

SmartSeminars
User Guide

SmartOffice[®]



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Introduction

This document provides a brief overview of the SmartSeminars functionality, enabling new users to gain a basic understanding of the navigation, terminology, and logic of the module.

Overview

SmartSeminars provides the user with powerful and flexible seminar tracking features and is a dynamic module that interacts seamlessly with standard SmartOffice client management tools. Use SmartSeminars to track company seminars and to provide the highest level of coordination between all involved parties.

The key features include:

- Reports by Seminar and/or Events to evaluate progress
- Users are defined by their roles for each seminar
- List all tasks and responsibilities for a seminar
- Mass Correspondence can be sent to invited participants
- Maintain a master list of sites for seminars
- Schedule/Reschedule events
- Maintain seminar details (participants, users, dates, times, and events)
- List site details and information
- Track all seminars that contacts attend
- Lead/Opportunity generation
- Track contact acceptance or rejection of invitations
- Maintain Waiting Lists for seminars and events

Basic Usage

New Seminars can be easily added by clicking the **Add** button on the Seminar Summary record. The Seminar Event Description field provides a free-form field to describe the seminar and the User Summary section enables a user to add and define the role for each advisor (as Primary Responsible Person, Presenter, and Assistant). Use the Seminar Task Summary to list all the “To Do” items for a seminar and to set up notification of the event coordinator if any task falls behind schedule.

When a Seminar Tracking user is assigned a task, the user receives an alert at login. The Auto Send Letter Summary enables users to add a letter to a specific status and SmartOffice will automatically send that letter to any participants that match the status (e.g., Invitation Confirmed, Appointment Schedule).

Users can invite individual contacts to a seminar by clicking the **Invite Contacts** button. Once a list of contacts is identified for a seminar, an invitation is sent and the contact status changes accordingly. When a contact accepts or declines an invitation, users can change the status of the contact by selecting **Perform an Action on Current Contact** from the **Seminar Tracking** menu. Finally, if a contact attends a seminar, the outcome of the seminar is updated accordingly and appropriate action can be taken, including adding a contact to the Leads table.

System Administrators should refer to the Administrative Setup section of this document for details about initial configuration of this module before general advisor use.

Seminar Tracking Components

Seminar Tracking

Search Seminar
Search Site
Task List
Perform an Action on
Current Contact
Unfinished Tasks
Seminar Reports

- **Search Seminar** - Search for seminars and display the Seminar Summary.
- **Search Site** - Search for seminar sites and display the Site Information Summary.
- **Task List** - Display a list of tasks associated with seminars in the database.
- **Perform an Action on Current Contact** - Change the status of the current contact.
- **Unfinished Tasks** - Display a list of tasks that need to be completed.
- **Seminar Reports** - Display a list of statistical reports available for seminars and events.

Seminar Summary

The Seminar Summary lists seminars in the database based on the search criteria the user specifies. To view the Seminar Summary, from the menu, select **Seminar Tracking** to open an additional list of options and then select **Search Seminar** to open the Search Seminar dialog box. To select a specific seminar or type of seminar, select either the Seminar Name or the Campaign Name associated with the seminar and then click the **Search** button to open the Seminar Summary.

Seminar Summary

Include Inactive Seminars

Summary	Detail (P)	Seminar Events	All Invitees (R)	Custom
<input type="checkbox"/> Seminar Name ↑	Campaign	Seminar Type	Seminar Description	
<input type="checkbox"/> College Education Funding	Cross Sell - Annuity	Product Awareness	information on dealing with, and preparing for the ever rising cost of a college education. You will be presented with multiple strategies to prepare for this expensive necessity.	
<input type="checkbox"/> Disability Seminar		Training	Learn how to sell Disability to your prospects. Interact with Industry Leaders on their selling tips	
<input type="checkbox"/> Financial / Estate Planning	Financial / Estate Planning	Product Awareness	Latest information/news on Financial / Estate Planning, Product Literatures and Workshops	
<input type="checkbox"/> Life Plus		Training	Latest CRM Platform from all the industry leader Learn the how to use Internet for selling Hands on workshop	
<input type="checkbox"/> Retirement Planning	Retirement Planning (Business)	Product Awareness	Workshop to interact with Industrial Leaders, CEOs from Top Retirement speciality firms and Resource Center to purchase literature and materials	
Records Shown: 5 Total Records: 5				

All seminars that meet the criteria of the search are listed in the Seminar Summary. To view inactive seminars, select the **Include Inactive Seminars** option. From the Seminar Summary, a user can add, modify, or delete seminars. To access the other tabs on this record, select the option next to a seminar name and then click the respective tab.

Seminar Summary Buttons



- **Search** - This button is used to search and add records.
- **Add** - Click this button to add a new seminar to the database.
- **Delete Records** - Click this button to delete the selected seminar(s) from the database.
- **Mass Modify** - If the Active column is being displayed, tag the appropriate seminars and then select this button to change the Active status of all selected seminars.
- **Filter Records** - Click this button to specify filter options from the Seminar, Campaign, and User tables.
- **Unfilter Records** - When a view has already been filtered, click this button to clear the filter.

- **Print Spreadsheet** - Click this button to generate a PDF-based copy of this list.
- **Customize Layout** - Click this option to customize the layout of this section. The user can choose which columns to view, specify a width for each column, define sort order, set truncation, and subtotal user-specified columns.
- **Invite Contacts** - Tag a seminar and then click this button to search the database for contacts to invite to the selected seminar.
- **Participants Import** - Tag a seminar and then click this button to import a list of contacts to the invite list for the selected seminar. Users can import data in comma delimited text files (.csv). For more information, refer to the *Participants Import Button* section. Further information can also be found in SmartOffice's *Import/Export* documentation.
- **Tag All** option - Select this option to select all of the seminars listed in the Summary. Click this option again to clear the selection.

Seminar Details Tab

The Seminar Detail tab contains general information about the Seminar: the Seminar Event Description, a list of all tasks, the Seminar Type, Campaign Name, User Summary, and any Auto Send Letter. To open this tab, select a seminar and then click the **Detail** tab.

Basic Information Section

The Basic Information section contains general information regarding the seminar.

- **Seminar Name** - This field is for the name of the seminar.
- **Seminar Type** - This field displays the type of seminar. There are two system choices by default but more can be added by clicking the **C** (Customize) button.
- **Campaign Name** - If the seminar is part of a Marketing Campaign, click this field's hyperlinked title to select the appropriate campaign.
- **Active** - If the Active option is selected, the Seminar is considered active and will display on the Seminar Summary.
- **Created On** and **By** - These fields are read-only and are automatically populated.

Seminar Description Section

The Seminar Description section stores information about the seminar.

Seminar Task Summary Section

The Seminar Task Summary lists all seminar tasks with the users responsible for them.

Seminar Tasks Summary		
User Name	Task Type	Task Description
<input type="checkbox"/> Greg Laymen	Prepare Presentation	PowerPoint Presentation

Users Summary Section

The Users Summary section displays the various Responsible Users with their role for the seminar.

Users Summary	
User Name	User Type
<input type="checkbox"/> Michael L. Ashcroft	Staff
<input type="checkbox"/> Phillip Anderson	Producer/Manager

Auto Send Letter Summary Section

The Auto Send Letter Summary section lists the letters associated with each contact status (e.g., Appointment Requested, Appointment Scheduled, Call for an Appointment) for the seminar. When a contact is given a specified status, the appropriate letter will automatically be generated for mailing. The same status can be used for multiple letters.

Auto Send Letter Summary	
Status	Letter Title
<input type="checkbox"/> Registration Confirmed	Seminar Confirmation Letter
<input type="checkbox"/> Invitation Sent for Event	Seminar Invitation Letter
<input type="checkbox"/> Invitation Rejected for Seminar	Seminar Rejection Letter
<input type="checkbox"/> Event Not Attended	Event Not Attended Letter

Seminar Events Tab

The Seminar Events tab lists a variety of sub-tabs that contain display information about the currently selected seminar's events.

Seminar - College Education Funding											
Summary		Detail (P)		Seminar Events		All Invitees (R)		Custom			
Events Summary											
Summary		Detail (P)		Invitees		Registered		Event Attendees		Custom	
Site Name	City	Event Date	Registered Invitees	Waiting List	Max. Wait List	Capacity	End Time	Start Time			
<input type="checkbox"/> ABC Hotel	Pasadena	10/15/2005	6	0	10	125	08:30PM	01:00PM			
<input type="checkbox"/> New York Hotel	Glendale	12/14/2005	2	0	25	100	08:30PM	06:30PM			

Events Summary Sub-Tab

This sub-tab lists all of the events for the currently selected seminar. From this tab, events can be added, deleted, or selected together. The layout can also be customized to show details about the listed events.

Events Summary Sub-Tab Buttons

- **Add** - Click this button to add a new event to this seminar.
- **Delete Records** - Click this button to delete the selected seminar(s) from the database.
- **Customize Layout** - Click this option to customize the layout of this section. The user can select which columns to view, specify a width for each column, define sort order, set truncation, and subtotal user-specified columns.
- **Tag All** option: Click this option to select (tag) all the seminars listed in the summary.

Events Detail Sub-Tab

The Event Detail tab lists specific information regarding a Seminar Event. The Event Detail tab is opened by selecting an event from the Event Summary and then clicking the **Detail** tab.

Seminar - College Education Funding

Summary | Detail (P) | Seminar Events | All Invitees (R) | Custom

Event Detail - ABC Hotel

Summary | Detail (P) | Invitees | Registered | Event Attendees | Custom

Basic Information		Scheduling and Creation Details	
Seminar Name	College Education Funding	Event Date	10/15/2005
Event Name		Start Time	01:00PM End Time 08:30PM
Event Site	ABC Hotel	Created On	10/01/2002
Event Coordinator	Phillip Anderson	Created By	Phillip Anderson

Event Task Status Summary				Availability Information	
<input type="checkbox"/>	User Name	Due Date	Task Type	Max. Capacity	125
<input type="checkbox"/>	William Richards	10/11/2005	Arrange Hardware	Registered	6
<input type="checkbox"/>	Carl M. Mathews	09/06/2005	Print Materials	Event Attendees	0
<input type="checkbox"/>	Peter Stevens	09/07/2005	Print Brochures	Max. Wait List	10
				Waiting List	0
				Non-Attendees	0

Event Description

Basic Information Section

The Basic Information section has both read-only and hyperlinked fields. The Seminar Name field mirrors the same field on the Seminar Detail tab. Populate the Seminar Site and Event Coordinator fields by clicking the hyperlink and then selecting the appropriate site or user name.

Scheduling and Creation Details Section

In the Scheduling and Creation Details section, the Event Date, Start Time, and End Time are mandatory entry fields. The Created On and Created By fields are automatically populated.

Event Task Status Summary Section

The Event Task Status Summary section lists the users with assigned tasks for the event. SmartOffice populates the Event Task Status Summary section with information from the Seminar Detail tab. Change the status of a task by tagging it and then clicking the **Change Task Status** button to open the Change Task Status dialog box. Tasks can also be added and deleted from this section.

Availability Information Section

The Availability Information section contains details regarding the status of the event (e.g., Registered, Waiting List, Event Attendees).

Seminar Event Description Section

The Seminar Event Description section stores the information about the seminar event.

Invitees Sub-Tab

The Invitees sub-tab displays all of the contacts that have been invited to the selected event. Click the status of any contact to list all seminar-related details for the contact.

Seminar - Retirement Planning

Summary | Detail (P) | Seminar Events | All Invitees (R) | Custom

Invitees at A Resort/Lodge

Status: All

Summary | Detail (P) | Invitees | Registered | Event Attendees | Custom

Status	Contact Name ↑	Waiting List No.	Event Date	Start Time	End Time
Appointment Requested	Ackerman, Kathleen Middle		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Arreita, Fred T.		11/14/2006	11:00AM	01:00PM
Call for an Appointment	Ball, Jenny		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Banerjee, Soumyajeet J.		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Bartelo, Carl M.		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Bartelo, Fred		11/14/2006	11:00AM	01:00PM
Appointment Scheduled	Bartelo, Marisa		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Bartelo, Sarah W.		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Bartelo, Stanley		11/14/2006	11:00AM	01:00PM
Appointment Scheduled	Bayliss, Shruti		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Bronsten, Elaine		11/14/2006	11:00AM	01:00PM
Invitation Sent for Event	Christiansen, Ricky		11/14/2006	11:00AM	01:00PM
Attended - Not Interested	ZSQL4		11/14/2006	11:00AM	01:00PM

Records Shown: 15 Total Records: 15

Invitees Sub-Tab Buttons



- **Add New Invitee** - Click this button to add a new contact that does not exist in the database to invite to this event.
- **Delete Records** - Click this button to delete the selected record(s) from the database.
- **Add to Set** - Click this button to add the selected contacts to a set.
- **Filter Records** - Click this button to specify filter options from the Seminar, Campaign, and User tables.
- **Unfilter Records** - When a view has already been filtered, click this button to clear the filter.
- **Mass Correspondence** - Click this button to select a letter to send to all selected contacts.
- **Mass Activity Creation** - Click this button to create activities for all selected contacts.
- **Customize Layout** - Click this option to customize the layout of this section. The user can choose which columns to view, specify a width for each column, define sort order, set truncation, and subtotal user-specified columns.
- **Spreadsheet Export** - Click this button to export the current summary.
- **Perform an Action** - Change the status of the current contact. Select a Contact and then click the **Perform an Action** button to display the below option apart from the list of options described in the Event Attendees section.
- **Reschedule Invitation** - This option is only available if there is at least one more event. Select a contact with a status of either **Invitation Sent for Event** or **Registered Confirmed**, click the **Perform an Action** button, select **Reschedule Invitation**, and then click the **OK** button. A list of other events is displayed for selection. Once a selection is made, the contact will no longer display in the original event.
- **Registration Cancelled** - The contact is not coming to the event. If a contact status is **Waiting List** and the user selects the **Perform an Action** button, the only options are Reschedule Invitation, Contact Later, or Registration Cancelled.

- **Invite Contacts** - Tag a seminar and then click this button to search the database for contacts to invite to the selected event.
- **Tag All/Untag All** - Click this option to select (tag) all of the seminars listed in the summary.

Registered Sub-Tab

The Registered sub-tab displays all contacts that have registered to attend the event. The buttons on this tab are similar to the Invitees tab above with the following exception:

Attendee Report - Click this option to generate a report of the attendees for the current event.

Event Attendees Sub-Tab

The Event Attendees sub-tab displays all of the contacts that attended the selected event. From the **Status** drop-down, select one of the following options to list the contacts with the particular status:

- **Appointment Requested** - This option adds the contact to the Leads table. If the contact does not have a primary advisor, the contact is assigned to the Leads Coordinator for distribution.
- **Appointment Schedule** - After the contact attends an event, the Schedule Appointment or Schedule Call for an Appointment options are used to set a follow-up activity and prompt the opening of the Activity Detail Information dialog box. From the Invitees or Registered sub-tab, when performing a Schedule Appointment action for a contact with a Registered Confirmed status, the status is changed to Appointment Schedule.
- **Attended - Not Interested** - This option is for an event attendee that is not interested.
- **Call for an Appointment** – From the Invitees or Registered sub-tab, when performing a Schedule Call for an Appointment action for a Contact with a Registered Confirmed status, the Status is changed to Appointment Schedule.
- **Attended - Contact Later** - This option is for an event attendee that needs additional time to decide. The user is prompted to enter the date and time to check in with the contact. The user should select an Opportunity or Marketing Campaign to associate with the contact.
- **Event not Attended** - This option is for contacts that did not attend the event.
- **Event Attended** - This option is for contacts that attended the event.

These options are also available when the Perform an Action button is used from the Invitees tab.

All Invitees Tab

The All Invitees tab lists all of the contacts that have been invited to the selected seminar. All of the buttons available on this tab are explained in the *Seminar Summary* and *Invitees Sub-Tab* sections.

All Invitees - Retirement Planning

Status: + >>

Summary | Detail (P) | Seminar Events | All Invitees (R) | Custom

<input type="checkbox"/>	Contact Name	Status	Sub-Type	Event Date	Start Time	End Time
<input type="checkbox"/>	Baltar, Neil G	Event Not Attended		06/03/2006	05:30AM	07:30AM
<input type="checkbox"/>	Backer, Stephan	Appointment Requested		06/03/2006	05:30AM	07:30AM
<input type="checkbox"/>	Badinas, Samuel G	Attended - Contact Later		06/03/2006	05:30AM	07:30AM
<input type="checkbox"/>	Baker, Donald	Attended - Not Interested		06/03/2006	05:30AM	07:30AM
<input type="checkbox"/>	Baker, Rhonda M.	Call for an Appointment		06/03/2006	05:30AM	07:30AM
<input type="checkbox"/>	Baker, Robert	Registration Cancelled		06/03/2006	05:30AM	07:30AM
<input type="checkbox"/>	Ball, Jenny	Call for an Appointment		11/14/2006	11:00AM	01:00PM
<input type="checkbox"/>	Baltar, Rowena P	Contact Later				
<input type="checkbox"/>	Banerjee, Soumyajeet J.	Invitation Sent for Seminar	A			
<input type="checkbox"/>	Arreita, Fred T.	Invitation Sent for Seminar	A			
<input type="checkbox"/>	Bartelo, Carl M.	Invitation Sent for Seminar	A			
<input type="checkbox"/>	Bartelo, Stanley	Invitation Sent for Seminar	A			
<input type="checkbox"/>	Bartelo, Sarah W.	Invitation Sent for Seminar	A			
<input type="checkbox"/>	Bartelo, Fred	Invitation Sent for Seminar	B			
<input type="checkbox"/>	Christiansen, Ricky	Invitation Sent for Seminar	A			
<input type="checkbox"/>	Hadson, Daniel A.	Invitation Sent for Seminar	B			

Previous Page 1 Next Page Total Records: 51+ (Click here to list all)

Site Information Summary

To display this Summary, click **Search Site** and then click the **Search** button. The Site Information Summary lists all seminar sites tracked in the system.

Site Information Summary

Include Inactive Sites

Summary | Detail (P)

<input type="checkbox"/>	Site Name	Phone #	Max. Wait List	City	Capacity	Street	Description
<input type="checkbox"/>	ABC Hotel	626-555-1212	10	Pasadena	125	1361 Park Street	The outdoor garden is a great place to have lunch
<input type="checkbox"/>	A+ Resort/ Lodge	619-555-1212	25	San Diego	125		Located next the famous Parks of San Diego. Excellent place to have beach events
<input type="checkbox"/>	Winners Bay	800-555-1212	100	Las Vegas	500		There are 2 extra large swimming pools with extra large patio spaces for parties (after the evening events).
<input type="checkbox"/>	New York Hotel	818-555-1234	25	Glendale	100	645 West Capital Street	Famous art collection in the hotel. Outside garden (excellent for both lunch and dinner).
<input type="checkbox"/>	Boca Raton Inn	305-555-1212	10	Boca Raton	75		Great location to have a small meeting.
<input type="checkbox"/>	Dallas Connection Plaza	214-555-9900	5	Dallas	50		Ideal location to have a small event in the Midwest.
<input type="checkbox"/>	Asset Plaza	800-213-2132	25	Seattle	500		In front of the Water Front. Next to the Lake Augusta.

Records Shown: 7 Total Records: 7

Site Information Summary Buttons

- **Search** - Click this button to search for records.
- **Add** - Click this button to add a new seminar site to the database.
- **Delete Records** - Click this button to delete the selected site(s) from the database.
- **Filter Records** - Click this button to specify filter options from the Information about the Seminar table.
- **Unfilter Records** - When a view has already been filtered, click this button to clear the filter.
- **Print Spreadsheet** - Click this button to generate a PDF-based copy of this list.
- **Customize Layout** - Click this option to customize the layout of this section. The user can select which columns to view, specify a width for each column, define sort order, set truncation, and subtotal user-specified columns.
- **Tag All/Untag All** - Click this option to select (tag) all of the sites listed in the summary. Click this button again to clear the selection.

Task Summary

To display this Summary, click **Task List**. This list shows standard tasks that can be assigned for any seminar in the database.

Task Summary		+    
<input type="checkbox"/>	Task Type	Task Description
<input type="checkbox"/>	Prepare Presentation	PowerPoint Presentation
<input type="checkbox"/>	Mail Material	Compile attendees name and address
<input type="checkbox"/>	Arrange Hardware	2 Laptops 1 Overhead projector 1 Cordless Microphone
<input type="checkbox"/>	Mail Brochures	Compile attendees name and address
<input type="checkbox"/>	Place Preparation	Reserve 120 days prior to actual event
<input type="checkbox"/>	Print Brochures	Coordinate between vendor to print and graphic designer. Also closely work with business group to obtain the exact number of copies needed
<input type="checkbox"/>	Print Materials	Coordinate between vendor to print and graphic designer. Also closely work with business group to obtain the exact number of copies needed
<input type="checkbox"/>	Arrange Hardware	<P>2 Laptops, </P><P>1 Overhead projector</P><P>1 Cordless Microphone</P>
<input type="checkbox"/>	Arrange Hardware	2 Laptops, 1 Overhead projector, 1 Cordless Microphone</P>
<input type="checkbox"/>	Arrange Hardware	tests
Records Shown: 10		Total Records: 10

Task Summary Buttons

- **Add** - Click this button to add a new task to the list. If all standard task types have been used, the user is prompted to create a new type.
- **Delete Records** - Click this button to delete the selected task(s) from the database.
- **Filter Records** - Click this button to specify filter options from the Task table.
- **Unfilter Records** - When a view has already been filtered, click this button to clear the filter.
- **Print Spreadsheet** - Click this button to generate a PDF-based copy of this list.
- **Customize Layout** - Click this option to customize the layout of this section. The user can select which columns to view, specify a width for each column, define sort order, set truncation, and subtotal user-specified columns.

Perform an Action on the Current Contact

1. The Seminar Summary dialog box opens when a contact is in the context and the **Perform an Action on the Current Contact** side menu item is selected
2. Select the appropriate seminar and then click the **Invite to Seminar** button to invite the contact to the seminar. Alternatively, select an event from the Events Summary and then click the **Invite to Event** button to invite the contact to the event.
3. Follow the steps to complete the invitation.

Unfinished Task Summary

After all tasks have been assigned for an event, the Event Coordinator can view unfinished tasks by clicking **Seminar Tracking** and then selecting **Unfinished Tasks**. Unfinished Tasks for the current user (or all users for Event Coordinators) are displayed in the Unfinished Seminar Task Summary.

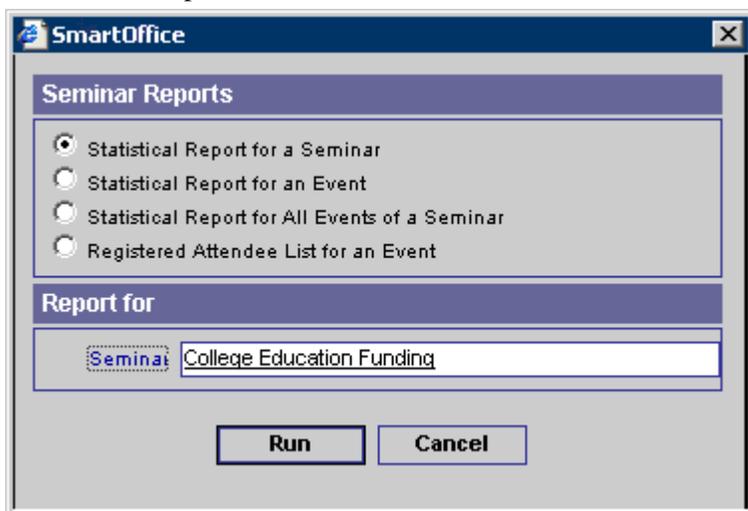


Unfinished Seminar Task Summary Buttons

- **Delete Records** - Click this button to delete the selected task(s) from the database.
- **Print Spreadsheet** - Click this button to generate a PDF-based copy of this list.
- **Customize Layout** - Click this option to customize the layout of this section. The user can select which columns to view, specify a width for each column, define sort order, set truncation, and subtotal user-specified columns.
- **Change a Task Status** - Click this button to change the status of a task. The options include Done, Not Done, In Progress, Delayed, and Delayed Done.
- **Tag All/Untag All** - Click this button to select (tag) all of the sites listed in the summary.

Seminar Reports

The Seminar Tracking module includes robust reporting functionality. To view the report options, click **Seminar Tracking** and then select **Seminar Reports** to open the Seminar Reports dialog box that lists the available reports.

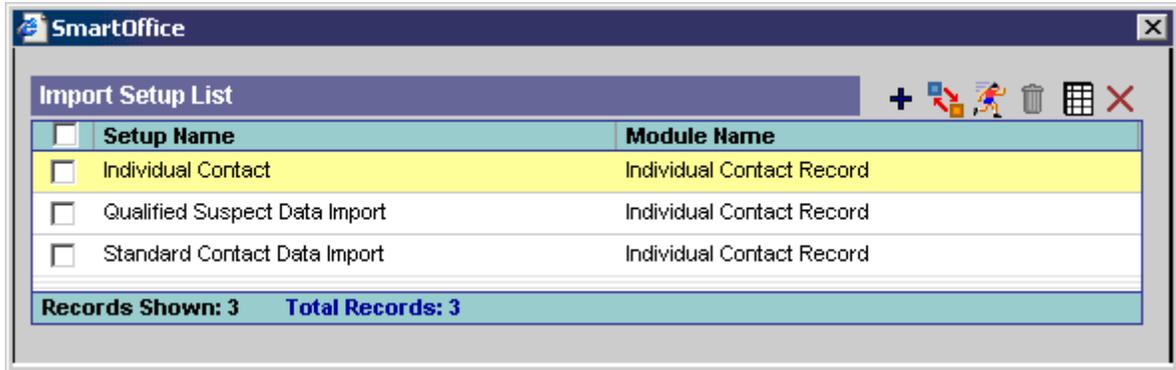


Participants Import Button

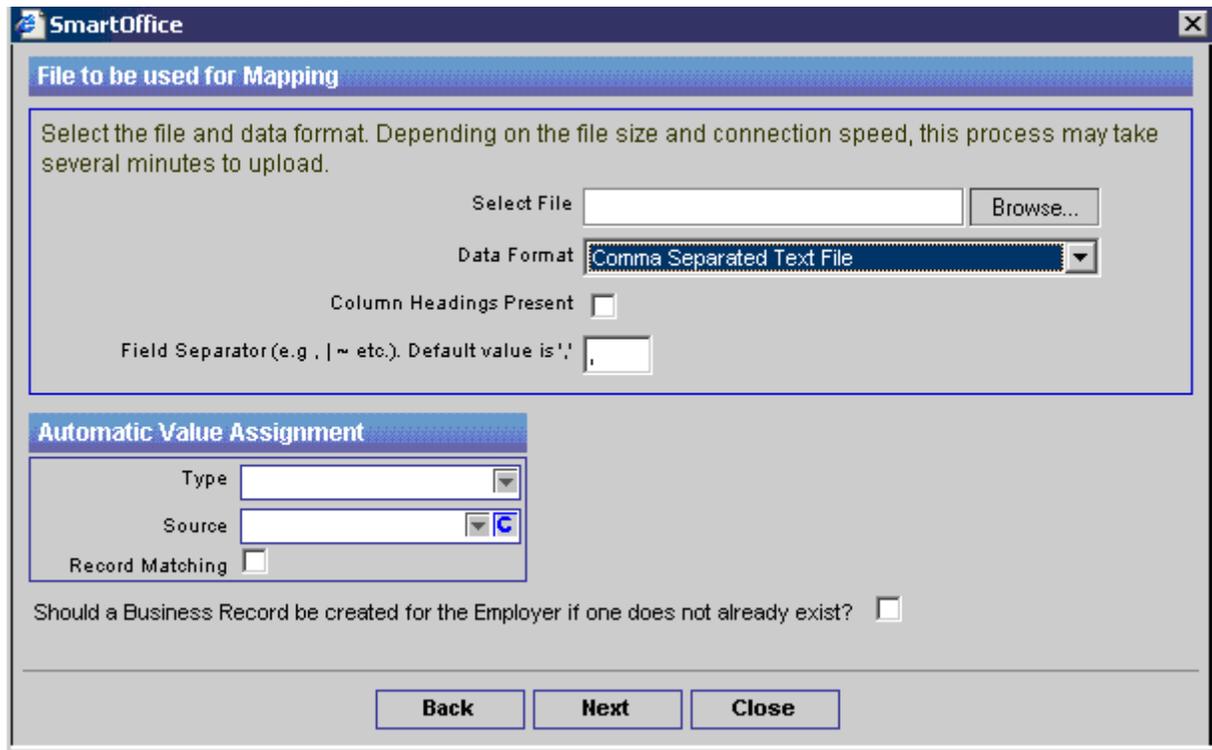
The Participants Import Button provides the user with the ability to import seminar participants from other sources using SmartOffice's Data Import Wizard. Users can import data in comma delimited text files (.CSV). For more information, see the *Import/Export* documentation.

A Setup is a type of participant import used in Seminar Tracking.

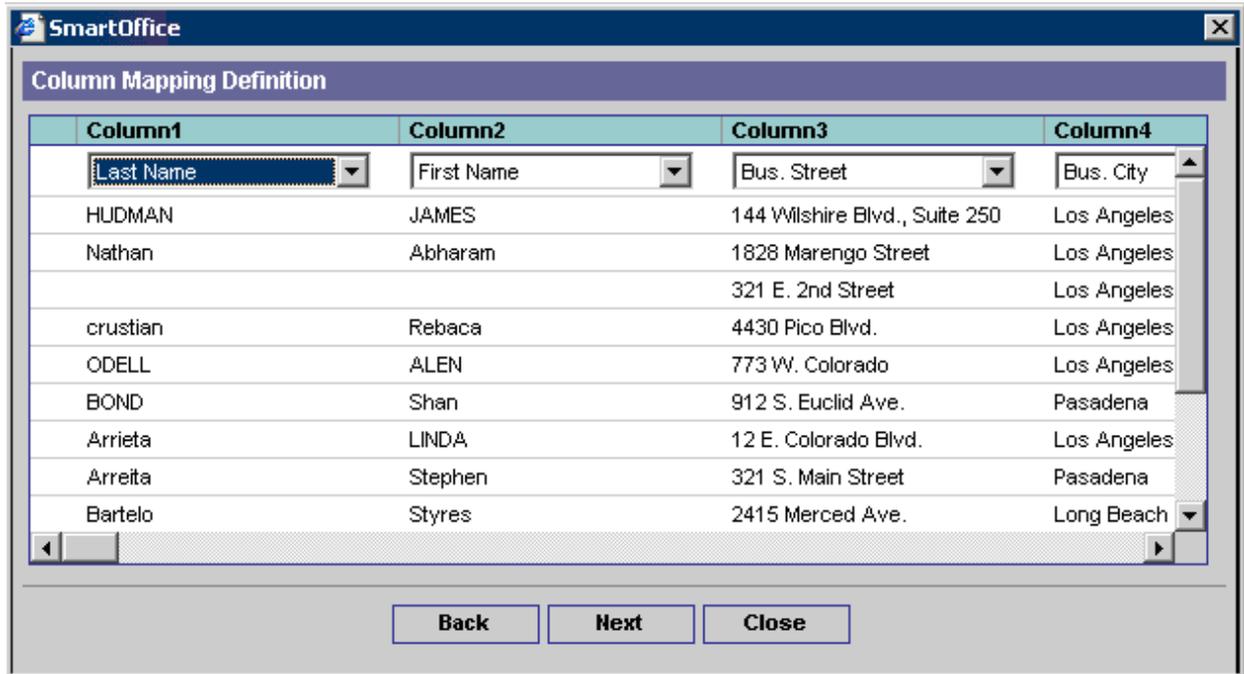
1. To add a new setup to the list of default setups, select the **Participants Import** button to open the Setup List and either select a type of import or click the **Add** button to open the File Upload dialog box.



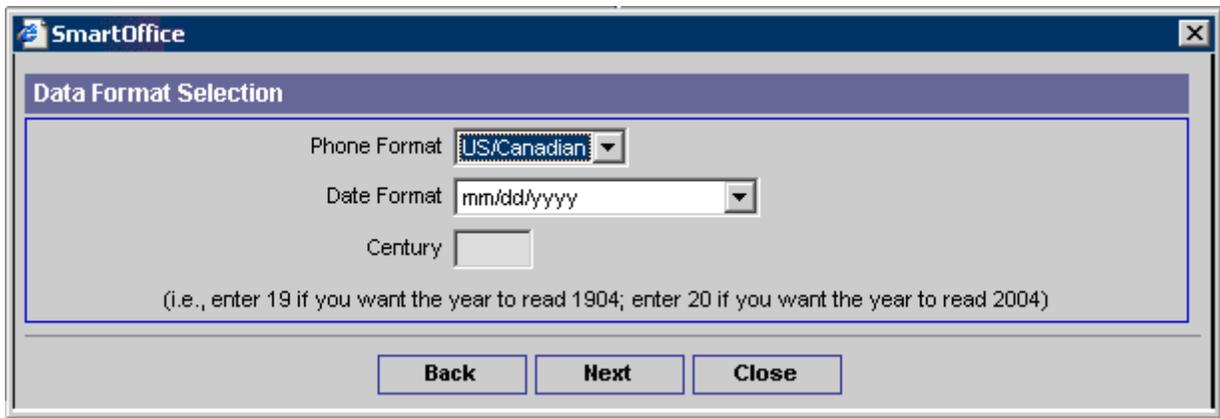
2. Locate the file, select the proper Data Format, and then click the **Next** button.



- In the Define Mapping Definition dialog box, the file is automatically mapped to appropriate fields in SmartOffice (e.g., Last Name, First Name, Business Address, etc.). After all the fields have been mapped appropriately, click the **Next** button.



- From the dialog box, select the data formats (e.g., Phone, Data, and Century) and then click the **Next** button.

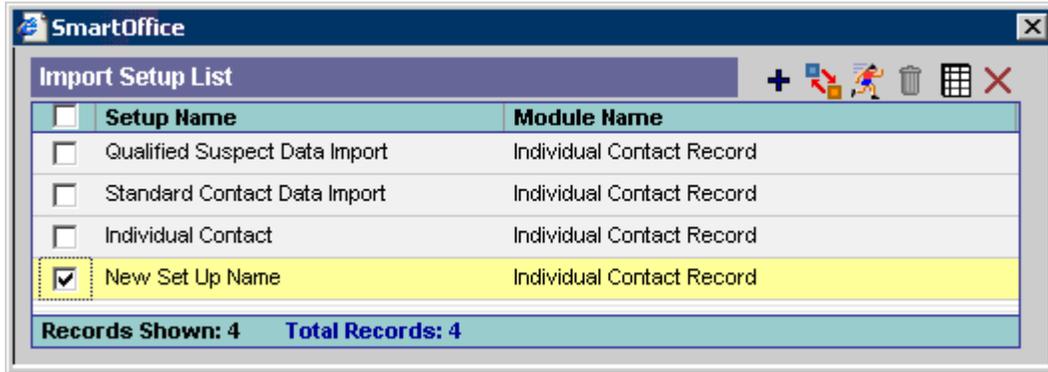


- After formatting the data, SmartOffice prompts the user to assign advisors to the contact records. The contact records can also be assigned by Type, Source, Record Matching, or to a Set. In addition, a section is available to create a Calendar Call Activity with a Reason for calling each contact record. A specific Word Track can also be assigned to the activity. Finally, the user can create a business record by clicking the appropriate option. Once all appropriate selections are made, click the **Next** button to continue.
- The next dialog box has a field for the Setup Name and three options: Save the Setup, Run (import the data but do not save) and Save and Run (save setup and import data). Enter the Setup Name, select the appropriate option, and then click the **Finish** button.
- The newly created Setup now displays in the Setup List.

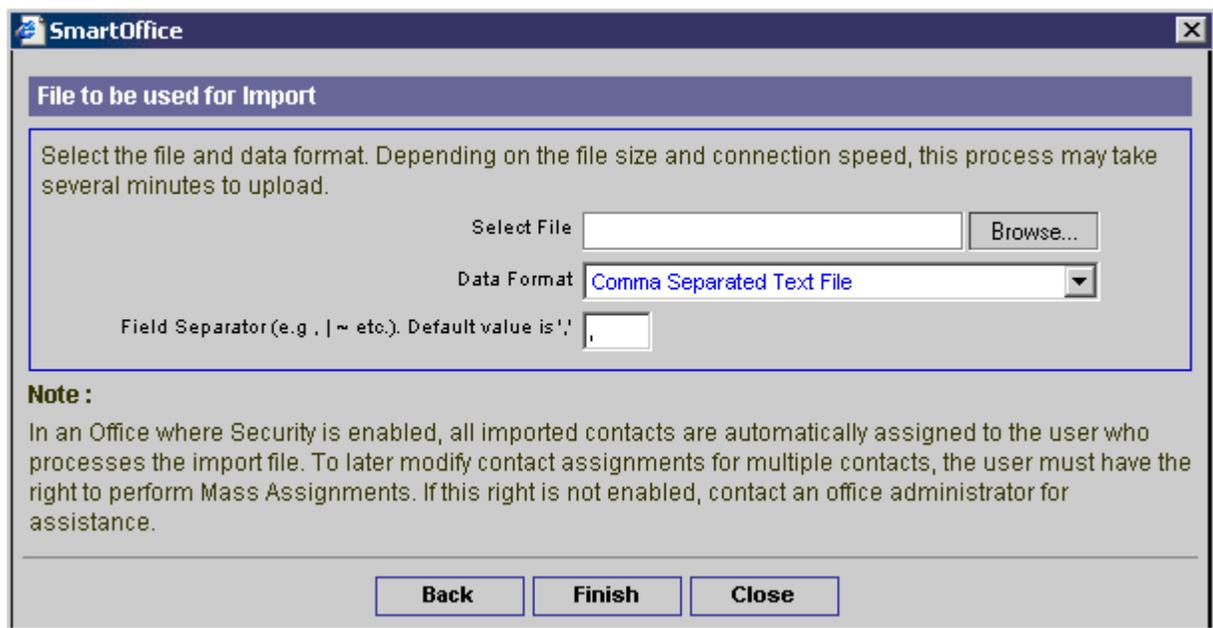
Run a Setup

Note: For more information on Import/Export features, see the *SmartOffice v5.1 Data Import and Data Export* user guides.

1. From the Seminar Summary, select a seminar and then click the **Participants Import** button to open the Setup List.
2. Select the appropriate Setup Name and then click the **Run Setup** button.



3. From the File Upload dialog box, click the **Browser** button to select the file. After successfully locating the file, select the proper Data Format and then click the **Next** button. If no other changes are required for the setup, click the **Finish** button to continue.



4. After formatting the data, SmartOffice prompts the user to assign advisors to the contact records. The contact records can also be assigned by Type, Source, Record Matching, or to a Set. In addition, a section is available to create a Calendar Call Activity with a Reason for calling each contact record. A specific Word Track can also be assigned to the activity. Finally, the user can create a business record by clicking the appropriate option. Once all appropriate selections are made, click the **Next** button to continue.

- When the import is complete, the Import Completed Successfully dialog box is displayed with the number of records imported. Click the **Close** button to close the dialog box. If a letter was already specified in the Auto Send Letter Summary, it will be sent to the imported participants. If no letter is specified, the Letter Search dialog box opens and the user can follow the prompts to prepare letters for mailing.



Administrative Setup

Before adding seminars, E-Z Data, Inc. recommends configuring the following administrative settings:

- Create all Sites and Tasks to be used by company advisors and identify all responsible users.
- Create and identify any sets, filters, and Marketing Campaigns to be used with Seminar Tracking.
- Create the appropriate letters for the different types of contact seminar statuses.

Add a Seminar Site

- To add a Seminar Site, from the side menu, click **Seminar Tracking** and then select **Search Site** to open the Search Site dialog box.
- Click the **Search** button to open the Site Information Summary.

Site Information Summary

Include Inactive Sites

Summary | Detail (P)

<input type="checkbox"/>	Site Name	Phone #	Max. Wait List	City	Capacity	Street	Description
<input type="checkbox"/>	ABC Hotel	626-555-1212	10	Pasadena	125	1361 Park Street	The outdoor garden is a great place to have lunch
<input type="checkbox"/>	A+ Resort/ Lodge	619-555-1212	25	San Diego	125		Located next the famous Parks of San Diego. Excellent place to have beach events
<input type="checkbox"/>	Winners Bay	800-555-1212	100	Las Vegas	500		There are 2 extra large swimming pools with extra large patio spaces for parties (after the evening events).
<input type="checkbox"/>	New York Hotel	818-555-1234	25	Glendale	100	645 West Capital Street	Famous art collection in the hotel. Outside garden (excellent for both lunch and dinner).
<input type="checkbox"/>	Boca Raton Inn	305-555-1212	10	Boca Raton	75		Great location to have a small meeting.
<input type="checkbox"/>	Dallas Connection Plaza	214-555-9900	5	Dallas	50		Ideal location to have a small event in the Midwest.
<input type="checkbox"/>	Asset Plaza	800-213-2132	25	Seattle	500		In front of the Water Front. Next to the Lake Augusta.

Records Shown: 7 Total Records: 7

- Click the **Add** button to open the Site Information Detail tab.

- Enter the site information. The mandatory fields are Site Name, Street Line 1, and Max. Capacity. Once all the necessary information has been entered, click the **Save** button.

Site Information Detail

Summary | Detail (P)

Site Information Detail		Site Information Detail					
Site Name	A+ Resort/ Lodge	Phone #	619-555-1212				
Street Line1		Fax #					
Line2		Max. Capacity	125				
City	San Diego	Max. Waiting List	25				
State	CA	<input checked="" type="checkbox"/> Active					
ZIP Code	92993						
Driving Directions		Contact Information for the Site					
111 North Lane Beach Drive (in San Diego). 5 South exit on Balboa Drive (right turn). Next to the park.		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #4F81BD; color: white;">Remarks</th> <th style="background-color: #4F81BD; color: white;">Primary Contact</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>		Remarks	Primary Contact		
Remarks	Primary Contact						
Available Infrastructure		Description					
25 Rooms (Reserved) Font 5 Suites (Reserved) 2 Conference Halls (Reserved)		Located next the famous Parks of San Diego. Excellent place to have beach events					

Add a Task

- To add a task, from the side menu, click **Seminar Tracking** to open an additional list of options.
- Select **Task List** to open the Task Summary list.

Task Summary

Task Type	Task Description
<input type="checkbox"/> Prepare Presentation	PowerPoint Presentation
<input type="checkbox"/> Mail Material	Compile attendees name and address
<input type="checkbox"/> Arrange Hardware	2 Laptops 1 Overhead projector 1 Cordless Microphone
<input type="checkbox"/> Print Brochures	Coordinate between vendor to print and graphic designer. Also closely work with business group to obtain the exact number of copies needed
<input type="checkbox"/> Print Materials	Coordinate between vendor to print and graphic designer. Also closely work with business group to obtain the exact number of copies needed
<input type="checkbox"/> Arrange Hardware	2 Laptops, 1 Overhead projector, 1 Cordless Microphone</P>

Records Shown: 6 Total Records: 6

- Click the **Add** button to open the Task Detail dialog box. If all system tasks are in use, a dialog box will alert the user. Click the **OK** button to close the dialog box.



- From the Task Detail dialog box, select the Task Type from the drop-down list, enter a Task Description, and then click the **OK** button to save the information to the Task Summary list.
- To add a new Task Type, click the **C** button at the end of the Task Type field to access the customization choices.
- When the Choice Customization dialog box displays, in the Enter Choice Value section, enter the title of the new choice and then click the **Add** button.
- The new choice is now listed in the Custom Choices section. Click the **OK** button to open the Task Detail dialog box.

8. The new option is listed in the Task Type drop-down field. The Task Description field is required before saving. After entering a description, click the **OK** button to send the task to the Task Summary.

Task Summary



Summary	
Task Type	Task Description
<input type="checkbox"/> Prepare Presentation	PowerPoint Presentation
<input type="checkbox"/> Mail Material	Compile attendees name and address
<input type="checkbox"/> Arrange Hardware	2 Laptops 1 Overhead projector 1 Cordless Microphone
<input type="checkbox"/> Mail Brochures	Compile attendees name and address
<input type="checkbox"/> Place Preparation	Reserve 120 days prior to actual event
<input type="checkbox"/> Print Brochures	Coordinate between vendor to print and graphic designer. Also closely work with business group to obtain the exact number of copies needed
<input type="checkbox"/> Print Materials	Coordinate between vendor to print and graphic designer. Also closely work with business group to obtain the exact number of copies needed
<input type="checkbox"/> Purchaser	Coordinator between vendor and event sites

Records Shown: 8 Total Records: 8