
Conference Programmer 4.5c/s

User's Manual

Seattle Technology Group, Inc.

www.seattletech.com (206) 324-4492 seatech@seattletech.com

1923 25th Avenue East
Seattle, Washington 98112

**Conference
Programmer
4.5c/s**

User's Manual

Table of Contents

1	General Information	1
1.1	Menu Bar	1
1.2	Toolbar	2
1.3	Tabs	2
1.4	The Post Button	2
1.5	Browse Tree	3
1.6	Main Window	3
1.7	Status Bar	4
1.8	Resizing Windows	5
1.9	Shortcuts	5
1.10	Wizards	7
1.11	Sort Fields	7
2	Participants	9
2.1	Selecting Participants	9
2.2	Entering Participants	12
2.3	Import Wizard	19
2.4	Deleting Participants	30
2.5	Moving Participants	30
2.6	Copying Participants	31
3	Conferences	33
3.1	Adding a Conference	33
3.2	Selecting a Conference	34
3.3	Delete Conference Wizard	36
3.4	Conference Related Functionality	40
4	Service Template	41
4.1	Setting Up a Service Template For Group Billed Conferences	41

Table of Contents

4.2	Setting Up a Service Template For Individual Billed Conferences.....	44
4.3	Custom Fields and Custom Values.....	45
5	Transaction Template	47
5.1	Setting Up a Transaction Template.....	47
5.2	Applying Charges To the Participant.....	52
5.3	Applying Charges To Both Conference and Participants.....	52
5.4	Applying Charges To a Subgroup.....	54
5.5	Creating Multiple Value Conditions.....	55
5.6	Setting Up No Show Charges.....	55
5.7	Setting Up Package Rates.....	56
5.8	Long Term Billing.....	57
6	Events Template	67
6.1	Creating Events.....	67
6.2	Deleting Events.....	68
6.3	Registering Participants For Events.....	69
6.4	Additional Quantities.....	69
7	Subgroups	71
7.1	Creating a Subgroup.....	71
7.2	Deleting Subgroups.....	74
7.3	Moving Subgroups.....	74
7.4	Assigning Participants To Subgroups.....	75
7.5	Searching For Subgroups.....	80
8	Reservation Calendar	83
8.1	Viewing the Reservation Calendar.....	83
8.2	Blocking Rooms.....	85

Table of Contents

8.3	Blocking Early and Late Arrivals and Departures	91
8.4	Blocking Doubles As Singles	91
8.5	Multiple Date Room Blocking.....	92
8.6	Blocking Rooms For Subgroups	93
8.7	Sorting the Rooms in the Reservation Calendar	95
8.8	Printing the Reservation Calendar	96
9	Room Assignments	99
9.1	Making Room Assignments From the Participant's Record	99
9.2	Making Room Assignments With the Reservation Calendar	100
9.3	Find/Assign Vacant Room.....	108
9.4	Find/Assign Blocked Room	109
9.5	Batch Assignments Wizard.....	111
9.6	Deleting a Room Assignment.....	113
9.7	Other Room Assignment Features	113
10	Billing	117
10.1	Group Billing.....	117
10.2	Individual Billing	124
10.3	Subgroup Billing.....	128
10.4	Combination of Conference, Subgroup, and Participant Billing.....	133
10.5	Editing and Deleting Charges	134
10.6	Payments	136
10.7	Charge Date Rules.....	139
10.8	Set Cash Box	141
10.9	Reconciling Charges and Payments.....	142

Table of Contents

11 Hotel Guest Wizard	157
11.1 Booking a Room Via the Hotel Guest Wizard.....	158
11.2 Checking In Hotel Guests	165
12 Contracts	171
12.1 Adding, Editing, and Deleting Contract Categories	171
12.2 Adding, Editing, and Deleting Contract Items	172
12.3 Conference Export Wizard	174
12.4 Merging Data Into a Contract.....	175
12.5 Creating a Contract Template	176
13 Meals Wizard	179
13.1 Creating a Dining Hall	179
13.2 Running the Meals Wizard.....	180
13.3 Editing Meal Counts	182
13.4 Multiple Dining Halls.....	182
13.5 Deleting Meals	184
14 Catering Wizard	185
14.1 Catering Items.....	185
14.2 Catering Menus.....	188
14.3 Catering Meetings	190
14.4 Catering Events.....	193
15 Meeting Facilities Wizard	199
15.1 Creating a Meeting Room	199
15.2 Entering a Resource	200
15.3 Reserving Meeting Facilities or Resources.....	201
15.4 Find Meeting Room Availability	205

Table of Contents

16 Reports	207
16.1 Viewing Reports	207
16.2 Exporting Reports.....	209
16.3 Adding New Reports	210
16.4 Report Folders	213
16.5 Editing Reports.....	215
16.6 Deleting Reports.....	217
17 Miscellaneous Functions	219
17.1 Changing a Field Label.....	219
17.2 Changing a Drop-Down List.....	219
17.3 Copying Elements Between Conferences.....	220
17.4 Security Wizard	221
17.5 Buildings And Rooms	226
17.6 Room Types	231
17.7 Accounts and Account Groups.....	232
17.8 Tax Rules	236
17.9 Checking Participants In and Out	238
17.10 Group Check-In/Out Wizard.....	240
17.11 Mark Rooms Cleaned Wizard	243
17.12 Computation Of Costs Wizard.....	245
17.13 Contact List	248
17.14 Email	251
17.15 Send Confirmations Wizard	259
17.16 Room Occupancy Statistics	265
17.17 Auto Numbering Routine.....	267
17.18 Interactive SQL Window.....	269
17.19 Tools Menu	271

Section 1: General Information

1 General Information

Conference Programmer is a very capable, very configurable program, and can look intimidating - there is a lot to learn! Don't worry, we'll cover everything step by step. Here is a standard Conference Programmer window (Figure 1-1).

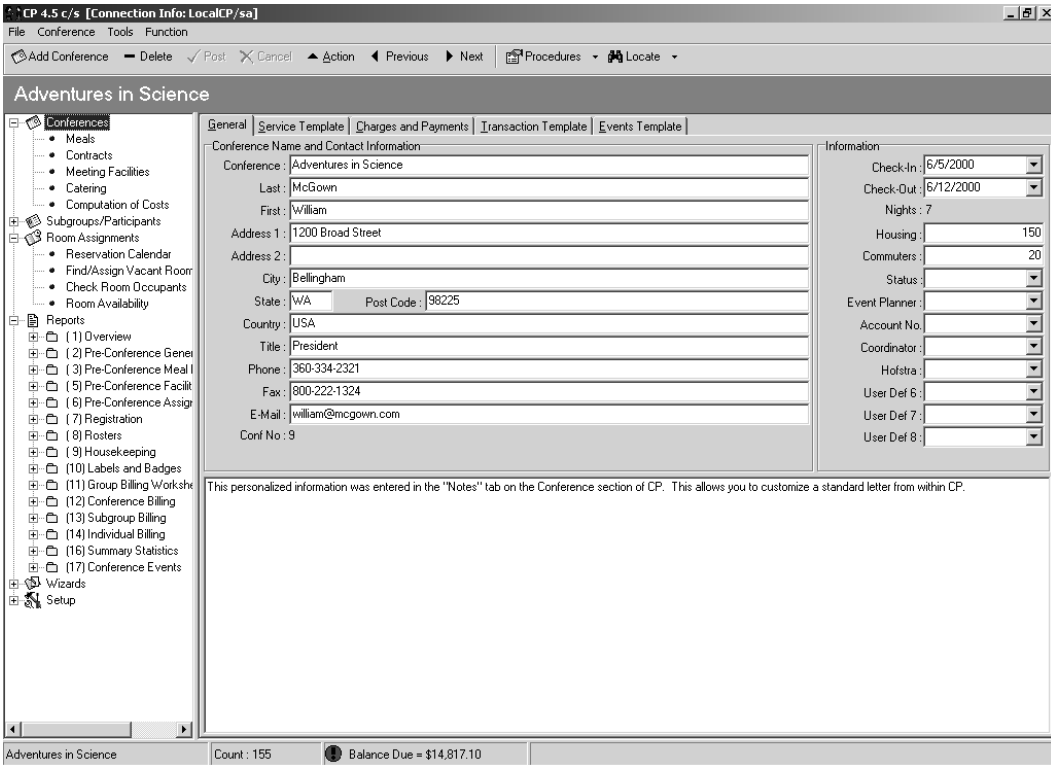


Figure 1-1

Although you will be looking at many different conferences and participants and other screens, the general layout will almost always be the same. Let's look at all the areas and how to use them.

1.1 Menu Bar

The top of the window contains the menu bar (Figure 1-2). The menus contain all the possible functions you can do, depending on where you are in Conference Programmer. The menus are contextual, which means you'll always see menus that relate to the area of Conference Programmer you are using.

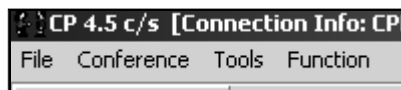


Figure 1-2

Section 1: General Information

1.2 Toolbar

The top of the window also contains buttons in a toolbar (Figure 1-3). Clicking on a button will perform that function, or will bring up a list of other, related functions you can choose from. For example, clicking the Delete button will delete whatever item is highlighted on the screen, but clicking the Action button will bring up a list of other functions you can perform on whatever item is highlighted on the screen.

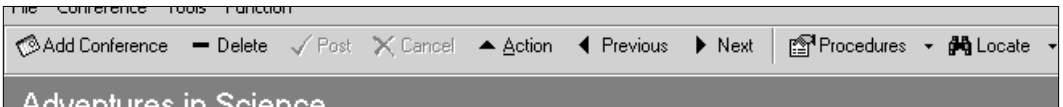


Figure 1-3

These buttons are contextual, which means you'll always see buttons that relate to the area of Conference Programmer you are in. You will see a different set of buttons when you are in the Participant screens than you will see when you are in the Conferences screens, and you will see a different set of buttons in the Conferences screen when you are in the General tab than when you are in the Charges and Payments tab.

1.3 Tabs

Tabs are sections of a screen. Figure 1-4, for example, shows that we are on the Conferences screen and looking at the General tab - the general conference information. Clicking the Charges and Payments tab will bring up a different set of information and options - the charges and payments for this conference.

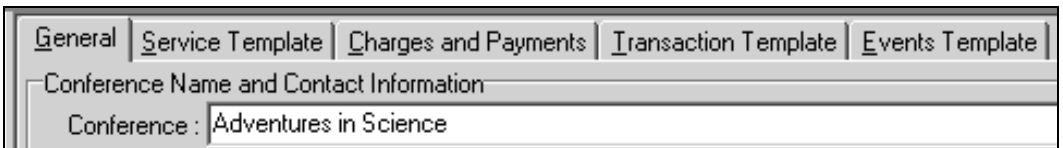


Figure 1-4

1.4 The Post Button

Whenever you make any changes to data in Conference Programmer, you must tell Conference Programmer to make the change take affect. For example, when you create a new participant and enter a first and last name, you must tell Conference Programmer that you are done typing the name; you must tell Conference Programmer to "post" that information to the database. If you change a participant's address or a room type or a

Section 1: General Information

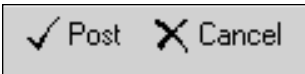


Figure 1-5

conference's date, you still have to post that information. You do so by clicking the Post button in the toolbar (Figure 1-5).



Figure 1-6

When there is no information to be posted - when no changes have been made to data that you are looking at - the Post button is gray and cannot be clicked (Figure 1-6).

1.5 Browse Tree

The left side of the Conference Programmer window is the browse tree (Figure 1-7). Each category of information is a branch in that tree. To see more information on that branch, click the plus symbol to the left of the branch to “expand” it - you will see more information about that branch. Figure 1-7 shows that we have expanded the Conferences section, the Room Assignments section, and the Reports section. You can see that the Reports section has other categories - sub-branches - that can be expanded to see further contents or details. You will probably use the browse tree every time you use Conference Programmer.

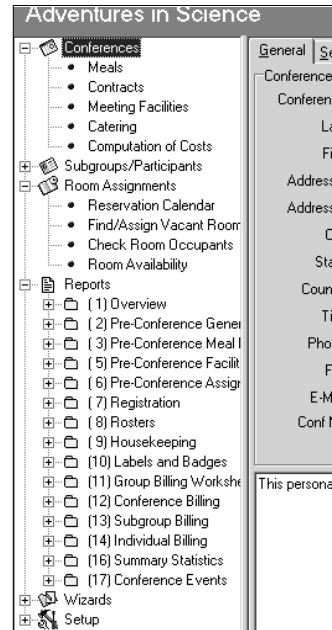


Figure 1-7

In this manual, when we say “expand the Participants area” or “expand Participants,” we want you to click the plus symbol next to Participants in the browse tree. When we say “click on Participants” we want you to move the mouse over the word “Participants” in the browse tree (so that the word “Participants” changes to blue and becomes underlined) then click the mouse button.

1.6 Main Window

The lower-right portion of the Conference Programmer window is the main portion (Figure 1-8) - it will display the information you are looking for, whether it is a conference, a participant, charges and payments, or a report. This portion of the window is also where you enter or edit all of the information you will be working with. The contents of this portion of the window are constantly changing as you use Conference Programmer.

Section 1: General Information

General	Service Template	Charges and Payments	Transaction Template	Events Template
Conference Name and Contact Information				
Conference :	Adventures in Science			
Last :	McGown			
First :	William			
Address 1 :	1200 Broad Street			
Address 2 :				
City :	Bellingham			
State :	WA	Post Code :	98225	
Country :	USA			
Title :	President			
Phone :	360-334-2321			
Fax :	800-222-1324			
E-Mail :	william@mcgown.com			
Conf No :	9			
Information				
Check-In :	6/5/2000			
Check-Out :	6/12/2000			
Nights :	7			
Housing :	150			
Commuters :	20			
Res-ID :				
Event Planner :				
Account No. :				
Coordinator :				
User Def 5 :				
User Def 6 :				
User Def 7 :				
User Def 8 :				
<ol style="list-style-type: none">4 masters needed at Registration.First Regis. in RA's apt. Biomed will go beyond our time on its own. MUST return keys and Reg. cards the next business day, before 12 noon, to avoid additional charges.2nd Regis on own. Find out when it is in order to provide signs on time.				

Figure 1-8

1.7 Status Bar

The very bottom of the Conference Programmer window is the status bar (Figure 1-9). It shows general information about your current work. For example, Figure 1-9 shows that we are working in the “Adventures in Science” conference, there 155 participants in this conference, and the conference’s balance is \$14,817.00. The information displayed here will change depending on what you are doing in Conference Programmer. It is a good idea to get in the habit of glancing down here to make sure you are in the correct conference before performing any functions - it would be time consuming to manually delete the 300 participants you accidentally imported into the wrong conference!

Adventures in Science	Count : 155	Balance Due = \$14,817.10
-----------------------	-------------	---------------------------

Figure 1-9

Section 1: General Information

1.8 Resizing Windows



Figure 1-10

You can maximize the Conference Programmer window so it takes up your entire screen, just as you can maximize any Microsoft Windows window. This gives you the most workspace. To do so, click the Maximize button - the middle button that looks like a square (a window) - in the top-right corner of the window (Figure 1-10).



Figure 1-11

To make the window smaller - and able to be resized to your liking - click the same button, which now looks like two overlapping squares (smaller windows) (Figure 1-11).

When the window is not maximized, you can resize it by placing the mouse over an edge of the window and clicking-and-dragging to stretch or shrink the size of the window.

Similarly, you can resize areas within the Conference Programmer window, even when it is maximized. When you move your mouse over areas that divide the Conference Programmer window into sections, the cursor changes from the standard arrow to other icons, depending on where the mouse is. When the mouse is over an area of the window that can be resized, the cursor changes to a double-sided arrow split by a perpendicular line. For example, if you want to make the browse tree wider, move the mouse between the browse tree and the main portion of the window until the cursor changes. Then hold down the mouse button, drag until the window reshapes to your liking, and then let go of the mouse button. There are other areas you can resize as well. Feel free to experiment - the changes you make to window sizes are not saved.

1.9 Shortcuts

There are many ways to do almost everything in Conference Programmer. Whatever part of Conference Programmer you are in, the buttons in the toolbar change to show what you are able to do; you can click one of these buttons. The menus in the menu bar and their contents also change; you can select a menu item. When you click the right mouse button ("right-click") almost anywhere on the screen, a list of current possible commands appears; select one. The browse-tree contains many wizards, reports, main screens, and setup items; expand the tree and click on the item you want to work with. There are also keyboard shortcuts for many of the functions in Conference Programmer; hit the special key-combinations to run that function. Key-command shortcuts can be found in the menus. If

Section 1: General Information

a menu item has a key-command shortcut, the shortcut is notated next to the menu item. The letters “Ctrl” stand for “control” and mean the control key on your keyboard, so “Ctrl+N” means hold the control key on the keyboard down and press the N key.

When you are working in a Conference Programmer screen that has many fields, if you press the Tab key on the keyboard, your cursor will jump to the next field. Hold the Shift key on the keyboard down while pressing the Tab key to go to the previous field.

With some items in Conference Programmer, double-clicking the item starts the main function. For example, if you double-click a charge in the Charges and Payments tab of a conference, subgroup, or participant, the Action dialog appears - which is that same thing that happens when you click once on the charge and click the Action button in the toolbar.

There are a number of wizards and procedures that act on multiple items. For example, Figure 1-12 shows the Auto Charge wizard, which acts on multiple participants. You can use the mouse to check or uncheck all the appropriate checkboxes in lists such as this one, or you can use the

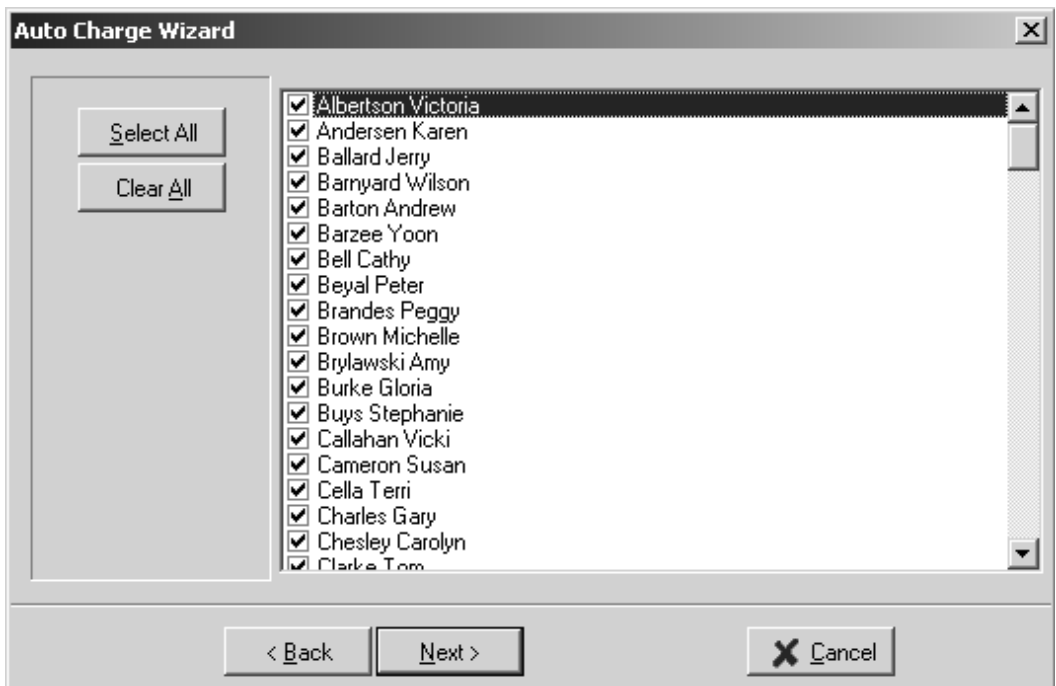


Figure 1-12

Section 1: General Information

keyboard for a quicker method. Click the mouse on the first item in the list so that it is highlighted. When you press the space bar on the keyboard, the checkbox for the highlighted item toggles between being checked and unchecked. When you press the up- or down-arrow keys on the keyboard, the highlighted selection moves up or down, respectively. You can quickly scroll through the listed items, checking or unchecking the checkboxes, using the space bar and the up- and down-arrows on the keyboard.

1.10 Wizards

A lot of the functions in Conference Programmer need to be performed a large number of times - for each participant, for example. There are wizards to automate those processes for you. When you launch a wizard, the first window that appears tells you that you are about to run a wizard that performs certain features, and it also informs you which conference you will be performing those features on. It is a good idea to read the first screen of any wizard until you become familiar with what the wizards do.



Figure 1-13

If you want to cancel a wizard without finishing it, you can click the Cancel button. You will be asked if you want to “terminate the process” (Figure 1-13). This sounds scary, but is really only asking if you want to end the wizard before it gets a chance to complete its process. Sometimes you will be asked if you want to “terminate the process” when you didn’t even know you were in a wizard;

some processes in Conference Programmer run wizards behind the scenes, but still allow you to cancel if you need to. Some wizards even run other wizards.

1.11 Sort Fields

By default, all items that appear in lists have a Sort field, with the value set to 0 (zero). For example, the rooms in a building are not listed in order of room number (because some rooms have hyphens or alphabetic characters); instead, they are listed in the order of their sort field. If you leave the default value, the items will be displayed in the order in which they are entered into Conference Programmer. To have the items display in a custom order, enter a number into the Sort field - lower numbers sort first. If you have multiple items with the same Sort field number, those items will sort themselves by the order in which they were entered. For example, if you have one item with the Sort field set to 1, three items with the Sort field set

Section 1: General Information

to 2, and one item with the Sort field set to 3, the item with 1 will display first, then the three items with the Sort field set to 2 will display (and these will display in the order in which they were entered into Conference Programmer), then the item with the Sort field set to 3 will display.

Section 2: Participants

2 Participants

2.1 Selecting Participants

There are four ways to select a participant. Use the “Select Participant” method to choose from a list of all the participants for the current conference. Use the “Global Select Participant” method to find a participant in any conference. Use the “Participant Search” method to search for participants that match criteria you choose. You can also select a participant by browsing through a conference’s entire participant list.

Select a Participant From the Current Conference

Use the “Select Participant” method when you want to choose from a list of all participants in a particular conference. Before you begin, open the conference that the participant is in by clicking the Locate button on the toolbar (Figure 2-1) and selecting Select Conference, then click on the conference you want to work with and click the OK button.



Figure 2-1

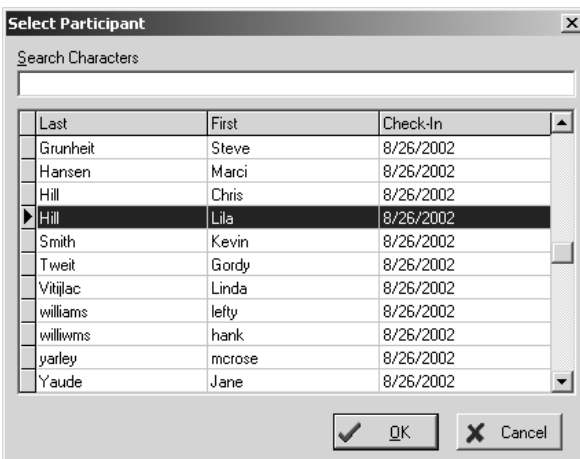


Figure 2-2

1. In the browse tree, click Subgroups/Participants.
2. Click the Locate button on the toolbar (Figure 2-1) and select Select Participant. The Select Participant window will open (Figure 2-2). Only those participants attending the conference you are currently working with will appear in this list.

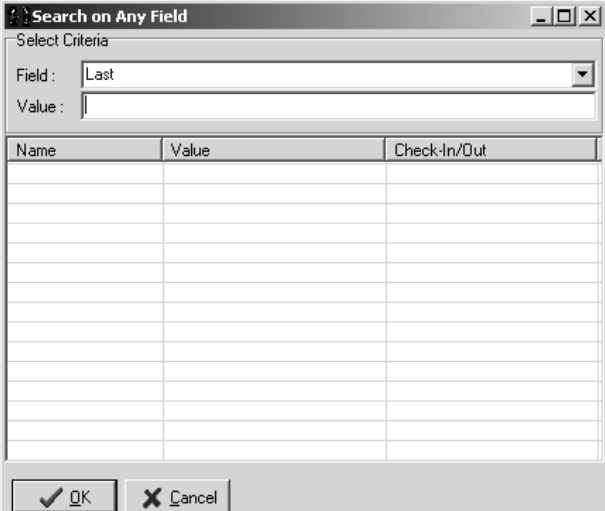
Section 2: Participants

3. To find the participant you want, type the first few letters of their last name - the list automatically scrolls to the names that begin with the letters you typed. You can use the up and down arrows on the keyboard to scroll through the list, or you can use the mouse to scroll through the list.
4. When you find the desired participant, click their name and then click the OK button (or double-click their name). The participant's record will be displayed, and the Select Participant window will close.

Global Select Participant

Use the "Global Select Participant" method when you want to search the entire Conference Programmer database for a participant in any conference.

1. In the browse tree, click Subgroups/Participants.
2. Click the Locate button on the toolbar (Figure 2-1) and select Global Select Participant. The Select Participant window will open (Figure 2-3).
3. In the field called Field, select the field you want to search.
4. In the Value field, type a value to search for, then click the OK button. A list of participants who meet the search criteria, if any, appear in the bottom part of the window (Figure 2-4).
5. When you double-click on a participant's name, that participant's general information fills the screen behind the Search on Any Field window, so you can look at the rest of their information to assure this is the participant you are really looking for.



Name	Value	Check-In/Out

Figure 2-3

Section 2: Participants

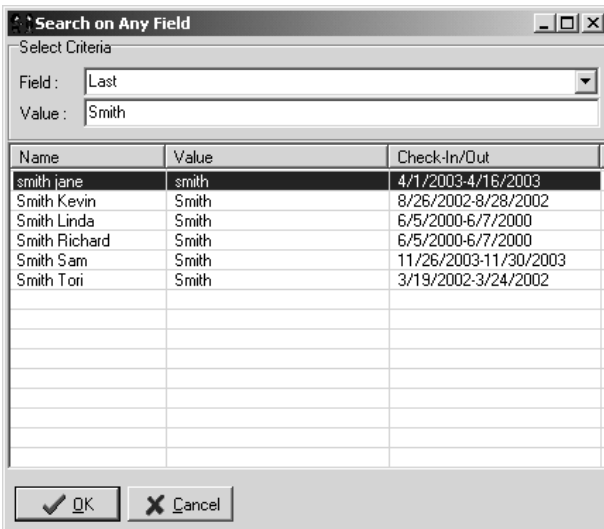


Figure 2-4 **Participant Search**

You may need to locate a participant but not know their last name. Even worse, you may not know what conference they are attending. With Conference Programmer you have the ability to search for a participant by the value of any field. For example, you can use this feature to search for all individuals from Las Vegas or from the state of Washington.

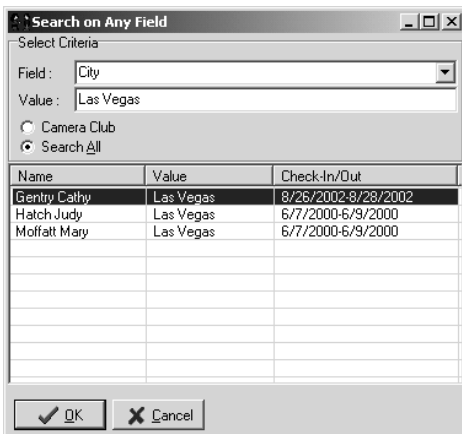


Figure 2-5

searching, type a % before the characters. For example, type “%smith” to find last names like “Smith” and like “Woodsmith.”

6. When you are done searching, click the Cancel button to close the Search on Any Field window.

Note: When you select a participant, the conference they are attending is also opened (and the conference you were previously working with is closed). After using Global Select Participant, always check what conference is open by glancing at the status bar on the bottom of the Conference Programmer window.

1. In the browse tree, click Subgroups/Participants.
2. Click the Locate button on the toolbar (Figure 2-1) and select Participant Search. The Search on Any Field window will open (Figure 2-5).
3. In the field called Field, select the field you want to search.
4. In the Value field, type a value to search for.

5. Choose the conference name to search for a participant in that conference, or choose “Search All” to search for a participant in any

Section 2: Participants

conference. Click the OK button. A list of participants who meet the search criteria, if any, appear in the bottom part of the window. Figure 2-5 shows three participants whose address is in Las Vegas.

6. When you double-click on a participant's name, that participant's general information fills the screen behind the Search on Any Field window, so you can look at the rest of their information to assure this is the participant you are really looking for.
7. When you are done searching, click the Cancel button to close the Search on Any Field window.

Browse the List of Participants

While on a particular conference, you can scroll through the participant list under Subgroups/Participants in the browse tree. Before you begin, open the conference that contains the participants you want to browse through by clicking the Locate button on the toolbar and selecting Select Conference, then click on the conference you want to work with and click the OK button. Also, make sure that "Do not list subgroups and participants in the browse tree" in *not* checked in the Tools menu.

1. In the browse tree, expand Subgroups/Participants - you will see a list of participants in this conference (Figure 2-6).
2. To move through the list in alphabetical order (A-Z), click the Next button on the toolbar. Or you can hold the Control key on the keyboard down and then press the "N" key (ctrl-N) to move to the next record alphabetically.
3. To move through the list in reverse alphabetical order (Z-A), click the Previous button on the toolbar. Or you can hold the Control key on the keyboard down and then press the "K" key (ctrl-K) to move to the previous record alphabetically.

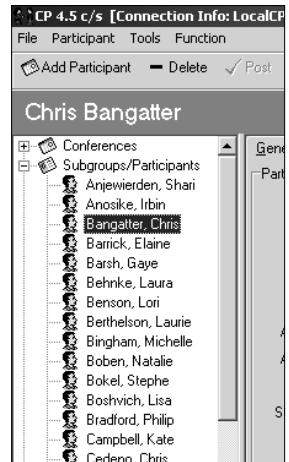


Figure 2-6

2.2 Entering Participants

There are three ways to enter participants. You can enter one participant at a time by clicking the Add Participant button on the toolbar, you can run the Batch Participant Entry wizard to quickly enter many participants, and you can import participants (and possibly other information as well, such as gender and room assignment) by running the Import wizard.

Section 2: Participants

Add Participant

Clicking the Add Participant button is the easiest way to enter a just a few participants. It works well for walk-in registrations or last minute entries. Before you begin, make sure you are working with the correct conference.

1. In the browse tree, click Subgroups/Participants, then click the General tab.
2. Click the Add Participant button on the toolbar. A blank Participants General tab will be displayed (Figure 2-7).
3. Enter information for the participant.

The screenshot shows a software interface for adding a participant. The window has a title bar with tabs: General, Additional Info, Charges and Payments, and Events. The 'General' tab is active. The form is divided into several sections:

- Participant #6252**: A section for personal information with fields for Last, First, Gender (dropdown), Age, Title, Affiliation, Address 1, Address 2, City, State/Prov, P. Code, Country, Phone, Fax, E-Mail, Roommate, and Last.
- Arrival and Assignments**: A section for scheduling with fields for Building (dropdown), Rm (dropdown), Check-In (3/15/2002), Check-Out (3/18/2002), Nights (3), Status (dropdown), and Via (dropdown).
- Lookup Information**: A table with two columns: 'Lookup Information' and 'Item'. The table is currently empty.
- Status**: A section with checkboxes for Checked-In, Checked-Out, and Conf Sent.

At the bottom of the window, there is a status bar with the text 'Count : 15' and 'No Balance'.

Figure 2-7

The Check-In and Check-Out fields are automatically filled in with the dates of the conference. You can change these dates for each individual if, for example, they are arriving or leaving early or late.

Section 2: Participants

The only required fields are the First and Last fields (the first and last name of the participant), but if you are working with an individual billed conference, you may want to collect their address and other billing and contact information.

4. A participant's Additional Info tab contains many other fields, each of which can contain information that is useful to track or that is mandatory in order to automate charging. When you enter a new participant, the Service Template automatically fills in some of those fields for you (see Section 4: Service Template). Click the Additional Information tab to make any changes that are necessary on an individual participant basis.
5. To register the participant for one or more events, click the Events tab (see Section 6.3: Registering Participants For Events).
6. When you are done entering information for this participant, click the Post button on the toolbar. To add another participant, press the F5 key on the keyboard (this is the same as clicking the Add Participant button on the toolbar).

When you are finished with the last participant, don't press the F5 key or click the Add Participant button again. If you do, Conference Programmer brings up another blank screen and begins the process of creating a new participant. If you try to go to another part of Conference Programmer, an error will appear in an Information window (Figure 2-8).

Whenever you receive this message in Conference Programmer, click the OK button to close the window, and then click the Cancel button on the toolbar to cancel your changes, or click the Post button on the toolbar to post your changes.



Figure 2-8

Batch Participant Entry

The Batch Participant Entry wizard is the most efficient method to manually enter a number of participants. Perhaps you received a hand-written list of names of participants from your conference contact, or from your front desk staff after a conference checked-in. The Batch Participant Entry wizard allows you to very quickly enter these names.

Section 2: Participants

1. In the browse tree, expand Wizards and click Batch Participant Entry. The wizard window opens (Figure 2-9).

Norwest Ski Extreme

This wizard provide a high speed data input screen for entering participants. Select the fields which you have values to input.

Norwest Ski Extreme

Check-In : 3/15/02

Check-Out : 3/19/02

Building :

Default Values :

Linen = Economy
Room Type = Double

Last
 First
 Gender
 Check-In
 Check-Out
 Address 1
 Address 2

< Back Next > X Cancel

Figure 2-9

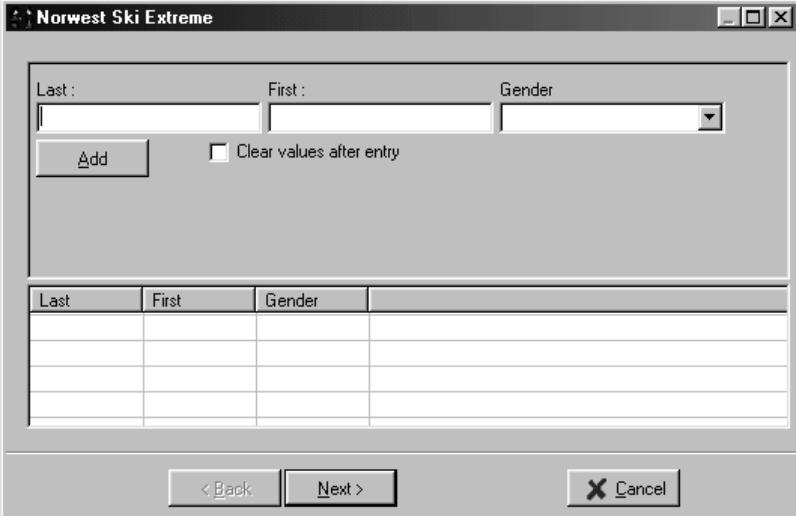
The Check-In and Check-Out fields are automatically filled with the conference check-in and check-out dates. If you are entering a number of participants who are checking in or out early or late, you can change the Check-In or Check-Out fields to reflect the correct dates.

The Building field is empty by default. If you want to assign each participant in the same building, you can select that building in the Building field. It is a good habit to use this field only when you plan to assign all participants in the same building.

The Default Values area lists all Service Template items for this conference (see Section 4: Service Template). When you finish entering participants in this wizard, each of the values listed in the defaults values area will automatically be entered for each participant.

2. The bottom portion of the wizard window lists all fields that can possibly be entered for a participant. If you check the checkbox next to a field, that field will appear in the next screen of the wizard, ready for you to enter data. You want to check only the fields for which you have data to enter. In this example, we have checked only the Last, First, and Gender fields' checkboxes. Click the Next button to move to the data entry screen of this wizard (Figure 2-10).

Section 2: Participants



The screenshot shows a window titled "Norwest Ski Extreme". At the top, there are three input fields labeled "Last:", "First:", and "Gender". Below these fields is an "Add" button and a checkbox labeled "Clear values after entry". At the bottom of the window, there is a table with three columns: "Last", "First", and "Gender". Below the table are three buttons: "< Back", "Next >", and "X Cancel".

Figure 2-10

3. Enter your participants' information in the appropriate fields. Press the Tab key on the keyboard to move to the next field (you can hold the Shift key on the keyboard down and then press the Tab key to move to the previous field). Our example has two genders automatically ready to use: "M" and "F". In the Gender field, you can type "M" or "F," or click the arrow and select the gender from the drop-down menu.

Check the "Clear values after entry" checkbox when entering a number of participants that do not share information (the "Clear Values After Entry" checkbox is described in a few pages).

4. When you are in the last field, pressing the Tab key on the keyboard will enter the participant into the list on the bottom portion of the window and move the cursor to the first field for the next participant (Figure 2-11).
5. When you are done entering participants, click the Next button. The wizard will process each participant from the list on the bottom portion of the window into Conference Programmer, and placing a checkmark next to each participant as they are processed (Figure 2-12).
6. At this point, you can either enter more participants in the top portion of the window, and then click the Next button again to enter them, or simply click the Next button to finish the Batch Participant

Section 2: Participants

Entry wizard. It may be advantageous to enter your participants in small groups (enter a few participants, then click the Next button to process them, then enter a few more participants and click the Next button again to process them, etc.).

Last	First	Gender	
• Dawson	Pete	M	
• Prescott	Jenny	F	
• Blohm	Leslie	F	
• Willet	George	M	

Figure 2-11

Last	First	Gender	
✓ Dawson	Pete	M	
✓ Prescott	Jenny	F	
✓ Blohm	Leslie	F	
✓ Willet	George	M	

Figure 2-12

Field Selection

If you want to enter more information about each participant when you use the Batch Participant Entry wizard, check the checkboxes next to the

Section 2: Participants

appropriate fields when you first open the wizard. You can also change the order in which you enter data into the fields on the data entry screen. The fields appear on the data entry screen in the order they are listed in the checkbox screen. To change their order, click on the field name you want to move, hold the mouse button down, and drag the field name up or down. Let go of the mouse button when the field name is in the position you want. Figure 2-13 shows that we checked the checkboxes for the Last, First, Gender, City, State\Prov, and Postal Code fields, and that we made sure they were listed in that order.

Last	First	Gender	City	State/Provi...	Postal Code

Figure 2-13

Using the “Clear Values After Entry” Checkbox

When the “Clear values after entry” checkbox is not checked, all fields entered in the data entry screen (except for the Last and First fields) will remain filled in from one participant to the next. Suppose you have a list of participants sorted by City, State/Prov., and Postal Code. Make sure the “Clear values after entry” checkbox is not checked and enter the information in the appropriate fields for the first participant. After entering information in the last field and pressing the Tab key on the keyboard, you will only need to enter the Last and First fields for the next participants - the other fields maintain their values until you make a change (Figure 2-14).

Section 2: Participants

The screenshot shows a window titled "Norwest Ski Extreme" with a form for entering participant information. The form has fields for Last, First, Gender, City, State/Prov, and P. Code. Below the form is an "Add" button and a checkbox for "Clear values after entry". Below the form is a table with columns: Last, First, Gender, City, State/Provi..., and Postal Code. The table contains five rows of participant data. At the bottom of the window are buttons for "< Back", "Next >", and "X Cancel".

Last	First	Gender	City	State/Provi...	Postal Code
• Cannon	Pete	M	Bellingham	WA	98777
• Badgley	Paul	M	Bellingham	WA	98777
• Russel	Shane	M	Seattle	WA	98105
• Schlietweiler	Dick	M	Seattle	WA	98105
• Dewitt	John	M	Seattle	WA	98105

Figure 2-14

In this example, all the participants from Bellingham, WA were entered, then the Seattle, WA participants were entered. When you have a large number of participants with similar information, this is a great time saver. In this example, all our participants will be entered into Conference Programmer and we will only need to enter a street address for each participant, not a city, postal code, or state.

Import Wizard

The import wizard is important enough, and complex enough, to be described in its own section.

2.3 Import Wizard

This is the most ideal way to enter participants into Conference Programmer. The Import wizard allows you to enter participants and make room assignments without any manual input. Before running the Import wizard, several preparatory steps must be taken, but it still saves you a great deal of time and prevents mistakes compared with entering all the names for a large conference manually. The first step in the process is to prepare an Excel file containing a list of pre-blocked rooms; you will give this Excel file to your customer and they will enter their own names and do their own room assignments.

Section 2: Participants

Exporting a Room List File to Excel

1. Block beds for the conference or subgroup (see Section 8.2: Blocking Rooms).
2. In the browse tree, expand Reports, then expand report folder 6 - "Pre-Conference Assignment Planning." Open the "Assignment Export" report (or the "Assignment Export-Subgroups" report if you blocked beds for subgroups) (see Section 16: Reports).
3. With the report open, click the Options button on the toolbar and select Export. The Export window will open (Figure 2-15).

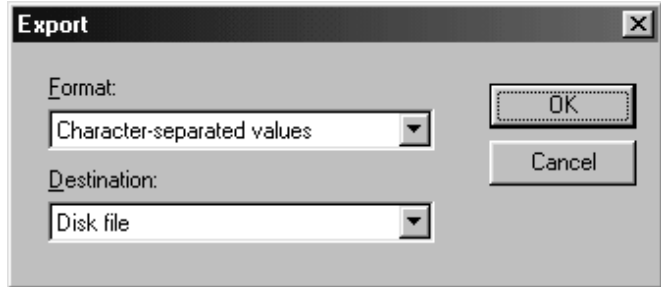


Figure 2-15

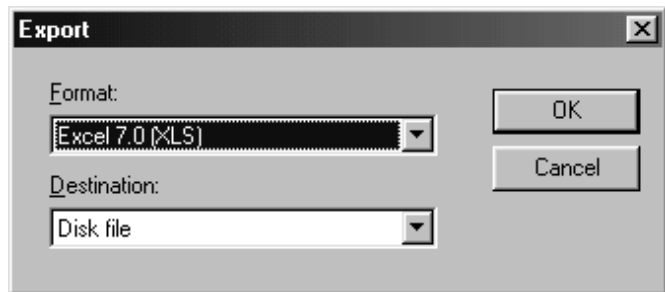


Figure 2-16

4. In the Format field, select a version of Microsoft Excel to export to. We recommend version "7.0 (XLS)" (Figure 2-16).
5. Make sure the Destination field is set to "Disk file." This means that you will export the report to an Excel file on your computer. Click the OK button. The Choose Export File window will open (Figure 2-17). This window will look different in different versions of Microsoft

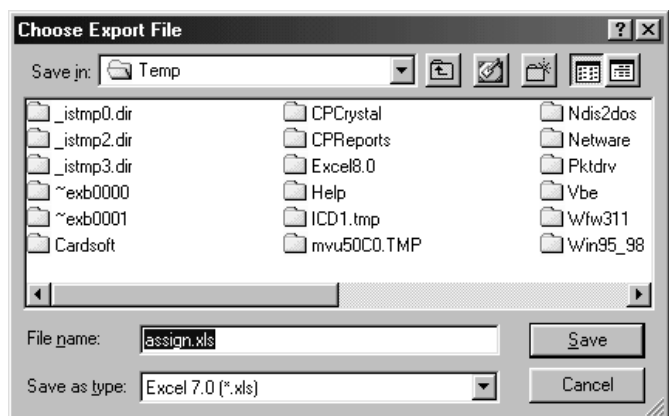


Figure 2-17

Section 2: Participants

Windows. If your window looks different than Figure 2-17, it should look exactly like the windows you are familiar with when you save files in Microsoft Word or in your email program.

6. In the Save In field at the top of the window, you should change the destination to your Desktop, or a location on your network. You might even consider creating a specific folder just for these export files. The reason is that this file will only be needed temporarily, and you will want it easy to find. In this example, we will save the file to our Desktop. In the File Name field, type the name of the file you want to save; the name your customer will see. We recommend using the name of the conference you are creating the file for. In this example, we call the file "Pharmaceutical Association" (Figure 2-18).

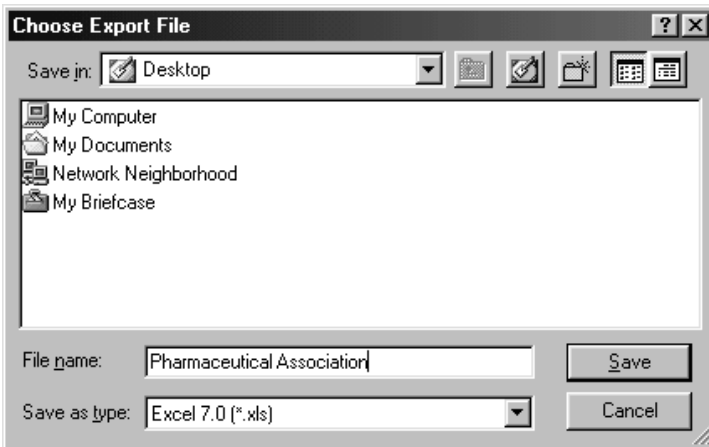


Figure 2-18

7. Click the Save button. After the report is exported, click the Close Report button on the toolbar to close the Assignment Export report.

You will find the new Excel file on your Desktop or wherever you chose to save it in step 5. In this example, our Pharmaceutical Association Excel file is located on our desktop (Figure 2-19).



Figure 2-19

Section 2: Participants

Entering Participants Names in Excel

Attach the Excel file you created in the previous section (“Exporting a Room List File to Excel”) to an email message or save it to a floppy disk and send it to your conference contact. Instruct your conference contact to enter the Last and First names and Gender of the participants planning to attend the conference. Remember, the default genders are “M” and “F,” not “Male” and “Female” - you should inform your conference contact of this (Figure 2-20).

	A	B	C	D	E	F	G	H	I	J
1	Building	Room No	Last	First	Gender	Room Type	Room Style	Phone	Check In	Check Out
2	W	0730A				Double		7381	6/4/02	6/7/02
3	W	0730A				Double		7381	6/4/02	6/7/02
4	W	0720B				Double		7011	6/4/02	6/7/02
5	W	0720B				Double		7011	6/4/02	6/7/02
6	W	0710B				Double		7357	6/4/02	6/7/02
7	W	0710B				Double		7357	6/4/02	6/7/02
8	W	0740C				Double		7722	6/4/02	6/7/02
9	W	0740C				Double		7722	6/4/02	6/7/02
10	W	0740A				Double		7722	6/4/02	6/7/02
11	W	0740A				Double		7722	6/4/02	6/7/02

Figure 2-20

At this point, your customer - the conference contact - is responsible for all data entry. They type all their participants' names, so they are responsible for correct spelling. They also make their own room assignments, by typing their participants' names next to a room number, so they are responsible for assigning roommates correctly, placing genders around bathrooms correctly, etc.

Instruct your contact to pay close attention to the room numbers as they enter the participants. As they enter names, they will be making the room assignments and pairing roommates in the process. Instruct them NOT to put participant names in quotations. This is not necessary and will cause undesired results when trying to sort the names alphabetically in Conference Programmer

If a participant requires different check-in or check-out date, they can be changed in the Excel file. When the file is imported into Conference Programmer all the information for each participant can be imported, including their room assignment and check-in and check-out dates.

Microsoft Excel has function called “Protection.” It is easy to learn and enables you to lock portions of a spreadsheet so that another user cannot change them. We advise you learn this simple function and lock portions of the Excel Spreadsheet before giving it to your conference contact. They should

Section 2: Participants

never be able to change the building code or the room number, so those columns should be locked. In some cases, you may not want your conference contact to change the check-in or check-out dates for each participant; you can lock those columns, too. If you do not “Protect” your spreadsheet, you are trusting your conference contact to change only the information you ask them to change (First Name, Last Name, Gender, and possibly Check-In and Check-Out dates). If your conference contact changes the building code or room numbers, you may not be able to use the file at all, or it may cause other problems if you do.

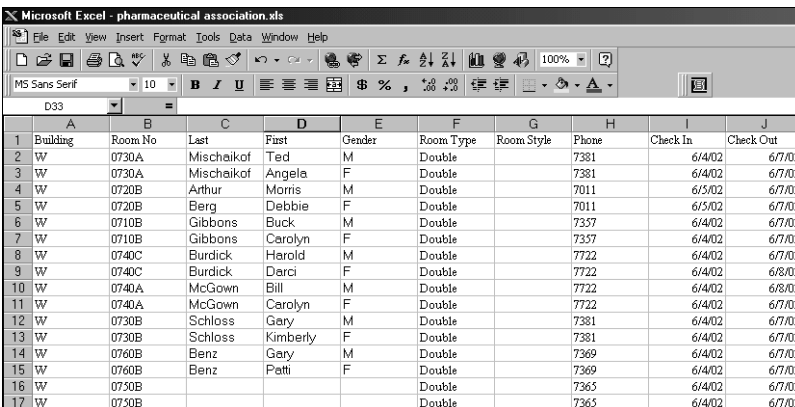
You can also use other feature of Microsoft Excel to help your customer. For example, you might highlight all the rooms that are around a female bathroom in pink and all the rooms that are around a male bathroom in blue.

Have your conference contact email or give the updated Excel file back to you when they are done with their data entry.

Importing From an Excel File

When you receive the Excel file from your conference contact, make a backup copy of it - if for some reason a catastrophe occurs while working on the file, you will always have the backup.

1. Open the Excel file in Microsoft Excel (Figure 2-21).



	A	B	C	D	E	F	G	H	I	J
	Building	Room No	Last	First	Gender	Room Type	Room Style	Phone	Check In	Check Out
1	W	0730A	Mischaikof	Ted	M	Double		7381	6/4/02	6/7/02
2	W	0730A	Mischaikof	Angela	F	Double		7381	6/4/02	6/7/02
3	W	0720B	Arthur	Morris	M	Double		7011	6/5/02	6/7/02
4	W	0720B	Berg	Debbie	F	Double		7011	6/5/02	6/7/02
5	W	0710B	Gibbons	Buck	M	Double		7357	6/4/02	6/7/02
6	W	0710B	Gibbons	Carolyn	F	Double		7357	6/4/02	6/7/02
7	W	0740C	Burdick	Harold	M	Double		7722	6/4/02	6/7/02
8	W	0740C	Burdick	Darci	F	Double		7722	6/4/02	6/8/02
9	W	0740A	McGown	Bill	M	Double		7722	6/4/02	6/8/02
10	W	0740A	McGown	Carolyn	F	Double		7722	6/4/02	6/7/02
11	W	0730B	Schloss	Gary	M	Double		7381	6/4/02	6/7/02
12	W	0730B	Schloss	Kimberly	F	Double		7381	6/4/02	6/7/02
13	W	0760B	Benz	Gary	M	Double		7369	6/4/02	6/7/02
14	W	0760B	Benz	Patti	F	Double		7369	6/4/02	6/7/02
15	W	0750B				Double		7365	6/4/02	6/7/02
16	W	0750B				Double		7365	6/4/02	6/7/02
17	W	0750B				Double		7365	6/4/02	6/7/02

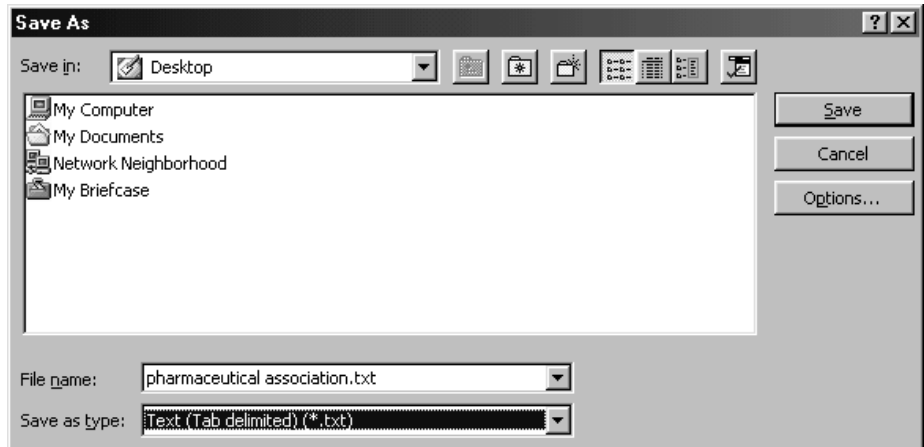
Figure 2-21

In this example, our conference contact followed our directions: No quotations were used in the participants' names, and gender was entered correctly. A few participants have modified check-in and out-dates: Morris Arthur and Debbie Berg are checking in a day late; Darci Burdick and Bill McGown are checking out a day late.

Section 2: Participants

You cannot import an Excel file directly into Conference Programmer. You must first convert the Excel file to a text file, which is very simple to do.

2. In Microsoft Excel, with the Excel file open, click the File menu and select Save As... The Save As window will open (Figure 2-22). This window will look different in different versions of Microsoft Windows. If your window looks different than Figure 2-22, it should look exactly like the windows you are familiar with when you save files in Microsoft Word or in your email program.



In the Save In field, select your Desktop, or anywhere it will be easy to find.

Figure 2-22

In the Save As Type field at the bottom of the window, select “Text (tab delimited) (*.txt)” (Figure 2-22). The file name will automatically change to a text version. In this example, the “Pharmaceutical Association.xls” file name automatically changed to “Pharmaceutical Association.txt.”

Click the Save button. Depending on which version of Microsoft Excel you use, you may receive an warning like the one shown in Figure 2-23 or Figure 2-24. The warning is telling you that a text file does not have some of the features as an Excel file - but that is exactly what we want, so click the Yes button.

3. Close Microsoft Excel by clicking the File menu and selecting Exit. At this point, Microsoft Excel thinks you have made a change to the file and is asking you if you want to save the changes (Figure 2-25). You do NOT want to save this file again! Click the No button.

Section 2: Participants

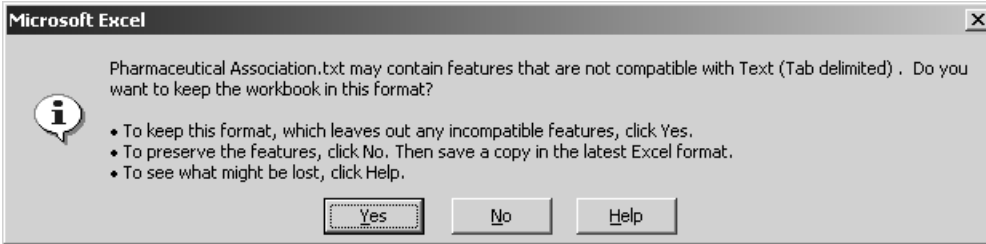


Figure 2-23

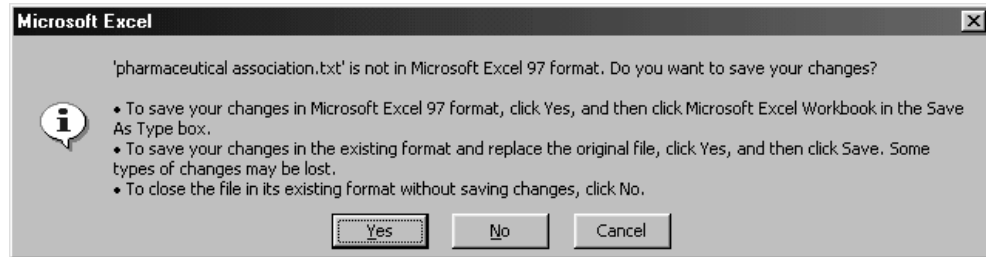


Figure 2-24

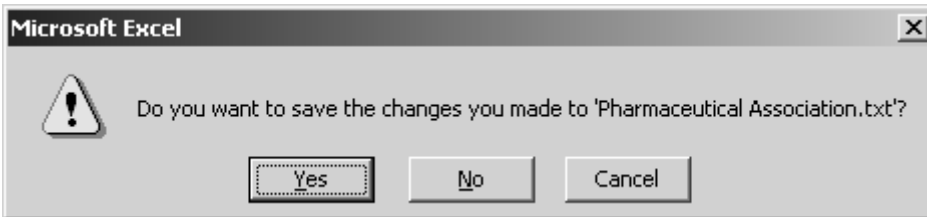


Figure 2-25

The text file should now be saved on your Desktop. Beware if you open it - it will look very confusing and you will assume you have done something wrong (Figure 2-26). You haven't! Tab-delimited text files were not meant to look clean, but were meant to import easily. This is the correct format for importing into Conference Programmer.

Building	Room No	Last	First	Gender	Room Type	Room Style	Phone	Check In
W	0730A	Mischaikof	Ted	M	Double	7381	6/4/02	6/7/02
W	0730B	Mischaikof	Angela	F	Double	7381	6/4/02	6/7/02
W	0720B	Arthur	Harris	M	Double	7811	6/5/02	6/7/02
W	0720B	Berg	Debbie	F	Double	7811	6/5/02	6/7/02
W	0710B	Gibbons	Buck	M	Double	7357	6/4/02	6/7/02
W	0710B	Gibbons	Carolyn	F	Double	7357	6/4/02	6/7/02
W	0740C	Burdick	Harold	M	Double	7722	6/4/02	6/7/02
W	0740C	Burdick	Darci	F	Double	7722	6/4/02	6/8/02
W	0740A	McCoun	Bill	M	Double	7722	6/4/02	6/8/02
W	0740A	McCoun	Carolyn	F	Double	7722	6/4/02	6/7/02
W	0730B	Schloss	Gary	M	Double	7381	6/4/02	6/7/02
W	0730B	Schloss	Kimberly	F	Double	7381	6/4/02	6/7/02
W	0760B	Benz	Gary	M	Double	7369	6/4/02	6/7/02
W	0760B	Benz	Patti	F	Double	7369	6/4/02	6/7/02

Figure 2-26

Section 2: Participants

4. In Conference Programmer, in the browse tree, expand Wizards and click Import Wizard. The Import Wizard window will appear (Figure 2-27).

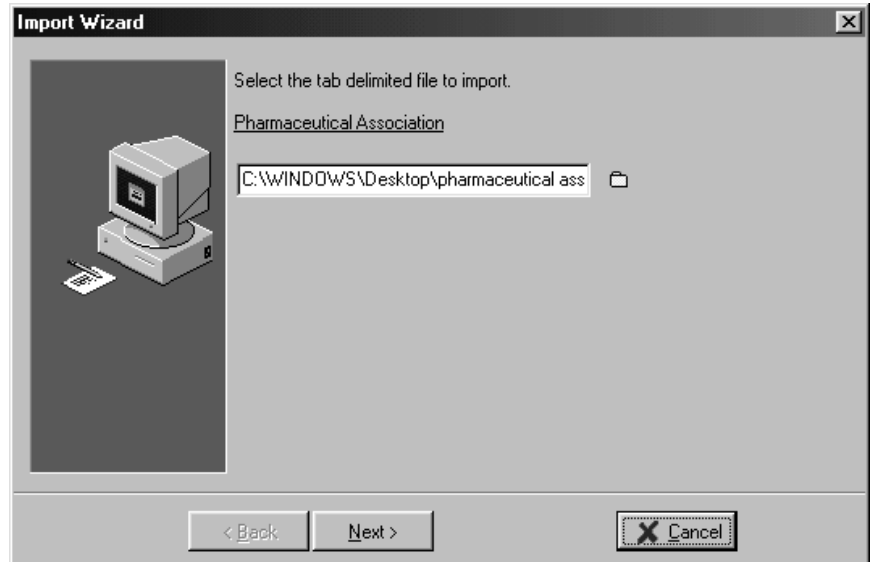


Figure 2-27

5. Make sure the conference name shown is the one you want to import the names into. Under the conference name there is a field and an icon of a yellow folder. The first time you use the Import wizard, the field will be blank - after you use it once, it will remember the last information you had in the field. This field should contain the location of the text file you want to import. In this example, it contains "C:\WINDOWS\Desktop\pharmaceutical association.txt." If this is not the file you want to import, or if you are not sure, you can easily find and select the correct file by clicking on the yellow folder button to the right of the field. The Open window will look different in different versions of Microsoft Windows. it should look exactly like the windows you are familiar with when you open files in Microsoft Word or other programs. Once you find your text file, which in this example is on our Desktop, click on it and click the Open button. The location of the file is automatically entered in the field. You can now click the Next button.
6. The list of participants to be imported is displayed (Figure 2-28). Click the Next button.

Section 2: Participants

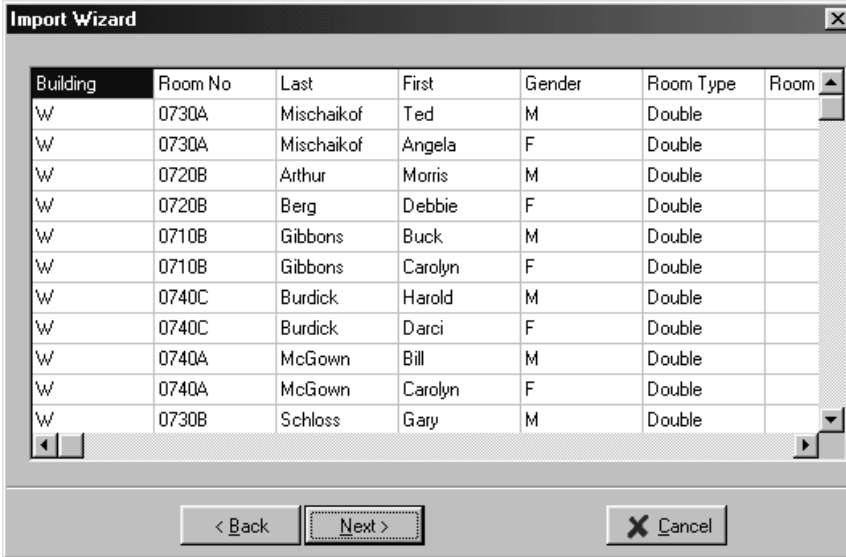


Figure 2-28

7. Review the import information.

The Import Wizard window displays “linking” information. The list of items under “Source” are the names of the columns from your Excel file. The list of items under “Destination” are field names in Conference Programmer. You need to tell the Import Wizard how to link the text file to the field names. The first time you run the Import Wizard, there are no links - after you use it once, the links are remembered and automatically entered, yet are changeable for different imports. If you never change the way you link the text file to the field names, you will never need to change the linking information. If you do change the way you link the text file to the field names (for example, if you do not allow one customer to change their check-in or check-out dates, but you do allow another customer to do this), the new linking information will be displayed the next time you run the Import Wizard.

To create a link, click on the name of a column name under “Source,” click on a field name under “Destination,” and click the Add Link button. To delete a link, click the link and click the Delete Link button.

The Check-In and Check-Out fields listed in the Default Information area are automatically filled in with the dates of the conference, although you can change these to early or late arrival or departure dates. If you are not importing the check-in and check-out columns from the text file (if you are not allowing the customer to change their participants’ check-in or check-out

Section 2: Participants

dates), all the participants will automatically be assigned these default check-in and check-out dates when they are imported. Remember, in this example some participants had different arrival and departure dates. To ensure that the correct information is imported, we recommend the linking as shown in Figure 2-29.

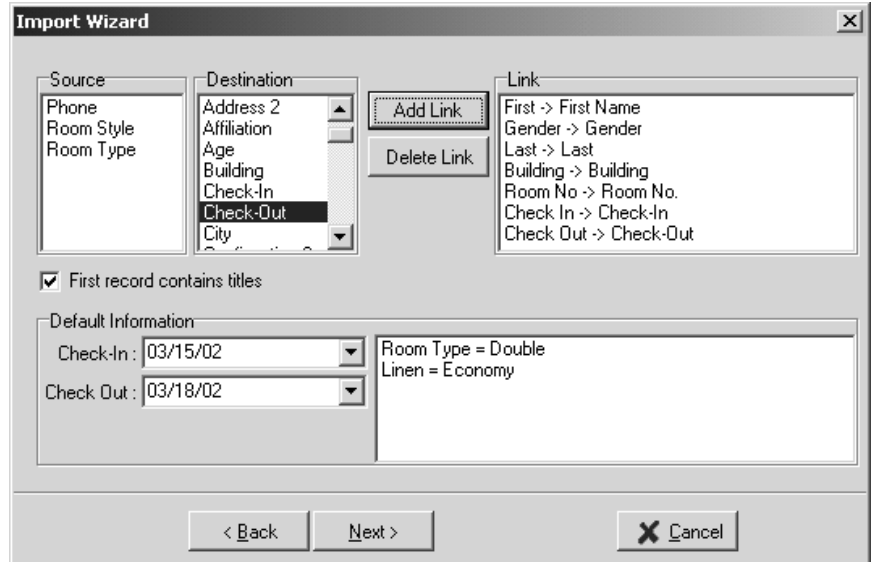


Figure 2-29

The “First record contains titles” checkbox should be checked for this procedure. It is possible to import participant names from any Excel file (once it has been converted to a tab-delimited text file), so if your conference contact gives you simply a list of names, without gender or room assignments, you can import them to save time. In that example, if your conference contact did not put a title in Excel for each column, you should uncheck this checkbox.

8. Review Service Template items. To the right of the Default Information area, all the Service Template items for this conference are listed (see Section 4: Service Template).

When you finish importing participants in this wizard, each of the values listed will automatically be entered for each participant. If you wish to apply different or additional defaults, cancel this wizard by clicking the Cancel button and then clicking the OK button when asked if you want to terminate the process, and make the appropriate changes in the Service Template for this conference.

Section 2: Participants

For example, if you just imported all participants who are in double rooms and you are now ready to import participants in single rooms, you should cancel the wizard, change the Service Template item for Room Type to “Single,” then run the Import wizard again for the batch of participants in Single rooms.

9. Click the Next button. The import screen appears and you can watch the very rapid import process (Figure 2-30).

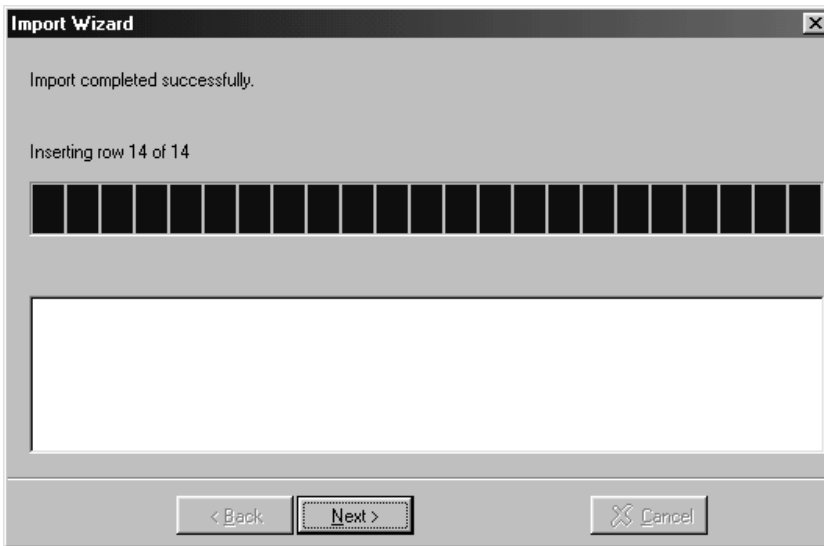


Figure 2-30

After Conference Programmer runs the import process, a window will indicate whether any errors occurred. Improper linking and other errors, if any, will be listed in the bottom of the import screen. If you received an error, it is listed as a row number - this number is the row in the Excel file where the error exists (remember that if your Excel file has column names, the row number may be off by one).

10. Click the Next button to finish the wizard.

You can see the participants you just imported by expanding Participants/Subgroups in the browse tree, or by clicking the Locate button on the toolbar and selecting Select Participant.

This may seem like a lot of steps and is possibly confusing. However, once you have run the import process a few times, it will seem quite simple. And, of course, you will see it can save you an enormous amount of time, especially for large conferences.

2.4 Deleting Participants

In order to delete a participant, you must first delete any financial transactions that have been entered for that participant (this might mean a charge to a subgroup or conference for that participant). You also must uncheck all events for that participant.

Make sure you are working with the participant you want to delete (see Section 2.1: Selecting Participants).

1. Click the Participants General tab.
2. Click the Delete button on the toolbar. Click the OK button when asked to confirm that you want to delete the participant.

If you get an error, it means that the participant you are trying to delete still has a charge, payment, or event related to them, and you cannot delete a participant with any charges, payments, or events.

3. You can delete multiple participants at once using the Delete Conference wizard (see Section 3.3: Delete Conference Wizard).

2.5 Moving Participants

Once a participant has been created, it is possible to move it, and all of its charges, payments, and events, to another conference. This is useful if you have accidentally created the participant in the wrong conference, or are restructuring conferences for better management.

Figure 2-31 shows a participant named “Karen Anderson” in our Adventures in Science conference; we do not want this participant in this conference.

Make sure you are working with the conference that contains the participant you want to move.

1. In the browse tree, click the name of the participant you want to move to another conference (Figure 2-31).
2. Click the Procedures button on the toolbar and select Move Participant. The Select Conference window will open (Figure 2-32).
3. Select the conference you want to move the participant to and click the OK button.

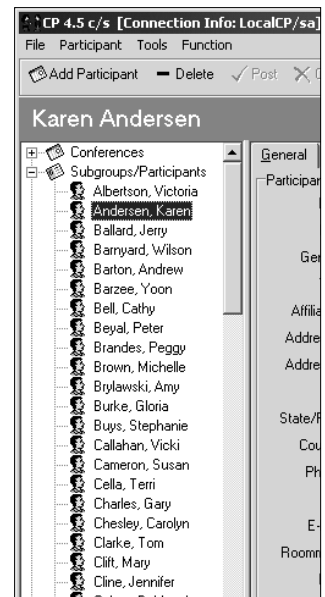


Figure 2-31

Section 2: Participants

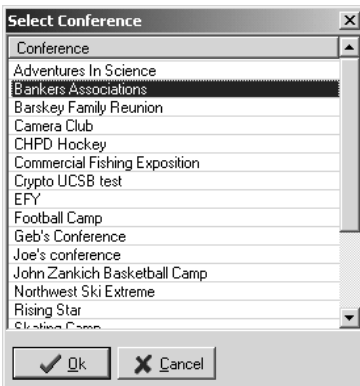


Figure 2-32

4. Click the OK button in the confirmation window that opens (Figure 2-33).



Figure 2-33

Figure 2-34 shows the Bankers Associations conference after we have moved the participant “Karen Anderson” to it.



Figure 2-34

2.6 Copying Participants

It might be convenient to copy a participant, instead of entering a new one. In our Barskey Family Reunion example, many participants have the same address.

Make sure you are viewing the General tab of the participant you want to copy (Figure 2-35).

1. Click the Procedures button on the toolbar and select Copy Participant. A new participant is created and all the information from the General and Additional Info tabs is automatically entered for you. The last name is the same as the last name of Participant you copied, except that a number is appended to it (Figure 2-36). You can leave this, or change the name of the participant.

Section 2: Participants

CP 4.5 c/s [Connection Info: LocalCP/sa]

File Participant Tools Function

Add Participant Delete Post Cancel Previous Next Procedures Qu

Mike Barskey

- Conferences
- Subgroups/Participants
 - Barskey, Mike
 - Meals
 - Contracts
 - Meeting Facilities
 - Catering
 - Computation of Costs
 - Barskey, Mike
 - Bunny, Bugs
 - Johnson, Willamena
 - Smith, Sam
- Room Assignments
- Reports
- Wizards
- Setup

General | Additional Info | Charges and Payments | Events

Participant #14072

Last : Barskey

First : Mike

Gender : M Age :

Title :

Affiliation :

Address 1 : 123 Street

Address 2 : Apt. #3D

City : Cityville

State/Prov : CA P. Code : 92201

Country : USA

Phone : 760-342-2078

Fax : 800-442-6891

E-Mail : mbarskey@seattletech.com

Roommate :

Last :

Figure 2-35

If you are copying a participant whose last name ends with a hyphen and a number separated by a space ("Barskey- 1" in this example), the last name of the new participant will be the same name with the next higher number ("Barskey- 2" in this example).

General | Additional Info | Charges and Payments | Events

Contact Information

Last : Barskey- 1

First : Mike

Gender : M Age :

Title :

Affiliation :

Figure 2-36

2. Click the Post button to save your changes to the new participant.

Section 3: Conferences

3 Conferences

3.1 Adding a Conference

1. In the browse tree, click Conferences and click the General tab. The Conference General screen is displayed (Figure 3-1).

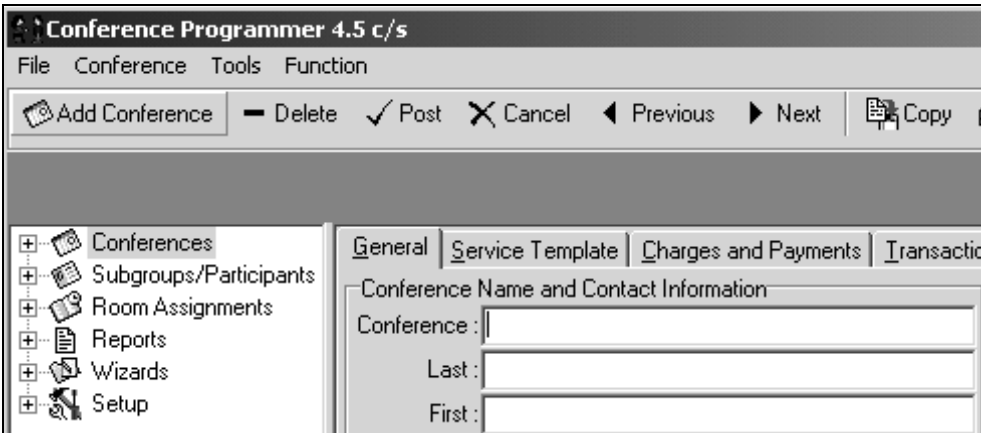


Figure 3-1

2. Click the Add Conference button on the toolbar (Figure 3-1). A blank General tab is displayed.
3. Enter the information for the conference. The only required fields are the conference name and the check-in and check-out dates. When information is complete, click the Post button in the toolbar.

In the Conference field, type the name of the new conference.

Use the Last, First, and Address fields to enter information about the contact person for the conference - this information shows up on the group bill invoice.

In the Check-In and Check-Out fields, you can type the dates or click the arrows to select the dates from a calendar (Figure 3-2). When you type the dates, Conference Programmer automatically adds the slashes between the month, day, and year.

When you enter the check-in and check-out dates, the number of nights the group is staying is automatically calculated and displayed.

Section 3: Conferences

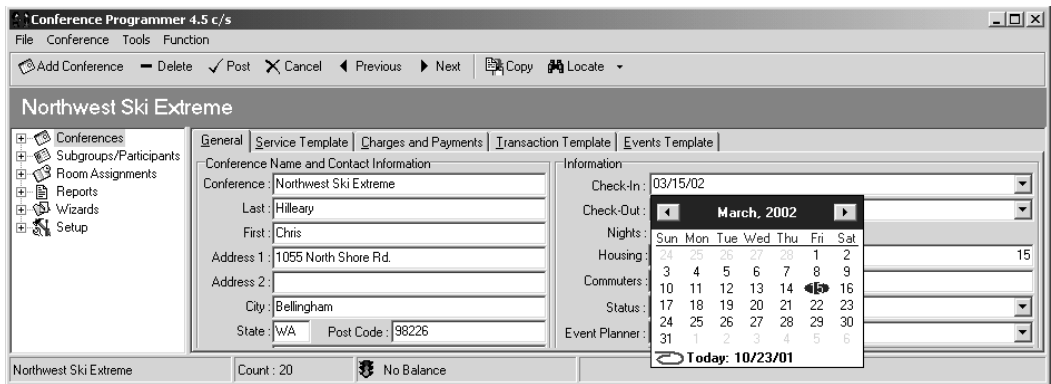


Figure 3-2

Enter into the Housing field the estimated number of participants for this conference who will be staying on campus.

Enter into the Commuters field the estimated number of participants attending the conference who do not need housing - one of the reasons for entering the number of commuters is that the Meal Planning Wizard takes advantage of this information.

3.2 Selecting a Conference

There are 3 ways to move from one conference to another. The most common method is "Select Conference." You can also step through all existing conferences in alphabetical or reverse-alphabetical order. The last method is "Global Select Participant," something you've already encountered in Section 2.1: Selecting Participants.

Select Conference

1. In the browse tree, click Conferences.
2. Click the Locate button on the toolbar and Select Conference. The Select Conference window will open (Figure 3-3).

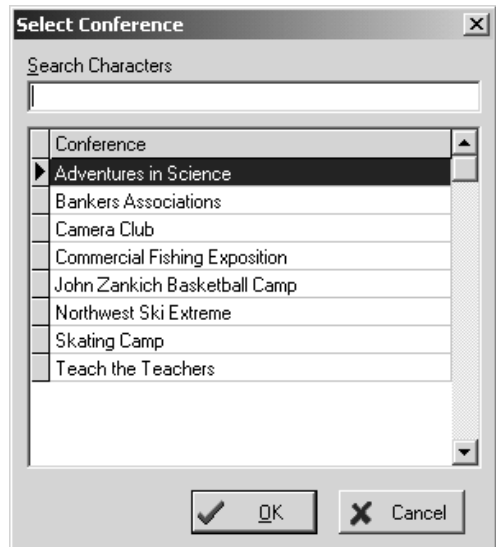


Figure 3-3

Section 3: Conferences

3. To find a particular conference, type the first few letters of the conference name - the list automatically scrolls to the conference whose name begins with the letters you typed.
4. When you find the conference you want, click the conference name and then click the OK button.

Step Through the List of Conferences

1. In the browse tree, click Conferences. The Conferences General tab will open in the main portion of the window (Figure 3-4).

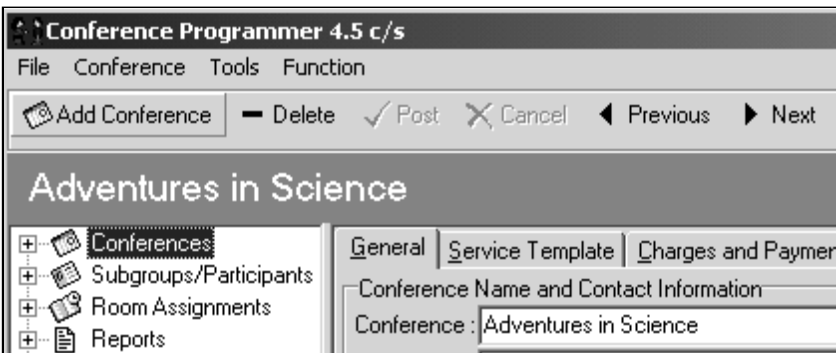


Figure 3-4

2. Move to the next alphabetical conference (A-Z) by clicking the Next button on the toolbar. Or you can hold the Control key on the keyboard down and then press the “N” key (ctrl-N) to move to the next record alphabetically.
3. Move to the previous alphabetical conference (Z-A) by clicking the Previous button on the toolbar. Or you can hold the Control key on the keyboard down and then press the “K” key (ctrl-K) to move to the previous record alphabetically.

Global Select Participant

When you select a participant with Global Select Participant (see Section 2.1: Selecting Participants), the conference they are attending is also opened (and the conference you were previously working with is closed). After using Global Select Participant, always check what conference is open by glancing at the status bar on the bottom of the Conference Programmer window.

3.3 Delete Conference Wizard

1. In the browse tree, expand Wizards and click Delete Conference. The Delete Conference window will open (Figure 3-5).

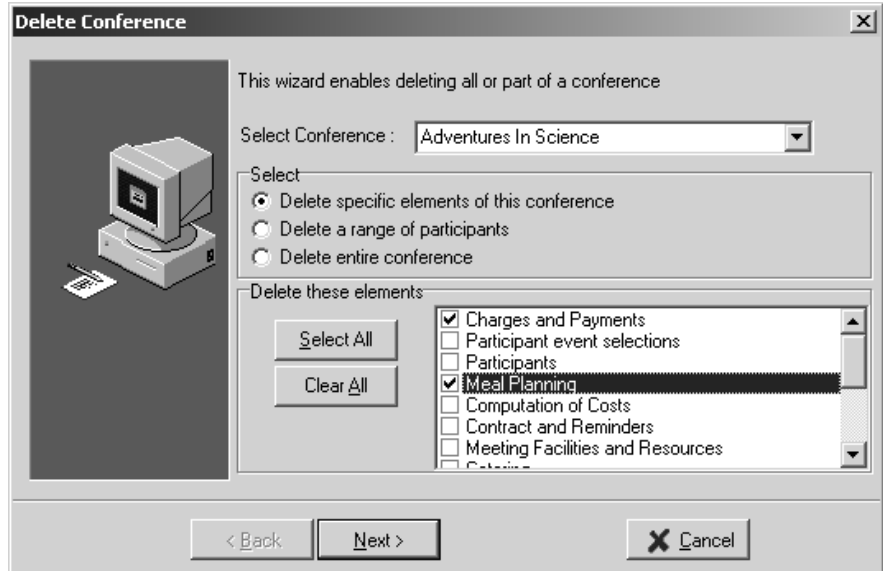


Figure 3-5

2. In the Select Conference field, select the conference you want to delete.
3. If you want to only delete parts of the conference, such as all the meals you have created so far in the Meals wizard or all the charges and payments entered so far for this conference, select "Delete specific elements of this conference." If you want to delete some of the participants from this conference, select "Delete a range of participants." If you want to delete the entire conference, select "Delete entire conference." In this example, we chose to delete parts of this conference.
4. Check the checkboxes next to the parts of the conference you want to delete. You can check all or none of the checkboxes by clicking the Select All or Clear All buttons, respectively. In this example, we checked the boxes to delete the charges and payments and the meals for this conference.

Section 3: Conferences

5. Click the Next button. The wizard will calculate and display what it is about to delete (Figure 3-6).

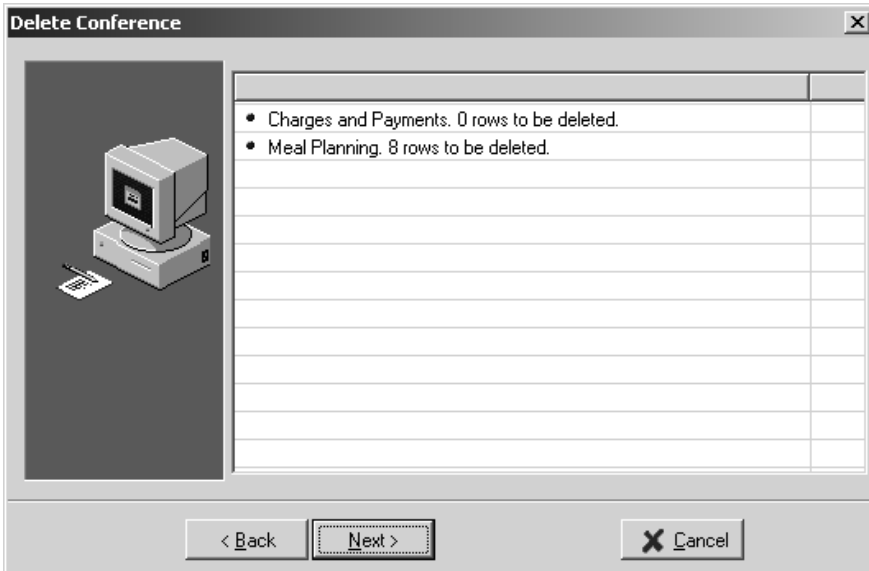


Figure 3-6

6. Click the Next button. The wizard will delete what you selected, placing a check-mark next to each item as it is deleted (Figure 3-7). If the wizard successfully deletes all items, the window will close.

Delete a Conference From the Conferences General Tab

1. Click the Delete button on the toolbar. The Delete Conference wizard will open, but will open differently that if you ran it from the Wizards branch of the browse tree (Figure 3-8). Notice that the Select Conference field is already filled in with the conference you were working with, and is not changeable.
2. In this example, we selected "Delete entire conference." Notice that every item below automatically becomes checked. You cannot uncheck the items unless you change your selection to "Delete specific elements of this conference."
3. Click the Next button. The wizard will calculate and display what it is about to delete.

Section 3: Conferences

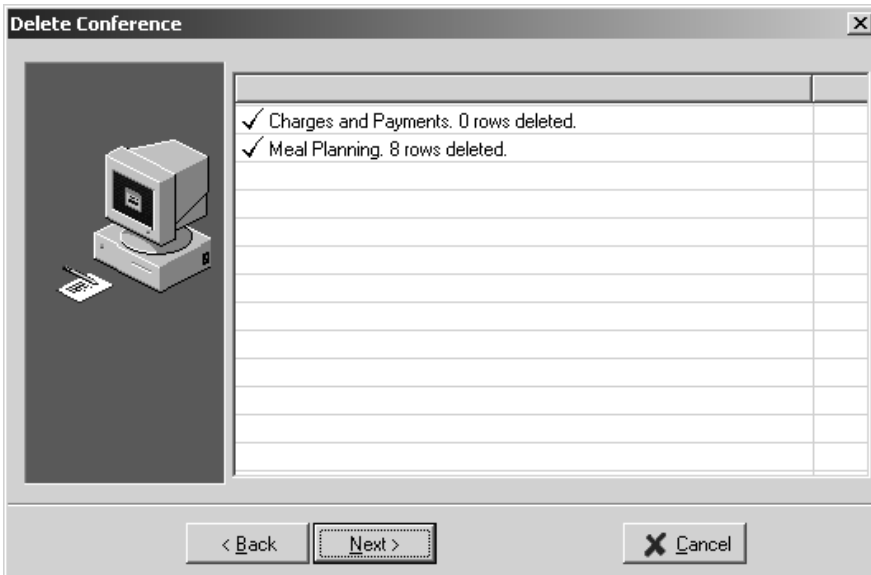


Figure 3-7



Figure 3-8

4. Click the Next button. The wizard will delete what you selected, placing a check-mark next to each item as it is deleted. If the wizard successfully deletes all items, the window will close.

Section 3: Conferences

Delete Some of the Participants From a Conference Using the Delete Conference Wizard

1. When viewing the Conferences General tab, click the Delete button on the toolbar. The Delete Conference wizard will open. Select “Delete a range of participants” (Figure 3-9). Notice that three items become checked in the “Delete these elements” section of the window: Charges and Payments, Participant event selections, and Participants. You cannot uncheck these items unless you change your original selection to “Delete specific elements of this conference.” These three items are checked because, when you delete a participant, Conference Programmer also needs to delete any events and charges or payments that are related to the participant.

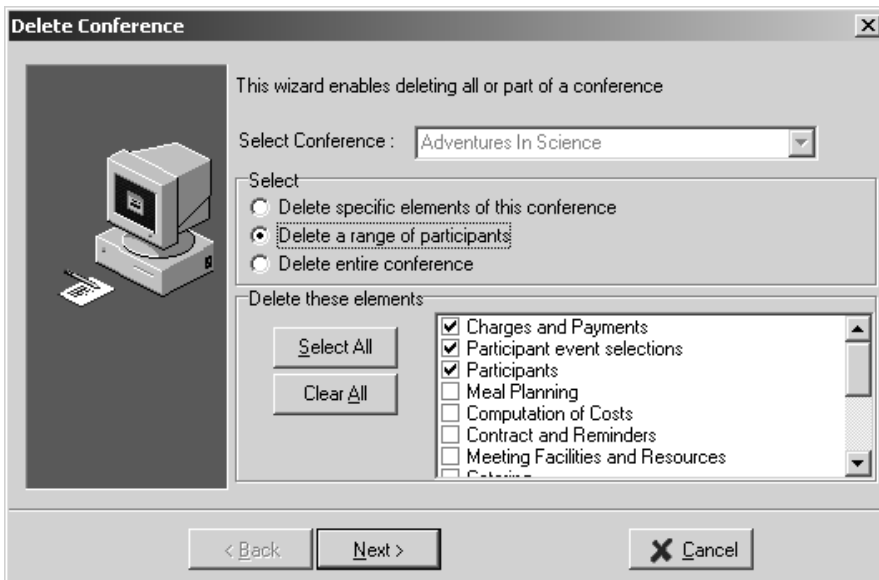


Figure 3-9

2. Click the Next button. The wizard lists all participants in the conference, sorted in the order they were entered into Conference Programmer (Figure 3-10). Select “Sort Alphabetically” to list the participants alphabetically by their last name.
3. Check the checkbox next to the name of each participant you want to delete. You can check all or none of the boxes by clicking the Select All or Clear All buttons, respectively.

Section 3: Conferences

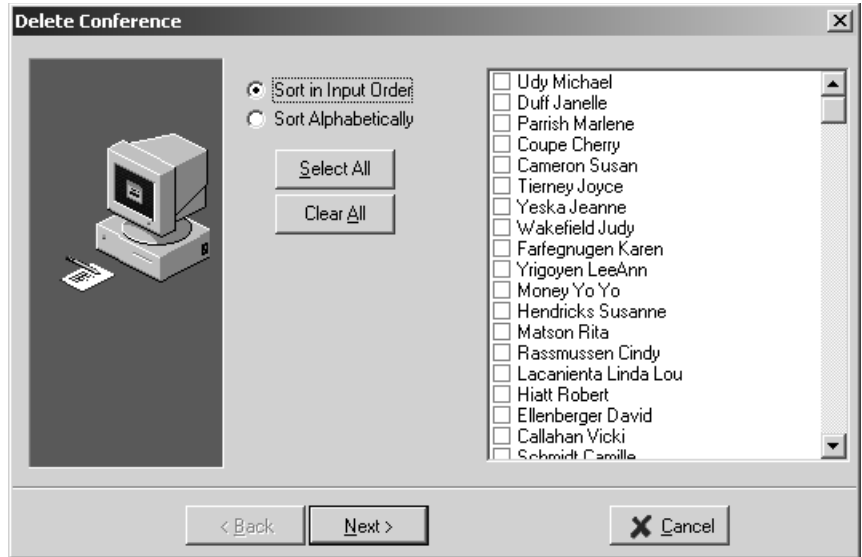


Figure 3-10

4. Click the Next button to delete all participants with a check mark next to their name. The wizard will calculate and display what it is about to delete.
5. Click the Next button. The wizard will delete what you selected, placing a check-mark next to each item as it is deleted. If the wizard successfully deletes all items, the window will close.

3.4 Conference Related Functionality

When you expand Conferences in the browse tree (Figure 3-11), you see some wizards that are based on that conference. If you clicked on Meals, for example, you would be able to enter the meals for this conference. Meals is discussed in Section 13: Meals Wizard. Contracts is discussed in Section 12: Contracts. Meeting Facilities is discussed in Section 15: Meeting Facilities Wizard. Catering is discussed in Section 14: Catering Wizard. Computation of Costs is discussed in Section 17.12: Computation of Costs Wizard.



Figure 3-11

Section 4: Service Template

4 Service Template

4.1 Setting Up a Service Template For Group Billed Conferences

The purpose of the service template is to save you time. The Service Template will automatically enter information for each participant you add to a conference. For example, if you have a conference with 400 participants and you will need to enter a status of “Registered,” a linen plan of “Economy,” and a room type of “Double” for each participant, the Service Template will save you the time of entering those 3 values to each of the 400 participants - it will be done for you automatically.

You can copy the Service Template from one conference to another conference (see Section 17.3: Copying Elements Between Conferences).

Before You Begin

Prior to setting up the Service Template, determine if there are any services for this conference that every participant - or most participants - will be assigned. Room type, linen package, and meal plans are often included in the service template.

For example, will most, or all, participants be assigned a double room? Will most, or all, participants have a particular linen pack? The Service Template is useful even if not all participants will have the same value for a field. Consider an example sports camp: Most participants are youths and are assigned a double room, but a few coaches will be assigned a single room. By adding Room Type=Double to the Service Template, every participant entered will have this assigned room type, then you can manually change the few coaches' room types to Single. This eliminates the need to scroll through all of the participants entering the appropriate room type.

You may have a conference where the values for a field are split pretty evenly. For example, 200 participants may want Meal Plan A and 200 may want Meal Plan B. In this case, you can add Meal Plan A to the Service Template and then enter the first 200 participants, then change the Service Template to Meal Plan B and then enter the last 200 participants.

Section 4: Service Template

Service Template

Before you begin, open the conference you want to work with by clicking the Locate button on the toolbar and selecting Select Conference, then click on the appropriate conference and click the OK button.

1. In the browse tree, click Conferences and click the Service Template tab (Figure 4-1).

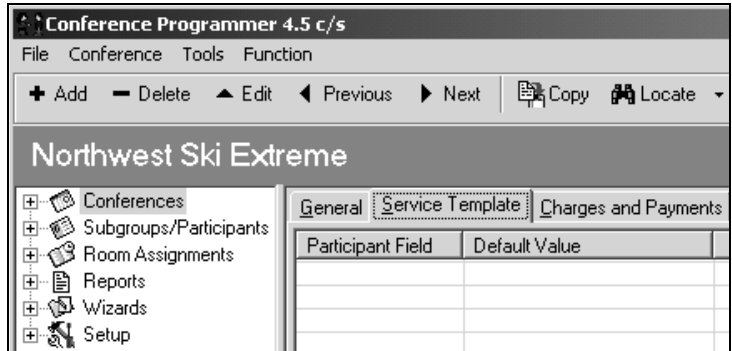


Figure 4-1

2. Click the Add button on the toolbar (Figure 4-1), or right click anywhere in the window and select Add. The Service Template Value window will open (Figure 4-2).
3. From the Participant Field drop-down menu, select the field you want to have information automatically entered into. In this example we have chosen Room Type (Figure 4-3).

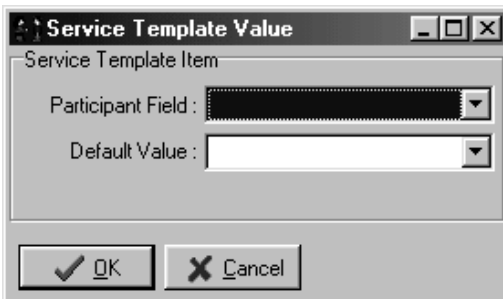


Figure 4-2

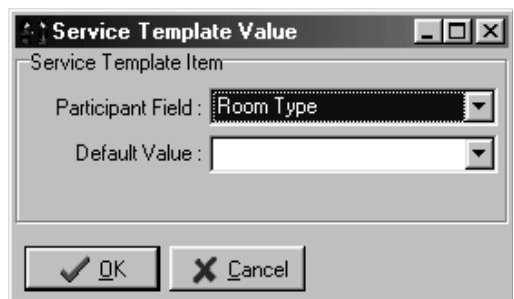


Figure 4-3

Section 4: Service Template

4. From the Default Value drop-down menu, select the value you want automatically entered in the field. In this example, the options listed are the available room types, and we have chosen Double (Figure 4-4).
5. Click the OK button. You will return to the Service Template tab (Figure 4-5) and the items set up for the conference will be displayed (Figure 4-5).

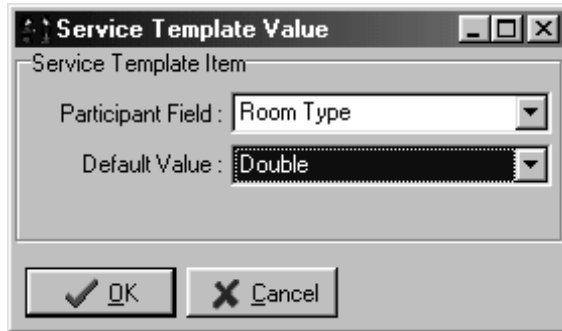


Figure 4-4

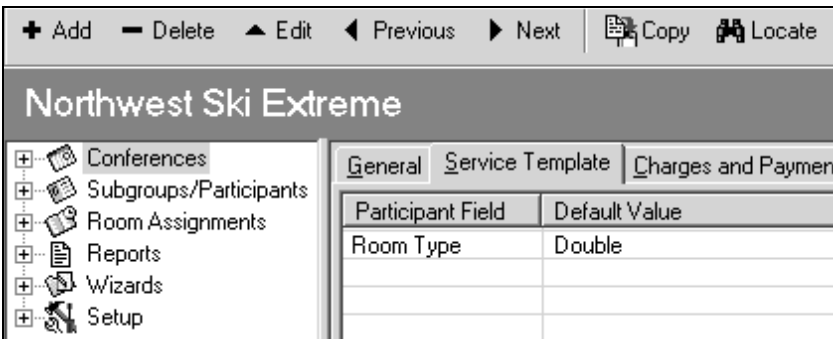


Figure 4-5

Example - Linen Package

You may set up as many items as needed in the Service Template. Another common transaction template item we recommend is Linen. Often linen charges are included in the room price, but listing the linen plan is recommended - housekeeping staff will appreciate having this information available. Suppose our example sports camp has opted for an Economy linen plan for its participants, but the coaches have requested a Premium linen plan. In the Service Template you would select Linen in the Participant Field and set the Default Value field to Economy (Figure 4-6). Once all participants have been entered, you can locate each coach and change their linen plan to Premium.

Section 4: Service Template

When you click the OK button, you will return to the Service Template tab and all Service Template items will be listed (Figure 4-7).

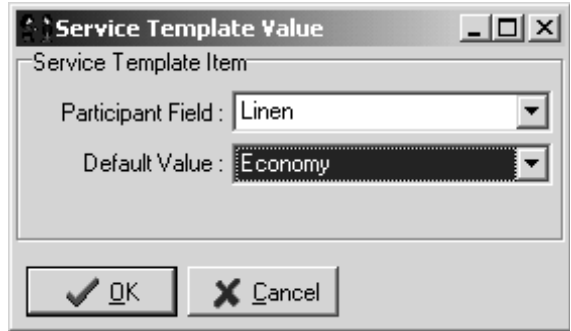


Figure 4-6

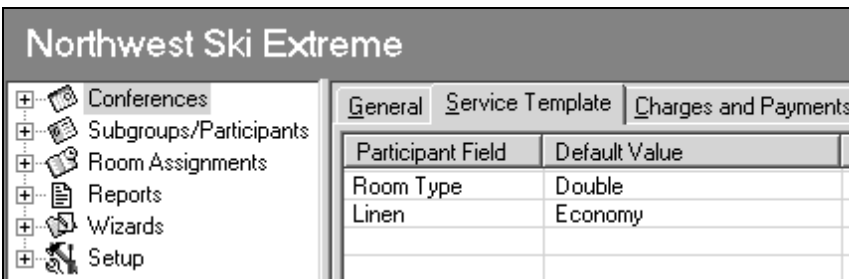


Figure 4-7

4.2 Setting Up a Service Template For Individual Billed Conferences

The Service Template for individual billed conferences is almost identical to the Service Template for group billed conferences. Often the only exception is how meal plans are handled: Adding a meal plan to the service template may not be useful for individually billed conferences when a wide selection of meal plans is offered.

You may want to enter a meal plan in the Service Template for conferences that do not offer very many choices for meal plans. One popular method is to define a meal package. Let's call our meal package, "Plan A." Plan A is an option under Meal Plan. (Figure 4-8).

If we enter Meal Plan A in the Service Template, all participants in this conference will have Plan A entered by default. You may have a conference where there is no particular meal plan used by the majority of the participants. Perhaps your conference may have 4 or 5 different meal options. If this were the case, entering a meal plan in the service template is not advised. You would have to edit so many records, it would be more efficient to scroll through each participant and enter meal plans individually.

Section 4: Service Template

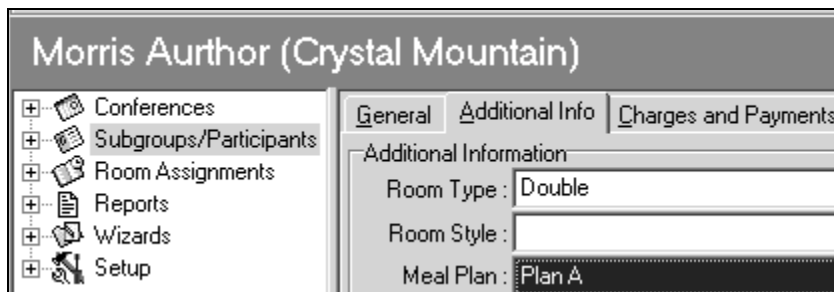


Figure 4-8

4.3 Custom Fields and Custom Values

When creating Service Template items, you can select a value from certain options to be entered for each participant. You must define these options before you can create a Transaction Template item

Without customizing Conference Programmer at all, there are a number of fields and values available that should handle most basic conference situations (room type, meal plan, linen, etc.). However, there are also fields you can customize, which are frequently used for more specific conference situations. One example is High School: This field does not exist, but suppose we want to assign rooms such that participants in each high school are near each other. We can name a field "High School" and create custom values for that field such as "Monte Vista High School" and "San Ramon High School." Another example is Parking: This field does not exist, but we may want to charge differently depending on which parking plan a participant receives. We can name a field "Parking" and create custom values for that field such as "1 day," "2 days," and "3 days."

You can change the names of fields (see Section: 17.1: Changing a Field Label) and change the contents of the drop-down lists of fields (see Section 17.2: Changing a Drop-Down List). After these fields and values have been set up, we can enter them into the Service Template.

Section 5: Transaction Template

5 Transaction Template

This function of Conference Programmer wins the award for causing the most confusion for new users. However, once you understand the Transaction Template, your billing process will become much easier.

The Transaction Template is a complete rate schedule - a list of every possible charge that can be automatically calculated, such as room rates, meal plan rates, and linen rates, no-show charges, weekly or monthly rates, extra fees, etc. Not every charge will always be applied, but it must exist so that it can be applied when appropriate.

5.1 Setting Up a Transaction Template

1. In the browse tree, click Conference. Click the Locate button on the toolbar and choose Select Conference. Click on the conference you want to work with and click the OK button.
2. Click the Transaction Template tab (Figure 5-1).

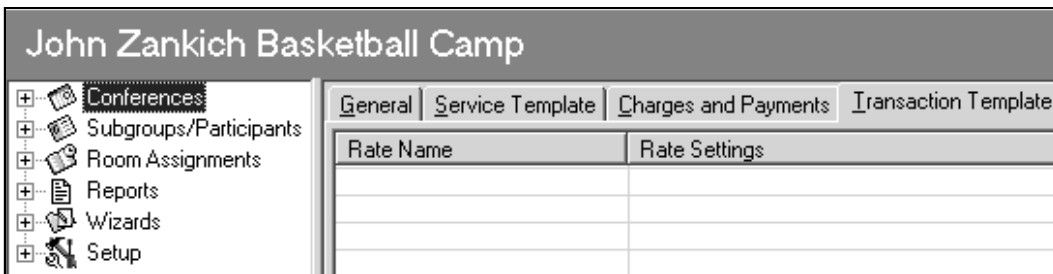


Figure 5-1

3. Click the Add button on the toolbar, or right click anywhere in the window and select Add. The Edit Transaction Template window will open (Figure 5-2).
4. Set up the rate. In this example, we plan to place all participants in either single or double rooms. The Transaction Template for this group will have two rates; one for singles and one for doubles. We will begin with the Double Room Rate.

In the Rate Name field, enter the name for the rate. This is what your customer will see on their bill. In this example, we entered "Double Room Rate."

In the Account field, select the account you want to use to track the money for this charge. In this example we chose Housing.

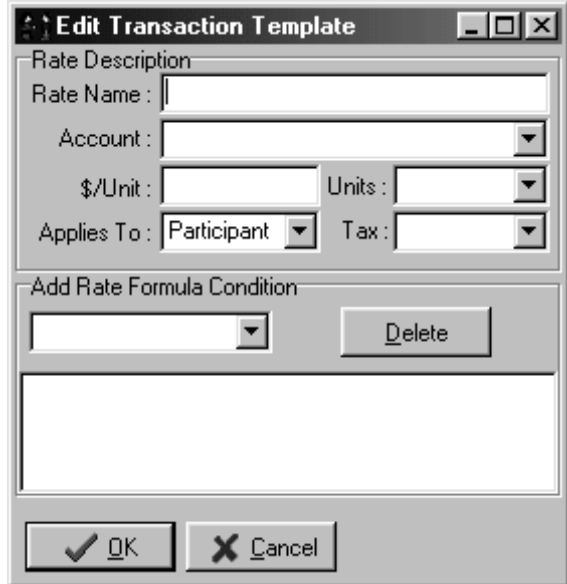
Section 5: Transaction Template

In the \$/Unit and Units fields, enter the rate. In this example, we want to charge \$19.50 per night, so we enter 19.50 in the \$/Unit field, and select Nights in the Units field. Nights are defined as a participant's check-out date minus their check-in date.

In the Tax field, select the correct tax rate. If you do not charge tax you must have a "No Tax" tax rate configured (see Section 17.8: Tax Rules).

In the Applies To field, you must select whether this charge will be applied to a Participant, a Conference, or a Subgroup. This example is a group billed conference, so we apply the charge to the Conference (Figure 5-3) (see Section 5.2: Applying Charges To the Participant, Section 5.3: Applying Charges To Both Conference and Participants, and Section 5.4: Applying Charges To a Subgroup).

The Applies To field is a powerful feature in Conference Programmer. Consider the situation where you have a conference and you plan to bill your main contact. We refer to this as a "group billed" conference. By applying charges to the conference, all charges incurred will be applied to one invoice for the entire group, even if the charges are for individual participants. In this example, the charge is per individual - whether they are staying in a double or single room and for how many nights - but we are applying the charge to the conference.



Edit Transaction Template

Rate Description

Rate Name : |

Account : |

\$/Unit : | Units : |

Applies To : Participant Tax : |

Add Rate Formula Condition

| Delete

OK Cancel

Figure 5-2



Edit Transaction Template

Rate Description

Rate Name : Double Room Rate

Account : Housing

\$/Unit : \$19.50 Units : Nights

Applies To : Conference Tax : No Tax

Add Rate Formula Condition

| Delete

OK Cancel

Figure 5-3

Section 5: Transaction Template

5. Set up conditions for the rate. The conditions determine when this rate will apply. If a rate has a condition that says “apply this rate if a participant is to be charged for a double room,” then the rate will only apply to those participants who are to be charged for a double room - the rate will be ignored by all participants to be charged for a single room.

In the Add Rate Formula Condition field, select the field you want as a condition of this rate. In this example, we chose Room Type. A condition window will open (Figure 5-4).

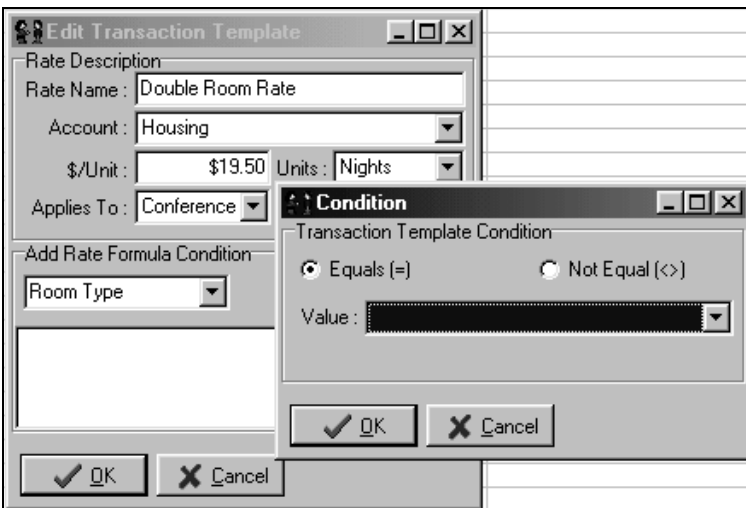


Figure 5-4

Notice that Equals (=) is selected. In the Value field, select the value for which you want this charge to apply and click the OK button. In this example, the options listed are the available room types, and we have chosen Double. Click the OK button and “Room Type = Double” shows as a condition of this rate. (Figure 5-5).

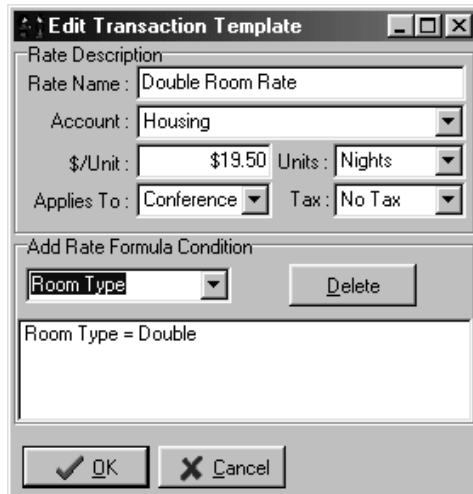


Figure 5-5

Section 5: Transaction Template

We have just told Conference Programmer that for every participant whose room type is Double, charge the conference a rate of \$19.50 per night.

- Set up additional conditions. In addition to stating that the rate is to be charged to participants whose Room Type is Double, you can set up additional conditions for the rate. In this example, we do not want to apply the Double Room Rate to participants who did not show up for the conference, even if they have a Room Type of Double. We also do not want to apply this charge to participants that changed their status to a Commuter (a participant without lodging), or to participants who may have Canceled altogether. This can be done using the Not Equals condition.

Select Status in the Add Rate Formula Condition field. Select Not Equal (<>) and select “No Show” in the Value field (Figure 5-6).

When the OK button is clicked, “Status <> No Show” is displayed as one of the conditions in this rate formula (Figure 5-7).

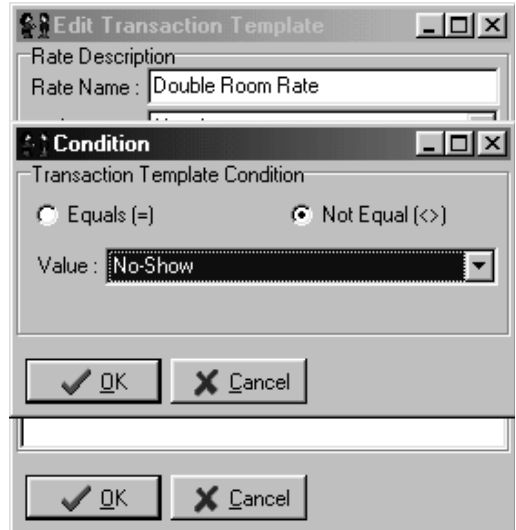


Figure 5-6



Figure 5-7

To add “Status <> Canceled” as a condition, Select Status from the Add Rate Formula Condition field again. Select Not Equal (<>) and select “Canceled” in the Value field. Click the OK button.

Now there are three conditions of this rate (Figure 5-8).

Section 5: Transaction Template

Figure 5-8

Follow the same steps to add the last condition we need, “Status <> Commuter.” Figure 5–9 shows a transaction template rate that will charge the conference for participants whose Room Type = Double, and whose Status is not equal to No Show, Canceled, or Commuter.

7. When all conditions have been entered, click the OK button. The rate formula is entered into the Transaction Template (Figure 5–10).

Figure 5-9

<input type="radio"/> General <input type="radio"/> Service Template <input type="radio"/> Charges and Payments <input type="radio"/> Transaction Template <input type="radio"/> Events Template		
Rate Name	Rate Settings	Rate Formula
Double Room Rate	\$19.50 / Night. No Tax. Housing.	Room Type = Double...

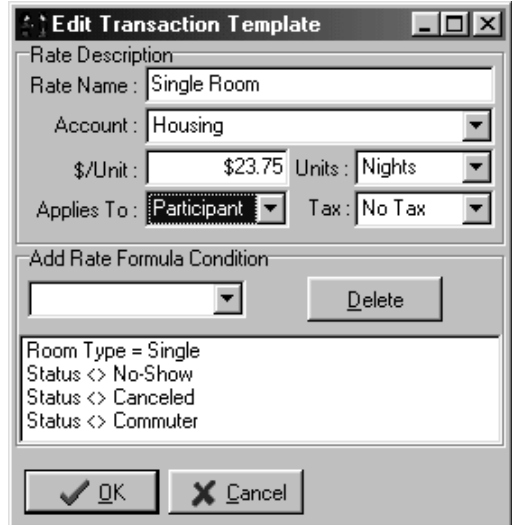
Figure 5-10

Section 5: Transaction Template

5.2 Applying Charges To the Participant

If you plan to apply all charges to the participant - an “individual billed” conference - the process is very similar to that for group billed conferences. The only difference is the entry in the Applies To field. To apply all charges to the participant, you would select Participant in the Applies To field (Figure 5-11).

In this new example, each participant matching these criteria will be charged \$23.75 per night. This charge will be automatically posted to their record by clicking the Auto Charge button or by running the Auto Charge wizard (see Section 10.2: Individual Billing).



The screenshot shows a dialog box titled "Edit Transaction Template". It contains several fields and buttons. Under "Rate Description", the "Rate Name" is "Single Room", "Account" is "Housing", "\$/Unit" is "\$23.75", "Units" is "Nights", "Applies To" is "Participant", and "Tax" is "No Tax". There is an "Add Rate Formula Condition" section with a dropdown menu and a "Delete" button. Below that, a list of conditions is shown: "Room Type = Single", "Status <> No-Show", "Status <> Canceled", and "Status <> Commuter". At the bottom are "OK" and "Cancel" buttons.

Figure 5-11

5.3 Applying Charges To Both Conference and Participants

A very common condition in the conferencing business is a combination of conference and individual charges. For example, a group may be responsible for all charges within the conference dates, while the individual participants are responsible for all charges generated by the participant coming early or staying late.

Creating a Transaction Template for this condition is quite simple: Determine which charges will be charged to the conference and which will be charged to the individual, then set up a rate for each type of charge.

In this example, let's assume that all participants will be in double rooms. We simply set up two room rates - first we build a rate charged to the conference for the conference nights, then a rate charged to the participant for nights outside the range of the conference dates.

For the conference rate, the Applies To field is set to “Conference” and the Units field is set to “Conf Nights” (Figure 5-12). When we run the Group Bill wizard (see Section 10.1: Group Billing), lodging charges will only be charged to the conference for all participants' nights within the range of the conference dates.

Section 5: Transaction Template

Figure 5-12

Figure 5-13

Next we build a rate that is charged to the participant. This rate covers any lodging charges outside the range of the conference dates. For this rate, the Applies To field is set to “Participant” and the Units field is set to “Part Nights” (Figure 5-13).

Figure 5-14 shows the completed Transaction Template.

This may look odd, since there are two identical Rate Names. Remember that each rate applies to different situations. When set up correctly, there can be more than one rate with the same Rate Name that never apply simultaneously, as in our example: Even though both transaction template rates are called “Double Room Rate,” one applies a charge to the conference for Participants’ nights within the range of the conference dates, the other applies a charge to each participant for their nights outside the range of the conference dates. Here, in the Transaction Template - the rate “control center” - you can see all the rates because you may need to change them. But the customer will only see what is appropriate for their invoice.

You may want to enter the Rates Names as “Double Room - Conference’ and “Double Room - Participant” to avoid confusion when looking at the Transaction Template. However, they would appear on the invoices

General	Service Template	Charges and Payments	Transaction Template	Events Template
Rate Name		Rate Settings		Rate Formula
Double Room Rate		\$25.00 / Conf Night. No Tax. Housing.		Room Type = Double...
Double Room Rate		\$25.00 / Part Night. No Tax. Housing.		Room Type = Double...

Figure 5-14

Section 5: Transaction Template

that way, and it may cause confusion for your customer. When you have more than one rate with the same Rate Name, you can view which rate applies to what by double-clicking the Rate Name - the window for that rate will open.

Now the Transaction Template for our example conference is set up. If any participant checks in before the conference start date or checks out after the the conference end date, lodging charges for the extra nights will be applied directly to their record. All nights that all participants stay within the range of the conference dates are charged to the conference.

For Conference Programmer to automatically calculate and apply charges to each participants that fit this condition, run the Auto Charge wizard (see Section 10.2: Individual Billing).

For Conference Programmer to automatically calculate and apply appropriate charges to the conference, run the Group Bill wizard (see Section 10.1: Group Billing).

5.4 Applying Charges To a Subgroup

Before you can use this feature, you must set up subgroups in your conference (see Section 7.1: Creating a Subgroup).

Consider the situation where you have multiple groups attending a conference. A common scenario is a sports camp consisting of several high schools. Each school can be billed separately. A subgroup can be defined for each high school and the each subgroup can be billed separately.

The Transaction Template for subgroups is identical to that for conferences and participants, except in the Applies To field you must select "Subgroup" (Figure 5-15).

For Conference Programmer to automatically apply charges to a subgroup, run the Auto charge Wizard (see Section 10.3: Subgroup Billing).

The screenshot shows a dialog box titled "Edit Transaction Template". It contains the following fields and options:

- Rate Description:**
 - Rate Name: Double Room Rate
 - Account: Housing (dropdown)
 - \$/Unit: \$17.50
 - Units: Nights (dropdown)
 - Applies To: Subgroup (dropdown)
 - Tax: No Tax (dropdown)
- Add Rate Formula Condition:**
 - Dropdown menu: Room Type = Double
 - Delete button
- Buttons:** OK, Cancel

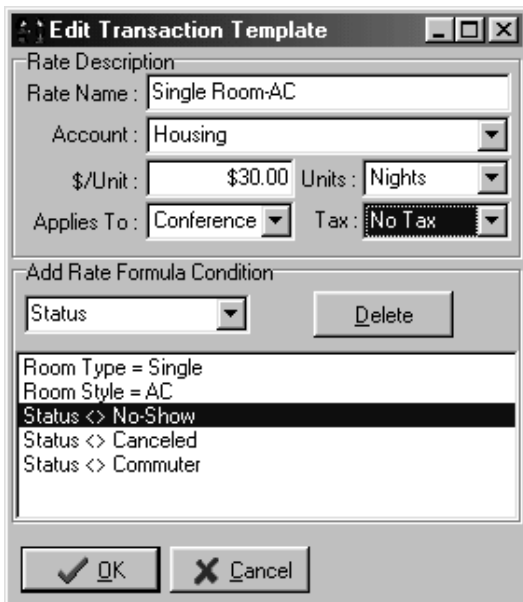
Figure 5-15

Section 5: Transaction Template

5.5 Creating Multiple Value Conditions

Many universities have multiple rates for the same room type within the same conference. Confused? Try to imagine criteria that would warrant different rates within a Double room type. Perhaps you have a different rate for participants that you categorized as Adults, Students, or Seniors. Or, perhaps you have multiple rates depending upon whether a room has air conditioning (“AC”) or not (“Non AC”). In the Transaction Template you may define Rate Names as “Double AC” and “Double Non AC.” You may also want to do the same for Single rooms. The Transaction Template can grow quite large: It is not unusual to have over 100 different rates in their Transaction Template for one conference, yet simple rate schedules might have only 2!

In this example, we will assume there are two rates for a Double room based upon whether the room has AC or Non AC. The first rate is Double Room AC. This rate utilizes the Room Type and Room Style fields (both located on the Participant screen in the Additional Information tab). Figure 5-16 shows a multiple value condition.



The screenshot shows the 'Edit Transaction Template' window. The 'Rate Name' field contains 'Single Room-AC'. The 'Account' dropdown is set to 'Housing'. The '\$/Unit' field is '\$30.00' and the 'Units' dropdown is 'Nights'. The 'Applies To' dropdown is 'Conference' and the 'Tax' dropdown is 'No Tax'. Below these fields is the 'Add Rate Formula Condition' section, which includes a 'Status' dropdown and a 'Delete' button. A list of conditions is shown: 'Room Type = Single', 'Room Style = AC', 'Status <> No-Show' (which is highlighted), 'Status <> Canceled', and 'Status <> Commuter'. At the bottom are 'OK' and 'Cancel' buttons.

Figure 5-16

5.6 Setting Up No Show Charges


If you charge for participants who registered but did not show up, a “No Show” rate must be added to the Transaction Template (you do not need to

Section 5: Transaction Template

call this rate “No Show”). Figure 5-17 shows how you might set this up.

Notice the Units field is set to “N/A.” By choosing N/A, a one-time charge is applied to the participant that satisfies the Rate Formula Condition - not a charge per night. In this case, a participant with a Status of “No Show” is charged \$17.50. This charge will be included in the Housing Account and applied to the conference.

Generally, No Shows are determined at check in. Upon completing your registration, if any participants failed to register, locate their record and change their Status field to “No Show.” The next time you tell Conference Programmer to calculate and apply the charges using Auto charge, the “No Show” charge will apply.



The screenshot shows a dialog box titled "Edit Transaction Template". It has several fields and buttons:

- Rate Description:**
 - Rate Name: No Show Charge
 - Account: Housing
 - \$/Unit: \$17.50
 - Units: N/A
 - Applies To: Conference
 - Tax: No Tax
- Add Rate Formula Condition:**
 - A dropdown menu with "Status" selected.
 - A "Delete" button.
 - A text area containing "Status = No-Show".
- Buttons:** "OK" and "Cancel" at the bottom.

Figure 5-17

5.7 Setting Up Package Rates

Package rates combine the housing, meals, linen and any other charges into one package rate. When using package rates, keep in mind that no detail-by-account reports will be available: If you choose the Housing or Miscellaneous account when setting up the Transaction Template, that is the only account that will have charges applied. You may want to check with your accounting department prior to committing to using package rates.

In this example, we want to charge each member of a conference \$525.00 for their entire stay.

When creating a package rate, select N/A for the Units field. When you select N/A, a one-time charge is applied for the participant whose record satisfies the Rate Formula conditions. If you selected Nights, \$525 would be applied for each night of the participants' stay.

Set up the conditions for the package rate using the same process you use for any Transaction Template item. First, decide what conditions are necessary for this charge to apply (even if you are billing the conference,

Section 5: Transaction Template

Edit Transaction Template

Rate Description

Rate Name : Double Room Rate

Account : Housing

\$/Unit : \$525.00 Units : N/A

Applies To : Conference Tax : No Tax

Add Rate Formula Condition

Status

Room Type = Double
 Status <> No-Show
 Status <> Canceled
 Status <> Commuter

Figure 5-18

the conditions apply to each participant).

Figure 5-18 shows the “Double Room Rate” charge where, if Status <> Canceled, Status <> No Show, Status <> Commuter, and Room Type = Double, a one-time charge of \$525.00 is applied to the conference. We also created a “Single Room Rate” charge where, if Status <> Canceled, Status <> No Show, Status <> Commuter, and Room Type = Single, a one-time charge of \$610.00 is applied to the conference.

Figure 5–19 show the Transaction Template for this example.

Rate Name	Rate Settings	Rate Formula
Double Room Rate	\$525.00 Flat Rate. No Tax. Housing.	Room Type = Double...
Single Room Rate	\$610.00 Flat Rate. No Tax. Housing.	Room Type = Single...

Figure 5-19

5.8 Long Term Billing

The purpose of long-term billing is to distribute charges over a period of time. Generally this method of calculating charges is used for participants staying several weeks and/or months. Examples of the type of participant may include visiting professors and interns. There are at least two reasons why you might want to bill this way:

1. To allow participants to pay weekly or monthly instead of paying a lump sum.
2. To recognize revenue in the month which the participant stayed, rather than recognizing it all on their check-out date.

Section 5: Transaction Template

Figure 5-20 shows the results of a participant being charged monthly. You can see that the charges have been distributed over the length of the participant's stay.

Peter Elich

Peter Elich					
General Additional Info Charges and Payments Events					
Type/Trans #/User	Payment	Charge	Date	Description	
# 1895 - rlh		\$793.88	6/30/20...	Single Room Monthly. Monthly (6/1/2003-6/30/2003). North Tower.	
# 1896 - rlh		\$793.88	7/31/20...	Single Room Monthly. Monthly (7/1/2003-7/31/2003). North Tower.	
# 1897 - rlh		\$793.88	8/31/20...	Single Room Monthly. Monthly (8/1/2003-8/31/2003). North Tower.	

Figure 5-20

Figure 5-21 shows how this participant If would have been charged in the traditional manner in Conference Programmer - one charge for the participant's entire length of stay.

Peter Elich

Peter Elich					
General Additional Info Charges and Payments Events					
Type/Trans #/User	Payment	Charge	Date	Description	
# 1894 - rlh		\$2,434.55	9/1/2003	Single Room. 92 Nights @ \$25.00/Night. North Tower.	

Figure 5-21

There are two methods of using the long term billing functionality:

1. Daily, weekly or monthly charges prorated by the day, week or month.
2. Prescribed schedule of charges.

Monthly Charge Prorated By the Day.

Be sure you are working in the conference you want to add long term billing to.

1. Click the Transaction Template tab, then click the Long Term button on the toolbar (Figure 5-22). The Long Term Billing window will open (Figure 5-23).

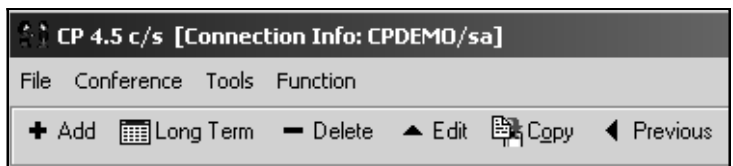
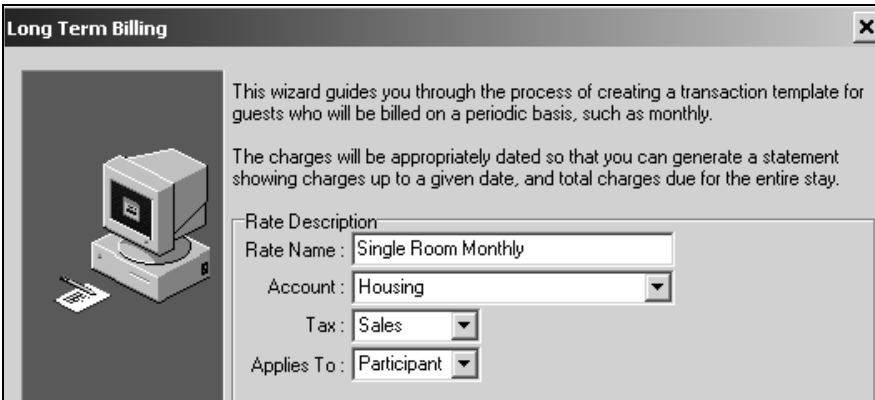


Figure 5-22

Section 5: Transaction Template



Long Term Billing

This wizard guides you through the process of creating a transaction template for guests who will be billed on a periodic basis, such as monthly.

The charges will be appropriately dated so that you can generate a statement showing charges up to a given date, and total charges due for the entire stay.

Rate Description:

Rate Name : Single Room Monthly

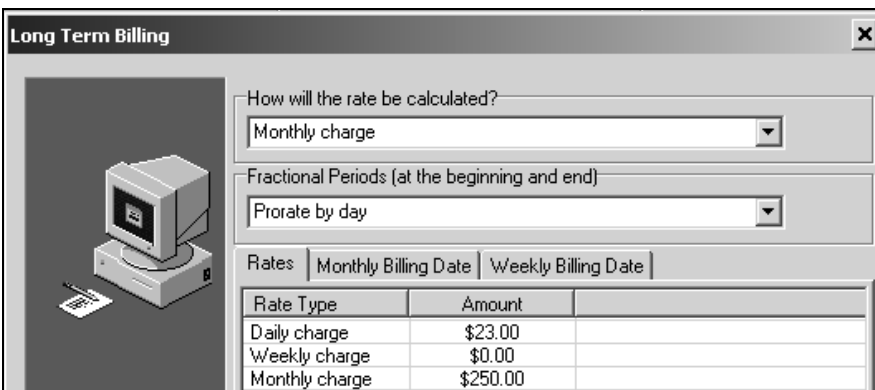
Account : Housing

Tax : Sales

Applies To : Participant

Figure 5-23

2. Enter the Rate Name. This can be anything you choose. Keep in mind, this is the rate that will appear on the customer's invoice. In this example, we called the rate "Single Room Monthly" and we plan to apply charges to the participant, charge sales tax, and post the charges to the Housing account. Click the Next button.
3. Select "Monthly charge" for how the charge will be calculated (Figure 5-24).



Long Term Billing

How will the rate be calculated?

Monthly charge

Fractional Periods (at the beginning and end)

Prorate by day

Rates | Monthly Billing Date | Weekly Billing Date

Rate Type	Amount
Daily charge	\$23.00
Weekly charge	\$0.00
Monthly charge	\$250.00

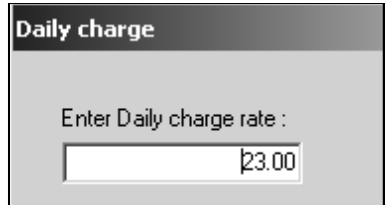
Figure 5-24

Select "Prorate by day" for the fractional periods at the beginning and end of the participant's stay.

4. In the Rates tab, double-click the charge you want to edit (Figure 5-25). In this example, we have entered a monthly and daily rate. The daily rate is used to calculate fractions of months the participant stays.

Section 5: Transaction Template

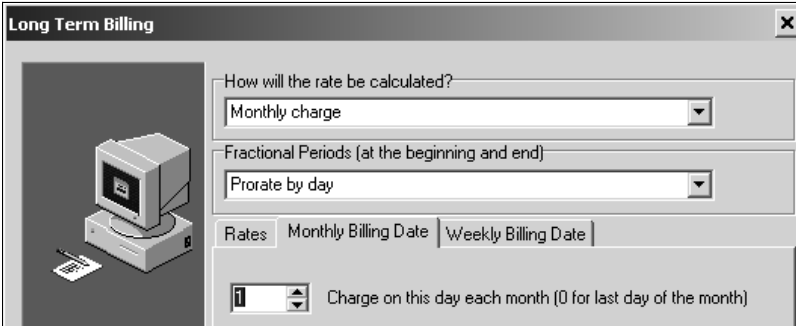
- In the Monthly Billing Date tab, enter the date each month you want this charge applied (Figure 5-26). A value of 0 represents the last day of the month. Typically, you would select 1 for the first day of the month.



Daily charge

Enter Daily charge rate :

Figure 5-25



Long Term Billing

How will the rate be calculated?

Monthly charge

Fractional Periods (at the beginning and end)

Prorate by day

Rates Monthly Billing Date Weekly Billing Date

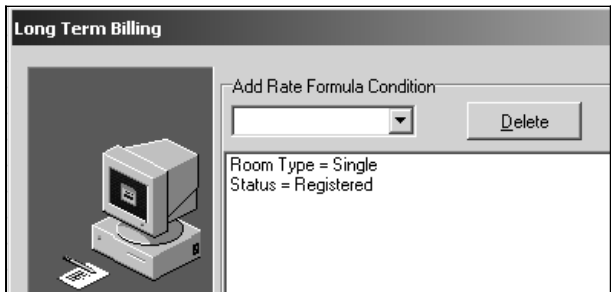
Charge on this day each month (0 for last day of the month)

Figure 5-26

The Weekly Billing Date tab is used for weekly billing and is addressed in the next example. No weekly billing date is required in the current example.

- Click the Next button.

This screen is identical to the bottom portion of a transaction template item's screen. Here you enter the conditions a participant must have for this rate to apply (see Section 5.1: Setting Up a Transaction Template).



Long Term Billing

Add Rate Formula Condition

Room Type = Single
Status = Registered

Delete

Figure 5-27

- Once you have entered the rate formula conditions, click the Next button. This is important! Nothing will be saved if you do not finish the wizard.

To apply charges to the participants, you must run the Auto Charge wizard or Auto charge a specific participant (see Section 10.2: Individual Billing).

Section 5: Transaction Template

Weekly Billing Prorated by Week and Day

Be sure you are working in the conference you want to add long term billing to.

1. Click the Transaction Template tab, then click the Long Term button on the toolbar (Figure 5-28). The Long Term Billing window will open (Figure 5-29).

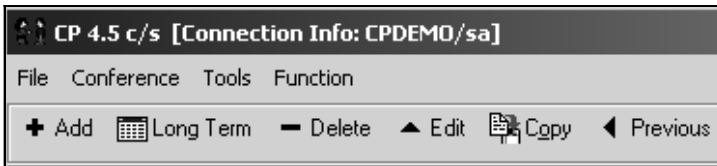


Figure 5-28

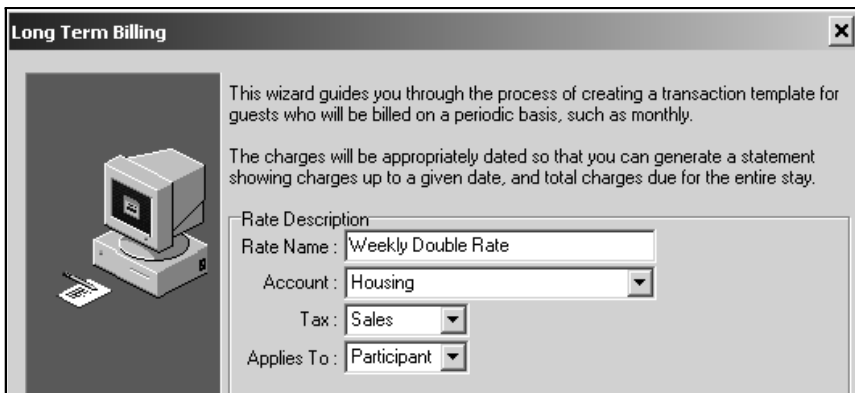


Figure 5-29

2. Enter the Rate Name. This can be anything you choose. Keep in mind, this is the rate that will appear on the customer's invoice. In

this example, we called the rate "Weekly Double Rate" and we plan to apply charges to the participant, charge sales tax, and post the charges to the Housing account. Click the Next button.

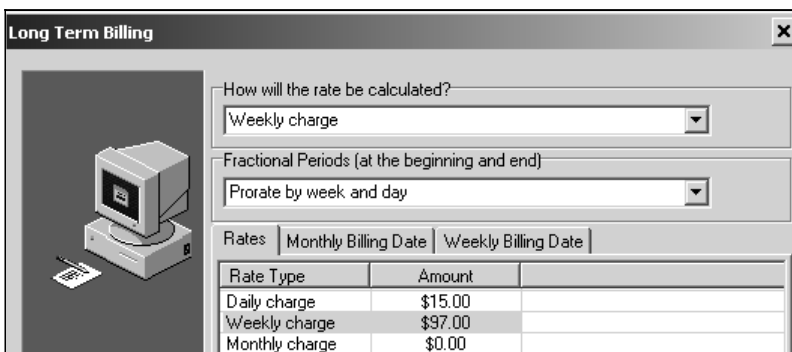


Figure 5-30

Section 5: Transaction Template

2. Select “Weekly charge” for how the charge will be calculated (Figure 5-30).

Select “Prorate by week and day” for the fractional periods at the beginning and end of the participant’s stay.

4. In the Rates tab, double-click the charge you want to edit (Figure 5-31). In this example, we have entered a daily and weekly rate. The daily rate is used to calculate fractions of weeks the participant stays.

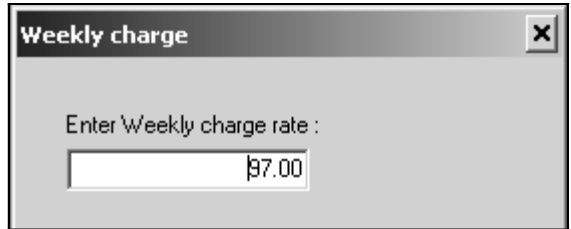


Figure 5-31

The Monthly Billing Date tab is used for monthly billing and is addressed in the previous example. No monthly billing date is required in the current example.

5. The Weekly Billing Date tab is an important step regarding your billing cycle. Some users of Conference Programmer use a specific day of the week to start the weekly billing cycle. Sunday is a common start day (Figure 5-32).

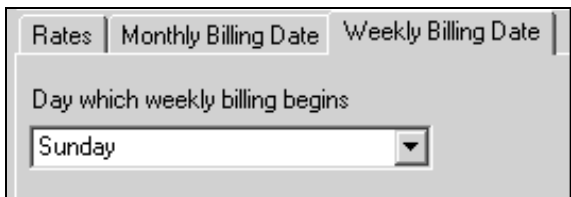


Figure 5-32

In this example, if a participant checks in on Friday and stays for 2 weeks, the daily rate would apply for the first Friday and Saturday. Beginning on the first Sunday, the weekly billing rate would take effect. The participant will be charged weekly from Sunday to Sunday. Since the participant checks out on a day other than Sunday, the daily rate would apply for the days beyond the last Sunday.

You may choose to begin the weekly billing cycle on the day the participant checks in, or “Start Date”.

If “Start Date” is chosen, a participant checking in on a Friday, would be billed weekly from Friday to Friday. This would repeat for the number of weeks the participant stays.

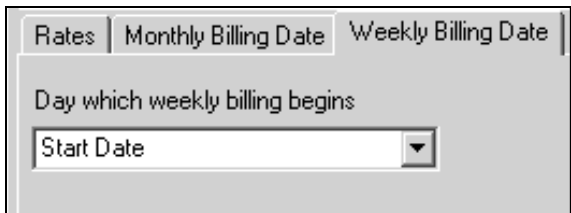


Figure 5-33

Section 5: Transaction Template

If they check out any day other than Friday, the daily rate would apply for the number of days beyond the last Friday.

- Click the Next button.

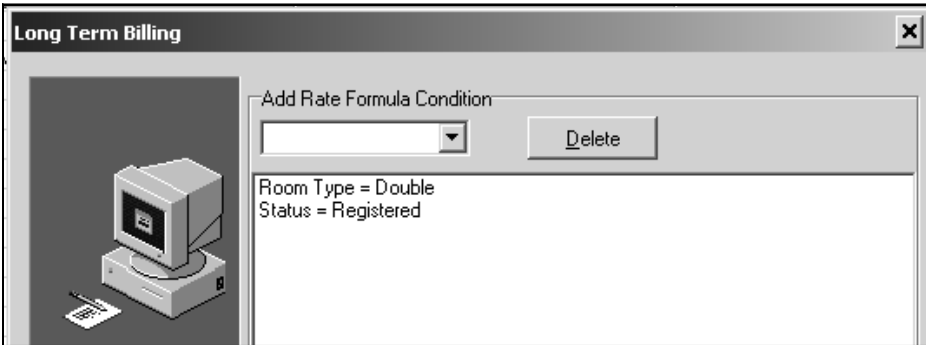


Figure 5-34

This screen is identical to the bottom portion of a transaction template item's screen. Here you enter the conditions a participant must have for this rate to apply (see Section 5.1: Setting Up a Transaction Template).

- Once you have entered the rate formula conditions, click the Next button. This is important! Nothing will be saved if you do not finish the wizard.

To apply charges to the participants, you must run the Auto Charge wizard or Auto charge a specific participant (see Section 10.2: Individual Billing).

Figure 5-35 shows the charges for a weekly billing cycle that begins with a specific day of the week. In this case, "Sunday."

General Additional Info Charges and Payments Events					
Type/Trans #...	Payment	Charge	Date	Description	
# 2164 - rlh		\$79.39	6/3/2003	Weekly Double Rate. Partial (6/3/2003-6/8/2003). North Tower.	
# 2165 - rlh		\$102.67	6/8/2003	Weekly Double Rate. Weekly (6/8/2003-6/15/2003). North Tower.	
# 2166 - rlh		\$102.67	6/15/20...	Weekly Double Rate. Weekly (6/15/2003-6/22/2003). North Tower.	
# 2167 - rlh		\$102.67	6/22/20...	Weekly Double Rate. Weekly (6/22/2003-6/29/2003). North Tower.	
# 2168 - rlh		\$95.27	6/29/20...	Weekly Double Rate. Partial (6/29/2003-7/5/2003). North Tower.	

Figure 5-35

Section 5: Transaction Template

Figure 5-36 shows the charges for a “Start Date” weekly billing cycle.

General Additional Info Charges and Payments Events				
Type/Trans #...	Payment	Charge	Date	Description
# 2159 - rlh		\$102.67	6/3/2003	Weekly Double Rate. Weekly (6/3/2003-6/10/2003). North Tower.
# 2160 - rlh		\$102.67	6/10/20...	Weekly Double Rate. Weekly (6/10/2003-6/17/2003). North Tower.
# 2161 - rlh		\$102.67	6/17/20...	Weekly Double Rate. Weekly (6/17/2003-6/24/2003). North Tower.
# 2162 - rlh		\$102.67	6/24/20...	Weekly Double Rate. Weekly (6/24/2003-7/1/2003). North Tower.
# 2163 - rlh		\$63.51	7/5/2003	Weekly Double Rate. Partial (7/1/2003-7/5/2003). North Tower.

Figure 5-36

Prescribed Schedule of Charges

This is not the most common method of applying long term charges. However, it can be very useful if you do not have much variability in the participants' arrival and departure dates, and you have a fixed schedule of when charges are to be assigned.

For example, all participants in a summer session group will be arriving 6/9/2004 and departing 8/5/2004, and a single room costs \$500 upon check-in, \$1000 on 6/30/2004, and \$210 on 7/30/2004.

Be sure you are working in the conference you want, and click the Transaction Template tab. Click on the “Long Term” button on the toolbar (Figure 5-37). The Long Term Billing window will open (Figure 5-38).

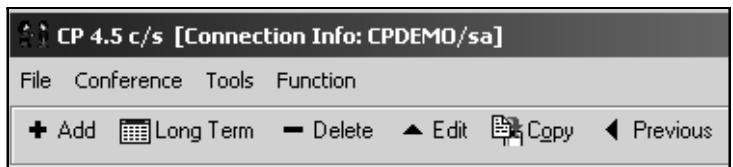
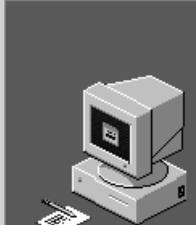


Figure 5-37

Long Term Billing [X]



This wizard guides you through the process of creating a transaction template for guests who will be billed on a periodic basis, such as monthly.

The charges will be appropriately dated so that you can generate a statement showing charges up to a given date, and total charges due for the entire stay.

Rate Description:

Rate Name:

Account:

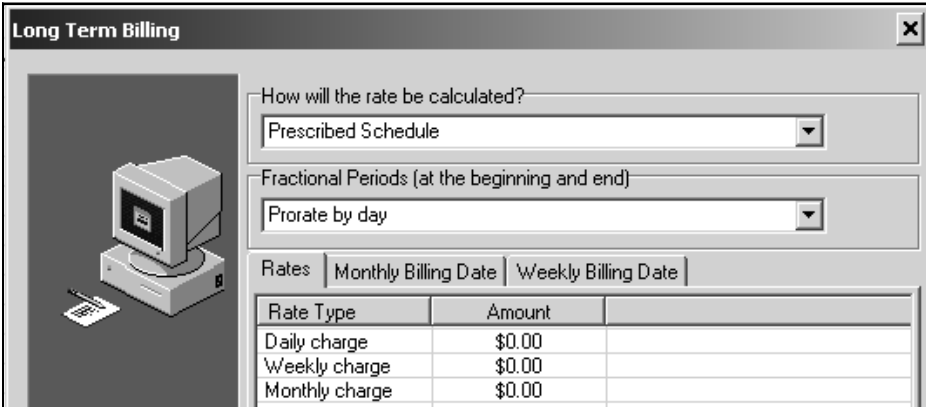
Tax:

Applies To:

Figure 5-38

Section 5: Transaction Template

1. Enter the Rate Name. This can be anything you choose. Keep in mind, this is the rate that will appear on the customer's invoice. In this example, we called the rate "Single Prescribed Plan" and we plan to apply charges to the participant, apply no tax, and post the charges to the Housing account. Click the Next button.



Long Term Billing

How will the rate be calculated?
Prescribed Schedule

Fractional Periods (at the beginning and end)
Prorate by day

Rates | Monthly Billing Date | Weekly Billing Date

Rate Type	Amount	
Daily charge	\$0.00	
Weekly charge	\$0.00	
Monthly charge	\$0.00	

Figure 5-39

2. Select "Prescribed Schedule" for how the charge will be calculated (Figure 5-39).
3. You must choose an option for Fractional Periods even though none will be used. All other items on this screen are ignored.



Long Term Billing

Add Edit Delete

Prescribed Charges

Amount and Dates

Amount : \$500.00

Start : 6/9/2004

End : 6/29/2004

Ok Cancel

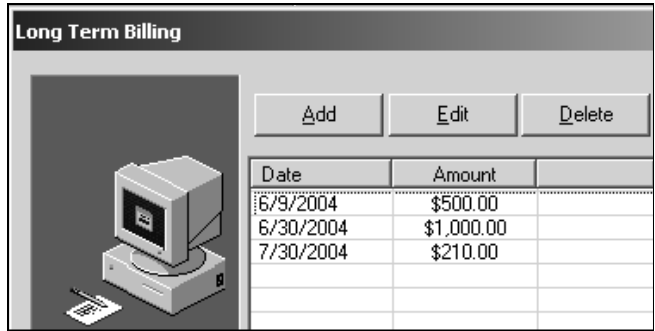
Figure 5-40

4. Click the Next button.
5. Click the Add button (Figure 5-40). For the first charge in your schedule, enter the Amount, Start date, and End date. Click the OK button. This example of prescribed charges will have 3 different amounts for 3 dates, so you will repeat this step 2 more times (Figure 5-41).

Section 5: Transaction Template

6. Click the Next button.

This screen is identical to the bottom portion of a transaction template item's screen. Here you enter the conditions a participant must have for this rate to apply (see Section 5.1: Setting Up a Transaction Template).



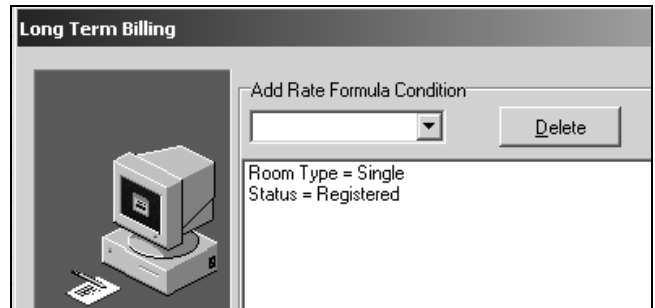
The screenshot shows a window titled "Long Term Billing". On the left is an icon of a computer monitor and keyboard. On the right, there are three buttons: "Add", "Edit", and "Delete". Below these buttons is a table with columns "Date" and "Amount".

Date	Amount
6/9/2004	\$500.00
6/30/2004	\$1,000.00
7/30/2004	\$210.00

Figure 5-41

7. Once you have entered the rate formula conditions, click the Next button. This is important! Nothing will be saved if you do not finish the wizard.

To apply charges to the participants, you must run the Auto charge wizard or Auto charge a specific participant (see Section 10.2: Individual Billing).



The screenshot shows the "Long Term Billing" window with the "Add Rate Formula Condition" dialog box open. The dialog has a dropdown menu and a "Delete" button. Below the dialog, the conditions "Room Type = Single" and "Status = Registered" are listed.

Figure 5-42

Figure 5-43 shows the charges for a prescribed schedule billing cycle.

General Additional Info Charges and Payments Events				
Type/Trans #/User	Payment	Charge	Date	Description
# 2120 - rlh		\$500.00	6/9/2004	Single Prescribed Plan. Installment #1. North Tower.
# 2121 - rlh		\$1,000.00	6/30/2004	Single Prescribed Plan. Installment #2. North Tower.
# 2122 - rlh		\$210.00	7/30/2004	Single Prescribed Plan. Installment #3. North Tower.

Figure 5-43

Section 6: Events Template

6 Events Template

Conference Programmer uses the term “event” loosely: An event is an item or event where charges or participation is tracked on a per-participant basis. A particular conference might offer events, classes, banquets, T-shirts, tickets to a tour, parking permits, etc. A participant can register for one, any, or all of the events, and another participant can have a different selection of events. A participant can also register for more than one of any particular event. If there is a charge associated with the events they choose, that charge may be applied to the participant, the subgroup, or the conference.

6.1 Creating Events

1. In the browse tree, click Conferences and click the Events Template tab (Figure 6-1).
2. Click the Add button on the toolbar (Figure

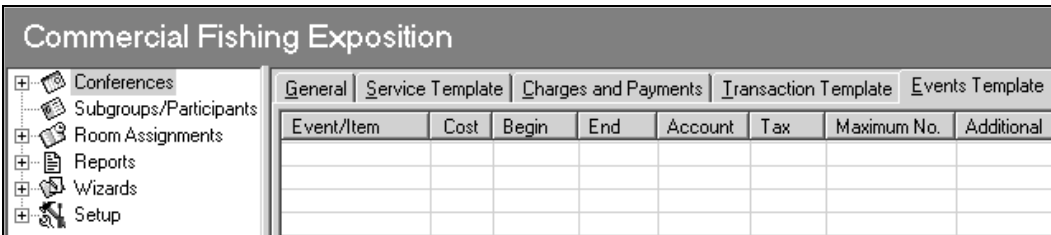


Figure 6-1



Figure 6-2

6-1), or right click anywhere in the window and select Add. The Event Item window will open (Figure 6-2).

3. Set up the event.

Enter the name of the event in the Name field. The event name will also show up on customers' bills.

The date that the event is created is automatically entered in the Date field. You can ignore this field if your “event” doesn't have a date or, if your event it date-sensitive you can enter the date of the event here.

Some events span multiple days. If your event

Section 6: Events Template

has an end date that is different than the start date, enter the end date in the End field. The End field is not required and is seldom used.

The No. field is optional. If you are using the Advanced Web Module and your event has a maximum capacity, enter it here. For example, if you only have 100 T-shirts to sell, and you are allowing participant to register for this conference (and this event) via the web, enter 100 here and the Web Module will only allow the first 100 registrations for this event. **Note:** If you specify a maximum number for this event, the Advanced Web Module will prevent more than that number of web registrations for this event, but you will be able to register more than that maximum number by manually registering participants for this event.

You must enter charge information for each event, even if you are not going to charge for an event. If you are not charging for an event, you can enter 0 (zero) in the Charge field, and can make any selection you want in the Tax and Account fields.

The Location field is optional, and holds any text you type up to 50 characters in length. You can enter the name of the location for this event, or some brief notes.

In the Applies To field, select whether to apply the charges to the participant, the subgroup, or the conference.

Set the Sort field to list the event in the order you want (see Section 1.11: Sort Fields).

6.2 Deleting Events

If you delete an event, it is removed from the list of events for every participant in the conference, and it is removed from the web registration if you are using the Advanced Web Module for this conference. If any participants have already registered for an event, you will get an error saying that you are not able to delete the event until there are no participants registered for it.

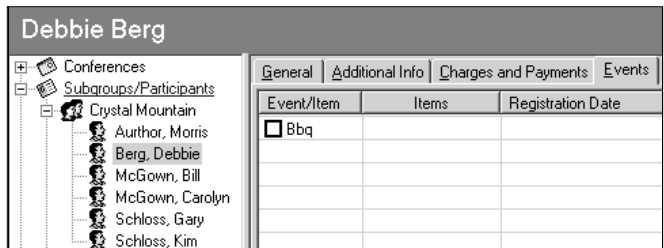


Figure 6-3

1. In the browse tree, click Conferences and click the Events Template tab.

Section 6: Events Template



Figure 6-4

2. Click the name of the event you want to delete and click the Delete button on the toolbar, or right click on the name of the event and select Delete. Click the OK button to confirm that you want to delete the event (Figure 6-4).

6.3 Registering Participants For Events

Since each participant can register for different events, the event is selected from the Participant's Events tab.

1. In the browse tree, expand Subgroups/Participants and click on the Participant you want to register for events (Figure 6-3). You may have to also expand the name of the subgroup in order to see the list of participants, if you have participants within subgroups.
2. Click the Events tab. The list of events available for the conference is displayed. Check the box next to the event or events this participant wishes to register for (Figure 6-5).

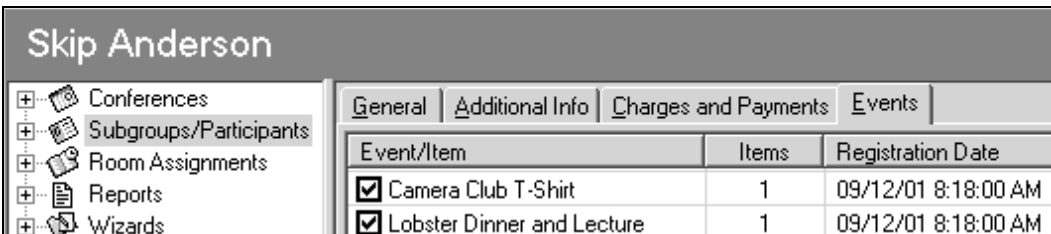


Figure 6-5



Figure 6-6

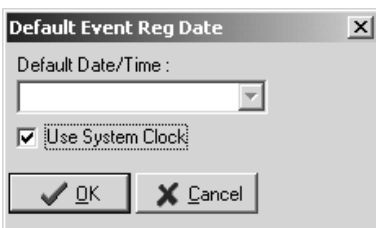


Figure 6-7

The Registration Date field will automatically contain the date and time that the event was selected. This date represents the date and time that the event was registered for, and may be useful for tracking the first participants to register for an event, in case too many participants register for a maximum capacity event. If you want to register a participant for a different date or time, click the Set Registration Date button on the toolbar (Figure 6-6). The Default Event Reg Date window will open (Figure 6-7). If the "Use System Clock" checkbox is checked, the current date and time will automatically be entered for you when you register a participant for an event. If you uncheck the box, you can enter any date and time you want, which will be entered for you when you register a participant for an event.

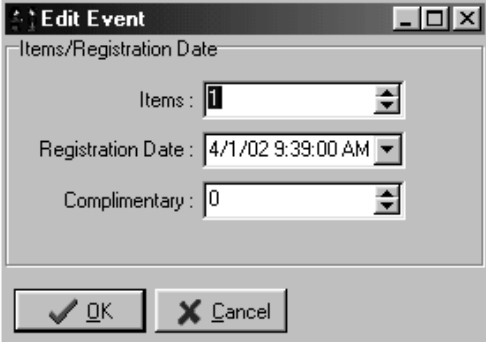
Section 6: Events Template

3. Click the Post button on the toolbar when you are finished registering a participant for events.

6.4 Additional Quantities

A participant may want to bring one or more guests to an event, or may want to register for more than one of an event such as T-shirts or tour tickets. You may add as many additional items to a participant's record for each event as needed.

1. On the participant's Event tab, double-click the name of the desired event (do not double-click the checkbox!). In this example, we'll choose the Lobster Dinner and Lecture. The Edit Event window will open (Figure 6-8).
2. Customize the event.



The screenshot shows a dialog box titled "Edit Event". It contains three input fields: "Items" with a value of 1, "Registration Date" with a value of 4/1/02 9:39:00 AM, and "Complimentary" with a value of 0. At the bottom are "OK" and "Cancel" buttons.

Figure 6-8

The Items field shows how many of this event the participant is registering for. The default value is 1. Set it to the total number of registrations for this event for this participant. In the example, Skip wants to bring three more guests, so set the Items field to 4.

The Complimentary field is used to enter the number of registrations for this event that are being given to this participant at no charge. In this example, Skip is registering for 4 of the Lobster Dinner and Lecture event, and we are giving none to him for free, so his charges will be 4 times the charge for this event. If we enter 2 in the Complimentary field, Skip will be registering for 4 of the Lobster Dinner and Lecture event, and we would be giving 2 of those to him for free; he would only be charged for 2.

3. Click the OK button to save your changes to the event, or click the Cancel button to close the event without saving your changes.

Section 7: Subgroups

7 Subgroups

The ability to work with subgroups is a very powerful feature of Conference Programmer. A subgroup is a group of participants within a conference. Think of a subgroup as a mini conference within a conference. For example, a conference called “Football Camp” might have a subgroup for each team, “Team A” and “Team B.” For each subgroup you may block and assign rooms, view certain reports more specifically, and, most importantly, apply charges and create an invoice. Billing a subgroup is accomplished through the Auto Charge wizard (see Section 10.3: Subgroup Billing).

You can create subgroups prior to or after entering participants, although creating them before you enter participants is easier. Subgroups are listed under Subgroups/Participants in the browse tree and are indicated by a two-person icon. Participants are indicated by a one-person icon.

7.1 Creating a Subgroup

There are two ways to add a subgroup. When you first create a conference and there are no subgroups, you can create one from the Participant General tab. Once at least one subgroup exists, you can more easily create other subgroups from the Subgroup General tab.

Creating a Subgroup From the Participant General Tab

1. In the browse tree, click Subgroups/Participants, then click the General tab (Figure 7-1).

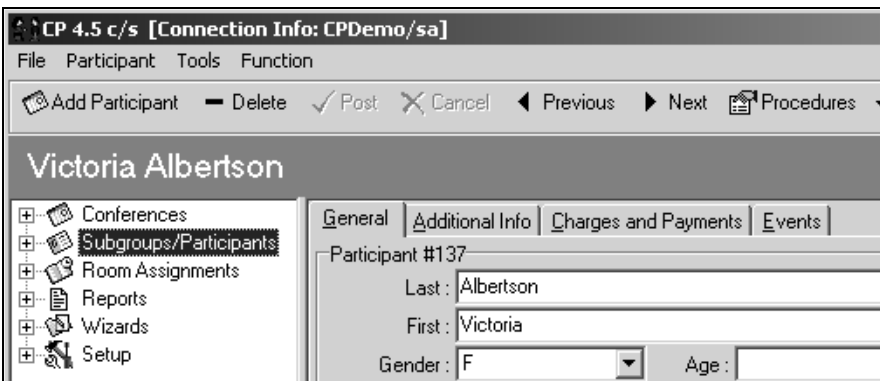


Figure 7-1

Section 7: Subgroups

2. Click the Procedures button on the toolbar and select Add Subgroup. The New Subgroup Name window will open (Figure 7-2).
3. Enter a name for this subgroup and click the OK button.



Figure 7-2

When you expand Subgroups/Participants in the browse tree you will see a list of all subgroups, and any participants not assigned to a subgroup. When you expand a subgroup in the browse tree, you will see a list of participants in that subgroup.

4. In the browse tree, click on the name of the subgroup you just created and click the General tab. You may enter the name of the group contact in the Last and First fields. You may even apply charges to the subgroup on the Subgroup Charges and Payments tab (see Section 10.3: Subgroup Billing).

Creating a Subgroup From the Subgroup General Tab

1. In the browse tree, expand Subgroups/Participants and click on the name of any existing subgroup, then click the General tab (Figure 7-3).
2. Click the Add Subgroup button on the toolbar. A blank Subgroup screen will appear in the main portion of the window (Figure 7-4).

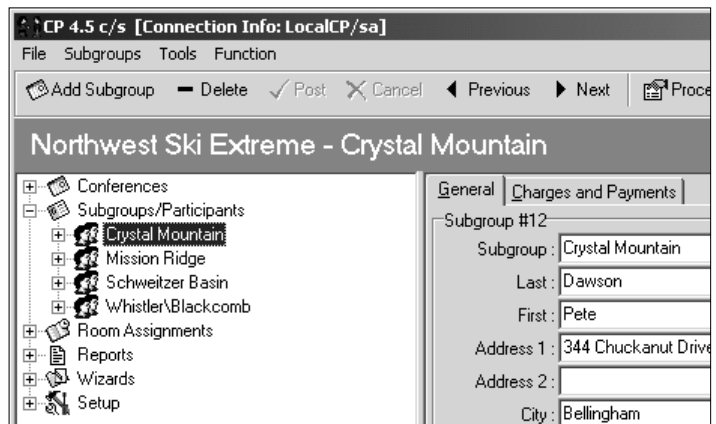


Figure 7-3

3. Enter the name of the subgroup in the Subgroup field. This is the only required information for a subgroup, but if you will be billing or blocking rooms for this subgroup, you will want to enter contact information and a start and end date.

Section 7: Subgroups

General | Charges and Payments

Conference Name and Contact Information

Subgroup:

Last:

First:

Address 1:

Address 2:

City:

State: Post Code:

Country:

Title:

Phone:

Fax:

E-Mail:

Confirmation

Other Information

Event Date:

Check-Out:

Nights: 0

Housing:

Commuters:

User Def 1:

User Def 2:

User Def 3:

User Def 4:

User Def 5:

User Def 6:

User Def 7:

User Def 8:

Subgroup No.: 66

Figure 7-4

4. You may enter the name of the group contact in the Last and First fields. You may even apply charges to the subgroup on the Subgroup Charges and Payments tab (see Section 10.3: Subgroup Billing). Figure 7-5 shows that Hank Kashua is the contact for the Mission Ridge subgroup and is responsible for this subgroup's charges.

Mission Ridge

Conferences

Subgroups/Participants

- Crystal Mountain
- Mission Ridge
- Schwitzer Basin
- Wistler\Blackcomb

Room Assignments

Reports

Wizards

Setup

General | Charges and Payments

Conference Name and Contact Information

Subgroup: Mission Ridge

Last: Kashua

First: Hank

Address 1: 251 North Shore Rd

Address 2:

City: Ellensburg

State: WA Post Code: 97885

Figure 7-5

When you expand Subgroups/Participants in the browse tree you will see a list of all subgroups, and any participants not assigned to a subgroup. When you expand a subgroup in the browse tree, you will see a list of participants in that subgroup.

Section 7: Subgroups

Figure 7-6 shows four subgroups and a list of previously entered participants attending the Northwest Ski Extreme conference who are not assigned to a subgroup. The subgroups are displayed first and are indicated by a two-person icon. Participants not assigned to subgroups are displayed below the subgroups and are indicated by a one-person icon.

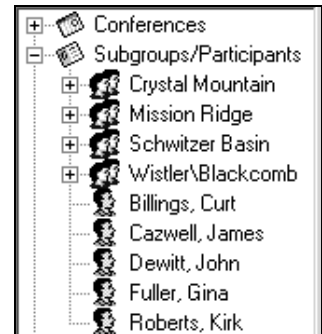


Figure 7-6

7.2 Deleting Subgroups

To remove a subgroup, click on the name of the subgroup in the browse tree and click the General tab. Then click the Delete button on the toolbar. The subgroup will be removed. You cannot delete a subgroup if there are participants assigned to it (Figure 7-7), or if there are any charges or payments associated with the subgroup. In that case you must delete or reassign those participants, charges, and payments before you can delete the subgroup.

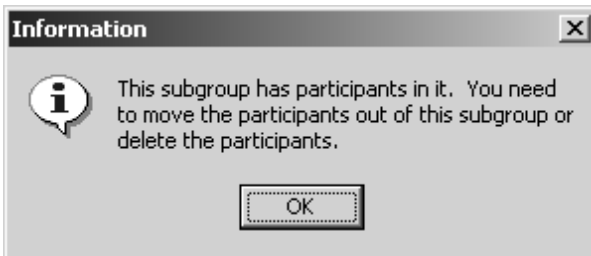


Figure 7-7

7.3 Moving Subgroups

Once a subgroup has been created, it is possible to move it, and all of its participants, charges, and payments, to another conference. This is useful if you have accidentally entered the subgroup in the wrong conference, or are restructuring conferences for better management.

Figure 7-8 shows a subgroup called “The Tigers” in our Northwest Ski Extreme conference; we do not want this subgroup in this conference.

1. In the browse tree, click the name of the subgroup you want to move to another conference (Figure 7-8).

Section 7: Subgroups

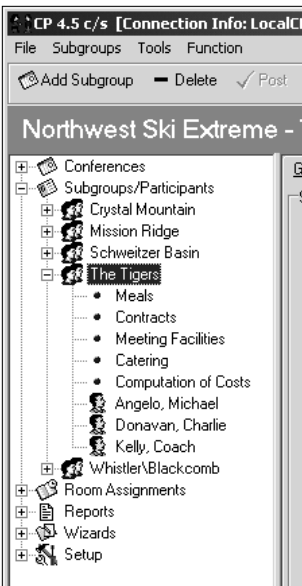


Figure 7-8

2. Click the Procedures button on the toolbar and select Move Subgroup. The Select Conference window will open (Figure 7-9).

3. Select the conference you want to move the subgroup to and click the OK button.

4. Click the OK button in the confirmation window that opens (Figure 7-10).

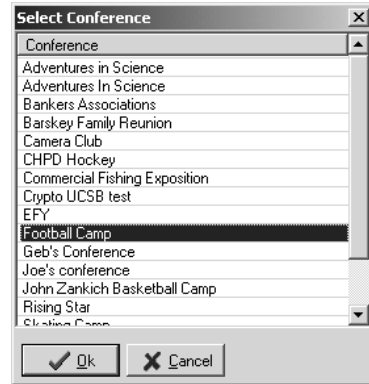


Figure 7-9

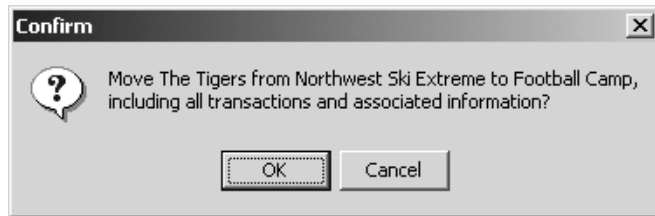


Figure 7-10

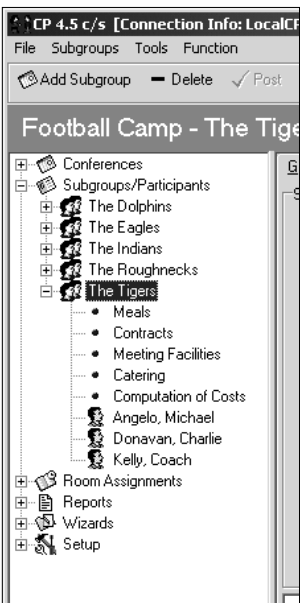


Figure 7-11

Figure 7-11 shows the Football Camp conference after we have moved the subgroup “The Tigers” to it.

7.4 Assigning Participants To Subgroups

There are three methods to assign participants to subgroups. The first way is to enter the participant in the correct subgroup from the beginning; if you have not yet entered participants, you can enter them manually or use the Batch Participant Entry wizard to enter them and simultaneously assign them to subgroups. If you have already entered participants and they are not assigned to subgroups, you can use the Assign Participants to Subgroup wizard.

Section 7: Subgroups

Assign Participants To Subgroups When Entering Participants Manually

In Section 2.2: Entering Participants, you clicked the Add Participant button on the toolbar to add a new participant. What you were actually doing was adding a participant to the currently selected subgroup: The “No Sub-Group” subgroup.

Every conference has at least one subgroup, called “No Sub-Group.” If you do not create any other subgroups, this one remains hidden. Unless you assign participants to another subgroup, they are automatically assigned to the “No Sub-Group” subgroup. If there are no other subgroups, the participants appear as members of the conference, not members of the subgroup called “No Sub-Group.”

This makes it easy to assign participants to a specific subgroup when entering the participant: Just be sure the subgroup you want to assign them to is selected when you click the Add Participant button in the toolbar.

If there are no participants entered in the subgroup yet:

1. In the browse tree, click the name of the subgroup you want to enter participants in, then click the Procedures button on the toolbar and select “Add Participant” (Figure 7-12).

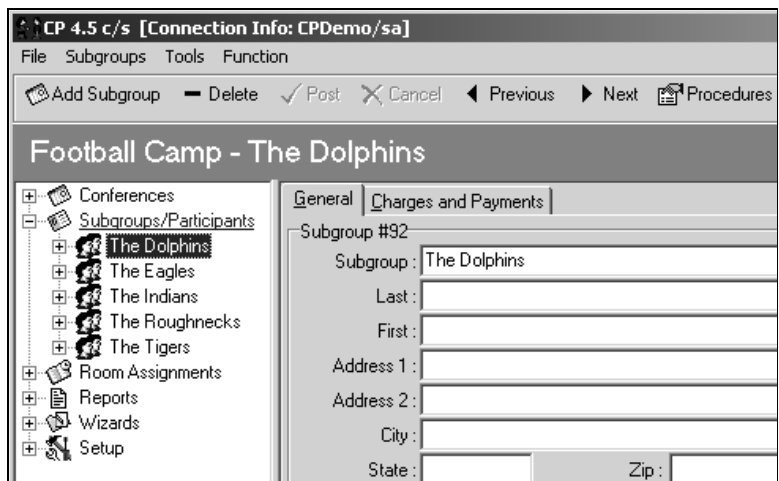


Figure 7-12

2. A blank Participant General tab will be displayed and you can enter your participant's information. When you click the Post button on the toolbar, the participant will be entered into the selected subgroup.

Section 7: Subgroups

If there is already at least one participant assigned to this subgroup:

1. Click the name of a participant in the subgroup you want to assign the new participant to, then click the Add Participant button on the toolbar (Figure 7-13).

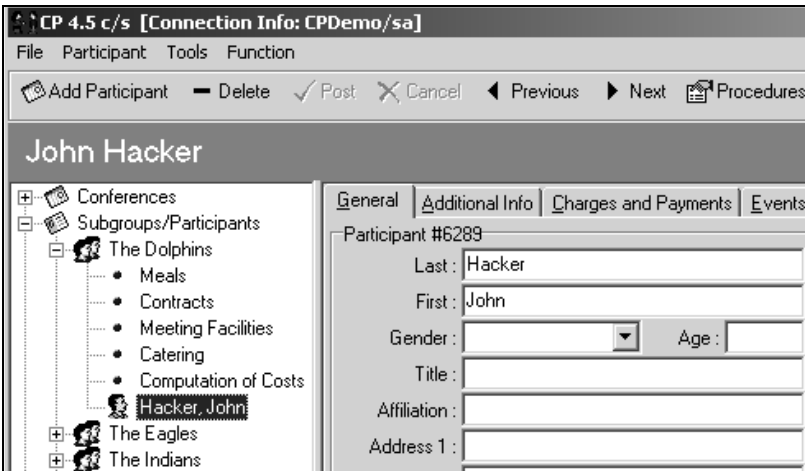


Figure 7-13

2. A blank Participant General tab will be displayed and you can enter your participant's information. When you click the Post button on the toolbar, the participant will be entered into the selected subgroup.

Assign Participants To Subgroups with the Batch Participant Entry Wizard

Northwest Ski Extreme
assignment list with subgroups, page 1

Name (last, first)	Gen	Building & Room	Room Type
Crystal Mountain			
		North Tower 0130B	Double
		North Tower 0130B	Double
		North Tower 0140A	Double
Mission Ridge			
		North Tower 0160B	Double
		North Tower 0160B	Double
		North Tower 0170A	Double
		North Tower 0170A	Double

Figure 7-14

With the Batch Participant Entry wizard, you have the functionality to enter participants into a conference and, in the same process, assign participants to the appropriate subgroups. The best approach to accomplish this is to send the contact person for the conference or for the subgroup the "Assignment List-Subgroups" report (in report folder #6) (Figure 7-14). Instruct the contact person to write the name and gender of each of their participants in the preferred room under the appropriate subgroup heading.

Section 7: Subgroups

Upon receiving the report back from the contact, use the Batch Participant Entry wizard to enter the participants and assign them to their appropriate subgroups (see Section 2.2: Entering Participants).

Assign Participants To Subgroups with the Assign Participants to Subgroup Wizard

1. In the browse tree, click Subgroups/Participants and click the General tab.
2. Click the Procedures button on the toolbar and select Assign Participants to Subgroups.
3. Click the Next button. The Assign Participants to Subgroups window will open (Figure 7-15).

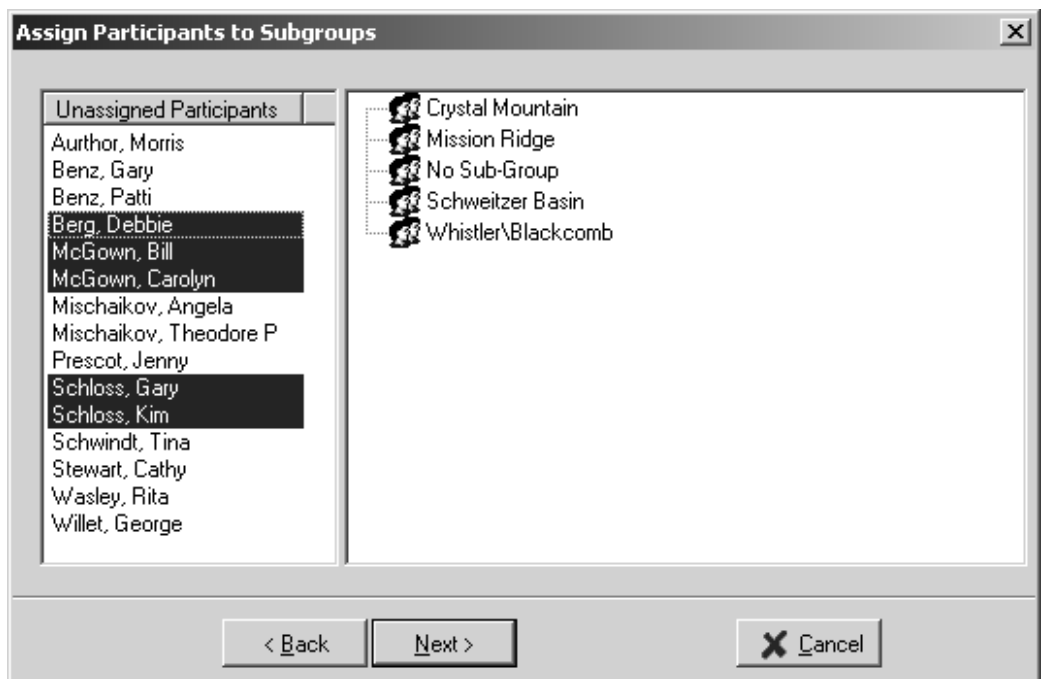


Figure 7-15

The left side of this window shows all participants not assigned to a subgroup - they are still participants of the conference, but not in any subgroup. The right side of the window lists all the subgroups, including the invisible “No Sub-Group” subgroup.

Section 7: Subgroups

4. Click on a participant's name to select that participant. To select more than one participant at a time, hold the Control key on the keyboard down, click on any other participants' names, and release the Control key.
5. Click-and-drag one of the highlighted names to the correct subgroup.

The participants will disappear from the list on the left and are now assigned to the subgroup. You can expand a subgroup to view its participants (Figure 7-16).

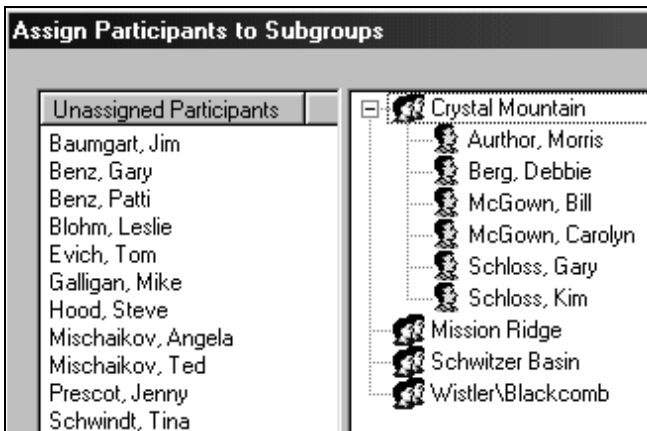


Figure 7-16

6. Once all participants have been assigned to their subgroups, click the Next button. Conference Programmer will run through the process of reassigning all participants to their appropriate subgroup. When the routine is finished, click the OK button to exit the wizard.

Removing Participants From Subgroups

1. In the browse tree, click Subgroups/Participants and click the General tab.
2. Click the Procedures button on the toolbar and select Assign Participants to Subgroups.
3. Click the Next button. The Assign Participants to Subgroups window will open (Figure 7-17).
4. Expand a subgroup to view its participants, then click on the name of the participant you want to remove from the subgroup, drag that



Figure 7-17

participant to the left half of the window - the Unassigned Participants side - then release the mouse button. You can reassign this participant to a different subgroup by clicking-and-dragging them to the new subgroup now, or you can leave them unassigned.

7.5 Searching For Subgroups

You can search for a subgroup in any conference if you know part of the subgroup's name.

1. Click the Locate button on the toolbar and select Subgroup Search. The Subgroup Search window will open (Figure 7-18).
2. Make sure the Field is set to Subgroup Name. Enter the first few characters of the subgroup you are searching for in the

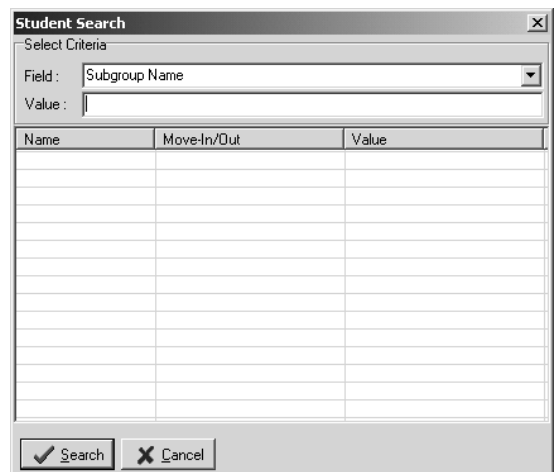
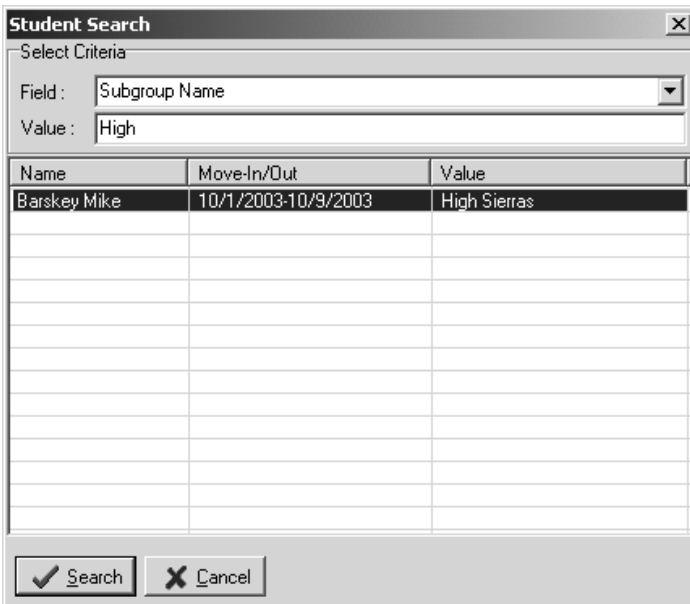


Figure 7-18

Section 7: Subgroups



Student Search [X]

Select Criteria

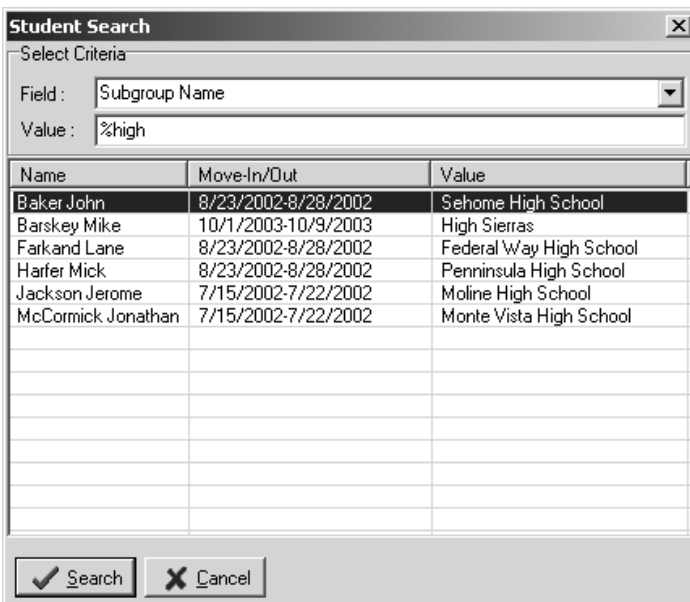
Field: Subgroup Name

Value: High

Name	Move-In/Out	Value
Barskey Mike	10/1/2003-10/9/2003	High Sierras

[Search] [Cancel]

Figure 7-19



Student Search [X]

Select Criteria

Field: Subgroup Name

Value: %high

Name	Move-In/Out	Value
Baker John	8/23/2002-8/28/2002	Sehome High School
Barskey Mike	10/1/2003-10/9/2003	High Sierras
Farkand Lane	8/23/2002-8/28/2002	Federal Way High School
Harfer Mick	8/23/2002-8/28/2002	Penninsula High School
Jackson Jerome	7/15/2002-7/22/2002	Moline High School
McCormick Jonathan	7/15/2002-7/22/2002	Monte Vista High School

[Search] [Cancel]

Figure 7-20

Value field, then click the Search button. If there are any subgroups that start with the characters you typed, they will be displayed. Figure 7-19 shows that there is 1 subgroup that starts with “High.”

If you want to search for characters that might be in the middle of the name of the subgroup, type a % before the characters. Figure 7-20 shows that there are 6 subgroups with the letters “high” somewhere in their name.

Double-click any subgroup in the list to load that record in the main Conference Programmer window, behind the Subgroup Search window.

3. Click the Cancel button to close the Subgroup Search window.

Section 8: Reservation Calendar

8 Reservation Calendar

8.1 Viewing the Reservation Calendar

1. To open the Reservation Calendar, expand Room Assignments in the browse tree and click on Reservation Calendar. The Reservation Calendar window will open (Figure 8-1).

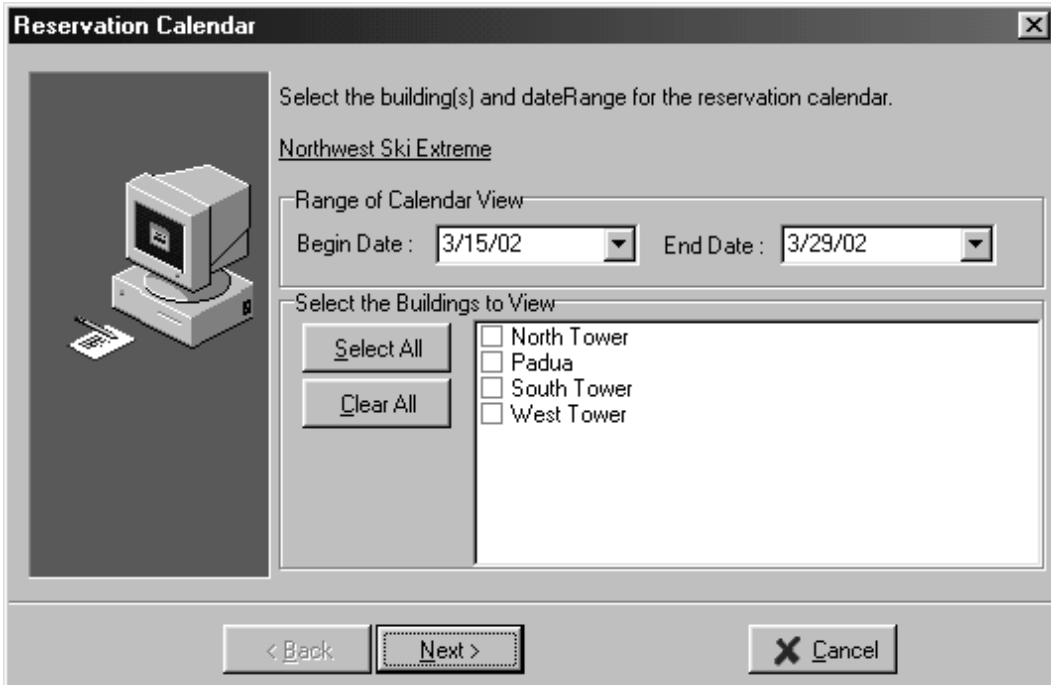


Figure 8-1

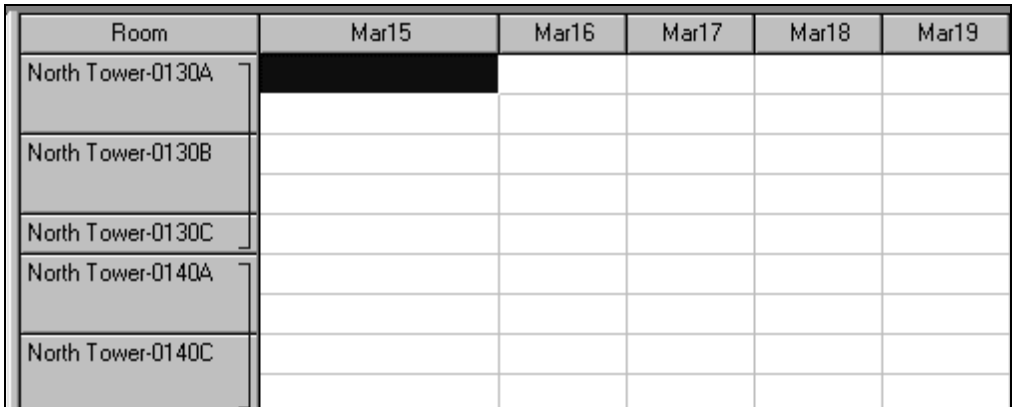
You will see the conference name you are working with - if this is not the conference you want to work with, click the Cancel button (then click the OK button to cancel the wizard), select the conference you want to work with, and open the Reservation Calendar again.

2. The Begin Date and End Date fields are automatically filled in for you with the the start date and end date of the conference you are working with. The End Date field contains either the end date of the conference or, if the conference is less than 14 days in length, the date 14 days after the start date of the conference. These dates do not affect the conference; they determine how many days you will view in the Reservation Calendar. You can change these dates.

Section 8: Reservation Calendar

For example, you may want the calendar to display a few days before the conference start date so you can see and work with early arrivals.

3. In the “Select the Buildings to View” area, select the buildings you want to block rooms in by checking the checkbox next to the buildings’ names. If you plan to work with all of your buildings at once, click the Select All button. In some cases it may be quicker to click the Select All button and uncheck the buildings you don’t want to see in the Reservation Calendar. If you have previously blocked rooms or made any room assignments in any buildings for this conference, those buildings will automatically be checked. If you uncheck a building that has room assignments or room blockings in it, the room assignments and blockings will remain, but you will not view them during this session in the Reservation Calendar.
4. Click the Next button. The Reservation Calendar will open (Figure 8-2).



Room	Mar15	Mar16	Mar17	Mar18	Mar19
North Tower-0130A					
North Tower-0130B					
North Tower-0130C					
North Tower-0140A					
North Tower-0140C					

The Reservation Calendar is similar to a spreadsheet, like Excel, but there are differences. The first row of information across the top of the Reservation Calendar contains the dates you selected - each column represents a night. The first column of information along the left of the Reservation Calendar is a list of all the rooms in the buildings you selected; in this example, rooms in the North Tower. The first room in the North Tower is 0130A. Notice how double rooms are displayed compared to single rooms - double rooms are taller than single rooms; double rooms have two cells while single rooms have one cell. Each cell represents a bed. The first single room, 0130C, is displayed with one cell.

Figure 8-2

Section 8: Reservation Calendar

The thin blue line to the right of the room numbers forms a group of rooms - a suite. The suites are defined in your buildings and rooms list, and are usually defined around bathroom sharing: all rooms sharing a bathroom could be considered a suite. It is often helpful to consider suites when blocking rooms or making room assignments. When Conference Programmer was first installed, Seattle Technology Group, Inc. installed your room inventory, including which rooms were to be grouped as suites. It is possible that your suites were not defined then, or that they have changed since then; the suites can be changed using the Buildings and Rooms setup function (see Section 17.5: Buildings and Rooms).

8.2 Blocking Rooms

“Blocking” rooms, or reserving them for a specific conference, is important in some situations. It is impossible to accidentally assign a blocked room to a participant in another conference. You will want to block rooms for a conference in order to prevent them from being blocked for or assigned to another conference. It is still possible to delete the blocking and then use the room for another conference, but that must be done manually, intentionally.

There are two methods to block rooms; you can highlight the beds to block, or you can manually enter the number of beds to block. Both methods are useful in different situations.

Highlight to Block

1. Locate the rooms you wish to block by scrolling up or down in the Reservation Calendar. There may be another group or construction happening on the first floor, so you might scroll to the second floor to block rooms for this conference.

Click in the first cell of the first room you want to block. Holding the mouse button down, drag the mouse down, highlighting rooms as you go. While dragging up or down, notice the number in the status bar called “Selected:” - this indicates the number of beds you currently have selected.

There is no need to scroll to the right to highlight the beds you want on each of the days the group plans to stay. Conference Programmer will ignore the dates you highlight in the Reservation Calendar and automatically block dates based on the conference check-in and check-out dates. The only important thing to highlight are the beds in the correct rooms.

Section 8: Reservation Calendar

When you have highlighted all the beds you want to block, release the mouse button.

- Click the Block button on the toolbar, or right-click anywhere in the window and select Block. The Assign Participants window will open (Figure 8-3).

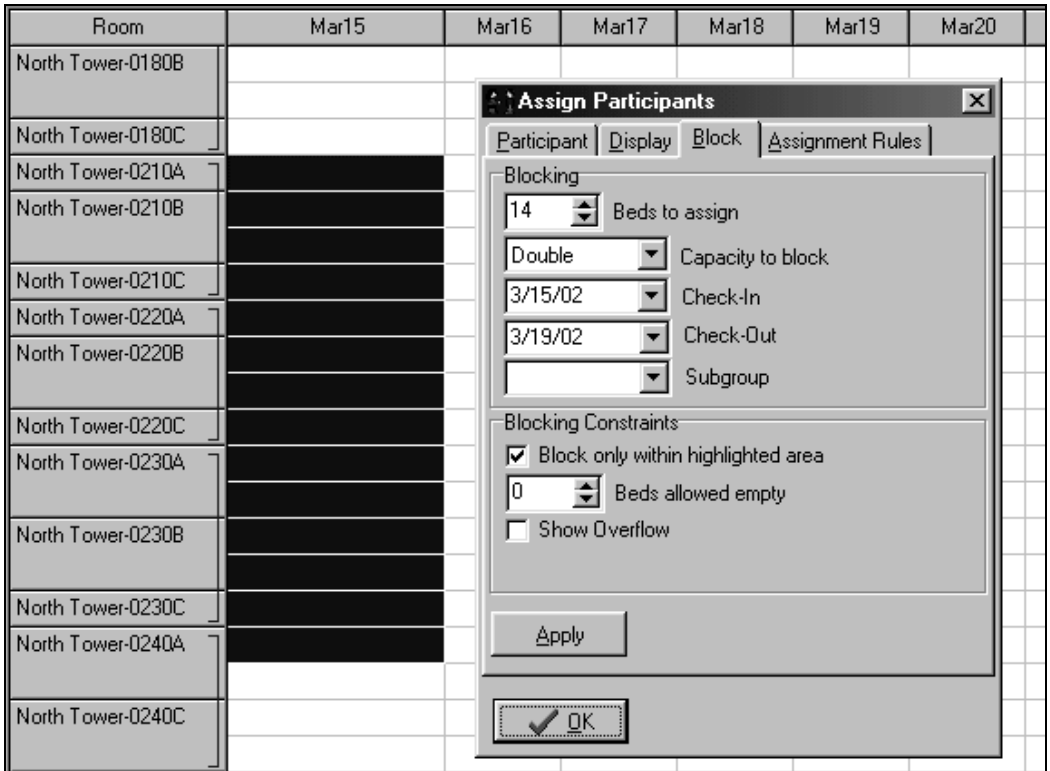


Figure 8-3

- Make changes in this window if necessary.

The Beds to Assign field is automatically filled with the number of beds you highlighted.

The Capacity to Block field is automatically filled with "Double." By choosing Double, only the double rooms in the highlighted area will be blocked. In this example, although 14 beds are selected only eight beds (four double rooms) will be blocked. If you change the Capacity to Block field to "Single," only five single rooms will be blocked. Notice that the last bed in the highlighted area is one bed in a double room - thus it cannot be blocked as a double, nor as a single.

Section 8: Reservation Calendar

The Check-In and Check-Out fields are automatically filled in with the check-in and check-out dates of the conference. You can change these dates to accommodate early or late arrivals or departures (see Section 8.3: Blocking Early and Late Arrivals and Departures).

The Subgroup field allows you to block rooms specifically for a subgroup. “No Subgroup” is automatically selected, but you can select another subgroup to block rooms for by clicking the ellipsis button (the button with 3 dots), then clicking on the desired subgroup, then clicking the OK button. Selecting “No Subgroup” will block rooms for anyone in the conference and not for one specific subgroup (see Section 8.6: Blocking Rooms For Subgroups).

The Blocking Constraints area provides rules to allow for different types of room blockings. In this example we want to block rooms only within the beds we have highlighted, so we need to make sure that the “Block only within highlighted area” checkbox is checked. Unchecking this feature is explained in the next example.

In this example, the Beds Allowed Empty field will remain 0 (zero). Only change this if you choose to block rooms with fewer beds than the room has. For example, suppose you want to block double rooms as singles -

The screenshot displays a reservation calendar grid with columns for dates from Mar15 to Mar20 and rows for various room types (e.g., North Tower-0180B, North Tower-0210A, North Tower-0210B, North Tower-0210C, North Tower-0230B, North Tower-0230C, North Tower-0240A, North Tower-0240C). Several cells in the grid are shaded black, indicating blocked rooms. An 'Assign Participants' dialog box is open, showing the 'Block' tab. The 'Blocking' section includes a 'Beds to assign' field set to 14, a 'Capacity to block' dropdown set to 'Double', and checkboxes for 'Check-In', 'Check-Out', and 'Subgroup'. The 'Blocking Constraints' section has a checked checkbox for 'Block only within highlighted area' and an unchecked checkbox for 'Beds allowed empty'. An 'Information' dialog box is also open, displaying the message: 'You blocked 5 rooms with 10 participants.' and an 'OK' button.

Figure 8-4

Section 8: Reservation Calendar

the Beds Allowed Empty field would be set to 1 (see Section 8.4: Blocking Doubles As Singles).

In some situations you may need a room made up to handle one more guest than the room has beds. If a room has been marked as an Overflow room (see Section 9.2: Making Rooms Assignments With the Reservation Calendar) and the Show Overflow field is checked, the room will appear in the Reservation Calendar with the increased capacity.

4. When you have your room blocking settings correct, click the Apply button. The Information window displays the results Conference Programmer successfully blocked (Figure 8-4). In this example, we blocked 5 rooms with 10 beds. Click the OK button.
5. The double rooms are blocked, all the beds are still highlighted in the Reservation Calendar, and the Assign Participants window remains open. To block the single rooms as well, change the Capacity to Block field to "Single" and click the Apply button again (Figure 8-5).

Notice that the highlighted double rooms that were already blocked to not get blocked again. Not only did we tell Conference Programmer to block only the single rooms this time (so it ignored the double rooms), but if we told Conference Programmer to block double rooms again, it would ignore already-blocked rooms - a bed cannot be blocked more than once for a given night.

In this example, both double rooms and single rooms are blocked for the Northwest Ski Extreme conference (Figure 8-6).

Note: There is a disadvantage using this method to block rooms. Suppose you want to block 140 beds in double rooms only. When you highlight beds the status bar tells you how many beds are highlighted, but it does not tell you how many of those beds are in singles or in doubles. If you have 140 beds highlighted and some are in single rooms and some are in double rooms, you have not highlighted enough beds to block 140 beds in double rooms only.

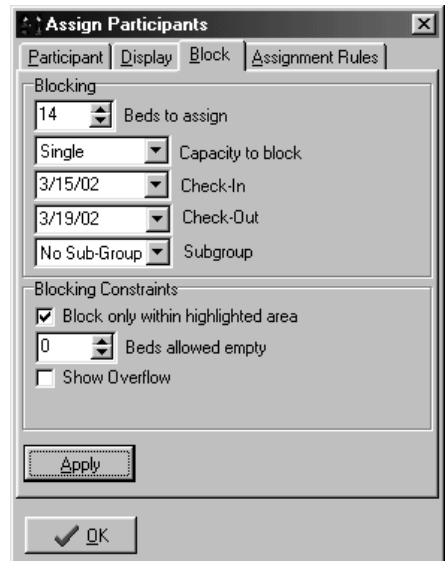


Figure 8-5

Section 8: Reservation Calendar

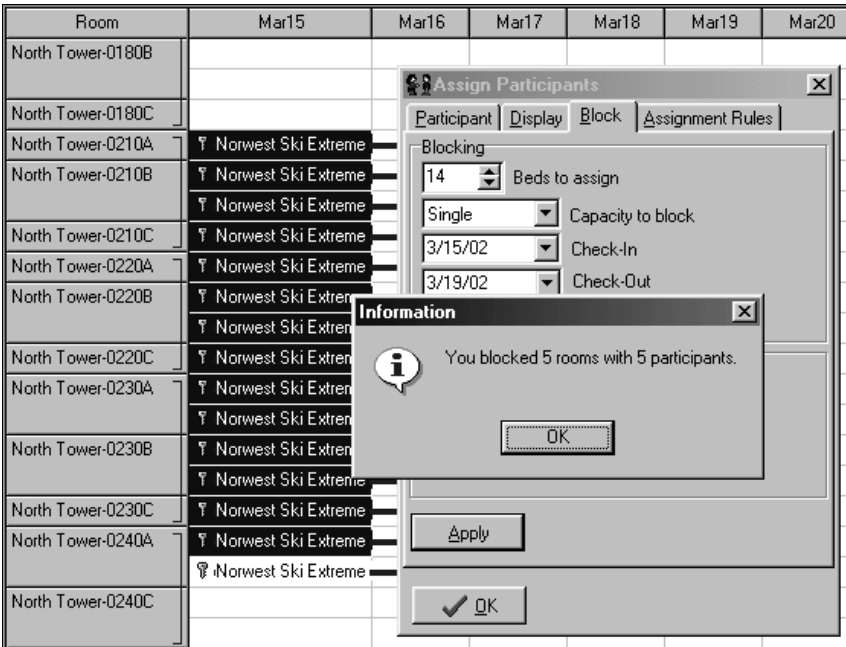


Figure 8-6

If you click the Apply button anyway, Conference Programmer will tell you how many beds in double rooms it could block. Then you can highlight more beds and block again until you have your total. You could avoid this redundancy by manually entering the number of beds to block.

Manual Room Blocking

1. Using the scroll bar to the right of the Reservation Calendar, locate the first room room you want to block. Click in the first cell of that room. Figure 8-7 shows that we clicked on the first cell of double room 0160B in North Tower.

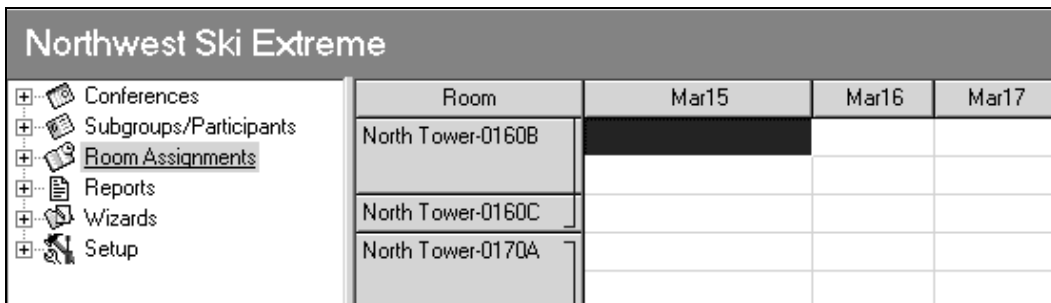


Figure 8-7

Section 8: Reservation Calendar

2. Click the Block button on the toolbar, or right-click anywhere in the window and select Block. The Blocking Option window will open (Figure 8-8).
3. In the Beds to Assign field, enter the number of beds you want to block. In this example, we plan to block 140 Doubles.
4. Since we did not highlight the number of beds to block, we have unchecked the "Block only with highlighted area" checkbox.
5. Click the Apply button, and the exact number of beds in double rooms are blocked, unless there are not that many beds available in the buildings you have selected (Figure 8-9). In either case, Conference Programmer will inform you how many beds it successfully blocked.

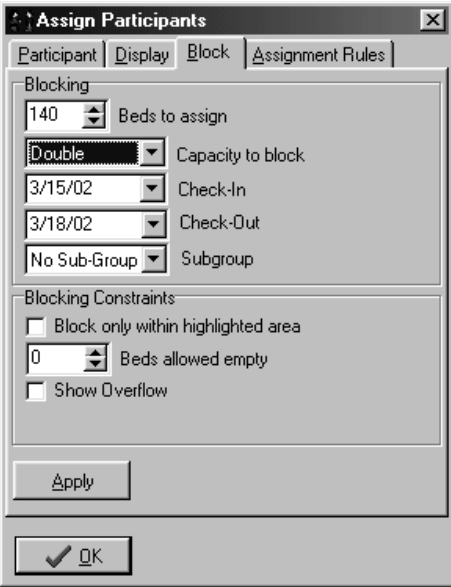


Figure 8-8

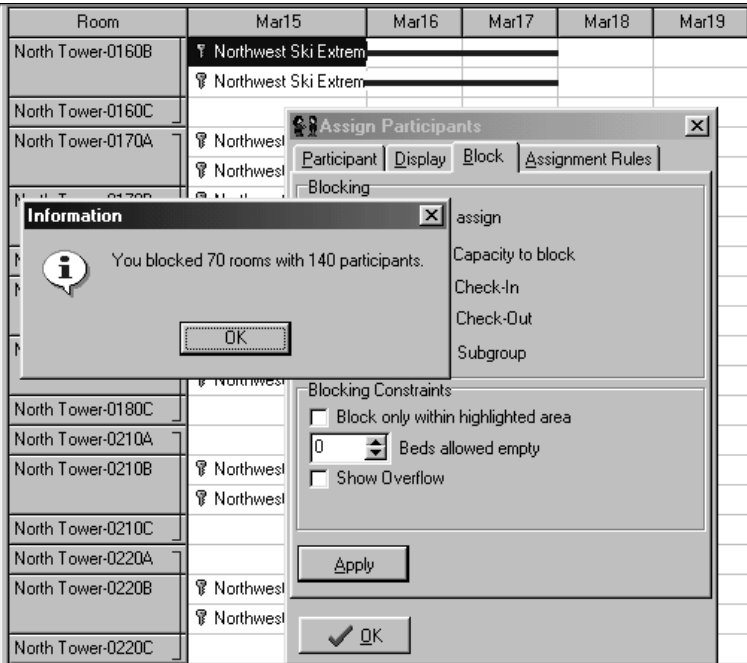


Figure 8-9

Section 8: Reservation Calendar

- Click the OK button in the Information window, then click the OK button in the Assign Participants window. Notice that when you clicked the Apply button in the Assign Participants window, you would block rooms but the window would stay open so you could easily continue blocking. The OK button in this window merely closes the window - it does not block any rooms.

8.3 Blocking Early and Late Arrivals and Departures

In the Reservation Calendar, with the Assign Participants window open, set the Check-In field to your early or late arrival date and set the Check-Out field to your early or late departure date. When you click the Apply button, the beds will be blocked for the dates you set.

8.4 Blocking Doubles As Singles

You can block rooms with a greater capacity as though they had a smaller capacity. For example, you can block double rooms as singles, or quad rooms as doubles. In this example we will block double rooms as singles.

- In the Reservation Calendar, with the Assign Participants window open, set the Capacity to Block field to "Single".

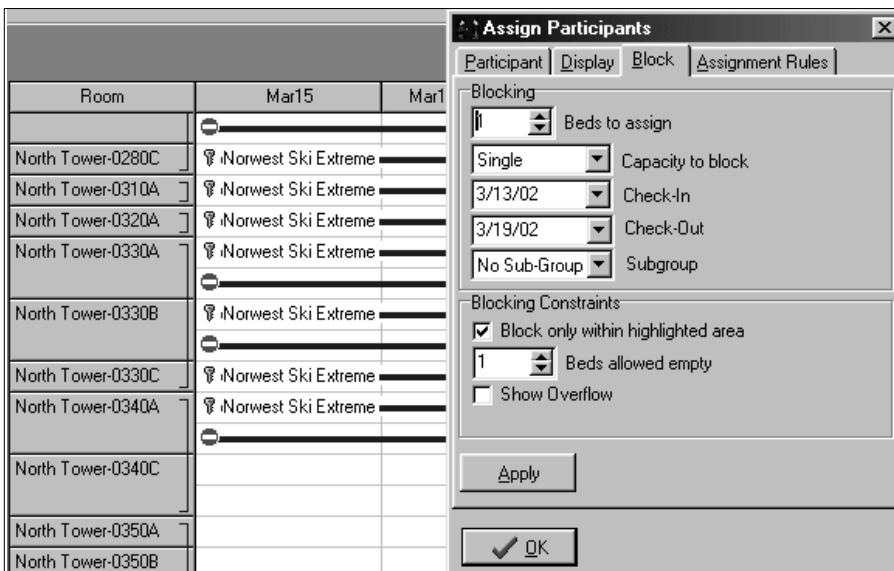


Figure 8-10

Section 8: Reservation Calendar

2. Set the Beds Allowed Empty field to 1. Assuming you have highlighted some beds or typed a number in the Beds to Assign field when you click the Apply button, one bed in each of the double rooms will be blocked and the other bed will be marked as unavailable, which is indicated by the red circle and blue line (Figure 8-10).

8.5 Multiple Date Room Blocking

A conference or subgroup may plan to check in for a period of time, leave for a day or two, and then return. A multiple date blocking is required. This is identical to other room blockings, but adds another step for each set of dates you need to block.

1. Block beds with the first set of dates. In this example, we blocked beds for the John Zankich Basketball Camp from July 9 through July 12. They check out on the day of July 12, so the Reservation Calendar shows them as occupying the beds on the nights of July 9, July 10, and July 11 (Figure 8-11).

Room	Jul9	Jul10	Jul11	Jul12	Jul13
South Tower-0130A	John Zankich Basketball Camp				
	John Zankich Basketball Camp				
South Tower-0130B	John Zankich Basketball Camp				
	John Zankich Basketball Camp				
South Tower-0130C					
South Tower-0140A	John Zankich Basketball Camp				
	John Zankich Basketball Camp				
South Tower-0140C	John Zankich Basketball Camp				
	John Zankich Basketball Camp				

Figure 8-11

2. In the Reservation Calendar, with the Assign Participants window open, change the Check-In and Check-Out fields to the next set of dates to block. In this example, the conference plans to check-out on July 12 but return on July 14 and check-out again on July 16 (Figure 8-12).

Section 8: Reservation Calendar

Room	Jul9	Jul10	Jul11	Jul12	Jul13	Jul14
South Tower-0130A	John Zankich Basketball					
South Tower-0130B	John Zankich Basketball					
South Tower-0130C	John Zankich					
South Tower-0140A	John Zankich					
South Tower-0140C	John Zankich					
South Tower-0150A	John Zankich					
South Tower-0150B	John Zankich					
South Tower-0160A	John Zankich					
South Tower-0160B	John Zankich					
South Tower-0160C	John Zankich					
South Tower-0170A						
South Tower-0170B						
South Tower-0170C						

Figure 8-12

Figure 8-13 shows that the beds have been blocked for both sets of dates.

Room	Jul9	Jul10	Jul11	Jul12	Jul13	Jul14	Jul15	Jul16
South Tower-0130A	John Zankich Basketball					John Zankich Basketball		
South Tower-0130B	John Zankich Basketball					John Zankich Basketball		
South Tower-0130C	John Zankich Basketball					John Zankich Basketball		
South Tower-0140A	John Zankich Basketball					John Zankich Basketball		
South Tower-0140C	John Zankich Basketball					John Zankich Basketball		

Figure 8-13

8.6 Blocking Rooms For Subgroups

Subgroups must be defined before you can block rooms for them (see Section 7.1: Creating a Subgroup). Blocking rooms for subgroups is very useful because some groups may request space near each other, or because you may want to be sure to keep certain groups together.

1. In the Reservation Calendar, with the Assign Participants window open, select the subgroup you want to block rooms for by clicking the ellipsis button (the button with 3 dots) in the Subgroup field, then clicking on the desired subgroup, then clicking the OK button (Figure 8-14).

Section 8: Reservation Calendar

- Click the Apply button to block beds for that subgroup. Figure 8-15 shows that we have blocked rooms for three different subgroups of the Northwest Ski Extreme conference.

Room	Mar15	Mar16	Mar17	Mar18
North Tower-0160B	Crystal Mountain/Northwest Ski Extreme Crystal Mountain/Northwest Ski Extreme			
North Tower-0160C				
North Tower-0170A	Crystal Mountain/Northwest Ski Extreme			
North Tower-0170B	Crystal Mountain/Northwest Ski Extreme Crystal Mountain/Northwest Ski Extreme			
North Tower-0170C				
North Tower-0180A	Crystal Mountain/Northwest Ski Extreme Crystal Mountain/Northwest Ski Extreme			
North Tower-0180B	Mission Ridge/Northwest Ski Extreme Mission Ridge/Northwest Ski Extreme			
North Tower-0180C				
North Tower-0210A				
North Tower-0210B	Mission Ridge/Northwest Ski Extreme Mission Ridge/Northwest Ski Extreme			
North Tower-0210C				
North Tower-0220A				
North Tower-0220B	Wistler\Blackcomb/Northwest Ski Extreme Wistler\Blackcomb/Northwest Ski Extreme			
North Tower-0220C				
North Tower-0230A	Wistler\Blackcomb/Northwest Ski Extreme Wistler\Blackcomb/Northwest Ski Extreme			

Figure 8-15

View the Reservation Calendar in Participant, Conference, or Subgroup Mode

The Reservation Calendar shows the name of the participant in each bed on the first night of the stay. The participant's gender is shown in parentheses, and a blue horizontal line shows which nights that participant is staying in that bed. If a participant is not yet assigned to a room but that room is blocked, the conference name is displayed instead.

Conference Programmer can display the conference name or the subgroup name instead of the participant name. To switch views, click the View button on the toolbar and select the view you want: Participant, Conference, or Subgroup.

If you are viewing the Reservation Calendar in subgroup mode, the blocked beds display the subgroup name and the conference name. If a participant has been assigned to a bed, the subgroup name, the participant name, and the participant's gender is displayed.

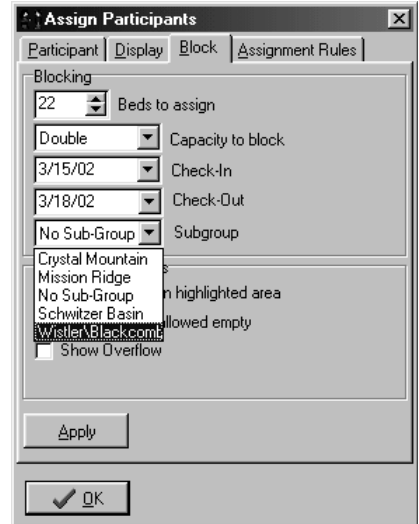


Figure 8-14

Section 8: Reservation Calendar

If you are viewing the Reservation Calendar in conference mode, only the conference name is displayed for all blocked and assigned rooms.

Leaving the Reservation Calendar

If you block beds and assign participants to rooms and delete extra room blockings and exchange roommates, all in the Reservation Calendar, you might make a mistake. Or perhaps you are simply moving blockings and participants around to see what it will look like. If you want to leave the Reservation Calendar and work in some other area of Conference Programmer but do not want to save the changes you have made, click the Cancel button on the toolbar. The Reservation Calendar will close and will not save the changes, and a blank screen will appear. You can then re-enter the Reservation Calendar, or move to another area of Conference Programmer.

If you do want to save the changes you have made, you can click the Save and Exit button on the toolbar - your changes will be saved and the Reservation Calendar will close, and a blank screen will appear

If you are doing some complex room blocking or assignments, you may want to save your work in stages. Perhaps you perform a large complex room blocking, and then you have to assign a long list of participants to rooms with specific roommates. You can click the Save button on the toolbar to save all changes you have made in the Reservation Calendar so far, and then continue to work in the Reservation Calendar. This is convenient because if you complete the complex bed blocking successfully and you save your changes, you will not have to re-do that bed blocking if you make a mistake on the complex room assignment portion and have to cancel that portion of your work.

8.7 Sorting the Rooms in the Reservation Calendar

By default, the Reservation Calendar will list all the rooms in the buildings you have selected, in the order they are supposed to be listed (as determined by the Sort field; see Section 17.5: Buildings and Rooms). To make your blocking or assigning easier, you can sort the rooms a number of ways.

1. In the Reservation Calendar, click the Action button on the toolbar, then click the Rules and Room Sort tab (Figure 8-16).

Section 8: Reservation Calendar

2. In the Room Sorting Options area, select the order you want the rooms to list in. In this example, we have selected Room Capacity.

The rooms will rearrange to the new order - you do not need to click the OK button. If you click the OK button, the window will close.

If you have selected multiple buildings, they will always display in the same order: Alphabetically by building code. But within each building the rooms will be sorted according to your choice.



Figure 8-16

“Room Capacity” lists all rooms with a capacity of 1 (“Singles”) first, then lists all rooms with a capacity of 2 (“Doubles”), etc. “Room Type” lists all “Doubles” then lists all Singles, because “Doubles” is alphabetically before “Singles.”

8.8 Printing the Reservation Calendar

You cannot print the Reservation Calendar, but there is a Monthly Calendar View, which more closely resembles a visual planning calendar.

1. In the browse tree, expand Room Assignments and click Monthly Calendar View. The Monthly Calendar View window will open (Figure 8-17).

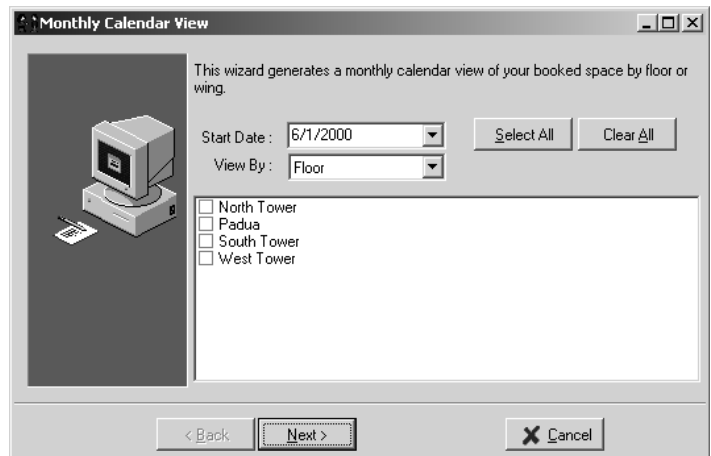


Figure 8-17

Section 8: Reservation Calendar

2. In the Start Date field, select the first date of the 1-month period of the Reservation Calendar that you want to print.

In the View By field, select whether you want to group your calendar by floor or by wing.

Check the checkbox next to each building you want displayed in the calendar. You can check all or none of the checkboxes by clicking the Select All or Clear All buttons, respectively.

3. Click the Next button. The wizard asks if you want to Preview or Print the calendar (Figure 8-18). In this example, we will preview the calendar on the computer screen.

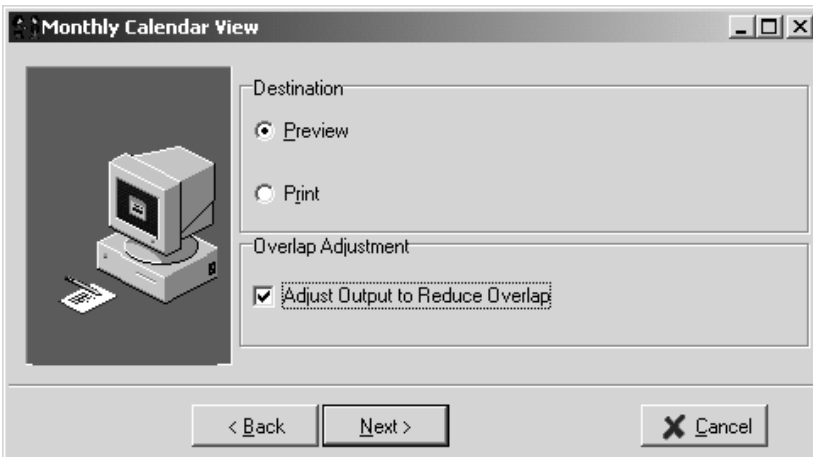


Figure 8-18

Leave the “Adjust Output to Reduce Overlap” checkbox checked. If more than one conference is using rooms on any given floor or wing, leaving this checkbox checked will make the calendar easier to view; it will put each conference on a new line, instead of displaying the conferences overlapping each other on one line.

4. Click the Next button. The wizard displays the calendar with your selected criteria (Figure 8-19). Each group will display in a different color. Figure 8-19 shows that the Bankers Associations conference is staying in the South Tower on Floors 1, 2, and 3 from June 7, 2000 through June 9, 2000.

Section 8: Reservation Calendar

The number in parentheses next to the building name and floor number is the maximum capacity that floor has, in beds. The number in parentheses next to the conference name is the number of beds that the conference is using on that floor.

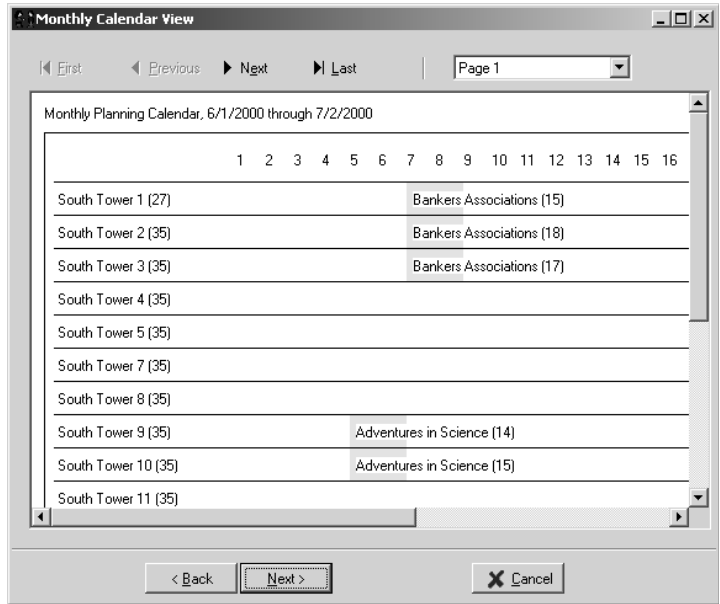


Figure 8-19

You can resize the window to see more of the calendar. If the calendar is too large to fit on one screen, you can navigate through the pages of the calendar by clicking the First, Previous, Next, and Last buttons on the top of the window (Figure 8-20). Clicking the Next button on the bottom of the window closes the Monthly Calendar View wizard!

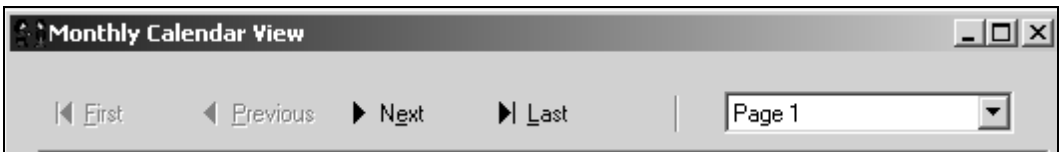


Figure 8-20

5. Click the Next button to close the Monthly Calendar View.

Section 9: Room Assignments

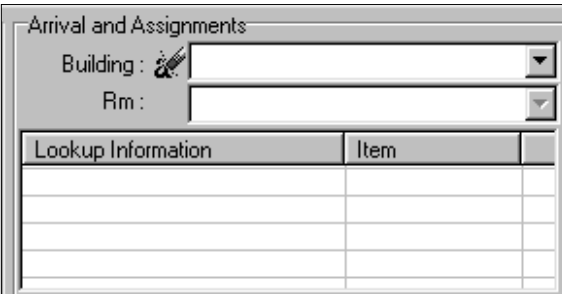
9 Room Assignments

There are five methods to make room assignments. The Arrival and Assignments section is accessed from the Participants General tab; this method does minimal error checking. The Reservation Calendar is the easiest and most visual way of assigning participants to rooms, and the best way to assign multiple participants very quickly. Find/Assign Vacant Room is for assigning a single participant to an unoccupied, clean room - much like a hotel might. The Find/Assign Blocked Room method is also for assigning a single participant, but allows you to easily select only the rooms that have been pre-blocked for the conference that the participant is in. The Batch Assignments wizard makes it easy to assign participants to pre-blocked rooms if the participants are already entered in Conference Programmer.

9.1 Making Room Assignments From the Participant's Record

This method of assigning a participant to a room is used primarily when you know exactly which room you want, and do not need to use special tools to help you determine which room to assign.

1. In the browse tree, expand Subgroups/Participants, click on the name of the Participant you want to assign to a room, and click the General tab.



The screenshot shows a window titled "Arrival and Assignments". At the top, there is a "Building:" label followed by a dropdown menu and a pencil icon. Below that is an "Rm:" label followed by another dropdown menu. At the bottom, there is a table with two columns: "Lookup Information" and "Item". The table is currently empty.

Figure 9-1

2. Select a building in the Building field on the right side of the General tab in the Arrival and Assignments section (Figure 9-1).
3. The Rm field drop-down menu will list all the rooms in the selected building. Select the room you want to assign the participant to.

4. Click the Post button on the toolbar.

Overbooking a Room

Occasionally you may want to overbook a room. In this example, John Doe wants to share a double room with Jim and Bob Doe. When you post

Section 9: Room Assignments

the room assignment for John Doe, who is the third participant in a double room, you will receive a confirmation message (Figure 9-2).

This window warns you that someone else is occupying this room. Click the OK button to make the room assignment, overbooking three people into a double room, or click the Cancel button to go back and select another room. You will receive this message even if the participants in the room are attending a different conference.

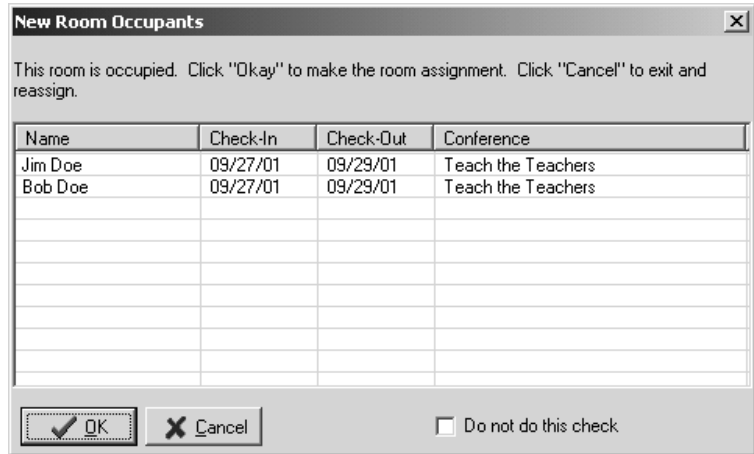


Figure 9-2

To avoid receiving this warning message for future assignments, check the “Do not do this check” checkbox. You can also toggle this warning message by clicking the Procedures button on the toolbar (you must be viewing a Participant’s General tab first), then checking or unchecking the “Check room occupants before posting” item.

9.2 Making Room Assignments With the Reservation Calendar

Using Drag-and-Drop to Make Room Assignments

The Reservation Calendar is the most comprehensive, yet the easiest, method to make room assignments. It displays the rooms in a spreadsheet-like calendar, and shows a list of participants not assigned to rooms, and allows you to simply drag a name to a room to make an assignment. It can also prevent participants with different genders from being assigned to the same room, and can prevent participants in different conferences from being assigned to the same room.

Before you can use drag-and-drop to assign rooms, participants must be entered in Conference Programmer and they should have a room type selected (the Room Type field in the Additional Info tab should have a value-

Section 9: Room Assignments

- this is usually accomplished by the Service Template when participants are entered; see Section 4: Service Template). It may also ease your assignment process to have rooms pre-blocked for the conference.

1. In the browse tree, expand Room Assignments and click Reservation Calendar. Select the appropriate buildings and enter the appropriate dates and click the Next button. To display the list of participants needing room assignments, click the Action button on the toolbar. The Assign Participants window will open (Figure 9-3).

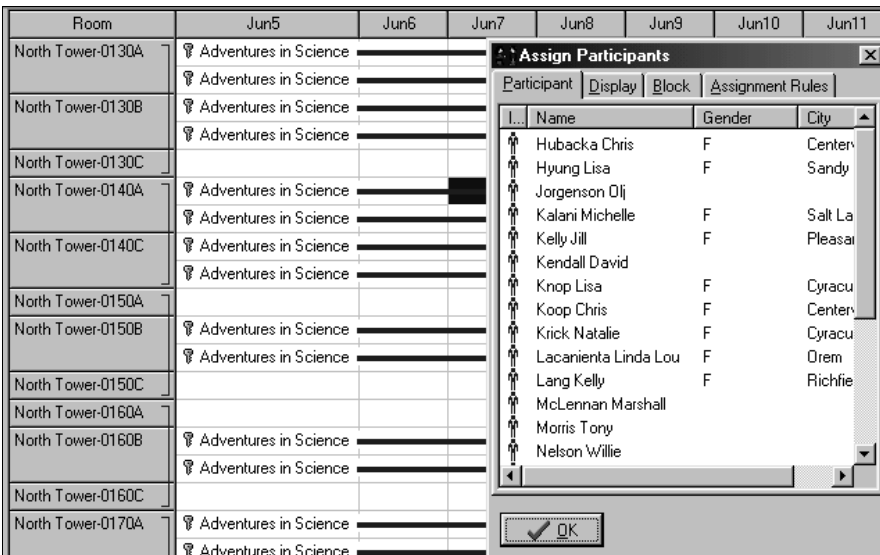


Figure 9-3

You can resize and move the Assign Participants dialog box so that you can see enough of the Reservation Calendar in the background to work with.

2. Locate the participant(s) to assign to the first room. In this example, the first room is 0130A in the North Tower building, and Lisa Knop and Kelly Lang wish to share this room.

Click the first participant (Lisa Knop) in the list of participants, then press and hold the Control key on the keyboard and click the second participant (Kelly Lang), then release the Control key on the keyboard. Figure 9-4 shows the Assign Participants dialog box with these two participants selected.

3. Click on one of the participants, hold the mouse button down, and drag the mouse over the correct room blocking. Notice your cursor changes to an arrow and a square. Place the tip of the arrow in the

Section 9: Room Assignments

first cell (the first bed) of the appropriate room blocking (in this example, the room blocking for the Adventures in Science conference for room 0130A) and release the mouse button. If you do not have beds pre-blocked for this conference, place the tip of the arrow in the first cell (the first bed) adjacent to the appropriate room number and release the mouse button. Do not drag the participants to the first gray column with room number information (such as "North Tower-0130A") - this will not assign the participants!

Room	Jun5	Jun6	Jun7
North Tower-0130A	♀ Chris Koop (F) ██████████		
	♀ Kelly Lang (F) ██████████		
North Tower-0130B	🔒 Adventures in Science ██████████		
	🔒 Adventures in Science ██████████		
North Tower-0130C			
North Tower-0140A	🔒 Adventures in Science ██████████		
	🔒 Adventures in Science ██████████		

Figure 9-5

The selected participants are now assigned to the room (Figure 9-5). Notice that these participants are also removed from the Assign Participants dialog box participant list - they are no longer unassigned participants.

Using Drag-and-Drop With No Roommate Preference

Suppose the participants have no preference for roommates. You may assign the entire list of participants, no matter how many there are, with one action.

1. Click the first participant in the list in the Assign Participants window, then scroll the list down to the last participant.
2. Hold the Shift key on the keyboard down and click the last participant on the list. All participants on the list between the two names you clicked (in this example, the first and last participants) will be highlighted. Release Shift key on the keyboard.

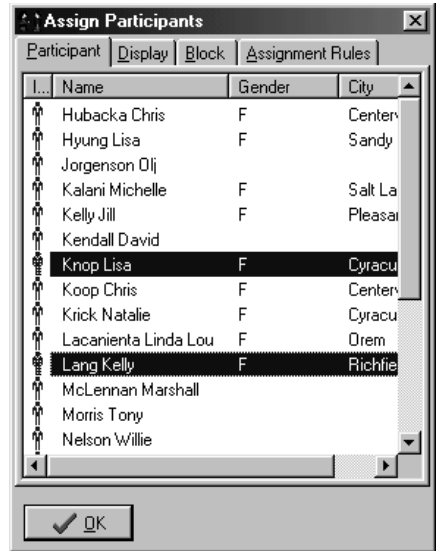


Figure 9-4

Section 9: Room Assignments

3. Click on one of the participants, hold the mouse button down, and drag the mouse over the first room blocking you want to assign. Each participant selected will be assigned to a bed, starting from the first bed you dragged the mouse to, going down the list of beds in the Reservation Calendar until there are no more beds. The participants will be assigned to rooms in the order the participants are listed in the Assign Participants window. Changing the order the participants are listed here is described in the next section. Once each participant is assigned a room, their name is removed from the participant list in the Assign Participants window.

You may receive a warning for one or more of your participants (Figure 9-6). Click the Cancel button to place participants only in rooms that correspond with their specific room type. In this example, all participants have room type of Double. If you click the Cancel button, they will only be placed in double rooms. If some of the participants have a room type of Single, those participants will be placed into single rooms if any are available.

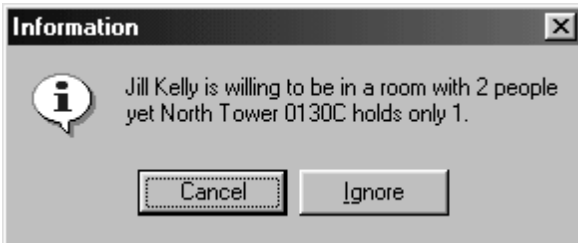


Figure 9-6

Click the Ignore button to assign participants to the room regardless of the participant's room type. This is sometimes used as a method to utilize all bed space.

Room Assignments For Subgroups

Once you have blocked beds for subgroups and entered participants and assigned them to subgroups, making room assignments is very simple.

1. In the browse tree, expand Room Assignments and click Reservation Calendar. Select the appropriate buildings and enter the appropriate dates and click the Next button. Click the View button on the toolbar and select Subgroup. The Reservation Calendar displays the subgroup and conference name for all room blockings (Figure 9-7).
2. To display the list of participants needing room assignments, click the Action button on the toolbar. The Assign Participants window will open (Figure 9-8).

Section 9: Room Assignments

Room	Mar15	Mar16	Mar17
South Tower-0310A			
South Tower-0310B	Crystal Mountain/Northwest Ski Extreme		
	Crystal Mountain/Northwest Ski Extreme		
South Tower-0310C			
South Tower-0320A			
South Tower-0320B	Crystal Mountain/Northwest Ski Extreme		
	Crystal Mountain/Northwest Ski Extreme		
South Tower-0320C			
South Tower-0330A	Crystal Mountain/Northwest Ski Extreme		
	Crystal Mountain/Northwest Ski Extreme		
South Tower-0330B	Crystal Mountain/Northwest Ski Extreme		
	Crystal Mountain/Northwest Ski Extreme		
South Tower-0330C			
South Tower-0340A	Mission Ridge/Northwest Ski Extreme		
	Mission Ridge/Northwest Ski Extreme		
South Tower-0340C	Mission Ridge/Northwest Ski Extreme		
	Mission Ridge/Northwest Ski Extreme		

Figure 9-7

Room	Mar15	Mar16	Mar17	Mar18	Mar19
South Tower-0310A					
South Tower-0310B	Crystal Mountain/Northwest Ski Extreme				
	Crystal Mountain/Northwest Ski Extreme				
South Tower-0310C					
South Tower-0320A					
South Tower-0320B	Crystal Mountain/Northwest Ski Extreme				
	Crystal Mountain/Northwest Ski Extreme				
South Tower-0320C					
South Tower-0330A	Crystal Mountain/Northwest Ski Extreme				
	Crystal Mountain/Northwest Ski Extreme				
South Tower-0330B	Crystal Mountain/Northwest Ski Extreme				
	Crystal Mountain/Northwest Ski Extreme				
South Tower-0330C					
South Tower-0340A	Mission Ridge/Northwest Ski Extreme				
	Mission Ridge/Northwest Ski Extreme				
South Tower-0340C	Mission Ridge/Northwest Ski Extreme				
	Mission Ridge/Northwest Ski Extreme				
South Tower-0350A					
South Tower-0350B	Mission Ridge/Northwest Ski Extreme				
	Mission Ridge/Northwest Ski Extreme				

Assign Participants

Participant | Display | Block | Assignment Rules

Name	Gender	City
Aurthor Morris	M	Be
Baumgart Jim	M	
Benz Gary	M	
Benz Patti	F	
Berg Debbie	F	
Bloch Leslie	F	
Evich Tom	M	
Galligan Mike	M	
McGown Bill	M	
McGown Carolyn	F	
Mischaikov Angela	F	
Mischaikov Theodore P	M	
Prescot Jenny	F	
Schloss Gary	M	

OK

Figure 9-8

This list is not currently very helpful - it does not show us which subgroup each participant is in. We need to sort this list by Subgroups.

- Click the Display tab in the Assign Participants window. A list of all possible fields is displayed, with a check mark next to those fields we want to show up in the participant list. Scroll through the list to find the Subgroup field and check its checkbox. Next, click the name of the field ("Subgroup"), hold the mouse button down, and drag it to the top of the list (Figure 9-9). The order in which the

Section 9: Room Assignments

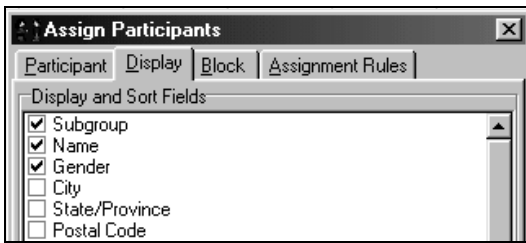


Figure 9-9

fields are listed here is the order in which your participants will be listed in the unassigned participant list. You may need to drag the field as far up the list as you can see, release the mouse button and scroll the list higher, then drag the field again.

Using this functionality, you can sort the list of unassigned participants by any field. For example, you can sort by gender, then by room type, then last name, then first name. The list would first show all females who had a Room Type value of Double, in alphabetical order by last name then by first name; then it would show all females who wanted Singles, then all males who wanted Doubles, then all males who wanted Singles.

4. Click the Participant tab in the Assign Participant window. Do not click the OK button, or the window will close.
5. In this example, the participant list now sorts the participants by their subgroup (Figure 9-10). It also displays their name and gender. Select all participants in a subgroup by clicking on the first participant in that subgroup, holding the Shift key on the keyboard down, clicking on the last participant in that subgroup, and releasing the Shift key. You can then Drag-and-drop the selected participants into the rooms that have been blocked for that subgroup.

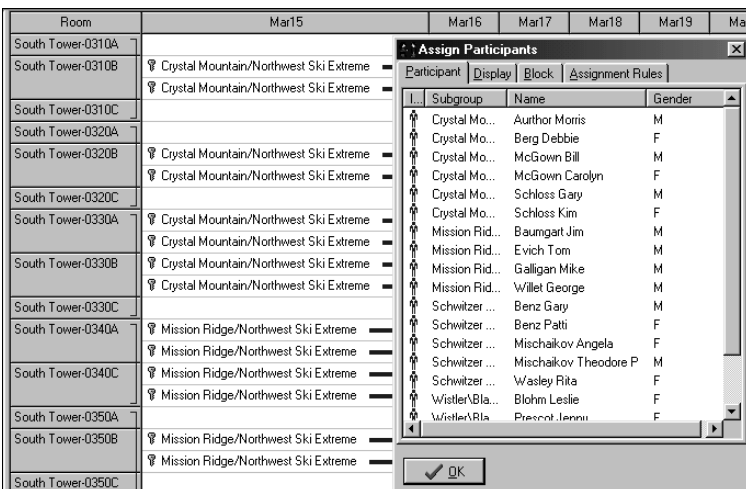


Figure 9-10

Section 9: Room Assignments

Room Assignment Rules and Options

To make multiple room assignments easy in even trickier situations, you may restrict room assignments based upon certain conditions. With the Assign Participants window open, click the Assignment Rules tab (Figure 9-11).

Select the conditions you would like to prohibit when making rooms assignments. Check the “Roommates are in different conferences” checkbox to prevent participants in different conferences from being assigned the same room. Check the “Roommates have different genders” checkbox to prevent participants with different genders from being assigned the same room.

It is a good habit to review the Assignment Rules before making any room assignments.

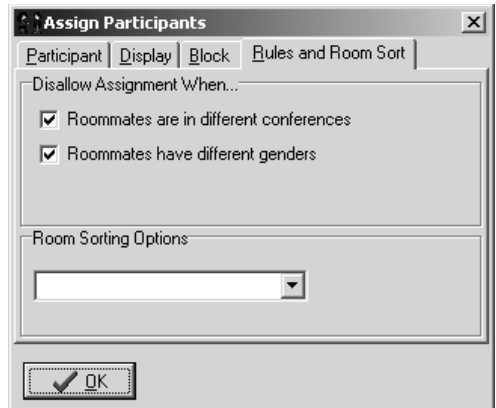


Figure 9-11

Overflow Rooms

If a room is configured as an overflow room, you can assign more participants into it than the room's capacity while in the Reservation Calendar. If a room is not an overflow room, you can still assign more participants to it than its capacity, but only from the Participants General tab, not with the drag-and-drop ease of the Reservation Calendar. For example, you may want to assign three participants into one double room. To block and assign participants into overflow rooms from the Reservation Calendar, you must first configure the rooms as overflow rooms.

Designating Rooms As Overflow

1. In the browse tree, expand Setup and click Buildings and Rooms.
2. Select the building that contains the rooms you want to configure for overflow (Figure 9-12).

Notice Room No. 0130A and 0130B both have the Overflow column set to 1. Each of these rooms can be used as a triple (capacity of 2 plus overflow of 1) in overflow situations. Room 0130C has the Overflow column set to 1 as well, but is a single room - this room may be used as a double in overflow situations.

Section 9: Room Assignments

Room No.	Sort Field	Telephone	Capacity	Overflow	Room Type	Room Sty
0130A	1	7016	2	1	Double	
0130B	2	7016	2	1	Double	
0130C	3	7016	1	1	Single	
0140A	4	7017	2	0	Double	
0140C	5	7017	2	0	Double	
0150A	6	7018	1	0	Single	

Figure 9-12

3. Enter the overflow number for each room (see Section 17.5: Buildings and Rooms). For example, if you set the Overflow field to 3, a double room would become a five-person room in overflow situations. Click the OK button to close the Buildings and Rooms window.

Blocking Rooms As Overflow

Participant | Display | Block | Assignment Rules

Blocking

1 Beds to assign

Double Capacity to block

03/15/02 Check-In

03/18/02 Check-Out

Wistler\Blackc Subgroup

Blocking Constraints

Block only within highlighted area

0 Beds allowed empty

Show Overflow

Apply

OK

Figure 9-13

1. In the Reservation Calendar, click the Block button on the toolbar, or right-click anywhere in the window and select Block. The Assign Participants window appears and the Block tab is already displayed for you (Figure 9-13). If you already have the Assign Participant window open, simply click on the Block tab.
2. Check the “Show Overflow” checkbox. Notice that all rooms designated as overflow now appear in the Reservation Calendar with their increased capacity (Figure 9-14).

You may now block the overflow capacities of these rooms.

Section 9: Room Assignments

Room	Mar15	Mar16
North Tower-0130A		
North Tower-0130B		
North Tower-0130C		

Figure 9-14

9.3 Find/Assign Vacant Room

This method of making room assignments is ideal if you need to find any vacant room for a participant. Only rooms that have neither been blocked nor have any participants assigned to them will be displayed.

1. In the browse tree, expand Subgroups/Participants, click on the name of the Participant you want to assign to a room, and click the General tab.
2. In the browse tree again, expand Room Assignments and click Find/Assign Vacant Room (or click the Procedures button on the toolbar and select Assign Vacant Room). The Find Vacant Room window will open (Figure 9-15). The Check-In and Check-Out fields will automatically display the participant's check-in and check-out dates. To find a vacant room for a different date range, change these values.
3. Select a building in the Building field and click the Refresh button. A list of all available rooms in the selected building within the selected date range is displayed (Figure 9-16). If you change the Building, Check-In, or Check-Out fields, click the Refresh button again to update the list of vacant rooms.

Room	Room Type	When Available	Next Use
------	-----------	----------------	----------

Figure 9-15

Notice the When Available and Next Use columns. These may be helpful in determining what room to use. In this example, room 0130B will be occupied next on 3/19/02. You may not want to assign the participant to

Section 9: Room Assignments

Room	Room Type	When Available	Next Use
<input checked="" type="checkbox"/> 0130B	Double	09/29/01	03/19/02
<input checked="" type="checkbox"/> 0130C	Single	09/29/01	08/26/02
<input checked="" type="checkbox"/> 0140C	Double	09/27/01	08/26/02
<input type="checkbox"/> 0150A	Single	n/a	08/26/02

Figure 9-16

this room because it will be occupied again the day after this participant leaves - such a quick turnaround may not be possible for your housekeeping staff. You may want to put this participant in 0130C, which is a single, or in 0140C, which is a double.

Also notice the check marks next to each room. If a room has a check mark, it has been designated as cleaned by the housekeeping staff - no check mark means the room is not clean (see Section 17.11: Mark Rooms Cleaned Wizard).

4. To assign the room, click the room number you want to assign the current participant to and click the Assign button, then click the Post button on the toolbar. The room assignment for this participant is displayed under the Arrival and Assignments portion of the Participant's General tab (Figure 9-17).

Building: North Tower
Rm: 0140C

Figure 9-17

If you try to assign an unclean room to a participant, you will get a warning (Figure 9-18). Click the OK button to assign the unclean room, or click the Cancel button to go back and select another room.

9.4 Find/Assign Blocked Room

This method of assigning a room is ideal for placing a participant into a room that has been pre-blocked for a conference.

1. In the browse tree, expand Subgroups/Participants, click on the name of the Participant you want to assign to a room, and click the General tab.

Section 9: Room Assignments

- In the browse tree again, expand Room Assignments and click Find/Assign Blocked Room (or click the Procedures button on the toolbar and select Assign Blocked Space). The Assign Blocked Space window will open (Figure 9-19).
- Check the “Vacant Rooms Only” checkbox to have the wizard only display blocked rooms that are completely vacant; that have no participants in them. Check the “Same gender only” checkbox to have the wizard display only blocked rooms that have a participant in them of the same gender as the current participant, or that have no participants in them at all. If the participant you are working with is in a subgroup, you will have the option to check the “Participant’s subgroup only” checkbox to have the wizard display only rooms that were blocked for the subgroup the participant is in. If the participant you are working with is not in a subgroup, the last checkbox will be gray and you will not be able to use it. Click the Next button.

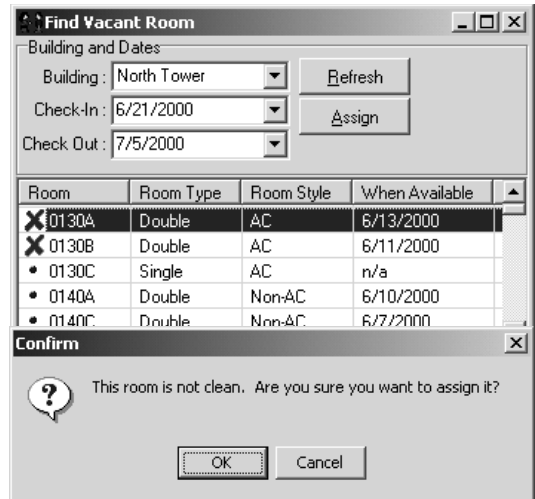


Figure 9-18



Figure 9-19

A list of all available rooms in the selected building within the selected date range is displayed (Figure 9-20).

Section 9: Room Assignments

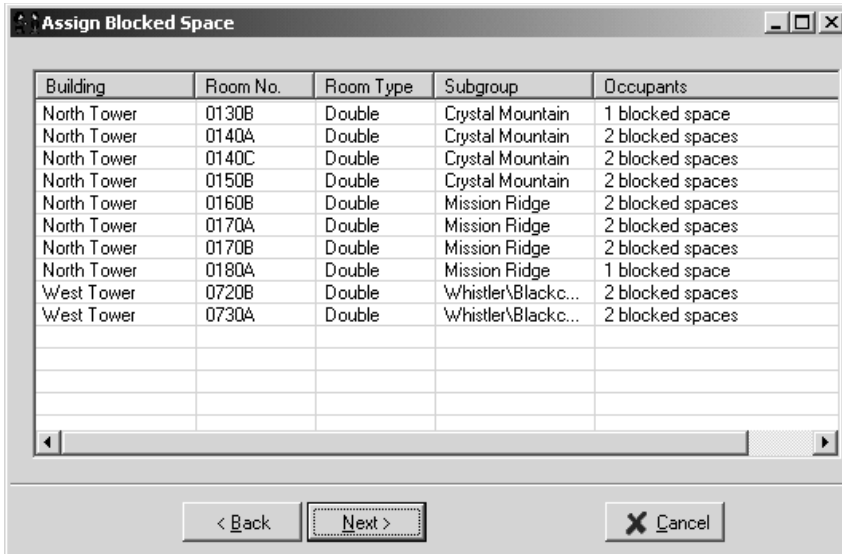


Figure 9-20

4. Select the room you want to assign to the participant and click the Next button. Click the Cancel button to close the wizard. The room assignment for this participant is displayed under the Arrival and Assignments portion of the Participant's General tab.

9.5 Batch Assignments Wizard

The Batch Assignments wizard makes it easy to assign participants to rooms if the participants are already entered in Conference Programmer. For example, if you have 100 participants in Conference Programmer and 100 beds blocked, you can run this wizard to rapidly assign participants to those rooms. Or if you have a printed list of your blocked rooms (like the "Assignment List No Subgroups" report in report folder #6) and your participants' names have been written next to the appropriate room number as they checked in, this wizard makes it easy to assign the correct participants to the appropriate rooms.

Make sure you are working in the correct conference, that the participants have already been entered into Conference Programmer, and that the conference has rooms blocked.

1. In the browse tree, expand Room Assignments and click Batch Assignments. The Batch Assignments window will open. Click the Next button (Figure 9-21).

Section 9: Room Assignments

A list of all rooms blocked for this conference is displayed. Figure 9-21 shows that room 0130A in North Tower is listed twice, as are some of the other rooms - each listing represents a bed. If North Tower room 0130A was blocked as a double, it will show up twice in this list.

Room Number	Participant
North Tower 0130A	[Drop-down menu]
North Tower 0130A	
North Tower 0130B	
North Tower 0130B	
North Tower 0130C	
North Tower 0140A	
North Tower 0140A	
North Tower 0140C	
North Tower 0140C	
North Tower 0150A	
North Tower 0150B	

Figure 9-21

2. Click in the Participant column next to the first room. A drop-down list opens containing every participant in this conference not yet assigned to a room. Click on the participant you want to assign to the current room.
3. Press the Tab key on the keyboard to move to the next room, then select a participant for it, and continue until your room assignments are done.

An even faster way to assign participants in this wizard is to use the keyboard. Click in the Participant column next to the first room, then start typing the last name of the participant you want to assign to this room; the list automatically scrolls to the participant you are typing. When the appropriate participant is selected (when you have typed enough of their last name to identify them), simply press the Tab key on the keyboard to move to the next room and continue the process.

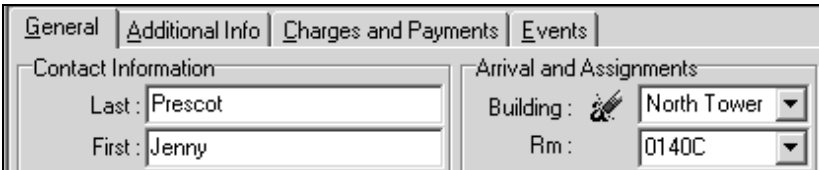
Notice that as you assign participants to rooms in this wizard, their names do not appear in the list for the next room. Although the rooms assignments have not actually been processed yet (they will be processed when you complete the wizard), the wizard knows you want to assign them to a room so it updates the list of unassigned participants automatically.

4. Click the Next button to process all your assignments. Click the OK button to close the wizard.

Section 9: Room Assignments

9.6 Deleting a Room Assignment

1. In the browse tree, expand Subgroups/Participants, click on the name of the Participant whose room assignment you want to delete, and click the General tab.
2. Click the pencil-eraser button on the right in the Arrival and Assignments section, immediately to the left of the Building field (Figure 9-22). This erases the building and room assignment, not the participant. Click the Post button.



The screenshot shows a software window with four tabs: 'General', 'Additional Info', 'Charges and Payments', and 'Events'. The 'General' tab is active. It is divided into two sections: 'Contact Information' and 'Arrival and Assignments'. Under 'Contact Information', there are two text input fields: 'Last' containing 'Prescot' and 'First' containing 'Jenny'. Under 'Arrival and Assignments', there are two dropdown menus: 'Building' with a pencil-eraser icon to its left, currently set to 'North Tower', and 'Rm' currently set to '0140C'.

Figure 9-22

You can delete a participant's room assignment from the Reservation Calendar by clicking on the room assignment (the cell in the Reservation Calendar with the participant's name) and clicking the Delete button on the toolbar, or by right-clicking anywhere in the window and selecting Delete. This will only delete the room assignment, not the participant. The participant's name will re-appear in the participant list, if you have it open, because they are now unassigned.

9.7 Other Room Assignment Features

Two other features under Room Assignments are Check Room Occupants and Room Availability. Both of these features are very helpful aides in determining room inventory, but are not methods for making room assignments.

Check Room Occupants

This feature is used to determine who is in a particular room on a specific date.

1. In the browse tree, expand Room Assignments and click Check Room Occupants. The Room Occupants window will open (Figure 9-23).

Section 9: Room Assignments

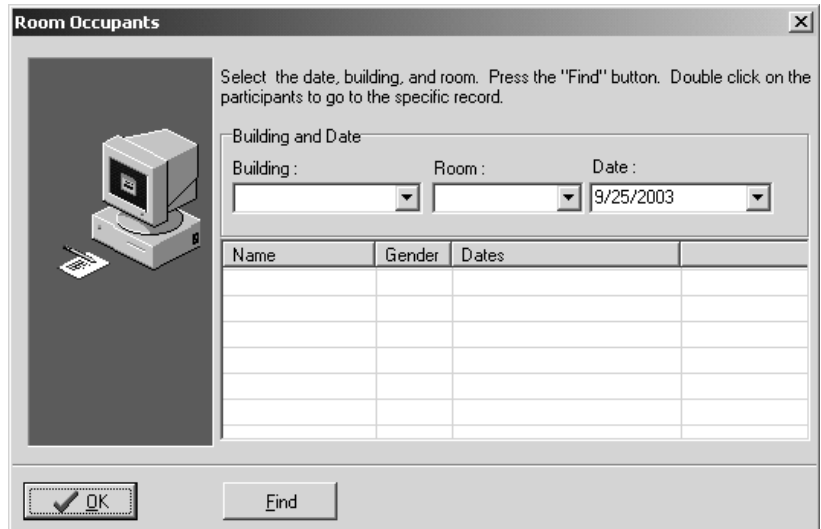


Figure 9-23

2. Select a building in the Building field and a room number from the Room field. The Date field is automatically filled in with today's date. You can change this date to find the occupants of a room on any date. Click the Find button. If there are any, the participant(s) in that room will be displayed (Figure 9-24). Double-click a participant in the list to load their record behind the wizard window.

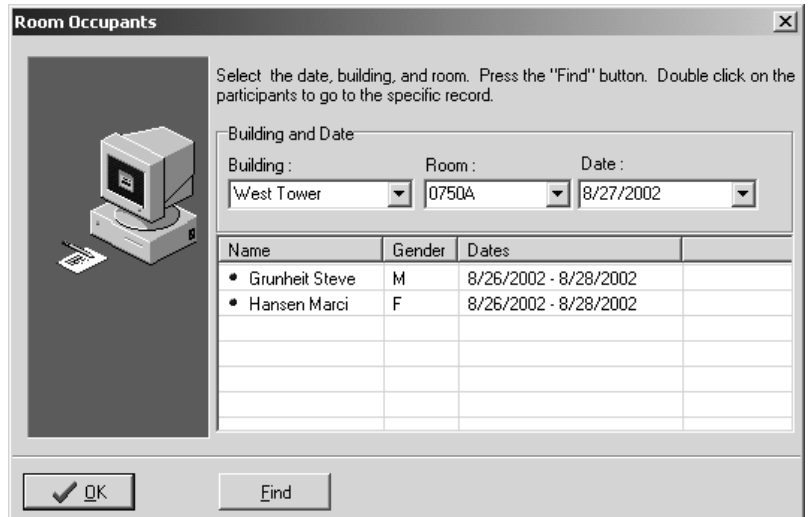


Figure 9-24

Click the OK button to close the Check Room Occupants wizard.

Section 9: Room Assignments

Room Availability

This feature is helpful in determining general room availability within a specific date range.

1. In the browse tree, expand Room Assignments and click Room Availability. The Room Availability window will open (Figure 9–25).

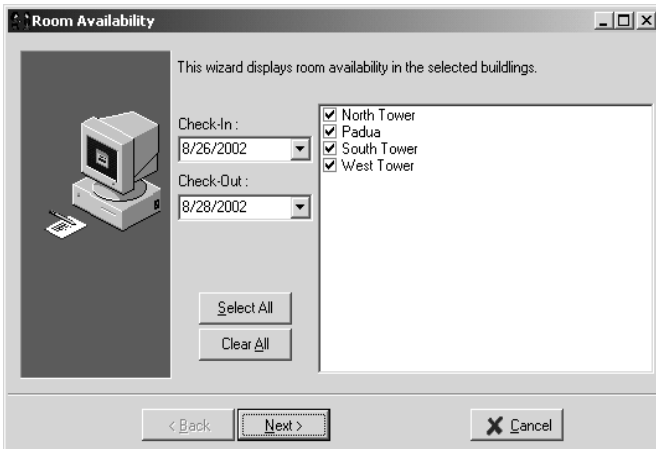


Figure 9-25

2. The Check-In and Check-Out fields are automatically filled in with today's and tomorrow's dates, which isn't very useful. Be sure to change these dates to the range during which you are looking for room availability. Check the checkbox next to each building you want to search for available rooms. You can select all or none of your buildings by clicking the Select All or the Clear All buttons, respectively. Click the Next button.

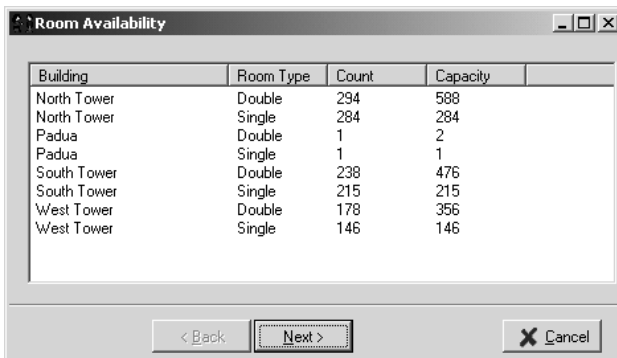


Figure 9-26

The available rooms for the chosen building(s) are displayed (Figure 9–26). This is very helpful for the situation when someone calls and inquires about room availability during a specific time of year. Click the Next button to close the Room Availability wizard.

Section 10: Billing

10 Billing

Billing is the single most important and time-consuming process in Conference Programmer. Although Conference Programmer has many great features to help ensure a successful conference season, the billing process is where the power lies. Conference Programmer is so flexible, we will not list every possible combination of options you can use in setting up rate structures and billing options. But, by studying our examples and through experience, you will learn how to use this program to fit your specific needs.

The billing process involves calculating all charges and then invoicing the main contact for the group (Group Billing), the individual participant (Individual Billing), a subgroup (Subgroup Billing), or any combination of the three.

Our focus in discussing billing is on calculating charges. Entering a payment is almost as simple as clicking the Add Payment button. The calculation of charges - with the multitude of possibilities - is what creates the challenge.

10.1 Group Billing

Group Billing usually involves sending an invoice to the conference contact - the individual whose contact information is on the Conference General tab - which will include charges for all the participants in the Conference.

The steps for group billing are:

1. Run the appropriate wizard. To calculate housing charges you will most likely run the Group Bill wizard. You may or may not run the Meal Planning, Catering, or Meeting Room Wizards, depending on what services the group uses. Calculating charges after running the wizards is discussed in this section.
2. Post the Charges to the Conference Charges and Payments tab. After the wizards have been run, the totals can be calculated. With the Group Bill wizard, the total housing charges may be calculated and posted automatically. For Meal Planning, Catering, and Meeting Room charges, use the corresponding "Group Billing Worksheet" reports (report folder #11) to calculate the total charges.
3. Print and send an invoice. This would most likely be sent to the

Section 10: Billing

conference contact. To generate an invoice, print the “Conference Summary Bill” report (report folder #12).

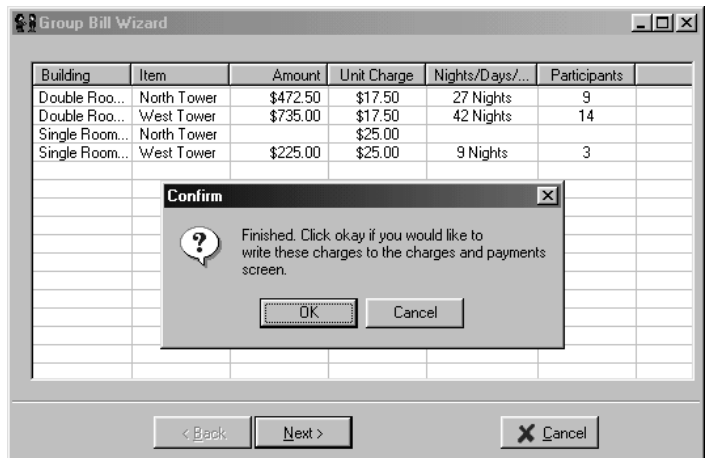
Calculating Housing Charges With the Group Bill Wizard

Calculating the housing charges is the greatest strength of Conference Programmer and is completely automatic. Unfortunately, the housing charges are usually the most complex charges to determine. You will most likely have participants in single and double rooms, multiple buildings, different participant types, different lengths of stay, varying discounts, multiple events, and other various factors that might affect housing charges.

For this example, we will assume two conditions exist: Your conference has a complete Transaction Template with charges applied to the Conference (see Section 5.1: Setting Up a Transaction Template) and your participants have room assignments.

1. In the browse tree, expand Wizards and click Group Bill. The Group Bill Wizard window will open. Make sure you are on the correct conference. If not, close the wizard, select the appropriate conference, and re-open the Group Bill Wizard. Click the Next button.

The Group Bill Wizard automatically calculates charges for each participant’s housing based upon the conditions established in the Transaction Template (Figure 10-1).



2. When the calculation is complete, you will see a confirmation window. Click the OK button to write the charges to the Conference Charges and Payments tab.

Figure 10-1

Section 10: Billing

If you have already run the Group Bill wizard and applied the charges, doing so again will not cause a problem; in fact it can only be beneficial. You might be asked what you want to do (replace the old charges with the new ones, reverse the old charges and add the new ones, etc.). If you are not sure if the charges on the Conferences Charges and Payments tab are up to date, click the OK button to write the current charges (which are correct, because they were calculated right now) to the Conference Charges and Payments tab and replace the old charges with the new ones (or mark the old charges deleted).

3. You will then be asked if you want to view the current charges in a report (Figure 10-2). If you want to view a report showing only the currently calculated charges (there are other possible charges that are not calculated in the Group Bill wizard), click the OK button to open the Group Billing Report window. Choose the report you would like to view from the Group Billing Report field and click the Next button. You may print the report by clicking the button with the printer icon.

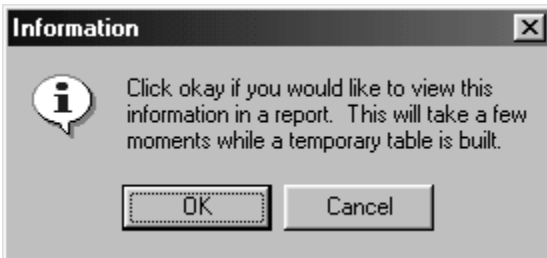
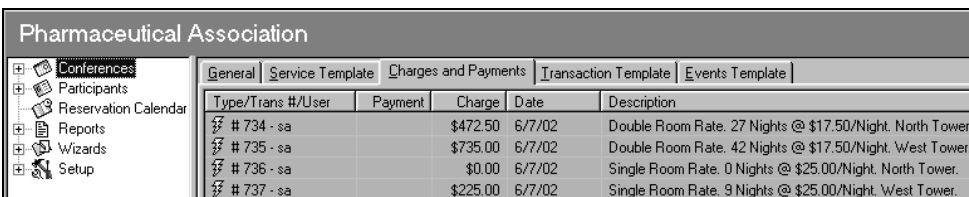


Figure 10-2

4. Click the Next button to exit the Group Bill wizard.

Viewing Charges

The charges generated by running the Group Bill wizard are posted to the Conference Charges and Payments tab. If you have elected to include the building code on auto charges (see Section 10.7: Charge Date Rules), the charges are itemized by building. To view the charges, click Conferences in the browse tree and click the Charges and Payments tab (Figure 10-3).

A screenshot of a software interface for a "Pharmaceutical Association". On the left is a navigation tree with icons and labels: "Conferences", "Participants", "Reservation Calendar", "Reports", "Wizards", and "Setup". The "Conferences" item is selected. The main area shows a tabbed interface with tabs for "General", "Service Template", "Charges and Payments", "Transaction Template", and "Events Template". The "Charges and Payments" tab is active, displaying a table with columns: "Type/Trans #/User", "Payment", "Charge", "Date", and "Description".

Type/Trans #/User	Payment	Charge	Date	Description
# 734 - sa		\$472.50	6/7/02	Double Room Rate. 27 Nights @ \$17.50/Night. North Tower.
# 735 - sa		\$735.00	6/7/02	Double Room Rate. 42 Nights @ \$17.50/Night. West Tower.
# 736 - sa		\$0.00	6/7/02	Single Room Rate. 0 Nights @ \$25.00/Night. North Tower.
# 737 - sa		\$225.00	6/7/02	Single Room Rate. 9 Nights @ \$25.00/Night. West Tower.

Figure 10-3

The current balance due for the conference is displayed at the bottom of the screen in the status bar.

Calculating Meal Charges

1. To determine meal charges you must first run the Meals wizard (see Section 13: Meals Wizard).
2. In the browse tree, expand Reports, expand “(11) Group Billing Worksheets” (report folder #11), and click the “Food Service Billing” report (Figure 10-4) (see Section 16.1: Viewing Reports). Select the conference you want to calculate charges for in the Conference field and click the Preview button on the toolbar.

Date	Breakfast		Lunch		Dinner		Amount	TaxA	TaxB	Total Amount
	Count	Rate	Count	Rate	Count	Rate				
North										
Sep 27 01	50	4.00	53	5.50	50	5.50	766.50	44.84	0.00	811.34
Sep 28 01	50	4.00	53	5.50	50	5.50	766.50	44.84	0.00	811.34
Sep 29 01	50	4.00	53	5.50	50	5.50	766.50	44.84	0.00	811.34
Dining Hall Totals	150		159		150		2,299.50	134.52	0.00	2,434.02
South										
Sep 27 01	25	4.00	25	5.50	25	5.50	375.00	21.94	0.00	396.94
Sep 28 01	25	4.00	25	5.50	25	5.50	375.00	21.94	0.00	396.94
Sep 29 01	25	4.00	25	5.50	25	5.50	375.00	21.94	0.00	396.94
Dining Hall Totals	75		75		75		1,125.00	65.82	0.00	1,190.82
Report Totals										
	225		234		225		3,424.50	200.34	0.00	3,624.84

Figure 10-4

3. This report displays the amount, tax, and total amount (amount + tax) of the selected conference’s Meals. You can manually post the meals charge on the Conference Charges and Payments tab: You should manually enter the pre-tax total for the meals, and select the appropriate tax rule - Conference Programmer will calculate the tax for you. Only in this way can you separate tax from the charge in revenue reports (if you enter a manual charge for the total plus the tax and apply a “No Tax” rule to it, Conference Programmer cannot know how much of the total is for meals and how much is for tax).

Calculating Meeting Room Charges

1. To determine meeting room charges you must first run the Meeting Room wizard (see Section 15: Meeting Facilities Wizard).
2. In the browse tree, expand Reports, expand “(11) Group Billing Worksheets” (report folder #11), and click the “Facilities Billing” report (see Section 16.1: Viewing Reports). Select the conference

Section 10: Billing

you want to calculate charges for in the Conference field and click the Preview button on the toolbar.

3. This report displays the amount, tax, and total amount (amount + tax) of the selected conference's Meeting Rooms. You can manually post the meeting rooms charge on the Conference Charges and Payments tab: You should manually enter the pre-tax total for the meeting rooms, and select the appropriate tax rule - Conference Programmer will calculate the tax for you. Only in this way can you separate tax from the charge in revenue reports (if you enter a manual charge for the total plus the tax and apply a "No Tax" rule to it, Conference Programmer cannot know how much of the total is for meeting rooms and how much is for tax).

Calculating Catering Charges

1. To determine catering charges you must first run the Catering wizard (see Section 14: Catering Wizard).
2. In the browse tree, expand Reports, expand "(11) Group Billing Worksheets" (report folder #11), and click the "Catering Billing" report (see Section 16.1: Viewing Reports). Select the conference you want to calculate charges for in the Conference field and click the Preview button on the toolbar.
3. This report displays the amount, tax, and total amount (amount + tax) of the selected conference's Catering. You can manually post the catering charge on the Conference Charges and Payments tab: You should manually enter the pre-tax total for catering, and select the appropriate tax rule - Conference Programmer will calculate the tax for you. Only in this way can you separate tax from the charge in revenue reports (if you enter a manual charge for the total plus the tax and apply a "No Tax" rule to it, Conference Programmer cannot know how much of the total is for catering and how much is for tax).

Manual Conference Charge Entry

You can manually enter a charge on the Conference Charges and Payments tab. For example, once you have generated totals for Meals, Catering, or Meeting Rooms via the appropriate wizards and billing reports, you manually enter the appropriate charge on the Conference Charges and Payments tab.

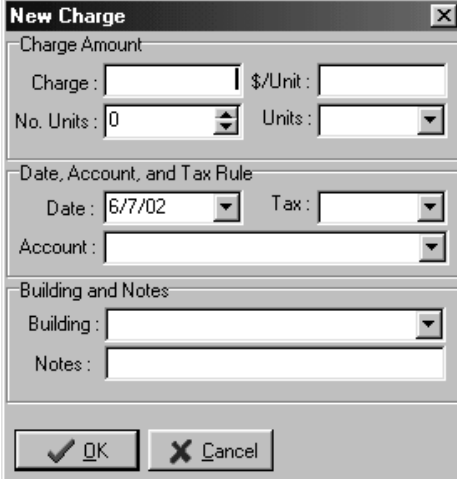
Section 10: Billing

1. Make sure you are working in the conference you want to manually add a charge to. In the browse tree, click Conferences and click the Charges and Payments tab.
2. Click the Add Charge button on the toolbar. The New Charge dialog box will appear (Figure 10-5).
3. Enter the amount of the charge in the Charge field - in this example, this is the pre-tax total you generated on the appropriate billing report. Choose a tax rule from the Tax field - this field is required even if you do not charge tax. Select an account to track this charge from the Account field. The Date field is automatically filled in with the conference's check-out date (see Section 10.7: Charge Date Rules), but you can change this to the date you want this charge to be posted. Figure 10-6 shows \$500.00 charged to the Miscellaneous account using the "No Tax" rule to be posted on June 7, 2002.

You can select a building in the Building field if you want to track charges that specifically. For example, if you want to track Meeting Room charges in the North Tower building separately from Meeting Rooms charges in the South Tower building, you can select the appropriate building for each charge.

You can also enter any information you want into the Notes field (up to 100 characters). This will appear on the invoice that your customer sees.

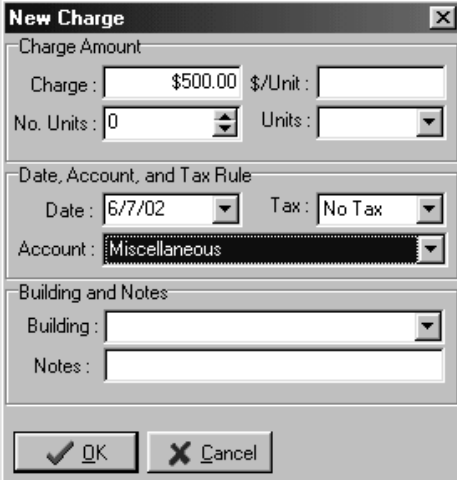
4. Click the OK button to post the charge.



The 'New Charge' dialog box is shown with the following fields and values:

- Charge Amount:** Charge: [], \$/Unit: [], No. Units: 0, Units: []
- Date, Account, and Tax Rule:** Date: 6/7/02, Tax: [], Account: []
- Building and Notes:** Building: [], Notes: []

Figure 10-5



The 'New Charge' dialog box is shown with the following fields and values:

- Charge Amount:** Charge: \$500.00, \$/Unit: [], No. Units: 0, Units: []
- Date, Account, and Tax Rule:** Date: 6/7/02, Tax: No Tax, Account: Miscellaneous
- Building and Notes:** Building: [], Notes: []

Figure 10-6

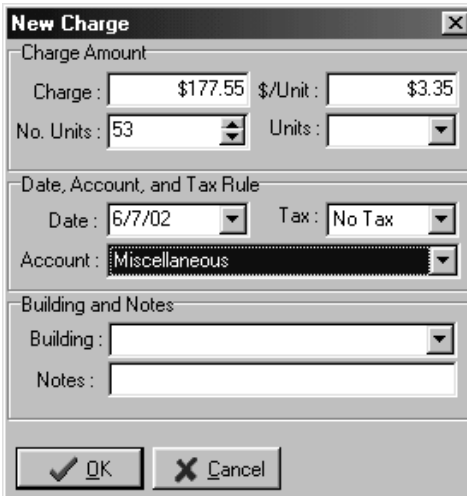
Section 10: Billing

Entering Charges On a Cost-Per-Unit Basis

You can also manually enter a charge on a cost-per-unit basis. For example, 53 of a conference's participants rent an alarm clock at the rate of \$3.35 per rental. In this example, in the New Charge dialog box you would set the No. Units field to 53 (you can type "53" or click the up/down arrows to adjust the value of the field). You would also type "3.35" in the \$/Unit field, and select a tax rule in the Tax field and an account in the Account field, then click the OK button to post the charge.

Notice we left the Units field empty in this example (Figure 10-7). The posted charge would say "Miscellaneous. 53 @ \$3.35. No Tax" (with

"Miscellaneous" replaced with the account you selected). If you want more detail, you can customize the items listed in the Units field's drop-down list (see Section 17.1: Changing a Drop-Down List). You could add a unit called "Alarm Clocks" and select it in the Unit field. The charge would then say "Miscellaneous. 53 Alarm Clocks @ \$3.35. No Tax" (with "Miscellaneous" replaced with the account you selected). Although this method displays more detail, keep in mind that for each time you use it, you must enter another value in the Units field's drop-down list. This list could quickly get out of control. A better solution may be to leave the Units field empty and enter in the Notes field any detail you want.



The screenshot shows a 'New Charge' dialog box with the following fields and values:

- Charge Amount:**
 - Charge: \$177.55
 - \$/Unit: \$3.35
 - No. Units: 53
 - Units: (empty)
- Date, Account, and Tax Rule:**
 - Date: 6/7/02
 - Tax: No Tax
 - Account: Miscellaneous
- Building and Notes:**
 - Building: (empty)
 - Notes: (empty)

Buttons: OK, Cancel

Figure 10-7

Printing Conference Invoices

Printing an invoice for a conference is slightly different than printing an invoice for a participant or for a subgroup.

1. In the browse tree, expand Reports, then expand "(12) Conference Billing" (report folder #12) and click "Conference Summary Bill" (see Section 16.1: Viewing Reports). Select the conference you want to print an invoice for in the Conference field, then click the Preview button on the toolbar. An invoice report is displayed for the selected conference. Click the button with the printer icon to print the invoice.

10.2 Individual Billing

When billing individuals, charges are posted on the Participants Charges and Payments tab instead of the Conferences Charges and Payments tab. Although both of these tabs display the same type of information and look very similar, the background color of the Conferences Charges and Payments tab is blue, while the background color of the Participants Charges and Payment tab is white - this is to help you quickly differentiate them. Use individual billing only if you intend to invoice each participant directly, much like a hotel. To post charges for participants you can run the Auto Charge wizard or click the Auto Charge button on the toolbar while viewing a participant's Charges and Payments tab. You can also enter a charge manually.

Participant Auto Charge Wizard

For this example, we will assume two conditions exist: Your conference has a complete Transaction Template with charges applied to the Participant (see Section 5.2: Applying Charges To the Participant), and your participants have room assignments.

1. In the browse tree, expand Wizards and click Auto Charge. The Auto Charge Wizard window will open (Figure 10-8). Make sure you are working with the desired conference.



Figure 10-8

Section 10: Billing

2. You can tell the wizard to calculate and apply appropriate charges to Subgroups or to Participants. In this example, select Participants and click the Next button.
3. All participants in the selected conference are listed. By default, all participants have a check mark next to their name, signifying that the wizard should apply charges to those participants (the wizard ignores participants without a check mark). If you have applied auto charges to a participant before, their name will not have a check mark in the list - you can still check their checkbox if you want to re-apply the appropriate auto charges. You can check or uncheck all participants by clicking the Select All or Clear All buttons, respectively. Or you can check specific participants by clicking the check box next to their name (Figure 10-9).

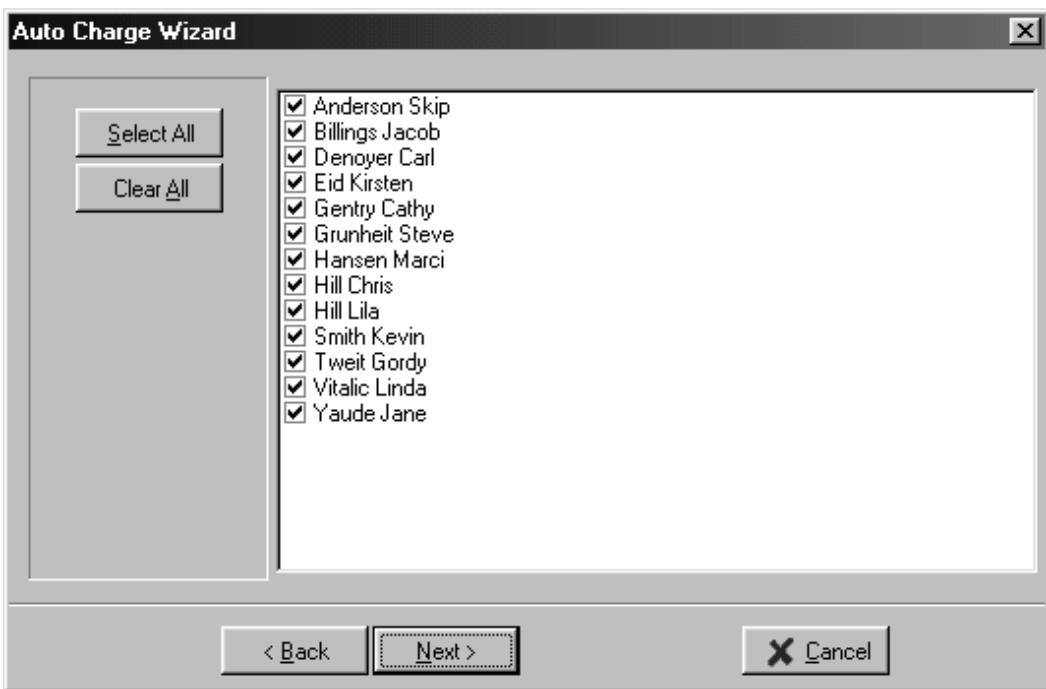


Figure 10-9

4. Click the Next button to run the wizard, which will process charges for all the selected participants.

If you have already run the Auto Charge wizard for Participants or have clicked the Auto Charge button for any participant, doing so again will not cause a problem; in fact it can only be beneficial. You might be asked for

Section 10: Billing

each participant what you want to do (replace the old charges with the new ones, reverse the old charges and add the new ones, etc.). If you are unsure if all of your Participants Charges and Payments tabs are up to date, run the Auto Charge wizard again, select every participant, and replace the old charges with the new ones (or mark the old charges deleted).

5. You will be prompted when the processing is finished. Click the OK button to exit the wizard.

You can view a participant's charges in the Participants Charges and Payments tab. Figure 10-10 shows Skip Anderson's charges. His information met conditions that allowed the Transaction Template to calculate his room and meal charges. Charges for a T-shirt and Lobster Dinner were generated by his choice of events (see Section 6: Events Template).

Skip Anderson						
Participants		General	Additional Info	Charges and Payments	Events	
Type/Trans #/User	Payment	Charge	Date	Description	Tax	
# 674 - sa		\$47.50	8/28/02	Single Room. 2 Nights @ \$23.75/Night. West Tower.	No Tax	
# 675 - sa		\$47.63	8/28/02	Meal Plan A. 3 Days @ \$15.00/Day. West Tower.	Tax ...	
# 676 - sa		\$14.00	8/28/02	Camera Club T-Shirt. 1 @ \$14.00. West Tower.	No Tax	
# 677 - sa		\$25.00	8/28/02	Lobster Dinner and Lecture. 1 @ \$25.00. West Tower.	No Tax	

Figure 10-10

Participant Auto Charge

You can use the Auto Charge button to apply charges to a single participant.

1. In the browse tree, expand Subgroups/Participants, click on the name of the Participant you want to apply charges to, and click the Charges and Payments tab.
2. Click the Auto Charge button on the toolbar. Charges are calculated for that participant only (Figure 10-11). The participant's current balance due is displayed in the status bar at the bottom of the screen.

Jane Yaude						
Participants		General	Additional Info	Charges and Payments	Events	
Type/Trans #/User	Payment	Charge	Date	Description	Tax	
# 738 - sa		\$47.50	8/28/02	Single Room. 2 Nights @ \$23.75/Night. W...		
# 739 - sa		\$47.63	8/28/02	Meal Plan A. 3 Days @ \$15.00/Day. West ...		
# 740 - sa		\$25.00	8/28/02	Lobster Dinner and Lecture. 1 @ \$25.00. ...		

Figure 10-11

Section 10: Billing

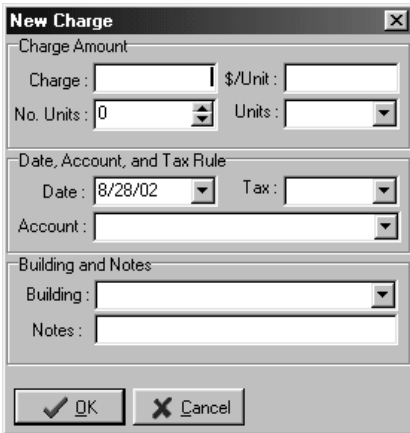


Figure 10-12

Manual Participant Charge Entry

You can manually enter a charge on the Participants Charges and Payments tab.

1. In the browse tree, expand Subgroups/Participants, click on the name of the Participant you want to enter a charge for, and click the Charges and Payments tab.
2. Click the Add Charge button on the toolbar. The New Charge window will open (Figure 10-12).
3. Enter the amount of the charge in the Charge field. Choose a tax rule from the Tax field - this field is required even if you do not charge tax. Select an account to track this charge from the Account field. The Date field is automatically filled in with the participant's check-out date (see Section 10.7: Charge Date Rules), but you can change this to the date you want this charge to be posted.

You can select a building in the Building field if you want to track charges that specifically. For example, if you want to track Lost Key charges in the North Tower building separately from Lost Key charges in the South Tower building, you can select the appropriate building for each charge.

You can also enter any information you want into the Notes field (up to 100 characters). This will appear on the invoice that your customer sees.

4. Click the OK button to post this charge to the participant's record.

Entering Participant Charges On a Cost-Per-Unit Basis.

You can also manually enter a charge on a cost-per-unit basis. For example, a participant purchases 5 parking passes at \$4.00 each. In this example, in the New Charge dialog box you would set the Items field to 5 (you can type "5" or click the up/down arrows to adjust the value of the field). You would also type "4" in the \$/Unit field, and select a tax rule in the Tax field and an account in the Account field, then click the OK button to post the charge (Figure 10-13).

Notice we left the Units field empty in this example. The posted charge would say "Parking. 5 @ \$4.00. No Tax" (assuming you chose the Parking

account). If you want more detail, you can customize the items listed in the Units field's drop-down list (see Section 17.2: Changing a Drop-Down List). You could add a unit called "Parking Passes" and select it in the Unit field. The charge would then say "Parking, 5 Parking Passes @ \$4.00. No Tax" (assuming you chose the Parking account). Although this method displays more detail, keep in mind that for each time you use it, you must enter another value in the Units field's drop-down list. This list could quickly get out of control. A better solution may be to leave the Units field empty and enter in the Notes field any detail you want.

The screenshot shows a 'New Charge' dialog box with the following fields and values:

- Charge Amount:**
 - Amount: \$20.00
 - \$/Unit: \$4.00
 - Items: 5
 - Units: (dropdown menu)
- Date, Account, and Tax Rule:**
 - Date: 3/20/2002
 - Tax: No Tax
 - Account: Parking
- Other:**
 - Building: (dropdown menu)
 - Tag: (dropdown menu)
 - Notes: (text area)

Buttons: OK, Cancel

Figure 10-13

Printing Participant Invoices

Printing an invoice for a participant is slightly different than printing an invoice for a conference or for a subgroup.

1. Make sure you are working with the correct conference. In the browse tree, expand Subgroups/Participants and click on the participant you want to print an invoice for. You might also need to expand the subgroup the participant is in.
2. Click the Quick Report button on the toolbar and select Individual Bill. An invoice report is displayed for the selected participant. Click the button with the printer icon to print the invoice.

You can print invoices for multiple participants simultaneously with the Send Confirmations wizard (see Section 17.15: Send Confirmations Wizard).

10.3 Subgroup Billing

The ability to create and bill a subgroup is vital to many conference operations. A subgroup is like a mini conference within a conference. The subgroup contact (the person whose contact information is on the Subgroup General tab) is usually the person to be invoiced.

Other charges besides housing can be charged to a subgroup. You may choose to enter parking or program fees, for example, in the

Section 10: Billing

Transaction Template as well as the housing charges. Each participant's charges are calculated and applied to the subgroup when you run the Auto Charge wizard for subgroups.

You can set up the Events Template so that the charges for the events apply to the subgroup as well (see Section 6.1: Creating Events).

Subgroup Auto Charge Wizard

In this example, we will assume three conditions exist: Your conference has a complete Transaction Template with charges applied to the Subgroup (see Section 5.4: Applying Charges To a Subgroup), you have subgroups set up in your conference (see Section 7.1: Creating a Subgroup), and your participants have room assignments and are assigned to subgroups (see Section 7.4: Assigning Participants To Subgroups).

In this example, all of our participants are in either a single room or a double room. Figure 10-14 shows our Transaction Template. Note that the Applies To field is set to Subgroup.

Rate Name	Rate Settings
Double Room	\$15.00 / Night. No Tax. Housing.
Single Room	\$22.00 / Night. No Tax. Housing.

Edit Transaction Template

Rate Description

Rate Name: Double Room

Account: Housing

\$/Unit: \$15.00 Units: Nights

Applies To: Subgroup Tax: No Tax

Add Rate Formula Condition

Room Type = Double
Status <> No-Show
Status <> Canceled
Status <> Commuter

OK Cancel

Figure 10-14

Figure 10-15 shows the Events Template for this example. Note again that the Applies field is set to Subgroup.

1. In the browse tree, expand Wizards and click Auto Charge. The Auto Charge Wizard window will open (Figure 10-16). Make sure you working with the desired conference.
2. You can tell the wizard to apply appropriate charges to Subgroups or to Participants. In this example, select Subgroups and click the Next button.
3. All subgroups in the selected conference are listed. By default, all subgroups have a check mark next to their name, signifying that the wizard should apply charges to those subgroups (the wizard ignores subgroups without a check mark). If you have applied auto charges to a subgroup before, that subgroup will not have a check mark in the list - you can still check its checkbox if you want to re-apply the appropriate auto charges. You can check or uncheck all

Section 10: Billing

subgroups by clicking the Select All or Clear All buttons, respectively. Or you can check specific subgroups by clicking the check box next to their name (Figure 10-17).

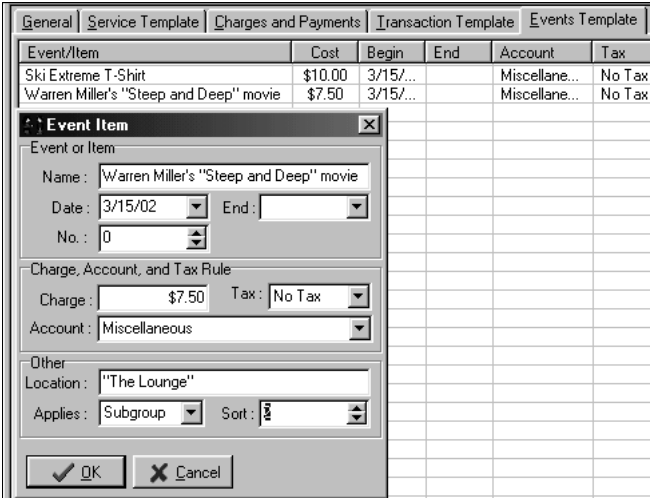


Figure 10-15

4. Click the Next button to run the wizard, which will process charges for all the selected subgroups.

If you have already run the Auto Charge wizard for Subgroups, doing so again will not cause a problem; in fact it can only be beneficial. You might be asked for each subgroup what you want to do (replace the old charges with the new ones, reverse the old charges and add the new ones, etc.). If you are unsure if all of your Subgroups Charges and Payments tabs are up to date, run the Auto Charge wizard again, select every subgroup, and replace the old charges with the new ones (or mark the old charges deleted).



Figure 10-16

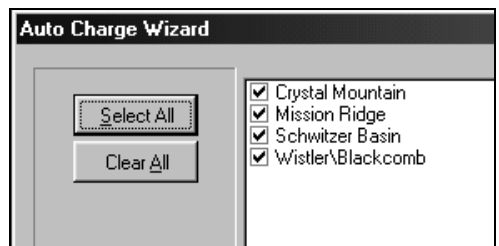
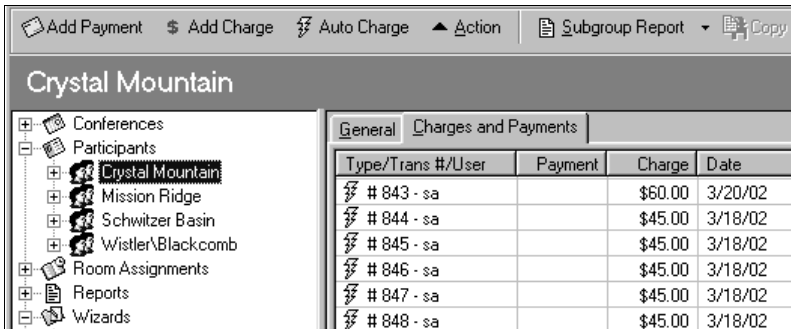


Figure 10-17

Section 10: Billing

5. You will be prompted when the processing is finished. Click the OK button to exit the wizard.

You can view a subgroup's charges in the Subgroups Charges and Payments tab. Figure 10-18 shows a subgroup's charges from our example.

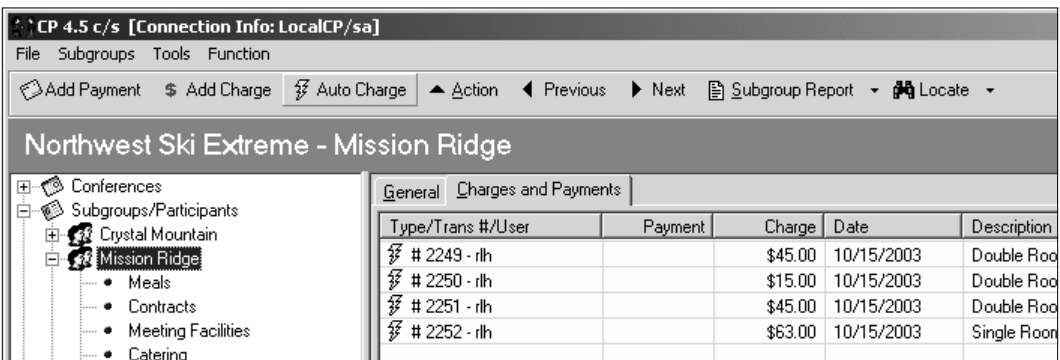


Type/Trans #/User	Payment	Charge	Date
# 843 - sa		\$60.00	3/20/02
# 844 - sa		\$45.00	3/18/02
# 845 - sa		\$45.00	3/18/02
# 846 - sa		\$45.00	3/18/02
# 847 - sa		\$45.00	3/18/02
# 848 - sa		\$45.00	3/18/02

Figure 10-18 **Subgroup Auto Charge**

You can use the Auto Charge button to apply charges to a single subgroup.

1. In the browse tree, expand Subgroups/Participants, click on the name of the subgroup you want to apply charges to, and click the Charges and Payments tab.
2. Click the Auto Charge button on the toolbar. Charges are calculated for that subgroup only (Figure 10-19). The subgroup's current balance due is displayed in the status bar at the bottom of the screen.



Type/Trans #/User	Payment	Charge	Date	Description
# 2249 - rth		\$45.00	10/15/2003	Double Room
# 2250 - rth		\$15.00	10/15/2003	Double Room
# 2251 - rth		\$45.00	10/15/2003	Double Room
# 2252 - rth		\$63.00	10/15/2003	Single Room

Figure 10-19 **Manual Subgroup Charge Entry**

You can manually enter a charge on the Subgroups Charges and Payments tab.

Section 10: Billing

1. In the browse tree, expand Subgroups/Participants, click on the name of the subgroup you want to enter a charge for, and click the Charges and Payments tab.
2. Click the Add Charge button on the toolbar. The New Charge dialog box will appear (Figure 10-20).
3. Enter the amount of the charge in the Charge field. Choose a tax rule from the Tax field - this field is required even if you do not charge tax. Select an account to track this charge from the Account field. The Date field is automatically filled in with the conference's check-out date, but you can change this to the date you want this charge to be posted.



You can select a building in the Building field if you want to track charges that specifically. For example, if you want to track Lost Key charges in the North Tower building separately from Lost Key charges in the South Tower building, you can select the appropriate building for each charge.

Figure 10-20

4. You can also enter any information you want into the Notes field (up to 100 characters). This will appear on the invoice that your customer sees.
5. Click the OK button to post this charge to the subgroup's record.

Entering Subgroup Charges On a Cost-Per-Unit Basis.

You can also manually enter a charge on a cost-per-unit basis. For example, you want to charge the subgroup for 5 parking passes at \$4.00 each. In this example, in the New Charge dialog box you would set the Items field to 5 (you can type "5" or click the up/down arrows to adjust the value of the field). You would also type "4" in the \$/Unit field, and select a tax rule in the Tax field and an account in the Account field, then click the OK button to post the charge (Figure 10-21).

Notice we left the Units field empty in this example. The posted charge would say "Parking. 5 @ \$4.00. No Tax" (assuming you chose the Parking account). If you want more detail, you can customize the items listed in the

Section 10: Billing

The screenshot shows a 'New Charge' dialog box with the following fields and values:

- Charge Amount:** Amount: \$20.00, \$/Unit: \$4.00, Items: 5, Units: (dropdown)
- Date, Account, and Tax Rule:** Date: 3/20/2002, Tax: No Tax, Account: Parking
- Other:** Building: (dropdown), Tag: (dropdown), Notes: (text field)

Buttons: OK, Cancel

Units field's drop-down list (see Section 17.1: Changing a Drop-Down List). You could add a unit called "Parking Passes" and select it in the Unit field. The charge would then say "Parking. 5 Parking Passes @ \$4.00. No Tax" (assuming you chose the Parking account). Although this method displays more detail, keep in mind that for each time you use it, you must enter another value in the Units field's drop-down list. This list could quickly get out of control. A better solution may be to leave the Units field empty and enter in the Notes field any detail you want.

Figure 10-21

Printing Subgroup Invoices

Printing an invoice for a subgroup is slightly different than printing an invoice for a conference or for an individual participant.

1. Make sure you are working with the correct conference. In the browse tree, expand Subgroups/Participants and click on the subgroup you want to print an invoice for.
2. Click the Subgroup Report button on the toolbar and select Subgroup Billing. An invoice report is displayed for the selected subgroup. Click the button with the printer icon to print the invoice.

You can print invoices for multiple subgroups simultaneously with the Send Confirmations wizard (see Section 17.15: Send Confirmations Wizard).

10.4 Combinations of Conference, Subgroup, and Participant Billing

You can set up the Transaction Template to apply charges to both the conference and the participant (see Section 5.3: Applying Charges To Both Conference and Participants). Once the Transaction Template is set up correctly, run the Group Bill wizard to apply the appropriate charges to the conference, and run the Auto Charge wizard to apply the appropriate charges to the participants.

The same is true for applying charges to subgroups - any combination of charges between conferences, subgroups, and participants is possible.

10.5 Editing and Deleting Charges

There are two types of charges; auto charges and manual charges. To edit an auto charge, you must adjust the criteria that determine the charge and then run the Group Bill wizard (for group billed charges) or the Auto Charge wizard (for individual or subgroup billed charges) again, which will re-calculate the correct current charges. A manual charge can be applied to the conference, the subgroup, or the participant without running any wizards, and running a wizard will not affect any manual charge or payment.

Editing Auto Charges

In a previous example, we had set up the Transaction Template for the Northwest Ski Extreme conference to apply a Double room charge of \$15.00/Night for each participant to a subgroup (Figure 10-14). Now, let's suppose we made a mistake and need to recalculate the rate at \$17.00/Night.

Change the rate in the Transaction Template to \$17.00 and run the Auto Charge wizard for subgroups again. The wizard will realize that the subgroup already has auto charges and will prompt you with the Suggested Adjustments window (Figure 10-22).

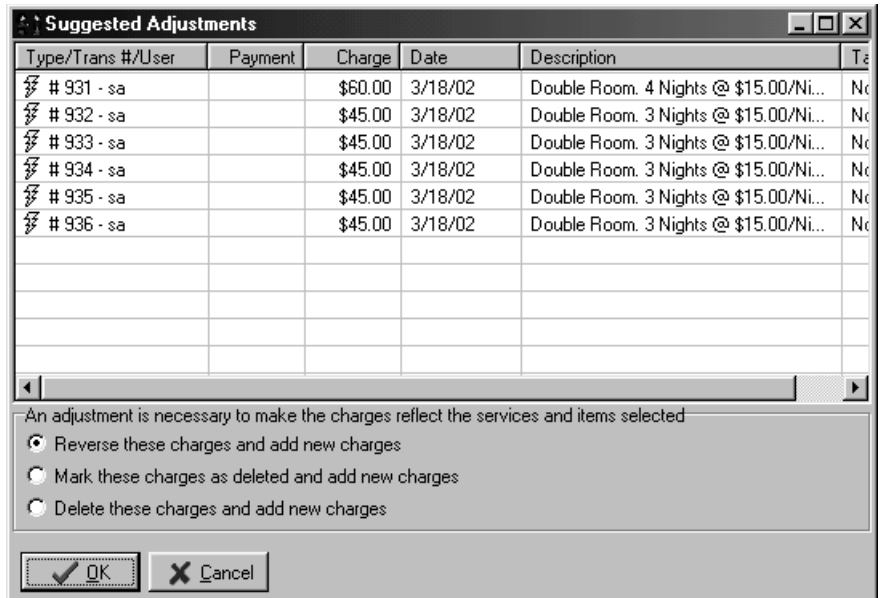


Figure 10-22

Section 10: Billing

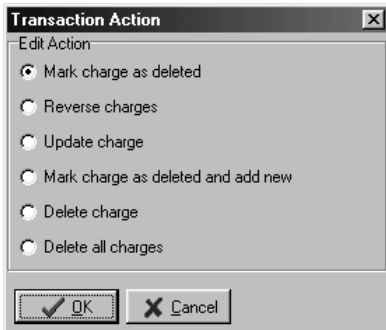
When you select “Reverse these charges and add new charges” the wizard will leave a record of the earlier charges but reverse them and add the new, correct charges. The original charges, the reversed charges, and the new, correct charges will all appear on your customer’s invoice, however. When you select “Mark these charges as deleted and add new charges,” the old charges remain in Conference Programmer, so an audit trail is still maintained, but they are essentially deleted as far as the customer’s balance and invoice are concerned - your customer will never see them. You should determine which method your accounting department prefers and use this method as often as possible.

The process is the same for charges generated by the Group Bill wizard or the Auto Charge wizard for participants.

Editing Manual Charges

You cannot edit auto charges, only charges that you manually created.

1. Click the Charges and Payments tab of the conference, subgroup, or participant that contains the payment you want to edit.



2. Click on the charge you want to edit and click the Action button on the toolbar, or right-click the charge and select Action. The Transaction Action window will open (Figure 10-23).
3. Select “Update charge” and click the OK button. The Edit Charge window will open. Change the appropriate information and click the OK button to post the modified charge.

Figure 10-23

Delete A Charge

You can delete any charge that has not been reconciled (see Section 10.9: Reconciling Charges and Payments).

1. From the Charges and Payments tab of a conference, subgroup, or participant, click on the charge you want to delete.
2. Click the Action button on the toolbar, or right-click the charge you want to delete and select Action. The Transaction Action window will open (Figure 10-24).

The actions that are made available to you in the Transaction Action window depend on both your security privileges and the state of the charge. For example, you might not be permitted to delete a charge, or a charge might be reconciled and deleting it is not an option.

3. Select "Delete charge" and click the OK button. Click the OK button when asked to confirm the deletion (Figure 10-25).

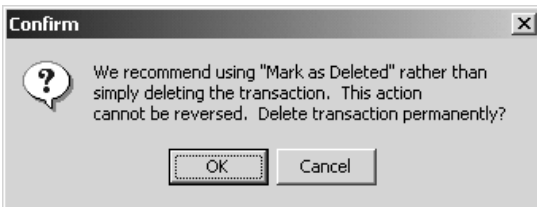


Figure 10-25

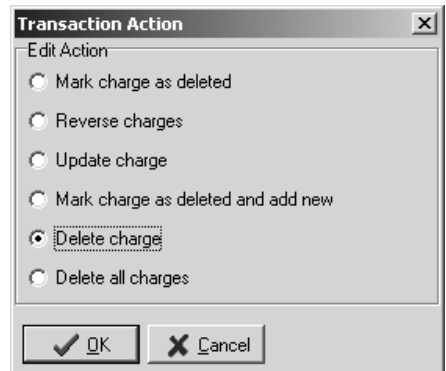


Figure 10-24

10.6 Payments

Entering a Payment

The process of entering a payment is the same whether you are entering a payment for a conference, a subgroup, or a participant.

1. Make sure you are working with the conference, subgroup, or participant you want to add a payment for and click on the Charges and Payments tab.
2. Click the Add Payment button on the toolbar. The New Payment window will open (Figure 10-26). In this example, we are applying a payment to a conference.
3. Enter the payment amount in the Payment field, and the type of payment in the Type field. The Date field is automatically filled in with the current date (see Section 10.7: Charge Date Rules), but you can change this to the date you want this payment to be posted. In the Account field, select whether you want this payment to be considered a payment or a credit. In the Notes field, enter any notes about this payment that you want the customer to see on the invoice.

Section 10: Billing

The screenshot shows the 'New Conference Payment' dialog box. It has four tabs: 'General', 'Service Template', 'Charges and Payments', and 'Transaction Template'. The 'Charges and Payments' tab is selected. The dialog contains the following fields and controls:

- Payment Amount:** 'Payment:' text box, 'Type:' dropdown menu.
- Date, Account, and Receipt No.:** 'Date:' dropdown menu (showing 10/8/01), 'Rcpt:' text box, 'Account:' dropdown menu.
- Building and Notes:** 'Credit No.:' text box, 'Exp:' dropdown menu, 'Notes:' text box.
- Buttons: 'OK' (checked) and 'Cancel'.

Figure 10-26

Editing a Payment

Editing a payment is much like editing a charge.

1. Click the Charges and Payments tab of the conference, subgroup, or participant that contains the payment you want to edit.

The Rcpt, Credit No, and Exp fields are optional, and you can enter a credit card number and expiration date here. Click the OK button.

In this example, we have entered a Visa payment of \$1,500.00 to be posted on 10/8/2001 (Figure 10-27).

The screenshot shows the 'New Conference Payment' dialog box with the following data entered:

- Payment Amount:** 'Payment:' \$1,500.00, 'Type:' Visa.
- Date, Account, and Receipt No.:** 'Date:' 10/8/01, 'Rcpt:' [empty], 'Account:' Payment.
- Building and Notes:** 'Credit No.:' [empty], 'Exp:' [empty], 'Notes:' Deposit received.
- Buttons: 'OK' (checked) and 'Cancel'.

Figure 10-27

The screenshot shows the 'Transaction Action' dialog box. It has a title bar and a close button. The 'Edit Action' section has four radio button options:

- Mark payment as deleted
- Update payment
- Mark payment as deleted and add new
- Delete payment

Buttons: 'OK' (checked) and 'Cancel'.

Figure 10-28

2. Click on the payment you want to edit and click the Action button on the toolbar, or right-click on the payment and select Action. The Transaction Action window will open (Figure 10-28).
3. Select "Update payment" and click the OK button. The Edit Payment window will open. Change the appropriate information and click the OK button to post the modified payment.

Entering a Credit

Credits to customers are handled as a negative payment or a negative credit. For example, a particular conference has a credit balance (they have paid more than they have been charged), and you want to issue them a check for the difference (Figure 10-29).

General Service Template Charges and Payments Transaction Template Events Template						
Type/Trans #/User	Payment	Charge	Date	Description	Tax	
☞ # 1027 - sa	\$1,500.00		10/8/01	Payment received. Visa. Deposit recei...		
\$ # 1028 - sa		\$234.00	3/18/02	Housing.	No Tax	
\$ # 1032 - sa		\$1,882.01	3/18/02	Meals.	Tax ...	
☞ # 1033 - sa	\$1,000.00		10/9/01	Payment received. Check.		

! Credit Due = \$383.99

Figure 10-29

To balance their account, you can enter a negative payment, or negative credit, of -\$383.99. Figure 10-30 shows a negative credit for -\$389.99.

One factor differentiating between a negative credit and a negative payment is the exchange of money. Enter a negative credit if you give money to a conference, subgroup, or participant. In this example, a check was issued to the Northwest Ski Extreme conference, due to a credit balance, so we entered a negative credit.

Enter a negative payment when money is not exchanged. In another example, a department transfer was issued (Figure 10-31).

Edit Payment [X]

Payment Amount
 Payment: Type:

Date, Account, and Receipt No.
 Date: Rcpt:

Account:

Building and Notes
 Credit No: Exp:

Notes:

Figure 10-30

Edit Payment [X]

Payment Amount
 Payment: Type:

Date, Account, and Receipt No.
 Date: Rcpt:

Account:

Building and Notes
 Credit No: Exp:

Notes:

Figure 10-31

Section 10: Billing

10.7 Charge Date Rules

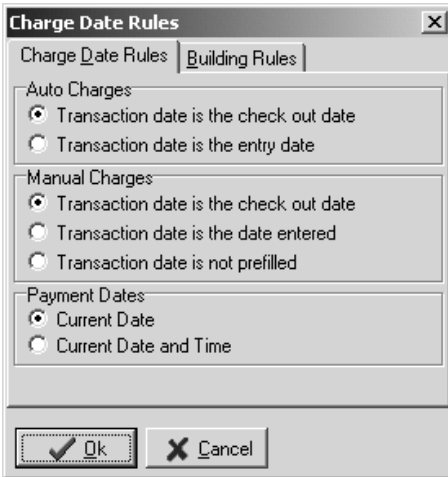


Figure 10-32

Date Rules

All charges and payments have a post date - the date which the charge or payment officially took place. You can configure Conference Programmer to automatically assign certain dates to charges or payments for you, to simplify data entry.

1. In the browse tree, expand Setup and click Charge Date Rules. The Charge Date Rules window will open (Figure 10-32).

2. In the Auto Charge area, select whether you want the post date of auto charges to be the check out date or the date the auto charge is calculated. If you select check out date, the post date for the auto charge will be the date that the conference, subgroup, or participant is set to check out (depending on whether the auto charge is for a conference, subgroup, or participant).

Auto charge post dates are automatically entered for you according to this rule, and are not changeable. You can change the rule and reapply the auto charge, but you cannot change the date of a specific auto charge.

3. In the Manual Charge area, select whether you want the post date of manually entered charges to be the check out date, the date the charge is created, or not prefilled. If you select check out date, the post date for the charge will be the date that the conference, subgroup, or participant is set to check out (depending on whether the charge is for a conference, subgroup, or participant).

The post date for manually entered charges will be automatically entered for you according to this rule, but you are able to change the date to any value when entering the charge information. If you choose the have the date not prefilled, the date field will be blank when you manually enter a charge - the date is a required field, however, so you will have to enter a date when you enter the rest of the charge information.

Section 10: Billing

4. In the Payment Dates area, select whether you want the post date of payments to be automatically entered as the current date or the current date and time.
5. Click the OK button to save your changes and close the Charge Date Rules window.

Building Rules

With all charges, you have the option of tracking the income by building. With manual charges, you can select the appropriate building in the Building field. With auto charges, you must have this rule set correctly.

1. In the browse tree, expand Setup and click Charge Date Rules. The Charge Date Rules window will open. Click on the Building Rules tab (Figure 10-32).
2. Select whether or not you want to include the building code on auto charges.

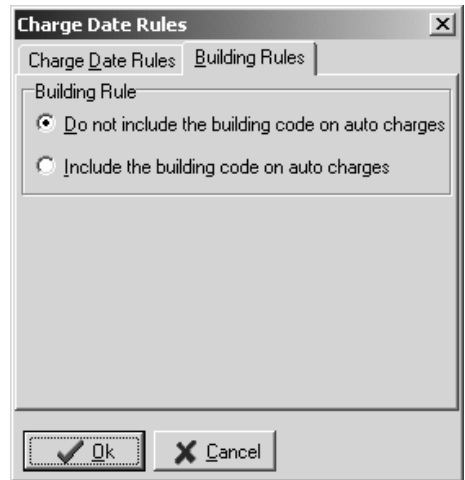


Figure 10-33

If you choose to include the building code on auto charges, the auto charges will be itemized by building. Figure 10-34 shows auto charges that have been itemized by building. The first charge is for all participant not assigned to a building, the second charge is for all participants in the North Tower, and the third charge is for all participants in the South Tower.

The screenshot shows the main interface of the CP 4.5 c/s software. The title bar reads "CP 4.5 c/s [Connection Info: LocalCP/so]". The menu bar includes "File", "Conference", "Tools", and "Function". Below the menu bar are buttons for "Add Payment", "Add Charge", "Action", "Previous", "Next", "Procedures", and "Locate". The main area is titled "Bankers Associations" and contains a tree view on the left with folders for "Conferences", "Subgroups/Participants", "Room Assignments", "Reports", and "Wizards". The right side of the window displays a table with columns for "Type/Trans #/User", "Payment", "Charge", "Date", "Description", and "Tax".

Type/Trans #/User	Payment	Charge	Date	Description	Tax
## # 2207 - rih	\$1,911.88		6/10/2000	Double Room Rate. 70 Nights @ \$23.75/Night.	PST & GST
## # 2208 - rih	\$163.88		6/10/2000	Double Room Rate. 6 Nights @ \$23.75/Night. North Tower.	PST & GST
## # 2209 - rih	\$2,403.50		6/10/2000	Double Room Rate. 88 Nights @ \$23.75/Night. South Tower.	PST & GST

Figure 10-34

Figure 10-35 shows auto charges for the same conference that were not itemized by building.

Section 10: Billing

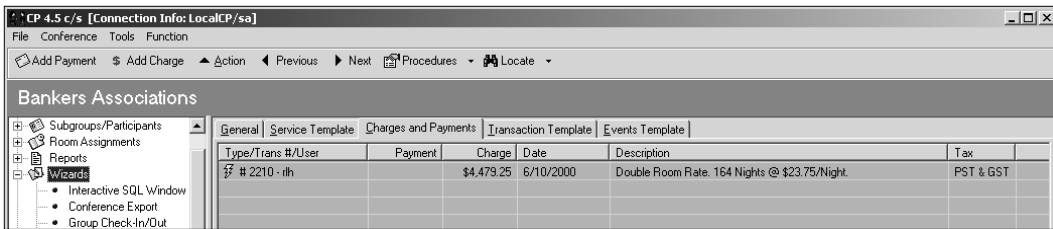


Figure 10-35

10.8 Set Cash Box

By default, every computer with Conference Programmer installed is configured to be in Cash Box 0 (zero). This means that all computers that act as a cash register - accepting any form of payment from participants - are acting as one cash register: Cash Box #0.

You can configure each computer to be its own Cash Box, or groups of computers to be one Cash Box. For example, if you have one computer at each of three front desks, and each one will be accepting payments, you can configure them as Cash Box #1, #2, and #3. You would then be able to reconcile the payments accepted at each computer separately. As another example, if you have three computers at each of three front desks, you can configure the three computers at the first front desk as Cash Box #1, the three computers at the second front desk as Cash Box #2, and the three computers at the third front desk as Cash Box #3. You would then be able to reconcile the payments accepted at each front desk separately, but you would not be able to reconcile the payments accepted at each computer separately.

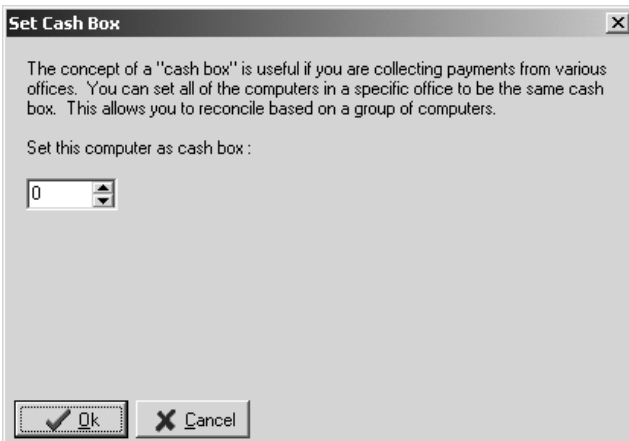


Figure 10-36

Make sure you are working on the computer you want to configure as a Cash Box. The Cash Box setting is per computer, not per user - every user that logs into Conference Programmer on a specific computer will be using it as the same Cash Box.

1. In the browse tree, expand Setup and click Set Cash Box. The Set Cash Box window will open (Figure 10-36).

2. Enter the number of the Cash Box you want this computer to be configured as. You can enter any number between 0 and 10,000.

Note: Do not use Cash Box #9999 - this is reserved for payments accepted via the Advanced Web Module.

3. Click the OK button to save your changes and close the window.

10.9 Reconciling Charges and Payments

Reconcile Payments Wizard

When you run the Reconcile Payments wizard, a report is generated that serves as documentation for all payments received since the wizard was previously run. This reconciliation report may be submitted along with the payments to the proper department, and serves as documentation for received payments.

Running this wizard will lock the payments, preventing anyone from editing or deleting them. This helps reduce accounting discrepancies between payments entered and payments received.

The Reconcile Payments wizard also tags payments with a deposit number. Each deposit number can be reviewed at anytime through a report or through the Reconcile Payments wizard.

1. In the browse tree, expand Wizards and click Reconcile Payments. The Reconcile Payments window will open (Figure 10-37).

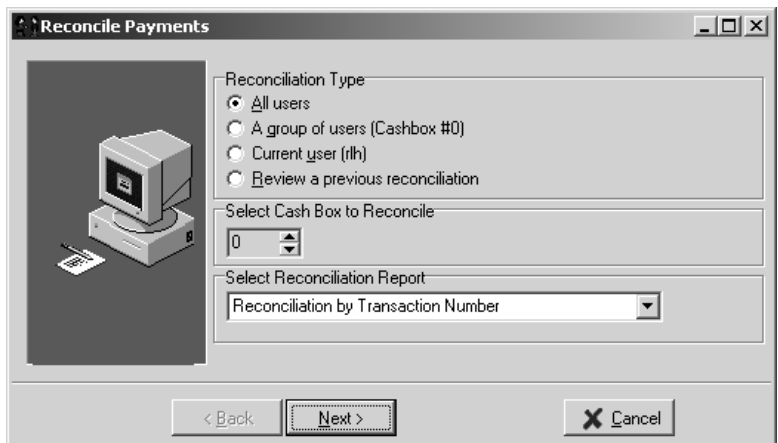


Figure 10-37

Section 10: Billing

2. Choose a Reconciliation Type.

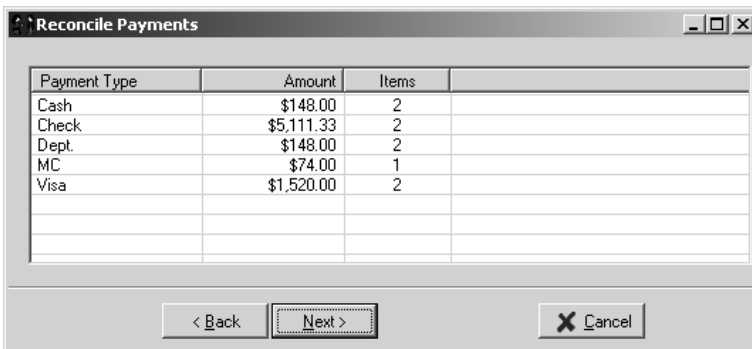
Select “All users” if you have one person responsible for the entire reconciliation process. When this option is selected all payments posted by all users will be reconciled. Usually, the person responsible for running the wizard also collects all payments, or is responsible for collecting all payments from all the other users. This person then submits the reconciliation report and all funds to the accounting department.

Select “A group of users (Cashbox #0)” if you configure your computers as cash boxes. You can reconcile all payments by all users that were logged onto a particular computer. Prior to using this method, you must set the computer you are running the wizard from as the cash box you want to reconcile (see Section 10.9: Set Cash Box).

Select “Current User (rlh)” to reconcile all payments received and posted by yourself; by the user currently logged in and running the wizard. The “rlh” in Figure 10-37 represents the initials of the user currently logged in. This method provides the most detailed reconciliation, however it is also the most difficult method to manage since it requires every user to run the wizard at the end of every shift. If any reconciliation is missed, it is very difficult to go back and reconcile the payments for that shift or user.

Select “Review a previous reconciliation” if you have already reconciled payments and you wish to review a specific deposit number.

Click the Next button. A summary of all new payments, posted since the Reconcile Payments wizard was last run, is displayed, categorized by payment type (Figure 10-38).



The screenshot shows a window titled "Reconcile Payments" with a table of payment data. The table has four columns: "Payment Type", "Amount", "Items", and an empty column. The data rows are as follows:

Payment Type	Amount	Items	
Cash	\$148.00	2	
Check	\$5,111.33	2	
Dept.	\$148.00	2	
MC	\$74.00	1	
Visa	\$1,520.00	2	

At the bottom of the window, there are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "X Cancel".

Figure 10-38

3. Click the Next button. A trial reconciliation report will be displayed (Figure 10-39).

Section 10: Billing

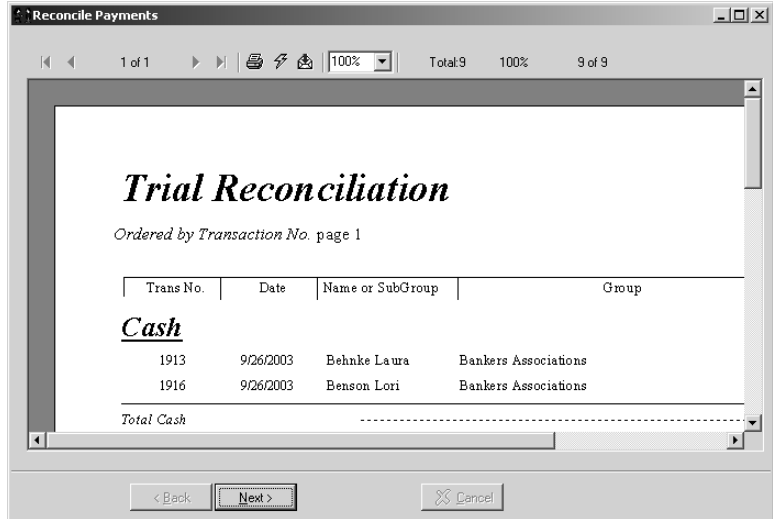


Figure 10-39

Review the report to ensure it's accuracy. You do not need to print it at this time, but it may help you reconcile the payments to have a paper report you can write on.

4. Click the Next button. Tag the records with a deposit number, by clicking the "Reconciled. Tag records now." checkbox (Figure 10-40). If you uncheck this box, the wizard will end and no payments will be reconciled.

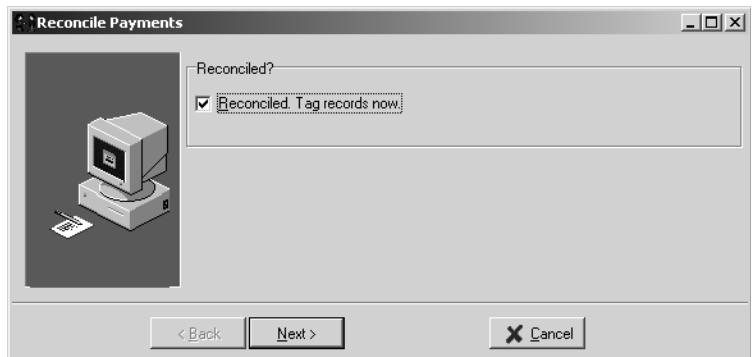


Figure 10-40

5. Click the Next button.
6. Click the OK button when the wizard tells you it has finished tagging the records (Figure 10-41).

Section 10: Billing

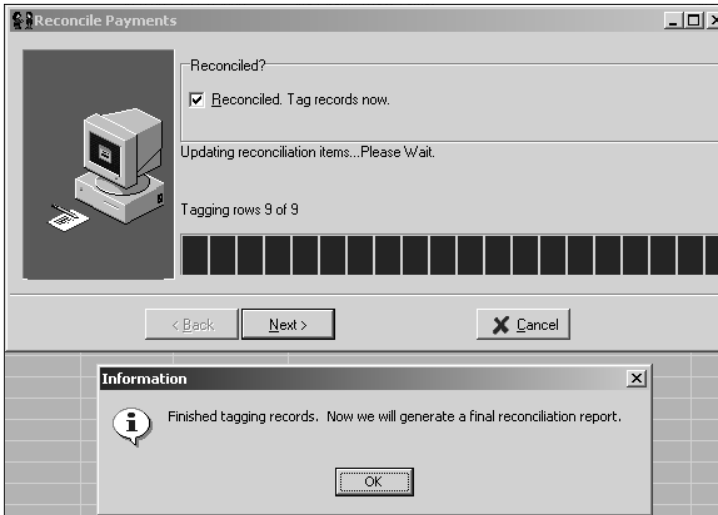


Figure 10-41

A final reconciliation report is displayed with a deposit number (Figure 10-42).

You should print this report by clicking the button with the printer icon on the top of the window - you will want to submit this report with your payments to the accounting department.

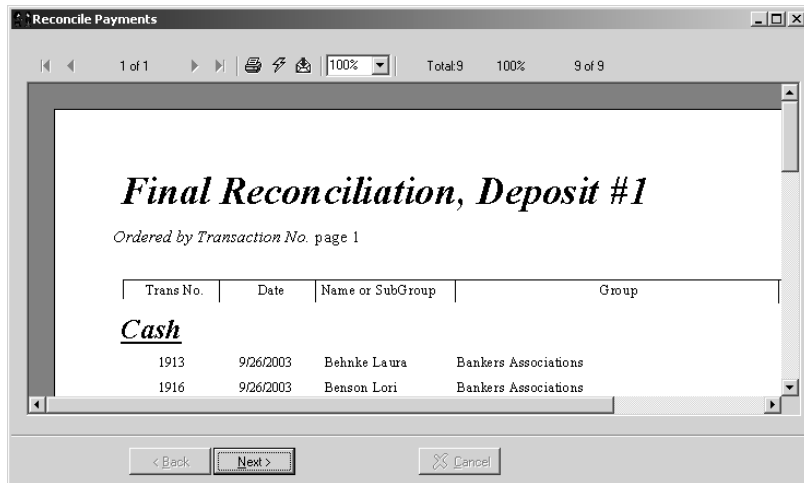


Figure 10-42

7. Click the Next button.

If you have been set up to export payments to an accounting program such as Great Plains or Banner, choose a file location by clicking the ellipsis button (the button with three dots on it), browsing to where you want to export the file, and clicking the OK button. Select the appropriate system to export to. In our example, we only have one choice: Great Plains (Figure 10-43).

Section 10: Billing

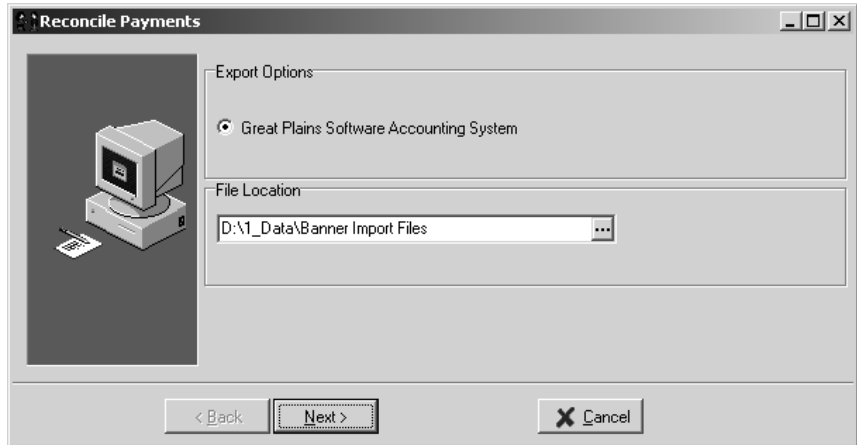


Figure 10-43

If you do not need to export payments to another system, click the Cancel button, then click the OK button when asked if you want to cancel the wizard - at this point, the payments are already reconciled, you are only cancelling the portion of the wizard that exports payments to another system.

8. Click the Next button to export the payments, then click the OK button when the wizard tells you it has successfully saved the file (Figure 10-44).

Figure 10-45 shows how payments appear after running the Reconcile Payments wizard. You can see that the payment icon now has a pad-lock, indicating the payment has been reconciled and locked.

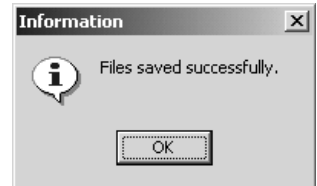


Figure 10-44



 # 1890 - rlh	\$1,500.00		9/25/2003	Payment. Visa.
 # 1923 - rlh	\$5,037.33		9/26/2003	Payment. Check.

Figure 10-45

Reviewing Deposits

There are two ways to review reconciled deposits. You can review a specific deposit through the Reconcile Payments wizard, or you can review a range of deposits through a report.

1. To review a specific deposit, in the browse tree, expand Wizards and click Reconcile Payments. The Reconcile Payments window will open.

Section 10: Billing

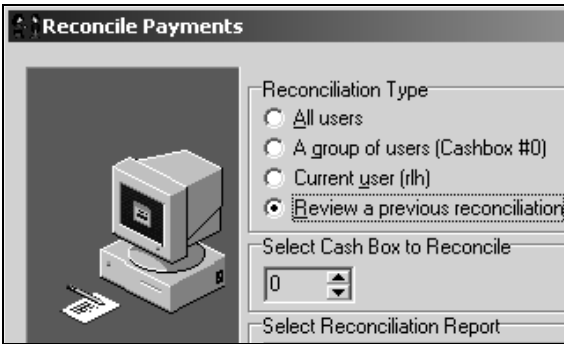


Figure 10-46

3. Select the deposit number you want to review, then Click the OK button. A final reconciliation report for the deposit chosen will be displayed (Figure 10-48).

2. Select “Review a previous reconciliation” (Figure 10-46) and click the Next button. A list of all previous deposits is displayed (Figure 10-47).

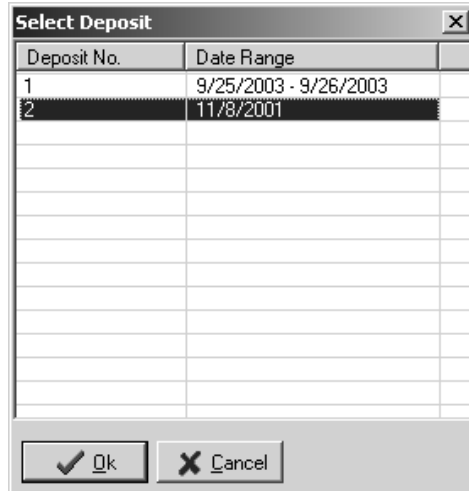


Figure 10-47

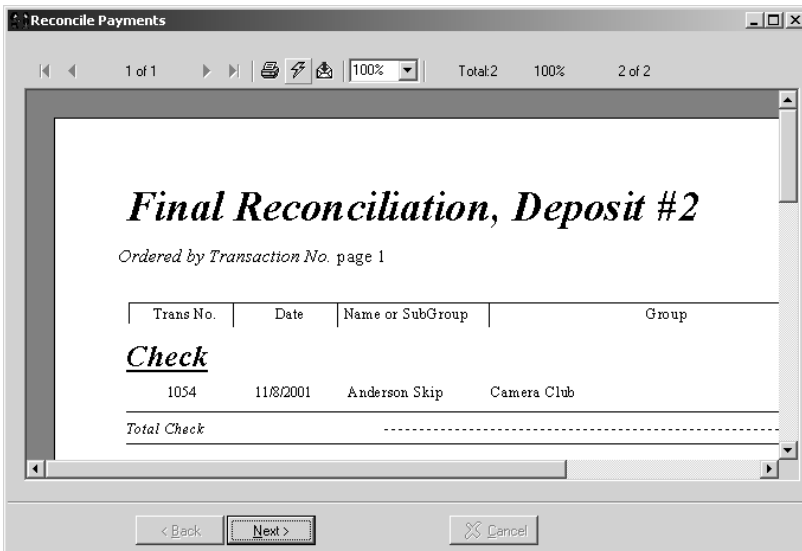


Figure 10-48

You can print this report by clicking the button with the printer icon on the top of the window.

4. Click the Next button, then click the Cancel button to exit the wizard.

Perhaps you are uncertain of which exact deposit number you want to review. You can use a report to locate a deposit.

1. View the “Payment Reconciliation by Deposit Number” report in report folder “(16) Summary Statistics” (report folder #16). This report is not filtered by a date range or conference so there are no filtering options to select (see Section 16.1: Viewing Reports). Click the Preview button on the toolbar. The Enter Parameter Values window will open (Figure 10-49).

Enter a range of deposit numbers in the “Start of range” and “End of range” fields. This will print all deposits within the range entered, including reconciled payments you have deposited and reconciled charges you have submitted.

In this example, we have selected “No lower Bound,” which means the report will display all deposits, from the very first through the deposit number you entered in the “End of range” field. Click the OK button to preview the report. You can print the report by clicking the button with the printer icon.

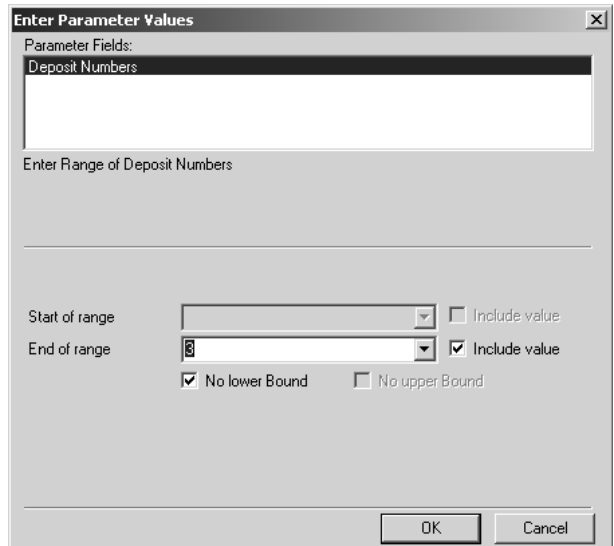


Figure 10-49

Reconcile Charges Wizard

When you run the Reconcile Charges wizard, a report is generated that serves as documentation for all charges posted since the wizard was previously run. This reconciliation report may be submitted to another department if, for example, you must reconcile the charges in Conference Programmer with those of an accounting department.

Running this wizard will lock the charges, preventing anyone from editing or deleting them - the locked charges will still be able to be reversed, in case something changes that makes the locked charge incorrect.

Section 10: Billing

The Reconcile Charges wizard also tags charges with a deposit number. Each deposit number can be reviewed at anytime through a report or through the Reconcile Charges wizard.

1. In the browse tree, expand Wizards and click Reconcile Charges. The Monthly Reporting window will open (Figure 10-50).



Figure 10-50

2. Choose a Selection Criteria, so the wizard can determine which charges it should reconcile.

Select "Up to this date" to reconcile all charges that were posted on or before the date, which you can specify, and that have not yet been reconciled. The next step of the wizard displays a summary of the charges to reconcile, grouped by account. Check the "Separate by month" checkbox to have the wizard further break down the charges by the months the charges were posted in, in addition to the account.

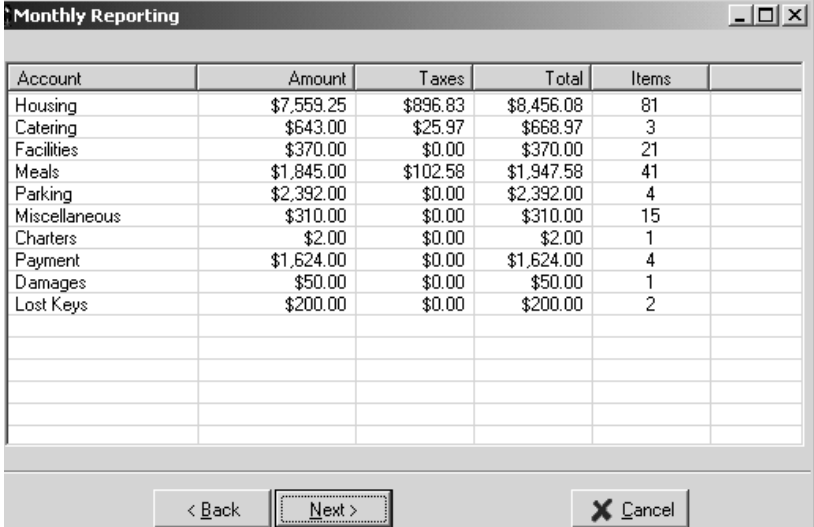
Select "Specific Month" to reconcile the charges that were posted in the month that you specify. To change the month, click on the month and type the first letter of the month you want. If you want another month that starts with the same letter, type the letter again. For example, type "M" if you want March, and type "M" again if you want "May." To change the year, click on the year and type the year you want.

Select "Selected Conference" to reconcile all charges for a specific conference, which you can specify.

Section 10: Billing

Select "Review a previous reconciliation" if you have already reconciled charges and you wish to review a specific deposit number.

Click the Next button. A summary of all new charges, posted since the Reconcile Charges wizard was last run, is displayed, categorized by account (Figure 10-51).

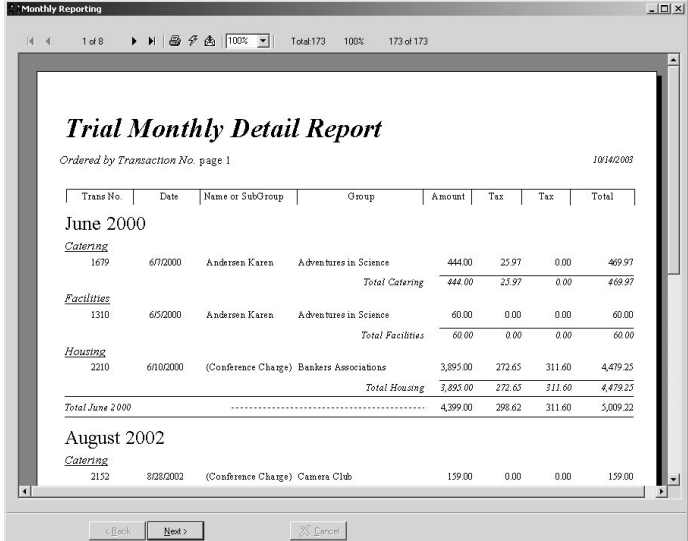


Account	Amount	Taxes	Total	Items
Housing	\$7,559.25	\$896.83	\$8,456.08	81
Catering	\$643.00	\$25.97	\$668.97	3
Facilities	\$370.00	\$0.00	\$370.00	21
Meals	\$1,845.00	\$102.58	\$1,947.58	41
Parking	\$2,392.00	\$0.00	\$2,392.00	4
Miscellaneous	\$310.00	\$0.00	\$310.00	15
Charters	\$2.00	\$0.00	\$2.00	1
Payment	\$1,624.00	\$0.00	\$1,624.00	4
Damages	\$50.00	\$0.00	\$50.00	1
Lost Keys	\$200.00	\$0.00	\$200.00	2

Figure 10-51

- Click the Next button. A trial reconciliation report will be displayed (Figure 10-52).

Review the report to ensure it's accuracy. You do not need to print it at this time, but it may help you reconcile the charges to have a paper report you can write on.



Trial Monthly Detail Report
 Ordered by Transaction No. page 1 10/14/2003

Trans No.	Date	Name or SubGroup	Group	Amount	Tax	Tax	Total
June 2000							
<i>Catering</i>							
1679	6/7/2000	Andersen Karen	Adventures in Science	444.00	25.97	0.00	469.97
				<i>Total Catering</i>	444.00	25.97	469.97
<i>Facilities</i>							
1310	6/5/2000	Andersen Karen	Adventures in Science	60.00	0.00	0.00	60.00
				<i>Total Facilities</i>	60.00	0.00	60.00
<i>Housing</i>							
2210	6/10/2000	(Conference Charge)	Bankers Associations	3,895.00	272.65	311.60	4,479.25
				<i>Total Housing</i>	3,895.00	272.65	4,479.25
Total June 2000				4,399.00	298.62	311.60	5,009.22
August 2002							
<i>Catering</i>							
2152	8/28/2002	(Conference Charge)	Camera Club	159.00	0.00	0.00	159.00

Figure 10-52

Section 10: Billing

- Click the Next button. Tag the records with a deposit number, by clicking the “Reconciled. Tag records now.” checkbox (Figure 10-53). If you uncheck this box, the wizard will end and no charges will be reconciled.



Figure 10-53

- Click the Next button.
- Click the OK button when the wizard tells you it has finished tagging the records (Figure 10-54).

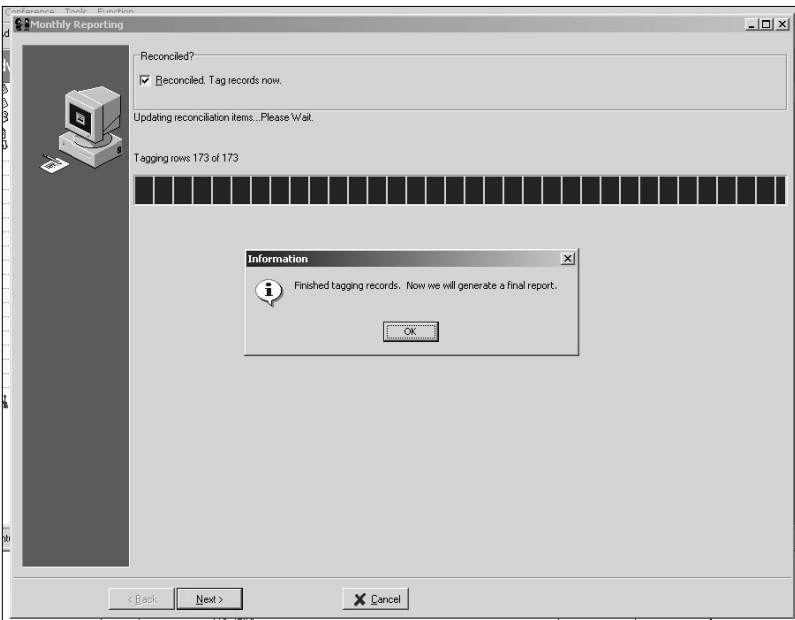


Figure 10-54

A final reconciliation report is displayed with a deposit number (Figure 10-55).

Section 10: Billing

Final Monthly Detail, ID #9
Ordered by Transaction No. page 1 10/14/2003

Trans No.	Date	Name or SubGroup	Group	Amount	Tax	Tax	Total	
June 2000								
<u>Catering</u>								
1679	6/7/2000	Andersen Karen	Adventures in Science	444.00	25.97	0.00	469.97	
				<i>Total Catering</i>	444.00	25.97	0.00	469.97
<u>Facilities</u>								
1310	6/5/2000	Andersen Karen	Adventures in Science	60.00	0.00	0.00	60.00	
				<i>Total Facilities</i>	60.00	0.00	60.00	
<u>Housing</u>								
2210	6/10/2000	(Conference Charge)	Bankers Associations	3,895.00	272.65	311.60	4,479.25	
				<i>Total Housing</i>	3,895.00	272.65	311.60	4,479.25
Total June 2000				4,399.00	298.62	311.60	5,009.22	
August 2002								
<u>Catering</u>								
2152	8/28/2002	(Conference Charge)	Camera Club	159.00	0.00	0.00	159.00	
2153	8/28/2002	aa aaz	Camera Club	40.00	0.00	0.00	40.00	
				<i>Total Catering</i>	199.00	0.00	199.00	
<u>Facilities</u>								

Figure 10-55

You should print this report by clicking the button with the printer icon on the top of the window - you will want to submit this report to the appropriate accounting department.

7. Click the Next button.

If you have been set up to export charges to an accounting program such as Great Plains or Banner, choose a file location by clicking the ellipsis button (the button with three dots on it), browsing to where you want to export the file, and clicking the OK button. Select the appropriate system to export to. In our example, we only have one choice: Great Plains (Figure 10-56).

If you do not need to export charges to another system, click the Cancel button, then click the OK button when asked if you want to cancel the wizard - at this point, the charges are already reconciled, you are only cancelling the portion of the wizard that exports charges to another system.

8. Click the Next button to export the charges, then click the OK button when the wizard tells you it has successfully saved the file (Figure 10-57).

Section 10: Billing

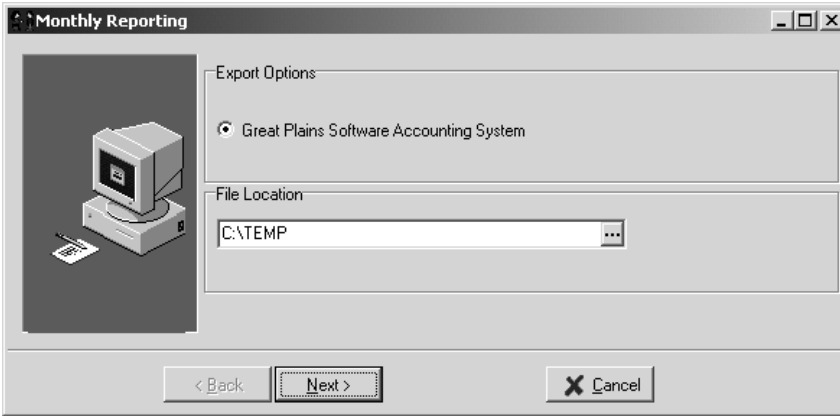


Figure 10-56

Figure 10-58 shows how charges appear after running the Reconcile Charges wizard. You can see that the charge icon is now a pad-lock, indicating the charge has been reconciled and locked.

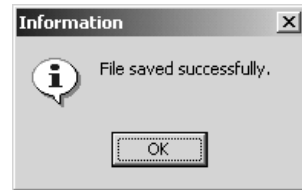


Figure 10-57

# 905 - sa	\$13,789.00	8/28/2002	Housing.
# 2152 - rlh	\$159.00	8/28/2002	Catering. 53 Days @ \$3.00/Day.

Figure 10-58

Reviewing Previously Reconcile Charges

There are two ways to review previously reconciled charges. You can review a specific deposit through the Reconcile Payments wizard, or you can review a range of deposits through a report.

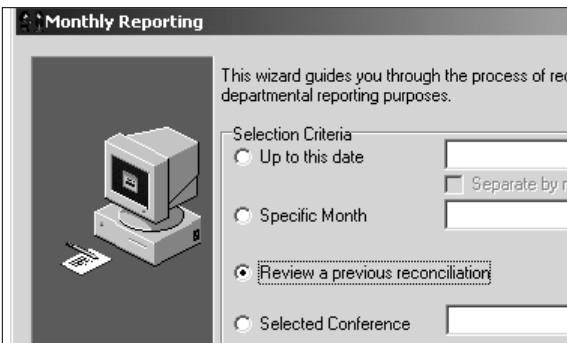


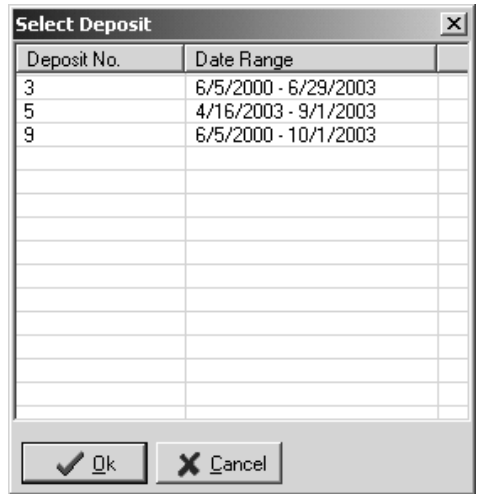
Figure 10-59

1. To review a specific deposit, in the browse tree, expand Wizards and click Reconcile Payments. The Reconcile Payments window will open.
2. Select "Review a previous reconciliation" (Figure 10-59) and click the Next button. A list of all previous deposits is displayed (Figure 10-60).

Section 10: Billing

3. Select the deposit number you want to review, then Click the OK button. A final reconciliation report for the deposit chosen will be displayed (Figure 10-61).

You can print this report by clicking the button with the printer icon on the top of the window.

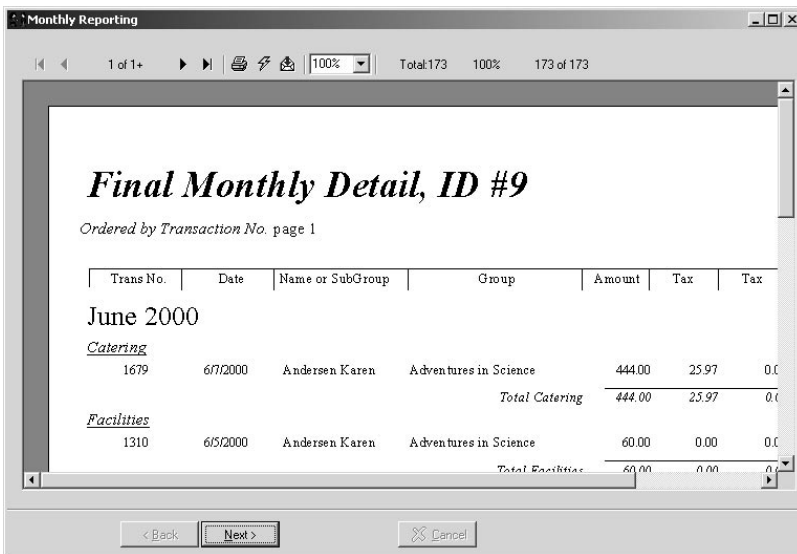


A dialog box titled "Select Deposit" with a close button (X). It contains a table with columns "Deposit No." and "Date Range".

Deposit No.	Date Range
3	6/5/2000 - 6/29/2003
5	4/16/2003 - 9/1/2003
9	6/5/2000 - 10/1/2003

At the bottom, there are two buttons: "Ok" (with a checkmark icon) and "Cancel" (with an X icon).

Figure 10-60



A window titled "Monthly Reporting" showing a reconciliation report. The window has a toolbar with navigation and printing icons, a zoom dropdown set to 100%, and status information: "Total: 173 100% 173 of 173".

The report title is **Final Monthly Detail, ID #9**, followed by "Ordered by Transaction No. page 1".

Trans No.	Date	Name or SubGroup	Group	Amount	Tax	Tax
June 2000						
<u>Catering</u>						
1679	6/7/2000	Andersen Karen	Adventures in Science	444.00	25.97	0.00
Total Catering				444.00	25.97	0.00
<u>Facilities</u>						
1310	6/5/2000	Andersen Karen	Adventures in Science	60.00	0.00	0.00
Total Facilities				60.00	0.00	0.00

At the bottom, there are three buttons: "< Back", "Next >" (highlighted), and "Cancel".

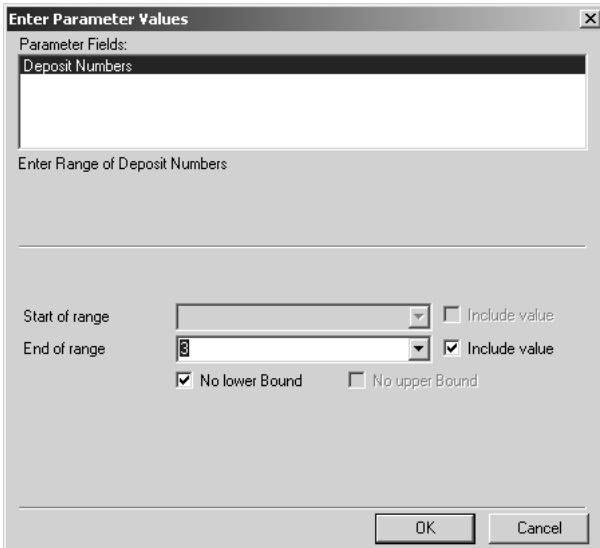
Figure 10-61

4. Click the Next button, then click the Cancel button to exit the wizard.

Perhaps you are uncertain of which exact deposit number you want to review. You can use a report to locate a deposit.

Section 10: Billing

1. View the “Charge Reconciliation by Deposit Number” report in report folder “(16) Summary Statistics” (report folder #16). This report is not filtered by a date range or conference so there are no filtering options to select (see Section 16.1: Viewing Reports). Click the Preview button on the toolbar. The Enter Parameter Values window will open (Figure 10-62).



Enter Parameter Values

Parameter Fields:
Deposit Numbers

Enter Range of Deposit Numbers

Start of range [] Include value

End of range [8] Include value

No lower Bound No upper Bound

OK Cancel

Figure 10-62

Enter a range of deposit numbers in the “Start of range” and “End of range” fields. This will print all deposits within the range entered, including reconciled payments you have deposited and reconciled charges you have submitted.

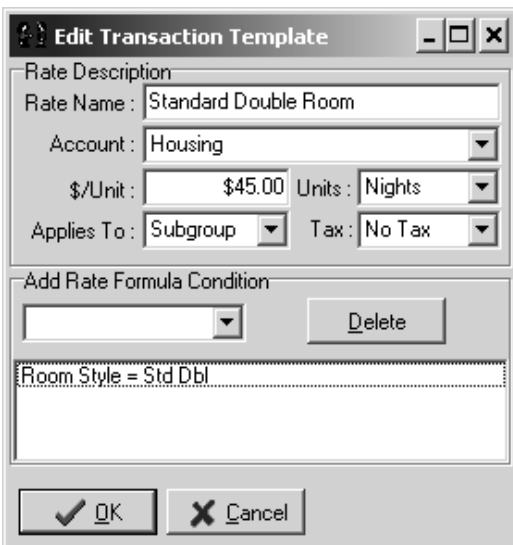
In this example, we have selected “No lower Bound,” which means the report will display all deposits, from the very first through the deposit number you entered in the “End of range” field. Click the OK button to preview the report. You can print the report by clicking the button with the printer icon.

Section 11: Hotel Guest Wizard

11 Hotel Guest Wizard

The Hotel Guest functionality is used to handle walk-in guests or individuals calling to reserve rooms independent of any specific conference. Generally, this functionality is only used by Conference Centers that, in addition to their conference business, operate as a hotel. The Hotel Guest wizard allows users to charge per room, rather than per bed per guest which is the general practice with Conference Programmer.

Prior to using the Hotel Guest wizard you must first create a "Hotel" conference. In this example we have named it "Hotel." The date range of the conference should be the length of time you operate as a hotel, for the current year. The transaction template for the hotel conference is slightly different than for other conferences. We recommend using the Room Style field to build the rate conditions, instead of the Room Type field, which you may be used to (Figure 11-1).



Edit Transaction Template

Rate Description

Rate Name: Standard Double Room

Account: Housing

\$/Unit: \$45.00 Units: Nights

Applies To: Subgroup Tax: No Tax

Add Rate Formula Condition

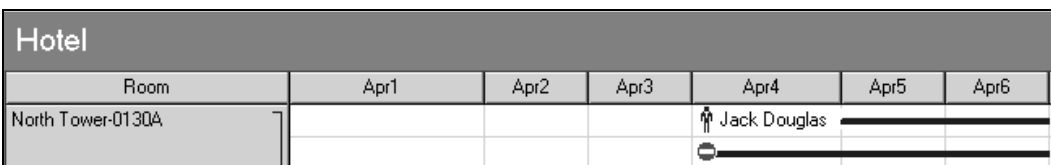
Room Style = Std Dbl

OK Cancel

Figure 11-1

Notice that the charge is applied to the subgroup. This is important: Using the Hotel Guest wizard will create a subgroup and apply charges to the subgroup.

We use Room Style in the rate condition since, by default, participants entered via the Hotel Guest wizard will be assigned a Room Type of "Single." We assign a Room Type of Single so, while in the reservation calendar, the other available beds in the room become offline, thus preventing other room assignments and/or double-booking the room (Figure 11-2).



Hotel						
Room	Apr1	Apr2	Apr3	Apr4	Apr5	Apr6
North Tower-0130A				↑ Jack Douglas	↓	

Figure 11-2

Section 11: Hotel Guest Wizard

11.1 Booking a Room Via the Hotel Guest Wizard

Unlike other conferences, it is not necessary to select the Hotel conference to make a reservation. For example, you may be working with the “Adventures in Science” conference when someone calls, wanting to reserve a room for the “Hotel” conference. You can start the Hotel Guest wizard while still working with the “Adventures in Science” conference.

You must, however, be viewing one of the many screens in which the Procedures button is available on the toolbar.

1. Click the Procedures button on the toolbar and select Hotel Guest, or hold the Control key on the keyboard down and press the “L” key, to launch the wizard. The Hotel Guest window will open (Figure 11-3).

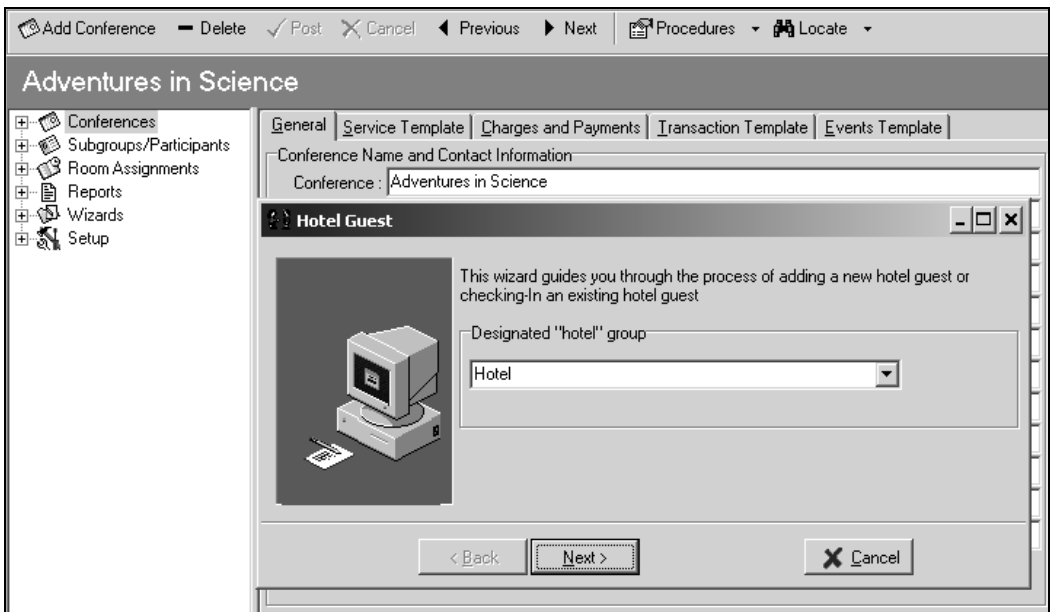


Figure 11-3

2. Select the correct conference from the drop down menu. In this example, we selected our “Hotel” conference. Click the Next button.
3. By default, “<Add new registration>” is selected as the Primary Contact (Figure 11-4). “Do not check them in or out” is selected, since the guest is likely on the phone making the reservation and not actually checking in. If your guest is checking in at the time of

Section 11: Hotel Guest Wizard



Figure 11-4

booking, select “Check them in now.” Since you do not have your guest’s name at this point, leave “Add new registration” displayed as the Primary Contact. Click the Next button (Figure 11-5).

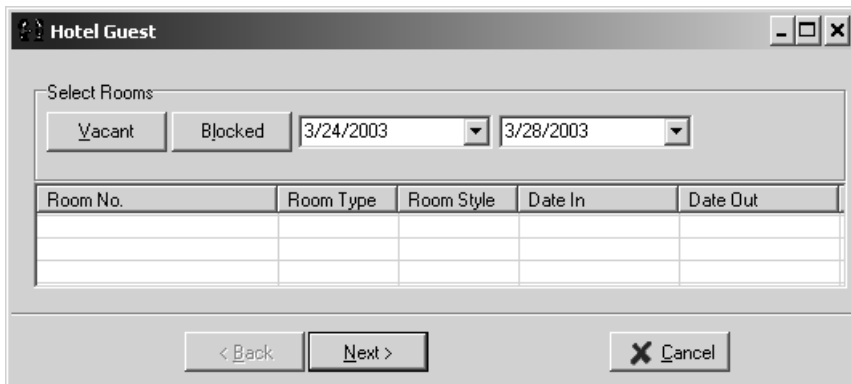


Figure 11-5

4. Enter the check in and check out dates that the guest wishes to reserve. If the guest is checking in at the time of the booking, the first date (the current date) will be displayed in gray, and will be unchangeable. Once the dates have been set, click the Vacant button to select a vacant room to assign to the guest. If you blocked rooms for your “Hotel” conference in advance, you can click the Blocked button, instead of the Vacant button, to select one of the blocked rooms to assign to the participant.

The Find Vacant Room (or the Find Blocked Room) window will open (Figure 11-6). Select the building you would like to assign the guest to and click the Refresh button. A list of available rooms will appear. The rooms displayed are the rooms available in this building, for the selected dates. A red “X” displayed next to a room indicates it has not been marked as clean (see Section 17.11: Mark Rooms Cleaned Wizard).

Section 11: Hotel Guest Wizard

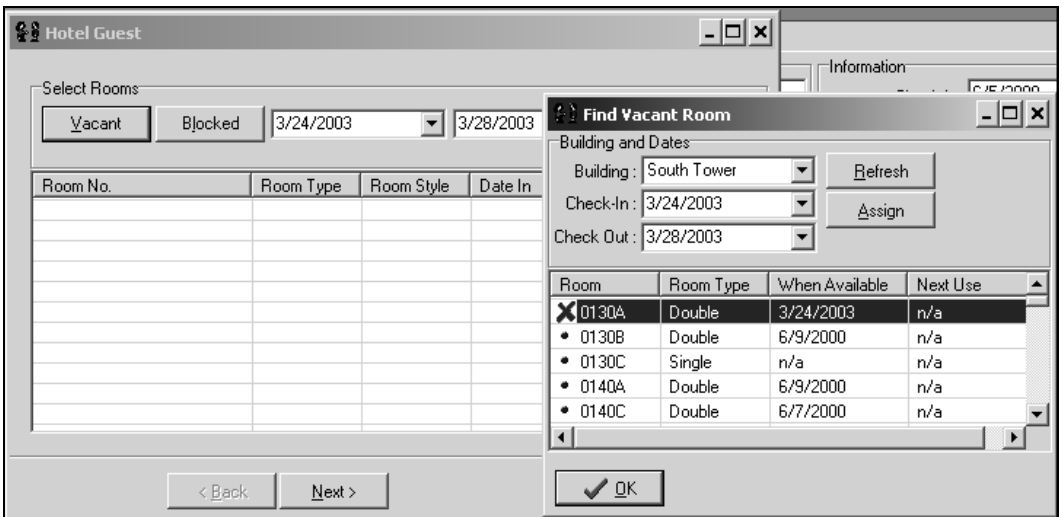


Figure 11-6

Click on the desired room and click the Assign button, or double-click on the desired room. If the guest is booking more than one room, continue to assign them all room now. Click the OK button to close the Find Vacant Rooms window. Click the Next button (Figure 11-7).

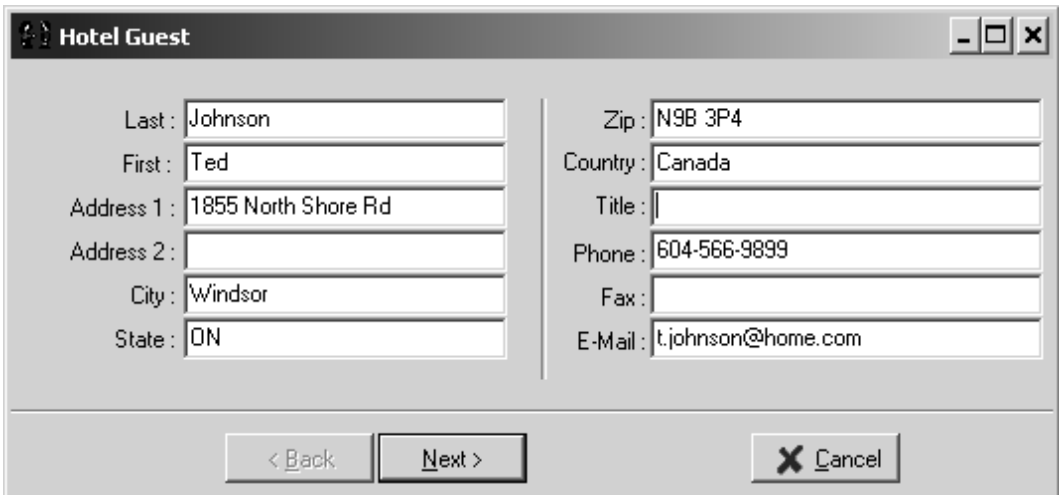


Figure 11-7

5. Enter the guest's contact information. Gather as much information as possible, including their email address. This will allow you to email an invoice and/or a confirmation directly from the Hotel Guest wizard. Click the Next button (Figure 11-8).

Section 11: Hotel Guest Wizard

Guests	Room Assignment	Room Type	Room Style
Ted Johnson	South Tower 0140A	Double	Std Dbl
Ted Johnson	South Tower 0140C	Double	Std Dbl

Figure 11-8

- In this example, we have assigned Ted Johnson 2 rooms. Since he is the guest making the reservation, the Hotel Guest wizard automatically creates two guests, 1 name for each room. At this point, if you do not need to record the other guests names (the recommended approach), click the Next button. If you want to record the other guests' names, click on one of the names listed and click the +Guest button, or double-click on one of the names listed, to open a blank Participant Information window (Figure 11-9). Enter the other guest's contact information here, then click the OK button to close the Participant information window. Click the Next button.

Contact Information		Arrival and Assignments	
Last :	Johnson	Building :	South Tower
First :	Ted	Rm :	0140A
Gender :			
Age :			

Figure 11-9

The guest's charges will be calculated (Figure 11-10). Since your guest is most likely on the phone or standing at your desk, ensure these charges are acceptable. If they are not, click the Cancel button to cancel the Hotel Guest wizard and begin again with updated information from the guest. If the charges are acceptable, click the Next button.

Section 11: Hotel Guest Wizard



Figure 11-10

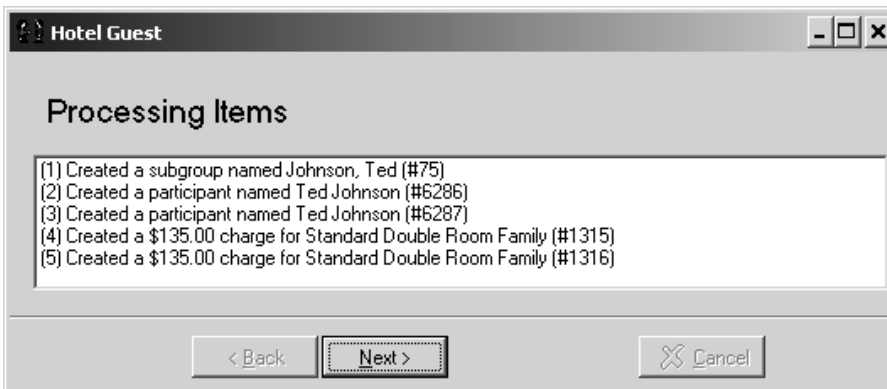


Figure 11-11

The Hotel Guest wizard will create a subgroup for the guest, add room placeholders to the subgroup in the guest's name, and charge the subgroup for the room(s) chosen (Figure 11-11).

7. Click the Next button (Figure 11-12).

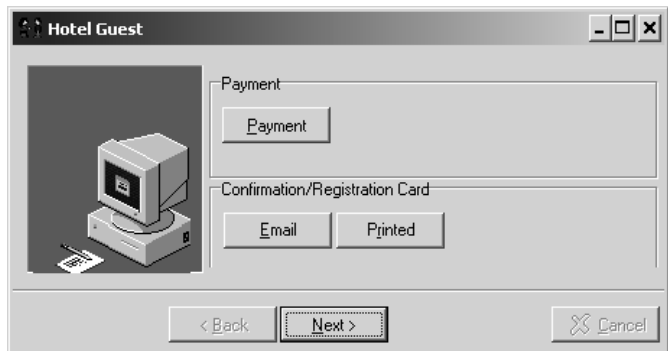


Figure 11-12

Section 11: Hotel Guest Wizard

New Subgroup Payment

Payment Amount
Payment: \$270.00 Type: Visa

Date, Account, and Receipt No.
Date: 3/21/2003 Rcpt: Account: Payment

Building and Notes
CC No: Exp: Notes:

OK Cancel

Figure 11-13

8. If you are accepting a payment from the guest at this time, click the Payment button. The total of the guest's charges will be displayed (Figure 11-13) - you can edit this amount if your guest is not planning to pay the entire balance. Select the payment Type and enter any other information you require, such as credit card number and expiration date, or notes about the payment. Click the OK button.
9. If you have the guest's email address, you can email them a confirmation with their account activity by clicking the Email button (see Section 17.14: Email). If you want to print an invoice now, click the Print button (see Section 16.1: Viewing Reports).

10. Click the Next button to exit the Hotel Guest wizard.

Hotel Guest Wizard Review

To review what occurred in the previous example, select the "Hotel" conference and expand Subgroups/Participants in the browse tree (Figure 11-14).

CP 4.5 c/s [Connection Info: CPDEMO/sa]

File Subgroups Tools Function

Add Subgroup Delete Post Cancel Previous Next Procedures

Hotel

- Conferences
- Subgroups/Participants
 - Douglas, Jack
 - Johnson, Ted
 - Johnson, Ted
 - Johnson, Ted
- Room Assignments
- Reports
- Wizards
- Setup

General Charges and Payments

Subgroup #70

Subgroup: Johnson, Ted

Last: Johnson

First: Ted

Address 1: 1855 North Shore Rd

Address 2:

City: Windsor

Figure 11-14

Section 11: Hotel Guest Wizard

Hotel Guest Subgroups

When you run the Hotel Guest wizard you are actually creating a subgroup. The number of participants entered is based upon the number of rooms reserved. In the example above, a subgroup called “Johnson, Ted” was created. Since Ted Johnson wanted 2 rooms, 2 participants were created, each of them called Ted Johnson, and each of them assigned to one room. To edit the names of the guests occupying the rooms, click on the participant, click the General tab, and change their first and last name and any other information you want.

Hotel Guest Room Types

When a room or rooms are reserved via the Hotel Guest wizard, a placeholder for each room is created in the name of the person reserving the room. Each placeholder is assigned a room type of Single. This is displayed in the Reservation Calendar (Figure 11-15).

Ted Johnson						
Room	Mar23	Mar24	Mar25	Mar26	Mar27	
South Tower-0130C						
South Tower-0140A		Ted Johnson	Ted Johnson			
South Tower-0140C		Ted Johnson	Ted Johnson			

Figure 11-15

Because the participants' Room Types were set to Single, the other beds in their rooms are taken offline. This eliminates the possibility of accidentally double-booking the room or making a room assignment in this room for a different conference.

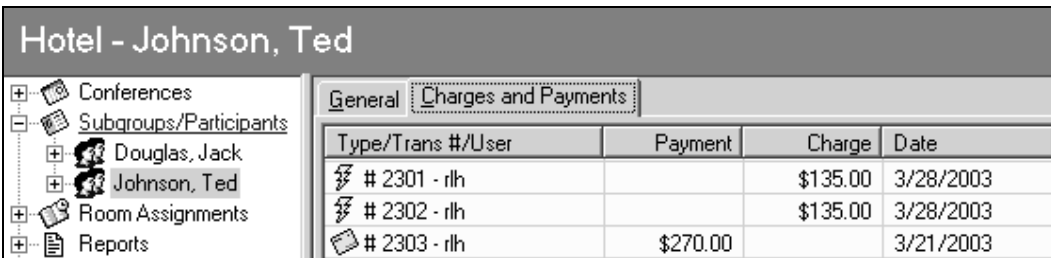
Hotel Guest Charges and Payments

To review the financial transactions, click the name of the Subgroup in the browse tree and click the Charges and Payments tab (Figure 11-16).

You can add more charges and payments to the specific subgroup by click the Add Payment or Add Charge buttons on the toolbar, respectively.

To print the bill for the subgroup, click the Subgroup Report button on the toolbar and select “Subgroup Billing” (see Section 16.1: Viewing Reports).

Section 11: Hotel Guest Wizard



The screenshot shows the 'Hotel - Johnson, Ted' window. On the left is a tree view with 'Conferences' expanded to show 'Subgroups/Participants', which includes 'Douglas, Jack', 'Johnson, Ted', 'Room Assignments', and 'Reports'. On the right, the 'Charges and Payments' tab is active, displaying a table with the following data:

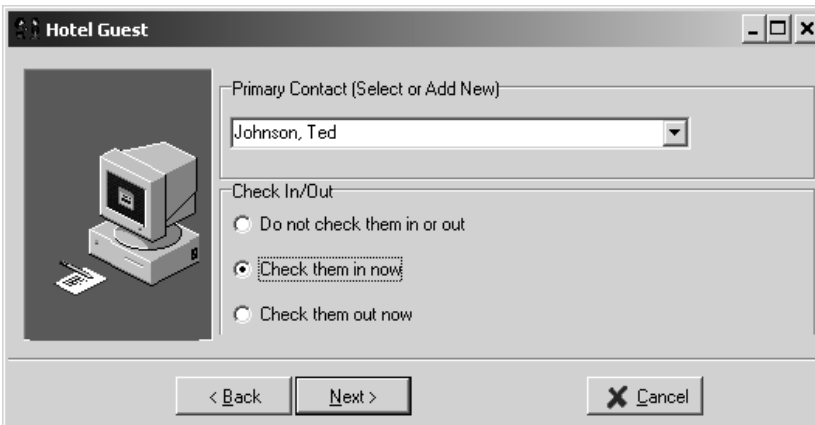
Type/Trans #/User	Payment	Charge	Date
# 2301 - rlh		\$135.00	3/28/2003
# 2302 - rlh		\$135.00	3/28/2003
# 2303 - rlh	\$270.00		3/21/2003

Figure 11-16

11.2 Checking In Hotel Guests

When hotel guests arrive, you can check them in via the Hotel Guest wizard. Just as with reserving rooms with the Hotel Guest wizard, it is not necessary to select the “Hotel” conference first. You can click the Procedures button on the toolbar and select Hotel Guest, or hold the Control key on the keyboard down while pressing the “L” key, while working with another conference.

1. Run the Hotel Guest wizard, select the “Hotel” conference, and click the Next button (Figure 11-17).



The 'Hotel Guest' dialog box features a computer icon on the left. The 'Primary Contact (Select or Add New)' field contains a dropdown menu with 'Johnson, Ted' selected. The 'Check In/Out' section has three radio buttons: 'Do not check them in or out', 'Check them in now' (which is selected), and 'Check them out now'. At the bottom, there are buttons for '< Back', 'Next >', and 'X Cancel'.

Figure 11-17

To check the guests in, you must determine the name the rooms were reserved under. Much like a hotel, the first person to arrive may not be the person that made the reservation.

2. Scroll through the names in the Primary Contact field until you find the correct one. This list contains the names of all the subgroups in the conference.

Section 11: Hotel Guest Wizard

3. Select “Check them in now” and click the Next button. The Check-In Options window will open (Figure 11-18).

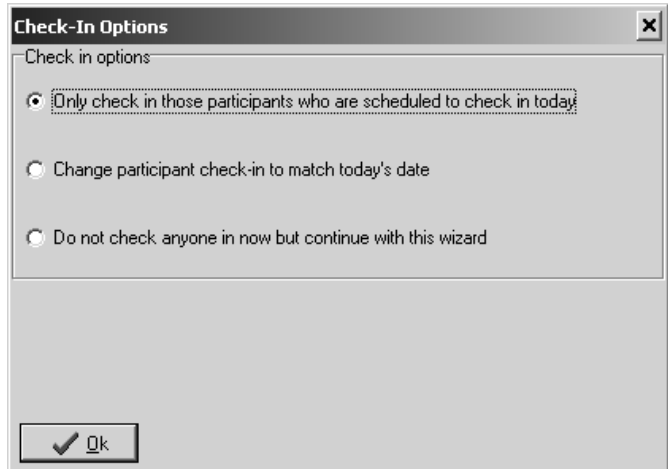


Figure 11-18

4. Select the appropriate check-in method. This is important to ensure proper billing.

In most cases you will select the first option, “Only check in those participants who are scheduled to check in today.” It is common that the reservations are made in advance, and the participants are not checked in at that time. Then, when the participants arrive at the front desk to check in, the Hotel Guest wizard is run again to check them in, and “Only check in those participants who are scheduled to check in today” is selected. The participants already have check-in dates associated with them; those participants who have a check-in date the same as the date the wizard is being run will be checked in.

In some cases the guest may show up earlier or later than their reservation’s check-in date. If so, you can select the second option, “Change participant check-in to match today’s date.” This will change the check-in date of all the participants in this subgroup to today’s date.

If you accidentally selected “Check them in now” in step 3, you can select the third option, “Do not check anyone in now but continue with this wizard.”

Note: The charges for the room are based on the dates of the participants: It is important to correctly manage the check-in dates.

5. Click the OK button (Figure 11-19).

Section 11: Hotel Guest Wizard

Hotel Guest

Add, Update Guests

+ Guest Add Room

Guests	Room Assignment	Room Type	Room Style
Ted Johnson	South Tower 0140A	Single	Std Dbl
Ted Johnson	South Tower 0140C	Single	Std Dbl

< Back Next > X Cancel

Figure 11-19

A list of the guests you are checking in is displayed, as well as which rooms they are in.

6. Click the Next button (Figure 11-20).

Hotel Guest

Charges and Payments

Type/Trans #/User	Payment	Charge	Date	Description
<input checked="" type="checkbox"/> # 2301 - rth		\$135.00	3/28/2003	Standard Double Roc
<input checked="" type="checkbox"/> # 2302 - rth		\$135.00	3/28/2003	Standard Double Roc
<input checked="" type="checkbox"/> # 2303 - rth	\$270.00		3/21/2003	Payment. Visa.

No Balance Clear All

< Back Next > X Cancel

Figure 11-20

The current charges and payments are displayed. In this example, we have previously collected and posted the balance due. If no payment had been taken during the initial registration process, a balance due would be displayed now. If a balance is due you may wish to collect payment for the amount due at this point. You will be given the opportunity do collect a payment in the next steps of the wizard.

Section 11: Hotel Guest Wizard

- Click the Next button (Figure 11-21).

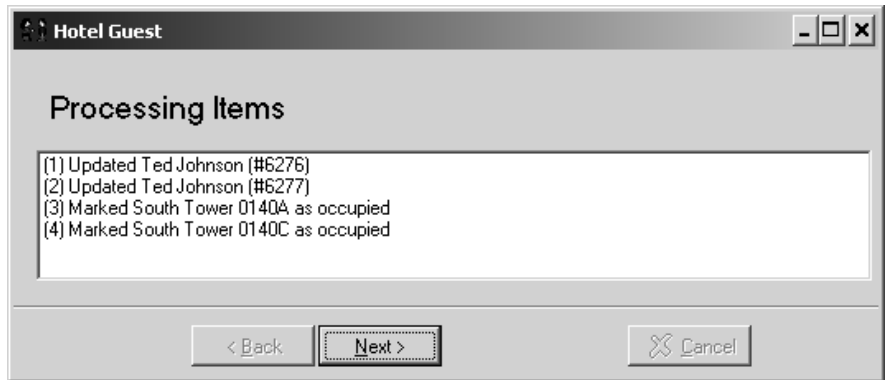


Figure 11-21

A list of the processes the wizard has completed is shown.

- Click the Next button (Figure 11-22).

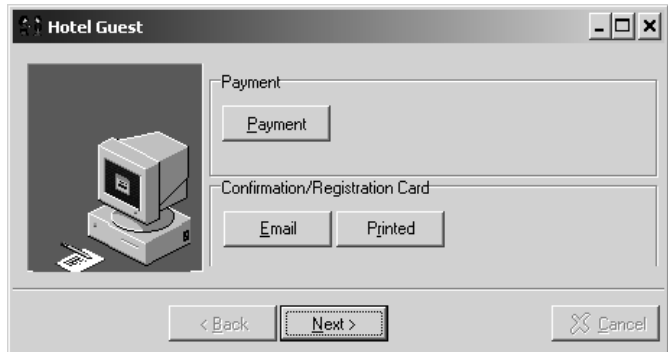
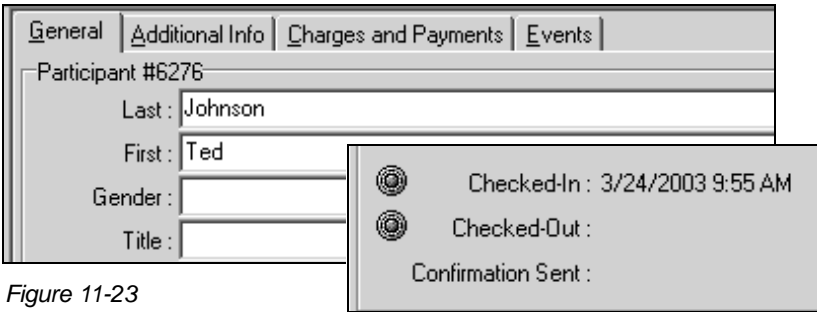


Figure 11-22

- If you are accepting a payment from the guest at this time, click the Payment button. The total of the guest's charges will be displayed - you can edit this amount if your guest is not planning to pay the entire balance. Select the payment Type and enter any other information you require, such as credit card number and expiration date, or notes about the payment. Click the OK button.
- If you have the guest's email address, you can email them a confirmation with their account activity by clicking the Email button (see Section 17.14: Email). If you want to print an invoice now, click the Print button (see Section 16.1: Viewing Reports).

Section 11: Hotel Guest Wizard

Your guests' records are now updated to indicate the guests have checked-in. To see the results of the check in process, select the "Hotel" conference, expand the subgroup you just checked in, click one of the participants, and click the General tab. You will see they have been marked "Checked In" (Figure 11-23).



The screenshot displays a software interface with a tabbed menu at the top containing 'General', 'Additional Info', 'Charges and Payments', and 'Events'. The 'General' tab is selected. Below the tabs, the text 'Participant #6276' is shown. The form contains the following fields: 'Last' with the value 'Johnson', 'First' with the value 'Ted', 'Gender' (empty), and 'Title' (empty). A pop-up window is overlaid on the right side of the form, containing the following information: a circular icon, 'Checked-In : 3/24/2003 9:55 AM', another circular icon, 'Checked-Out :', and 'Confirmation Sent :'. The pop-up window has a light gray background and a dark border.

Figure 11-23

11. Click the Next button to exit the Hotel Guest wizard.

Section 12: Contracts

12 Contracts

Conference Programmer has the ability to merge information in the database into a contract that you can give to your customers. The same functionality can be used slightly differently as a repository for notes about the conference that can be shared with your staff.

You can add, edit, or delete categories at any time, but you must set up at least one Contract Category before you can use the contract functionality.

12.1 Adding, Editing, and Deleting Contract Categories

Add a Contract Category

1. In the browse tree, expand Setup and click Contract Categories. The Contract Categories window will open (Figure 12-1).
2. Click the Add button. The Category window will open (Figure 12-2).

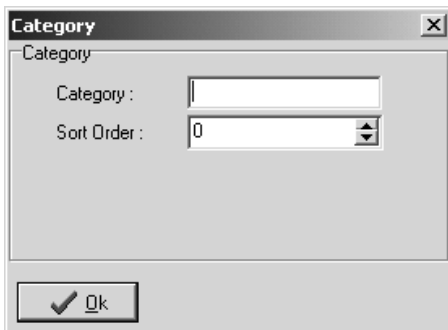


Figure 12-2

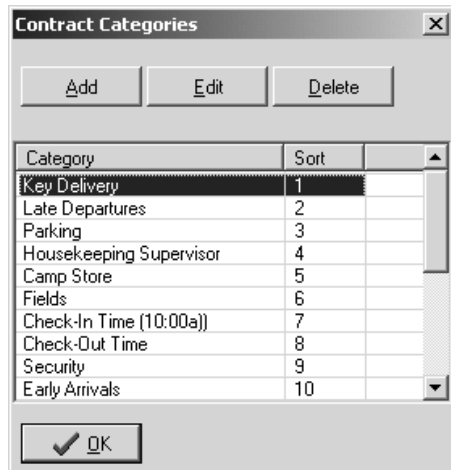


Figure 12-1

3. In the Category field, type a brief name for this category that will explain what information it should contain.

Set the sort field to list the category in the order you want (see Section 1.11: Sort Fields).

4. Click the OK button.

Edit or Delete a Contract and Reminder Category

1. In the browse tree, expand Setup and click Contract Categories. The Contract Categories window will open (Figure 12-1).
2. To Edit a category, click on the name of that category and click the Edit button. The Category window will open (Figure 12-2). Change the appropriate information and click the OK button.
3. To Delete a category, click on the name of that category and click the Delete button.

12.2 Adding, Editing, and Deleting Contract Items

Add a Contract Item

Contract items are the information stored in each contract category. This information can be merged into your contract, or can be used as notes about the conference to be shared with your staff.

Make sure you are working with the conference for which you want to add contract items.

1. In the browse tree, expand Conferences and click Contracts. The Contract Categories will appear in the main portion of the window (Figure 12-3).
2. Click the name of the contract item you want to enter information in and click the Add button on the toolbar, or right-click the name of the contract item and select Add. The Enter window will open (Figure 12-4).

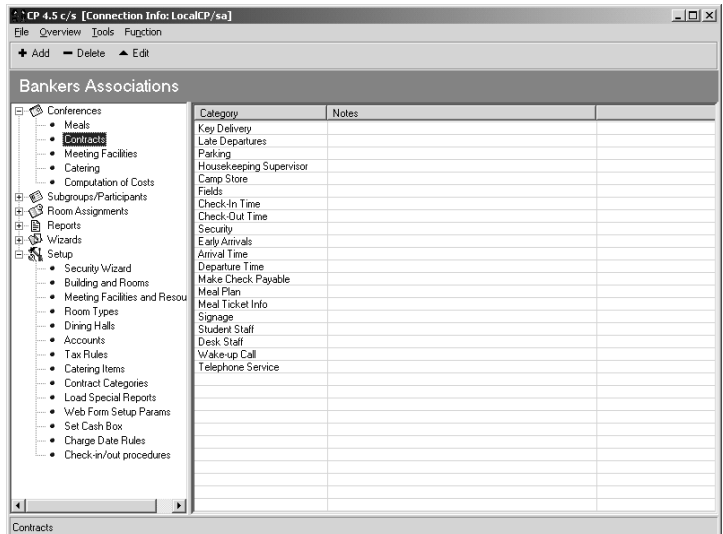


Figure 12-3

Section 12: Contracts

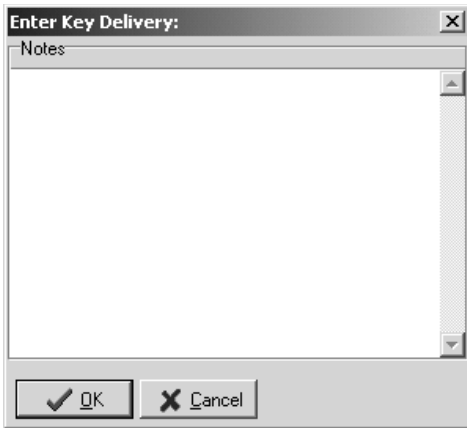


Figure 12-4

Edit or Delete a Contract Item

Make sure you are working with the conference for which you want to edit the contract item.

1. In the browse tree, expand Conferences and click Contracts. The Contract Categories will appear in the main portion of the window.
2. To edit a contract item, click the name of the item you want to edit and click the Edit button on the toolbar, or right-click the name of the category and select Edit. The Enter window will open. Change the information and then click the OK button.
3. To delete a contract item, click the name of the item you want to delete and click the Delete button on the toolbar, or right-click the name of the category and select Delete. Click the OK button when you are asked to confirm that you want to delete that contract item.

If, instead, you try to Delete a contract item by editing it and deleting all the information in the field and then clicking the OK button, you will receive an error (Figure 12-5). In this case, click the OK button to close the warning, click the Cancel button to leave the Edit mode, and click the Delete button instead of the Edit button.

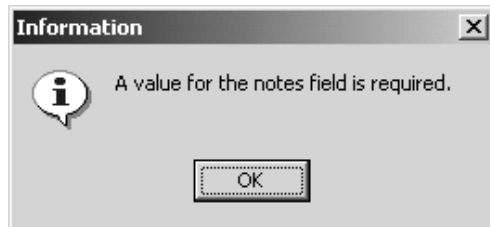


Figure 12-5

12.3 Conference Export Wizard

The Conference Export wizard exports your information from Conference Programmer to a format that Microsoft Word can use to merge into your contracts. You can merge into your contract any field on the Conference General tab and any contract item entered using Contracts.

Seattle Technology Group, Inc. chose not to make the contract a report in Conference Programmer because reports only display information, they cannot change information (see Section 16: Reports). It is common for a standard contract to be altered for each customer! This can easily be done in a Microsoft Word merge document, but is near impossible to do in a Crystal report.

Microsoft Word cannot merge information straight from Conference Programmer, so you must first export the information to a format the Microsoft Word can understand.

1. In the browse tree, expand Wizards and click Conference Export. The Export Wizard window will open (Figure 12-6).
2. In the Select Merge File Location field, you can tell the wizard where to save your exported data. Your contract should already be created in Microsoft Word and saved as a template; this template is a merge file and is

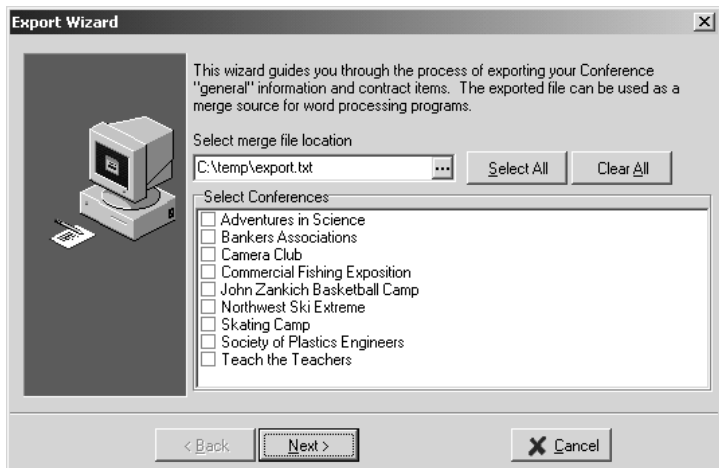


Figure 12-6

set to look in a specific place for the export file you are now making, so you should never have to change the Select Merge File Location field. If your contract has not already been converted to a template, you can do it at any time (see Section 12.5: Creating a Contract Template).

Section 12: Contracts

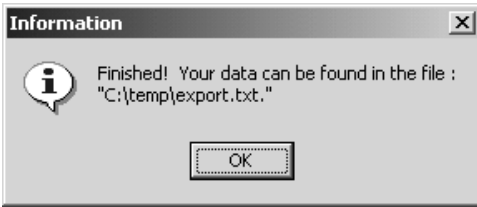


Figure 12-7

3. Select the conference or conferences you wish to export by checking the checkbox next to their names, then click the Next button. An information window appears indicating where your exported data can be found (Figure 12-7).
4. Click the OK button.

12.4 Merging Data Into a Contract

Note: Different versions of Microsoft Word will have the features in different locations, or may rename the features or buttons, or may have different windows, but will most certainly have the mail merge features you need. Consult your Microsoft Word manual for help on Microsoft Word's features.

If you do not have a document template created for your contract, you must create one (see Section 12.5: Creating a Contract Template).

1. Open Microsoft Word and click the File menu and select New. If you use any other shortcut to open a new document, you will not be presented with the choice to select a template.
2. Click on your contract template and click the OK button (Figure 12-8).

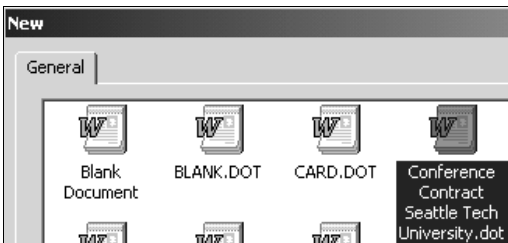


Figure 12-8

3. Your template contract will open. The contract will display with fields names from Conference Programmer enclosed in symbols (“<<Conference_Name>>”). This looks confusing, but is not how the final result will appear.
4. Click the Tools menu and select Mail Merge..., or click the Merge button on the Mail Merge toolbar. Select Merge To New Document.
5. The resulting document is your contract. You should save this document somewhere on your computer so that you can print or email it to your customer at a later date or time.

12.5 Creating a Contract Template

To create a document template, you must first run the Conference Export wizard to create some data to merge into your contract (see Section 12.3: Conference Export Wizard). It does not matter which conference you export, even if there is almost no information entered for that conference - we just need a source of data here, an export file (even an empty one).

1. Run the Conference Export wizard. Select any conference you want - this is necessary to create a source of data, an export file.
2. If you have your existing contract in Microsoft Word, open it now. If not, create a new Microsoft Word document and type your contract into it.
3. Click on the Edit menu and select Select All to highlight all the text in your contract, then click the Edit menu again and select Copy. This will put your contract in your computer's temporary memory. Close the file containing your contract, but leave Microsoft Word open. It is not necessary to save the file at this point.
4. Click the Tools menu and select Options, and click the File Locations tab. Write down the Location next to "User Templates" under File Types. It will most likely be something like "C:\Program Files\Microsoft Office\Word Templates." This is where you will save your template when you finish creating it. Close the Options window by clicking the Cancel button.
5. Click the File menu and select New. Select "Template" at the lower right of the window and click the OK button. If you use any other shortcut to open a new document, you will not be presented with the choice to select a template.
6. With the new, blank template open, click the Tools menu and select Mail Merge. Then click the Create button and select Form Letters... (Figure 12-9) and click the Active Window button (Figure 12-10).

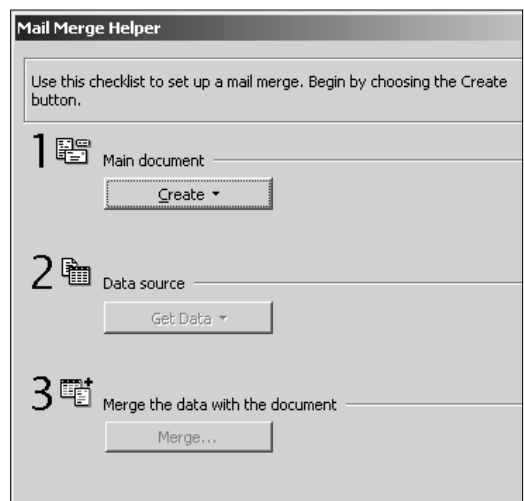


Figure 12-9

Section 12: Contracts

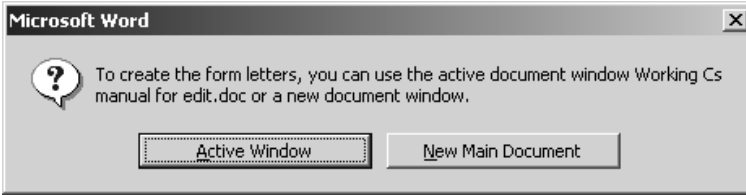


Figure 12-10

7. Click the Get Data button and select Open Data Source... You will now see the Open Data Source dialog box (Figure 12-11).

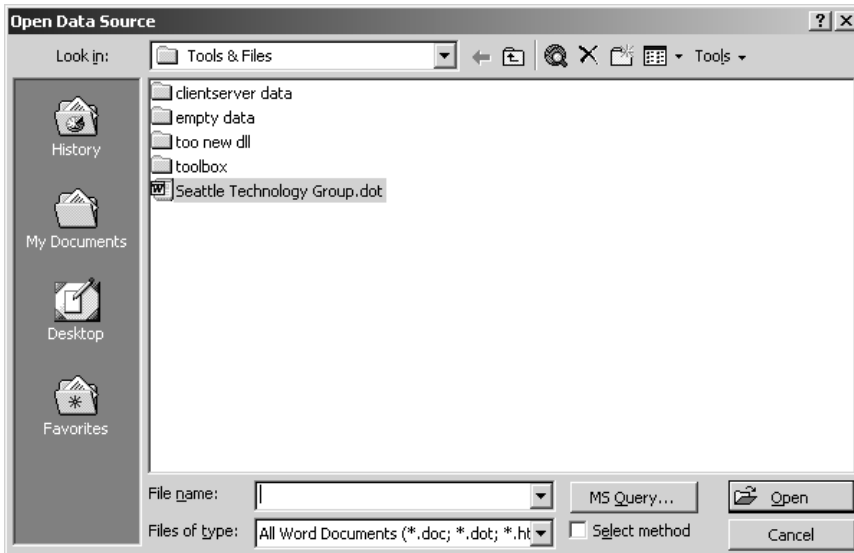


Figure 12-11

8. In the Files Of Type field select "Text Files (*.txt)".
9. Navigate to the directory you exported your conference info to in step 1.
10. Click the file "export.txt" and click the Open button. A window will open indicating that Microsoft Word has found no merge fields (Figure 12-12). Click the Edit Main Document button.

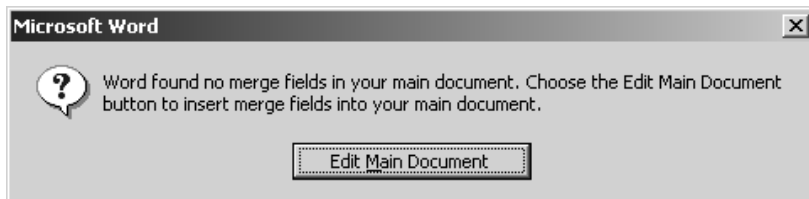


Figure 12-12

Section 12: Contracts

11. Click the Edit menu and select Paste to paste your contract into this new merge template document.
12. Move the blinking cursor to a point in your contract where you want information merged in from Conference Programmer. For example, put the blinking cursor where the conference name should appear in the contract.
13. Click the Insert Merge Field button on the mail merge toolbar. It presents a list of all the fields from Conference Programmer available for you to merge into your contract. Select the field you want merged into your contract at that location. In this example, select "Conference_Name."

Repeat steps 12 and 13 for every field from Conference Programmer you want merged into your contract.

14. When finished, click the File menu and select Save As... In the Save As Type field select "Document Template (*.dot)." Make sure the Save In field is the same location you wrote down in step 4, the location of the "User Templates." In the File Name field, type a name for the document template; we suggest "Conference Contract." Click the Save button.

Now that you have a contract template, you can create contracts from Conference Programmer (see Section 12.4: Merging Data Into a Contract).

Section 13: Meals Wizard

13 Meals Wizard

Before you run the Meals Wizard, you must first enter your dining halls into Conference Programmer.

13.1 Creating a Dining Hall

To enter a dining hall you must first enter the building that the dining hall is in into Conference Programmer (see Section 17.5: Buildings and Rooms).

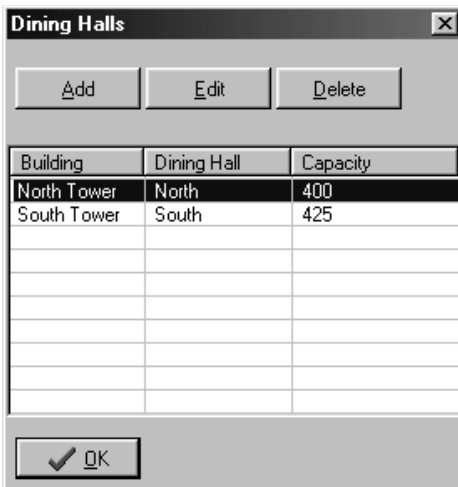


Figure 13-1

Add a Dining Hall

1. In the browse tree, expand Setup and click Dining Halls. The Dining Halls window will open (Figure 13-1).
2. Click the Add button to add a new dining hall. The Dining Hall window will open (Figure 13-2).
3. In the Building field, select the building in which the dining hall is located (you may have entered a building specifically for this dining hall, and not for any residence rooms).
4. In the Name field, type the Name of the dining hall (it may have the same name as the building).
5. Set the Capacity field to the maximum capacity for the dining hall by typing a number or clicking on the up- or down-arrows next to the Capacity field. Click the OK button.

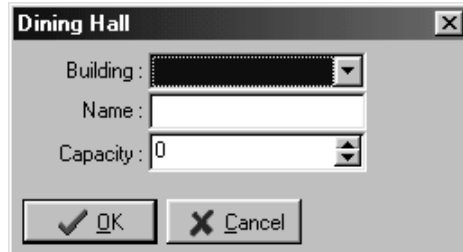


Figure 13-2

Delete a Dining Hall

1. In the browse tree, expand Setup and click Dining Halls. The Dining Halls dialog box will appear.

Section 13: Meals Wizard

2. Click the name of the dining hall and click the Delete button. Click the OK button.

You will not be able to delete a dining hall if it is being used; you will receive a warning (Figure 13-3). In order to delete this dining hall, you will first have to delete all the Meals entries in it for every conference.



Figure 13-3

13.2 Running the Meals Wizard

Make sure you are working with the conference for which you want to add meals.

1. In the browse tree, expand Conferences and click Meals. The Meals wizard will appear on the main portion of the window (Figure 13-4).

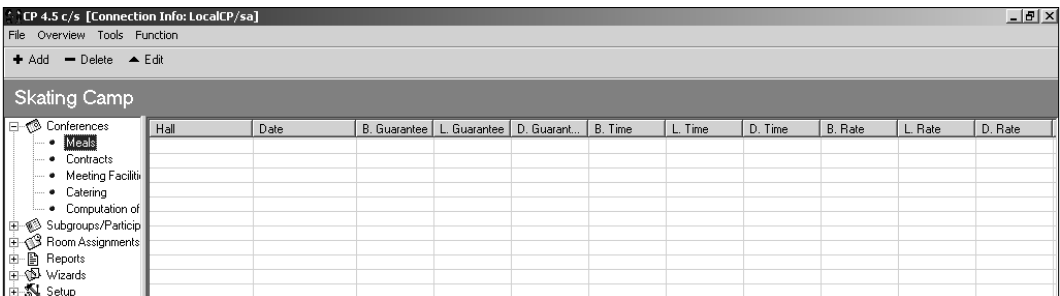


Figure 13-4

2. Click the Add button on the toolbar. The Insert Dining Counts window will open (Figure 13-5).

3. Most of the fields in this window are already filled in for you, with information from your Conference General tab, or with information used the last time the Meals wizard was run. For example, the Begin and End fields are automatically filled in with the check-in and check-out dates of the conference, and the Rate and Time fields are automatically filled in with the last rates and times used when the Meals wizard was run (if this is the first time using the Meals wizard, some default rates and times are entered).

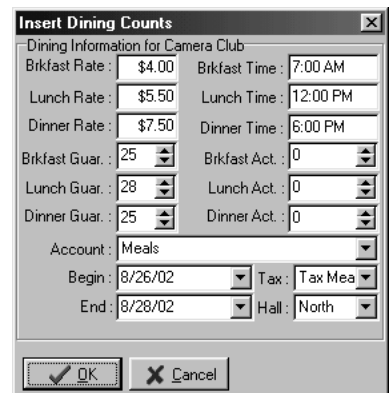


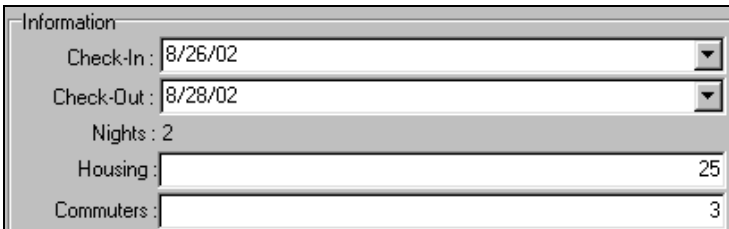
Figure 13-5

Section 13: Meals Wizard

There are separate Rate fields for breakfast, lunch, and dinner, to allow complete control. This is also true of the Time, Guaranteed #, and Actual # fields. Make sure the rate for each meal is correct.

The Time fields for each meal are informational only - they show up on reports and help organize and plan efficiently, but do not affect billing. Make sure each meal's Time field is set to the appropriate meal's starting time. If any individual meal's time is different, it may be edited later (see Section 13.3: Editing Meal Counts).

Notice the Guaranteed # fields: the Break Guar. And Dinner Guar. fields are set to 25, but the Lunch Guar. field is set to 28. In this example, there are 25 participants for whom we are responsible for room and board, and 3 participants for whom we are only responsible for board ("commuters"). These numbers are set on the Conferences General tab, on the right, in the Housing and Commuters fields (Figure 13-6). Conference Programmer automatically suggests that the commuters will be eating lunch in your dining commons, but not breakfast or dinner. Even though these default values are automatically entered, each of them is adjustable.



Information	
Check-In :	8/26/02
Check-Out :	8/28/02
Nights :	2
Housing :	25
Commuters :	3

Figure 13-6

Notice, also, that there are Actual # fields for breakfast, lunch, and dinner. You can leave these fields set to 0 (zero) for now, but you may want to adjust these later to reflect the actual number of participants who ate in the dining commons for each meal. When meal charges are applied, the greater of the two numbers (Guaranteed or Actual) will be charged, so if you do not have a means to count the actual number of diners, the guaranteed number will work.

In the Account field, select the account you want to track charges for your dining commons. In this example, we selected the "Meals" account.

Choose a tax rule in the Tax field - this field is required even if you do not charge tax.

In the Hall field, select the dining hall you want your participants to eat in. Figure 13-7 shows that we have selected the North dining hall. You can assign some participants to one dining hall, and other participants to another dining hall (see Section 13.4: Multiple Dining Halls).

Section 13: Meals Wizard

Hall	Date	B. Guarantee	L. Guarantee	D. Guarant...	B. Time	L. Time	D. Time
North	8/26/02	25	28	25	7:00 am	12:00 pm	6:00 pm
North	8/27/02	25	28	25	7:00 am	12:00 pm	6:00 pm
North	8/28/02	25	28	25	7:00 am	12:00 pm	6:00 pm

Figure 13-7

13.3 Editing Meal Counts

It is common that a specific meal is different than the normal meals; perhaps it starts at a different time, or will feed more people, or cost less. In this example, the conference has indicated that 15 additional guests will be attending a special dinner on 8/28/02 and they would like that meal to start at 6:30p rather than 6:00p.

Make sure you are working with the conference for which you want to edit the meals.

1. In the browse tree, expand Conferences and click Meals. The Meals wizard will appear on the main portion of the window.
2. Click on the day that contains the meal you want to edit, and click the Edit button on the toolbar. The Edit Meals window will open (Figure 13-8).

Change the appropriate information. In this example, the Dinner Rate, Dinner Count, Dinner, and Time fields have been edited (Figure 13-8). You may want to enter a note about this change: Click the Notes tab and type your information in the field. Notes appear on the "Dining Counts by Date Range" report (see Section 16.1: Viewing Reports).

Edit Meals

Meal Info | Notes

Date: 8/28/02 Hall: North

Brkfast Rate: \$4.00 Brkfast Time: 7:00 AM

Lunch Rate: \$5.50 Lunch Time: 12:00 PM

Dinner Rate: \$10.50 Dinner Time: 6:30 PM

Brkfast Count: 25 Brkfast Act.: 0

Lunch Count: 28 Lunch Act.: 0

Dinner Count: 40 Dinner Act.: 0

Account: Meals Tax: Tax Meal

OK Cancel

Figure 13-8

13.4 Multiple Dining Halls

You may have a situation in which you need to split up a group into multiple dining halls. If you plan to use multiple dining halls you need to determine counts for each dining hall and enter them separately.

Make sure you are working with the conference for which you want to assign meals to multiple dining halls.

Section 13: Meals Wizard

1. In the browse tree, expand Conferences and click Meals. The Meals wizard will appear on the main portion of the window.
2. Click the Add button on the toolbar and set the Guaranteed # fields for Breakfast, Lunch, and Dinner to the number of participants dining in the first dining hall. Make sure the remaining information is correct (meal times, rates, etc.). Click the OK button.
3. Click the Add button on the toolbar again and repeat step 2 for each separate dining hall you are working with.

The Meals wizard displays all meals for each day and dining hall. You can edit a particular meal, in a particular dining hall (see Section 13.3: Editing Meal Counts).

Figure 13-9

The South Tower dining hall has a maximum capacity of 425, and the North Tower dining hall has a maximum capacity of 400. The capacity of the dining hall is entered when the dining hall is set up (Figure 13-10) (see Section 13.1: Creating a Dining Hall).

You can now view various meal planning reports or enter meal charges (see Sections 16.1: Viewing Reports and 10.1: Group Billing).

In this example, our conference has 810 participants, 20 of which are commuters. Given these parameters, 790 should be entered in the Housing field and 20 in the Commuters field on the Conference General tab. Figure 13-9 shows what the Insert Dining Counts window will look like when the Meals wizard is run.

Building	Dining Hall	Capacity
North Tower	North	400
South Tower	South	425

Figure 13-10

We can split our group into dining halls based on the hall capacities. In this example, we are assigning 395 participants and 20 commuters to the South Tower dining hall (Figure 13-11).

Section 13: Meals Wizard

After clicking the OK button and clicking the Add button on the toolbar again, we assign the remainder of our participants (395) and commuters (zero) to the North Tower dining Hall (Figure 13-12).

After we click the OK button, the Meals wizard displays all meals for each day and each dining hall (Figure 13-13).

13.5 Deleting Meals

If you need to remove a meal from a specific day that you have already created (you've already run the Meals wizard for), you must edit that day and set the Guaranteed # field for that meal to 0 (zero).

You can also remove an entire day that you have already created.

Make sure you are working with the conference from which you want to delete meals.

1. In the browse tree, expand Conferences and click Meals. The Meals wizard will appear on the main portion of the window.
2. Click on the day you want to delete and click on the Delete button on the toolbar. Then click the OK button when asked to confirm that you want to delete that day.

Insert Dining Counts

Dining Information for John Zankich Basketball Camp

Brkfast Rate : \$4.00 Brkfast Time : 7:00 AM

Lunch Rate : \$5.50 Lunch Time : 12:00 PM

Dinner Rate : \$7.50 Dinner Time : 6:00 PM

Brkfast Guar. : 395 Brkfast Act. : 0

Lunch Guar. : 415 Lunch Act. : 0

Dinner Guar. : 395 Dinner Act. : 0

Account : Meals

Begin : 8/18/02 Tax : Tax Mea

End : 8/25/02 Hall : South

OK Cancel

Figure 13-11

Insert Dining Counts

Dining Information for John Zankich Basketball Camp

Brkfast Rate : \$4.00 Brkfast Time : 7:00 AM

Lunch Rate : \$5.50 Lunch Time : 12:00 PM

Dinner Rate : \$7.50 Dinner Time : 6:00 PM

Brkfast Guar. : 395 Brkfast Act. : 0

Lunch Guar. : 395 Lunch Act. : 0

Dinner Guar. : 395 Dinner Act. : 0

Account : Meals

Begin : 8/18/02 Tax : Tax Mea

End : 8/25/02 Hall : North

OK Cancel

Figure 13-12

Hall	Date	B. Guarantee	L. Guarantee	D. Guarant...	B. Time	L. Time	D. Time	B. Rate
South	8/18/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/19/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/20/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/21/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/22/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/23/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/24/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
South	8/25/02	395	415	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/18/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/19/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/20/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/21/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/22/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/23/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/24/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00
North	8/25/02	395	395	395	7:00 am	12:00 pm	6:00 pm	\$4.00

Figure 13-13

Section 14: Catering Wizard

14 Catering Wizard

The Catering wizard can handle very complex catering business models. The Catering wizard has four levels of hierarchy: Meetings, Events, Menus, and Catering Items.

- A Meeting can have several catering Events; for example, a Meeting called “Thursday, February 14” might contain a catering Event called “Catered Dinner” and an Event called “Dessert Break.”
- An Event can contain several Menus; for example, an Event called “Dessert Break” might contain a Menu called “Brownies” and a Menu called “Coffee.”
- A Menu can contain several Catering Items; for example, a Menu called “Coffee” might contain a Catering Item called “Coffee,” a Catering Item called “Decaffeinated Coffee,” and a Catering Item called “Deluxe Linen.”
- A Catering Item is the basic unit for the Catering Wizard; every item that you want to track or charge for must be a Catering item; for example, a Catering Item might be “Coffee,” “Decaffeinated Coffee,” or “Deluxe Linen.”

To use the Catering wizard, you must create at least one of each of these items, so for very simple catering operations it may be easier to not use the Catering Wizard at all, but instead simply add manual charges to the Charges and Payments tab of the conference, subgroup, or participant (see Section 10.1: Group Billing).

14.1 Catering Items

Add a Catering Item

1. In the browse tree, expand Setup and click Catering Items. The Menu Items window will open (Figure 14-1).
2. Click the Add Item button. The Cater Item window will open (Figure 14-2).
3. In the Cater Item field, type the name of the Catering Item you want to add. If you want to also add a Menu that contains only this Catering Item, check the “Add this item as Menu” checkbox (see Section 14.2: Catering Menus). Click the OK button.

Section 14: Catering Wizard

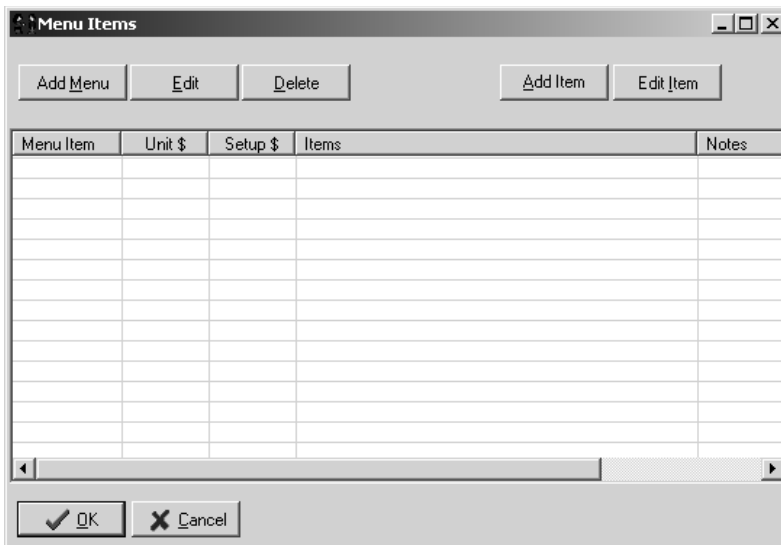


Figure 14-1

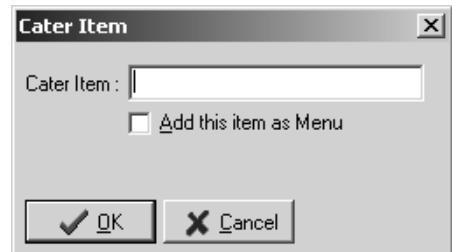


Figure 14-2

4. Click the OK button to close the Menu Items dialog box.

Edit a Catering Item

1. In the browse tree, expand Setup and click Catering Items. The Menu Items window will open (Figure 14-1).
2. Click the Edit Item button. The Edit Cater Item window will open (Figure 14-3).
3. Click on the Catering Item you want to edit and click the Edit Item button. The Cater Item window will open (Figure 14-4).
4. Change the appropriate information and click the OK button.

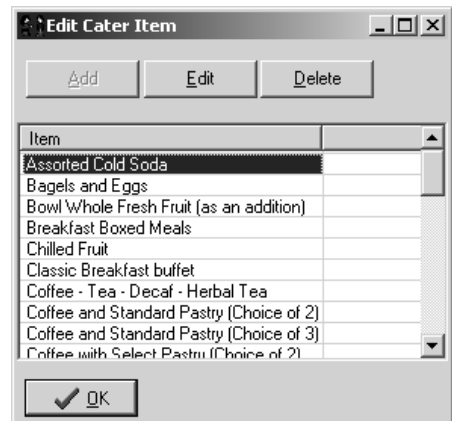


Figure 14-3

Section 14: Catering Wizard

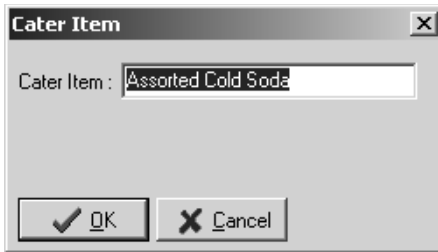


Figure 14-4

5. Click the OK button to close the Edit Cater Item window.
6. Click the OK button to close the Menu Items window.

Delete a Catering Item

1. In the browse tree, expand Setup and click Catering Items. The Menu Items window will open (Figure 14-1).
2. Click the Edit Item button. The Edit Cater Item window will open (Figure 14-3).
3. Click on the Catering Item you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the Catering Item.

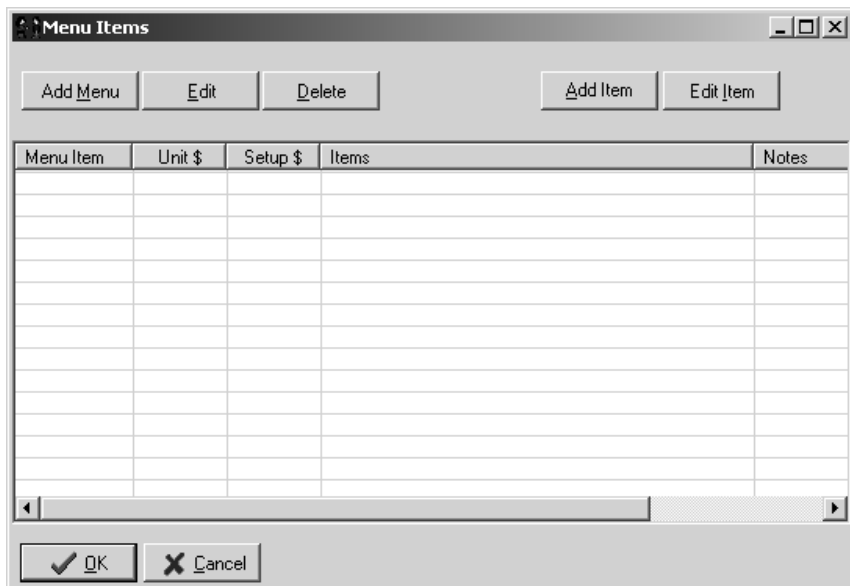


Figure 14-5

Section 14: Catering Wizard

You will not be able to delete a Catering Item if it is being used; you will receive a warning. In order to delete this Catering Item, you will first have to delete it from all Menus, in all Catering Events, for all Catering Meetings.

4. Click the OK button to close the Edit Cater Item window.
5. Click the OK button to close the Menu Items window.

14.2 Catering Menus

Add a Menu

You cannot add a Catering Item directly to a catering Event; you must have a Menu that contains the Catering Item, and you can add the Menu to the Event. Although a Menu can contain multiple Catering Items for more complex catering scenarios, it can also contain just one Catering Item for the most simple use.

1. In the browse tree, expand Setup and click Catering Items. The Menu Items window will open (Figure 14-5).
2. Click the Add Menu button. The Cater Items window will open (Figure 14-6).
3. In the Menu field, type the name of the Menu item. This can be the same as the name of a Catering Item; for example, if this Menu item contains only the “Assorted Cold Soda” Catering Item, the name of the Menu can also be “Assorted Cold Soda.” This simple Menu (named the same as the one Catering Item it contains) is automatically created for you if you check the “Add this item as Menu” checkbox when adding a Catering Item (see Section 14.1: Catering Items).
4. In the Unit \$ field, type the price you want to charge for each unit of this Menu. For example, if this menu will contain the “Assorted Cold Soda,” “Bagels and Eggs,” and “Chilled Fruit” Catering Items, and we want to charge \$6.35 for each person who this menu serves, we would type “6.35” in the Unit \$ field.

Item	Quantity
<input type="checkbox"/> Assorted Cold Soda	0
<input type="checkbox"/> Bagels and Eggs	0
<input type="checkbox"/> Bowl Whole Fresh Fr...	0
<input type="checkbox"/> Breakfast Boxed Me...	0
<input type="checkbox"/> Chilled Fruit	0

Figure 14-6

Section 14: Catering Wizard

5. In the Setup \$ field, type the price you want to charge to set up this Menu item for your customer.
6. Set the sort field to list the Menu in the order you want (see Section 1.11: Sort Fields).
7. Set the Serves field to the number of people this Menu (at this price) will serve. When adding a Menu item to an Event, you can determine how many of the Menu item to add; how many people a Menu serves will help determine how many of the Menu item to add. For example, a Menu item called “Personal Pizza” might serve one person, but a Menu item called “Extra Large Pizza” might serve 4 people. In the example in step 4, we want to charge \$6.35 per person for this menu: Since we already set the \$6.35 in step 4, we will now set the menu to serve 1 person.
8. Check the checkbox next to each Catering Item in the list that you want to include in this Menu item. Double-click a Catering Item to change the quantity. For example, you can change the quantity of “Assorted Cold Soda” Catering Items to 2 for this Menu item, meaning that 2 of the “Assorted Cold Soda” Catering Item will serve 1 person (setting this menu to serve 1 person was done in step 7).

Item	Quantity
<input type="checkbox"/> Assorted Cold Soda	0
<input checked="" type="checkbox"/> Bagels and Eggs	1
<input type="checkbox"/> Bowl Whole Fresh Fruit (as an addition)	0
<input type="checkbox"/> Breakfast Boxed Meals	0
<input type="checkbox"/> Chilled Fruit	0
<input checked="" type="checkbox"/> Classic Breakfast buffet	1
<input type="checkbox"/> Coffee - Tea - Decaf - Herbal Tea	0
<input type="checkbox"/> Coffee and Standard Pastry (Choice of 2)	0
<input checked="" type="checkbox"/> Coffee and Standard Pastry (Choice of 3)	2
<input type="checkbox"/> Coffee with Select Pastry (Choice of 2)	0
<input type="checkbox"/> Coffee with Select Pastry (Choice of 3)	0

Figure 14-7

Figure 14-7 shows that we have created a Menu item called “Breakfast Coffee,” and that we are charging \$25.00 to setup this Menu and \$6.35 per participant that this Menu serves. It also shows that this Menu serves one person (so we will have to add this Menu to an Event once for each participant in that Event - see Section 14.3: Catering Meetings). You can also see that this Menu has three Catering Items: “Bagels and Eggs,” “Classic Breakfast buffet,” and “Coffee and Standard Pastry (choice of 3).” Each of the catering items is set to a quantity of 1, except “Coffee and Standard Pastry (choice of 3)” which is set to 2.

9. You can enter extra notes for this Menu by clicking the Notes tab and typing the notes in the field.
10. Click the OK button.

11. Click the OK button to close the Menu Items window.

Edit a Menu

1. In the browse tree, expand Setup and click Catering Items. The Menu Items window will open.
2. Click on the Menu you want to edit and click the Edit button. The Cater Items window will open (Figure 14-7).
3. Change the appropriate information and click the OK button.
4. Click the OK button to close the Menu Items window.

Delete a Menu

1. In the browse tree, expand Setup and click Catering Items. The Menu Items window will open.
2. Click on the Menu you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the Menu.

You will not be able to delete a Menu if it is being used; you will receive a warning. In order to delete this Menu, you will first have to delete it from all Catering Events, for all Catering Meetings.

3. Click the OK button to close the Menu Items window.

14.3 Catering Meetings

Add a Catering Meeting

Although you must create Catering Items and Menus before you can add them to a catering Event, you cannot create a catering Event until you create the catering Meeting that will contain the Event.

Make sure you are working with the conference for which you want to add Catering to.

1. In the browse tree, expand Conferences and click Catering. The Catering wizard will appear in the main portion of the window (Figure 14-8).
2. Click the Add button on the toolbar. The Catering Events window will open (Figure 14-9).

Section 14: Catering Wizard

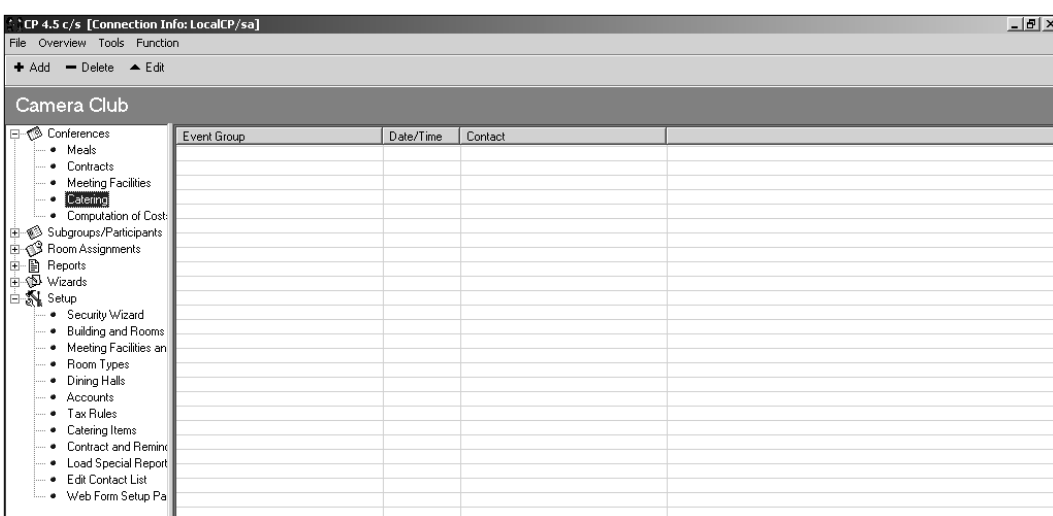


Figure 14-8

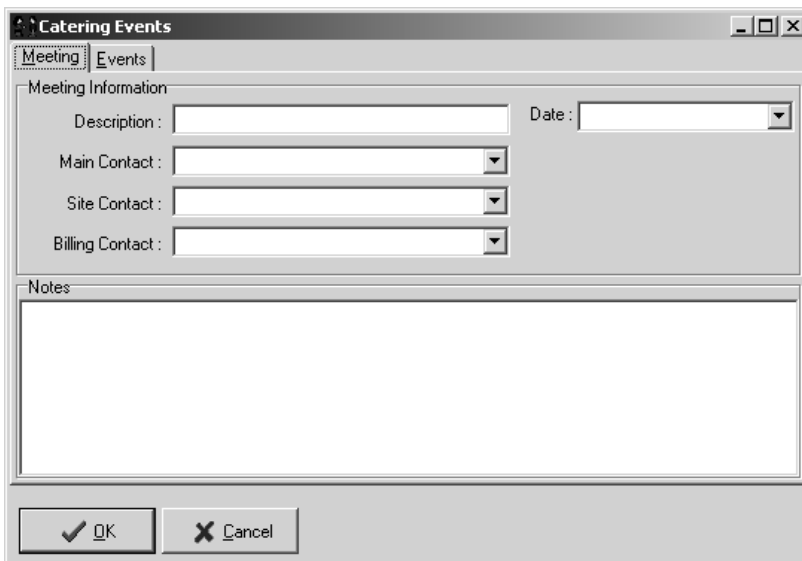


Figure 14-9

In the Description field, type a name for this Meeting. We suggest naming the Meeting after the day, and naming the Events something descriptive. In this example, we will name the Meeting “Thursday, February 14.”

Set the Date field to the date of this catering Meeting.

In the Main Contact field, select the person who will be the main contact for this catering Meeting. The list of contacts to choose from can be edited or

Section 14: Catering Wizard

added to in the Contact List (see Section 17.13: Contact List). The Main Contact is a required field - if you do not want to use it, create one bogus person in your Contact List and select that person in the Main Contact field.

The Site Contact and Billing Contact fields are not required, but are useful if you have a different contact person to set up the catering, to talk to on-site, and to handle billing.

Enter any special notes about the catering Meeting in the Notes field.

3. Click the OK button.

Edit a Catering Meeting

Make sure you are working with the conference which contains the catering Meeting you want to edit.

1. In the browse tree, expand Conferences and click Catering. The Catering wizard will appear on the main portion of the window.
2. Click on the catering Meeting you want to edit and click the Edit button on the toolbar. The Catering Events window will open (Figure 14-10). Note that this is the same window you see when you add new catering Meetings, but is now displaying the Events tab.

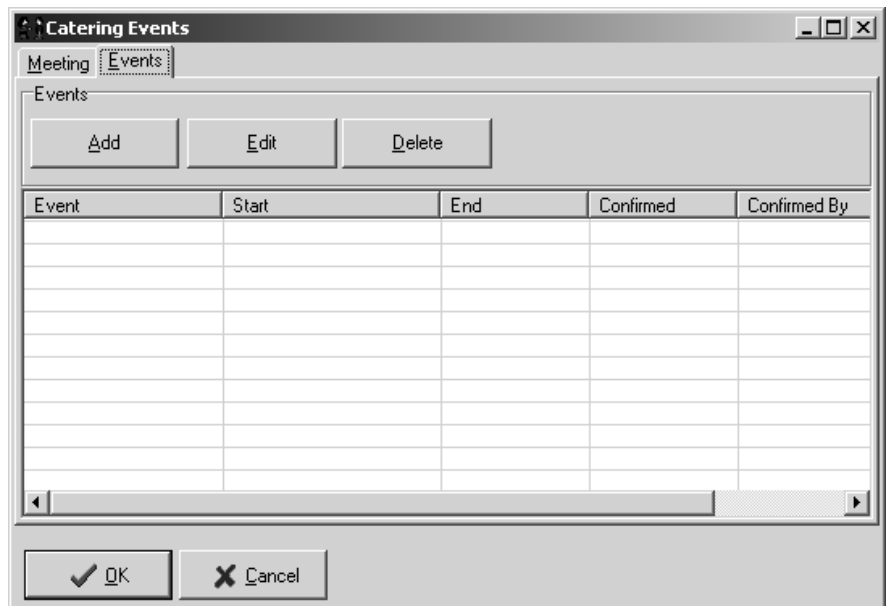


Figure 14-10

Section 14: Catering Wizard

3. To change information about the Meeting, click the Meeting tab and make the appropriate changes. To change information about the Events in the Meeting, make the appropriate changes on the Events tab (see Section 14.4: Catering Events).
4. Click the OK button.

Delete a Catering Meeting

Make sure you are working with the conference from which you want to delete a catering Meeting.

1. In the browse tree, expand Conferences and click Catering. The Catering wizard will appear on the main portion of the window.
2. Click the catering Meeting you want to delete and click the Delete button on the toolbar. Click the OK button in the confirmation message (Figure 14-11).

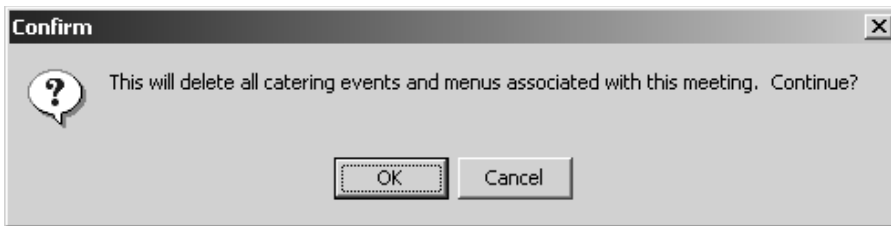


Figure 14-11

14.4 Catering Events

Before you can add catering Events, you must create Catering Items and Menus to add to the Event, and you must create the catering Meeting that will contain the Event (see Sections 14.1: Catering Items, 14.2: Catering Menus, and 14.3: Catering Meetings).

Add a Catering Event

Make sure you are working with the conference for which you want to add a catering Event.

1. In the browse tree, expand Conferences and click Catering. The Catering wizard will appear on the main portion of the window.
2. If you want to add a catering Event to a catering Meeting that already exists, click the name of that catering Meeting and click the Edit button on the toolbar. The Catering Events window will open

Section 14: Catering Wizard

(Figure 14-12). If you want to add a catering Event to a new catering Meeting, you must first create the catering Meeting (see Section 14.3: Catering Meetings).

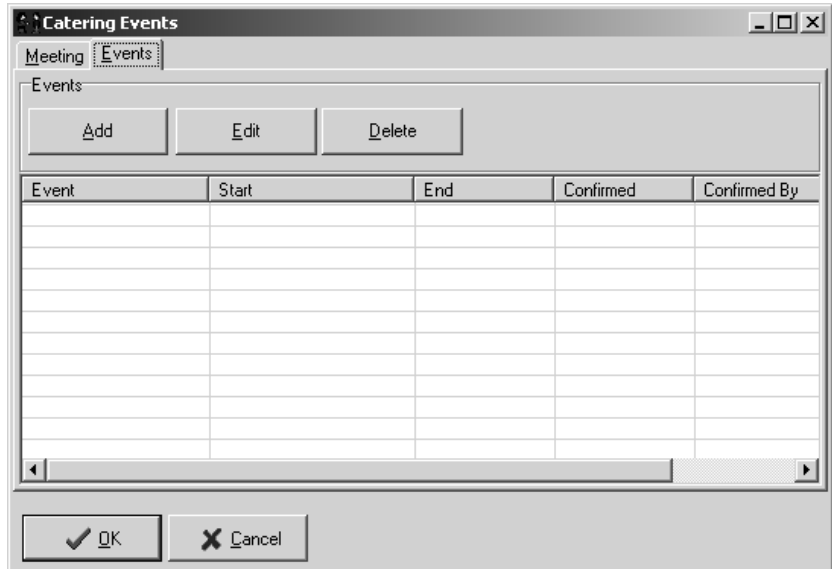


Figure 14-12

3. Make sure you are viewing the Events tab and click the Add button. The Catering Event window will open (Figure 14-13).

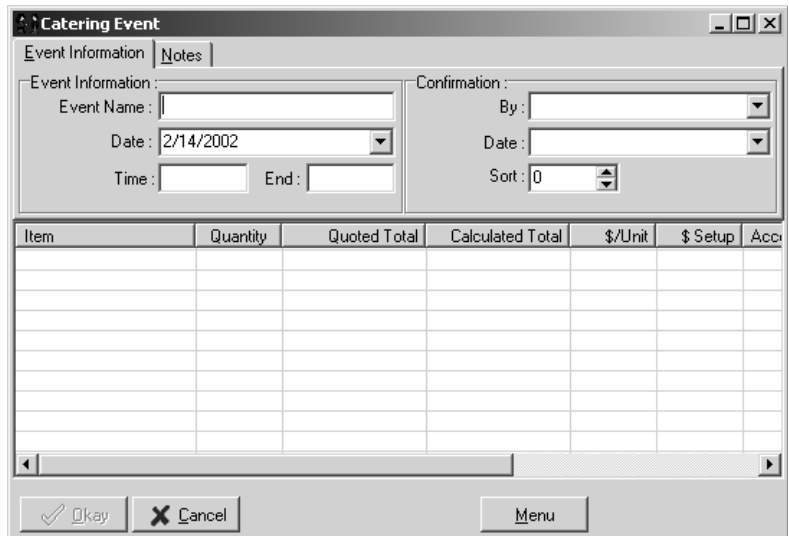


Figure 14-13

Section 14: Catering Wizard

4. In the Event Name field, type a name for the Event. This should be a short descriptive name to differentiate this Event from others in the same Catering Meeting.

Set the date field to the date this Event takes place. This date can be different than the date of the Meeting, even though you may have named your Meeting after a day. In this example, our Meeting is called “Thursday, February 14” and takes place on that day, but we can still have an Event on a different day. This is to allow different naming and dating schemes.

Set the Time and End fields to the start and finish time of this Event.

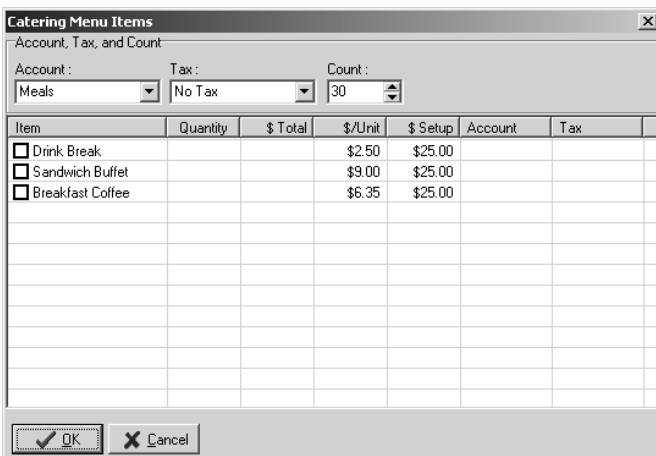
The Confirmation fields By and Date are not mandatory but can be used to track which of your contacts approved the catering information you are entering. In the By field, select the contact who confirmed or approved the information you are entering. Set the date field to the date the information was confirmed.

Set the Sort field to list the Event in the order you want (see Section 1.11: Sort Fields).

5. To add notes to this Event, click the Notes tab and type your notes in the field.

The bottom portion of the window lists all Menus that have been added to this Event.

6. Click the Menu button. The Catering Menu Items window will open (Figure 14-14).



The screenshot shows a window titled "Catering Menu Items" with a close button (X) in the top right corner. Below the title bar is a section labeled "Account, Tax, and Count" containing three fields: "Account:" with a dropdown menu showing "Meals", "Tax:" with a dropdown menu showing "No Tax", and "Count:" with a spinner box showing "30". Below this is a table with the following columns: "Item", "Quantity", "\$ Total", "\$/Unit", "\$ Setup", "Account", and "Tax". The table contains three rows of data:

Item	Quantity	\$ Total	\$/Unit	\$ Setup	Account	Tax
<input type="checkbox"/> Drink Break			\$2.50	\$25.00		
<input type="checkbox"/> Sandwich Buffet			\$9.00	\$25.00		
<input type="checkbox"/> Breakfast Coffee			\$6.35	\$25.00		

At the bottom of the window are two buttons: "OK" with a checkmark icon and "Cancel" with an X icon.

7. In the Account field, select the account you want to track charges for your catering Events. Choose a tax rule in the Tax field - this field is required even if you do not charge tax.

Set the Count field to the number of people this Event will serve.

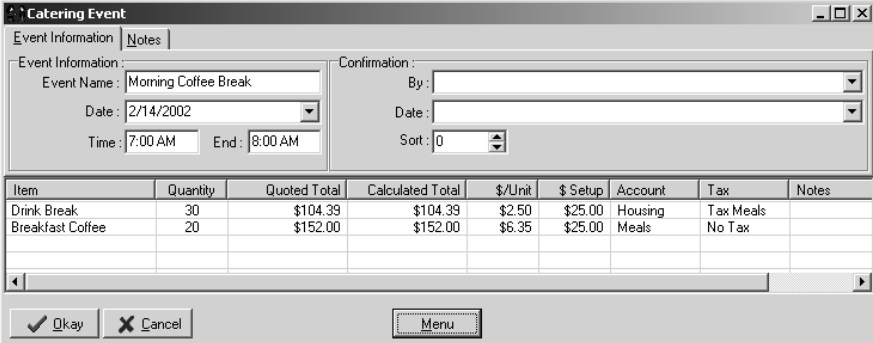
Figure 14-14

Section 14: Catering Wizard

Check the checkbox next to each Menu item you want to add to this Event. When you add a Menu item, the values in the Account, Tax, and Count fields are automatically set for the Menu you check. For example, if you want to add 30 “Drink Break” Menu items with no tax in the Housing account, set the Count field to 30, the Tax field to “No Tax,” and the Account fields to “Housing,” then check the “Drink Break” checkbox. Then, if you want to add 20 “Sandwich Buffet” Menu items with meals tax in the Meals account, set the Count field to 20, the tax field to “Tax Meals,” and the Account field to “Meals,” then check the “Sandwich Buffet” checkbox.

To change the quantity of an added Menu item, uncheck its checkbox, set the Account, Tax, and Count fields appropriately, and re-check the checkbox.

8. Click the OK button. The Catering Event window lists all Menus that have been added (Figure 14-15).



The screenshot shows the 'Catering Event' window with the following details:

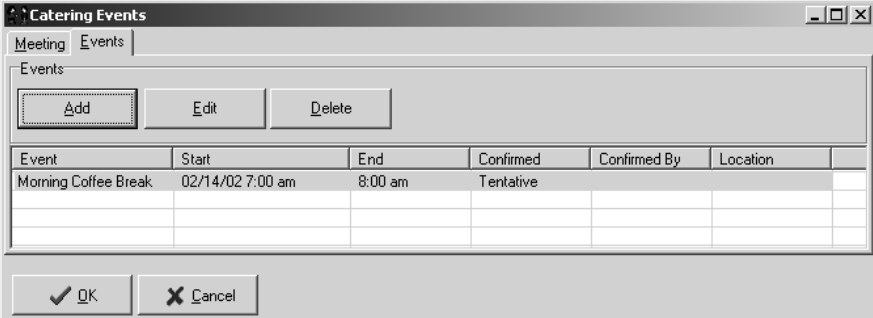
- Event Information: Event Name: Morning Coffee Break, Date: 2/14/2002, Time: 7:00 AM, End: 8:00 AM
- Confirmation: By: [blank], Date: [blank], Sort: 0
- Table of Menu Items:

Item	Quantity	Quoted Total	Calculated Total	\$/Unit	\$ Setup	Account	Tax	Notes
Drink Break	30	\$104.39	\$104.39	\$2.50	\$25.00	Housing	Tax Meals	
Breakfast Coffee	20	\$152.00	\$152.00	\$6.35	\$25.00	Meals	No Tax	

Buttons: OK, Cancel, Menu

Figure 14-15

9. Click the OK button to close the Catering Event window. The Catering Events window lists all Events that have been added (Figure 14-16).



The screenshot shows the 'Catering Events' window with the following details:

- Buttons: Add, Edit, Delete
- Table of Events:

Event	Start	End	Confirmed	Confirmed By	Location
Morning Coffee Break	02/14/02 7:00 am	8:00 am	Tentative		

Buttons: OK, Cancel

Figure 14-16

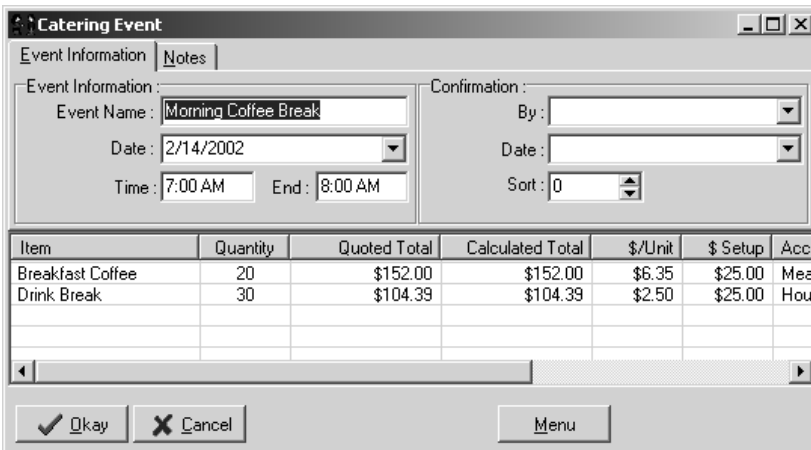
10. Click the OK button to close the Catering Events window.

Section 14: Catering Wizard

Edit a Catering Event

Make sure you are working with the conference that contains the catering Event you want to edit.

1. In the browse tree, expand Conferences and click Catering. The Catering wizard will appear in the main portion of the window.
2. Click the name of the catering Meeting that contains the catering Event you want to edit and click the Edit button on the toolbar. The Catering Events window will open.
3. Click on the Event you want to edit and click the Edit button. The Catering Event window will open (Figure 14-17).



The screenshot shows the 'Catering Event' window with two tabs: 'Event Information' and 'Notes'. The 'Event Information' tab is active, displaying the following fields:

- Event Name: Morning Coffee Break
- Date: 2/14/2002
- Time: 7:00 AM, End: 8:00 AM
- Confirmation: By: [dropdown], Date: [dropdown], Sort: 0

Below the form is a table with the following data:

Item	Quantity	Quoted Total	Calculated Total	\$/Unit	\$ Setup	Acco
Breakfast Coffee	20	\$152.00	\$152.00	\$6.35	\$25.00	Mea
Drink Break	30	\$104.39	\$104.39	\$2.50	\$25.00	Hou

At the bottom of the window are three buttons: 'Okay' (with a checkmark icon), 'Cancel' (with an X icon), and 'Menu'.

Figure 14-17

4. Change the appropriate Event information, or click on the Menu button and change the appropriate Menu information.

When you added Menu items, the values in the Account, Tax, and Count fields were automatically set for that Menu item. To change the values for a Menu item, uncheck its checkbox, set the Account, Tax, and Count fields appropriately, and re-check the checkbox for the Menu item.

5. Click the OK button to close the Catering Menu Items window.
6. Click the OK button to close the Catering Event window.
7. Click the OK button to close the Catering Events window.

Delete a Catering Event

Make sure you are working with the conference that contains the catering Event you want to delete.

1. In the browse tree, expand Conferences and click Catering. The Catering wizard will appear on the main portion of the window.
2. Click the name of the catering Meeting that contains the catering Event you want to delete and click the Edit button on the toolbar. The Catering Events window will open.
3. Click the name of the Catering Event you want to delete and click the Delete button.
4. Click the OK button.

Section 15: Meeting Facilities Wizard

15 Meeting Facilities Wizard

The Meeting Facilities wizard allows you to track or charge for the use of meeting rooms or resources. Before you run the Meeting Facilities wizard, you must first enter your meeting facilities into Conference Programmer.

15.1 Creating a Meeting Room

1. In the browse tree, expand Setup and click Meeting Facilities and Resources. The Meeting Facilities and Resources window will open (Figure 15-1).

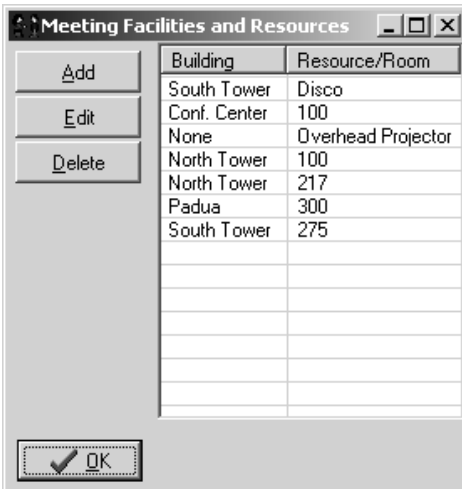


Figure 15-1

2. Click the Add button. A blank Meeting Facility/Resource window will open (Figure 15-2).

Meeting Facility/Resource

Description | Configurations

Resource Information

Building :

Room No. :

Phone :

Rate Hourly : Rate Daily :

Setup Rate : Sort Field :

Notes/Description

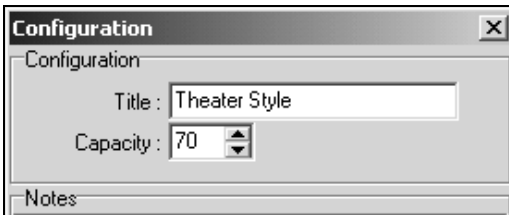
Figure 15-2

3. In the Building field, select the building in which the meeting room is located. In the Room No. field, type the room number of the meeting room - you can enter a room name here, which will probably make meeting room selection easier, but the name is limited to a maximum of 20 characters. If there is one, enter the phone number for the meeting room in the Phone field. Enter the hourly rental rate in the Rate Hourly field, the daily rental rate in the Rate Daily field, and the meeting room setup fee in the Setup Rate

Section 15: Meeting Facilities Wizard

field. If you do not charge for one or more of these items for this meeting room, leave the field blank or enter 0 (zero). Set the sort field to list the event in the order you want (see Section 1.11: Sort Fields). If there are any special notes about this meeting room, type them in the Notes/Description field.

4. Click the Configurations tab (Figure 15-3). This tab displays a list of all possible configurations/capacities for this meeting room. A default configuration is automatically created for each room, which you can edit or add to. If your meeting room has multiple configurations, click the Add button. The Configuration window will open (Figure 15-4).



Configuration

Configuration

Title : Theater Style

Capacity : 70

Notes

Figure 15-4



Meeting Facility/Resource

Description Configurations

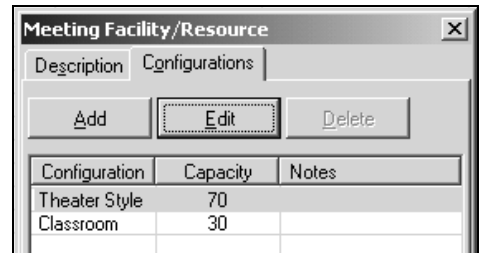
Add Edit Delete

Configuration	Capacity	Notes
Standard	0	Default configuration

OK Cancel

Figure 15-3

5. In the title field, type the name of this configuration. Set the Capacity field to the maximum possible capacity for this configuration. Click the OK button. Figure 15-5 shows all of the configurations for our example meeting room.



Meeting Facility/Resource

Description Configurations

Add Edit Delete

Configuration	Capacity	Notes
Theater Style	70	
Classroom	30	

Figure 15-5

6. Click the OK button. The added room will now appear in your list of meeting rooms and may now be reserved for a conference.

15.2 Entering a Resource

You can use the Meeting Facilities wizard to manage resources as well as meeting rooms. You can track resources such as overhead projectors, laptops, or PA loudspeakers, assuring that you don't double-book them and do charge appropriately for their use.

Section 15: Meeting Facilities Wizard

The process for entering resources is identical to that for entering meeting rooms, except that resources do not have a building nor a configuration. In the Building field, select “None.” You can leave the default configuration (“Standard” with a maximum capacity of zero). In the Room No. field, type the name of the resource; you are limited to a maximum of 20 characters (Figure 15-6). Click the OK button.



Figure 15-6

15.3 Reserving Meeting Facilities or Resources

Make sure you are working with the conference for which you want to reserve meeting rooms or resources.

1. In the browse tree, expand Conferences and click Meeting Facilities. The Meeting Facilities wizard will appear in the main portion of the window (Figure 15-7).



Figure 15-7

2. Click the Add button on the toolbar. The Facility Reservation window will open (Figure 15-8).
3. The Title field is automatically filled in with “General Use,” but you can change the name of this reservation to make it easy to identify in a list of reservations (you have a maximum of 50 characters). Set the Expected # field to the number of expected participants for this meeting; this will be used to determine if the meeting room you select has the capacity to hold all the participants.

Section 15: Meeting Facilities Wizard

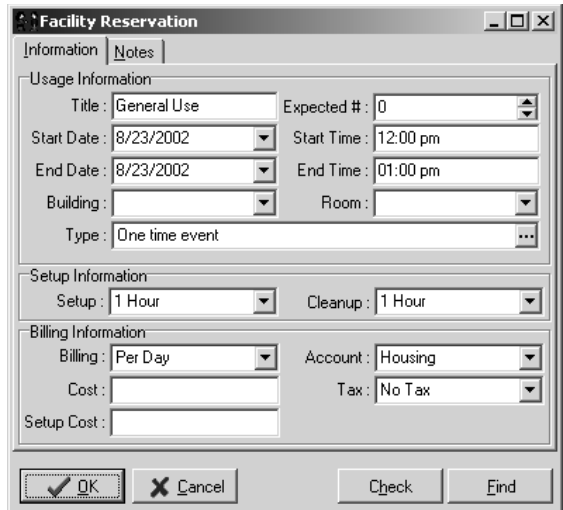
The Start Date and End Date fields are automatically filled in with the check-in date of the conference. You can change both fields to another day to reserve the meeting room on that day, or you can set the End Date field to a date later than the Start Date field, to reserve the facility for multiple days. Set the Start Time and End Time fields to the start and end time of the reservation - do not include the time to setup or clean up the meeting room here.

In the Building field, select the building in which the meeting room is located. In the Room field, select the name of the meeting room you want to reserve. There could be multiple listings of a meeting room name in the Room field drop-down list; each item is for a different configuration of that meeting room. Make sure you select the appropriate configuration.

The Type field is automatically set to “One Time Event,” which means that this meeting room reservation is for one occurrence. You can reserve the meeting room three ways: “One Time Event,” “Book Every Day,” or “Periodic” (Figure 15-9).

The Setup and Cleanup fields are automatically set to “1 Hour,” but you can change them if your meeting room setup or clean up times are different. You can also set either of these fields to 0 (zero).

The Billing, Cost, and Setup Cost fields are automatically filled in when you choose a meeting room; the default charges for that meeting room are used, but you can change any of the values for each reservation. In the Billing field, select whether you are charging for this reservation Per Hour, Per Day, as a Flat Fee, or not at all. Enter the charge for the reservation, if any, in the Cost field. If there is a separate fee that you charge for setup or clean up of the meeting room, type it in the Setup Cost field.

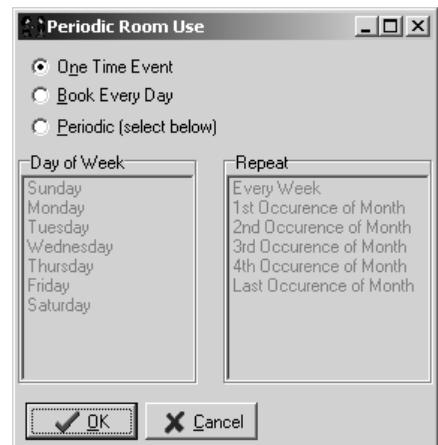


The screenshot shows the 'Facility Reservation' dialog box with the following fields and values:

- Usage Information:**
 - Title: General Use
 - Expected #: 0
 - Start Date: 8/23/2002
 - Start Time: 12:00 pm
 - End Date: 8/23/2002
 - End Time: 01:00 pm
 - Building: (empty)
 - Room: (empty)
 - Type: One time event
- Setup Information:**
 - Setup: 1 Hour
 - Cleanup: 1 Hour
- Billing Information:**
 - Billing: Per Day
 - Account: Housing
 - Cost: (empty)
 - Tax: No Tax
 - Setup Cost: (empty)

Buttons at the bottom: OK, Cancel, Check, Find.

Figure 15-8



The screenshot shows the 'Periodic Room Use' dialog box with the following options and fields:

- Event Type:**
 - One Time Event
 - Book Every Day
 - Periodic (select below)
- Day of Week:**
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
- Repeat:**
 - Every Week
 - 1st Occurrence of Month
 - 2nd Occurrence of Month
 - 3rd Occurrence of Month
 - 4th Occurrence of Month
 - Last Occurrence of Month

Buttons at the bottom: OK, Cancel.

Figure 15-9

Section 15: Meeting Facilities Wizard

In the Account field, select the account you want to track charges for your meeting rooms. Choose a tax rule in the Tax field - this field is required even if you do not charge tax.

4. To check for scheduling conflicts for the meeting room and dates and times you have selected, you can click the Check button. But when you click the OK button to save this reservation, the wizard will automatically check for conflicts. Click the OK button

If the wizard does not find any scheduling conflicts, it saves the reservations, and all meeting room reservations for the current conference are displayed on the screen.

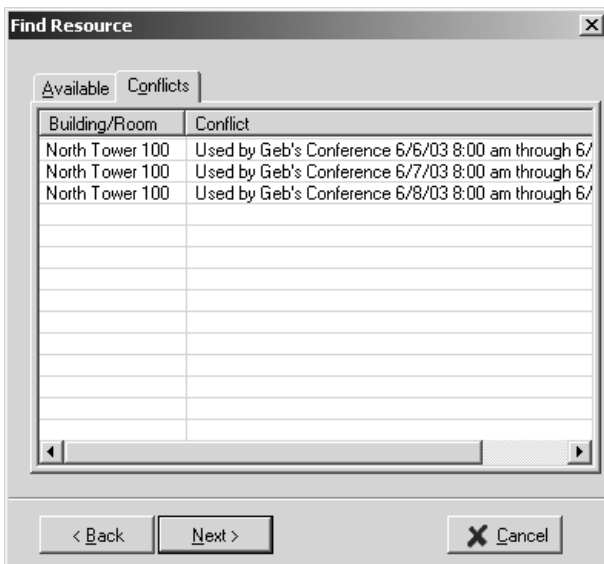


Figure 15-10

If the wizard detects a scheduling conflict, the Find Resource window opens (Figure 15-10) and warns you of the conflict. This list shows you the rooms you are trying to reserve and the conference that is already using them on your requested dates at your requested times.

5. Click the Cancel button to close the Find Resource window, then click the OK button to cancel the wizard (checking for conflicts actually runs another wizard, which we now want to close, as we return to the Meeting Facilities wizard).

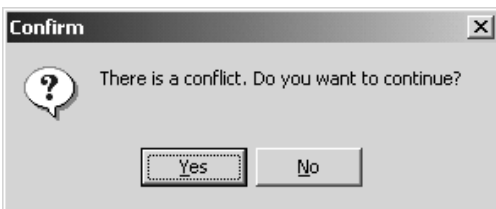


Figure 15-11

6. Another warning appears (Figure 15-11). If you want to save the reservation even though there is a conflict, click the Yes button - your reservation will be saved, and the meeting room or resource will be double-booked. If you want to choose another room or another date or time, click the No button, and change the parameters of your reservation before clicking the OK button again.

Section 15: Meeting Facilities Wizard

“One Time Event” Reservations

Make sure you are working with the conference for which you want to reserve meeting rooms.

1. In the browse tree, expand Conferences and click Meeting Facilities. The Meeting Facilities wizard will appear in the main portion of the window.
2. Click the Add button on the toolbar. Set the fields appropriately and set the Type field to “One Time Event” by clicking the ellipsis button (the button with three dots, to the right of the Type field), selecting “One Time Event,” and clicking the OK button.

“Book Every Day” Reservations

Make sure you are working with the conference for which you want to reserve meeting rooms.

1. In the browse tree, expand Conferences and click Meeting Facilities. The Meeting Facilities wizard will appear in the main portion of the window.
2. Click the Add button on the toolbar. Set the Start Date field to the first date of the reservation, set the End Date field to the last date of the reservation, and set the remaining fields appropriately. Then set the Type field to “Book Every Day” by clicking the ellipsis button (the button with three dots, to the right of the Type field), selecting “Book Every Day,” and clicking the OK button. This will reserve a meeting room for every day within the date range you selected.

“Periodic” Reservations

Using Periodic reservations you can reserve a meeting room for a certain time of day on every Tuesday, Thursday, and Friday within a date range.

Make sure you are working with the conference for which you want to reserve meeting rooms.

1. In the browse tree, expand Conferences and click Meeting Facilities. The Meeting Facilities wizard will appear in the main portion of the window.

Section 15: Meeting Facilities Wizard

2. Click the Add button on the toolbar. Set the Start Date field to the first date of the reservation, set the End Date field to the last date of the reservation, and set the remaining fields appropriately. Then set the Type field to “Periodic” by clicking the ellipsis button (the button with three dots, to the right of the Type field) and selecting “Periodic.” Notice that the bottom portion of the Periodic Room Use window now allows you to make changes to those fields.

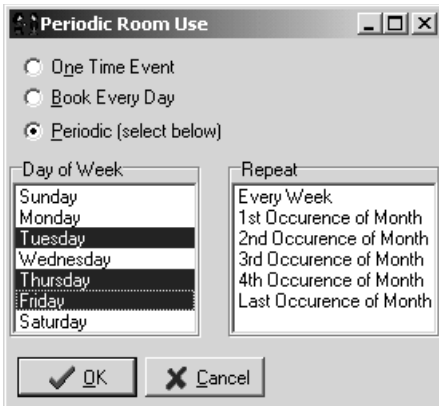


Figure 15-12

3. In the Day of Week field, click “Tuesday.” Hold the Control key on the keyboard down and click “Thursday” and “Friday,” then release the Control key (Figure 15-12).

In the Repeat field, select the condition that meets the needs of this reservation. In this example, we chose “3rd Occurrence of the Month” based upon our date range of 03/15/02 to 03/25/02. We could also have selected “Every Week” to reserve the meeting room on every Tuesday, Thursday, and Friday within our date range.

Click the OK button.

15.4 Find Meeting Room Availability

If you know the dates and times you want to reserve a meeting room, but are unsure what meeting rooms are available, you can tell Conference Programmer to find all meeting rooms that are available within your selected dates and times.

Make sure you are working with the conference for which you want to reserve meeting rooms.

1. In the browse tree, expand Conferences and click Meeting Facilities. The Meeting Facilities wizard will appear in the main portion of the window.
2. Click the Add button on the toolbar and set the fields appropriately (see Section 15.3: Reserving Meeting Facilities or Resources). You can leave the Building and Room fields blank, since the Find wizard will be finding buildings and meeting rooms for you.

Section 15: Meeting Facilities Wizard

- Click the Find button (Figure 15-13). The Find Resource window will open (Figure 15-14).

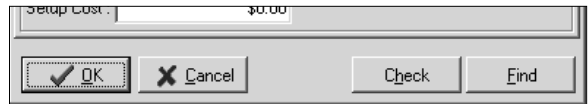


Figure 15-13

- Check the checkbox next to each building you want to search for available meeting rooms. You can check all or none of the checkboxes by clicking the Select All or Clear All buttons, respectively. Select “Any Capacity” to search for meeting rooms with any maximum capacity, or select “Capacity Range” and set the At Least field to the smallest maximum capacity meeting room you want to find. Click the Next button.

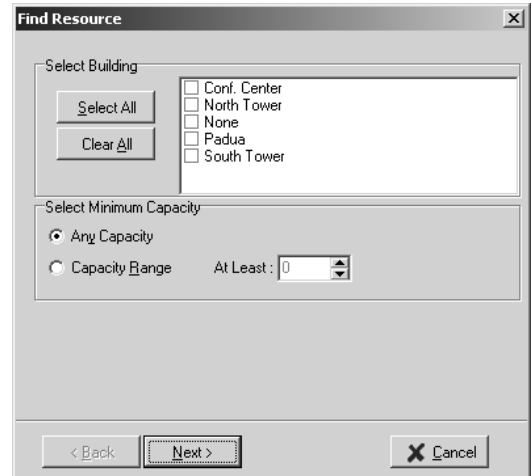


Figure 15-14

- The Find Resource window displays the Available tab, and lists all meeting rooms that meet your scheduling criteria, if there are any (Figure 15-15).
- To use one of the listed meeting rooms in your reservation, double-click on the name of the meeting room. Click the OK button when asked to confirm that you want to use that meeting room for you reservation (Figure 15-16).

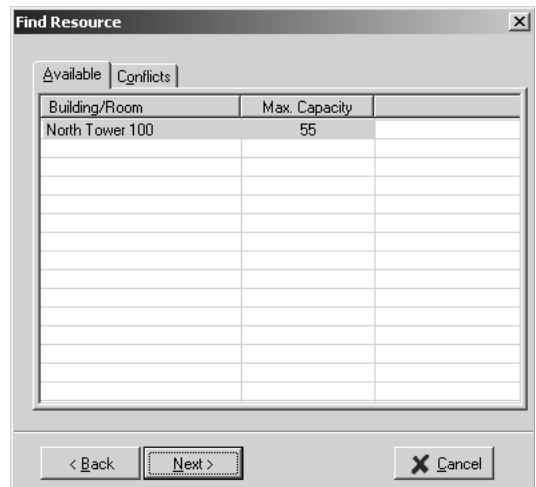


Figure 15-15

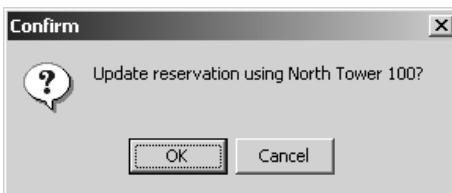


Figure 15-16

Section 16: Reports

16 Reports

Conference Programmer comes with a standard report pack containing more than 60 reports to summarize, organize, and distribute your conferencing information. The reports were created in Crystal Decisions' Crystal Reports.

16.1 Viewing Reports

1. In the browse tree, expand Reports. Figure 16-1 shows the report categories, with the "(1) Overview" report folder (report folder #1) expanded further, showing some reports.

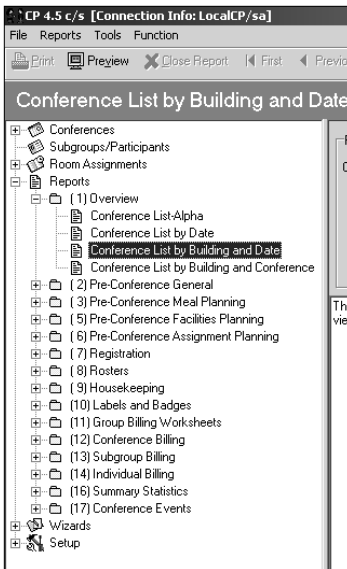


Figure 16-1

2. Click the name of a report to view it. In this example, we clicked "Conference List by Building and Date." The Report Parameters appear in the main portion of the window (Figure 16-2).

To view a report, you first need to tell Conference Programmer what data you want to report on, using the report parameter fields. Different reports require different information. If a report parameter field is gray, and you cannot enter or select any information in that field, then the report does not need any information in that field. In this example, the "Conference List by Building and Date" report does not need any information in the Conference, Event, Status, Facility, or Sort fields.

A screenshot of the "Report Parameters" dialog box. The dialog is divided into two sections: "Report Parameters" and "Date Parameters and Sort". Under "Report Parameters", there are five fields: "Conference:" (gray), "Building:" (yellow), "Event:" (gray), "Status:" (gray), and "Facility:" (gray). Under "Date Parameters and Sort", there are four fields: "Beginning Date:" (1/1/2001), "Ending Date:" (12/31/2002), and "Sort:" (gray). At the bottom, there is a text box containing the message: "This report lists conferences by building and sorted by check in date. You must choose a date range and you may choose a particular building to view this report."

Figure 16-2

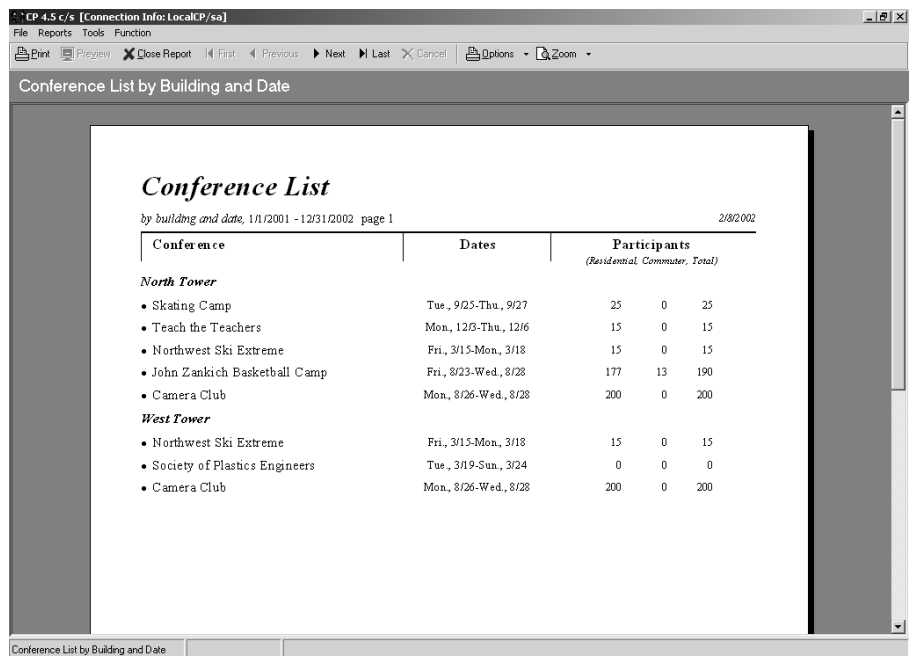
If a field is yellow, as the Building field is in this example, then you can select information in that field if you want to make the report more specific. If you do not enter or select any information in yellow fields, the report will

Section 16: Reports

show the appropriate information for every possible selection in that field. In this example, if you do not select a building in the Building field, the report will show conferences in all buildings. If you do select a building in the Building field, the report will only show conferences in the selected building.

Fields that are white are necessary - the report cannot function if there is no information in the white fields. In this example, the Beginning Date and Ending Date fields are filled in, so the report can find information to report on. If the Beginning Date and Ending Date fields were not filled in, the report could not process any information, and would inform you that it needed more information.

3. Click the Preview button on the toolbar. The report preview fills the entire window (Figure 16-3).



CP 4.5 c/s [Connection Info: Local/CP/sa]

File Reports Tools Function

Print Preview Close Report First Previous Next Last Cancel Options Zoom

Conference List by Building and Date

Conference List

by building and date, 1/1/2001 - 12/31/2002 page 1 2/8/2002

Conference	Dates	Participants (Residential, Commuter, Total)		
North Tower				
• Skating Camp	Tue., 9/25-Thu., 9/27	25	0	25
• Teach the Teachers	Mon., 12/3-Thu., 12/6	15	0	15
• Northwest Ski Extreme	Fri., 3/15-Mon., 3/18	15	0	15
• John Zankich Basketball Camp	Fri., 8/23-Wed., 8/28	177	13	190
• Camera Club	Mon., 8/26-Wed., 8/28	200	0	200
West Tower				
• Northwest Ski Extreme	Fri., 3/15-Mon., 3/18	15	0	15
• Society of Plastics Engineers	Tue., 3/19-Sun., 3/24	0	0	0
• Camera Club	Mon., 8/26-Wed., 8/28	200	0	200

Conference List by Building and Date

Figure 16-3

You can navigate through the pages of a report by clicking the First, Previous, Next, and Last buttons on the toolbar (Figure 16-4). Click the Print button on the toolbar to print the report. Click the Zoom button on the toolbar and select a zoom percentage to view more or less of the report on the screen at a time.

Section 16: Reports

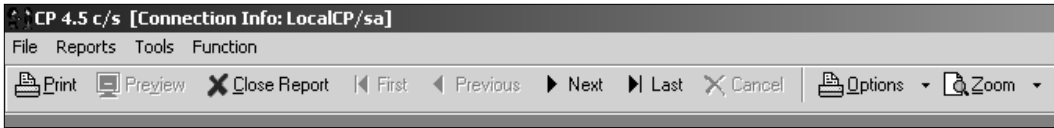


Figure 16-4

4. Click the Close Report button on the toolbar to close the report.

16.2 Exporting Reports

You can export any of the reports to a number of different formats. One reason you might want to do this is to put the report information into a Microsoft Excel file that you can give to your customer so they can manipulate the data (see Section 2.3: Import Wizard).

1. In the browse tree, expand Reports, then expand the report folder that contains the report you want to export and click the report name.
2. Select the appropriate report criteria (see Section 16.1: Viewing Reports) and click the Preview button on the toolbar.
3. Click the Options button on the toolbar and select Export. The Export window will open (Figure 16-5).

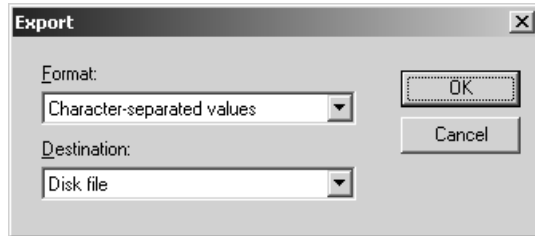


Figure 16-5

4. In the Format field, select the type of file you want to export to. The most common selection will probably be Excel (which version of Excel you export to will depend on which version of Microsoft Excel you or your customer will use, but most versions of Excel can read older and newer versions of Excel files). Leave the Destination field set to "Disk file."
5. Click the OK button. The Choose Export File window will open (Figure 16-6). The window you see may look different, depending on which version of Microsoft Windows you are using.

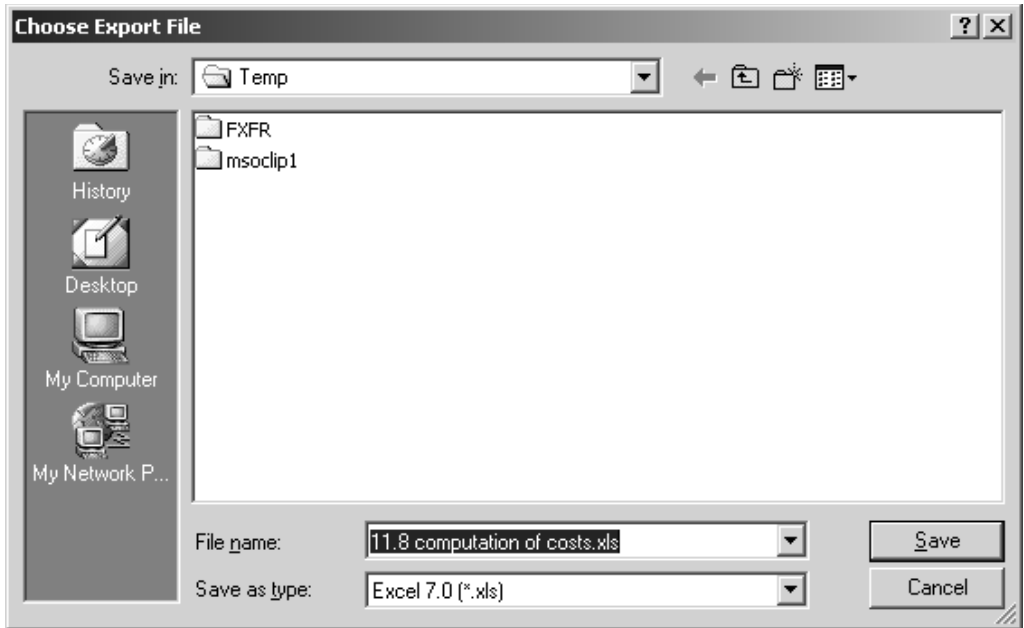


Figure 16-6

6. Select where you want to save the file in the Save In field. In the File Name field, type a name for your file. Click the Save button. Conference Programmer exports the report - this may happen so fast that you won't even see it.
7. Click the Close Report button on the toolbar. You can now open your new file in the appropriate program - in this example, open the new file in Microsoft Excel.

16.3 Adding New Reports

If you or your IT department own and are proficient in using Crystal Reports, you can create your own custom reports from scratch.

1. Create a Crystal Report file from scratch. You might want to duplicate one of our report files that display similar information (see Section 16.5: Editing Reports) so you can see which tables we used and how we linked them.
2. In the browse tree in Conference Programmer, expand Reports, then expand any report folder and click any report name. It doesn't matter which report you click; we just want the report tools to appear in the toolbar (Figure 16-7).

Section 16: Reports

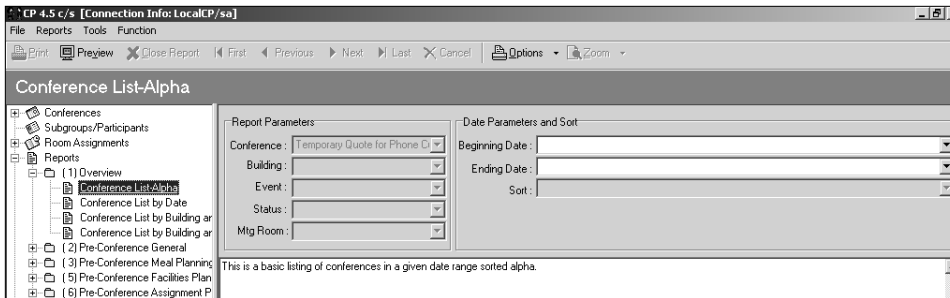


Figure 16-7



Figure 16-8

3. Click the Options button on the toolbar and select Add Report To Tree. The Report Properties window will open (Figure 16-8).

4. Click the ellipsis button (the button with three dots, to the right of the Select Report field). The Select Report window will open (Figure 16-9).

Note: It is easy to accidentally delete or replace your reports while in the Select Report window; be careful here! Once a report is deleted or replaced, it is very difficult, and sometimes impossible, to get it back.

5. Click the Load button. The Select Report window will open (Figure 16-10).

6. Navigate to and select your Crystal Report file and click the Open button. The report file is imported into the database and shows up in the list of all the reports (Figure 16-9).

7. Click on the name of the report you just added and click the OK button to close the Select Report window.

8. In the What Title Do You Want For This Report field, type a name for this report - this name will show up in the browse tree.

9. In the In What Folder Should This Report Be Located field, select which report folder you want this

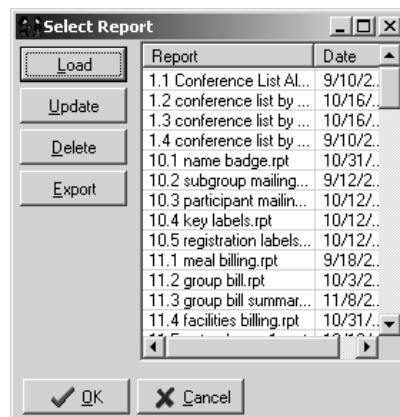


Figure 16-9

Section 16: Reports

report to display in the browse tree (see Section 16.4: Report Folders).

10. Set the What Order Do You Want This Report To Appear field appropriately (see Section 1.11: Sort Fields).
11. Click the Filtering Instructions tab (Figure 16–11). In the field, type the filtering instructions.

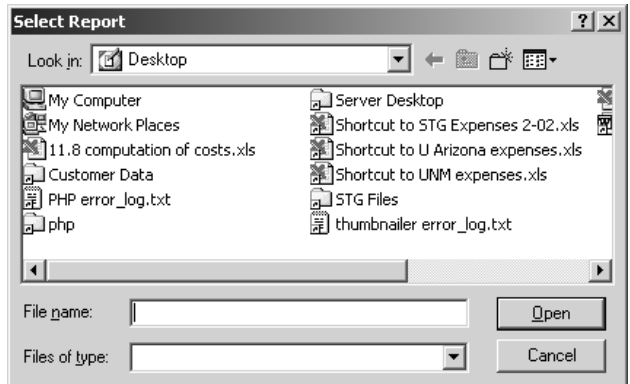


Figure 16-10

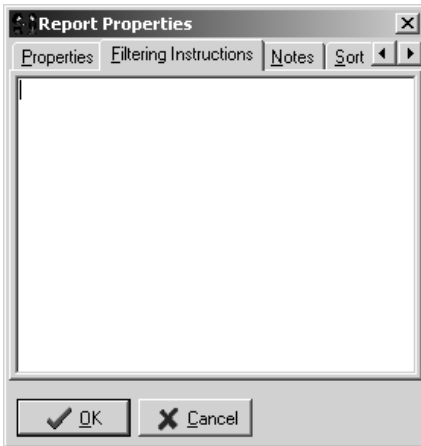


Figure 16-11

There is a special language to use here - a combination of Crystal Reports functions and certain Conference Programmer syntax. You can view the properties of an existing report to learn how we use the Filtering Instructions field (see Section 16.5: Editing Reports).

12. Click the Notes tab. In the field, type a brief description of the report (up to a maximum of 200 characters). This note appears in the report parameters portion of the window, and should tell the viewer what it will report, what it requires as a report parameter, or anything special about the report.
13. Click the Sort tab. In this field, you can enter sort options for the report. If the report is rather simple (if it does not contain groups), you can use the Sort field to allow the user to view the report in different sort orders without having to create separate Crystal Report files. The language structure here is simple: Type the name of one sort option, surrounded by square brackets []. Following that, type the name of the fields (including the table name) in the

Section 16: Reports



Figure 16-12

order you want them to sort, surrounded by braces { }. Repeat this for other sort options. Figure 16-12 shows an example where we are setting up three possible sorting options: “Sort by First Name,” “Sort by Last Name, then First Name,” and “Sort by High School.” For the “High School” sort option, we designated one of the user-definable fields of the Participants Additional Info tab as the field to contain the “High School” information.

14. The Formulas tab is for advanced report functionality and should be left for Seattle Technology Group, Inc. use only.

16.4 Report Folders

You can reorganize the reports in the reports folder by adding, renaming, or deleting report folders.

Add a Report Folder

1. In the browse tree, expand Reports, then expand any report folder and click any report name. It doesn't matter which report you click; we just want the report tools to appear in the toolbar.
2. Click the Options button on the toolbar and select Edit Properties. The Report Properties window will open (Figure 16-13).
3. Click the Folders button. The Report Folders window will open (Figure 16-14).
4. Type the name of the new folder in the field and click the Add button. Folders are listed in the browse tree and in this list in alphanumeric order, which is why we named our report folders with numbers

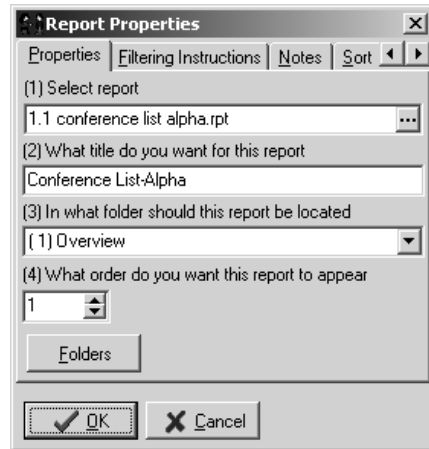


Figure 16-13

Section 16: Reports

before the descriptive names; we want them to list in the order of the numbers, but we want the descriptive name to explain what kind of reports will be in the folder.

5. Click the OK button to close the Report Folders window.
6. Click the Cancel button to close the Report Properties window. We click the Cancel button here because, although we made changes to the report folders, we did not want to make changes to the properties of the report we originally selected in step 1.



Figure 16-14

When you add a report folder, it does not show up in the browse tree until you have assigned a report to be in that report folder (see Sections 16.3: Adding New Reports or 16.5: Editing Reports).

Rename a Report Folder

1. In the browse tree, expand Reports, then expand any report folder and click any report name. It doesn't matter which report you click; we just want the report tools to appear in the toolbar.
2. Click the Options button on the toolbar and select Edit Properties. The Report Properties window will open.
3. Click the Folders button. The Report Folders window will open.
4. Click on the name of the report folder you want to rename and click the Rename button. The Enter Caption window will open (Figure 16-15).
5. Type the new name of the report folder and click the OK button.
6. Click the OK button to close the Report Folders window.
6. Click the Cancel button to close the Report Properties window. We click the Cancel button here because, although we made changes

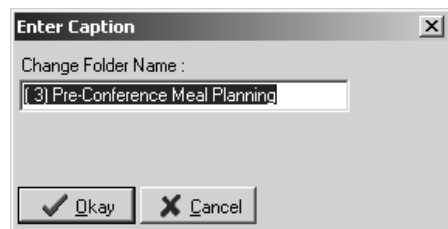


Figure 16-15

Section 16: Reports

to the report folders, we did not want to make changes to the properties of the report we originally selected in step 1.

Delete a Report Folder

1. In the browse tree, expand Reports, then expand any report folder and click any report name. It doesn't matter which report you click; we just want the report tools to appear in the toolbar.
2. Click the Options button on the toolbar and select Edit Properties. The Report Properties window will open.
3. Click the Folders button. The Report Folders window will open.
4. Click on the name of the report folder you want to delete and click the Delete button. If you are trying to delete a report folder that contains reports, you will get a warning message (Figure 16-16); you will have to either delete the reports within this report folder (see Section 16.6: Deleting Reports) or move the reports to another folder (see Section 16.5: Editing Reports) before you can delete it.

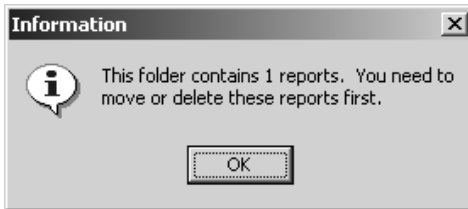


Figure 16-16

5. Click the OK button to close the Report Folders window.
6. Click the Cancel button to close the Report Properties window. We click the Cancel button here because, although we made changes to the report folders, we did not want to make changes to the properties of the report we originally selected in step 1.

16.5 Editing Reports

There are two ways to edit a report in Conference Programmer. You can modify the report properties, or you can modify the report itself using Crystal Decisions' Crystal Reports. Once a report has been "plugged-in" to Conference Programmer, the main reason to modify the report properties is to change the note that appears before you run the report, which explains what the report will do.

Modify Report Properties

1. In the browse tree, expand Reports, then expand the report folder that contains the report whose properties you want to modify and click that report name.
2. Click the Options button on the toolbar and select Edit Properties. The Report Properties window will open.
3. Click the Notes tab. Change the appropriate information and then click the OK button.

You can change the information on any of the Report Properties tabs using this method, but doing so may result in the report not working or possibly causing Conference Programmer to crash.

Modify a Report With Crystal Reports

1. In the browse tree, expand Reports, then expand the report folder that contains the report you want to edit and click that report name.
2. Click the Options button on the toolbar and select Edit Properties. The Report Properties window will open.
3. Click the ellipsis button (the button with three dots, to the right of the Select Report field). The Select Report window will open.
4. Scroll through the list of reports in Conference Programmer and click the name of the report file you want to edit. Click the Export button. The Browse For Folder window will open.
5. Select where on your computer you want to export the report to and click the OK button; we suggest your Desktop.
6. Click the Cancel button to close the Select Report window.
7. Click the Cancel button to close the Report Properties window.
8. Modify the report in Crystal Decisions' Crystal Reports and save it.

Refer to your Crystal Reports manuals for assistance in working with or understanding Crystal Reports.

9. In the browse tree in Conference Programmer, expand Reports, then expand the report folder that contains the report you just modified and click that report name.

Section 16: Reports

10. Click the Options button on the toolbar and select Update Report. The Select Report window will open.
11. Navigate to the report file you just saved, click on it, and click the Open button. Your report is uploaded into Conference Programmer.

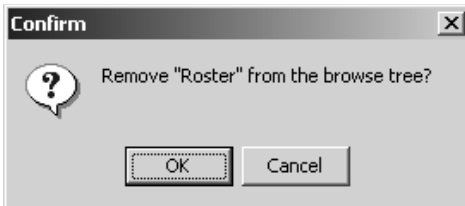
When you use the Update Report Functionality, the report file that you upload from your computer into Conference Programmer replaces whatever report file the report was previously pointing to. For example, if you export the report file “1.1 Roster.rpt” from Conference Programmer to your computer, modify it, and save the modified report file as “New Roster.rpt,” then when you use the Update Report function, the old report (“1.1 Roster.rpt”) will be removed from Conference Programmer permanently and will be replaced by “New Roster.rpt.” To add a new report to the report tree without replacing any reports, use the Load button to find your report and upload it into Conference Programmer (see Section 16.3: Adding New Reports).

16.6 Deleting Reports

There are two ways to delete a report. You can remove a report from the browse tree, so that no one can see it or use it (but so that it remains in the Conference Programmer database, making it easy to add later if you want), or you can delete the report from the Conference Programmer database so that it no longer exists. If you want to use a report again in the future and you use the second method to delete the report from Conference Programmer, you will have to recreate the report from scratch in Crystal Decisions’ Crystal Reports.

Remove a Report From the Browse Tree

1. In the browse tree, expand Reports, then expand the report folder that contains the report you want to remove from the browse-tree and click that report name.



2. Click the Options button on the toolbar and select Delete Report. Click the OK button when asked to confirm that you want to delete the report (Figure 16-17).

Figure 16-17

Section 16: Reports

Delete a Report From Conference Programmer

1. In the browse tree, expand Reports, then expand any report folder and click any report name. It doesn't matter which report you click; we just want the report tools to appear in the toolbar.
2. Click the Options button on the toolbar and select Edit Properties. The Report Properties window will open.
3. Click the ellipsis button (the button with three dots, to the right of the Select Report field). The Select Report window will open (Figure 16-18).
4. Click the name of the report that you want to delete and click the Delete button. If the report is in use in the browse tree, you will get a warning message (Figure 16-19); you will have to remove the listed reports from the browse tree before you can delete this report from Conference Programmer.

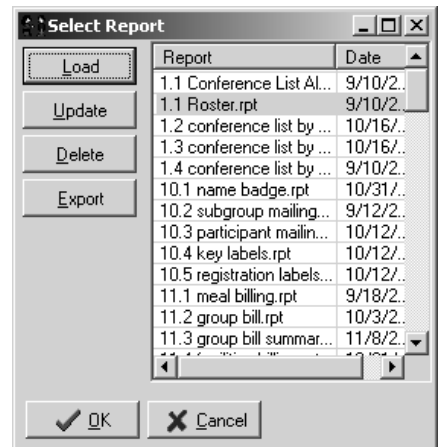


Figure 16-18



Figure 16-19

5. Click the OK button to close the Select Report window.
6. Click the OK button to close the Report Properties window.

Section 17: Miscellaneous Functions

17 Miscellaneous Functions

17.1 Changing a Field Label

You can change the names of the fields in Conference Programmer, which makes things easier to understand if you use a field for something other than what it was designed, or when you use the custom fields.

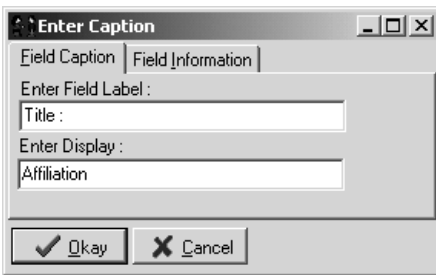


Figure 17-1

1. From the Tools menu, select Field Label Edit. If Field Label Edit mode is on, the menu item “Field Label Edit” will have a checkmark next to it - selecting it again in the menu will toggle Field Label Edit mode off and remove the checkmark.
2. Double-click the name of the field you want to change. The Enter Caption window will open (Figure 17-1).
3. In the Enter Field Label field, type what you want the field to be named; what you want to be displayed next to the field in Conference Programmer (up to a maximum of 20 characters). In the Enter Display field, type a brief description of the field (up to a maximum of 40 characters). Sometimes in Conference Programmer, you get a list of all fields (such as when using the Conference Export wizard). This Display Name appears in those lists. The field name is usually much shorter than the display name, because there is so little room in the Conference Programmer windows to fit field names, but display names can be longer. In this example, there is only room on the screen to display “Title :” as a field name, but to make things clear we are calling that field “Affiliation :” as a display name.

17.2 Changing a Drop-Down List

In almost every field that contains a drop-down list, you can customize the drop-down list to contain the items you want. For example, on the Participants Additional Info tab, the Meal Plan field can be customized to display “Meal Plan A” and “Meal Plan B” in the drop-down list.

1. Click in the field as if you are about to type some information. Hold the Control and Shift keys on the keyboard down, and press

Section 17: Miscellaneous Functions

the “L” key on the keyboard. The Lookup List window will open (Figure 17-2).

2. Click in the field at the top of the window and type an item you want displayed in the drop-down list. Click the Add button. The item you added appears in the list. Repeat this step until all the items are added.

You can change the order of these items in the drop-down list. Click on one of the list items in the list and click the Up or Down button to move this item up or down in the list, respectively

3. Click the OK button.

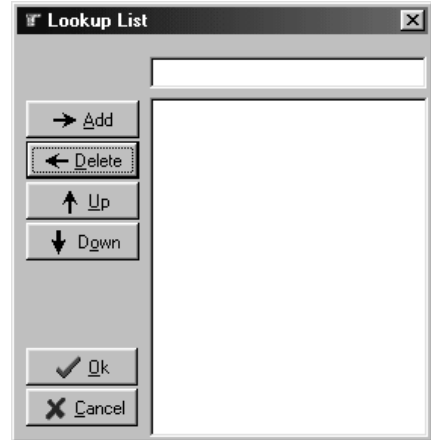


Figure 17-2

17.3 Copying Elements Between Conferences

To help save you time, you can copy various parts of one conference to another conference. This is exceptionally helpful when setting up conferences for the first time; you can copy the Service, Transaction, and Events Templates from a template conference, so you do not need to recreate these templates for each conference. You can also copy the contact information from one conference to another, which is useful when you have one contact person for multiple conferences.

Make sure you are working with the conference that you want to copy information to.

1. In the browse tree, click Conferences, click the General tab, click the Procedures button on the toolbar, and select Copy Templates. The Copy Conference window will open (Figure 17-3).
2. In the Copy From field, select the conference from which you want to copy information.
3. Check the checkboxes next to the items you want to copy to the new conference. Click the OK button.



Figure 17-3

Section 17: Miscellaneous Functions

Note that when copying something to a conference, if it already exists you will have two copies! For example, if Conference A has Service Template items, and you copy the Service Template from Conference B, Conference A will now have all Service Template items from Conference A *and* from Conference B! If there are multiple Service Template items for the same field, a problem will occur when you try to add a participant. If this happened with the Transaction Template, Conference Programmer would apply each charge multiple times per participant!



Figure 17-4

Figure 17-4 shows that we are about to copy the Service Template and Transaction Template from the “ TEMPLATE” conference to the conference we are working with.

17.4 Security Wizard

Use the Security Wizard to manage group and individual access to Conference Programmer, and to add, edit, or remove users. When working in the Security wizard, the changes you make do not take affect until you click the Next button to close the wizard and save all the changes.

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard (Figure 17-5).

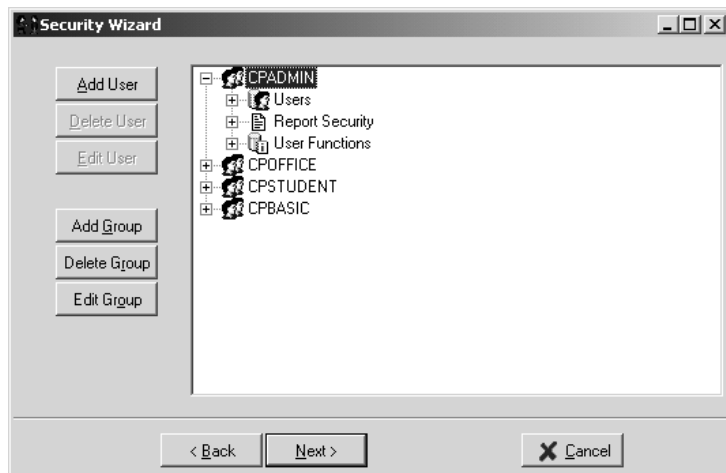


Figure 17-5

Section 17: Miscellaneous Functions

2. The list in the main portion of the window shows the security groups. Expand a group to see the Users, Report Security, and User Functions areas. Expand the Users area to see all the users in this security group. The Report Security lists all reports in Conference Programmer and allows you to turn access to each report on or off for this security group. The User Functions area lists all functions of Conference Programmer and allows you to turn access to each on or off for this security group.
3. When you are finished making changes to the security settings, click the Next button to close the Security wizard and save your changes.

Add a Security Group

While you can add Security Groups to Conference Programmer, the groups will also need to be added to the back-end database. Contact your IT department or Seattle Technology Group, Inc. for help with this.

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.
2. Click the Add Group button. The Enter Group Name window will open (Figure 17-6).
3. In the Group Name field, type the name of the security group and click the OK button.
4. Click the Next button to close the Security wizard and save your changes.



Figure 17-6

Edit a Security Group

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.



2. Click on the name of the group you want to change and click the Edit Group button. The Edit Group Name window will open (Figure 17-7).

Figure 17-7

Section 17: Miscellaneous Functions

3. In the Group Name field, type the new name for the group and click the OK button.
4. Click the Next button to close the Security wizard and save your changes.

Add a User

While you can add users to Conference Programmer, the users will also need to be added to the back-end database. Contact your Database IT department or Seattle Technology Group, Inc. for help with this.

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.



2. Click the Add User button (To automatically add a user to a particular group, first click the group name and then click the Add User button). The Create User window will open (Figure 17-8).
3. In the User Name field, type the name the user will use to log on to Conference Programmer. In the Password and Confirm fields, type the password you want this user to use to log on. For additional security, asterisks (*) will appear instead of the letters and numbers you type for the password.

Figure 17-8

In the User Group field, select the security group you want the user to be in, if the correct group is not already selected.

In the First Name, Last Name, and Initials fields, type the user's first, last name, and initials (the user's name and initials are used to track which user does what in the Conference Programmer). Click the OK button.

4. Click the Next button to close the Security wizard and save your changes.

Edit User Information

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.

Section 17: Miscellaneous Functions

2. Expand the security group the user is in, then expand the Users area and click on the user name you want to edit.
3. Click the Edit User button (or double-click the user name). The Create User window will open (Figure 17-8).
4. Change the appropriate information and click the OK button.
5. Click the Next button to close the Security wizard and save your changes.

Move Users From One Security Group To Another

There are two ways to move users between security groups once you are in the security wizard.

One is to click the user name, hold the mouse button down, and drag that user to the new security group. You can drag the user to the security group name, or to the Users area of that security group.

The other way is to edit a user's information and set the User Group field to the new group, then click the OK button.

Delete a User

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.
2. Expand the security group the user is in, then expand the Users area and click on the user name you want to delete.
3. Click the Delete User button.
4. Click the Next button to close the Security wizard and save your changes.

Edit Rights For a Security Group

1. In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.
2. Expand the security group you want to work with, then expand the User Functions area.

Section 17: Miscellaneous Functions

- The list in the main portion of the window shows categories of user functions that you can control access to (Figure 17-9). Each category contains a list of specific functions that you can control access to for the current security group. A check mark next to a function means that the security group has the rights to do or see that function; no check mark means no rights.

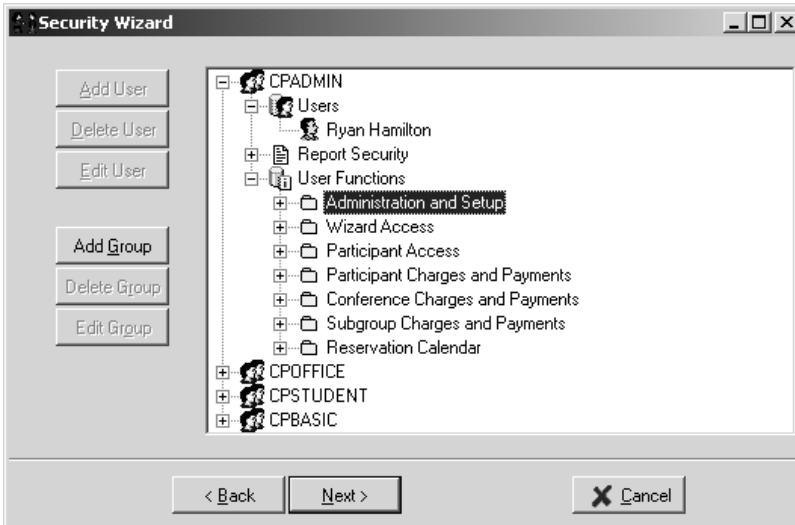


Figure 17-9

- Click the Next button to close the Security wizard and save your changes.

Edit Report Access For a Security Group

- In the browse tree, expand Setup and click Security Wizard. The Security Wizard window will open. Click the Next button to start the Security Wizard.
- Expand the security group you want to work with, then expand the Report Security area.
- The list in the main portion of the window shows report folders, organized as they are in the Reports section of the browse tree, that you can control access to (Figure 17-10). You can toggle the ability of the security group to view each report. A check mark next to a report name means that the security group has the rights to view that report; no check mark means the users in the security group cannot view the report.

Section 17: Miscellaneous Functions

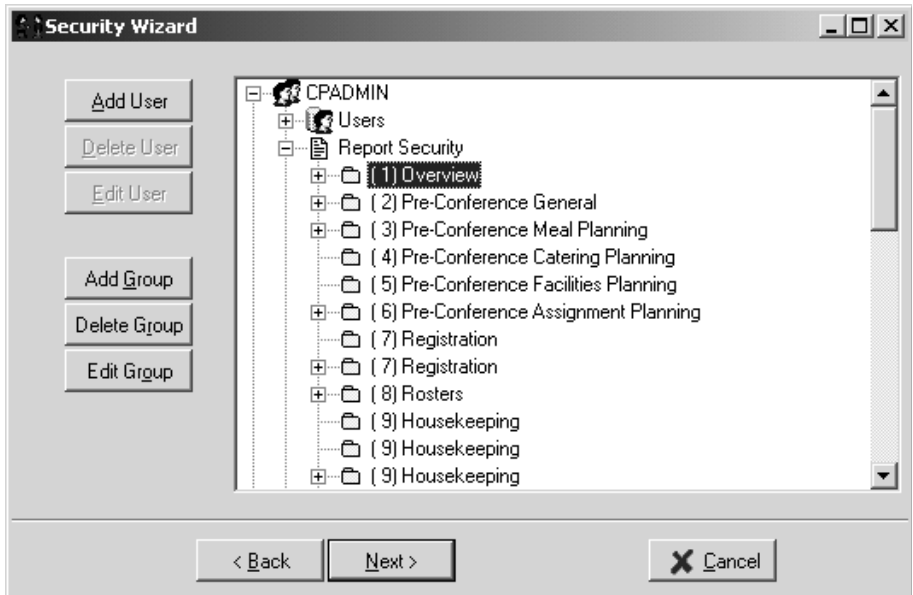


Figure 17-10

4. Click the Next button to close the Security wizard and save your changes.

17.5 Buildings and Rooms

Before you can add residence rooms, meeting rooms, or dining halls to Conference Programmer, you must first add the necessary buildings to your inventory.

Add a Building

1. In the browse tree, expand Setup and click Buildings and Rooms. The Buildings and Rooms window will open (Figure 17-11).
2. Click the Building button. The Building List window will open (Figure 17-12).



Figure 17-11

Section 17: Miscellaneous Functions



Figure 17-12

3. Click the Add button. The Building Information window will open (Figure 17-13).

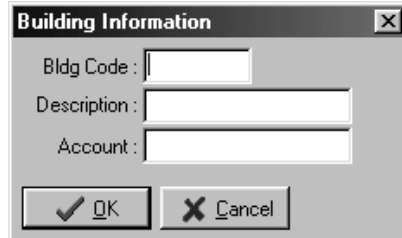


Figure 17-13

4. In the Bldg Code field, type the building code. The building code is a six-character (maximum) group of letters or numbers to uniquely identify each building - each building must have a unique building code! When multiple buildings are listed, they are always listed alphanumerically by building code.

In the Description field, type the name of the building.

The Account field is optional. Some universities track each building's charges to a separate account number. Figure 17-12 shows a list of buildings with account numbers. You may have several buildings with the same account number, as in this example, where the North and West Towers share an account number. You may want to consult your accounting department. Click the OK button.

7. Click the OK button to close the Building and Rooms wizard.

Edit a Building

1. In the browse tree, expand Setup and click Buildings and Rooms. The Buildings and Rooms window will open.
2. Click the Building button. The Building List window will open.
3. Click the building name you want to edit and click the Edit button (or double-click the building name). The Building Information window will open (Figure 17-13).
4. Change the appropriate information and click the OK button.

Section 17: Miscellaneous Functions

5. Click the OK button to close the Building List window.
6. Click the OK button to close the Buildings and Rooms window.

Delete a Building

1. In the browse tree, expand Setup and click Buildings and Rooms. The Buildings and Rooms window will open.
2. Click the Building button. The Building List window will open.
3. Click the building name you want to delete and click the Delete button.
4. Click the OK button to close the Building List window.
5. Click the OK button to close the Buildings and Rooms window.

Add a Residence Room

Before you can add residence rooms to Conference Programmer, you must first add the necessary buildings to your inventory.

1. In the browse tree, expand Setup and click Buildings and Rooms. The Buildings and Rooms window will open (Figure 17-14).
2. In the Select Building field, select the building you want to add a room to (Figure 17-15). All the rooms currently in the selected building will now be listed (Figure 17-16).

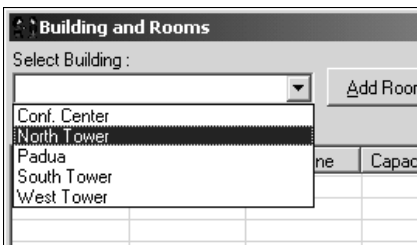


Figure 17-15

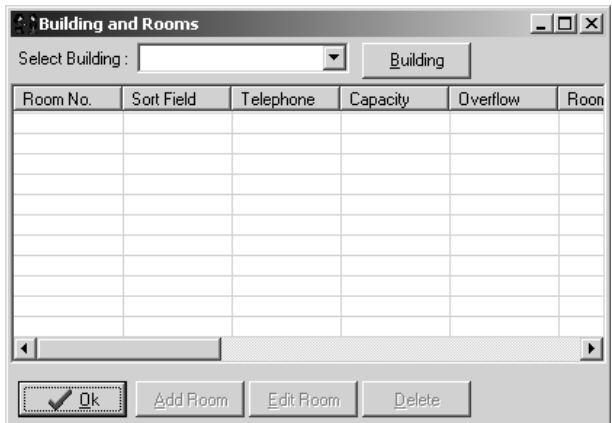


Figure 17-14

Section 17: Miscellaneous Functions

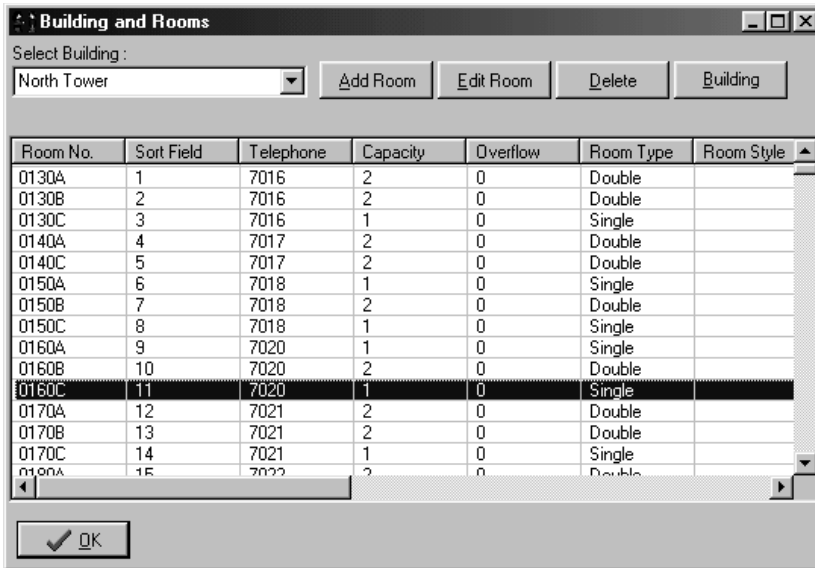


Figure 17-16

3. Click the Add Room button. The Enter Room Information window will open (Figure 17-17).

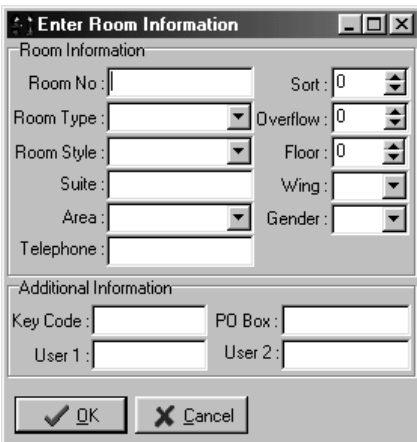


Figure 17-17

4. In the Room No. field, type the room number - this can be any combination of characters or numbers (up to a maximum of 10 characters). In the Room Type field, select the type for this room (see Section 17.6: Room Types). Set the Floor field to the appropriate floor number for this room. These fields are the only required fields to create a room, but you may want to add more specific information about the room, such as telephone number, room style, key number, wing and suite numbers, and whether this room can be an overflow room. Set the sort field to list the event in the order you want (see Section 1.11: Sort Fields).

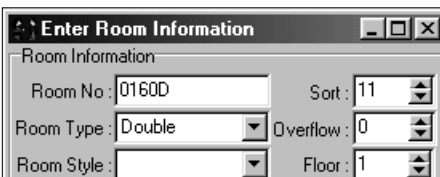


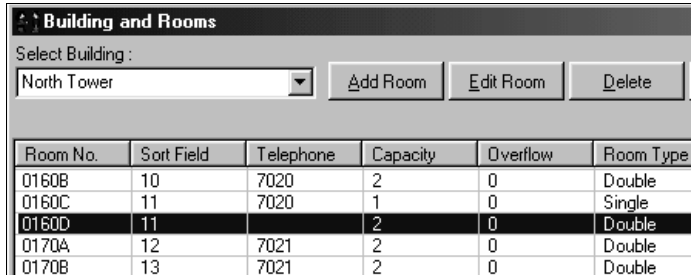
Figure 17-18

In this example, we are adding room 0170D (Figure 17-18). We set the Sort field to 11.

When you click the OK button, the new room will fall into place below room 0170C because,

Section 17: Miscellaneous Functions

although it has the same Sort field value as room 0170D, room 0170C was entered into Conference Programmer before room 1060D (Figure 17-19).



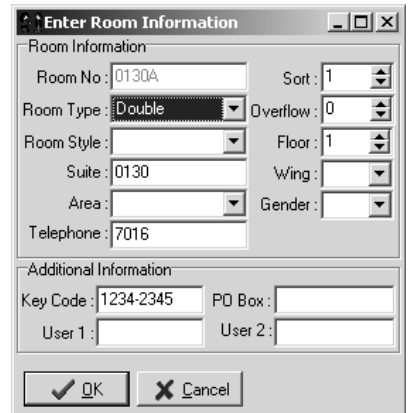
Room No.	Sort Field	Telephone	Capacity	Overflow	Room Type
0160B	10	7020	2	0	Double
0160C	11	7020	1	0	Single
0160D	11	7020	2	0	Double
0170A	12	7021	2	0	Double
0170B	13	7021	2	0	Double

Figure 17-19

5. Click the OK button to close the Enter Room Information window.
6. Click the OK button to close the Buildings and Rooms window.

Edit a Residence Room

1. In the browse tree, expand Setup and click Buildings and Rooms. The Buildings and Rooms window will open.
2. In the Select Building field, select the building that contains the room you want to edit. All the rooms currently in the selected building will now be listed.
3. Click the room number you want to edit and click the Edit Room button. The Enter Room Information window will open (Figure 17-20).
4. Change the appropriate information and click the OK button to close the Enter Room Information window.
5. Click the OK button to close the Buildings and Rooms window.



Enter Room Information

Room Information

Room No.: 0130A Sort: 1

Room Type: Double Overflow: 0

Room Style: Suite: 0130 Floor: 1

Area: Wing: Gender:

Telephone: 7016

Additional Information

Key Code: 1234-2345 PO Box:

User 1: User 2:

OK Cancel

Figure 17-20

Delete a Residence Room

1. In the browse tree, expand Setup and click Buildings and Rooms. The Buildings and Rooms window will open.
2. In the Select Building field, select the building that contains the room you want to delete. All the rooms currently in the selected building will now be listed.
3. Click the room number you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the room.

Section 17: Miscellaneous Functions

You will not be able to delete a room if it is being used in a room blocking or assignment; you will see a warning (Figure 17-21). When you click the OK button in the warning window, a Participants window opens (Figure 17-22) listing all the blockings and room assignments for that room. Write down the participants' and conferences' names so you can delete the room assignments and blockings, then try again to delete the room.

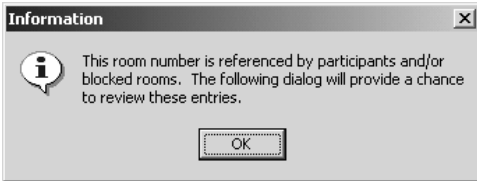
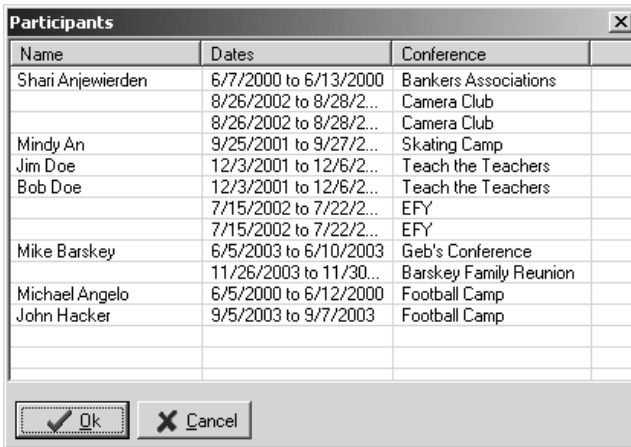


Figure 17-21



A 'Participants' dialog box with a title bar and a close button. It contains a table with columns 'Name', 'Dates', and 'Conference'. Below the table are 'OK' and 'Cancel' buttons.

Name	Dates	Conference
Shari Anjewierden	6/7/2000 to 6/13/2000	Bankers Associations
	8/26/2002 to 8/28/2...	Camera Club
	8/26/2002 to 8/28/2...	Camera Club
Mindy An	9/25/2001 to 9/27/2...	Skating Camp
Jim Doe	12/3/2001 to 12/6/2...	Teach the Teachers
Bob Doe	12/3/2001 to 12/6/2...	Teach the Teachers
	7/15/2002 to 7/22/2...	EFY
	7/15/2002 to 7/22/2...	EFY
Mike Barskey	6/5/2003 to 6/10/2003	Geb's Conference
	11/26/2003 to 11/30...	Barskey Family Reunion
Michael Angelo	6/5/2000 to 6/12/2000	Football Camp
John Hacker	9/5/2003 to 9/7/2003	Football Camp

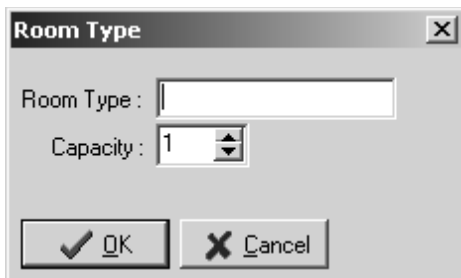
Figure 17-22

4. Click the OK button to close the Buildings and Rooms window.

17.6 Room Types

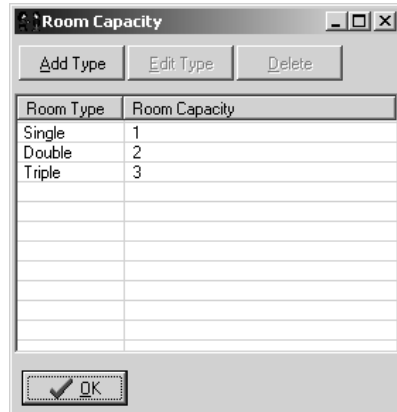
Add Room Types

1. In the browse tree, expand Setup and click Room Types. The Room Capacity window will open (Figure 17-23).
2. Click the Add Type button. The Room Type window will open (Figure 17-24).



A 'Room Type' dialog box with a title bar and a close button. It has a 'Room Type' text field and a 'Capacity' spinner set to '1'. At the bottom are 'OK' and 'Cancel' buttons.

Figure 17-24



A 'Room Capacity' dialog box with a title bar and window controls. It has 'Add Type', 'Edit Type', and 'Delete' buttons. Below is a table with columns 'Room Type' and 'Room Capacity'. At the bottom is an 'OK' button.

Room Type	Room Capacity
Single	1
Double	2
Triple	3

Figure 17-23

3. In the Room Type field, type a name for the type of room you are adding. Set the Capacity field to the maximum number of occupants this room type can handle.

Section 17: Miscellaneous Functions

The order you create room types is the order they will appear in lists.

4. Click the OK button to close the Room Capacity window.

Edit Room Types

1. In the browse tree, expand Setup and click Room Types. The Room Capacity window will open.
2. Click the room type you want to edit and click the Edit Type button. The Room Type window will open.
3. Change the appropriate information and click the OK button.
4. Click the OK button to close the Room Capacity window.

Delete Room Types

1. In the browse tree, expand Setup and click Room Types. The Room Capacity window will open.
2. Click the room type you want to delete and click the Delete button.
3. Click the OK button to close the Room Capacity window.

17.7 Accounts and Account Groups

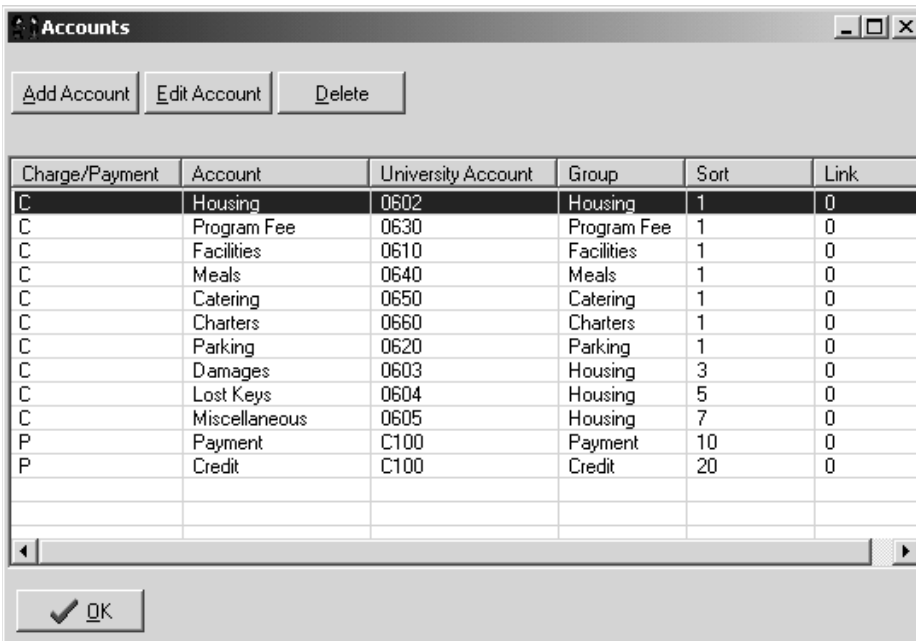
Adding an Account

Before you can add an account, you must have at least one account group.

1. In the browse tree, expand Setup and click Accounts. The Accounts window will open (Figure 17-25).
2. Click the Add Account button. The Account Edit window will open (Figure 17-26).
3. In the Account Type field, select whether the account is for Charges or Payments. In the Account Name field, type the name for this account. In the Account Group field, select which account group this account belongs to. The account groups are used in reports to subtotal charges and payments. In the Account Code field, type a university account number you want to link this account to - the account code is displayed on several financial

Section 17: Miscellaneous Functions

reports, but is not a required field. Set the sort field to list the event in the order you want (see Section 1.11: Sort Fields).



The screenshot shows a window titled "Accounts" with three buttons at the top: "Add Account", "Edit Account", and "Delete". Below the buttons is a table with the following columns: Charge/Payment, Account, University Account, Group, Sort, and Link. The table contains the following data:

Charge/Payment	Account	University Account	Group	Sort	Link
C	Housing	0602	Housing	1	0
C	Program Fee	0630	Program Fee	1	0
C	Facilities	0610	Facilities	1	0
C	Meals	0640	Meals	1	0
C	Catering	0650	Catering	1	0
C	Charters	0660	Charters	1	0
C	Parking	0620	Parking	1	0
C	Damages	0603	Housing	3	0
C	Lost Keys	0604	Housing	5	0
C	Miscellaneous	0605	Housing	7	0
P	Payment	C100	Payment	10	0
P	Credit	C100	Credit	20	0

At the bottom of the window is an "OK" button with a checkmark icon.

Figure 17-25



The screenshot shows a window titled "Account Edit" with a close button (X) in the top right corner. The window is divided into two sections: "Account Information" and "Account Groups".

Account Information:

- Account Type: Charge (dropdown menu)
- Account Name: [text input field]
- Account Group: [dropdown menu]
- Account Code: [text input field]
- Sort: 0 (spin box)
- Link: 0 (spin box)

Account Groups:

- Groups button
- Add, Edit, Delete Account Groups text

At the bottom are "OK" and "Cancel" buttons.

Figure 17-26

Edit an Account

1. In the browse tree, expand Setup and click Accounts. The Accounts window will open.

4. Click the OK button to close the Account Edit window.
5. Click the OK button to close the Accounts window.

Figure 17-27 shows that the Housing, Damages, Lost Keys, and Miscellaneous accounts are all in the Housing account group. On financial reports we generally use the sort field to order the list of charges. The sort field also affects the order that the charges appear in the list of charges you can choose from when you create a manual charge for a conference, subgroup, or participant.

Section 17: Miscellaneous Functions

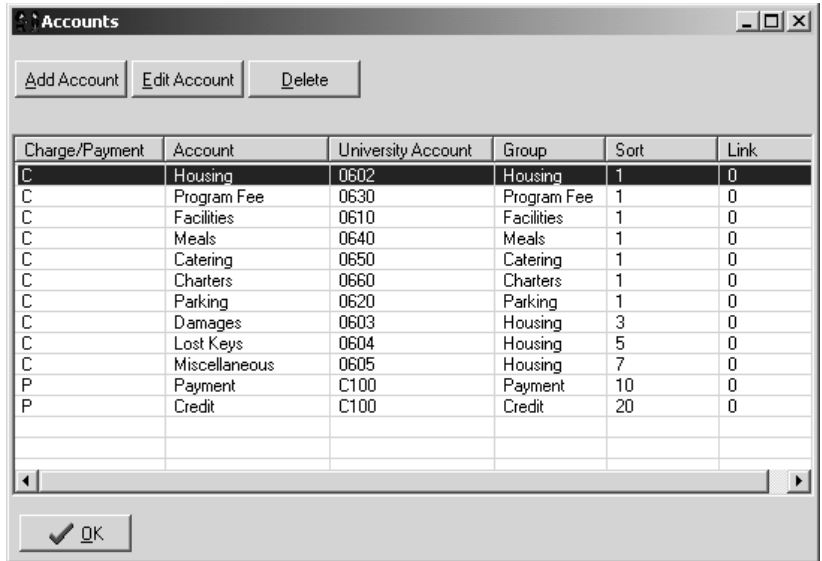


Figure 17-27

2. Click the name of the account you want to change and click the Edit Account button. The Account Edit window will open (Figure 17-26).
3. Change the appropriate information and click the OK button.
4. Click the OK button to close the Accounts window.

Delete an Account

1. In the browse tree, expand Setup and click Accounts. The Accounts window will open.
2. Click the name of the account you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the account.

You will not be able to delete an account if it is used in any existing charge; you will see a warning (Figure 17-28).

3. Click the OK button to close the Accounts window.

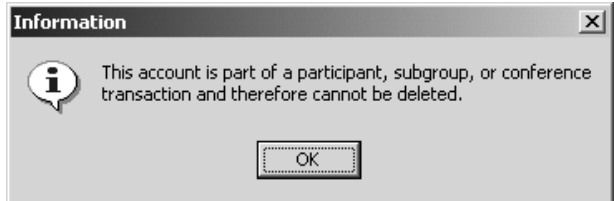


Figure 17-28

Section 17: Miscellaneous Functions

Add an Account Group

1. In the browse tree, expand Setup and click Accounts. The Accounts window will open.
2. Click the Add Account button. The Account Edit window will open.



Figure 17-29

3. Click the Groups button. The Account Groups window will open (Figure 17-29).
4. Click the Add Group button. The Group Name window will open (Figure 17-30).

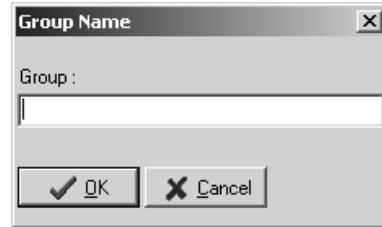


Figure 17-30

5. In the group field, type the name of the new account group and click the OK button.
6. Click the OK button to close the Account Groups window, then click the Cancel button to close the Account Edit window without adding a new account.

Edit an Account Group

1. In the browse tree, expand Setup and click Accounts. The Accounts window will open.
2. Click the Add Account button. The Account Edit window will open.
3. Click the Groups button. The Account Groups window will open (Figure 17-29).
4. Click the account group name you want to change and click the Edit Group button (or double-click a group name). The Group Name window will open (Figure 17-30).
5. Change the appropriate information and click the OK button.

Section 17: Miscellaneous Functions

- Click the OK button to close the Account Groups window, then click the Cancel button to close the Account Edit window without adding a new account.

Delete an Account Group

- In the browse tree, expand Setup and click Accounts. The Accounts window will open.
- Click the Add Account button. The Account Edit window will open.
- Click the Groups button. The Account Groups window will open (Figure 17-29).
- Click the account group name you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the account group.

You will not be able to delete an account group if there are accounts assigned to it; you will see a warning (Figure 17-31). You will have to delete the accounts, or assign them to other groups, before you can delete this account group.




Figure 17-31

- Click the OK button to close the Account Groups window, then click the Cancel button to close the Account Edit window without adding a new account.

17.8 Tax Rules

Add a Tax Rule

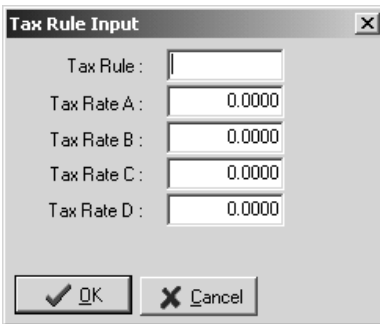
- In the browse tree, expand Setup and click Tax Rules. The Tax Rules window will open (Figure 17-32).
- Click the Add Tax Rule button. The Tax Rule Input window will open (Figure 17-33).
- In the Tax Rule field, type the name of the tax rule - for example, "State Housing Tax"



Tax Rule	Tax A	Tax B	Tax C	Tax D
No Tax	0.0000	0.0000	0.0000	0.0000
Tax Meals	0.0585	0.0000	0.0000	0.0000

Figure 17-32

Section 17: Miscellaneous Functions



The screenshot shows a dialog box titled "Tax Rule Input". It has a close button (X) in the top right corner. The dialog contains five input fields: "Tax Rule" (empty), "Tax Rate A" (0.0000), "Tax Rate B" (0.0000), "Tax Rate C" (0.0000), and "Tax Rate D" (0.0000). At the bottom, there are two buttons: "OK" with a checkmark icon and "Cancel" with an X icon.

Figure 17-33

4. In the Tax Rate A field, type the rate of the tax. Enter the rate as a decimal percentage (7.5% would be entered as "0.0750").

If the tax rule has multiple tax rates, enter them in the Tax Rate B, Tax Rate C, and Tax Rate D fields. For example, a tax rule might apply a state tax and a federal tax - Tax Rate A might be set to .0600 for 6% state tax, and Tax Rate B might be set to .0450 for 4.5% federal tax. However, if the tax rule has only one tax rate but you have other tax rules, leave the Tax

Rate B, Tax Rate C, and Tax Rate D fields set to 0 (zero) and create separate tax rules for each. For example, one tax rule might be called "housing tax" and the Tax Rate A field might be set to 5% (0.0500) and Tax Rate B might be set to 0, while another tax rule might be called "food tax" and the Tax Rate A field might be set to 0 and Tax Rate B might be set to 4% (0.0400).

5. Click the OK button.
6. Click the OK button to close the Tax Rules window.

Edit a Tax Rule

1. In the browse tree, expand Setup and click Tax Rules. The Tax Rules window will open.
2. Click the Edit button. The Tax Rule Input window will open (Figure 17-33).
3. Change the appropriate information and click the OK button.
4. Click the OK button to close the Tax Rules window.

Delete a Tax Rule

1. In the browse tree, expand Setup and click Tax Rules. The Tax Rules window will open.
2. Click the tax rule you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the tax rule.

Section 17: Miscellaneous Functions

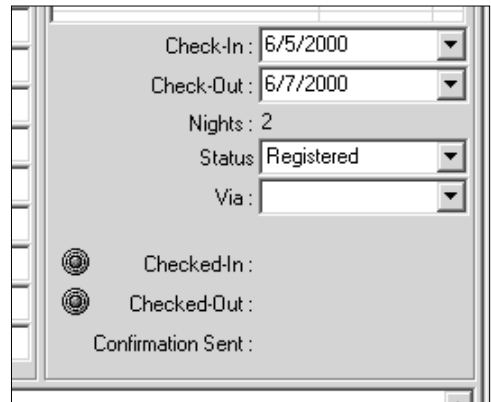
You will not be able to delete a tax rule if it is used in any charge; you will see a warning. You will have to delete all the charges using this tax rule, or assign a different tax rule to those charges, before you can delete this tax rule.

3. Click the OK button to close the Tax Rules window.

17.9 Checking Participants In and Out

In the bottom right corner of the Participants General tab are the Checked-In and Checked-Out buttons (Figure 17-34). In this example, the participant has neither been Checked-In or Checked-Out.

When this participant actually checks in at the front desk and receives the key to their room, click the Checked-In button to tell Conference Programmer that this participant is here; and that the room they are assigned to is now occupied and, as regards housekeeping, is now “dirty.” After you check a participant in, you must click the Post button on the toolbar.



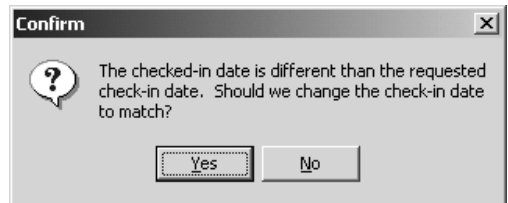
The screenshot shows a window titled 'Participants General' with the following fields and controls:

- Check-In: 6/5/2000 (dropdown menu)
- Check-Out: 6/7/2000 (dropdown menu)
- Nights: 2
- Status: Registered (dropdown menu)
- Via: (dropdown menu)
- Checked-In: (radio button)
- Checked-Out: (radio button)
- Confirmation Sent: (text field)

Figure 17-34

Use the same process to check a participant out. When you click the Checked-Out button, Conference Programmer marks the room the participant was in as unoccupied, but still “dirty.” After you check a participant out, you must click the Post button on the toolbar.

If you click the Checked-In (or Checked-Out) button on a date different than the participant’s Check-In (or Check-Out) date, you will receive a warning (Figure 17-35). Click the Yes button to change the participant’s Check-In field to match the actual date that they are checking in, or click the No button to leave their Check-In field set as it is, yet still mark this participant as checked-in (or checked-out) on the current date and time. Remember that charges for the participant’s stay are based on the dates in the Check-In and Check-Out fields, not the dates they actually checked in or checked out, as displayed next to the Checked-In and Checked-Out buttons.



The screenshot shows a 'Confirm' dialog box with the following text and buttons:

Confirm [X]

? The checked-in date is different than the requested check-in date. Should we change the check-in date to match?

Yes No

Figure 17-35

Section 17: Miscellaneous Functions

To clear the Checked-In or Checked-Out date and time, click the Checked-In or Checked-Out button, then click the Post button on the toolbar.

Use the Group Check-In/Check-Out wizard to check-in or check-out multiple participants simultaneously, or to check-in or check-out an individual on a date and time other than the current date and time. (see Section 17.10: Group Check-In/Out Wizard).

Use the Checked-In and Checked-Out checkboxes in conjunction with the Mark Rooms Cleaned wizard to manage housekeeping (see Section 17.11: Mark Rooms Cleaned Wizard).

It may be convenient to have the participant's status changed for you as you check them in or out. Conference Programmer can do this for you, and it can warn you if the room a participant is being checked into is already occupied or is not clean.

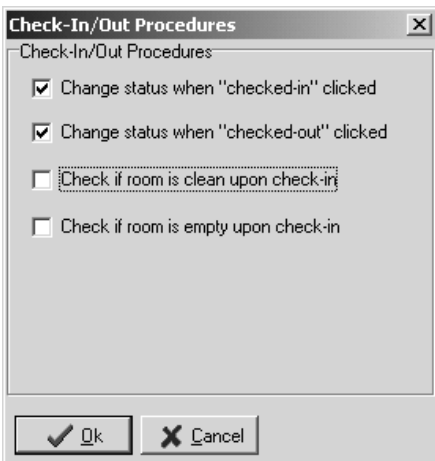


Figure 17-36

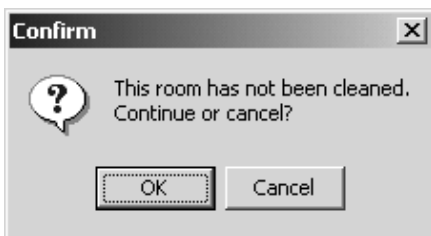


Figure 17-37

1. In the browse tree, expand Setup and click Check-in/out procedures. The Check-In/Out Procedures window will open (Figure 17-36).

If the "Change status when 'checked-in' clicked" checkbox is checked, a participant's status will be changed to "Checked In" when you check them in.

If the "Change status when 'checked-out' clicked" checkbox is checked, a participant's status will be changed to "Checked Out" when you check them out.

If the "Check if room is clean upon check-in" checkbox is checked, you will see a warning if you try to check a participant into a room that has not been marked clean (Figure 17-37) (see Section 17.11: Mark Rooms Cleaned Wizard).

If the "Check if room is empty upon check-in" checkbox is checked, you will see a warning if you try to check a participant into a room in which another participant has already been checked in (Figure 17-38).

Section 17: Miscellaneous Functions

Checking more than one of the checkboxes can result in many warnings when you check a participant in or out. As a complex example, if all 4 checkboxes are checked, you could receive a warning that the room you are trying to check a participant into is already occupied and therefore is considered dirty (Figure 17-39), and then you might see another warning that the date you are checking the participant in is different than the date they were supposed to check in (Figure 17-35).

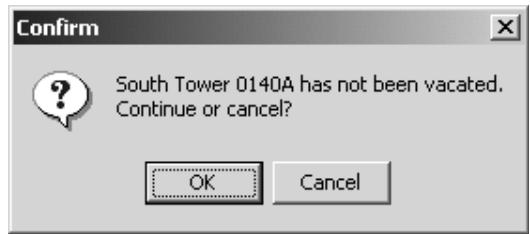


Figure 17-38

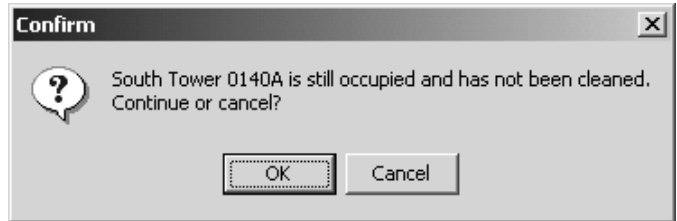


Figure 17-39

2. Click the OK button to save your changes to the Check-In/Out Procedures.

17.10 Group Check-In/Out Wizard

In the bottom right corner of the Participants General tab, the Status field can be set to show the status of an individual participant (Figure 17-40). In this example, the Status field is set to "Registered." Your Service Template is probably set to automatically assign a value of "Registered" to the Status field when you add a new participant, but you can set the Status field to "Canceled" if a participant cancels before the conference starts; participants with a status of "Canceled" can be ignored in rosters and other reports, and your Transaction Template can be set to not charge participants with a status of "Canceled." You could also have a "No-Show" status, and your Transaction Template can be set to charge a one-time fee for "No-Shows" instead of a nightly fee for regular participants.

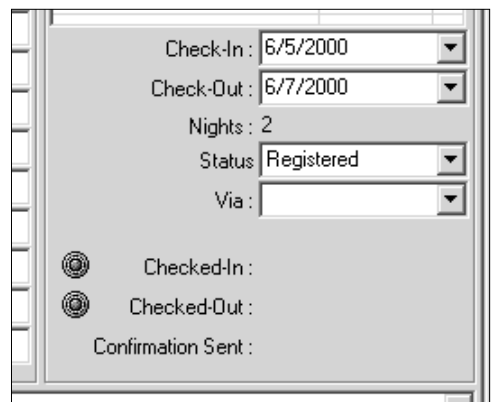


Figure 17-40

Section 17: Miscellaneous Functions

The Group Check-In/Out wizard can quickly and easily change each applicable participant from one status to another status. For example, if you have 50 participants set to a status of “Early Arrival” and they change their schedule, you can use this wizard to change all 50 participants’ Status fields to “Late Arrival.” As another example, you might have 200 participants that checked in yesterday at 10:00am, but the front desk only had a print out of the rooming roster to check off the names of the participants as they were given their keys; you can use the Group Check-In/Out wizard today to automatically check in all 200 participants with a Checked-In value of yesterday at 10:00am.

Make sure you are working with the conference that contains the participants whose status you want to change.

1. In the browse tree, expand Wizards and click Group Check-In/Out. The Group Check-In/Check-Out window will open (Figure 17-41).

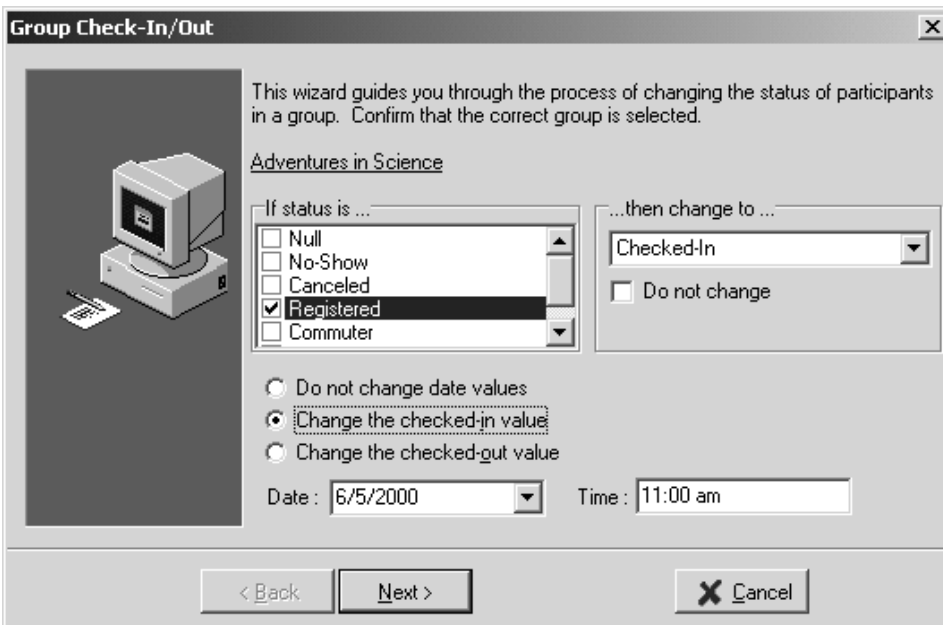


Figure 17-41

2. In the If Status Is field, check the checkbox next to each participant status that you want to change to another status. In this example, we checked the “Registered” checkbox; we want all participants in the Adventures In Science conference who have a participant status of “Registered” to have their status changed.

Section 17: Miscellaneous Functions

In the Then Change To field, uncheck the “Do not change” checkbox and select the participant status that you want to change to. In this example, we selected the “Checked In” status; we want the wizard to find all participants whose status field is set to “Registered” and change their status to “Checked In.” You can also leave the “Do not change” checkbox checked to leave the status of the participants alone when checking them in or out.

The “Do not change date values” option is automatically selected when you run the Group Check-In/Out wizard. If you want to change the Checked-In or Checked-Out date or time, select the appropriate option and enter the appropriate date and time in the Date and Time fields (see Section 17.9: Checking Participants In and Out).

3. Click the Next button. The “No date rule” option is automatically selected (Figure 17-42); this means that no date filtering will be done. In this example, all participants with a Status of “Registered” will be changed to a status of “Checked In” and their Checked-In value will be set to “6/5/2000 11:00am.”

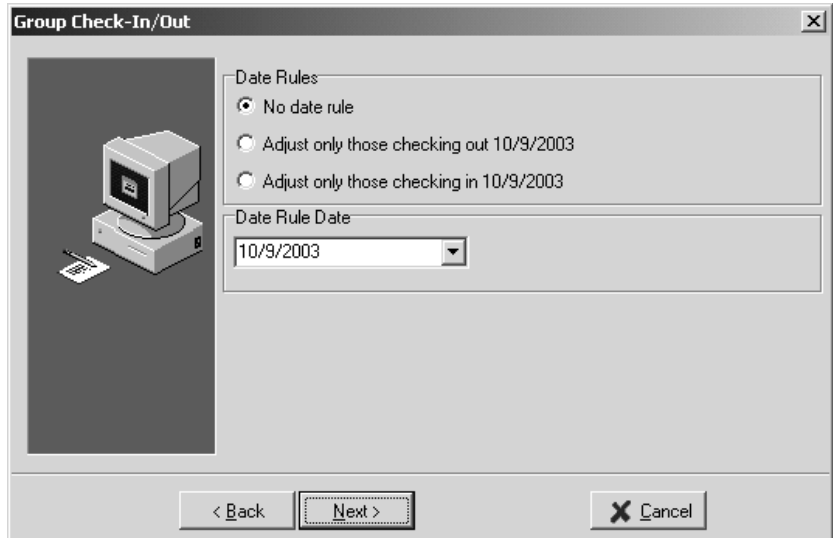


Figure 17-42

You can choose to only change the Status and Checked-In value for those participants whose Check-In or Check-Out field is a certain date. For example, you might want only those participants with a Status of “Registered” who are supposed to check in on 6/5/2000 to be changed (not those participants who are supposed to check in a day early on 6/4/2000). Select the appropriate option in the Date Rules area, and select the date you want to deal with in the Date Rule Date area.

Section 17: Miscellaneous Functions

- Click the Next button. The wizard displays a list of all participants whose status matches what you selected (Figure 17-43). In this example, it lists all participants with a status of "Registered." When you click the Next button, the wizard will change the status of all participants in this list with a check in the checkbox next to their name to the new status; you can uncheck the checkbox next to any participants whose status you do not want to change. In this example, we have decided not to change the status for Michelle Brown or Susan Cameron.

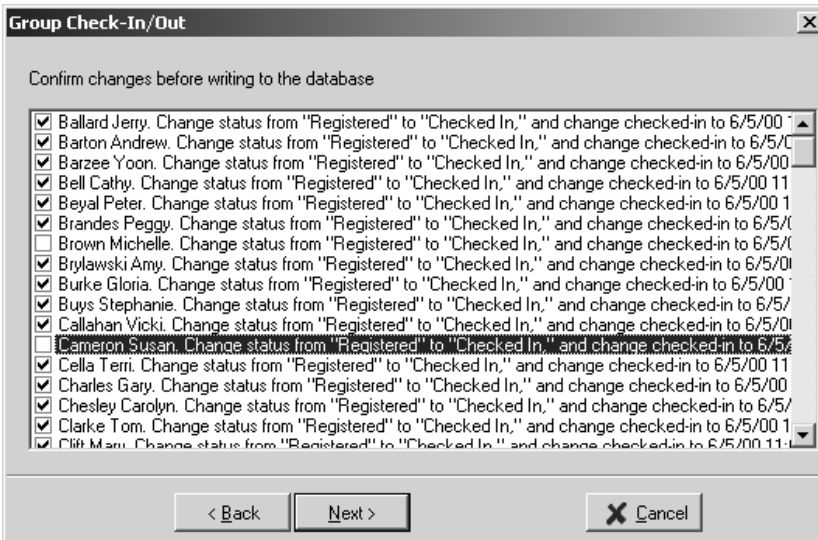


Figure 17-43

- Click the Next button. The wizard will display its progress. Click the OK button when the wizard informs you that it has finished.

17.11 Mark Rooms Cleaned Wizard

If you use the Checked-In and Checked-Out functionality of Conference Programmer (see Section 17.9: Checking Participants In and Out), you are also automatically tracking whether rooms are occupied or unoccupied, and whether they are "clean" or "dirty." When you check a participant into a room, Conference Programmer marks that room as occupied and dirty. When the participant checks out of the room, Conference Programmer marks that room as unoccupied, but still dirty.

Your housekeeping staff can have access to reports in Conference Programmer to show them all the rooms that a conference is using, or all

Section 17: Miscellaneous Functions

the rooms with participants in them, or all the rooms marked dirty. Once the rooms have been cleaned, use the Mark Rooms Cleaned wizard to tell Conference Programmer that the rooms are clean and available for another participant.

The Find/Assign Vacant Room wizard also uses the clean/dirty room functionality (see Section 9.3: Find/Assign Vacant Room).

1. In the browse tree, expand Wizards and click Mark Rooms Cleaned. The Mark Rooms Cleaned window will open (Figure 17-44).

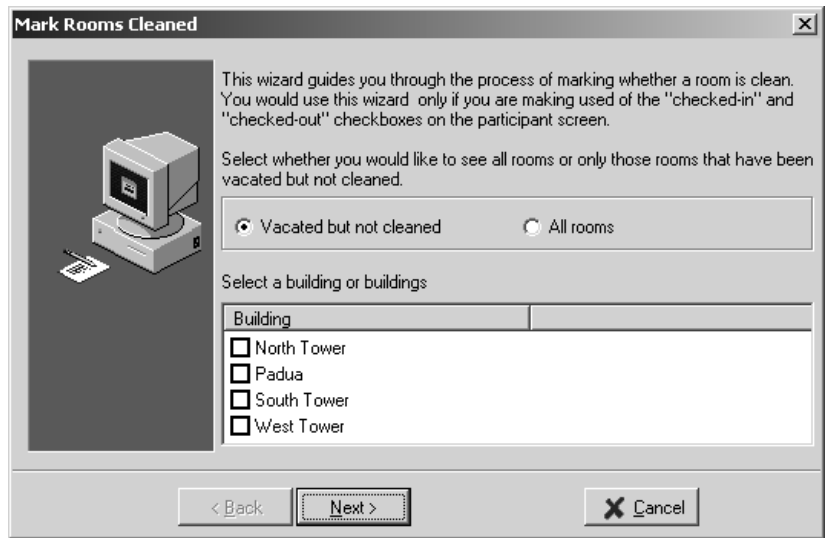


Figure 17-44

2. Select whether you want the wizard to list all unoccupied rooms that are still dirty ("Vacated but not cleaned") or to list "All rooms."
3. Check the checkbox next to each building you want the wizard to list rooms in. Click the Next button. The wizard lists all rooms that match your criteria (Figure 17-45).
4. Check the checkbox next to each room that has been cleaned. You can check all or none of the checkboxes by click the Select All or Clear All buttons, respectively. When you click the Next button, the wizard will mark the rooms as clean. The next time you run the wizard, if you select to show "All rooms," the Cleaned column will show the date and time the rooms were marked as clean.

Section 17: Miscellaneous Functions

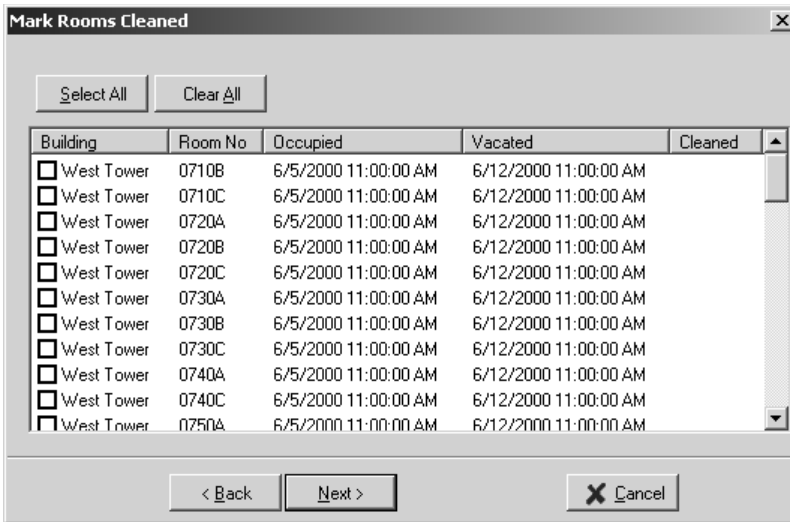


Figure 17-45

17.12 Computation Of Costs Wizard

The Computation of Costs wizard allows you to quickly formulate quotes for complex situations. For example, if you need to tell a customer a quote for some double rooms, some single rooms, some catered events, and some equipment rentals, you can use this wizard to quickly come up with a total charge, without having to complete all the necessary data entry and wizard processing.

1. In the browse tree, click Conferences and click the General tab. Click the Add button on the toolbar to create a new conference. Enter a name for this conference in the Conference field, such as "Temporary Quote for Customer X," and enter check-in and check-out dates in the Check-In and Check-Out fields (it is irrelevant which dates you select).

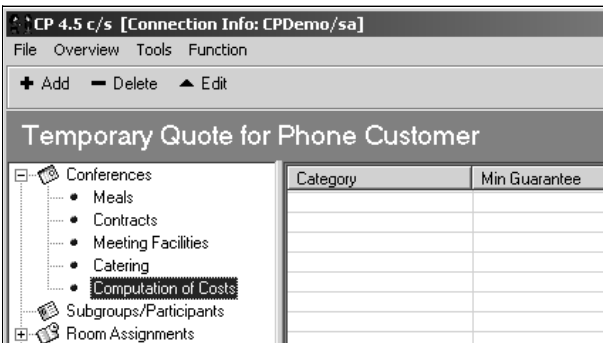


Figure 17-46

2. In the browse tree again, expand Conferences and click Computation of Costs. The Computation of Costs items, if any, will display in the main portion of the window (Figure 17-46).

Section 17: Miscellaneous Functions

3. Click the Add button on the toolbar. The Computation of Costs window will open (Figure 17-47).
4. In the Category field, select a category for the first type of charge you want in your quote. In this example, we want to quote double rooms so we select "Lodging."

Set the Min. Guar field, to the number of participants you want to quote this charge for. In this example, we want to quote a nightly double room rate for 200 participants, so we set the Min. Guar field to 200. The Actual field reflects the actual number of participants the charge gets applied to; you can ignore this field because actual numbers versus guaranteed numbers only affect charges when you are entering a real conference, not when you are entering a quote.

In the Item field, select the type of item you want to quote the charge for. In this example, we select "Doubles."

Set the No of Units field to the number of items per participant you want to quote the charge for. In this example, we want to quote the charge for 200 double rooms for 2 nights each, so we set the No of Units field to "2."

In the Unit Amt field, type the amount per unit you want to use as a base to calculate the charge. In this example, we want to charge \$20.00 per night per participant for a double room, so we type "20.00" in the Unit Amt field.

In the Units field, select the type of unit that you are using to calculate the charge. In this example, we want to calculate a nightly charge per participant, so we selected "Nights."

The Amount field automatically fills in the correctly calculated amount once the other necessary fields have been set.

Choose a tax rule from the Tax field - this field is required even if you do not charge tax. Select an account to track this charge from the Account field - this account is required, even though for a quote you probably do not care which account the quoted charge gets tracked to.

In the Description field, you can enter a brief note (up to 40 characters maximum) to explain what this charge is calculating.

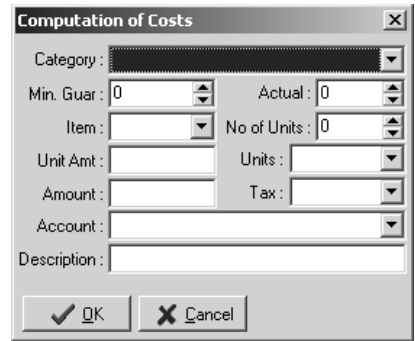


Figure 17-47

Section 17: Miscellaneous Functions

Computation of Costs

Category: Lodging

Min. Guar: 200 Actual: 0

Item: Doubles No of Units: 2

Unit Amt: \$20.00 Units: Night(s)

Amount: \$8,000.00 Tax: No Tax

Account: Housing

Description:

OK Cancel

Figure 17-48

Figure 17-48 shows the completed Computation of Costs dialog box for our example.

- Click the OK button. Your calculated charge is displayed in the main portion of the window (Figure 17-49).

You can repeat this process to enter more charge calculations. For example, you could also enter a calculation for 20 Single rooms for 3 nights each at \$30.00 per night per participant (Figure 17-50).

CP 4.5 c/s [Connection Info: LocalCP/sa]

File Overview Tools Function

+ Add - Delete ^ Edit

Temporary Quote for Phone Customer

Category	Min Guarantee	Actual	Item	Unit Amount	No. of Units	Units	Amount	Description	Account	Tax Rate
Lodging	200	0	Doubles	\$20.00	2	Night(s)	\$8,000.00	Housing	No Tax	

Figure 17-49

Because the Computation of Costs feature is so versatile, you can enter exact charges, like in the previous example, or rough estimates. For example, if your customer on the phone wants to know the rough price for two catered dinners, but does not know the menu they want or other details, you can enter a calculation with estimated numbers (Figure 17-51).

Computation of Costs

Category: Lodging

Min. Guar: 20 Actual: 0

Item: Singles No of Units: 3

Unit Amt: \$30.00 Units: Night(s)

Amount: \$1,800.00 Tax: No Tax

Account: Housing

Description:

OK Cancel

Figure 17-50

Figure 17-52 shows all three calculations in this example.

Computation of Costs

Category: Meals

Min. Guar: 1 Actual: 0

Item: Catered Dinner No of Units: 2

Unit Amt: \$2,500.00 Units: N/A

Amount: \$2,500.00 Tax: No Tax

Account: Catering

Description: Estimate

OK Cancel

Figure 17-51

Section 17: Miscellaneous Functions

Category	Min Guarantee	Actual	Item	Unit Amount	No. of Units	Units	Amount	Description	Account	Tax Rule
Lodging	200		Doubles	\$20.00	2	Night(s)	\$8,000.00		Housing	No Tax
Lodging	20		Singles	\$30.00	3	Night(s)	\$1,905.30		Housing	Tax Meals
Meals	1		Catered Dinner	\$2,500.00	2	N/A	\$5,000.00	Estimate	Catering	No Tax

Figure 17-52

The total of all your calculations is displayed in the status bar at the bottom of the window. For an itemized list of the calculations that you can file or fax to your customer, print the “Computation of Costs” report in report folder “(11) Group Billing Worksheets” (report folder #11) (see Section 16.1: Viewing Reports). Figure 17-53 shows the “Computation of Costs” report for our three examples.

#	Item	Rate	# Units	Units	Extension	Tax	Total
Lodging							
200	Doubles	\$20.00	2	Night(s)	\$8,000.00	\$0.00	\$8,000.00
20	Singles	\$30.00	3	Night(s)	\$1,800.00	\$105.30	\$1,905.30
						Lodging Sub-total	\$9,905.30
Meals							
1	Catered Dinner - Estimate	\$2,500.00	2	N/A	\$5,000.00	\$0.00	\$5,000.00
						Meals Sub-total	\$5,000.00
Totals							\$14,905.30

Figure 17-53

17.13 Contact List

The contact information you enter in the Contact List can be used in a couple ways in Conference Programmer. A contact’s information can be copied to your conference as the conference contact (see Section 17.3: Copying Elements Between Conferences). The contacts in the Contact List are also the names you select from when choosing your various contacts in the Catering wizard (see Sections 14.3: Catering Meetings or 14.4: Catering Events).

Section 17: Miscellaneous Functions

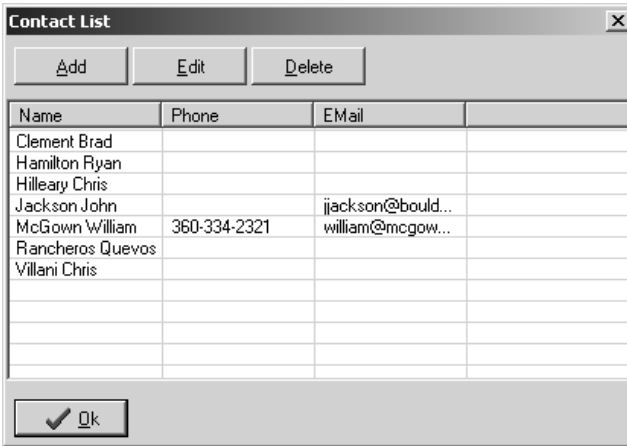


Figure 17-54

Add a Contact

1. In the browse tree, expand Wizards and click Edit Contact List. The Contact List window will open (Figure 17-54).
2. Click the Add button. Another Contact List window will open (Figure 17-55).
3. Type the information for your contact in the appropriate fields.



Figure 17-55

4. To add notes about this contact, click the Notes tab and type your notes in the field.
5. Click the OK button to close this Contact List window.
6. Click the OK button to close the first Contact List window.

Edit a Contact

1. In the browse tree, expand Wizards and click Edit Contact List. The Contact List window will open.
2. Click the name of the contact you want to edit and click the Edit button. Another Contact List window will open.
3. Change the appropriate information and click the OK button
4. Click the OK button to close the first Contact List window.

Delete a Contact

1. In the browse tree, expand Wizards and click Edit Contact List. The Contact List window will open.

Section 17: Miscellaneous Functions

2. Click the name of the contact you want to delete and click the Delete button. Click the OK button when asked to confirm that you want to delete the contact.
3. Click the OK button to close the Contact List window.

Copying Contacts To and From the Contact List

If you have already created a participant, subgroup contact, or conference contact in Conference programmer, you can copy their information to the Contact List. You might want to do this if, for example, a subgroup or conference contact will be the contact for multiple subgroups or conferences; you can copy their information to the Contact List and then use them many times without having to re-type their information. You can also copy a contact's information from the Contact List to any participant, subgroup, or conference General tab.

To copy a participant, subgroup contact, or conference contact to the Contact List, make sure you are viewing that person's General tab.

1. Click the Procedures button on the toolbar, and select Copy to Contacts List.

If a contact with the same name already exists in the Contact List, you will see a warning (Figure 17-56).

Click the Yes button to add the contact to the Contact List, or click the No button not to add the contact.

2. Click the OK button when the Information window opens telling you the contact was successfully added (Figure 17-57).

To copy a contact from the Contact List to a participant, subgroup, or conference General tab, make sure you are viewing the General tab of the participant, subgroup contact, or conference contact you want to copy the contact information to.

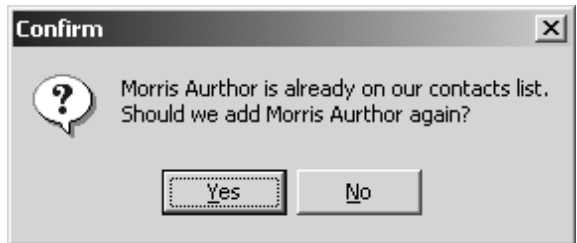


Figure 17-56



Figure 17-57

Section 17: Miscellaneous Functions



Figure 17-58

1. Click the Procedures button on the toolbar, and select Copy from Contacts List. The Select Contact window will open (Figure 17-58).
2. Select the contact whose information you want to copy. Or, in the Search Characters field at the top of the window, you can start typing the last name of the contact whose information you want to copy - the list will scroll to the name you are typing.

Click the OK button.

The contact information from the Contact List replaces whatever contact information was previously on the General tab, including the first and last name.

3. Click the Post button on the toolbar to save the changes you have made.

17.14 Email

You can send email to any participant, subgroup contact, or conference contact in Conference Programmer, individually or to many at once. You can also set up template emails, so that each recipient gets the same basic email customized with their own pertinent information. Conference Programmer can also receive emails, which is only useful when processing web registrations.

Configuring Email Settings

You must configure Conference Programmer with your email settings only once (you may need the assistance of your IT department). The settings are dependent for each user on each computer on which Conference Programmer is installed (the settings are stored in the HKEY_CURRENT_USER registry key); this is so each Conference Programmer user can have different email settings.

1. Double-click the email field on the General tab of any participant, subgroup contact, or conference contact (Figure 17-59). It does not matter if the email field has an email address entered or is blank. The Send Email window will open (Figure 17-60).

Section 17: Miscellaneous Functions

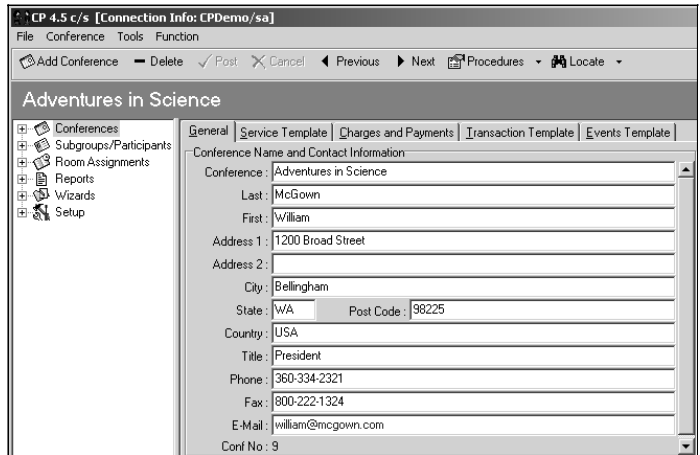


Figure 17-59

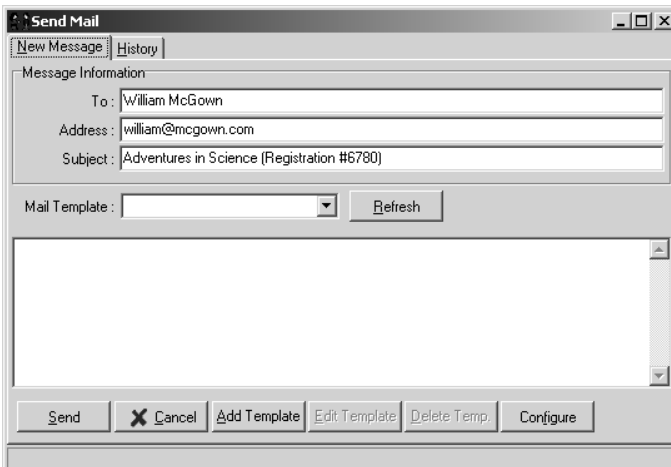


Figure 17-60

2. Click the Configure button in the lower right corner of the window. The Email Configuration window will open (Figure 17-61).
3. The POP3 settings are used by Conference Programmer to check incoming mail. You only need to configure these if you will be processing web registrations from this computer. In the POP3 Server field, enter your POP3 email server. Enter your email address in the



Figure 17-61

Section 17: Miscellaneous Functions

POP User Name field; your entire email address is usually used as your user name to log into the email server, but sometimes only the first part of your email address (before the @ symbol) is used - check with your IT department if you need assistance. In the Password and Confirm fields, enter your password (you must enter it twice to assure accuracy).

4. Click the SMTP tab (Figure 17-62). The SMTP settings are used by Conference Programmer to sent outgoing mail. You need to configure these if you want to send any email from Conference Programmer. In the SMTP field, enter your SMTP server. In the From field, enter your name as you want it to appear to the recipient of the email. In the From Address field enter your email

address; it is to this address that emails from the recipient will come if they reply to your email. If you want a copy of your outgoing emails sent to someone (for example: yourself, or your office manager), enter their name in the CC field and their email address in the CC Address field - leave these 2 fields blank if you do not want to send copies of your outgoing emails to anyone. If your SMTP server requires authentication (check with your IT department if you need assistance with this), check the “My SMTP Server Requires Authentication” checkbox, then click the Settings button. The SMTP Login Information window will open (Figure 17-63). Enter your SMTP user name in the User Name field. In the Password and Confirm fields, enter your SMTP password (you must enter it twice to assure accuracy). Click the OK button to close the SMTP Login Information window.

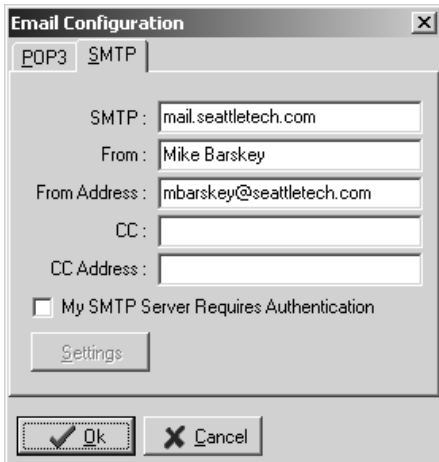


Figure 17-62

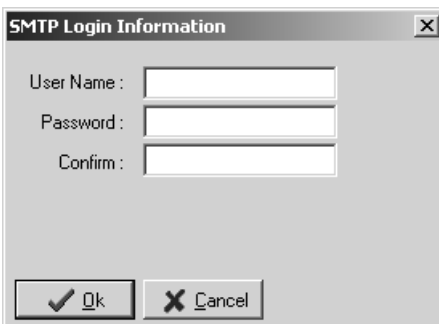


Figure 17-63

5. Click the OK button to close the Email Configuration dialog box.
6. Click the Cancel button to close the Send Email dialog box.

Section 17: Miscellaneous Functions

Sending an Individual Email

You can send an individual email to any participant, subgroup contact, or conference contact in Conference Programmer.

1. View the General tab of the participant, subgroup contact, or conference contact you want to send email to and double-click on the Email field (Although the Send Email window will open if the Email field is blank, email will not be sent unless an email address has been entered). The Send Email window will open (Figure 17-60).
2. The Recipient's name and email address are automatically entered in the To and Address fields. The email's subject is also automatically entered as the conference name and the participant, subgroup, or conference number - you can change the subject to anything you want.
3. In the large field in the bottom half of the window, type your email.
4. When your email is complete, click the Send button.

Creating an Email Template

You will find many situations where you want to send the same email to many recipients. Conference Programmer can send multiple emails simultaneously, and can automatically customize each email with information specific to its recipient. An email message that has been set up to contain general information as well as information specific to its recipient is called an Email Template.

1. View the General tab of any participant, subgroup contact, or conference contact and double-click on the Email field. The Send Email window will open (Figure 17-60).

Note: If you double-click on the Email field for a participant, you will create an Email template that can only be sent to participants (not subgroup or conference contacts). Likewise, if you double click on the Email field for a subgroup or conference contact, the Email Template you create will only be available when sending emails to subgroup or conference contacts, respectively.

2. Click the Add Template button on the bottom of the window. The Email Template window will open (Figure 17-64).

Section 17: Miscellaneous Functions

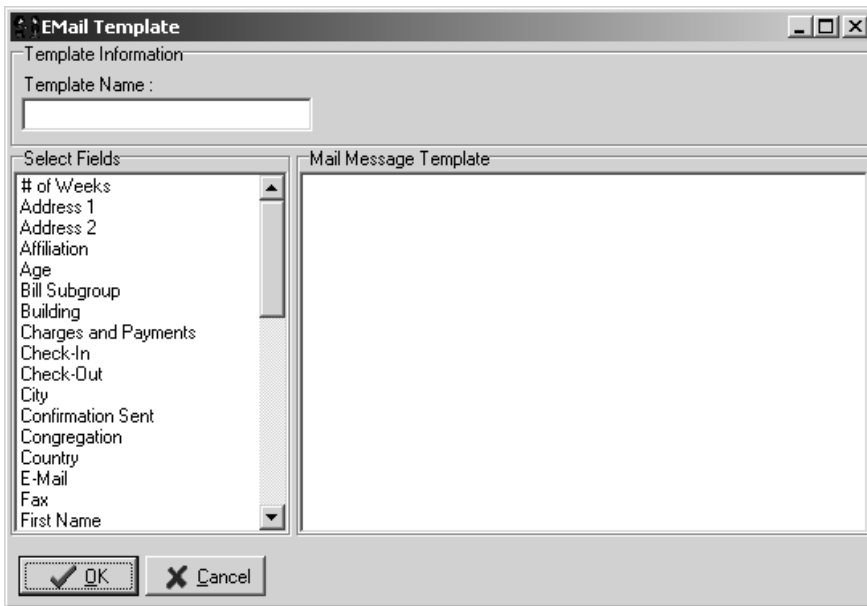


Figure 17-64

3. Type a name for the template in the Template Name field. This name should be something that identifies this email message from others. For example: “Individual Confirmation Letter” or “Group Confirmation Letter.”

In the Mail Message Template field on the right side of the window, type your email message. When you want a piece of information to be customized for the email recipient, instead of typing it, double-click on the appropriate field in the Select Fields list on the left side of the window. For example, if your email starts with “Dear John Smith” but you want every recipient of the email to see their own name instead of “John Smith,” then type “Dear “, then double-click the First Name field in the list on the left, then double-click the Last field in the list on the left (Figure 17-65). The names of the fields appear in your email message in brackets. Wherever field names in brackets appear in your email message, they will be replaced with the correct information for the email recipient when the email is sent.

4. When the email template is complete, click the OK button.
5. Click the Add Template button to create another email template, or click the Cancel button to close the Send Email window.

Section 17: Miscellaneous Functions

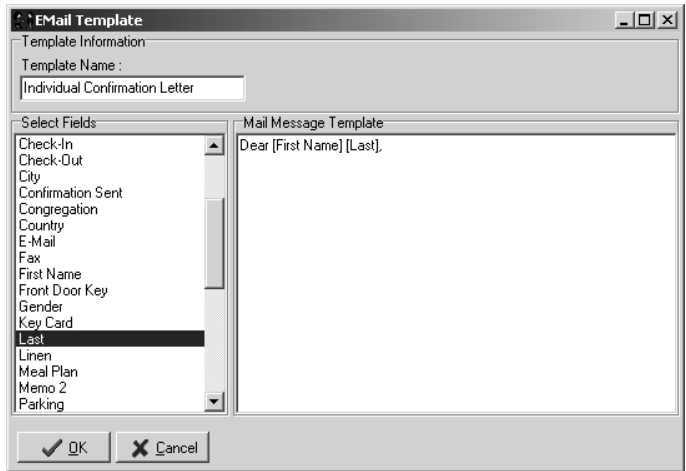


Figure 17-65

Editing an Email Template

1. To edit an email template that already exists, view the General tab of any participant, subgroup contact, or conference contact and double-click on the Email field. The Send Email window will open (Figure 17-60).

Note: You will only see Email Templates for participants if you double-click on the Email field of a participant. Likewise if you double-click the Email field of a subgroup or conference contact.

2. Select the template you want to edit in the Mail Template field. The email template with the customized information for the individual you are currently working with will appear in the large field in the bottom half of the window (Figure 17-66). If you select another email template, click the Refresh button to update the display in the bottom half of the window.

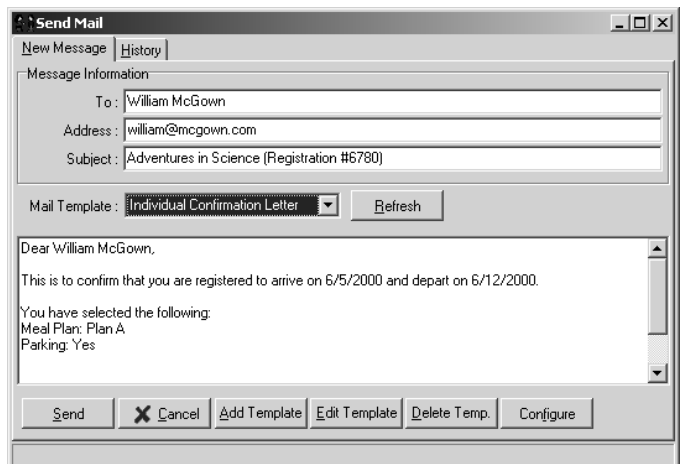


Figure 17-66

Section 17: Miscellaneous Functions

3. Click the Edit Template button on the bottom of the window. The Email Template window will open with the currently selected email template displayed (Figure 17-64). Make your changes and click the OK button.
4. Click the Cancel button to close the Send Email window.

Deleting an Email Template

1. To delete an email template, view the General tab of any participant, subgroup contact, or conference contact and double-click on the Email field. The Send Email window will open (Figure 17-60).
2. Select the template you want to delete in the Mail Template field. The email template with the customized information for the individual you are currently looking at will appear in the large field in the bottom half of the window (Figure 17-66). If you select another email template, click the Refresh button to update the display in the bottom half of the window.



Figure 17-67

3. Click the Delete Temp button on the bottom of the window, then click the OK button in the Confirm window that open (Figure 17-67).
4. Click the Cancel button to close the Send Email window.

Sending an Individual Email Template

You can send an individual email template to any participant, subgroup contact, or conference contact in Conference Programmer and it will contain customized information specific to the email recipient.

1. View the General tab of the participant, subgroup contact, or conference contact you want to send an email to and double-click on the Email field (Although the Send Email window will open if the Email field is blank, email will not be sent unless an email address has been entered). The Send Email window will open (Figure 17-60).
2. The Recipient's name and email address are automatically entered in the To and Address fields. The email's subject is also automatically entered as the conference name and the participant,

Section 17: Miscellaneous Functions

subgroup, or conference number - you can change the subject to anything you want.

3. Select the template you want to send in the Mail Template field. The email template with the customized information for the individual you are currently looking at will appear in the large field in the bottom half of the window (Figure 17-66). If you select another email template, click the Refresh button to update the display in the bottom half of the window.
4. You can modify the email (delete or add anything you want) or send it as is by clicking the Send button.

Sending Multiple Email Templates

You may want to send one email template to many recipients simultaneously. For example, you might want to send a confirmation letter to each of the participants that registered for a conference. The Send Confirmations wizard was designed for this purpose (see Section 17.15: Send Confirmations Wizard).

Email History

You can view any email that has ever been sent from Conference Programmer. For example, you might need to re-read an email to confirm that a specific participant was sent certain information.

1. View the General tab of the participant or conference contact you want to view the email history of and double-click on the Email field. The Send Email window will open (Figure 17-68).
2. Click the History tab to view a list of all emails that have ever been sent to this participant (Figure 17-69). This list displays the date an email was

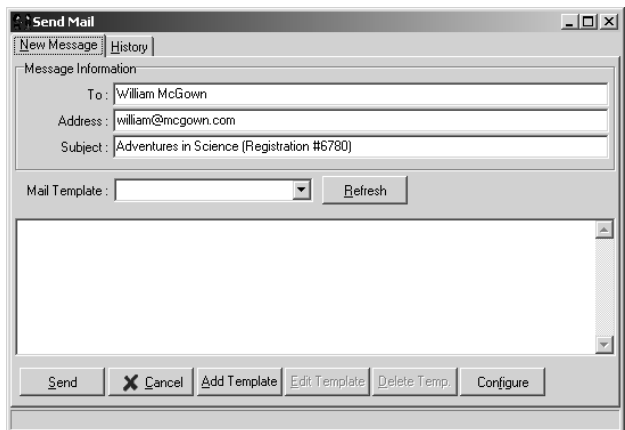


Figure 17-68

Section 17: Miscellaneous Functions

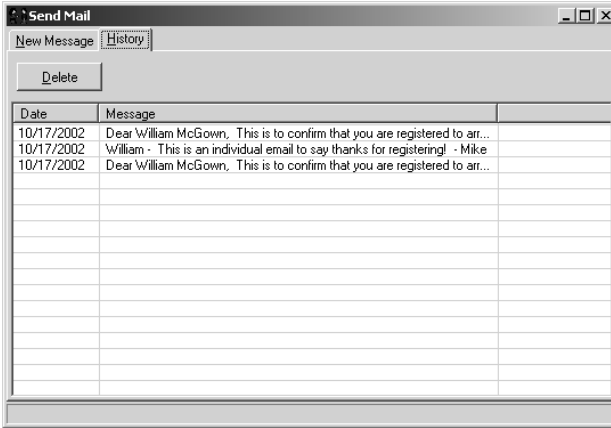


Figure 17-69

sent, plus the first few lines of the email. To view an entire email, double-click on it (Figure 17-70). Click the OK button when done viewing the email.

To permanently delete any email from the history of the current participant, click once on the email, click the Delete button, then click the OK button in the Confirm window that opens (Figure 17-71).

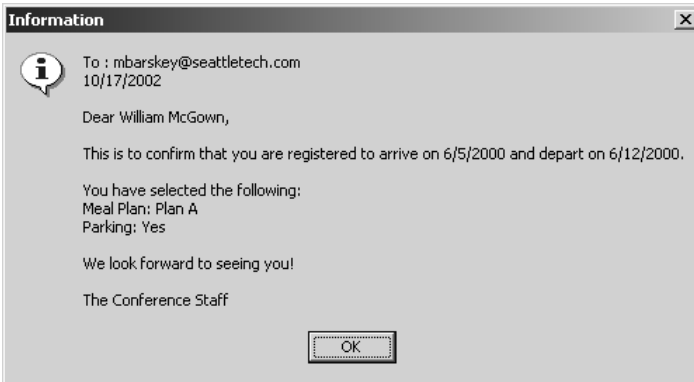


Figure 17-70



Figure 17-71

3. Click the Close button to close the History window. The Close button is the small button with an "X" in the upper right corner of the window (Figure 17-72).



Figure 17-72

17.15 Send Confirmations Wizard

The Send Confirmations wizard can print a report for or send an email to many participants or subgroup contacts at one time, while customizing each report or email for each recipient. It is useful for emailing or printing confirmation letters, printing multiple individual or subgroup invoices, or printing or emailing any custom report or email to many recipients simultaneously.

Section 17: Miscellaneous Functions

Printing Multiple Invoices

Make sure you are working with the conference that contains the participants or subgroup contacts you want to print reports for.

1. In the browse tree, expand Wizards and click Send Confirmations. The Send Confirmation dialog box will appear (Figure 17-73).

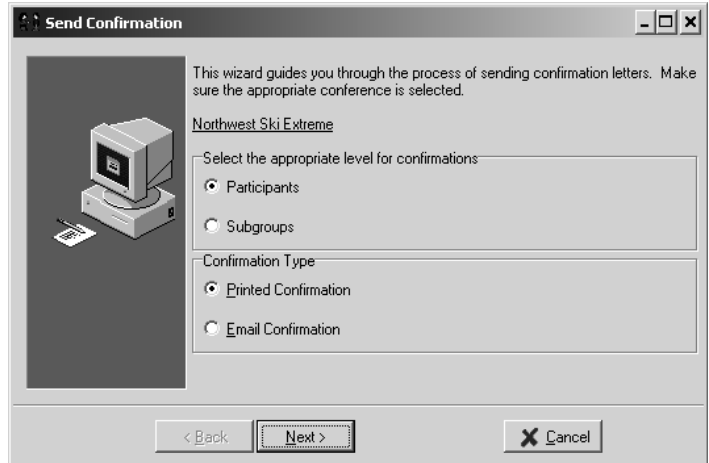


Figure 17-73

2. The wizard can print multiple reports for subgroup contacts or participants. In this example, select Participants and click the Next button. A list of all participants in the current conference is displayed (Figure 17-74).

3. Check the checkboxes next to each participant you want to print a report for. You can check or uncheck all participants at once by clicking the Select All or Clear All buttons, respectively.

4. In the Confirmation Letter field, select the report you want to view or print for the selected participants, then click the Next button.

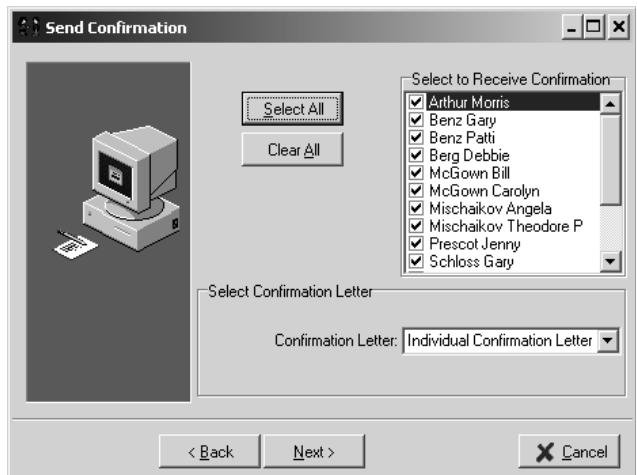


Figure 17-74

Section 17: Miscellaneous Functions

- The report is displayed for all the selected participants or subgroup contacts. Use the buttons at the top of the window (Figure 17-75) to scroll through the pages (see Section 16.1: Viewing Reports).

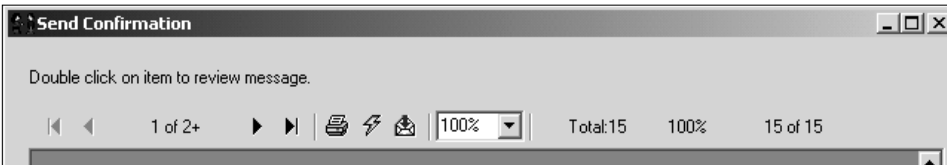


Figure 17-75



Figure 17-76

- Click the Next button. You will be asked whether you want to print the report (Figure 17-76). If you did not print the report in the last step, you can print it now by clicking the OK button. Click the Cancel button if you do not want to print the report.
- Check the "Everything Printed Okay. Tag records now." checkbox (Figure 17-77).

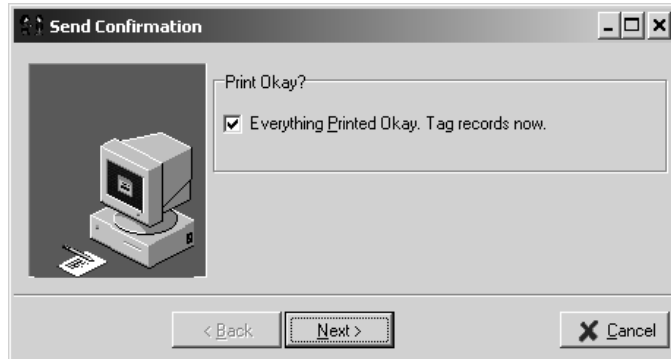


Figure 17-77

By checking the "Everything printed OK. Tag records now." box, you are telling Conference Programmer to mark each participant's record with the time and date that you are running the Send Confirmations wizard. If you run the wizard again, these records will be unchecked by default because they will have been marked as having had the Send Confirmations wizards already run on them once. You will still be able to select these participants manually and run the Send Confirmations wizard for them again.

Each participant or subgroup contact you ran the wizard for will have the date and time that the wizard was run displayed on their record, on the General tab (Figure 17-78).

Section 17: Miscellaneous Functions

- Click the Next button to complete the Send Confirmations wizard.

Sending Multiple Email Templates

You may want to send one email template to many recipients simultaneously. For example, you might want to email a confirmation letter to each of the participants that registered for a conference.

Make sure you are working with the conference that contains the participants or subgroup contacts you want to send email to.

- In the browse tree, expand Wizards and click on Send Confirmations. The Send Confirmations window will open (Figure 17-79).

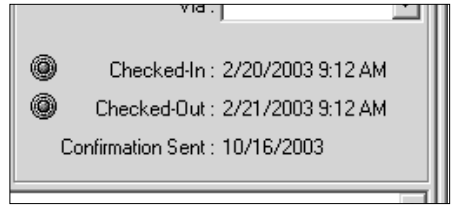


Figure 17-78

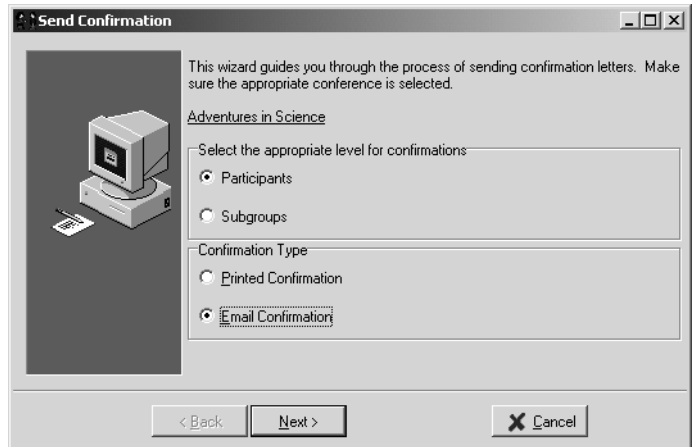


Figure 17-79

- Select whether you want to send emails to Participants of a conference or to Subgroup contacts. Select “Email Confirmation” for the Confirmation Type. Click the Next button.

The top half of the window displays two lists (Figure 17-80): The “Select to Receive Confirmation” list and the “No Email Addresses” list. The “Select to Receive Confirmation” list displays all participants or contacts that have an email address entered in their Email field. The “No Email Addresses” list displays all participants or contacts whose Email field is empty.

Section 17: Miscellaneous Functions

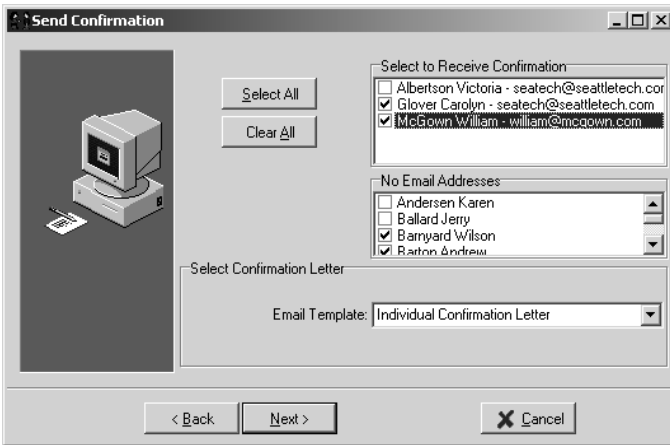


Figure 17-80

The “No Email Addresses” list is informational only - it is to show you those participants without email addresses. A checkmark next to a participant’s name indicates that the Send Confirmations wizard has already been run for that participant. It does not indicate, however, whether the wizard was run for email or for a printed report, or which email template was sent or which report was printed.

3. In the “Select to Receive Confirmation” list, only participants that have a checkmark next to their name will be sent an email. You can check and uncheck any of the participants’ checkboxes.

In the Email Template field, select the email template that you want to send to the selected participants. The email template will be customized for each participant with their specific information. Click the Next button.

4. The window now lists all participants with an email address that you selected to send the email to (Figure 17-81). You can double-click on any participant’s name to view or edit the exact email that will be sent to that participant (Figure 17-82). For example, you could double-click on the name of a participant who is in charge of registering a group of other participants and add a sentence to their email that the other emails won’t have, such as “Please contact me if any of your registrants need special services.” Click the OK button to save any changes you made to a specific email, or click the Cancel button to close the specific email without saving your changes. To send all of the emails, click the Next button, then click the OK button in the Confirm window that opens (Figure 17-83).

Section 17: Miscellaneous Functions

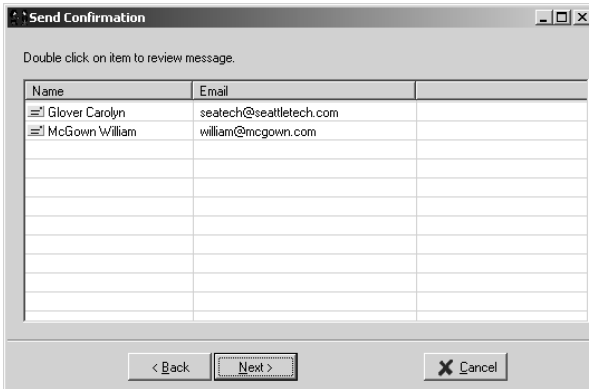


Figure 17-81

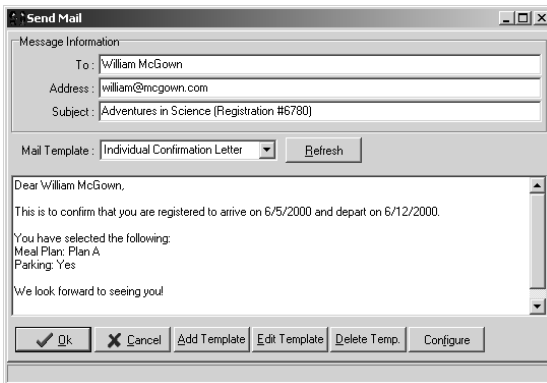


Figure 17-82

5. A checkmark appears next to the names of participants as their email is sent. If all emails are sent successfully, check the “Everything printed OK. Tag records now.” checkbox (Figure 17-84).

By checking the “Everything printed OK. Tag records now.” box, you are telling Conference Programmer to mark each participant’s record with the time and date that you are running the Send Confirmations wizard. If you run the wizard again, these records will be



Figure 17-83

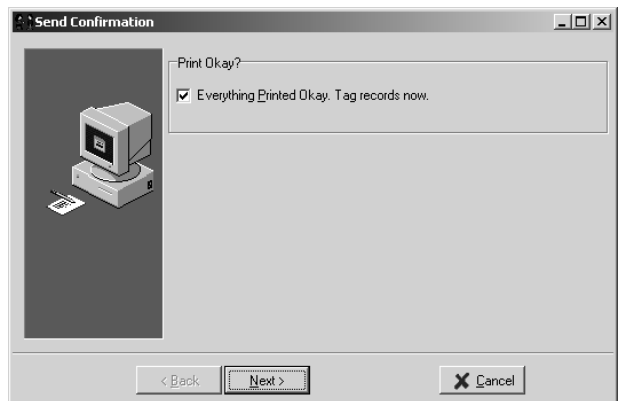


Figure 17-84

Section 17: Miscellaneous Functions

unchecked by default because they will have been marked as having had the Send Confirmations wizards already run on them once. You will still be able to select these participants manually and run the Send Confirmations wizard for them again.

6. Click the Next button to complete the Send Confirmations wizard.

17.16 Room Occupancy Statistics

The Room Occupancy Statistics wizard computes occupancy statistics that exclude maintenance-type groups from your totals. You might have some conferences with rooms blocked specifically to make certain rooms offline - "Maintenance" or "Staff Rooms" conferences for example. Since these rooms cannot be sold, they should not lower occupancy percentages. This wizard allows you to remove them from occupancy percentages.

1. In the browse tree, expand Wizards and click on Room Occupancy Statistics. The Room Occupancy Statistics window will open (Figure 17-85).

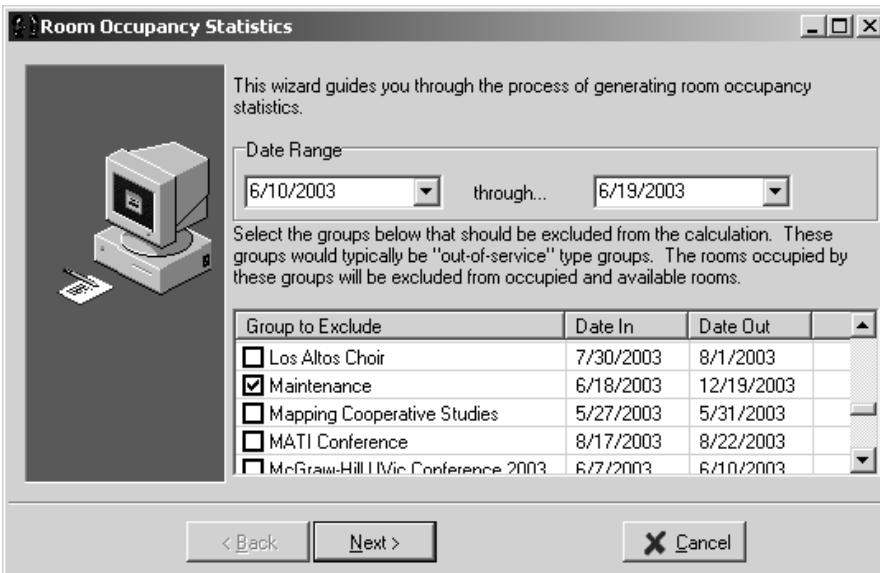


Figure 17-85

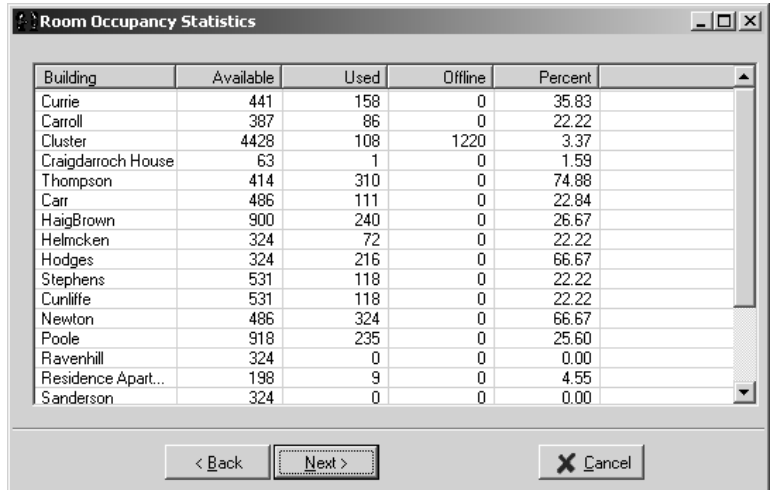
2. A list of all conferences is displayed. Check the checkbox for each conference you do not want included in the statistics; for each conference you want to make "offline." This is different than most lists in Conference Programmer - usually the items you check are

Section 17: Miscellaneous Functions

included in the wizard, but in this case the conferences you select are not included in the statistics.

Enter the date range to report occupancy statistics for.

Click the Next button. The occupancy statistics for each building are displayed (Figure 17-86).



The screenshot shows a window titled "Room Occupancy Statistics" with a table of data. The table has five columns: Building, Available, Used, Offline, and Percent. The data is as follows:

Building	Available	Used	Offline	Percent
Currie	441	158	0	35.83
Carroll	387	86	0	22.22
Cluster	4428	108	1220	3.37
Craigdarroch House	63	1	0	1.59
Thompson	414	310	0	74.88
Carr	486	111	0	22.84
HaigBrown	900	240	0	26.67
Helmcken	324	72	0	22.22
Hodges	324	216	0	66.67
Stephens	531	118	0	22.22
Cunliffe	531	118	0	22.22
Newton	486	324	0	66.67
Poole	918	235	0	25.60
Ravenhill	324	0	0	0.00
Residence Apart...	198	9	0	4.55
Sanderson	324	0	0	0.00

At the bottom of the window, there are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "X Cancel".

Figure 17-86

The Available column shows the potential room-nights available in the date range you specified (Room Count * Nights).

The Used column shows how many occupied room-nights are in the date range you specified. This includes blocked rooms and rooms with participants assigned to them. If a double room has two participants in it, it will only be counted once. If a room holds two people, and only one participant is in it, it will also be counted once.

The Offline column shows how many room-nights are used by the conferences you selected in step 2 in the date range you specified. The conference you selected were not to be calculated in the statistics; they are "offline." In this example, we chose the "Maintenance" conference, which has 1220 room-nights blocked in the "Cluster" building in the date range specified.

The Percent column shows the percentage of the remaining potential room-nights that are used in the date range you specified. The Offline room-nights are subtracted from the Available room-nights, since we don't

Section 17: Miscellaneous Functions

want to count the offline room-nights in our statistics, and the percentage of Used room-nights is calculated against this number (Used / (Available-Offline))

3. Click the Next button to close the wizard.

17.17 Auto Numbering Routine

Conference Programmer can automatically assign sequential numbers to participants in a conference. For example, if you need to assign meal cards to every participant in a conference, and your meal cards are numbered from 1001 to 1499, you can use the Auto Numbering Routing function to assign those numbers to your participants with very little effort.

Make sure you are working with the conference whose participants you want to assign a batch of sequential numbers.

1. In the browse tree, click Conference and click the General tab, then click the Procedures button on the toolbar and select Auto Numbering Routine. The Auto Numbering Wizard window will open (Figure 17-87).



Figure 17-87

2. Select which field you want to use to store the sequential number.

Section 17: Miscellaneous Functions

You can choose from 3 fields: On the left side of the Participant Additional Info tab, the bottom 3 fields can contain integers only - not letters. You can use any one of these fields to store a sequential number in the Auto Number wizard. By default, these 3 fields are called Meal Card, Parking No., and Voucher, but if you have renamed any of them (see Section 17.1: Changing a Field Label), the wizard will display the new field names for you to choose from.

Click the Next button. A list of all participants in the conference is displayed (Figure 17-88).

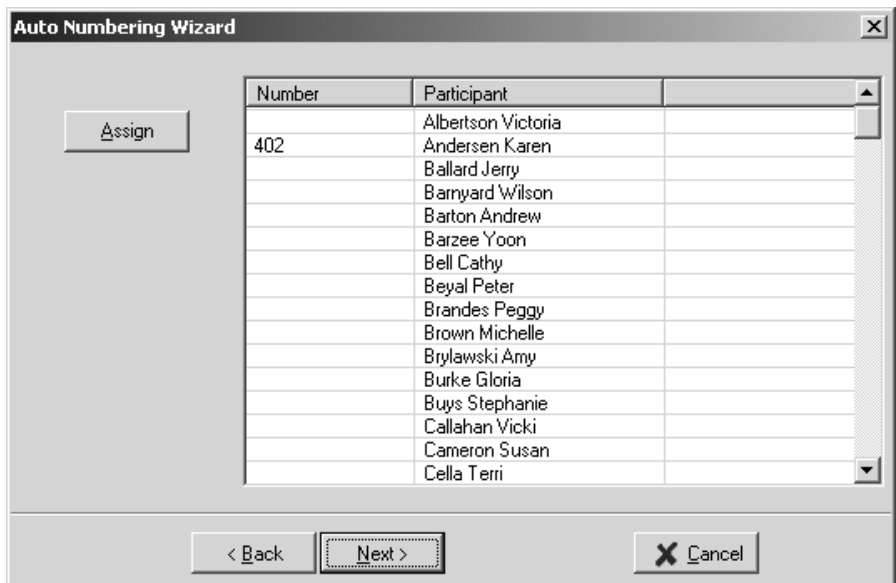


Figure 17-88

The Number column shows the value in the field you chose in step 2. In this example, Karen Anderson already has a value of “402” in the Voucher field, while all the other participants do not have a value in the Voucher field.

3. Click the Assign button. The Auto Number Range window will open (Figure 17-89).
4. Enter the lowest and highest number in the range of numbers you want to assign, then click the OK button.

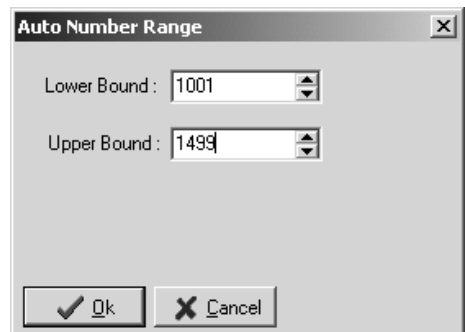


Figure 17-89

Section 17: Miscellaneous Functions

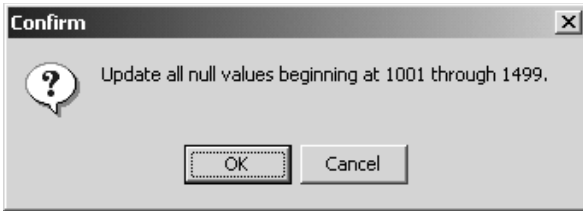


Figure 17-90

A confirmation window opens (Figure 17-90). Click the OK button to assign the sequential numbers to all participants in the conference who do not have a value in the field you selected in step 2. In this example, when we click the OK

button, all participants except Karen Anderson will be assigned sequential numbers between 1001 and 1499 - Karen Anderson's record will be ignored, leaving the "402" value in the Voucher field (Figure 17-91). Click the Cancel button if you have made a mistake and do not want to assign the numbers to the participants.



Figure 17-91

Figure 17-92 shows Victoria Albertson's record with the sequential number assigned to her Voucher field.

5. Click the Next button to close the wizard.

17.18 Interactive SQL Window

The Interactive SQL wizard is a potentially dangerous tool, and should only be used by those with a strong knowledge of the SQL language. This wizard allows you to enter SQL commands to directly interface with the

Section 17: Miscellaneous Functions

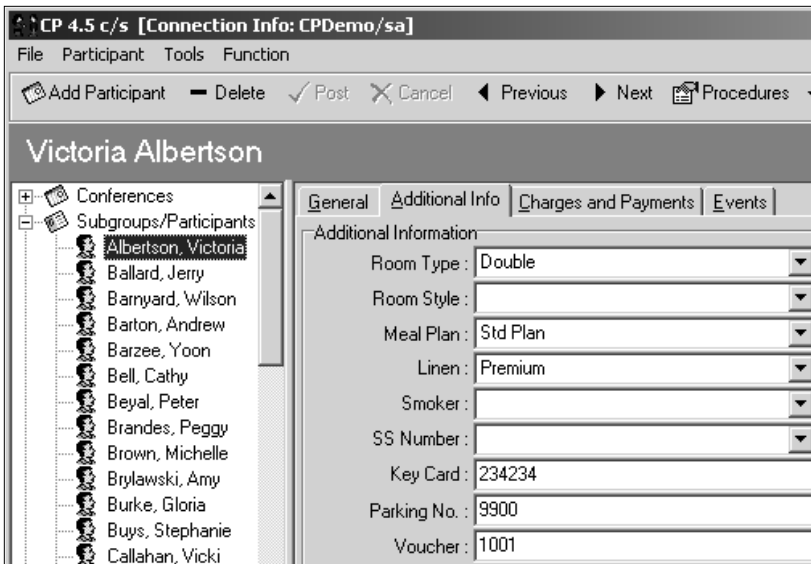


Figure 17-92

database, without any error checking or graphic interface. If you issue the wrong command, or an incomplete command, you could easily delete your entire database.

1. In the browse tree, expand Setup and click Interactive SQL Window. The Interactive SQL Window will open. Click the Next button (Figure 17-93).
2. In the top half of the window, type a SQL statement.
3. Click the Run SQL button to tell the database server to execute the SQL statement.

The results from the database server, including errors, are returned in the bottom half of the window

4. Repeat steps 2 and 3 for more SQL statements, or click the Next button to close the wizard.



Figure 17-93

Section 17: Miscellaneous Functions

17.19 Tools Menu

From the Tools menu (Figure 7-94) you can debug problems, access Seattle technology Group, Inc. resources on the internet, and change a few settings in Conference Programmer.

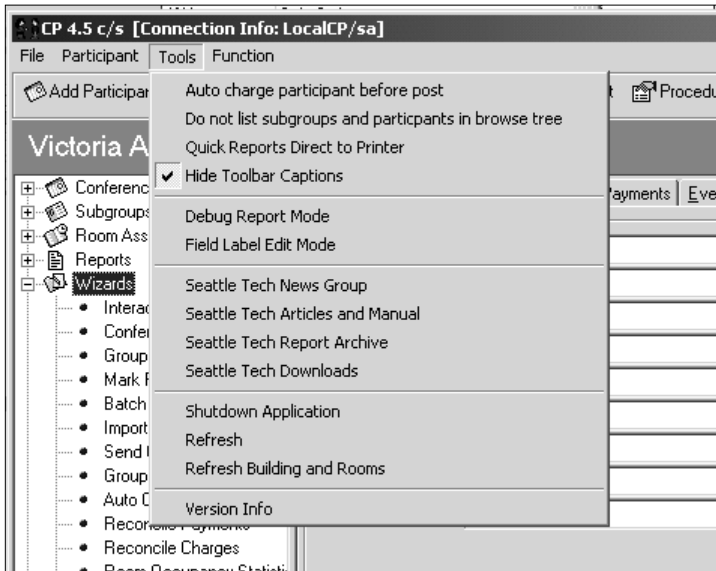


Figure 17-94

If “Auto charge participant before post” is checked, a participant’s charges will automatically be recalculated whenever you make a change to their record and click the Post button. This can be helpful because changes you make to a participant’s record could affect what they should be charged. If the “Auto charge participant before post” is not checked, you will have to manually click the Auto charge button to update their charges.

If “Do not list subgroups and participants in browse tree” is checked, the list of subgroups and participants in the browse tree is limited to only the subgroup or participant you are currently working with - not every subgroup or participant in the conference. If you have a conference with 1,000 subgroups or participants, scrolling through the list might be more hassle than help. Also, when the “Do not list subgroups and participants in browse tree” is checked, conferences will load faster.

If “Quick Reports Directly to Printer” is checked, when you select a Quick Report from the Quick Report button on the toolbar or a Subgroup Report from the Subgroup Report button on the toolbar, the report will be

Section 17: Miscellaneous Functions

printed immediately and will not be previewed on the screen. If “Quick Reports Directly to Printer” is not checked, the Quick Report or Subgroup Report will be previewed on the screen, but you can still print it by clicking the Print button.

If “Hide Toolbar Captions” is checked, the name of each button in the toolbar will disappear and the toolbar will only display icons for the buttons. In this mode, if you hover the mouse over a button without clicking the mouse button for a few seconds, the name of the button will appear temporarily. When you uncheck “Hide Toolbar Captions,” “Show Toolbar Captions” is displayed unchecked in the menu instead.

If “Debug Report Mode” is checked, one or more windows will appear every time you preview a report. These windows display the SQL statement(s) used to gather data for the report, which is useful if you are having problems figuring out why a custom report is not working.

“Field Label Edit Mode” is described in Section 17.1: Changing a Field Label.

If you select “Seattle Tech News Group,” your internet browser will load the web page with the Seattle Technology Group, Inc. News Group. This is a forum where all Conference Programmer customers can post messages to each other; asking how others use Conference Programmer, sharing your own techniques, discovering new ideas, etc.

If you select “Seattle Tech Articles and Manual,” your internet browser will load the part of the Seattle Technology Group, Inc. web page that contains the Conference Programmer manual and other documentation. Here you can view the documentation, or download it to your computer to view or print later.

If you select “Seattle Tech Report Archive,” your internet browser will load a web page that contains the examples of the standard reports that come with Conference Programmer. Here you can learn what each report does, because there are previews of each report using demonstration conferences and participants. If you are missing any of these standard reports, you can download them from this web page, as well as learn the configurations to plug them into your version of Conference Programmer.

If you select “Seattle Tech Downloads,” your internet browser will load the part of the Seattle Technology Group, Inc. web page that contains Conference Programmer installers and helpful utilities.

Section 17: Miscellaneous Functions

“Shutdown Application” should only be used in emergencies. When you close Conference programmer, it performs various integrity checks and cleanup functions on the data. In rare instances, Conference Programmer may refuse to close because the functions cannot complete, possibly due to a Windows crash or network problem. In those cases, you can select “Shutdown Application” to force Conference Programmer to quit without performing any of the closing functions.

If you select “Refresh,” the current conference will be reloaded. This is useful to assure you are looking at the most current version of the data. When you first select a conference, Conference Programmer loads everything about that conference, including a list of participants. If, however, another user adds a participant while you are working with that conference, you will not see that new participant until you reload that conference. You can reload the conference by selecting another conference and then selecting the original conference again, or by quitting and relaunching Conference programmer - or simply by selecting “Refresh” from the Tools menu.

If you select “Refresh Buildings and Rooms,” the current room inventory will be reloaded. This is useful to assure you are looking at the most current version of the data. When you first load Conference Programmer, the room inventory is loaded into memory. If, however, someone adds, changes, or deletes a room or building while you are working in Conference Programmer, you will not see the updated room inventory until you quit and relaunch Conference Programmer - or you can simply select “Refresh Buildings and Rooms” from the Tools menu.

If you select “Version Info,” a window opens displaying the version of Conference Programmer that you are using. This is useful information to have when working with Seattle Technology Group, Inc. technical support.
