Efficiency

Event Management Manual

Version 4.6

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Event Management Module Set-up

Prior to using the Event Management Module please check these areas of Efficiency are already set-up:

Supervisor

- Operating Divisions
- Executives
- Payment Tables
- Security
- Users
- Functional Security

Modules

- Campaign Maintenance
- Activity Maintenance
- Vendor Maintenance
- Company Maintenance
- Contact Maintenance
- Membership Desk
- Product Maintenance (If Loyalty points is to be used)
- Mail Desk

Now you can set-up the Event Management Specific Codes and Flags

Event Codes and Flags

Important Information about Codes and Flags

The following code and flag tables should be set-up during the initial set up. Each table requires at least one record. The system will provide a default record of:

Code: 00000

Description: Default Record of…

It is recommended to keep at least one default record in each table.

The following tables (listed with their descriptive names, the database names are given on the detailed section for each item) can be grouped in three categories:

- Mandatory/ Strongly Recommended
- Optional
- Site Specific

Venue Codes and Flags

Mandatory or Strongly Recommended

At least one record must exist in the following Codes and Flags tables:

Venue Status	Corporate Level
Venue Type	Corporate Level
Building	Corporate Level
Venue	Corporate Level

Event Codes and Flags

Mandatory or Strongly Recommended

At least one record must exist in the following Codes and Flags tables:

Event Status	Corporate Levels
Event Types	Corporate Levels
Event Option	Corporate Levels

Optional i.e. Default value may be used

The details in these tables are optional and may be set up based on the site requirements

Event Profile Groups	Operating Division Level
Event Profile Items	Operating Division Level
Event Transaction Category	Corporate Level
Event Transaction Status	Corporate Level
Event Transaction Type	Corporate Level

System and User Options

Mandatory or Strongly Recommended

The system options (Shared) must be set-up to suit the application and business rules.

Event Management Shared Options	Operating Division Level

Optional i.e. Default value may be used

The user options (User and Report) must be set-up to suit the user's positions and preferences.

Event Management User Options	User Level

Site-Specific

In this category the tables are deigned for site-specific purposes and some of them may be mandatory or simply for secondary information. Your support organisation will have all the details of these tables and the set up requirements.

Venue Status

The Venue Status code groups the Venue records by their status, i.e. Available, Not Available, Closed, and On Lease etc.

Venue Status Tables and Fields

The Venue Status data is maintained in the Venue Status (venustat) table.

The data in this table should be designed to address the needs of the entire corporation.

Venue Status fields in table VENUSTAT

Field Name	Field Description
Venue Status Id	A unique identification code.
Description	The description of the venue status
Background Colour	Double click on this window to select a background colour that will be used the graphics presentation of the status
Text Colour	Double click on this window to select a text colour that will be used the graphics presentation of the status

Venue Status Codes

Status Id	Description
00000	*Default Venue Status*
A	**Active**
C	**Closed**
NA	**Not Available**

Key
abc This highlights the typical recommended records.
abc This highlights the mandatory or system dependant records.

The basic data values for the Venue Status are provided with the software

Venue Status Hints and Tips

- The Codes for the Venue Status records should be created manually.
- The “C=closed”, “NA=Not Available” and ‘A=active’ codes must exist in the table at all times.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Event Status

The Event Status code is used to group the Event and Event Split records by their current status, i.e. Open, Closed etc.

Event Status Tables and Fields

The Event Status (evenstat) table maintains Event Status data.

The data in this table should be designed to address the needs of the entire corporation.

Event Status fields in table EVENSTAT

Field Name	Field Description
Status Id	A unique identification code.
Description	The description of the event status

Event Status Codes

Status Id	Description
00000	*Default Event Status*
O	**Open**
C	**Closed**

Key
abc This highlights the typical recommended records.
abc This highlights the mandatory or system dependant records.

Event Status Hints and Tips

- The Codes for the Event Status records should be created manually.
- The “C=closed”, ‘O=open’ codes must exist in the table at all times.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Event Type

The Event Type code is used to group the Event, Event Split and Event Venue records for their types, i.e. Lunch, Seminar etc.

Event Type Tables and Fields

Event Type (eventype) table maintains the Event Type data.

The data in this table should be designed to address the needs of the entire corporation.

Event Type fields in table EVENTYPE

Field Name	Field Description
Event Type Id	A unique identification code.
Description	The description of the event type

Event Type Codes

Type Id	Description
00000	Default Type
LUNCH	Lunch
SEM	Seminar
FOOTY	Football Game

THEAT	Theatre

Key
abc This highlights the typical recommended records.
abc This highlights the mandatory or system dependant records.

Event Type Hints and Tips

- The Codes for the Event Type records should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Event Transaction Type

The Event Transactions Type code is used to group the Event Transactions records within the Type Groups

If the transactions are used for varying data as a data warehouse and presented in different datawindow objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Event Transaction Type Tables and Fields

The Event Transaction Type data is maintained in the Event Transaction Type (eventrnt) table.

The data in this table should be designed to address the needs of the entire corporation.

Event Transaction Type fields in table EVENTRNT

Field Name	Field Description
Transaction Type Id	A unique identification code.
Description	The description of the Transaction Type

Event Transaction Type Codes

Type Id	Description
00000	*Default Type*
T1	**Type One**
T2	**Type Two**

Key
abc This highlights the typical recommended records.
abc This highlights the mandatory or system dependant records.

Event Transaction Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Event Transaction Status

The Event Transactions Status code is used to group the Event Transactions records within the Status Groups

Event Transaction Status Tables and Fields

The Event Transaction Status data is maintained in the Event Transaction Status (eventrns) table.

The data in this table should be designed to address the needs of the entire corporation.

Event Transaction Status fields in table EVENTRNS

Field Name	Field Description
Transaction Status Id	A unique identification code.
Description	The description of the Transaction status

Event Transaction Status Codes

Status Id	Description
00000	*Default Call Status*
C	**Closed**
A	**Active**

Key

abc	This highlights the typical recommended records.
abc	This highlights the mandatory or system dependant records.

The basic data values for the Event Transaction Status is provided with the software

Event Transaction Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Event Transaction Category

The Event Transactions Category code is used to group the Event Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different datawindow objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Event Transaction Category Tables and Fields

The Event Transaction Category data is maintained in the Event Transaction Category (eventrnc) table.

The data in this table should be designed to address the needs of the entire corporation.

Event Transaction Category fields in tableEVENTRNC

Field Name	Field Description
Transaction Category Id	A unique identification code.
Description	The description of the Transaction Category

Event Transaction Category Codes

Type Id	Description
00000	*Default Type*
C1	**Category One**
C2	**Category Two**

Key

abc	This highlights the typical recommended records.
abc	This highlights the mandatory or system dependant records.

Event Transaction Category Hints and Tips

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Venue Type

The Venue Type code are used to group the Venue and Event Venue records for their types, i.e. Conference Room, Restaurant etc.

Venues for Internal Meetings

A specific Venue Type should be assigned to the internal meeting and conference rooms. This Id should be registered in the User System Options under the Shared > Activity > Venue Type for Meetings. The venue records within this type are displayed on the drop down lists on the Activity and Executive Availability maintenance windows and the Venue Allocation display windows.

Venue Type Tables and Fields

The Venue Type data is maintained in the Venue Type (venutype) table.

The data in this table should be designed to address the needs of the entire corporation.

Venue Type fields in table VENUTYPE

Field Name	**Field Description**
Venue Type Id	A unique identification code.
Description	The description of the venue type

Venue Type Codes

Status Id	**Description**
00000	*Default Venue Type*
REST	**Restaurant**
CONFROOM	**Conference Room**
STAD	**Stadium**
MEETROOM	**Internal Meeting Room**

Key

abc This highlights the typical recommended records.

abc This highlights the mandatory or system dependant records.

Venue Type Hints and Tips

- The Codes for the Venue Type records should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Options

Event Option Items are maintained in the event Option Items table (evenopit). The data in this table is usually designed to reflect the requirements of all the Operating Divisions.

Event Options are used assigning unlimited number of attributes and options to the Event Split, Venue and Guest records.

These codes are grouped in the Event Option Groups Table (evenopgr). The data in this table should be designed to address the needs of the entire corporation.

The data in the Event Option Group Table must exist before entering data in the Event Option Items Table.

Options Tables and Fields

The user can maintain the following fields in the Event Option Group and Item tables.

Event Option Group fields in table EVENOPGR

Field Name	**Field Description**
Option Group Id	A unique identification code.
Description	The description of the option group

Event Option Item fields in table EVENOPIT

Field Name	**Field Description**
Option Item Id	A unique identification code for the option item
Description	The description of the option item
Option Group Id	A unique identification code for the option group.

The data in the Option Group Table must exist before entering data in the Option Items Table.

The following is an example of the typical values in the Event Options tables

Event Option Group Codes

Group Id	**Description**
00000	*Default Option Group*
REST	**Restaurant Options**
CONFROOM	**Conference Room Options**
STAD	**Stadium Options**
CARPARK	**Car Park Options**
MEETROOM	**Internal Meeting Room Options**
GUEST	**Guest Options**

Event Option Item Codes

Group Id	Item Id	Description
00000	*00000*	*Default Option Item*
REST	**REST01**	**Non Smoker**
	REST02	**Italian Cuisine**
	REST03	**Asian Cuisine**
CARPARK	**CARP01**	**Open until midnight**
	CARP02	**No Charge to Guest**
	CARP03	**Charge to Guest**
	CARP04	**Outdoor car park**

Key

abc This highlights the typical recommended records.

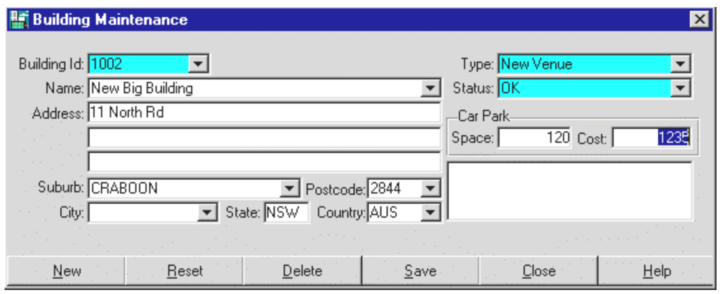
abc This highlights the mandatory or system dependant records.

Options Hints and Tips

- The Codes for the Event Option Group and Item records should be created manually.
- Each table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- Option codes are used for Event, Venue and Guests

Building Maintenance

The building maintenance screen allows you to add or maintain buildings



This option is accessed from the menu or from the Venue Maintenance window.

Fields

Building Id: The system generated a new unique id for new building.

Name: The name of the building.

Address: The street address of the building (three lines).

Suburb, Postcode, State, Country: Select Suburb or Postcode from the drop down, other information is populated by the system.

City: Select city from the dropdown after entering the country if required.

Type: The type of the venue building selected from the dropdown list.

Status: The status of the venue building selected from the dropdown.

Car Park Space: The number of the car space available in the car park.

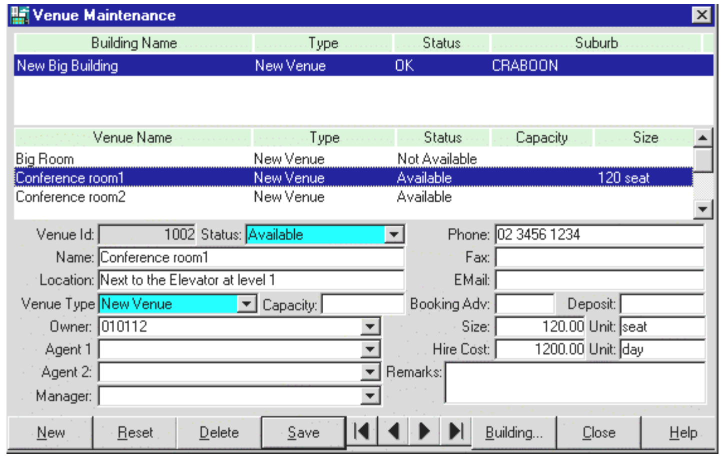
Car Park Cost: The car parking cost.

Remarks: Comments and remarks for the building.

Venue Maintenance

The venue maintenance window is used for maintaining and adding new venues for the buildings in the event management module.

Meeting Venues (for activity and appointments) are grouped under a special type. The meeting type then registered in the Activity section of the Shared Options.



To access this option select Prepare – Module Codes – Venue in Event Management module main menu.

Each venue has to belong to a building when first created.

The venue maintenance screen is made of 3 sections, top section lists the building, the middle section lists venues under each building and the third section is for creating and maintaining new venues.

Fields

Venue Id: A unique identification code for venue.

Name: The name of the venue.

Status: The status of the venue selected from the dropdown list.

Location: The location of the venue.

Type: The type of the venue selected from the dropdown list.

Capacity: The capacity of the venue.

Note: For the next four fields, enter the first few letters of the company name and activate the dropdown list.

Owner: The owner of the venue selected from the dropdown company list.

Agent 1: The first agent for the venue selected from the dropdown company list.

Agent 2: The second agent for the venue selected from the dropdown company list.

Manager: The managing agents for the venue selected from the dropdown company list.

Phone: The phone number of the venue.

Fax: The fax number of the venue.

E-Mail: Email address for the venue.

Booking Adv: The numbers of days required in advance to book the venue.

Deposit: Amount of deposit required to book the venue.

Size: The size of the venue in units.

Unit: The description of the unit for the size.

Hire Cost: The costs of the hire in units.

Unit: The description of the unit for the hire.

Remarks: The comments and remarks for venue maintenance.

Note: The building can be edited at any stage of venue record creation, to access it simply press the building command button to edit the building screen

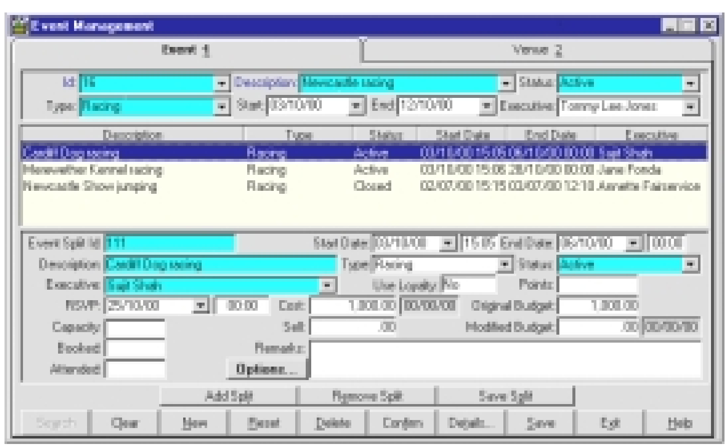
Event and Event Splits

The Event Management in Efficiency is designed to enhance its TOTAL CUSTOMER and CLIENT MANAGEMENT concept.

Whether you are conducting corporate lunches or seminars to public or selling events for your members the following immediate benefits will be enjoyed by your organisation.

- Set up and Manage Events
- Distribute Events to unlimited number of Splits and Venues.
- Produce invitations automatically or by selecting via the selection criteria from the Mail Desk and generate Guest Lists for individuals or corporations.
- Provide a consolidated schedule of venue and facility bookings by event and event splits
- Manage Event Sponsorships.
- Maintain Options for Events, Venues and Guests.
- Maintain activity history for corporations, sponsors and individuals.
- Maintain loyalty points for the event splits.
- Receive Payments and Post the totals to the accounting systems (Available in the next release).
- Produce management and decision support reports
- Monitor and assist in the distribution and management of event and event task related information to/from all stake holders of an event
- Monitor event booking, associated tasks, work orders, the resources required to stage the event and the costs associated with these activities (through the third party financial system)
- Provide details of venue hire and their event requirements.

The Event Management Tab is used to create and maintain the Event, Event Split, Event Venue and Guest records and to perform various functions on the tab folder.



How to Find an Existing Event Record?

There are two ways of finding an existing record.

1. On Screen Search

You can find the existing event record using any combination of the following fields:

- Executive
- Event Status
- EventType

You should always type in at least 2 or 3 letters of the search field. Click on the drop down arrow or press the <F4> key.

The pre – keyed in letters will act as an instant filter and the system will display you a drop down pick list of the events starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required name and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the event's data On the other hand if you had clicked on the pick list then the selected data will de displayed on the field. Now either click on any other field at the top section of the window or simply press the tab. The event's data will be displayed as a previous selection.

Note: Your access to some events may be limited by your current access privileges.

2. Search by Search Engine

When the Search button was clicked the search engine window is displayed:

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Event window with the selected event record.

If an event description fully or partially was entered in the event screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

How to Create a New Event Record?

When you are ready to create a new record click on the <NEW> button.

If the system was set to an "AUTOMATIC" id creation mode a system generated sequential number will be displayed in the ID field. Otherwise, enter a unique identification code for this event.

The MANUAL Id assignment is recommended.

Your cursor will be moved to the Description field so that you can start entering the new data.

When the new event header record is saved, press the <Add Split>t button to create the event split.

Enter event split Id and the rest on the information in the data fields.

Event Fields

The Event header section maintains the following fields:

Id: The unique identification code for the event.

Description: The brief description of the event.

Status: The current event status.

Type: The event type.

Start: The start date of the event.

End: The completion ending dating for the enevt.

Executive: The executive who is responsible for the event.

Event Split Fields

Event split Id: A unique Id for the event split.

Description: The description of the event split.

Executive: The executive who is responsible for the event split.

RSVP: The date on which the RSVP is due.

Time: The RSVP time.

Capacity: The attendee capacity for the event split.

Booking: The number of booking for this event split.

Attended: The number of people attended the event split.

Start Date: The starting date and time for this event split.

End Date: The completion date and time for the event split.

Type: The type of this event split.

Status: The status of the event split.

Use loyalty: Yes if the loyalty points to be used.

Points: The loyalty points.

Cost: The total cost of the event split.

Sell: The selling price for the event split.

Remarks: Comments and remarks for the event split.

Original Budget: The original budget for the even split.

Modified budget: Modified budget for the event.

Command Buttons

Search
Activates the search engine.

Clear
Clears the screen so a new record can be entered into the system.

New
Click on the button if you wish to create a new event.

Reset
Click on the button if you wish to bail out of changes you have made.

Delete

Deletes the event and all the related records.

Confirm
Starts the confirm window to enter the RSVP or apologies for the invitations and to create guest lists for the event.

Details
Will activate the company and company site details.

Save
Saves the changes.

Exit
Click on this button if you wish to exit out of event module.

Help
Activates the help screens relevant to this section.

Options
This button will activate the event options screen.

Add Split
Creates a new event split.

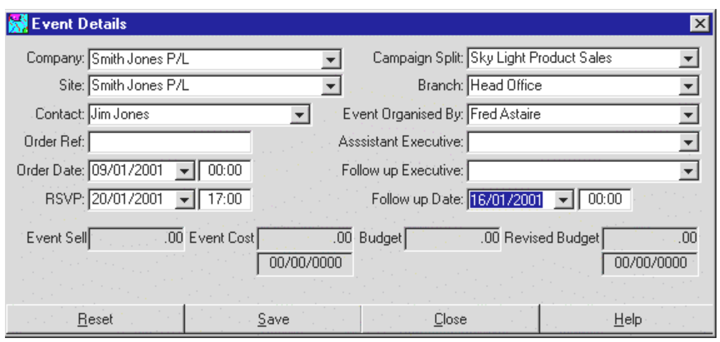
Remove Split
Removes the event split and its related records.

Save Split
Saves the event split.

Event Details

The event details button will allow you to book an Event to a company or to an organisation.

The Event can be maintained as usual on behalf of the external organisation.



Fields

Company: The company Id that owns this event

Site: The site id that owns this event.

Contact: The contact id of the client who is the host for this event.

Order Ref: The customer order reference number.

Order Date: The date and time of the customer order.

RESVP: The RSVP date and time for this event.

Campaign Split: The campaign split code relating to this event.

Branch: Branch id.

Event Organised By: The id of the executive who has organised this event.

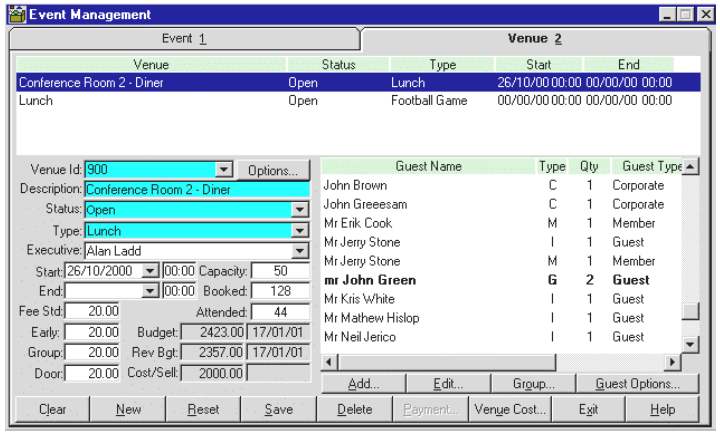
Assistant Executive: The id of the executive who assistant for this event.

Follow Up Executive: The id of the executive who will follow up the invitation.

Follow Up Date: The date and time this event invitation should be followed up.

Event Venues

The Event Venue tab is to create and maintain the venues for the event split as well as the cost and the guest lists.



There are three sections on this tab. The top section displays the venues assigned to the split. The lower left side is to enter and maintain the venue details. The lower right side displays the list for the selected venue.

Venue Fields

Venue Id: Select the venue id from the dropdown list.

Description: The description of the venue for the event split. The default venue description can be overwritten.

Status: The status of the venue split.

Type: The type of the event split.

Executive: The executive who is responsible for the execution of the event split in the venue.

Start Date: The starting date and time for the event split in the venue

End Date: The completion date and time for the event split in this venue.

Fee Std: The standard entrance fee for the venue event.

Early: The early bird entrance fee for the venue event.

Group; The group entrance fee for the venue event.

Door: The pay at the entrance fee for the venue event.

Capacity: The maximum number of people who can attend the event in the venue.

Booked: The number of people booked for the event.

Attended: The number of people attended the event split in the venue.

The Budget, Revised Budget, Sell and Cost value and dates are updated by the system.

Option: Will activate the venue option window to maintain the options for this venue for the event split.

Venue Command Buttons

New
To create a new venue for the event split.

Clear
To clear the screen so a new venue can be attached to current event split.

Reset
To bail out of current changes and to reset the screen to the original status.

Save
Save the new venue split information.

Delete
To delete the venue split details.

Venue Cost
Will activate the venue cost window.

Event Venue Guest List

The lower right section of the tab displays the guests for the venue event.

The groups are displayed in bold under the group leaders name.

The type is the type of the guest. I=Individual, G=Group, C=Corporate, M=Member

Guest Status is one of the following:

- Confirmed
- Attended
- Not Attended
- Other

The Pay status could be Blank, Paid or Paid by Others. Double click on the guest line will start the Guest Detail (Maintenance) window

Command Buttons for Guest List

Edit
This will edit the Guest Details screen (same as double click).

Add
Will activate the add guest screen to add a guest to the event split for the venue. Just before that system will display a dialogue window from which if the guest venue record to be created for

- Event
- Event Split
- Single Venue

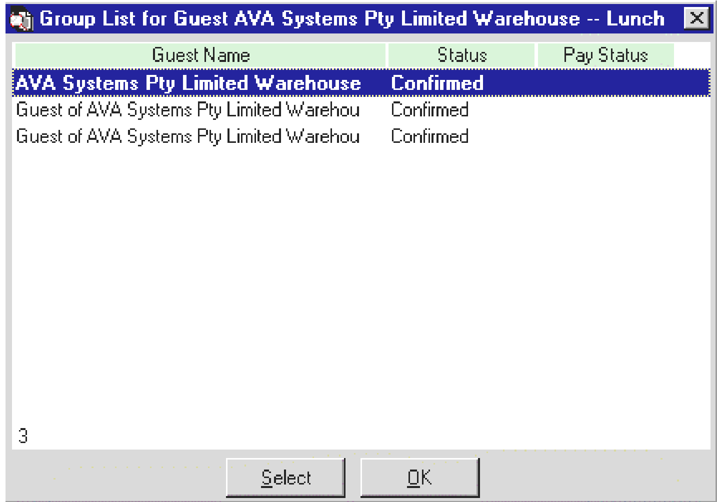
can be pre-determined.

Group
Will activate the group list for the selected guest item.

Guest Option
Will activate the guest option window to enter and maintain the options for the selected guest line. If there were already assigned options to the guest the text on the command line is displayed in bold.

Group Guest List

This window lists the members of the group who are attending the event.



Double click on the selected item to display the guest list details for the member of the group.

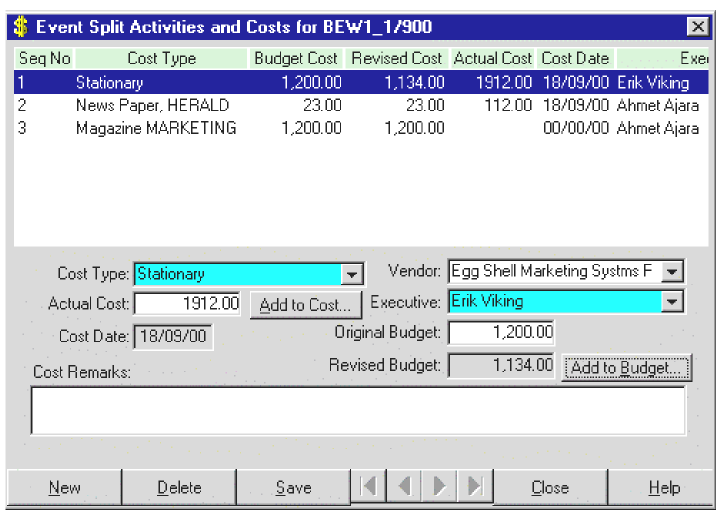
Event Split - Venue Costs

An event split venue usually relates to any number of activities and each activity usually relates to a budget and an accumulated cost.

The cost types (activities) i.e. Design, Print, Mail, Telemarketing etc are all maintained at the Cost Type Maintenance Window.

IMPORTANT NOTE: The Campcost table must be set to "AUTO' id creation mode by the supervisor.

The split activities (costs and budgets) are maintained on the Event Split Activities Maintenance Window.



Click on the <New> button to create a new activity (cost) entry or double click on the highlighted existing item at the selection window.

Cost Type: Select an appropriate cost type.

Actual Cost: To enter a cost value or to add a new value click on the <Add to Cost> button next to this field. Enter the new value in the pop up window.

Cost Date: The date of the last cost entry will be stamped automatically.

Remarks: Any general remarks for this activity.

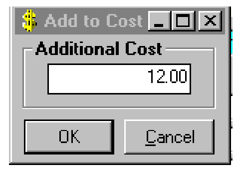
Executive: Select the executive who is responsible for this activity (expenditure).

Original Budget: Enter here the original budget value.

Revised Budget: To enter a revised budget or to add a new value click on the <Add to Budget> button next to this field. Enter the new value in the pop up window.

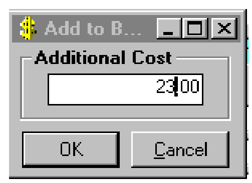
Add to Cost

Click to enter an additional cost to this line item.



Add to Budget

Click to enter an additional budget amount to this line item.



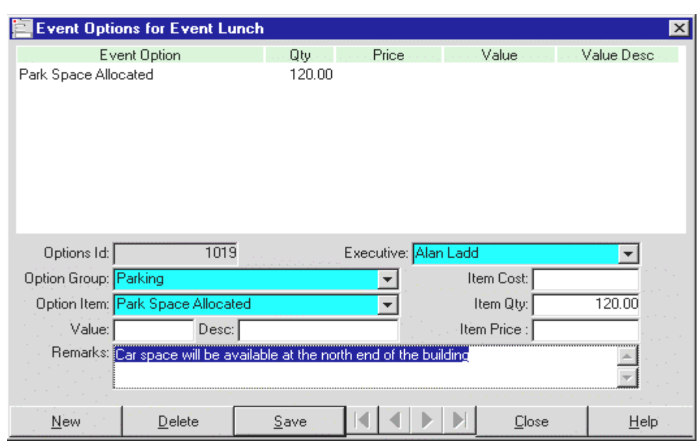
Event Options

The event options window is designed to specify the options required for each of the following event levels:

- Event split
- Event Venue
- Guest
- Guest Attendance

There is an <Options> button on each of the above data entry windows to activate the following Options Maintenance window. If there were any options attached to the record then the text on the options button will be displayed in bold.

The Options maintenance window is a Select-Entry type window.



Fields

Option Id: A unique identification code created by the system.

Option Group: Option group selected from a dropdown list.

Option Item: Option item selected from a dropdown list after entering the option group.

Value: The value for the item.

Desc: The description of the value. This is a free formatted field and usually holds commonly recognised unit or description, i.e. Qty, m2, Litres etc.

Remarks: Comments and remarks for the option.

Executive: The executive Id who is responsible for the even selected from the dropdown list.

Item Cost: The cost of the option item.

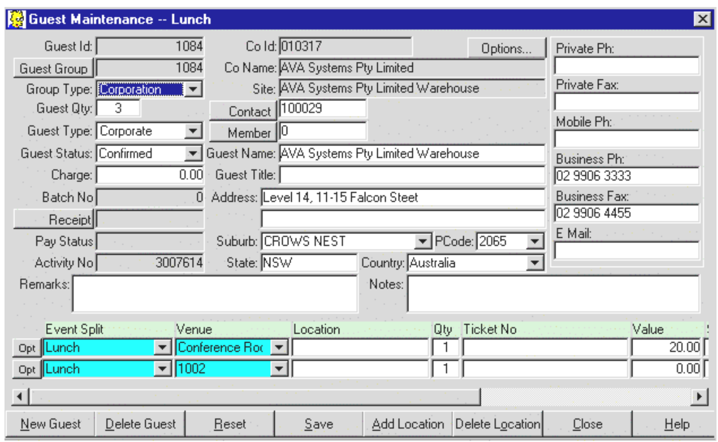
Item QTY: The quantity of option item.

Item Price: The price of option item.

Guest Details

The guest maintenance screen is used to add and maintain the guest list attending the event.

This screen can be accessed from add button from venue tab folder.



Fields

Guest id: A unique identification number for the guest.

Guest Group: Guest group Id, if the guests are group booking this ID is the same ID of the Group Leader's guest id.

Group Type: The group type selected from the dropdown list.

- Individual
- Group
- Corporation

Guest Qty: The number of guests included in this record.

Guest Type: The guest type selected from the dropdown list.

- Corporate
- Employee
- Guest
- Member

- Others
- Sponsor

Guest Status: Guest status selected from the dropdown list.

- Confirmed
- Attended
- Not attended
- Others

Charge: The total charged value for this record.

The following fields are related to payment and set by the system if the payment option is used.

Batch No: The batch number for the payment.

Receipt: The receipt number.

Pay status: The pay status i.e. Paid or Paid by Others.

Activity No: The activity no which was created for this guest record.

Remarks: Comments and remarks related to the guests.

The main guest record can belong to one or more of the following types:

Company	Click on Company Button
Employee	Click on Employee Button after entering the company
Contact	Click on Contact Button
Member	Click on Member Button

Depending on the data availability at the time of record creation, it can be accessed by any one of these types. System extends the information automatically. For example if the Contact finds the record and that contact is a member, the system automatically displays the membership details.

Company: Company Id of the quest record.

Co Name: Company name of the guest record.

Site: Site name for the quest record.

Contact: Contact Id of the guest records.

Employee: Employee name, if this record if for company event.

Member: The member rec Id for the individual member event.

Guest name: The name of the guest.

Guest Title: The title of the guest.

Address: Address of the guest.

Suburb: Suburb of the guest.

State: State of the guest.

Postcode: Postcode of the guest.

Country: country of the guest.

Notes: The notes and comments for the guest.

Private ph: Private phone number of the guest.

Private Fax: Fax number of the guest.

Mobile Ph: Mobile phone of the guest.

Business ph: Business phone number of the guest.

Business Fax: Business fax number of the guest.

Email: Email address of the guest.

Command Buttons

Guest Group
This button will activate guest group list.

Receipt
This button will activate receipt screen if available.

Company
This button will activate the company search engine to select the company.

Options
This button to attach event options to the event, i.e. restrictions, Diets etc.

Contact
This button will activate the contact search engine to select a contact.

Employee
This button will activate the company contact search engine to select a contact (employee).

Member
Will activate contact search engine to select a member.

New Guest
To create a new guest.

Delete Guest
To delete a guest.

Reset
To bail out of current changes and to reset the screen to he original status.

Save
Saves the screen information.

Add location
Click on this button to add a new event location (action) for the guest.

Delete Locations
Click on this button to remove an event location from the guest's attendance list.

Close
This button will close the add guest screen.

Help
This button will activate the help screen relevant to this section

How to produce invitations

Mail Desk produces Event invitations.

1. Create a new mail list record.
2. Select Event and if required an Event Split value from the dropdown lists.
3. Run the Mail List selection function for a standard mail or label merge function.
4. Be sure the <Update System> check box is checked so RSVP records are created in the activity management module.
5. Accept RSVP as detailed under the RSVP Maintenance section

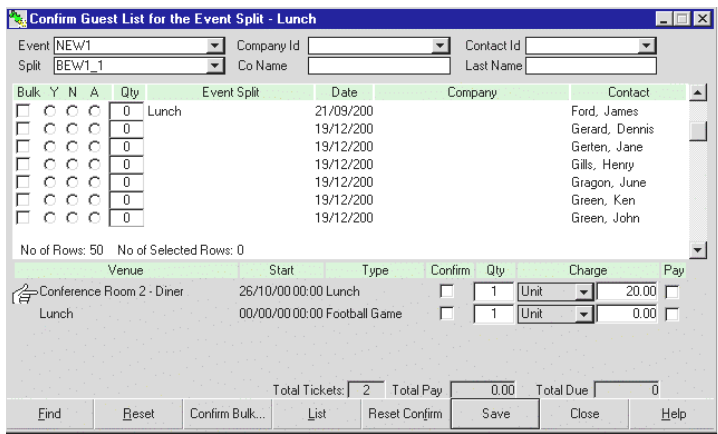
RSVP Maintenance

The RSVP Maintenance or the Confirm Guest List utility is accessed from two locations in Efficiency.

1. From the Event Module. Click on the <Confirm> button after locating an Event on the Event Management tab.
2. Click on the <EV> button on the Attachment section of the Activity List display windows.

There are three sections on this window.

1. Query Section. Allows the entering of the selection criteria for the display of the corresponding invitation list.
2. The middle section is the display area of the invited Company or Contacts.
3. The lower section is the list of the Event-Venue details for the selected event.



Query Fields

If the window was activated from the Event Management module with a selected event and split, these values will be locked in the query section.

Event: Event Id to find the lis selected from the dropdown list.

Split: Split Id for the guest list. If the dropdown list is used after selecting an Event, the list will be limited to those splits of the event. If no split was entered then the invitation list will be for the entire event.

Company Id: Company identification code.

Co name: Company name.

Contact Id: Contact Id.

Last Name: Contact's last name.

Once the selection values were entered in the query section click on the <Find> button to list the invitation list.

Invitation List Fields

The invitation list displays the invited but not processed (confirmed) company or contact records grouped by the event splits.

Bulk: Click on this check box if the Bulk Confirm option is to be used. Click and unclick this check box if you wish to reset the line to its original (blank) status.

Important: Only one line has to be entered with the bulk update options. Then click on the <Bulk Confirm> button to update all the records on the list with the selected options.

Y (Accepted): Click on this radio button if the invitation was accepted.

N (Not Accepted): Click on this radio button if the invitation was declined.

A (Apology): Click on this radio button if an apology was forwarded.

Only one radio button can be checked. The related values will be set in the Guest Venue section.

Qty: System will display one or zero as default and the value can be overwritten for the Accepted option.

Guest Venue Attendance Fields

This section of the window displays all the event venues and their set up values.

The selection options in the invitation list section will automatically set the required values in the following fields.

If a reset is required, click and unclick on the Bulk check box and repeat the further selection process again.

Confirm: If the guest is not attending this venue unclick the check box.

Qty: The quantity can be adjusted although the one and zero are defaults.

Charge: If the attendance to this venue event is chargeable select the option and accept or overwrite the entrance fee.

Pay: Click on this check box if the payment is to be entered after the guest record is being created. This option is valid only if the Event Management payment option was turned on.

Command Buttons

Find
To find the invitation list for the event.

Reset
To bail out and reset the screen to the original status.

Confirm Bulk
To confirm guest list in bulk. Only one invitation line and its venue options had to be selected as template information to update all the records on the invitation list.

List
To show the already confirmed guests list.

Reset Confirm
To bail out and reset confirm to the original status.

Save
To save the confirmation and create the guest and attendance record. System will display the Guest maintenance window automatically.

Close
To close the confirm screen.

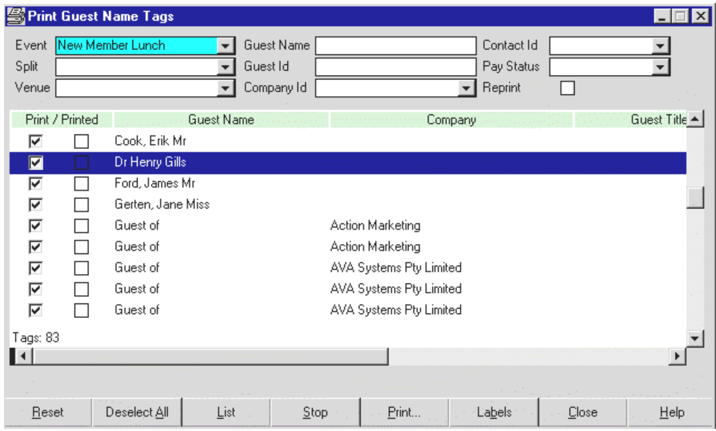
Help
To activate the help screen relevant to this section.

Print Guest Name Tags

This utility is used to select the guests for an Event or Event Split and print the nametags.

There are two sections on this window. At least the Event value must be entered in the query section in the top section.

The Reprint check box on the query section limits the list to the previously printed guest list.



Function Buttons

List
After entering the query options, click this button to produce the list. Unless the Reprint checklist is checked, all the guests to match the selection criteria will be displayed. The Print check box will be already checked and they can be unchecked for the corresponding tag no to print.

Select-Deselect All
Click on this button to select or deselect the print check box globally.

Print
Prints the hard copy of the list.

Labels
Click on this button to activate the Labels window to print the guest labels.

Event Pop Up Menu Options

From the Event Module the user may right mouse click in any grey area on any Tab to obtain a list of additional functions or enquiries available;

Select Defaults
Information as set up in the selected default will be updated into the current event record automatically during a new event record creation as detailed under the Module Defaults topic.

Attach Profiles
Each event record can have many profile items attached to it as described under Event Profiles topic.

Attach Transactions
Each event record can have many transactions attached to it as described under the Module Transactions

Record Expansions
Additional information can be created for each Event Record and accessed instantaneously as described under the Module Expansion topic.

Attach Pictures
Each event record can have pictures, documents, audio and video objects as

described under the Pictures topic.

Edit Remarks
Remarks attached to each Event Record can be edited, added or deleted as described under the Module Remarks topic.

Attach Notes
Unlimited number of secured, date time stamped and sorted notes can be attached to each Event Record as described under the Module Notes**Attach Yellow Sticky Notes**
Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each event record as described under the Yellow Sticky Notes topic.

Duplicate
An Event Record can be duplicated and another Event record created with the same or similar attributes as described generally under the Record Duplication topic.

Maintain User Flags
Up to 5 User Flags can be added to each Event record as generally described under the topic of User Flags Maintenance,

Email
This will activate the Email facilities. Refer to the Email topic for general information.

Dial
This will activate the auto dial facilities as described under the Autodial topic.

Print Sub Menu
The screen print or to print a pre-designated report can be processed here.

Print Current Data
Click on this to print the active data window. The Print Function details how to print and the available options.

Print Formatted Data
Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current contact record. The Print Function details how to print and the available options.

Edit Sub Menu
Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

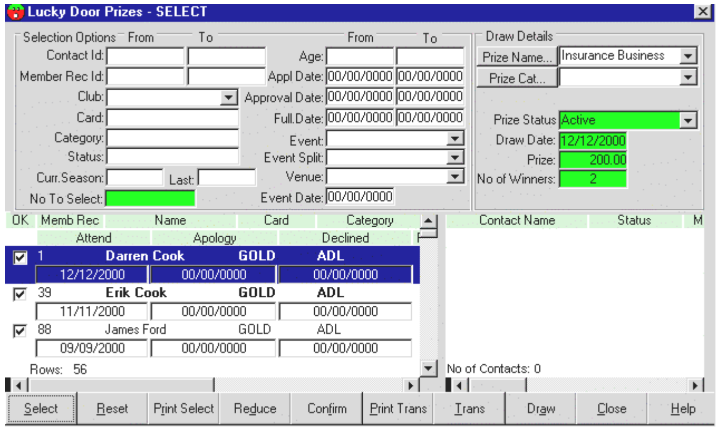
Statistics – Row Status and Row Count
Click on one of the above menu entires display the status of the record as described under the Statistics topic.

Link Host
Will create the Event on the integrated accounting system or edit the existing record.

Lucky Door Prizes

The Lucky Door Prize utility is designed to be able to select members to be placed into a prize draw, and to randomly select winners from the entrants in the draw.

This is accessed from the Event Management Module Prepare\Transaction Menu, by selecting the Lucky Door Prize option. A sample of the screen is displayed below.



How to Set Up Lucky Door Prizes

The Lucky Door Prizes utility is the extension of the Contact Transactions. The Prize Name, Category and Status values are set up in the Contact Transaction Codes.

The result of the draws is stored in the Contact Transactions Table itself.

Prize Type: Set the prize types in the Contact Transaction Type maintenance option.

Prize Category: Set the prize categories in the Contact Transaction Categorymaintenance option.

Prize Status: Set the prize status in the Contact Transaction Statusoption. Only the active status may be drawn. After the draw, the status will be closed. The status WINNER (ID of <W>) must also be created in this table

Selecting Members to place into the Draw

This screen is made of 4 parts:

- Top left part is to select membership record
- Top right part is to select the prize details
- Bottom left part is to list the members
- Bottom right section is to select the price winners.

The top left of the screen is used to make the selection criteria for the members to be eligible to enter the draw.

Make the appropriate selection then Press the <Select> button. The list of members will appear in the bottom left display.

To reduce the number of entrants, enter a value in the No To Select field and press the Reduce button.

The <Print Select> button will allow you to Print a listing of the members selected.

Enter the draw details (top right section of the screen) for the particular draw. These are set up in the Contact Module under Contact Transactions. Select the Prize status of Active.

The <Confirm> button will create transactions against the selected members with the values entered in Draw Details. The system will prompt you to save the transactions.

Making the Draw

Enter the details in the Draw Options for the draw you are about to perform. Press the <Trans> button to display the list of members in this particular draw.

The <Print Trans> button allows you to print a listing of the members in the draw.

Prior to pressing the <Draw> button ensure that

- The Prize Status is set to Winner
- The draw date is the actual draw date
- The Prize value and number of winners is filled in correctly.

The system will prompt you of this before making the draw.

Press <Yes> on the prompt to complete the draw. The system will randomly choose a winner from the list and change the status of the winners' transaction to 'W' and the status of all other entrants to 'C' for close.

You can print a listing of the winner(s) by pressing the <Print Trans> button with the appropriate draw details selected

Membership Special Events

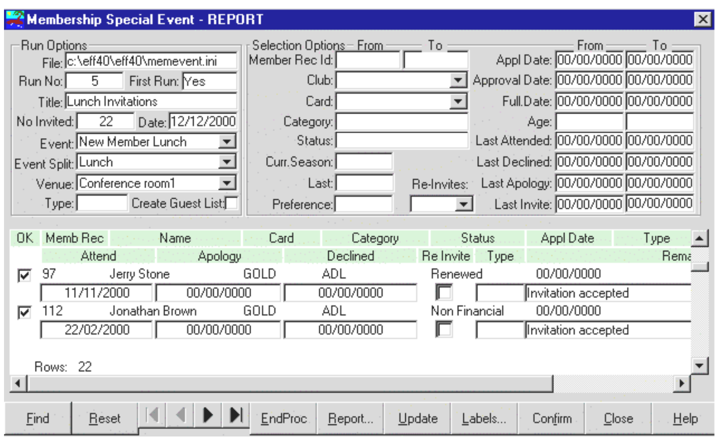
The Member Events Option is available from the Event/Transactions Menu. It is intended to provide a means to produce list and labels for special member events.

The Event, Event Split and the Event Venue records must be created before using this utility.

This utility will perform the following tasks.

- Creates an activity the using the RSVP activity default value from the User Options
- Updates the membership dates for the member's response.
- Creates the Guest List for the Event Venue.

The following window is typical



Creating Membership Events

Step 1

When creating a new event enter the following information.

File: The location of the memevent.ini file if it is not in the path

Run No: The event run number (Chosen by the user)

First Run: This must be set to Yes if this is a new event.

Title: The title of the event

No Invited: The number of people invited to the event

Date: The date of the event

Event: The Event this belongs to.

Event Split: The Event Split this belongs to.

Venue: The venue where the event is being held.

The Event, Event Split and Venue must have been created in the Event Management.

Type: The type of event. (Either M for Midweek or S for Saturday)

Guest List: This must be checked for the new list.

Make the necessary selection criteria on the right side to select members. The fields Category and Status are multiple entry fields where the ID's can be entered separated by commas, (i.e. to get status Financial and New, the Ids are entered as FIN, NEW)

Press the find button to display the results of your search. (Members must have the invite functions checked on to be invited otherwise they will not be selected)

Step 2

You now have the option of removing any persons from the list by deselecting them in the OK checkbox. At the same time, you may also enter comments in the remarks field for the remaining checked members. This will be recorded in the corresponding call transaction.

Report
This will print a report of all the checked members, as well as a separate page for the selection criteria.

Labels
This will print out mailing labels for all checked members. This label print screen has a save as option, allowing you to save the details to a text file if you require it for mail merge purposes.

Update
This will save the Event and selection criteria into the memevent.ini file for future use as well as create call transactions based on the call transaction default set in the eff.ini file.

You have now completed setting up an event and can exit the utility.

Confirming Attendees

Step 1

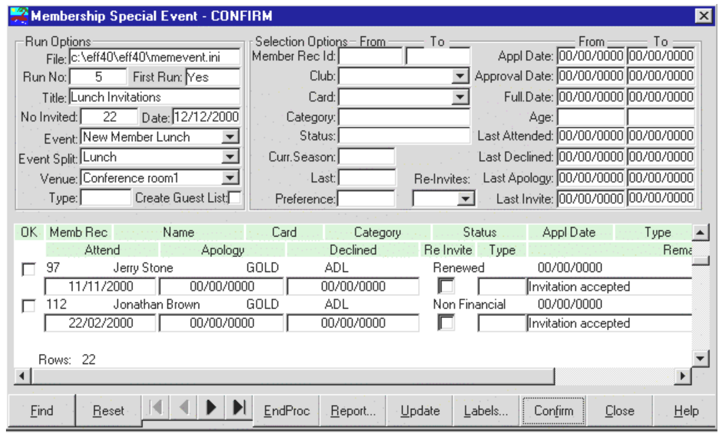
You can now call up this list at any time by starting the module and entering the run number into the Run No field. Press Tab to retrieve the saved selection criteria.

Tip: If you are confirming only a few records out of a large list you may choose to refine the selection criteria by searching with the memb_rec_id to find an individual record. Or retrieve the complete list and work from there.

Press the find button to retrieve your data.

Press the confirm button to go into confirmation mode.

You will be prompted that you are entering confirm mode. he window title bar will also display the word CONFIRM.



Step 2

To update any of the members listed you must place a check in the OK box. Leaving this box blank will not make any changes to this member and allow you to come back to them at a later stage.

To confirm acceptance, check the OK box. Then double click in the attend date field. This will insert the event date in this field and add ‘Invitation Accepted’ in the remarks field. It will also clear any dates in the apology or declined field.

To enter an apology, check the OK box and double click in the apology date field. This will enter today’s date and ‘Apology – Reinvite later’ in the remarks field. It will also clear any dates in the declined and apology fields.

To enter a declined, check the OK box and double click in the declined date field. This will enter today’s date and ‘Invitation Declined’ in the remarks field. It will also clear any dates in the accepted and apology fields.

In all of the above instances, you can add additional remarks, enter a Type value (i.e. S for Saturday or M for Midweek) or manually modify the dates.

You now have the option of printing the report, labels of all the people marked.

The <Update> button will Close the original call transaction record created during the invitation stage and create a new call transaction record based on the default set up in the eff.ini file with any remarks added in the remark field.

It will also update the member record with the Declined date, accepted date, apology date and Event Type where applicable.

You have now completed the confirmation process.

End of Process

The end of Process is to be used just before the actual event. It will close off any open call transactions.

Event Reports and Enquiries

Efficiency basic system is provided with various Event Management reports.

User can design any number of event management reports using the InfoMaker report writer. A blank report library named ‘EVENRPTS.PBL’ is provided under the ‘Reports’ subdirectory of each client. How to set up reports in InfoMaker is under the InfoMaker Reports Set Up topic.

Event Reports	**Report Group**	**Report Item**
	Event Reports:	Event Summary by Description
		Event Summary by Id
		Event Details by Description
		Event Details by Id
		Event By Type
		Event and Venue Options
		Event Guest List
		Event Venue Status
	Venue Reports:	Venue List by Buidling
		Venue List by Type