Book'em! 4.0 QuickStart

Book'em! runs on Windows and Macintosh computers with an identical feature set. This guide covers both versions, and both platforms are represented in the illustrations.

Installation and Log-In

Windows

If you have the CD-ROM, open the CD-ROM drive through My Computer. Open the appropriate folder (Single User or Client_Server) and double-click the installer.

If you downloaded a demo from the internet, simply double-click the .EXE.

It is recommended that files be installed to the default location selected by the Installer, so that upgrades done later will work easily.

Macintosh

If you have the CD-ROM, open the appropriate folder (Single User or Client_Server) and double-click the installer.

If you downloaded a demo from the internet, simply double-click the installer.

It is recommended that files be installed to the default location selected by the Installer, so that upgrades done later will work easily.

Client-Server

Besides the Book'em! CD-ROM disk, you also received a 4D Server CD-ROM from 4D, Inc. Do not install from the 4D Server disk! A correctly configured version of 4D Server and 4D Client is installed by the Book'em! disk.

You will need to enter the 4D Server serial number from the card you received from 4D, Inc. the first time you start 4D Server. If you have purchased more than 2 user licenses, you may obtain expansion pack serial numbers from 4D's website. Go to http://www.4d.com/support/registration/Regform.html to register your Server license and obtain expansion serial numbers.

Starting the Program

On Macintosh, just double-click Book'em! (or 4D Client). If you like, create an alias for the desktop or Apple Menu, but don't move the actual file out of the Book'em! folder.

On Windows, open it from the Programs section of the Start Menu or the shortcut on the desktop.

With all versions and on all computers, the Book'em! folder must remain intact -- don't move files out.

Log-In

To enter the database, select the user name, enter the password, and click OK.

The demo datafile has 2 sample users entered.

Dave has no password. Just select and click OK, or double-click the name.

Administrator has the password admin. The administrator has some extra privileges, such as the ability to add users, set system preferences, run a full data dump, rebuild indexes, etc.

When you create your real datafile you may create the users you need. See "Administration" on page 2

The Demo Datafile

Book'em! comes with some sample data: phony events, customers, staff, etc. Use this demo data to experiment and learn the program. Test different strategies of organizing your events. Since it will all be deleted anyway, this is the time to make mistakes.

One of the sample events of the Introductory Class type and one River Trip contains several reservations. Start exploring with either of these.

When a recurring master is clicked, only future events are shown. Control-clicking (Windows) or command-clicking (Mac) displays events of the past 30 days. Control-alt-clicking (Windows) or command-option-clicking (Mac) shows all past events.

In the demo version, to ensure that events are visible on a simple click, the program checks to see that no events are more than 5 days old. If any are, all events are automatically assigned a random date in the near future. Please be assured that this is not a bug. It is present only when using the demo datafile to avoid the possibility that you may see an empty list when trying to find an event!

When you are ready, choose "Create Real Datafile" from the Financial Menu at the Home screen to delete all of the sample data and set things up for your real entries.

After you create your real datafile, it will run for 30 days without restriction before it asks for entry of your serial number. Please be sure you obtain your serial number before this happens. Serial numbers may be obtained once you have tried Book'em! and know you want to keep it.

Registering Book'em!

To register and obtain your serial number, open Edit Return Address from the File menu at the Home screen.

Click Request Serial Number.

Enter the number of users you need, and select the optional modules you want to purchase.

Click Send Serial No. Request. If you've set up email it'll be sent direct. If not it'll create a file that you can attach and send to register@outsidetech.com.

If you have already arranged payment, a registration file will be returned via email within 24 hours. If not, we'll contact you. Current pricing information may be found at http://www.outsidetech.com/BkmPrice.html, and purchase arrangements may be made by emailing salesinfo@outsidetech.com or phoning (888) 7-BOOKEM (726-6536).

General Setup

Let's start with a few basic settings and entries.

Administration

This area is available from the File menu at the Home screen. Users tagged as administrators may set password parameters, add and delete users, and assign and modify passwords and priviledges.

Administrators have additional powers that non-admins don't have, such as modifying program-wide preference settings, rebuilding indexes, running a data dump, and using the search and replace function on a selection of records.

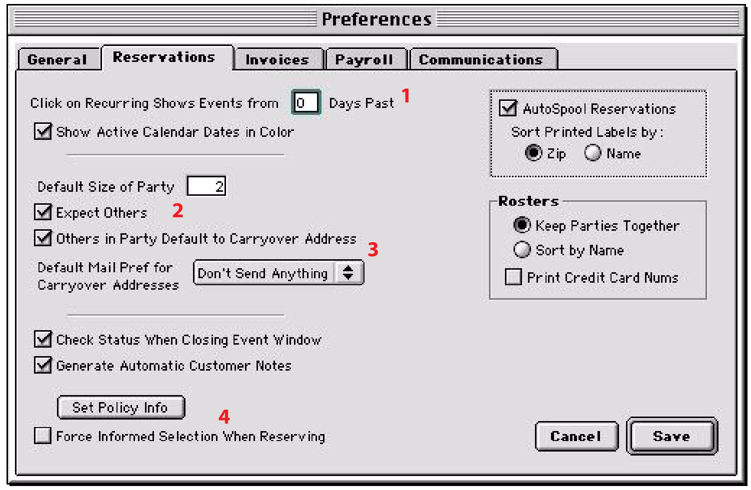
At least one user must be tagged as administrator, but there's no upper limit to the number of users that may be. Remember that *any administrator may control access to the program by all others.*

Preferences

Although this is part of basic setup, it is recommended that you skip this section for now and come back to it after you have experimented a bit and feel comfortable with creating events and taking reservations.

The Preferences area is available from the File menu at the Home screen. Some of the settings are interface settings that apply to the user that's logged in. In addition, administrators have access to program setup functions. Most of the settings are self-explanatory. In this manual we'll just take a look at a few items that require some clarification.

The Reservations Page



1. Click on Recurring Shows Events...

If set to zero, when a master event is clicked at the Home screen, events starting today or later are displayed. Enter a positive number to have X number of past days' events displayed.

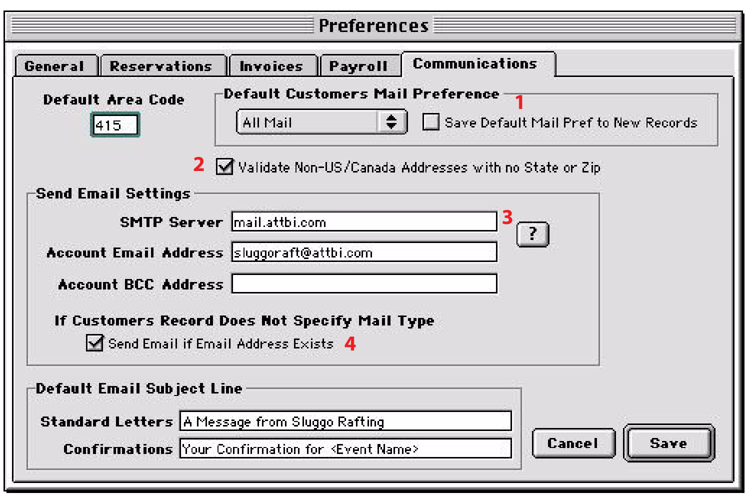
2. Expect Others

If you want to list the names of all people in a party, and keep records for them in the Customer database, mark this option. If you list only the reserving person, deselect it. This setting may be overridden for any reservation by changing the quantity of the invoice's line item.

3. Carryover Addresses

When creating a new customer record for an additional person in a party, Book'em! will auto-enter the surname and address info of the primary reserver if the checkbox on the Reservation Creator is marked. The preference sets the default state of that checkbox.

When the carryover address feature is used, you may choose to set that record's Mail Pref to Don't Send Anything (or something else) to avoid sending duplicate mail to the same household.



The Communications Page

1. Customers Mail Preference

Every Customer record contains a Mail Preference setting. You may choose: All Mail, All Except Promos, Confirmations Only, or Don't Send Anything.

When you are printing a mail merge letter to a selection of records, Book'em! will respect the setting.

The Default Mail Preference has two functions:

a. If the Save Default Mail Pref to New Records checkbox is marked, every new record in the Customer table will default to it. (The exception is the Carryover Address setting -- see above.)

b. If a Customer record has not been assigned a Mail Preference, the Default will apply when printing. This allows you to "float" the behavior based on the mailing.

2. Validate Non-US/Canada Addresses with no State or Zip

When printing hard copy letters or spooling labels, Book'em! will ignore records without a valid address. Normally, to be deliverable, an address, a city, state, and zip (postal code) is required. If this checkbox is marked, records with a country other than US or Canada are given more slack and the state and zip are not required.

3. SMTP Server

The SMTP Server is your send email server address, as provided by your ISP. You can copy this from account settings in your email program. The Account Email Address is the address that recipients will reply to, and will also receive any undeliverable bounces. These two addresses *must* be entered or none of the email features will work.

4. Send Email if Email Address Exists

Makes email the preferred method of communication if the record has a validated email address. The setting is available when setting up a mailing; this is the default.

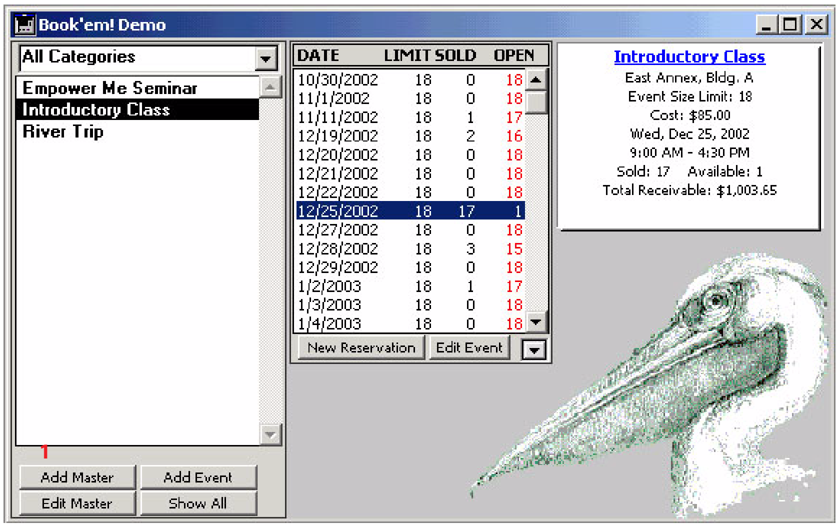
Master Events Setup

Book'em! handles events through a template system. The system's goals are speed, flexibility, and logical organization.

Recurring Event Masters are described by a name, a location and departure point, a cost, a size limit (number of reservations), a duration in days, and start and end times.

Using the Recurring Master definition, individual events may be created simply by clicking a date on a calendar. Any of the characteristics may then be modified, although the event will always be found through the Master it was created by. If the Master is changed later it will not affect event records that already exist, although you will have the option of automatically updating future events. Likewise, as reservations are made for events, specific defaults carried over from the Master may be changed for each customer.

Creating Recurring Masters



5. Click the 'Add Master' Button on Book'em!'s Home screen

This will create an event definition which you may use to generate actual events. All of the settings are flexible defaults and may be modified for any occurrence.

The Master definitions allow automated schedule creation and keep your schedule organized. They do not lock you into rigid boundaries.

6. When the Recurring Events Window opens, type the name of the event.

This name (and other entries to follow) will appear in letters and printed reports, so use the name that you want to present to your customers and be sure to spell accurately. Capitalization is automatic throughout Book'em!, just type in lowercase.

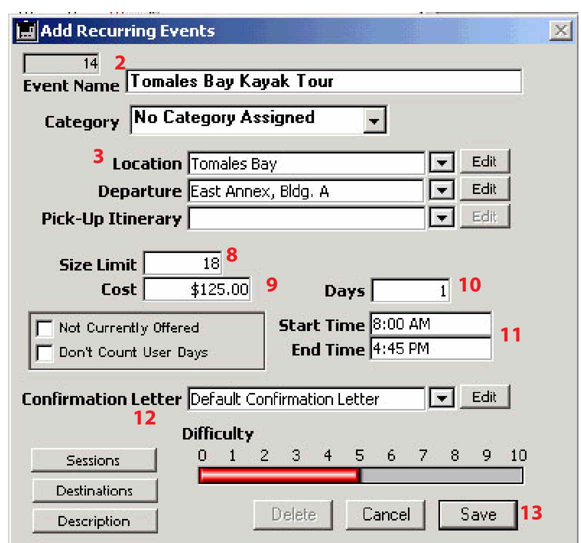
Optionally, you may assign this master to a category. Depending on the nature of your program this may be helpful.

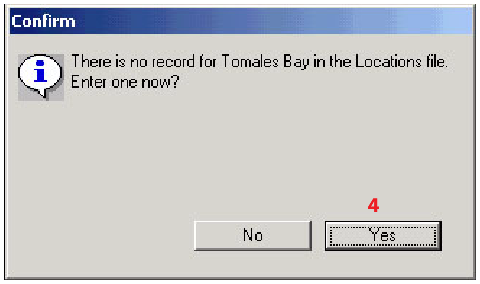
7. Press the TAB key and enter the name of the location.

Press the TAB key again.

Always use the TAB key to move from field to field. If the field TABbed into already contains text it is highlighted and anything you type will replace the old contents.

Book'em tracks user days by the Location record; this is where the event actually occurs. Use the Departure field for the place where participants are to meet you. Info from the Departure is used for confirmation letters.





8. Would you like to create a record for the location? Yes!

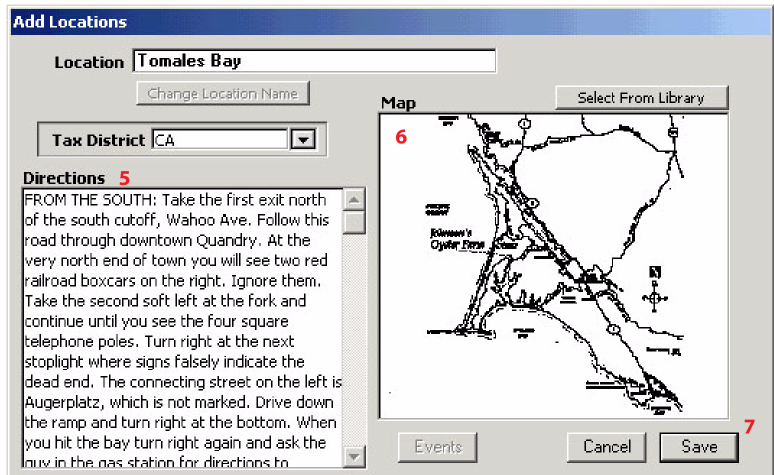
Book'em! must have a "Locations" record for any Event Location or Departure.

9. Type or paste directions to the event's location. TAB.

Directions and maps may be printed on confirmation letters. You can come back and enter this later, if you like.

10. Paste a map to the location.

JPEG is the recommended format, especially if confirmations might be sent as email. Keep the file sizes small for good performance. The map may be entered later.



Any given map need only be pasted once. Once a map has been entered, it will be available to other records by clicking the Select From Library button.

11. Click the 'Save' button to return to the Recurring Master.

Once you've saved a record for a location it will be available from the Location and Departure popups.

12. Enter the event size.

A different limit may be set for any individual occurrence of this event type, and you may choose to override the limit in individual cases. Enter 0 if there is no limit.

13. Enter the event cost.

This is the default full price for this event type. A different cost may be set for specific occurrences, and you may charge whatever you like for any individual reservation by changing the amount on the invoice. Also, you may define discounts from the Financial menu at the Home screen.

14. Enter the length of the event in days

15. Enter the event's usual start and end time.

You may enter 24-hour time, or 12-hour time with a 'p' appended to afternoon times. Typing either 14.45 or 2.45p will enter 2:45 PM. The end time is calculated.

16. Select the event's Confirmation Letter

You may edit the selected letter by clicking the button or write a new one by selecting Create New from the popup menu.

Other options available on the Event Master

- **Pick-Up Itinerary** is a list of shuttle bus pick-up points and each one's number of minutes from 'home.' If an itinerary is defined you can select a pick-up point for each reservation and generate bus rosters.
- **Not Currently Offered** maintains a record for an obsolete event so customer histories are maintained, but keeps it off current lists.
- **Don't Count User Days** keeps reservations for this event from being counted on the location's User Day Report.
- **Difficulty** can be used to compare against a customer's Skill Level.
- **Sessions** allows individual non-consecutive days to be scheduled. A class may be scheduled to meet, for example, Tuesdays and Thursdays for six weeks.
- **Destinations** can be hotels, campgrounds, restaurants, etc. that you want to create rosters for. A record must exist in the Destinations table to be added to the list.
- A **Description** of the event may be entered that may be viewed by clicking the Description button on the Home screen. This description will also be used to generate web pages when that feature is available.

17. Click 'Save' to save the record and return to the Home screen.

This Master template may now be used to create events.

Modifying Recurring Masters

A Recurring Master may be modified by selecting it from the list and then clicking the Edit Master button. When you are finished with your changes Book'em! will ask if you'd like to have the changes applied to existing future occurrences, as of an effective date that you specify. Only events which had the old default value will be updated. For example, if there were 20 upcoming events of this type and two of them had a different location, changing the location of the master would change the location of only 18 occurrences. Dates and times are not changed automatically.

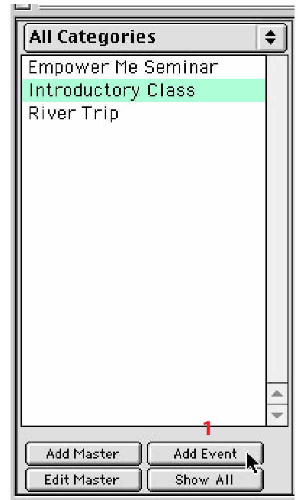
Under no circumstances will amounts charged for reservations that already exist be automatically changed.

Scheduling Events from Recurring Masters

There are three primary ways to schedule events based on Recurring Masters. The best choice depends on the regularity of the schedule and whether the individual events' details deviate from the master's.

The "Add Event" Button

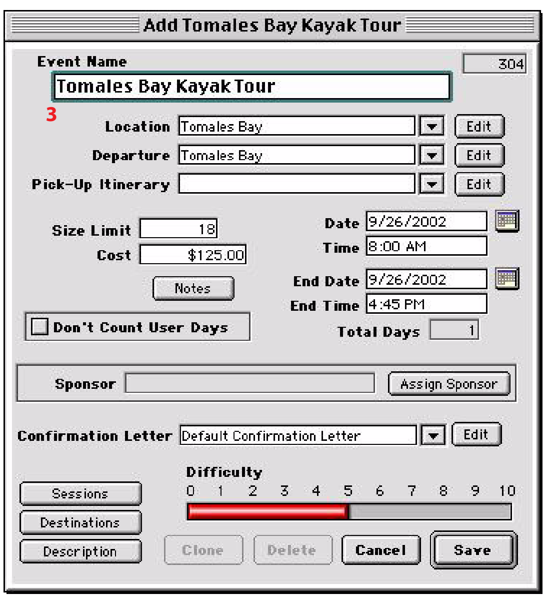
Use this method if you want to add a single event, or a series of irregularly scheduled events with the ability to change details (times, charges, locations, etc.) for each occurrence.



1. The Add Event button is located below the list of Recurring Masters. Select the master, then click the button.

2. A mini calendar opens. Select the date and click OK.

3. The Edit Event window opens with all the master's details entered.



Any of the details may be changed for this event. Save the Event record and you may take a reservation for it immediately.

You may also schedule from the main calendar.

Book'em!'s main calendar is available from the File menu, or by using the keyboard shortcut CTRL (Win) / Command (Mac) - B from anywhere in the program.

Select the day, and then the event definition from the Create New Event popup.

The Edit Event window will open and allow you to modify any of the master's definitions.

Schedule by Calendar

Use this utility to schedule one or more events that will retain all of the details of the master.

Select 'Schedule by Calendar' from the Events menu at the Home screen. (Book'em!'s menus are specific to the frontmost window, each screen's menus relate to the contents. The menus at the Home screen lead to other areas of the program.)

1. Click the date of the event you want to schedule to select it.

Change the month from the month popup menu, or click the two arrows to move up (right arrow) or down (left arrow) one month. The year may be changed by typing it in. After typing in a year, press the TAB key to make the Calendar change. If any events are already scheduled for the selected day, they will be listed in the large open area.

2. Select the Event Master from the popup menu.

3. Click the 'Create Event' button once, or press the keyboard's RETURN key.

Each time the 'Create Event' button is clicked an event is created with the characteristics of the currently selected Recurring Master. If you have many occurrences of this event type to enter, it is very fast to a) click the day with the mouse, b) press the RETURN key with your other hand.

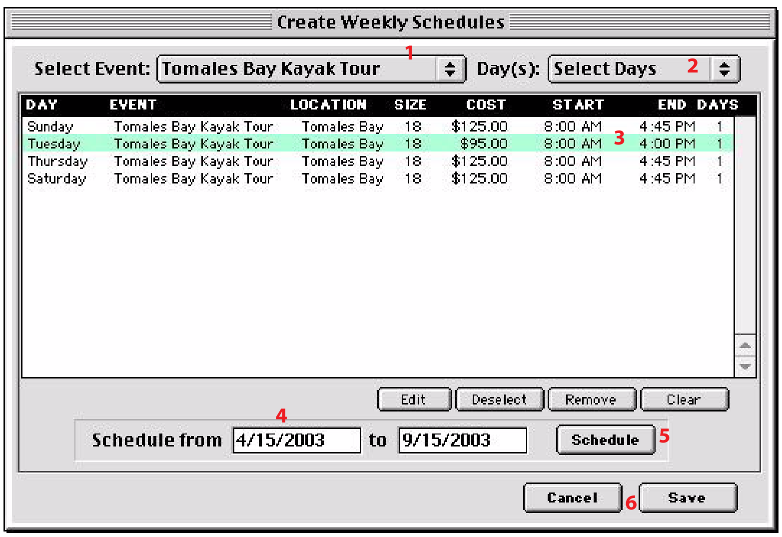
When you are finished adding events of this type, you may select another from the popup and repeat until done.

And when you're finished scheduling click Save to save all changes and return to the Home screen. Click Cancel to return Home and discard all changes.

Create Weekly Schedules

This is the tool to use if you offer regularly scheduled events that occur at least once per week for an extended period of time.

Choose 'Create Weekly Schedules' from the Events menu at the Home screen.



1. Select the event definition from the Event popup.

2. Select the day(s).

Each time a selection is made from the Day(s) popup, the selected day(s) are added to the list. If the event occurs more than once on a given day select the day again.

3. Any day may be selected and edited if any of the details differ from the master.

Maybe you offer a Tuesday special, or the start time varies by day-of-the-week, etc. Highlight the line and click Edit, or double-click the line.

4. Select the start and end dates.

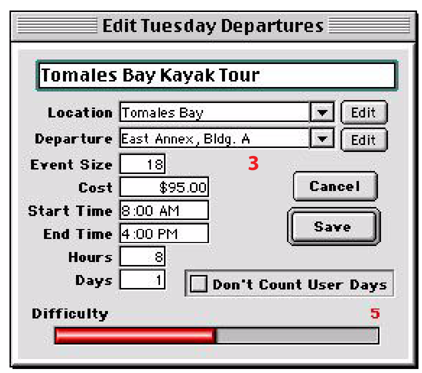
An event will be created for each line on the list for the 'season' defined by the (inclusive) start and end dates.

5. Click the 'Schedule' button Once.

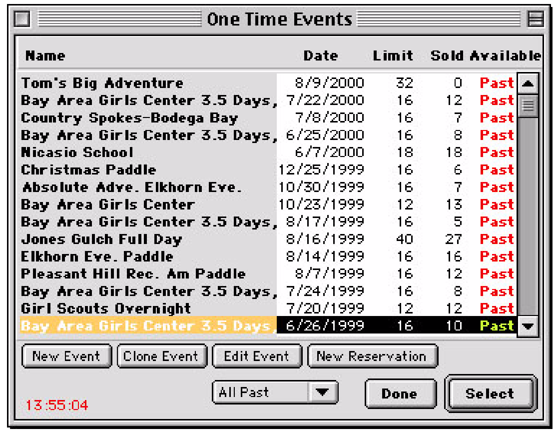
Hundreds of events can be scheduled in a matter of seconds. But don't create too many if you have an old, slow computer; it will just cause delays in building lists when a master is clicked at the Home screen.

6. When finished, Save or Cancel.

Either button will close the form and return Home. Use the Cancel button if you've made mistakes and wish to back out gracefully. If you do not click Save all of the created events will be discarded.



One-Time Events



A One-Time event is just what the name implies: a one-off that doesn't fit any of your established templates. It could be a custom trip or party specially arranged to meet a client's specifications. To avoid cluttering the list of Masters, use the One-Time Events option.

The only difference between one-time and recurring events is the way they are organized and accessed. The reservation process is exactly the same.

Creation and Access

One-Time events are accessed from the Events menu at the Home screen, or CTRL (Win) / Command (Mac) - O. You have the option of having the One-Time Events List open automatically every time Book'em! starts up. Set this option in Preferences.

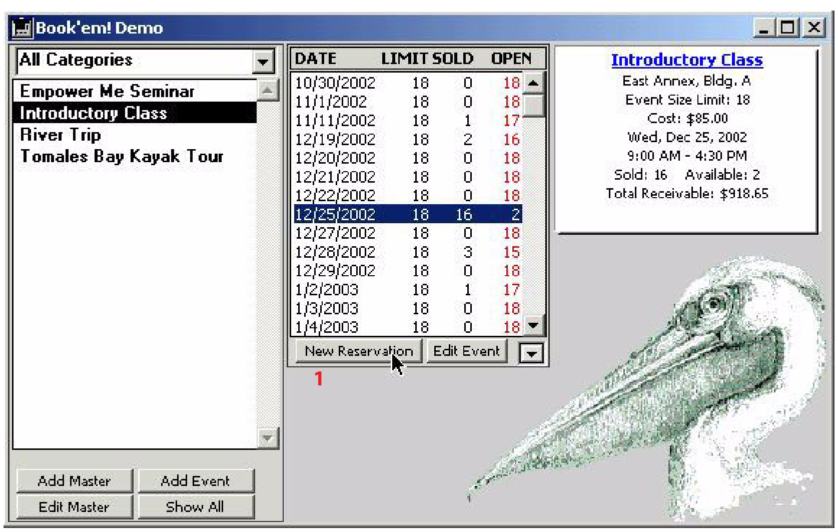
You may also create a One-Time event from the Quote Estimator. This is a powerful tool for determining pricing, discounts, food, lodging, staff, and profit totals for a custom event. For detailed information on this tool see "Event Quote Estimator" on page 89.

The time in the lower-left is the last time the information on the list was updated. This is of concern only if there are other users taking reservations. The list is updated when the window is brought to the front, or by selecting the time frame from the popup menu that's next to the time indicator.

Use the 'New Event' button to add an event. Give it a distinctive name that you'll recognize; if it's a trip commissioned by a customer, you may give the event the customer's name (keep in mind this is the name that will appear on customer's confirmation letters, etc.). If an existing event is selected from the list the New Event button becomes 'Edit Event.' This button will allow you to modify basic characteristics of the event, such as name, date, cost, location, etc.

The event's reservation screen may be opened by double-clicking the event or by selecting the event and clicking the Select button. You may take reservations without opening that screen by selecting the event and clicking the 'New Reservation' button.

On the other hand, if you organize a special event that may happen once or infrequently, but it is an important event and when it's over you'd like to be able to easily find everyone who attended, create a Master for it and use the 'Not Currently Offered' checkbox in the Recurring Master record to have it not show on the list after the event is over.



Taking Reservations

The Reservations process is sequenced like a "Wizard." Completing each step leads logically to the next.

This makes it easy for you to train new users to take reservations.

1. Start the Reservations Process.

Select the event and click the New Reservation button.

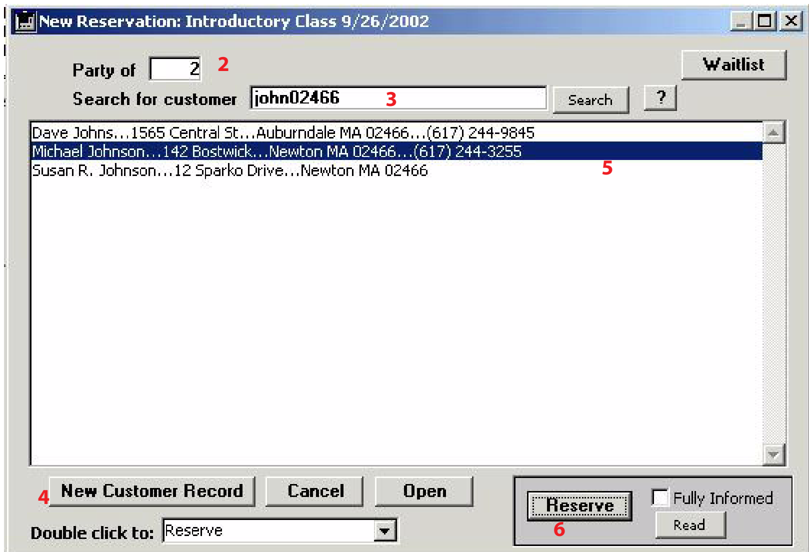
There are New Reservation buttons on the Home screen, the Calendar and the One-Time Events list. You can also start a new reservation by double-clicking the Event open and clicking the button there. The process is identical when started from any window. For any window where a New Reservation button exists, CTRL (Win) / Command (Mac) - N is the keyboard shortcut.

The Reservation Creator opens.

2. Enter the number of people in this party.

If the number entered plus the number already sold puts the event over the defined limit, when you click the Reserve button you will be warned and given the options of overriding the limit, putting the party on the waitlist, or cancelling the reservations process. You can put a party on the waitlist even if the event is not full by clicking the Waitlist button.

The Reserve and Waitlist buttons are dimmed until a customer's name is selected.



If you are running Book'em! on a network, a hold for the requested number of reservations is immediately placed to prevent inadvertent overbooking. When the reservation process is consummated or cancelled the hold is automatically released.

3. Try to find the guest in the Customer database.

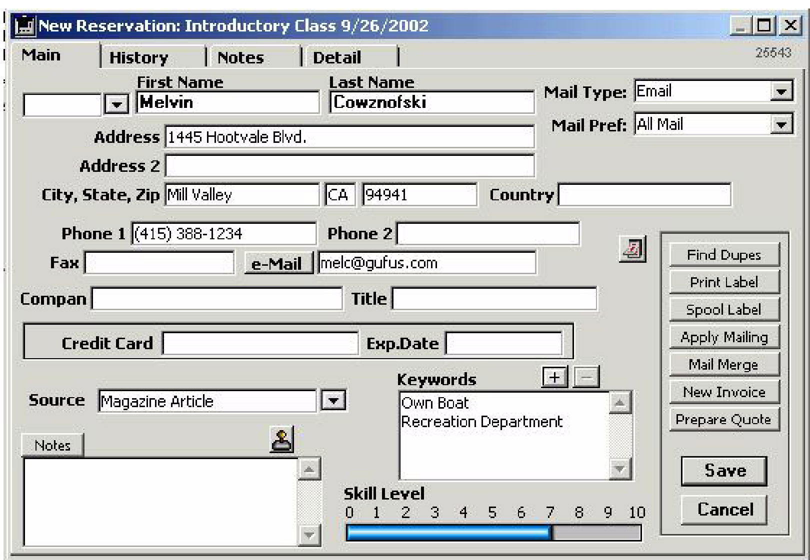
It's very important to avoid creating duplicate records. If there is any chance a record already exists in the Customer database for this person, try to find it and use it.

In the Search for Customer box, type all or part of the name of the reserving person. Enter last name <space> first name. Optionally, you may append a 5-digit zipcode. The number of letters that's necessary to enter depends on how many records are in your Customer table and how common the name is. Once the search name is entered, the TAB key will search the database.

As you can see from the example above, entering John02466 will find everyone whose last name starts with John in the 02466 zipcode. Entering Johnson R will find all Johnsons whose first name starts with R. This may seem counter-intuitive at first, but once you get used to it you'll love it. Guaranteed.

You may click the Open button to check, add or modify information in their record. When you save the record you come back to the Reservation Creator.

4. If a record for this person does not already exist, click the New Customer Record button to create it.



Enter all of the person's information in the appropriate fields. Use the TAB key to move from field to field.

Capitalization is automatic (unless you turn it off in Preferences), and telephone and credit card numbers format automatically (just enter the numbers).

Click the Detail tab to enter additional information about this customer. You can enter height, weight, diet & medical info, interests, and more. If any of these fields have data they will print on the trip's roster.

When you save the new record you come back to the Reservation Creator.

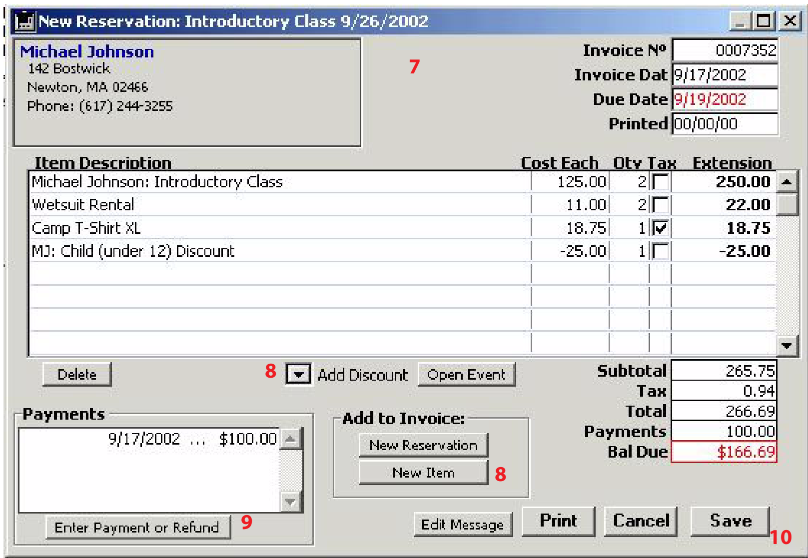
5. Once the person's record is shown in the list, click their name to select it.

If appropriate, mark the Fully Informed checkbox to indicate the guest has been informed of your company's cancellation and liability policies. You may enter the policies in Preferences (File menu at the Home screen) and view using the Read button. Or you may choose to use this to indicate you've received a signed contract or liabilty waiver.

6. Click the 'Reserve' button.

The reservation is saved. Now you need to deal with the money.

7. Book'em! creates an invoice and opens it.



You don't need to actually invoice the customer; this is just the way charges and payments are managed.

8. Enter other charges or discounts.

From the Home screen, entries may be made to the 'Equipment and Sale Items' table (Databases menu), and added to invoices by using the New Item button. Also from Home, standard discounts may be entered with the Discount Editor (Financial menu) and applied to reservations by using the Add Discount popup. If other people in the party are being paid from this invoice, either click the 'New Reservation' button or change the quantity in the reservation line to the appropriate number. If others in the party will have their own invoice, you'll be able to enter them after this invoice is saved.

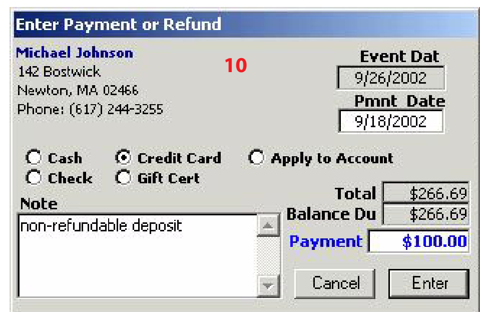
9. If a payment is being made, click the Payment button.

Partial payments are OK. Click the payment type and add any notes regarding the payment.

10. Save the payment and the Invoice.

If the number of reservations charged is less than the number in the party, you'll be asked to add them now. This request works just like the one described in #4, with the addition of the 'Carryover Last Address' option.

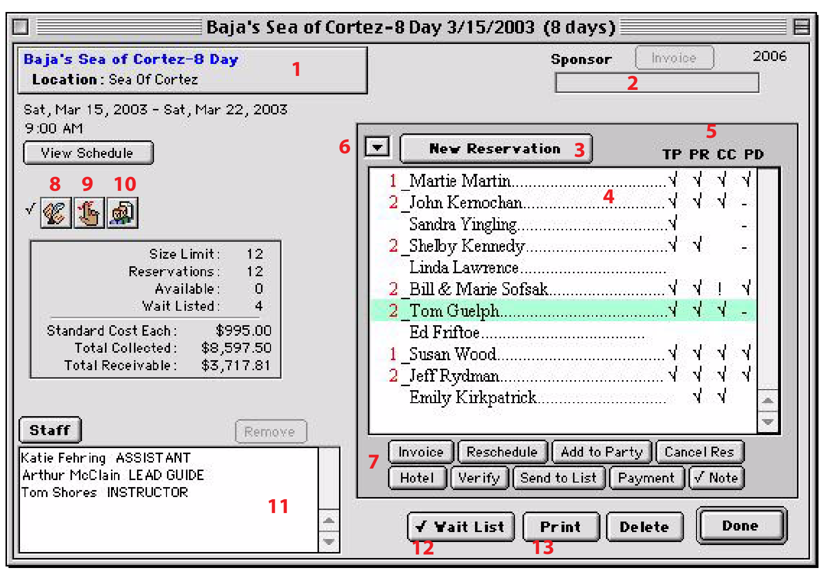
That's it! You have just completed the process for taking a reservation. Once you have done this a few times it will be easy and very fast.



The Event/Reservations Window

This is the window that lets you view and control the details of an actual event and its reservations. Open the window by double-clicking an event from any of these screens:

- The Home screen
- The Calendar
- The One-Time Events List
- The Reservation Finder
- A Customer record's History page



1. The Event Title Button

The button containing the event's name in the upper left opens the window that lets you edit the event's definition: locations, cost, limit, times, etc. This is the same window that opens when the Edit Event button is clicked from the Home screen.

2. The Sponsor area

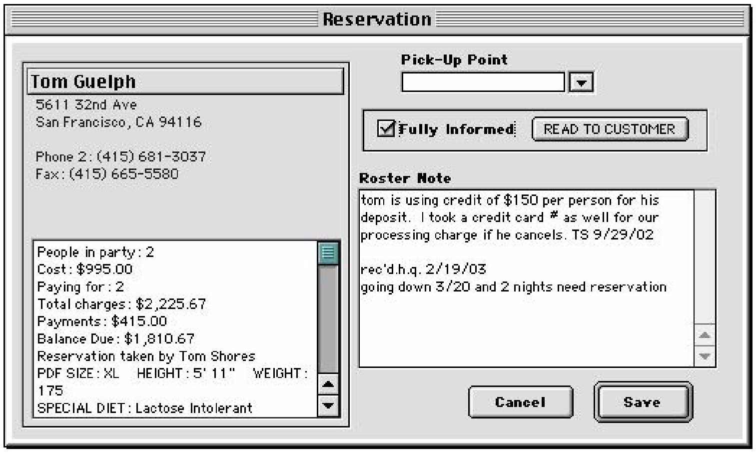
If this event has a sponsor, they'll be shown here. A sponsor is billed for all or part of an event's cost. This is the mechanism to bill a person or company who does not need a reservation for the event. Set up sponsorship from the Edit Event window, page 6.

3. The New Reservation button

Creates a new reservation for this event. The process is described starting on page 8.

4. Reservations List

All people with reservations to this event are listed here, organized in parties and listed in the order their reservations were entered. The number of people in the party is shown in red to the left of the group's 'Kingpin.'



Double-click a reservation to open and edit the Reservation record, shown to the left. The person's name is a button which opens their record. You may open the customer record directly from the reservations list by holding down the Shift key while double-clicking the reservation line.

Select a reservation to activate most of the buttons below the list.

5. Reservation Columns

The 4 columns on the right side of the reservations list provide valuable information:

TP: Told Policy. This column is checked if the Fully Informed checkbox has been marked. This may be set while taking a reservation and in the reservation record.

PR: Printed. A checkmark (√) indicates a confirmation letter has been printed.

CC: Credit Card. Shows a checkmark (√) if a valid number is on file and a question mark (?) if there is a number which couldn't be validated. This is particularly useful if you hold reservations secured by a credit card.

PD: Paid status. Shows a checkmark (√) if the account is paid in full, a hyphen (-) if there's a partial payment, zero (0) if there's an invoice with no charges, a plus sign (+) if overpaid, and a blank ( ) if the reservation is billed on another person's invoice.

6. The Index Popup

A list of all people with reservations to this event in alphabetical order. Select a person to highlight their name. This is very useful for events with more than 20 or so reservations.

7. The Small Buttons

Invoice opens the invoice for the selected reservation.

Reschedule opens a list of upcoming events into which the selected reservation may be rescheduled.

Add to Party starts the reservation process and adds the new person to the selected party. The new person has his own invoice. To add to party and bill the new person to an existing invoice, open the invoice and use the New Reservation button.

Cancel Res cancels the selected reservation. Allows you to refund and/or credit the person's account.

Hotel. If a reservation is selected and at least one hotel is defined for the event, the Hotel button lets you make room assignments and enter bed prefs. If a reservation is not selected, or if the Control (Windows) or Command (Mac) key is pressed, you receive the total of rooms needed and a breakdown by type, ie singles, doubles, etc. If no hotel is defined for the event the button is dimmed.

Verify checks all reservations and alerts you to any inconsistencies in the number of people in each party, any declared reservations that have not been billed, and any invoices that are past due.

Send to List opens the Customer database (see the next section, "Databases") with this event's customers in selection. Try it and notice all the commands that may be applied to the selection.

Payment lets you enter a payment without opening the invoice. Works only if the selected person has his own invoice.

Note lets you enter or modify a roster note for the selected person.

8. The Event Note Button

To enter or modify general notes for the event. Prints on the To Do list.

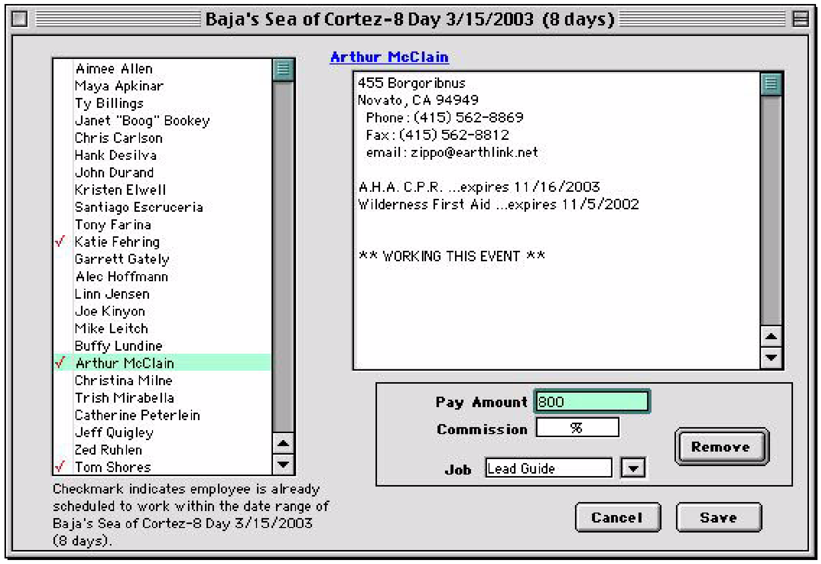
9. The To Do List Button

Lets you add and modify items for the To Do List. Each item may have a designated date and time, be assigned to a person from the Staff table, and have general notes.

10. The User Days Button

Quick check of user days for this event's location for the month the event occurs in.

11. The Staff Area



The Staff button opens a window (shown to the right) which lists all staff people who are tagged as 'Instructor' (this designation tells the program which employees are eligible to work events).

The Payroll process looks at these assignments and pay amounts to calculate totals. Designated staff appear atop rosters and can be referenced in confirmation letters.

If the staff person is assigned to work this event or any other event that overlaps this event, a checkmark is shown in the left column.

Select a staffer and see their address info, the events they're scheduled to work during this time period, and their current certifications in the box to the right.

Select a staffer, enter a pay amount and/or commission, designate their job, and click the Select button. If the selected staffer is already working this event the Select button becomes Remove.

12. The Wait List Button

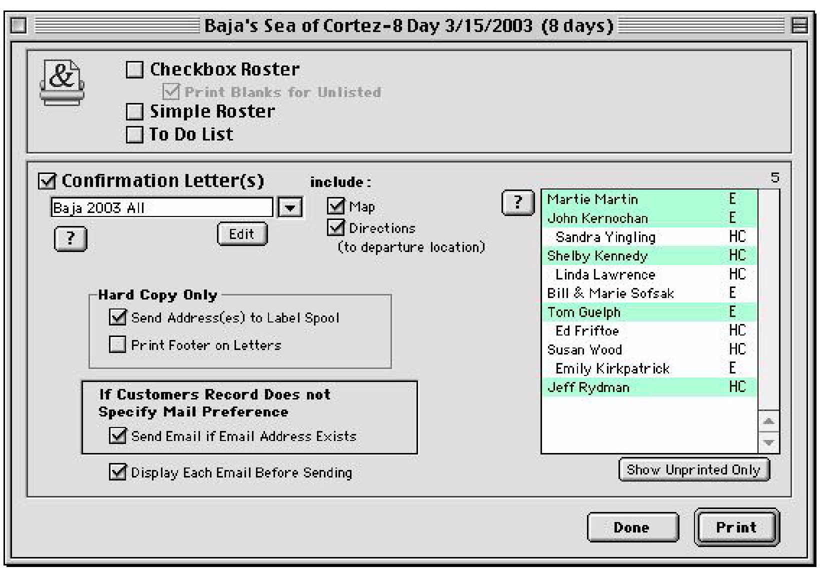
Opens the waiting list. Those waitlisted for this event are shown, but there is a popup that allows people waitlited for other events to be accessed and reserved.

If a person calls who is on the waitlist for Event X, and wishes to do Event Y instead, open Event Y. Click the WaitList button and select This Event Type (if Event X and Y are the same type) or Entire Waiting List (if they are not) from the popup menu. Confirm their reservation from there.

13. The Print Button

Opens the Print Event window, shown below. You may choose to print any or all of the items shown.

The confirmation letter shown is the one selected in the Master or Event definition, but you may select any on the list to print, or write a new one. Click the Edit button to modify the letter. If you change the letter here it's changed for the whole program.



If there is a map and/or directions entered in the Departure location's record the Map and Directions checkboxes will be active. If the confirmation is sent as email, the map will be attached in jpeg format and the directions included in the body text.

The list of guests shows only those who have not yet had a confirmation printed. To print a letter for someone who has already had one printed click the Show All button. The primary reservers' names are flush left and others in their party are indented.

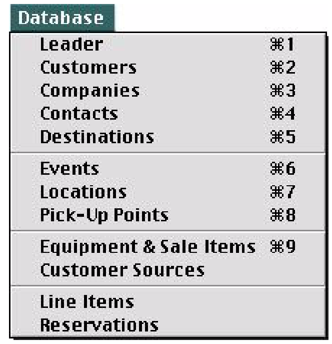
The letter to the right of the names indicates whether the confirmation will be printed hard copy or sent as an email. Book'em! makes that determination based on settings in the customer records and whether the records contain valid email and/or physical addresses.

You can send email to any customer whose record contains a valid email address by marking the Send Email if Email Address Exists checkbox. And you may print hard copy for any customer by holding down the Alt key (Windows) or Option key (Macintosh) and clicking the name.

You may select as many guests as you like to send the selected letter to. For contiguous selection click names with the Shift key down; for individual selection click with the CTRL (Win) / Command (Mac) - key down. The number just above the list of guests on the right shows the total letters/emails that will be processed.

In order to print confirmation letters the checkbox must be marked and at least one person must be selected.

The Databases



The Database menu at the Home screen gives direct access to records in some of Book'em!'s data tables. Some of the items under the Financial menu also access main data tables: Receivables (opens Invoices with a balance due), Payroll Records, and Transactions (payments, refunds, payroll amounts).

In these areas you may (if appropriate to the data) add, modify, and delete records, import and export, create reports and graphs, send mail merge letters and manage mass mailings, and many other things.

The QuickSearch Window

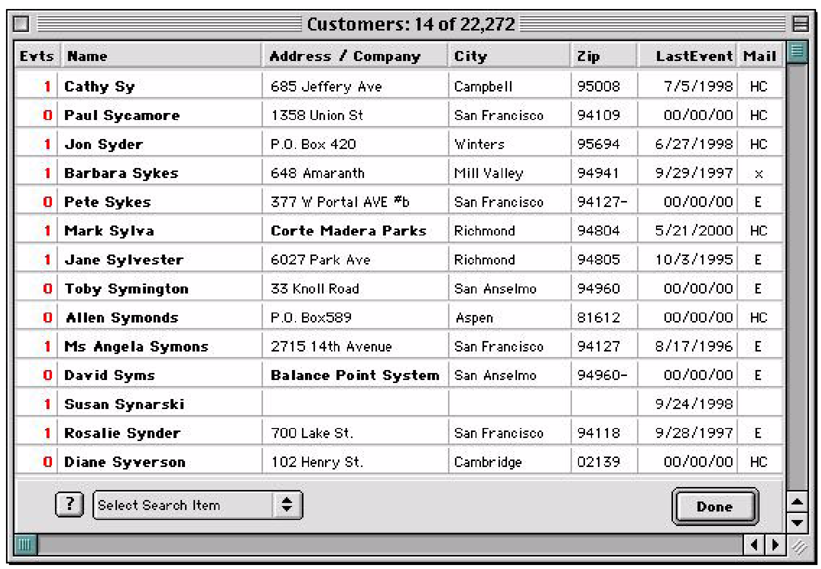
When any item from the Database menu is selected the QuickSearch window opens. This allows you to tell Book'em! what records you want to find, or that you want to create a new record.

The available fields to search are different for each table. In most cases a "Starts With" search is the best option. If the field you want to search on is not available, click the Search Editor button for access to all fields and multiple criteria. When you use the Search Editor, any settings you may have made in the QuickSearch are ignored.

If you do not care that the list be sorted, and you suspect the number of records found will be large, turn AutoSort off.

The New Record button will let you create new records. Every time you save a record a new blank is created. When you are finished adding records, cancel the next blank. (the add-until-cancel feature may be turned off in Preferences by an Administrator.)

The List and Selections


Customers: 14 of 22,272

Evts	Name	Address / Company	City	Zip	LastEvent	Mail
1	Cathy Sy	685 Jeffery Ave	Campbell	95008	7/5/1998	HC
0	Paul Sycamore	1358 Union St	San Francisco	94109	00/00/00	HC
1	Jon Syder	P.O. Box 420	Winters	95694	6/27/1998	HC
1	Barbara Sykes	648 Amaranth	Mill Valley	94941	9/29/1997	x
0	Pete Sykes	377 W Portal AVE #b	San Francisco	94127-	00/00/00	E
1	Mark Sylva	Corte Madera Parks	Richmond	94804	5/21/2000	HC
1	Jane Sylvester	6027 Park Ave	Richmond	94805	10/3/1995	E
0	Toby Symington	33 Knoll Road	San Anselmo	94960	00/00/00	E
0	Allen Symonds	P.O. Box589	Aspen	81612	00/00/00	HC
1	Ms Angela Symons	2715 14th Avenue	San Francisco	94127	8/17/1996	E
0	David Syms	Balance Point System	San Anselmo	94960-	00/00/00	E
1	Susan Synarski				9/24/1998	
1	Rosalie Synder	700 Lake St.	San Francisco	94118	9/28/1997	E
0	Diane Syverson	102 Henry St.	Cambridge	02139	00/00/00	HC

The window title of the data lists tells you how many records are in selection and how many records are in the table. In the example there are 22,272 total Customer records and 14 in the current selection. Performing a search changes the selection.

You may also make a direct selection by single-clicking records with the mouse. Hold down the Shift key and click any 2 records for a contiguous selection. Hold down the Control key (Windows) or Command key (Mac) and click to toggle selection of any single record on or off.

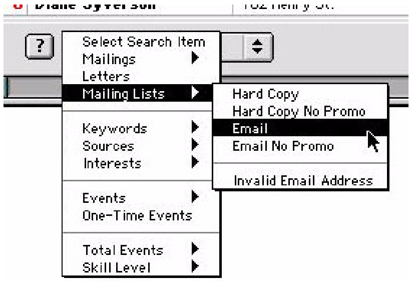
When you select an action item (Apply Keyword, Send Letter, Apply Mailing, Spool Labels, Add to Base Selection, Export, etc) from the menus, the action is applied to the records in selection unless you have made a direct selection with the mouse, in which case the action is applied to the direct selection. The exception to this is the Delete command, which is applied *only* to a direct selection. A complete description of the many commands available from the list screen menus is beyond the scope of this QuickStart, but most are self-explanatory.

Double-click a record to open it for editing.

Creating Selections

The Search Editor, available from the Tools menu at all of the database list screens, allows you to select any field and specify a value to search for. You can add lines to query multiple criteria. Please see the accompanying document Search_Sort.pdf.

The Base Selection commands allow you to set up a "bucket" and add or remove the selections created by multiple searches.



There are popup menus in the footer area of many data table list screens that change the current selection. The Staff, Companies, and Destinations table search by keyword, the Events table has a date range search (as well as a popup that lets you decide whether to open the Edit Event window or the Event/Reservations Window).

The popup for the Customer table has many options. You can find customers who have taken a certain event, or received a certain mailing, or qualify for a certain mailing list, or any of the other items.

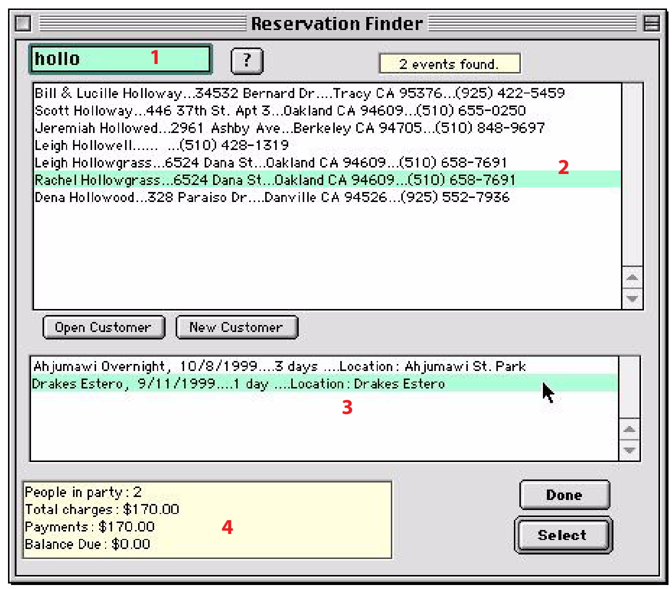
When you make a selection from the customer list footer popup, holding down the Shift key causes the search to be done within the current selection. Holding down the Alt key (Windows) or Option key (Mac) searches for people who do not meet the selected criterion. The two keys may be held down in combination to remove those who do not meet the criterion from the current selection.

The Reservation Finder

CTRL (Win) / Command (Mac) - F opens the Reservation Finder from almost anywhere in Book'em!

The Home screen indexes events by type; the Calendar indexes events by date. The Reservation Finder indexes them by participant - it does a fast search by customer name and shows you all their reservations.

Also, it's an ideal tool to use when adding new customer records. Do a search and, if the person is not found, click the New Customer button.



1. Type the name and TAB.

The search works just like the customer name request in the reservation process: the format is any amount of last name <space> first name + zipcode. Adding the zipcode is optional, but if you do add the zip it must be exactly 5 numeric characters.

After TABbing, the name box is highlighted again and another name may be entered. Remember, typing over highlighted text replaces the text.

2. Select the person to show reservations

After selecting the person, all of their past and future reservations are shown in the second list area (3) and general account info is shown in the lower text area (4).

Select a reservation and the account info for that reservation is shown in the lower text area (4).

Double-click a reservation to open the Event/Reservation window for the event and highlight the reservation on that list.

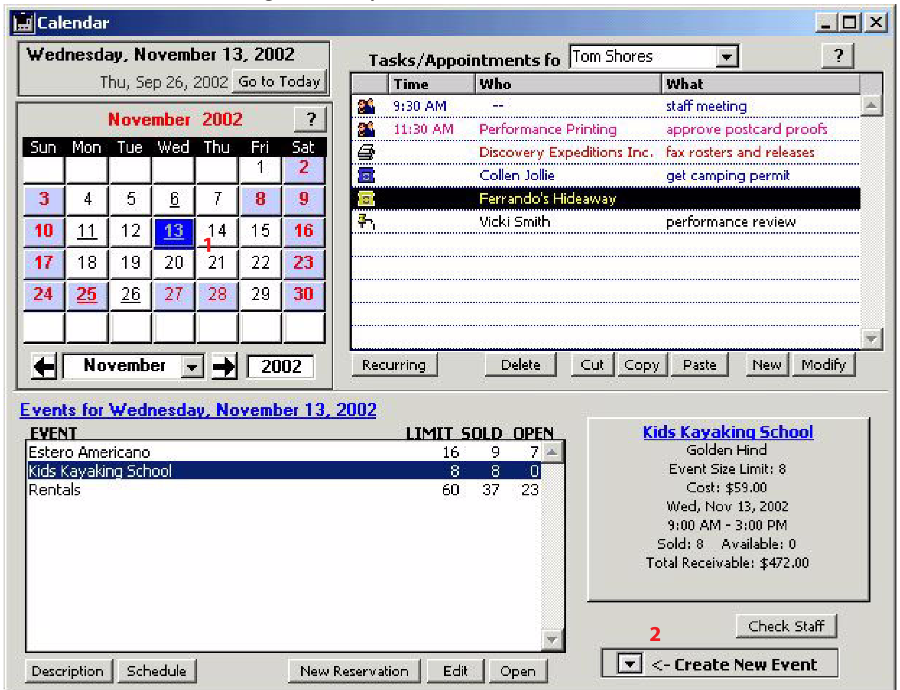
Using the Finder to add new customer records

It's extremely important to avoid entering duplicate records. There should be only one record for any person in your database. The Reservation Finder is a great tool to use to quickly search the customer database before adding a new record for a person not making a new reservation. If there's any doubt about the spelling try variations, or just the first few letters of the last name plus zipcode.

When you're sure there's no existing record for this person, click the "New Customer" button, or CTRL (Win) / Command (Mac) - N.

The Calendar

CTRL (Win) / Command (Mac) - K opens the Calendar from almost anywhere in Book'em! The Calendar shows all events occurring on a selected date, including multi-day events that started earlier.



The Calendar Key

Dates that have any event scheduled are shown in color.
Dates on which an event begins are shown in bold type.
Dates with appointments are underlined.
The selected date is darkened. All other sections of the Calendar screen pertain to the selected date.

Creating Events with the Calendar

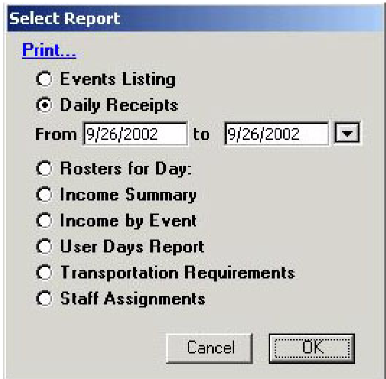
Select the date (1), then select the event type from the Create New Event popup (2). The Edit Event window will open and allow you to modify any of the master's definitions.

Tasks/Appointments

The Tasks/Appointments section shows reminders for users of the database, color-coded by priority. Appointments with customers, staff, contacts, etc. may be created here or by clicking the small Make Appointment icon in the individual records. (To-do items assigned to staff from event windows are not shown here.)

Marking a task "Completed" causes it to be removed from the list, unless "All" is selected from the popup. A setting made in Preferences causes uncompleted past tasks (except meetings) to be moved forward to the current date.

Printing Reports and Letters



Wherever you go in Book'em! the menus relate directly to the content of the frontmost window. There are different menus for the Home screen, the database lists, database records, the event window, calendar, etc.

Use the Print command (File Menu) in the various locations to print pre-built reports based on the record(s) displayed. Use the Report Editor (Report Menu) to build you own reports based on the records displayed.

Reports

The Print command from the Home screen opens the report selector shown to the left. When a report is selected, you may then select the date or date range the report will include.

The **Run Payroll** command from the Financial Menu at the Home screen results in a printed report that itemizes and totals each employee's assignments for the specified payroll period.

The Print command in Receivables results in a pre-built report containing the customer name, phone, event, and amount owed.

The Report Menu at the Event window contains a number of pre-built rosters and reports. Also, see "The Event/Reservations Window" starting on page 10, for a description of printing functions available there.

When the Print command is selected from the File Menu at any of the database lists, the records in selection are printed. See the earlier chapter "The Databases" starting on page 13 for info on creating selections. Also from any of the database list screens, the Report Editor (Report menu) may be used to build custom reports. Please see the accompanying document Reports_Labels.pdf for instructions on using the Report Editor.

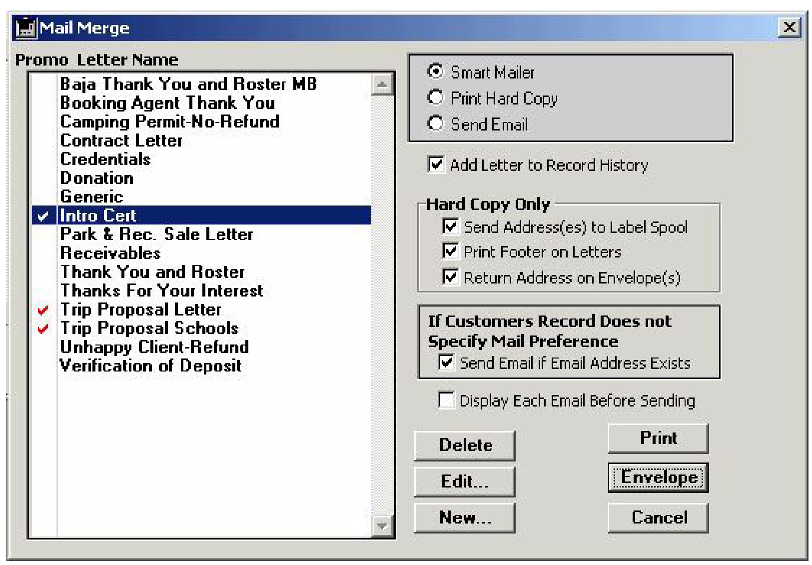
When an individual record is opened from the database lists, use the Print command for a detailed printout.

The Calendar may be printed either as a graphical month or a daily listing of events or tasks.

Letters

Book'em! allows letters to be composed to anyone in the Customer, Staff, or Contacts database, using data specific to the person and the event they're reserved into. They may be printed or sent as email. Confirmation letters may be sent from the Event window, and general mail merge letters from the database list screens. Any number of letters may be composed, named, saved, and used at any time.

General Mail Merge



Pictured to the right is the Mail Merge controller, which is accessed from the Send Mail command (File menu at the Customer List). The Mail Merge button from any customer record opens a simplified version.

The **Smart Mailer** feature examines each record to determine whether to print hard copy, send email, or do nothing. Following is a description of how the decision is made.

Every Customer record contains a Mail Preference setting. You may choose:

- All Mail
- All Except Promos
- Confirmations Only
- Don't Send Anything

The same choice list is available on the Communications page of Preferences and will apply to customer records that have not been set manually.

The first thing Book'em! does is determine what kind of letter is selected. You may designate any letter as a Promo. If a Promo letter is selected, only customers tagged All Mail will be printed or emailed. (Confirmations are printed at the Event window.)

Every customer record also contains a Mail Type setting. You may choose:

- Email
- Hard Copy

If the setting is made it will be used. If the setting is not made for the record, and the Send Email if Email Address Exists checkbox is marked, and the record contains a validated email address, Smart Mailer chooses email. If those conditions are not met, the physical address is examined and -- if it's a valid address -- hard copy will be printed. If the address is not valid, Book'em! checks for a valid email address and sends email if present.

This sounds complicated, but it's designed to make the appropriate choices without much user intervention.

Alternately, you may elect to use either the Print Hard Copy or Send Email modes and Book'em! will either send hard copy to all qualifying records in the selection with a valid physical address, or email to all with a valid email address.

Composing the Letter

This info pertains to both the standard text editor, and the 4D Write word processor.

Under the Merge Items menu are data that can be added to the letter. The merge item will be replaced with data specific to the record being printed. For example, the item <<Dear...>> will be replaced with *Dear Bill,* if no salutation is entered, or *Dear Mr. Gates,* if one is.

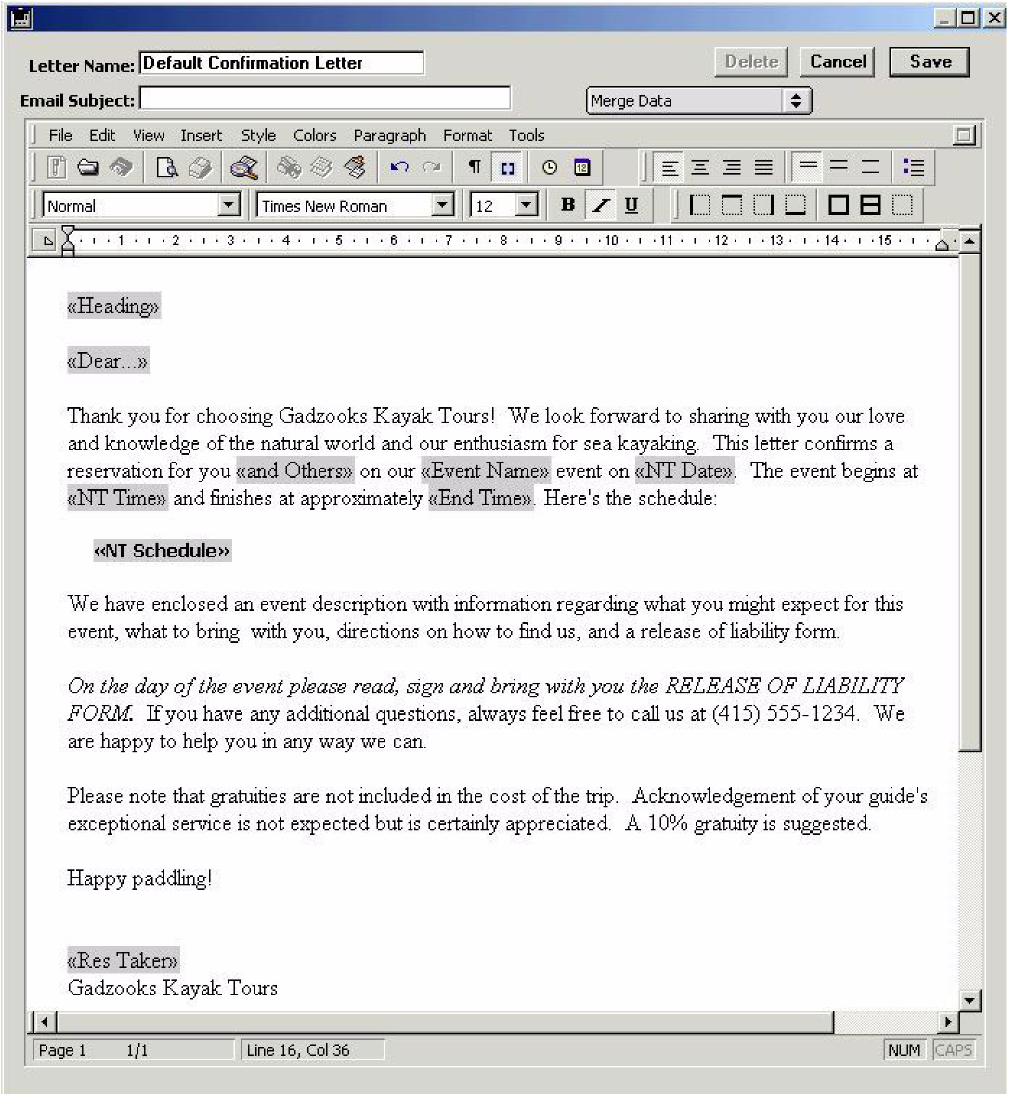
There is an area in Preferences for a default email subject, which will be used if none is saved with the letter.

If an existing letter is opened and modified and the name is changed, the letter is saved with the new name without deleting the original. This is equivalent to the Save As... command and is a way to use existing letters as templates.

The Standard Text Editor

If you have not purchased the optional word processor module, you may compose the letter with the plain text processor, shown to the right.

You may set the font, size and style for the entire letter.



If you have purchased the word processor module (shown above), font characteristics may be applied to selected text, and you have access to standard word processor functions like margins, tabs, indents, paragraph and character styles, etc.

Also, in addition to the Merge Items popup, there is direct access to all of the fields in the database: choose 4D Expression from the Insert menu.

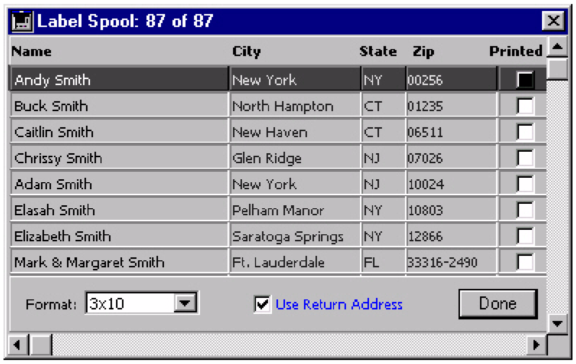
Labels

One at a time labels

Book'em! provides a simple mechanism for printing individual mailing labels to a printer such as a Dymo (tested and recommended).

On the first page of Preferences, click the Label Printer Application button and select the software program that operates the printer.

When in a person's record, click the Print Label button. The full address is copied to the clipboard, the label printer's application is opened, and you can paste to the default label form.



Label Spool

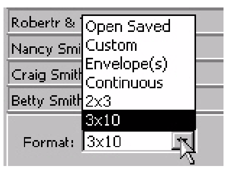
The concept behind the Label Spool is to allow you to accumulate records of people that you need labels printed for as you work, and also to consolidate all of the label printing tools in one place. If you are running Book'em! with 4D Server, labels from all users are sent to one spool so that one user may print all accumulated labels.

Records in any of the people tables may be sent to the Label Spool by clicking the Spool Label button in a record screen or by selecting records from a list screen and choosing Spool Labels from the File menu. There are Spool Label checkboxes in the Mail Merge and Apply Mailing dialogs. If the Preferences option is taken, new reservations will be automatically sent to the spool. Also, you may manually add people to the spool that do not have records elsewhere in the database.

To access the Label Spool, select it from the File menu.

Any names you have saved while working in other areas of the program are shown. You may convert any selection of records to ALL CAPS or Upper and Lowercase (Title Case) by choosing the appropriate command from the Tools menu.

Double-click a line to view or modify the formatted label.



Choose the printing format from the popup menu in the footer area of the Label Spool list, then one of the print commands from the File menu.

3x10 is the standard mailing label, will print to the standard Avery 5160 laser labels, 3 across by 10 down.

Custom allows you to design a label using 4D's Label Editor. See the accompanying document Reports_Labels.pdf for instructions.

Quick Reference

To create a one-time event

Choose 'Create One-Time Event' from the Events menu at the Home screen, or click the 'New' button on the One-Time Events List.

To open the One-Time Events List

Choose 'One-Time Events List' from the Events menu at the Home screen.

To open the Calendar

Choose 'Calendar' from the File menu, or command-K (Mac) control-K (Windows) from anywhere.

To enter a new reservation

Use the 'New Reservation' button that is available on the Home screen, the Calendar, and the One-Time Events List. The event must be selected from the shown list. Or, open the event's record from any of these three 'Launchers' and use the 'New Reservation' button.

To add someone to an existing party

Open the event's record. Select the maker of the party's reservation and click the 'Add to Party' button. Or open the invoice and add from there.

To add someone to the Wait List

When you try to enter a reservation that would exceed the limit of an event, Book'em! will ask if you'd like to put them on the Wait List. (You may override the limit and book anyway, if you choose.) Or you may click the 'Wait List' button from the Reservation Creator (page 8).

To move someone from the Wait List to a confirmed reservation

Click the 'Wait List' button from the event's record. Select the person and click the 'Confirm Reservation' button.

To enter a payment for an existing reservation

Open the event's record. Select the person making the payment and click the "Payment' button. Or choose 'Receivables' from the Financial menu at the Home screen and double-click the person's line. Unpaid reservations from all events are listed here.

To add a roster note to a reservation

Open the event's record. Select the person and click the 'Note' button.

To reschedule a reservation to a different event

Open the event's record. Select the person and click the 'Reschedule' button. Choose the new event from the list. Any payments will be transferred, and you'll be asked if others in the party should be brought along.

To reschedule an entire event

Select the event from the list (center) at the Home screen. Click the 'Edit Event' button and change the date and/or times. Any existing reservations will stay with the rescheduled event.

To cancel a reservation

Open the event's record. Select the person and click the 'Cancel Res' button.

To find a person's existing reservation(s)

Command-F from anywhere opens the Reservation Finder

To create estimates for a client's custom event

From the Financial menu at the Home screen, open Quote Estimator Defaults. For each of the items that may be used, enter the amount it costs to provide the service, and the profit margin you hope to earn. The profit margin is expressed as a percentage of the amount the client pays.

From a Customer record, click the Prepare Quote button and enter number of people, duration, etc. You may save any number of quotes for any customer. Any quote may be used to generate a One-Time Event.

To create and apply discounts for reservations

From the Financial menu at the Home screen, open Discount Editor. You may create standard discounts based on many criteria. If the discount is set to Auto-Apply, when creating a reservation, Book'em! examines the data and alerts you if the reservation is eligible. All saved discounts are available from a popup menu on the invoice and may be applied to any reservation.

To create an invoice not connected to an event or reservation

Open or create a customer record and click the New Invoice button.

To enter payments for multiple open invoices

From the Receivables list, select multiple invoices and click the Payment button. Each Payment window will open sequentially. See the chapter The Databases for tips on making multiple selections from a list.

To print trip lists and other reports

Several important reports may be accessed with the 'Print' command from the File menu at the Home screen. Others are available from the Report menu at the Event windows, and custom reports may be built at any primary list screen.

To print lists of people

Create a selection in the file you want to print from (see the User Guide) and choose 'Print' from the File menu at the List Screen.

To print mailing labels

Send records to the Label Spool by creating a selection of people and choosing 'Spool Labels' from the File menu at the file's

List Screen, or by clicking the 'Spool Label' button in a person's record. When printing letters, if the Send Address to Label Spool checkbox is marked, a label is spooled when the letter is printed as hard copy..

To import or export records

From the list screen of any of the databases, choose Import or Export from the File menu. The Export command exports the records in the current selection, which you control by query. The Import/Export editors let you choose the fields, delimiters, and formats for the procedure.

For more complex exports including data from related tables the Report Editor may be used. From the File menu, go to Print Destination and select Disk File.

To change the logged-in user without quitting the program.

Choose Log Off from the File menu at the Home screen. The program will not be able to be used until a user enters their password to enter.

General Hints & Tips

• *Back up your datafile regularly.* On Macintosh the datafile is named Book'em!.data, on Windows it's Book'em!.4DD.

• Use an Uninterruptable Power Supply (UPS) for your computer (single-user) or server to prevent possible data corruption in the event of a power failure or brownout.

• Move from field to field using the TAB key on the keyboard.

• If the field you TAB into contains text, it is highlighted. If you type anything, you replace whatever was there before. This means you don't need to swipe existing data to remove it, but it also means you should be careful not to delete valuable data. If you accidentally do this, use the Undo command from the Edit menu.

• Buttons should only be clicked once. Never double-click a button.

• Whenever an actual record is open for modification, there will be a Save, Cancel, and Delete button. All 3 will close the record. The Save button saves your changes, the Cancel button leaves without saving changes. Pressing Delete will permanently delete the record.

• For records on a list: click once to select; click twice to open.

• Many buttons won't work until something is selected. The general rule is to select records first, then choose the action.

• Back up your datafile regularly. On Macintosh the datafile is named Book'em!.data, on Windows it's Book'em!.4DD.

Dire Warnings

• Never turn the computer off while Book'em! is running. Always quit Book'em! by selecting Quit or Exit from the File menu, or using the corresponding keyboard shortcut.

• Use an uninterruptable power supply (UPS) with battery backup.

• There are many ways that computer files can be damaged or lost. Power surges or failure, crashes, fire, theft are just a few. It is essential that you get into the habit of making regularly scheduled and properly stored archived backups. Back up whenever you've entered more data than would be convenient to re-enter. ***Never store backups on the computer!*** Store backups on removeable media such as CD-R, Zip or Tape. Keep a recent copy off-site, like in a safe deposit box. Using a compression program such as StuffIt or WinZip a datafile archive can be shrunk to 20%-25% of its full size. Never keep more than one uncompressed data file on your hard disk. Lost data could result from any confusion.

• Avoid creating duplicate records.

• Did we forget to mention? Back up your datafile regularly. On Macintosh the datafile is named Book'em!.data, on Windows it's Book'em!.4DD.