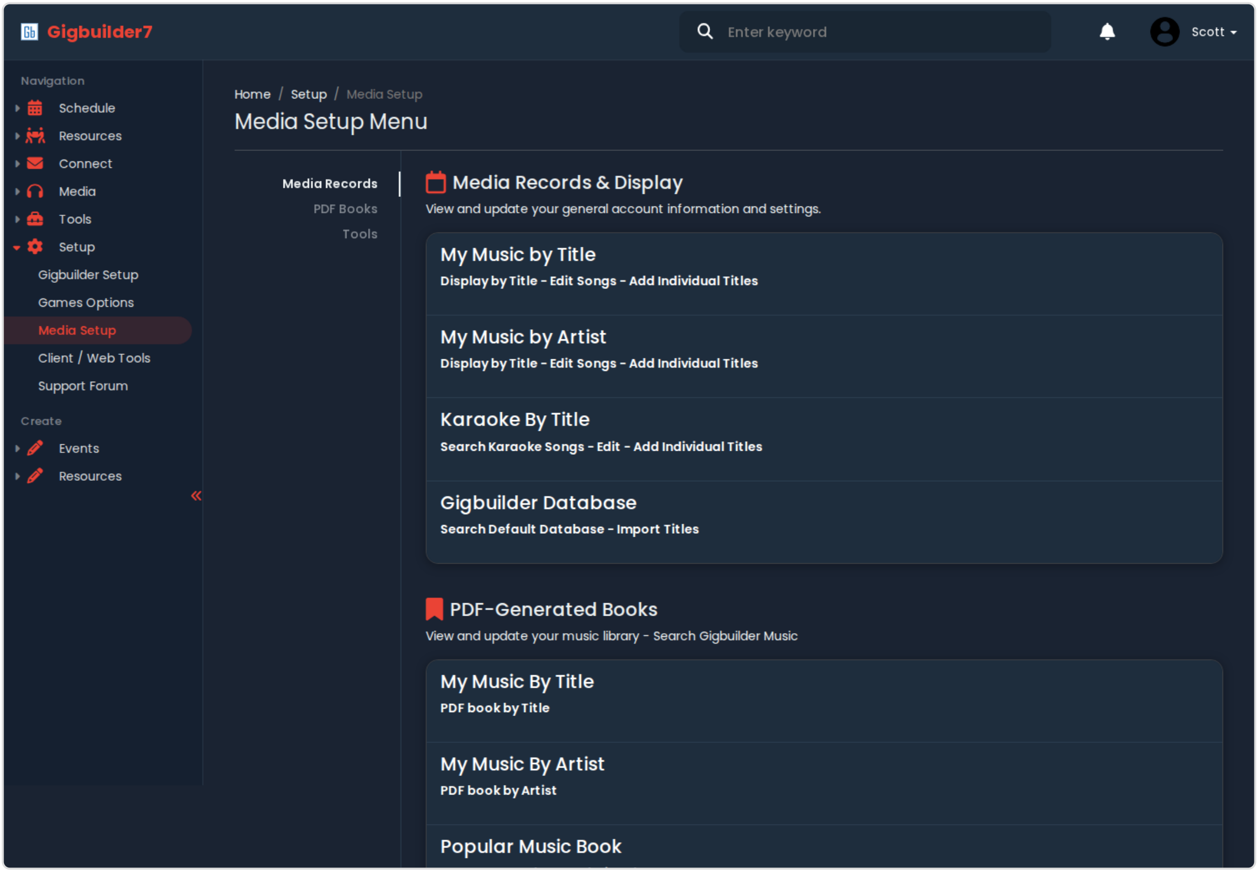
Issue: Search isn't finding records that definitely exist. **Cause:** The search index may be out of date. **Fix:** Run **Search Refresh** first. If that doesn't fix it, run **Search Rebuild**.

Issue: The CRM feels slow, especially when loading views with many records. **Cause:** The database may have accumulated unused space from deleted records. **Fix:** Run **DB Compact**. This is safe to do at any time and often makes a noticeable difference after heavy use or large-scale deletions.

Issue: DJ received a song purchase notification for a song they already own. **Cause:** The song isn't marked as owned in the music library. **Fix:** Update the song status in Media Setup → My Music to reflect that it's in the library. Future events won't generate a purchase notification for it.

Hints & Pro Tips

- **"Lost-Opportunity" is more valuable than "Auto-Delete"** for unbooked events — keeping those records lets you run reports on lost business and spot patterns (e.g., a lot of leads going cold at the contract stage might signal a pricing or follow-up issue).
- **Run DB Compact monthly** if you're a heavy user — it's the database equivalent of clearing your browser cache and keeps things running smoothly.
- **Set Booked Events to "Change to Post Production"** rather than "Close/Complete" — post production triggers your follow-up workflow (surveys, reviews, thank-yous) which is valuable for client retention.
- **"Fix Delete" is the slow one** — if you need to run it, do it at the end of the day or overnight. Everything else in the maintenance section is fast.



Media Setup

Overview

Media Setup is the control center for your music library in Gigbuilder. It lets you organize your song catalog, control what clients can request, generate printed or PDF music books, and import songs from external sources. A well-configured music library means faster event planning and better client experiences.

Music Library Views

Your library can be accessed and browsed in four ways:

View	Description
My Music by Title	Your personal catalog sorted alphabetically by song title
My Music by Artist	Your personal catalog sorted alphabetically by artist name
Karaoke by Title	Your karaoke song list sorted by title

View	Description
Gigbuilder Database	Gigbuilder's master music database — browse and import songs into your personal library

PDF Music Books

Gigbuilder can generate printable reference books from your music catalog — useful for giving clients a song list to browse, or for your own on-site reference.

Book Type	Contents
Music Library by Title	Your full catalog sorted by song title
Music Library by Artist	Your full catalog sorted by artist
Popular Requests List	Most-requested songs across your events
Karaoke Request Book	Your karaoke catalog formatted for client use

Configuration & Data Tools

Tool	What It Does
Music Database Selection	Choose which Gigbuilder music database libraries to draw from
Explicit Content Filter	Control whether songs with explicit content are included or excluded from client-facing lists
Client Request Limits	Set a maximum number of songs a client or guest can request for an event
Default Song Lists	Configure which song lists are applied by default to new events
Import from Spreadsheet	Upload your music catalog from a CSV or spreadsheet file
Import from Subscription Database	Pull songs from a connected music subscription service
Export to Spreadsheet	Download your full music catalog for backup or editing
Purchase Manager	Track songs that clients have requested but you don't yet own — so you can buy them before the event

Common Issues & Workarounds

Issue: Client submitted song requests that aren't in the library. **Cause:** Clients can sometimes request songs that aren't in your catalog. **Fix:** Use the Purchase Manager to track requested songs you don't own. It gives you a consolidated list of what to acquire before upcoming events.

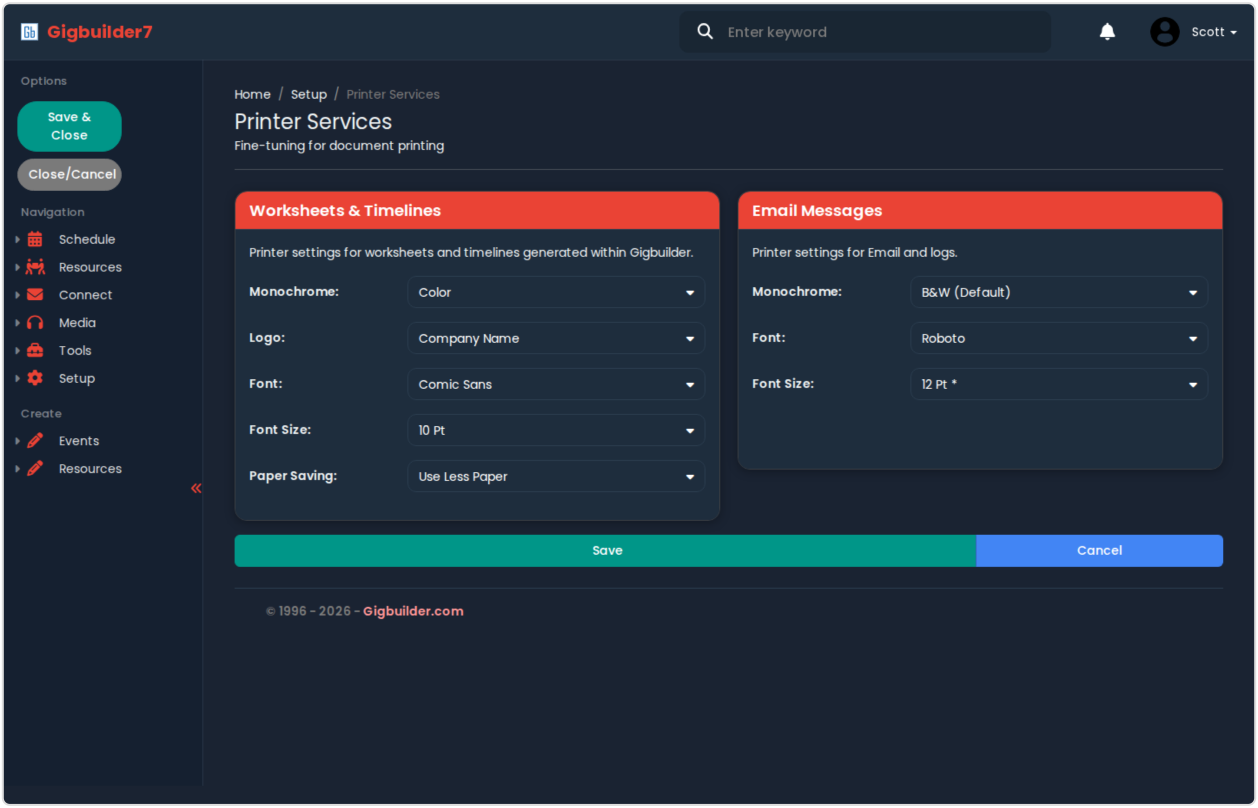
Issue: Explicit songs are appearing in the client request portal. **Cause:** Explicit content filter isn't enabled. **Fix:** Enable the explicit content filter in Media Setup. This applies to client-visible song lists and request forms.

Issue: Client is submitting too many song requests. **Cause:** No request limit has been configured. **Fix:** Set a Client Request Limit in Media Setup. You can also override this limit per event in the event record itself.

Issue: Music library is empty after setting up Gigbuilder. **Cause:** No songs have been imported yet. **Fix:** Use **Import from Spreadsheet** if you have an existing catalog in a spreadsheet, or browse the **Gigbuilder Database** and add songs directly from there.

Hints & Pro Tips

- **Generate a PDF music book for weddings** — giving engaged couples a curated list to browse dramatically reduces back-and-forth on song selections and gets them thinking about must-plays and do-not-plays early.
- **Use the Popular Requests list** to spot trends — if the same song keeps coming up across events, make sure it's in your library and ready to play.
- **Set a request limit** — uncapped requests can result in 200-song lists that are impossible to manage. A limit of 20–30 keeps things realistic for both you and the client.
- **The Gigbuilder Database is a great starting point** for new accounts — rather than building your library from scratch, search for songs you already know you have and add them quickly.
- **Export your catalog periodically** as a backup — it's easy to rebuild from a spreadsheet if anything ever needs to be restored.



Printer Services

Overview

Printer Services controls the visual appearance of documents Gigbuilder generates — specifically printed worksheets and timelines (used internally and shared with clients) and email messages. Settings here apply globally across all generated documents of each type.

There are two independent sections: one for printed documents, one for emails.

Section: Worksheets & Timelines

Controls how printed event documents look when generated as PDFs.

Field	Options	Notes
Color Mode	B&W (Default) / Color	Color prints your logo and any colored elements; B&W is safe for standard office printers
Logo	Company Logo / Company Name / Name & Logo	Choose what appears in the document header — your uploaded logo image, your company name as text, or both

Field	Options	Notes
Font	Arial, Cambria, Garamond, Georgia, Roboto, Times New Roman, Verdana, and more	Sets the typeface for all text in printed worksheets and timelines
Font Size	10pt, 11pt, **12pt** (default), 14pt, 16pt, 18pt	
Paper Saving	Use Less Paper / Always Page Break	"Use Less Paper" condenses content to reduce page count; "Always Page Break" starts each section on a new page for easier separation

---

Section: Email Messages

Controls the appearance of email correspondence generated by Gigbuilder (confirmations, contracts, reminders, etc.).

Field	Options	Notes
Color Mode	B&W (Default) / Color	
Font	Same options as above	Email fonts render differently across mail clients — Arial, Georgia, and Verdana are the safest choices for broad compatibility
Font Size	10pt, 11pt, **12pt** (default), 14pt, 16pt, 18pt	

Common Issues & Workarounds

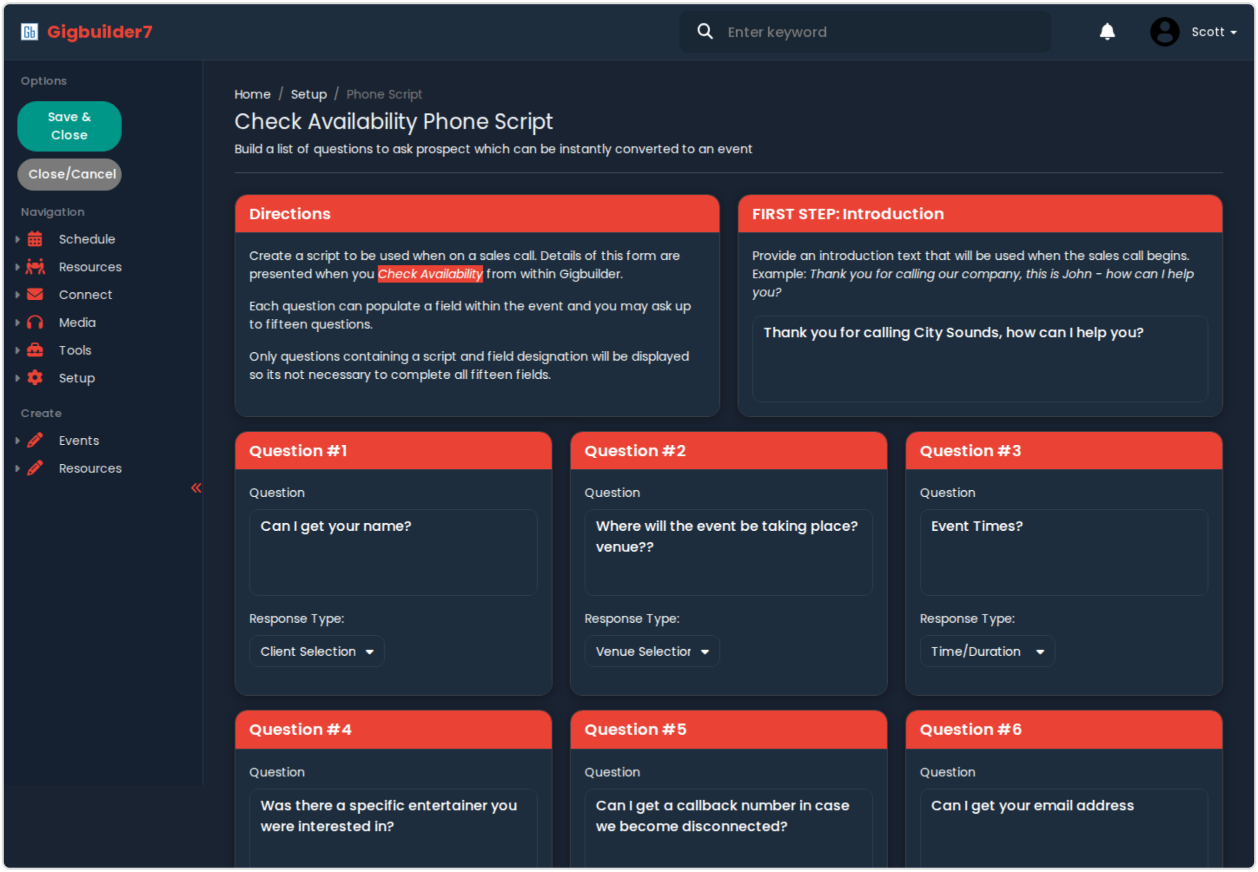
Issue: Printed worksheets are coming out hard to read — text too small or too large. **Cause:** Font size hasn't been adjusted from the default. **Fix:** Increase to 14pt for easier reading, especially if documents are printed and handed to clients at events.

Issue: Logo isn't appearing on printed documents. **Cause:** The logo image may not have been uploaded in Company Information, or "Company Name" is selected instead of "Company Logo." **Fix:** First confirm the logo is uploaded at Setup → Company Information. Then return here and switch the Logo setting to "Company Logo" or "Name & Logo."

Issue: Emails look different across Gmail, Outlook, and Apple Mail. **Cause:** Email clients render fonts differently — some don't support custom fonts at all. **Fix:** Stick to web-safe fonts: Arial, Georgia, Verdana, or Times New Roman. These render consistently across all major email clients.

Hints & Pro Tips

- **"Name & Logo" is the most professional option** for client-facing printed documents — it reinforces your brand name even if the logo is small or unclear when printed.
- **Use "Always Page Break"** if you're handing worksheets to staff at events — each section on its own page is much easier to navigate in the field.
- **12pt is the right default for most uses** — go to 14pt if your clients are older or if you're printing in low-light environments like event venues.
- **Color mode for emails is worth enabling** if your branding uses strong colors — it makes your communications more distinctive and visually polished.



Phone Script

Overview

The Phone Script is a guided call tool that appears when you run a **Check Availability** lookup inside Gigbuilder. It presents a structured list of questions to ask a prospect on the phone, and as you work through the script, the answers are automatically saved into the new event record — no separate data entry required after the call.

Think of it as a built-in sales call guide that creates the event for you while you're still talking to the prospect.

How It Works

1. A prospect calls to inquire about your availability
2. Open Gigbuilder and run **Check Availability**
3. The phone script appears on screen
4. Work through each question with the prospect

5. Each answer maps directly to an event field or appends to notes
6. When done, the event record is populated and ready — no re-entry needed

---

Section: Introduction

The first thing shown when the script opens. Write a natural greeting that matches how your business answers the phone.

Example:

> "Thank you for calling City Sounds Entertainment, this is Scott — how can I help you?"

Keep it short and conversational. This is a prompt for you, not something the prospect sees.

Section: Questions (Up to 10)

Each question has three parts:

Field	Description
Question	What you ask the prospect — write it as you'd actually say it
Response Type	What kind of answer you expect — controls how the input is captured
Save Into	Where the answer is stored in the event record

Response Types

Type	Use When
Do Not Use / None	Skip this question slot
Venue Selection	Answer involves looking up or selecting a venue from your database
Resource Selection	Prospect is requesting a specific DJ or entertainer
Client Selection	Linking to an existing client record
Event Worksheet Field	Answer maps to a specific field on the event form
Phone Numbers	Capturing a callback or event-day phone number
Type of Event	Wedding, birthday, corporate, etc.
Time / Duration	Event start time, end time, or length

Save Into Options

Option	Where It Goes
Name	Client's name field

Option	Where It Goes
Email Address	Client's email
Phone Numbers	Client's phone
Venue Selection	Event venue field
Type of Event	Event type field
Time / Duration	Event start time / duration
Event Name	The event title
Go-To-Person	The primary contact for the event
Greeting	Preferred name or salutation
Relation to Event	How the caller relates to the event (bride, planner, etc.)
Best Time to Call	Preferred callback time
Append to Event Notes	Adds the answer as a note — use this for anything that doesn't fit a specific field

---

Recommended Question Set

Gigbuilder includes a pre-built starting set. Customize to fit your sales process:

#	Question	Response Type	Saves To
1	Can I get your name?	—	Name
2	Where will the event be taking place?	Venue Selection	Venue
3	What time does the event start, and how long?	Time/Duration	Time/Duration
4	Was there a specific entertainer you were interested in?	Resource Selection	Resource
5	Can I get a callback number in case we get disconnected?	Phone Numbers	Phone
6	Can I get your email address?	—	Email Address
7	What type of event is this?	Type of Event	Event Type
8–10	*(customize for your business)*		

Common Issues & Workarounds

Issue: Questions are showing up but answers aren't saving into the event. **Cause:** The "Save Into" field may not be configured for that question, or "Do Not Use" is selected as the Response Type. **Fix:** Review each question's Response Type and Save Into mapping. Both must be set for data to flow into the event record.

Issue: A question I need doesn't fit any of the "Save Into" options. **Cause:** Some prospect information doesn't map to a standard event field. **Fix:** Set "Save Into" to **Append to Event Notes** — the answer will be added to the notes section of the event where it's still visible and searchable.

Issue: The script isn't appearing during a Check Availability lookup. **Cause:** Questions may not be saved, or all questions are set to "Do Not Use." **Fix:** Ensure at least one question has a Response Type set (not "Do Not Use") and save the script. Only active questions appear during calls.

Hints & Pro Tips

- **You don't need all 10 questions** — 5–7 focused questions keep the call moving. A prospect who feels interrogated may hang up.
- **Put venue and event type early** — these are the two pieces of information that most affect your availability and pricing, so get them on the table quickly.
- **"Append to Event Notes" is your catch-all** — any unusual detail the prospect shares that doesn't fit a field goes here. Better to capture it than lose it.
- **The script is a guide, not a rigid script** — let the conversation flow naturally and fill in answers as they come up organically rather than asking in strict order.
- **Customize the introduction** to match your actual phone greeting — a disconnect between what you say and what the script shows is distracting during a live call.