

Seminar Pro: Main Screen

Open file
Create a new database or connect to an existing one

Switch view list or detail

Add or delete a record

Edit or save a record

Search records
Click for search options

Navigation panel
Create tags here, to attribute to your records.
Click on a tag to show all linked records.
Right-Click to add, delete or rename tags.

Linked tags panel
Black color indicates a tag attributed to the selected record.
Red tags are not linked to the selected record(s)
Right-Click for a context menu.

Databox
Main area for editing and displaying records
Click onto any field to start editing a record.

Linkbox
This is the applications clipboard.
Drag tags, records from databox or from linked data panel here, for quickly accessing them later, or for drag and link them to other records.
Activate the checkbox to keep a record in the linkbox, also after quitting the app.

Linked data panel
Displays a list of records linked to one or several selected records in the databox.
A green light indicates that linked records are available.
A gray light means: no linked records.
Yellow indicates an indeterminate state, when records cannot be displayed.

Editing Records

The screenshot shows the Seminar Pro application in edit mode for a user record. The main window displays a form with the following fields:

- Nickname: Oliver
- Company: Fondation Rabten
- Gender: Herr
- Title: (empty)
- Firstname: Oliver
- Lastname: Osswald
- Address: Route de Praz-Valey 4
- Zip: 1801
- City: Le Mont-Pèlerin
- Region: (empty)
- Country: CH
- Language: D
- Birthdate: (empty)
- Active: Active

Additional fields include Email (admin@rabten.ch), Phone Direct (044 586 22 68), Phone Mobile (076 210 50 00), Phone Work, Phone Home (021 534 68 59), Fax, Web (www.seminar.pro), Label (Fondation Rabten), Letter (Herr Oliver Osswald), Salutation (Lieber Oliver), and Remark.

The toolbar at the top contains icons for Open, Action, Print, Script, Panel View, View Selection, Detail List, Insert, Delete, Cancel, Save, Clear, Link, and Linkbox. The sidebar on the left shows a tree view of the database structure, including 01 ASSOCIATION, 02 MAILINGS, 03 USER, 04 SERVICE FIRMS, and 05 BOUTIQUE.

At the bottom, there is a table showing linked addresses:

LINKED ADDRESSES	LINKED EVENTS	LINKED INFO
Gender: Herr	Firstname: Elmar	Name: Osswald
Gender: Frau	Firstname: Eva	Name: Osswald-Sulser

To add a new record

Click on the + sign on the toolbar

To delete a selected record

Click on the – sign on the toolbar

To edit an existing record

Click directly onto a field or click on the pencil on the toolbar

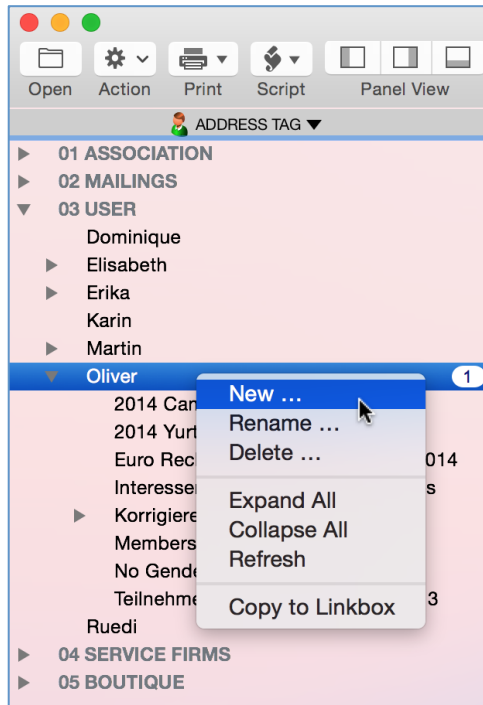
To save a new or updated record

Hit the Cmd+S keys, or click on the save icon on the toolbar, or choose menu Edit->Save

Note:

While in edit-mode, you cannot drag any data from or to the (grayed-out) panels.

Adding new tags



Tags are used to organize your records.

You drag a tag onto a record (or vice-versa) and then you can select all linked records by selecting a tag in the navigation panel.

To add a new tag:

- 1.) Right-click onto an existing tag
or
Right-click on empty space within the navigation panel.
- 2.) Select "New" from the context-menu

Tip: Right-click onto an existing record, to add a **new tag as a child** of it.

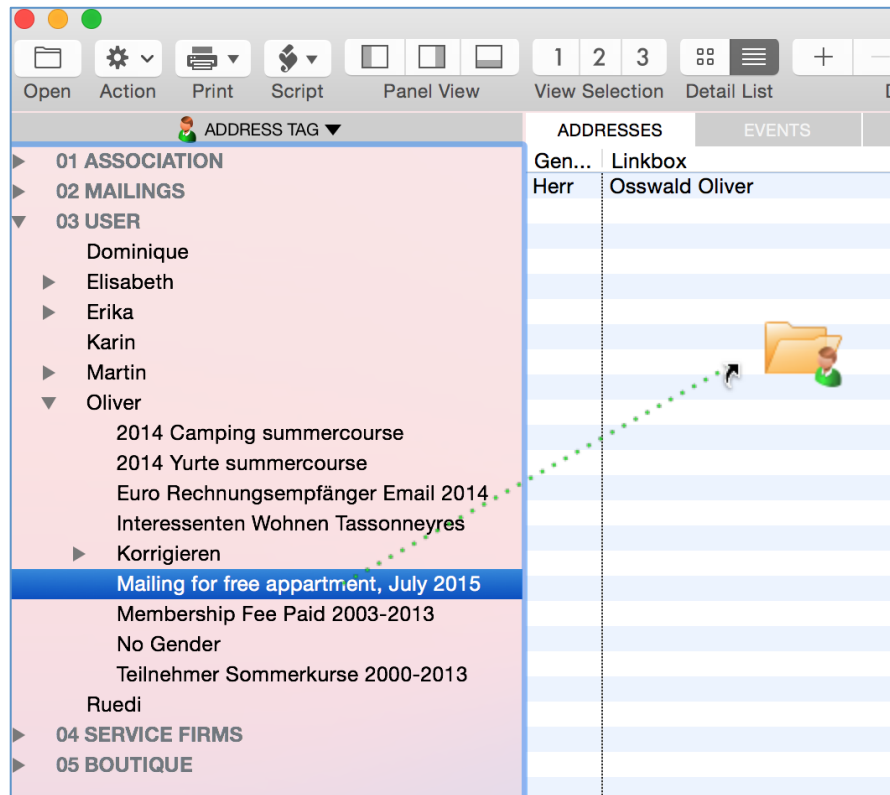
 A dialog box titled 'Add Tag' with a light gray background. It contains the following elements:

- 'Parent Tag:' followed by the text 'Oliver'.
- 'New Tag:' followed by a text input field containing 'Mailing for free apartment, July 2015'.
- A checked checkbox labeled 'Add as child'.
- Two buttons at the bottom: 'Add' on the left and 'Cancel' on the right.

Un-select "Add as child" if you want to add a new top-level tag to the navigation panel.

Tip: Drag a tag from the navigation panel to the linkbox, if you wish to use it frequently.

How to tag a record



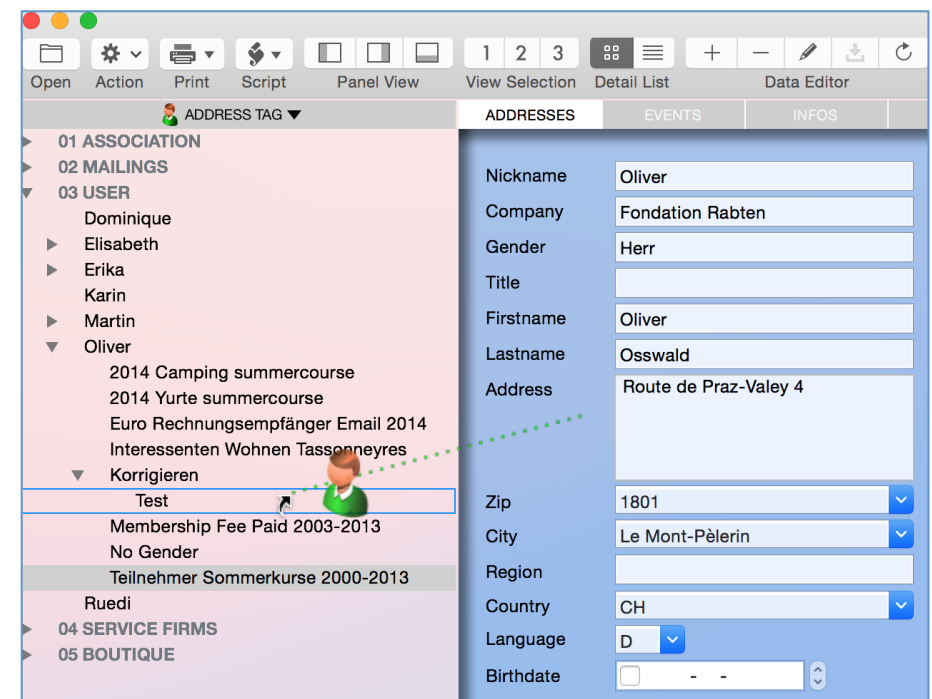
Click and drag a tag from the navigation panel to the databox.

The tag will be linked to the **selected records of a list**, or to all records when there is no selection at all.

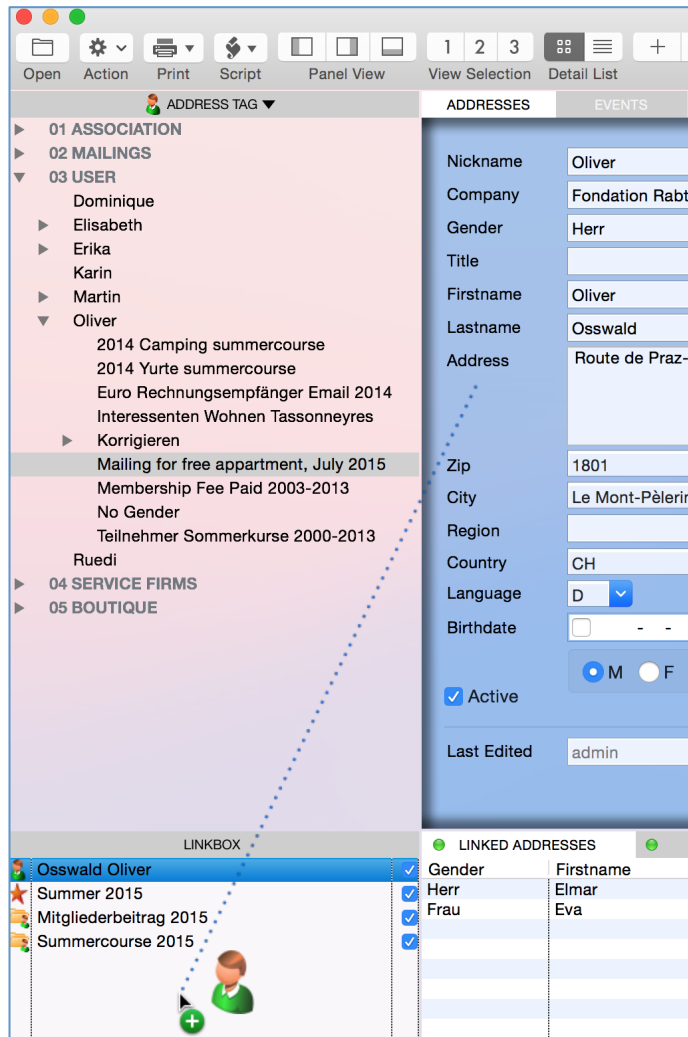
In **detail-view** only the displayed record will be linked

You can also **drag a record from databox to a tag** in the navigation-panel.

Start dragging from the (blue) **background** of the databox.



Adding data to the linkbox



Records which are frequently used, can be dragged to the linkbox.

Click on the icon of a record in the linkbox, to open it in the registration window with all linked records.

Tip: Drag a seminar record to the linkbox and **activate the checkbox** to keep it there. This is a shortcut for quick-access to seminars and other records.

Tip: Click on the icon of a seminar in the linkbox (a star indicates a seminar) and you will see all its registrations.

Tip: Double-click on the title of a seminar in the linkbox and it will be loaded with all its details into the databox.

Note: You can drag tags from the navigation panel or linked records from the linked data panel below of the databox.

Register seminar participants

In order to register persons with seminars, you select **menu Edit->Register** (or hit the **⌘+R** keys) or you click on the **Link button** of the toolbar.

Select the ordered items to calculate and generate the invoice text

Item	EUR	CHF	Or...	%	VAT
fee standard	340.00	375.00	<input type="checkbox"/>	0.0	
fee member	295.00	325.00	<input checked="" type="checkbox"/>	0.0	0.00
fee student	250.00	275.00	<input type="checkbox"/>	0.0	

breakfast	50.00	56.00	<input type="checkbox"/>	5.2	
lunch	100.00	112.00	<input checked="" type="checkbox"/>	5.2	5.80
dinner	60.00	70.00	<input checked="" type="checkbox"/>	5.2	3.60

tent	45.00	50.00	<input type="checkbox"/>	2.1	
yurt	95.00	105.00	<input type="checkbox"/>	2.1	
dormitory	160.00	175.00	<input type="checkbox"/>	2.1	

If any special charges or discounts apply, then add them here. Click on the CALCULATE button to recalculate the invoice.

Status: Confirmed
 Charges: 0.00 VAT 0.0
 Discount: absolute 0.00, percent % 50.00
 Pensionist, ohne Frühstück
 Group: number of persons 1
 CALCULATE CHF 248.50

FROM DATABASE : EVENT
 Summer 2015

FROM LINKBOX : ADDRESSES

- Luyet-Cauvin Chantal
- Macaet Sanda
- Marillier Olivier
- Marin Lavinia
- Minerva Lau
- Morath Marlène
- Neuber Kerstin
- Osswald Oliver
- Paidoussi Michoud Vassiliki
- Panglung Yangdol
- Patrascan Radu
- Pegart Martine
- Piza Adriana
- Plass Gerit
- Pola Carmen
- Prins Johannes
- Puentes Esther Cristina
- Ramcharan Maaltie
- Ramos da Silva Daniel
- Repar Dragutin
- Riehl Pascale
- Ritschard Beat
- Rosioru Otilia

Note: When you click on the star icon of a seminar, saved in the linkbox, then the seminar will be loaded here with all its registered participants in the list below.

Select a record in the lower list to show all details of its registration

INVOICE ITEMS	INVOICE TEXT	PAYMENT	PRIVATE COMMENT	FILES	Total	%	VAT
	Item	Units	Price				
	Kursbeitrag Vereinsmitglied Rabten Choeling	1	325.00		325.00	0.0	0.00
	Mittagessen	1	112.00		112.00	5.2	5.80
	Abendessen	1	70.00		70.00	5.2	3.60
	50% Discount : Pensionist, ohne Frühstück	1			-253.50		
	Erhaltene Zahlungen				-5.00		

	MwSt						9.40

	TOTAL CHF (MwSt inkl.)				248.50		

BASE PRICE EUR 455.00 CHF 507.00 MwSt 9.40
 Last Edit oliver 2015-05-18 15:54:52
 CREATE PDF Invoice with slip in CHF

Do not forget to SAVE your edits

Select the type of document to be generated and the click the CREATE button

Hit the + sign to search record
 Click on the - sign to remove entries from the list of found records.
 Click on the action wheel to clear the list completely

Displaying address details during a registration

The screenshot shows a list of participants on the left, each with a small icon and a checkmark in a blue box. The list includes: Leal Puentes Natalia, Liem In, Luyet-Cauvin Chantal, Macaet Sanda, Marillier Olivier (highlighted in blue), Marin Lavinia, Minerva Lau, and Morath Marlène. A callout box on the right displays the details for Olivier Marillier: Monsieur Olivier Marillier, Rue Pierre-à-Mazel 4, CH 2000 Neuchatel, and Mitgliederbeitrag 2015.

In the registration (link) window, click an icon of an address to see detail information.

Adding individual text to an invoice /(confirmation letter

INVOICE ITEMS	INVOICE TEXT	PAYMENT	PRIVATE COMMENT	FILES
Additional text to be printed on invoice				
Invoice No	2015-67	As you wished, we could reserve the same room you had already last year		
Inv. Date	2015-05-18			
Inv. Amount	5.00			
ISR Code	010000005007>967966900000143600000009540+ 010357828>			
ISR Ref	967966900000143600000009540			

Select the INVOICE TEXT tab, if you wish to **add some individual text to an invoice.**

For instance if you have some special arrangements for a participant, you can add a confirmation note here.

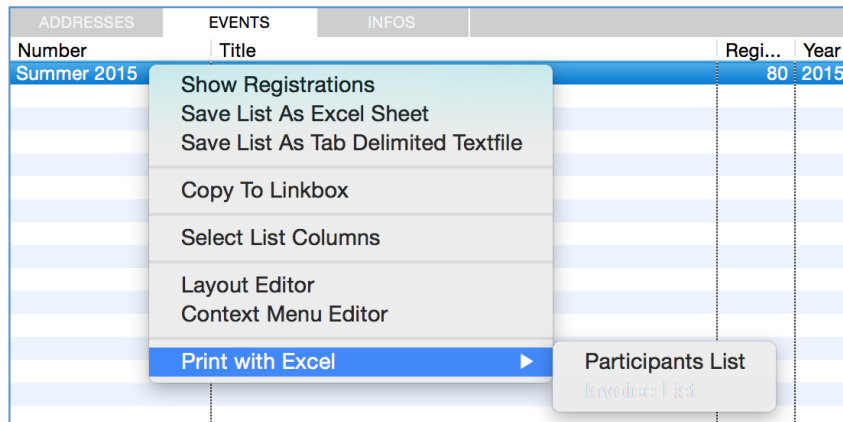
Keep track of payments

INVOICE ITEMS	INVOICE TEXT	PAYMENT	PRIVATE COMMENT	FILES
Last payment		Date	Type	Amount
PayPal		2015-05-18	PayPal	5.00
Payment Date	<input checked="" type="checkbox"/> 2015-05-18			
Paid Amount	5.00			
ADD PAYMENT				
Paid Euro	0.00			
Paid Total CHF	5.00	Recalculate	Delete	

Select the PAYMENT tab to **register payments** of a participant. Under Last payment, you add a title or the way the payment was made, the payment date and the amount paid. Then you click on the ADD PAYMENT button.

Select a payment in the list and click on the REMOVE button, if you wish to delete that payment. Click on Recalculate after this.

Print a participants list



Select a seminar in the databox and from the context menu (right-click on the record) you chose: Print with Excel -> Invoice List

Print a seminar invoice / confirmation with Word

We select an existing registration in the link window:

1. Search and select an address
2. Hit Cmd + L (Menu Edit -> Show Registrations)
3. Select a seminar from the booked seminar list
4. Click the button CREATE and select "Word Invoice"
1. If asked "Do you wish to create a new invoice" then chose: "Use Existing"

