

# **SWS 99s Online Meeting Registration** **Documentation**

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## **Introduction**

Southwest Section Meeting is web-based software that empowers you to manage event registrations and analyze results. The web application (a series of programs that function in a web browser) is designed to provide an up-to-date management system, and to distribute the meeting management workload. Multiple users (committee chairs) can access the reports, and request special reports for the event. The event chair manages access by provision of the [single] user id and password. All data is kept in this password-protected environment, to ensure against easy hacking. This ability to access real-time data for the event, by individual committee chairs, frees the registration committee from providing custom reports and responding to a host of questions.

The application does not store any user financial information. That is handled at the credit card institution. This guards against identity theft, and will encourage your membership to use credit cards for registration. This in turn will simplify your bookkeeping.

The application is broken into two interfaces: First is the public facing interface. This includes the attendee registration, general information pages, schedule and links. It also includes the vendor registration option. Additional information can be added as a separate page, with entry on the navigation panel, or removed if it is not relevant to the event. Second are the Administrative pages. These include various reports and edit functions. These pages are only available with a user id and password. The navigation panel provides access to these additional functions, upon login. There is no public-facing link to these pages. They must be bookmarked separately.

**NOTE** - For a comprehensive guide to 99s meeting preparation, contact [webmaster@sws99s.com](mailto:webmaster@sws99s.com). This guide was developed for web-based and non-web-based meetings, and covers the gamut of committees, how-to's, check-lists, etc.

- Log in, create a custom event site and send e-invites.
- Send follow-up emails to update information for registrants.
- See real-time registrations whenever you want.
- See sub-reports by chapter, user, transportation type, tour selection and more.
- Get rich, visual reports about your event.
- Get Insights Fast.
- Customize your event website and e-invites with your logo and persuasive messages.
- A special URL will be created for your event.
- Send registrants through your payment gateway (Google, PayPal or other).

## **Features**

- Several pre-programmed reports are already available.
- Custom reports available upon request.
- Print the badges with details such as dinner choice, tour choice
- Download and Print spreadsheets of various reports
  - Tour lists
  - Dinner lists

- BUT – to make this work, all registrations must be entered into the database via the online system
  - Encourage attendees to enter their data instead of using a printed registration form
    - One way – accept checks at the previous meeting, but give each registrant the online link, telling them to officially register. They get the pre-registration price, but have to go online to complete the registration process.
    - Send a broadcast email to the prospective attendees. Announce registration one to two weeks ahead of the next meeting and offer the pre-registration price from then through a week after that meeting.
  - Paper registrations are entered by the registration committee.

Broadcast emails are available in two formats. Send emails directly to all registered attendees, to update them about the meeting plans. You can also send a pre-written email to the Southwest Section webmaster, for distribution to the entire SWS 99s list. This requires special list software, because of the size of the list. These broadcast emails have proved useful in both informing the attendees, and in generating additional registration for the meeting.

NEW – Silent Auction management. Enter the details for each auction item. Print out the auction sheets for each item. Update the database with the name of the winner and the final bid price. For auctions that use numbers instead of names, print unique user numbers right on the badge.

NEW – Assign seats at the banquet, to encourage mixing and meeting new friends. Seat assignments by table can be printed directly on the badge.

## Getting Started

- Plan - Use the online questionnaire to set up the new registration site
- Execute - Checks and Credit Cards
  - Set up bank account – see treasurer SOP later in this document.
  - Set up merchant account with PayPal, Google or other
- Report
  - Print to paper
  - Save as Excel spreadsheets
  - Save as archive for your section meeting
- Ask for help! mdkenney@yahoo.com

The screenshot shows a website for the "RAILS TO ROCKETS SOUTHWEST SECTION MEETING" held from September 25-28, 2008, in Ogden, Utah. The page is framed by a blue border. At the top, there are two circular logos: "RAILS TO ROCKETS" on the left and "SOUTHWEST SECTION" on the right. The main content area is white with a blue border. On the left side, there is a vertical navigation menu with links: HOME, Highlights, On-Line Registration, Schedule, General Information, Sponsors and Friends, Seminar Details, Tour Details, Local Maps, Fun Stuff, Useful Links, Vendor Registration, and Print Version of Registration Form. The central content area features a compass rose logo at the top, followed by the text: "Fall 2008 Southwest Section Meeting Ogden, UT", "Hosted by Utah Ninety Nines", "9/25/2008 to 9/28/2008", "Electronic Registration Deadline - 9/15/2008", and "FINAL REGISTRATION DEADLINE September 20, 2008". Below this, a note states: "Note: 99s members may attend the business meeting ONLY, without regular registration. Please email the hosts, to provide accurate count for meeting seating." At the bottom of the central area is another circular logo for "SOUTHWEST SECTION". The footer contains "Contact Information: Webmaster: Maureen Kenney, Southwest Section" and "Last Updated: April 26, 2008".

Figure 1. Website home page with user navigation on left side

# Registration Process

9/25/2008 - 9/28/2008

HOME  
[Highlights](#)  
[On-Line Registration](#)  
[Schedule](#)  
[General Information](#)  
[Sponsors and Friends](#)  
[Seminar Details](#)  
[Tour Details](#)  
[Local Maps](#)  
[Fun Stuff](#)  
[Useful Links](#)  
[Vendor Registration](#)  
[Print Version of Registration Form](#)

Items marked by \* are required fields.

\*First Name:  \*Last Name:

Name on Badge:

\*Address:

\*City:  State: CA

\*Zip Code:  Country: USA

\*Telephone:

\*Email:

\*Chapter: Alameda County

\*99s Renewal Date: mm/yy

49 1/2 or guest name:

Check all that apply:

First Section Meeting	<input type="checkbox"/>	Chapter Chair	<input type="checkbox"/>
Section Officer	<input type="checkbox"/>	Future Woman Pilot	<input type="checkbox"/>
Int'l Board	<input type="checkbox"/>	Position	<input type="text"/>
Past Int'l Pres	<input type="checkbox"/>	Years	<input type="text"/>
Past SWS Gov	<input type="checkbox"/>	Years	<input type="text"/>

Continue CLEAR FORM

Contact Information:

Figure 2. Registration Page 1 of 3 – Personal Information

You did not fill in a required field.  
 Use the back button to return to the registration form and complete the missing information.

**Registration Page 1 Error Message – enforces data entry in required fields.**

9/25/2008 - 9/28/2008

HOME  
[Highlights](#)  
[On-Line Registration](#)  
[Schedule](#)  
[General Information](#)  
[Sponsors and Friends](#)  
[Seminar Details](#)  
[Tour Details](#)  
[Local Maps](#)  
[Fun Stuff](#)  
[Useful Links](#)  
[Vendor Registration](#)  
[Print Version of Registration Form](#)

Personal Information - Transportation

Day of Arrival: Monday  ETA: 9 am - 10 am

Day of Departure: Monday  ETD: 9 am - 10 am

Flying to SWS Meeting: No  I am the PIC: No

Type of Aircraft: na  N Number: na

# of Passengers: 0  Passenger Names:

Flying Commercial: Yes  Airport: ---

I am driving: No  I am Planning to rent a car: No

Continue CLEAR FORM

Contact Information:  
 Webmaster: Maureen Kenney, Southwest Section  
 Last Updated: April 26, 2008

**Registration Page 2 of 3 Travel Plans – Provides data for resource planning such as need for transport from a commercial airport and need for tie-down space at the local airport.**

Personal Information - Events :

<b>Registration:</b>	
Registration includes transportation from OGDEN airport, (transportation from SLC on your own) goody bags, the Fly Market & Silent Auction, Hospitality Room and Educational Seminars, Friday Buffet at Union Station, Saturday breakfast, and Saturday Banquet.	<input type="radio"/> \$128 Pre-Registration postmarked by 05/10/08 <input type="radio"/> \$135 Early - Postmarked by 07/12/08 <input type="radio"/> \$145 Regular - postmarked by 08/23/08 <input checked="" type="radio"/> \$150 Late - by 08/15/08 <input type="radio"/> \$80 Saturday only <b>Registration closes Sept 20, 2008</b>
<b>Check Number:</b> You may pay by credit card. See confirmation page for details.	<input type="text"/>
<b>Tour</b>	
	<b>Name and Quantity</b>
<b>Friday -</b>	<b>Brunch at Snowbasin Resort: \$50</b> <input type="text"/>
<b>Saturday -</b>	<b>Hill Air Force Base Museum: \$15</b> <input type="text"/>
<b>Seminars</b>	
	<b>Quantity</b>
FAAST-Bryan Neville, FAA Safety Team	<input type="text"/>
Annella Earhart Scholarship Information Session- TBA	<input type="text"/>

Friday Night Dinner for Guest (\$32 ea):	<input type="text"/>
Saturday Breakfast for Guest (\$25 ea):	<input type="text"/>
Saturday Night Dinner for Guest (\$40 ea):	<input type="text"/>
Saturday Dinner choice For YOU.	<input type="radio"/> Grilled Chicken & Sun-dried Tomato <input type="radio"/> Macadamia Crusted <input type="radio"/> Halibut <input type="checkbox"/> Vegetarian available on request
Saturday Dinner choice For GUEST	<input type="radio"/> Grilled Chicken & Sun-dried Tomato <input type="radio"/> Macadamia Crusted <input type="radio"/> Halibut <input type="checkbox"/> Vegetarian available on request
I will need transportation to Union Station for the Friday evening program (2 block walk)	<input type="radio"/> Yes <input type="radio"/> No

JRM

**Registration Page 3 of 3 Registration Details that are usually specific to the current section meeting.**

- This includes
  - the price of registration,
  - what is included in the registration price
  - Tour options and cost
  - Optional – seminars if the host chapter is tracking planned attendance
  - Check number when paying by check
  - How many guests will attend each planned meal event
  - What dinner choices are made for Saturday Banquet
  - Special needs options – custom field
  - Choices for meeting mementos, such as t-shirts

**Ogden Marriott Hotel SWS Meeting Registration Confirmation**  
**2008Fall - 9/25/2008-9/28/2008**

Print this page as your receipt. Send your check to the address at the bottom of this page. Or use the Credit Card link to pay now.

Name: bbb ccc  
 Name on Badge:  
 Chapter: Alameda County  
 Address: 12777 Michale Rd  
 City: Caliente  
 State: CA Zip Code: 93908  
 Country: USA  
 Telephone: 1234567890  
 Email: mm@mm.com  
 Chapter: Alameda County  
 Renewal Date: 09/08  
 49 12 or guest: 88888

Billing Name: bbb ccc  
 Registration Amount: \$150  
 Check Number if applicable:  
**Total Amount Due: \$150**

Number of Dinners on Friday (Guests - \$32): 1 - \$0  
 Number of Breakfasts on Saturday (Guests - \$25): 1 - \$0  
 Number of Dinners on Saturday (Guests - \$40): 1 - \$0  
 Saturday Dinner choices: Member - a  
 Guest - b

Tour 1 - Brunch at Snowbasin Resort: Num = 0 - \$0  
 Tour 2 - Hill Air Force Base Museum: Num = 0 - \$0  
 I need transportation to this event: Fri Buffet -  
 Seminar - I registered for these seminars: Num =,

Day of Arrival: Monday ETA: 9 am - 10 am  
 Day of Departure: Monday ETD: 9 am - 10 am

Day of Arrival: Monday ETA: 9 am - 10 am  
 Day of Departure: Monday ETD: 9 am - 10 am

Flying to SWS Meeting: No I am the PIC: No  
 Type of Aircraft: na N Number: na  
 # of Passengers: 0

I am Flying Commercial: Yes Airport: na

I am driving: No I am planning to rent a car: No

Make Checks Payable to: Utah Ninety Nines  
 or  
 Mail to: Carolyn Clarke  
 4983 S Eastridge Ln #194  
 Salt Lake City UT 84117-5756



If your plans change contact  
 Carolyn Clarke - cclarke@xmission.com  
 Janna Vail - (435) 723-0787

Walk-in Registration  
 Subject to available  
 materials and meals.  
 If your plans change, please call Janna - (435) 723-0787 or  
 email cclarke@xmission.com

Cancellation Policy:  
 Full refund if cancellation is before 9/15/08  
 No refunds on cancellations after September 9/15/08

**Registration Confirmation and Receipt – one page that summarizes the registration for this attendee. It is here that the attendee may access the credit card program, to pay by credit card.**

## Flymart Registration

The Fly Market will be open 10am-5pm on Friday and 12pm-5pm on Saturday. All goods and materials must be removed from the area by 5:30 pm on Saturday.

Location: **Ogden Marriott Hotel**

Use	Description	Cost	Selection
Chapter	Chapter Benefits from proceeds.	\$20	<input type="radio"/>
Personal	For personal use by a chapter member.	\$30	<input type="radio"/>
Business	Commercial, non-99s-owned business.	\$35	<input type="radio"/>

Table Cost:

Specify Number of Tables:

Name:

Chapter:

Description of Product(s):

Address:

City:

State:

Zip:

Phone:

Email:

Fax:

**Flymart Registration – Upon submit, the next page includes a confirmation receipt and a button for payment by credit card.**

The options for the Flymart are set up in the beginning questionnaire.

## **General Information Pages**

As can be seen on the user navigation panel, there are provisions for several informational pages.

Among these are tour descriptions, seminar descriptions, things to see and do in the area, maps of the airports and the area, and highlights. These pages can be defined in the content management setup pages.

The schedule for the meeting can be defined in a content management page. See **Setup** for more information.

.....
<b>Highlights</b>
<b>On-Line Registration</b>
<b>Schedule</b>
<b>General Information</b>
<b>Sponsors and Friends</b>
<b>Tour Details</b>
<b>Seminar Details</b>
<b>Local Maps</b>
<b>Fun Stuff</b>
<b>Useful Links</b>
<b>Vendor Registration</b>
<b>Print Version of Registration Form</b>
<b>Administration Reports</b>
<b>Meeting Setup</b>
<b>Ad Request for the banquet program</b>
<b>Ad List</b>

## Administrative Functions

Admin functions include entry and editing of attendee registrations, recording of attendee payments in a format that is useful for the treasurer, tracking membership status to provide a list to the registration table.

## Administration Navigation panel.

This includes all links available on the user panel, but adds setup, reports and a way to track sale of ads for the banquet program.

## Setup

### Southwest Section Meeting Setup

<a href="#">Begin Registration Information Input</a>
<a href="#">Tour Information Input</a>
<a href="#">Seminar Information Input</a>
<a href="#">Links of Interest Input</a>
<a href="#">Maps of Interest Input</a>
<a href="#">Points of Interest Input</a>
<a href="#">Sponsors List Input</a>
<a href="#">Schedule Setup</a>

[Return To Meeting Admin and Reports](#)

**The menu for setup includes all of the information for the General Information links, as well as for registration.**

The following pages provide illustration of several of the setup pages.

**Set up meeting registration pages.**  
**You may use simple html to format information in text boxes (<b>, <br>, <hr>)**

Question	Answer
Venue - Address, City, State, zip	247 24th Street Ogden UT 84401
Venue - Hotel or Resort	Ogden Marriott Hotel
Host Chapter(s)	Utah Ninety Nines
Year	2008
Start Date	9/25/2008
End Date	9/28/2008
Electronic Registration End Date	9/15/2008
Spring or Fall or Winter Board	Fall
Registration Information (see Example)	Registration includes transportation from OGDEN airport, (transportation from SLC on your own) goody bags, the Fly Market & Silent Auction, Hospitality Room and Educational Seminars; Friday Buffet at Union Station, Saturday
Hotel Information (see Example)	The Ogden Marriott is located within walking distance of numerous attractions. Rates for 1-4 people are \$85.00 per night plus 11.7% tax (currently). Hotel parking is free. The hotel offers
Meals (See Example)	Friday evening: Walk 2 blocks along Historic 25th Street to restored Union Station for no-host cocktails and a buffet. Saturday: breakfast at the Marriott. Saturday: lunch on your own. Nearby 25th Street offers a
Transportation (See Example)	Free van service is available to and from the Ogden Airport. Budget Car rental is located in the Ogden Terminal. NO Free Transportation will be provided from Salt Lake City Airport. SLC has all major car rental companies. Shuttle and
Local Weather	Late September in Utah is likely to be sunny, with temperatures in the 50s & 60's, but there's always the possibility of a snowstorm, particularly in the mountains. The mountain foliage should be colorful. Plan to bring a
FBO Information (Be as complete as possible)	Fly into OGDEN Airport (Hinckley Field) Park at Cornerstone Aviation ( a 99 owned business) Overnight parking is free. Please bring your own tiedowns. <a href="http://www.cornerstoneaviation.com/locations.htm#ood">http://www.cornerstoneaviation.com/locations.htm#ood</a>

**Begin setup by answering these questions. You may use html tags to customize the lists and paragraphs.**

Flymart Information (Include days, times, closing instructions)		From: <input type="text" value="10am"/> <input type="text" value="5pm"/>
Friday Hours		From: <input type="text" value="12pm"/> <input type="text" value="5pm"/>
Saturday Hours		
Flymart Table Cost	Chapter	<input type="text" value="20"/>
	Personal - 99s member	<input type="text" value="30"/>
	Non-99s business	<input type="text" value="35"/>
Meeting Registration Contact Information (See example at bottom of link page) For change of plans, further information, etc. Include name, address	Carolyn Clarke  4983 S Eastridge Ln #194  Salt Lake City UT 84117-5756  	
Registration Phone	<input type="text" value="Janna - (435) 723-0787"/>	
Registration Email	<input type="text" value="cclarke@mission.com"/>	
FlyMarket Contact Information (See example at bottom of link page) Include name, address	Carolyn Clarke  4983 S Eastridge Ln #194  Salt Lake City UT 84117-5756 	
Flymarket phone	<input type="text" value="(801) 479-6787"/>	
Flymarket email	<input type="text" value="lhope@konnections.com"/>	
Private Airport IDs	PID1	<input type="text" value="KOGD"/>
	PID2	<input type="text" value="KSLC"/>
Commercial Airport IDs	CID1	<input type="text" value="KSLC"/>
	CID2	<input type="text"/>

**Contact information for the meeting. Flymart prices are input here, too, along with Flymart hours.**

Registration Prices	
Pre-Registration	128 <input type="text"/> end date 05/10/08 <input type="text"/>
Early	135 <input type="text"/> end date 07/12/08 <input type="text"/>
Regular	145 <input type="text"/> end date 08/23/08 <input type="text"/>
Late	150 <input type="text"/> End Date 09/15/08 <input type="text"/>
Saturday Only	80 <input type="text"/>
Banquet	
Enter up to three dinner choices. One should be veggie.	
Dinner Choices	1 Grilled Chicken & Sun-dried Toma 2 Macadamia Crusted Halibut 3 Vegetarian available on request
Banquet Cost for guest	40 <input type="text"/>
Friday Dinner Cost for guest	32 <input type="text"/>
Saturday Breakfast Cost for guest	25 <input type="text"/>
Banquet Speaker or Entertainment	TBA <input type="text"/>
Speaker Bio or Entertainment Description	----- <input type="text"/>
Subject	<input type="text"/>
Refund Policy	Full refund if cancellation is before 9/15/08 No refunds on cancellations after September 9/15/08
Credit Card Acceptance	Google <input type="text"/>
Moments (T-Shirt, vest, etc) Description, available sizes, and cost	None <input type="text"/>
Meeting Logo - upload jpg or gif	TBD <input type="text"/>
<input type="button" value="Submit"/>	

**Registration prices, dates that apply to the prices. Also include refund policy here.**

Setup Organizations and Links of Interest

Organizations of Interest		Web Links	
Host Chapter	Utah Ninety Nines	Web Link	<a href="http://www.utahninetynines.org">http://www.utahninetynines.org</a>
Co-Host Chapter or other link of interest	Local Weather	Web Link	<a href="http://www.wunderground.com/US/">http://www.wunderground.com/US/</a>
Southwest Section	Southwest Section	Web Link	<a href="http://www.sws.org">http://www.sws.org</a>
International 99s	99s International	Web Link	<a href="http://www.ninety-nines.org/">http://www.ninety-nines.org/</a>
Link5	Ogden Airport	Web Link	<a href="http://www.aimav.com/airport/KOG">http://www.aimav.com/airport/KOG</a>
Link6	Salt Lake City Airport	Web Link	<a href="http://www.aimav.com/airport/KSLC">http://www.aimav.com/airport/KSLC</a>
Link7	Cornerstone Aviation	Web Link	<a href="http://www.cornerstoneaviation.com">http://www.cornerstoneaviation.com</a>
Link8		Web Link	
<input type="button" value="Submit"/>			

**Links of interest to attendees. This page is similar to the pages for maps links and points of interest.**

Setup Meeting Schedule

Schedule item	<input type="text"/>
Where	<input type="text"/>
Schedule Time	start - end <input type="text"/>
Schedule Day	Thursday ▼
Schedule Position	0 <input type="text"/>
<input type="button" value="Add Another"/>	

**Schedule for the meeting.**

As you add a new item, it is displayed in the list at the bottom of the page. Include an index number for sorting the items. You can return to this page and edit the schedule as the meeting plans evolve.

Activity	Time	Day	Where	Position	Edit
Registration open	3:00 p.m. - 6:00 p.m.	Thursday	Lobby of Ogden Marriott Hotel	1	<a href="#">Edit</a>
Dinner on your own	6:00 p.m.	Thursday	Restaurants on Historic 25th Street.	2	<a href="#">Edit</a>
Registration open	9:00 a.m. - 6:00 p.m.	Friday	Lobby of Ogden Marriott Hotel	4	<a href="#">Edit</a>
Hawaii International Conference Meeting	7:30 p.m. - 9:30 p.m.	Thursday	Ogden Marriott Hotel - TBA	3	<a href="#">Edit</a>
Brunch at Snowbasin Resort	9:45 a.m. - 2:30 p.m.	Friday	Meet in Lobby of Ogden Marriott Hotel	5	<a href="#">Edit</a>
Fly Market	10:00 a.m. - 5:00 p.m.	Friday	Ogden Marriott Hotel	6	<a href="#">Edit</a>
Hospitality Room and Silent Auction	10:00 a.m. - 5:00 p.m.	Friday	Ogden Marriott Hotel	7	<a href="#">Edit</a>
SW Section Board of Directors Meeting	2:30 p.m. - 3:45 p.m.	Friday	Ogden Marriott Hotel	8	<a href="#">Edit</a>

### Setup Tours

Tour1 Title	<input type="text"/>
Tour1 Description	<input type="text"/>
Tour1 Cost	<input type="text" value="000.00"/>
Tour1 Day	Thursday ▼
Tour1 Depart Time	8:30 am ▼
Tour1 Return Time	8:30 am ▼
Tour Include (eg Lunch)	<input type="text"/>
<input type="button" value="Add_Another_Tour"/>	

Tour Name	Tour Description	Cost	Departure	Return	Day	Included	Edit
Hill Air Force Base Museum	See military aircraft, missiles, and aerospace vehicles, aerospace ground equipment, military vehicles, uniforms, and thousands of other historical artifacts.	15	1:30	3:30	Saturday	Museum and Transportation	<a href="#">Edit</a>
Brunch at Snowbasin Resort	Enjoy fall foliage, brunch and a gondola ride at Snowbasin Resort. Transportation will be in Snowbasin owned coaches.	50	9:45	2:30	Friday	Transportation, brunch and gondola ride...	<a href="#">Edit</a>

**Tour list setup** As with the schedule, the list increments as you add each item. The Seminar list is the same kind of page as the tour setup page.

### Reports

The reports provide instant access to data about your meeting. One of the most useful reports will be the attendees list. Here, you can view the registration information for an attendee in a concise format. You can also edit the attendee information. Among the most useful edit functions is the status change. When an attendee needs to cancel, this function removes the person from lists and reports, but keeps them in the database, and on the master spreadsheet, for accounting purposes. You will want to track such things as refunds, and may include notes about the transaction.

## Editing the status of a registrant

### 1. choose the first report

**SWS Reports**

1. Who is planning to attend the Section meeting?
2. Who is attending from each chapter?
3. How many members are attending from each chapter?
4. Who has paid the registration fee?
5. Who is current for International dues?
6. Who ordered what T Shirt Size?
7. Who gets what ribbon on her badge?
8. I need a spreadsheet of all registration information.

Transportation      Airports - Commercial airports  
Rental Cars

### 2. Select edit at the end of the row for the specific user.

Hurley, Mari	Imperial So-Lo	769-352-6496		2/6/2008	EDIT	View
Hutson, Christina K.	Coachella Valley	818-489-0913	christinahutson@msn.com	2/12/2008	EDIT	View
Ingham, Leslie	Santa Clara Valley	408-238-6568	gardei@sbcglobal.net	2/7/2008	EDIT	View
Johnson, Marjorie R	San Gabriel Valley	408-243-2098	marjohnson89@earthlink.net	2/7/2008	EDIT	View
Kenney, Maureen	San Fernando Valley	818-207-6089	mdkenney@yahoo.com	2/7/2008	EDIT	View
Kent, Annemarie	Mount Diablo	707 428 6033	aeKent99@aol.com	3/26/2008	EDIT	View
Kirhofer, Jeanne	San Fernando Valley	(818)790-3208	kirhofer@sbcglobal.net	2/14/2008	EDIT	View
Knight, Cheryl	Mount Shasta	530-335-3702	cnight@citlink.net	4/2/2008	EDIT	View

### 3. Select the status drop-down arrow, and reset to cancelled.

details

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on

ion of on Form

ation Reports

\*Zip Code: 93518      Country: USA

\*Telephone: 818-207-6089

\*Email: mdkenney@yahoo.com

\*Chapter: San Fernando Valley      ----

\*99s Renewal Date: 9/08

**Intl Membership Current?** Only enter Yes in this field when it is certain that the status will not change before the SWS meeting.

49 1/2 or guest name:

Special: Section Officer

Int'l Board:

Attend Status: Active

Notes:

Continue      CI FAR FORM

## Badges

# Name Badges Template

Document tours

Meeting Logo

**My Name**  
Position or **Guest or FWP**  
**Chapter**

Chicken - Tours: **BusTrip** **WineTaste** Shopping

banquet meal choice

Name Badges (5392)


4" X 3"

6 Cards Per Sheet

600 cards = \$14.89

[http://www.compuforms.com/ij\\_badge.htm](http://www.compuforms.com/ij_badge.htm)

Lanyards: <http://lanyardsupply.com>

Name badges and all information is printed from database direct to badge.

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Instructions for printing member badges (Note: another set of files will be used to print guest badges, but the instructions will be the same as these).

You need to be online during this process, until the badges start to print.

1. Online under Administration Reports Badges Section right/bottom of the screen. Right Click on the file name "Member Badge Spreadsheet". A new pop up screen will appear. Select: Save Target AS and put it on your desktop.
2. Check to see if it downloaded correctly, by opening it.
3. Close it.
4. Online under Administration Reports Badges Section right/bottom of the screen. Right Click on the file name "Member Badge Template". A new pop up screen will appear. Select: Save Target AS and put it on your desktop. That is your Word File.
5. Go to the desktop and open the Word File "Badges" that will now be on your desktop. On the Menu bar at the top of the screen Select: Tool; Letters and Mailings; Mail Merge.

6. Right side under Document Type Select - Letters and then at the bottom Select - Next: Starting Document (1 Of 6 steps)

7. At the bottom again Select - Next: Select Recipients (2 out of 6 steps)

8. Select: Browse. Open the "Member Badge Table", that is the spreadsheet that is on your desktop. The entire file should open. (Step 3 of 6)

9. Click on Entire Spreadsheet

Click OK on Spreadsheet. You might get some funky screens before the spreadsheet opens; just click OK to any of them. Be patient it takes a bit of time for the spreadsheet to load.

The document should now be showing a page of labels.  
A list of recipients will appear.

10. At the bottom right again, Select - "Write your letter" then  
Select "Preview your letter" (Step 4 of 6)

11. On the Preview your letter screen at the bottom Select- Complete the Merge; then, Edit individual Letters; new screen, Merge ALL  
Click OK.

12. There! Now you have your sheets of labels for printing! You can save these to a new document/file name, and print at your convenience.

Notes for guest badges - when the excel spreadsheet opens, Select the arrow in the M\_49\_12\_or\_guest title box. A drop-down menu of choices will appear. Select "non blanks" Now your list is limited to only records with a guest in attendance with a member. This means fewer badges to print!?

- Tour Accounting - Collecting tickets? No More!
  - Use checklist of names signed up for tour
  - Check them off as they get on the bus, and off the bus
  - List can be printed from the database reports
- On-site Registration Options
  - Print a badge after entering the registration information
  - Hand-write a badge
    - Approximate the printed badge using colored pens with fine points
  - Remember – always add the registrant to the database. This will make after-meeting accounting a breeze!

### **Requesting special features**

Email [mdkenney@yahoo.com](mailto:mdkenney@yahoo.com)

## **Reporting bugs and problems**

Email [mdkenney@yahoo.com](mailto:mdkenney@yahoo.com)

## **SWS Event Treasurer**

Open a local Bank Account

- a) Open a local account in your Chapter's name for the Section Meeting financial business.
- b) Request a no fee account because of our non-profit status. We are a 501c-3 corporation.
- c) Bring a copy of the **"501" Internal Revenue** letter describing our tax exempt status. This letter is date March 5, 2004 and should be available through HQ. This is the Federal IRS 990 tax form (IRS Letter of Determination declaring your Chapter has 501c 3.
- d) Bring a list of the officers on your Chapter's stationary. Bring as list of the officers and their addresses who will be responsible for this running event.
- e) You and your Chapter treasurer should sign up for handling the account and both should have check signing privileges. If you are the Chapter treasurer than have the Chapter Secretary as the second one to sign checks.
- f) The Event Treasurer and Chapter Treasurer should be listed on the signature card for the account. A signature card will be sent to the Chapter Treasurer or Chapter Secretary for an authorized signature.

Retain copies of this information. You will need it later.

### **Work with the SWS Webmaster to:**

Open a credit card account to processes registration payments on line. Fees vary for this service. Once you determine what site to use, have the information above handy. Log on to the credit card site and fill out the necessary paperwork. Keep a copy of everything. Write down your log on name and password. Be sure to advise the webmaster what you log one name and password are so that she has access to this.

Gain entry to the SWS Event Registration site. This is done through the SWS webmaster, Maureen Kenney. Again, record the process you will be using.

Prepare the budget for this event with your committee. Good idea to put it in Excel. Have all bills and receipts submitted to you before reimbursement is made. Keep these records for you accounting.

### **Records to Keep**

All original registration forms received and any notes received or made. This should be your working file. I used two 2" binders. They were chuck full at the end. Date the registration when it was received. No registration is complete until the money is received. I would recommend recording the registration until you have received the money. Some people sign up on line and send a check later. It could be a month or two later or they wait until the very last minutes to commit. This hangs you up and makes life difficult if the numbers are at maximum or close to it. Bring these to the meeting incase there are any issues that come up so that you have the paper trail with you.

Print a final copy of the paid reservation. I put these in four smaller binders for the registration people to be able to process the registrant quickly and easily when they arrived at the meeting.

### **Bank Records**

Send monthly reports to the key people on the committee who are running the meeting.

Bank Deposits list the land name and first initial and the check number on the deposit slip where you list each check. It is a wonderful crosscheck of what has happened.

Record the individual check number in the database. If the person pays on line print out a record of their transaction and staple it to your working copy on the individual record. Also record Google or PayPal in the individual record where you put the check number.

Keep deposit slip. Tap them on paper (six to a sheet) for your paper trail.

### **Renew Date Information:**

There will be a database available to you that the webmaster has. Download it to your desktop. Check the renew date of each member and record it in the appropriate place in the registration database for each individual. I wrote the "RD" date on the original registration form. It should be recorded as 09/08.

### **Printing Badges and Envelope Labels**

Download the Spreadsheet and the Word list from the database online. See the separate Instructions for this.

### **Supplies:**

Avery 2" x 4" labels for envelopes. This will have the individual complete registration information on it.

Name tags: I used 8 1/2" x 11" card weight paper. Six name tags printed out per sheet. Then cut them with a paper cutter. I thought this would take forever, but it went very fast and was easy to do. Replacement Name tags for the badge holders only come with the original box. Using card stock was cheaper and as I said easy to do.

### **Timing:**

Wait until the week before the event to download the files from the database so that you get the most up to date information. It will save time in the end. Any new or replacement items will need to be done separately. I copied the format and save just one page in a file for the name tags and the envelopes. Then input the information as needed.

Complete the budget report before the meeting so that you have the information for the debriefing meeting which is held on Sunday morning early at the end of the weekend. The final accounting is due about two weeks after the meeting. The profit should be calculated; the percent sent to the Section Treasurer. File your final report with the hosting Chapter (s) and the Section treasurer and Governor. Close the bank accounts and celebrate a job well done!

Database Instructions:

**Edit Payment or Delete a Registered Person who is not coming.**

Select the Who has paid? report.



Follow these instructions (which now appear at the top of the report!)

SWS Meeting Registration List - Who has Paid?

Instructions: To edit the payment status, click on the amount due for that person. A form about payments and a space to add notes will appear.

How can I track my payout balance in Google?

You can track your payout balance at any time on your Payout Summary page. To access your Payout Summary page, [sign in](#) to Google Checkout, then click the **Payouts** tab.

The screenshot shows the Google Checkout interface. At the top, there are tabs for 'Orders', 'Payouts', 'Tools', and 'Settings'. Below the tabs, there is a navigation bar with 'Inbox (14)', 'Archive (0)', 'Reviews', and 'Search'. A message reads: 'How to process an order: 1. Review order 2. Charge the customer 3. Ship and confirm the order Learn more...'. Below this is the 'Inbox' section with a search bar and a table of orders.

Order Number	Total	Delivery	Chrg	Ship	Action	Buyer - Items	Sale Date
<a href="#">440387128252395</a>	\$146.00				Ship »	Barbara Crooker - SWS Spring Meeting 08	Feb 27, 2008
<a href="#">146930993611051</a>	\$146.00				Ship »	Anastasia V. Crowther - SWS Spring Meeting 08	Feb 25, 2008
<a href="#">641458702631967</a>	\$146.00				Ship »	Patricia Gregory - SWS Spring Meeting 08	Feb 24, 2008
<a href="#">168112263913318</a>	\$159.00				Ship »	Dolores Blum - SWS Spring Meeting 08	Feb 24, 2008
<a href="#">732604424001308</a>	\$146.00				Ship »	Robin Lawson - SWS Spring Meeting 08	Feb 23, 2008
<a href="#">867911161119083</a>	\$146.00				Ship »	Carolyn E. Clarke - SWS Spring Meeting 08	Feb 22, 2008
<a href="#">402748242011851</a>	\$146.00				Ship »	Lorraine F Elam - SWS Spring Meeting 08	Feb 22, 2008
<a href="#">873812058486835</a>	\$257.00				Ship »	Bessie Hensley - SWS Spring Meeting 08	Feb 13, 2008
<a href="#">431555980643614</a>	\$40.00				Ship »	Laurie M Hope - SWS Flymart Vendor	Feb 13, 2008

**Google report of credit card payments.**

Your payout balance page displays, by date, your starting and ending balances. It also shows your [charged sales](#), [other activity](#), and [payouts](#). By clicking the amounts under the 'Charged sales,' 'Other

activity,' and 'Payouts' columns, you can review each credit or debit to your account and see which order is associated with that activity.