

12 Point Summary of Event Manager Software

1) Event Manager Overview

Event management links people to events and the event details. There is no need to rely on your memory for any details because all registration information is available and accessible at the click of a button.

There are many different reports that can be printed or exported. They range from lists of names to banking forms to exports for other purposes.

Event Manger software is fully multi-user. This allows many people to access the same file and not effect the data or speed of operation. If more than one user wanted to change the exact same piece of data, the software will provide an error message saying that it can't be done.

2) Individual Details

Anything that you would need to track for a single person can be stored here. In addition to name, address and telecom details you can store date of birth, sex, age group etc. You can link a person to a parent or parents and then view a list of siblings.

The screenshot displays the 'Individual' tab in the Event Manager software. The interface includes a navigation bar with tabs for 'Admin', 'Organisation', 'Individual', 'Events', and 'Communicate'. Below this is a toolbar with options like 'Detail', 'List', 'Find', 'Find All', 'New', 'Edit', 'Print', 'Archive', and 'Merge'. The main content area shows the profile for 'Mr Dale Bolst' with contact information: 'PO Box 528, BUSSELTON WA 6280' and email 'dale@designeranswers.com.au'. A list of events is shown, including 'Children's EXPO 2006'. Below the main profile are sections for 'Contact Info', 'Affiliates', 'Family', 'Edit History', 'Messages', 'Receipts', and 'Groups'. The 'Contact Details' section includes fields for Preferred Name, Middle Name, Maiden Name, Sex (set to Male), Marital Status, Spouse, and Age Group. The 'Telecoms' section lists Home, Mobile (0414 630 311), and Email (dale@designeranswers.com.au). The 'Addresses' section shows a Postal Home address: 'PO Box 528, BUSSELTON WA 6280'. The 'Associated With...' section includes fields for Church, Church Imported, University, Course, and Year.

3) Organisation Details

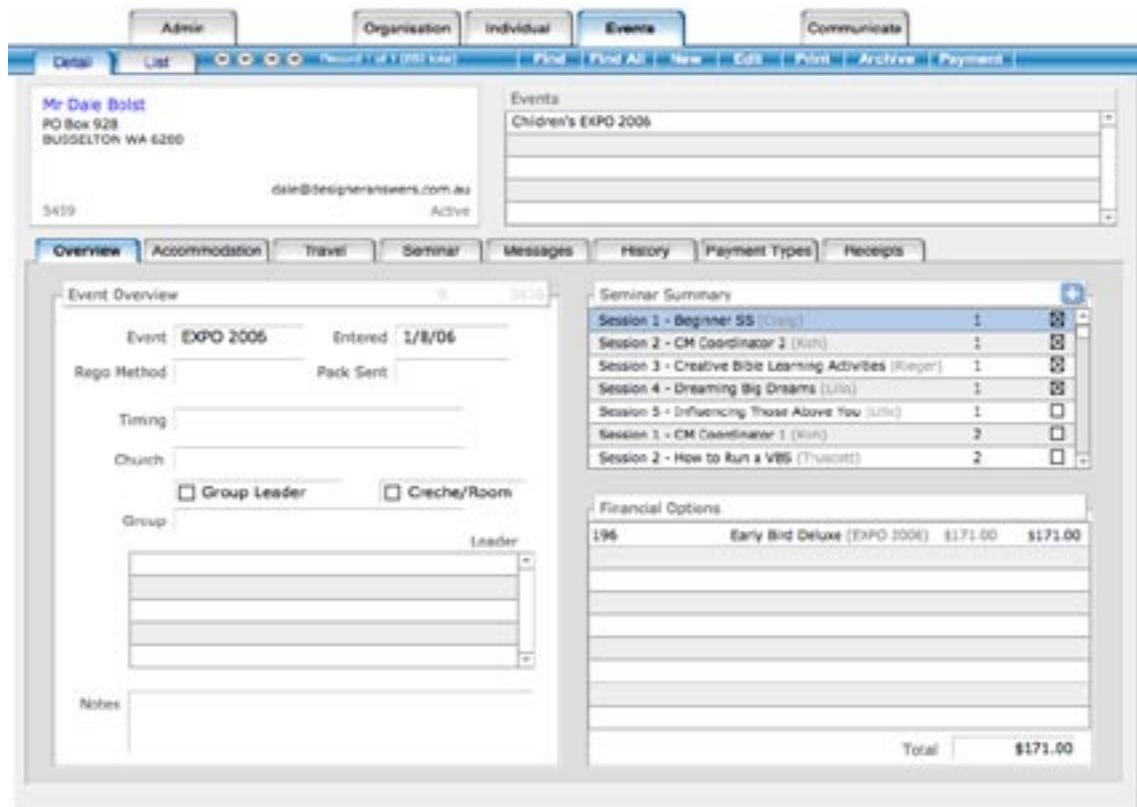
An organisation refers to an entity that is not a person, for example a school or a company. Organisations can be classified, ie School, Church, Vendor etc and then, depending on the classifications appropriate data will be displayed. Each organisation can have its own address and telecom details.

In addition, an individual can be linked to many organisations. The benefit of this is that you can then see all the people who are linked to a particular school or company.

4) Event Details

Events are the primary purpose of this database solution. There are two sections to the Event Details, the data that is stored and the processes to enter an event registration.

- a) Data stored - the event registration details are captured, workshops, accommodation, travel and payments
- b) Processes - these walk you through the registration routine. The event registration details, workshops and payment processing are all tied together in one routine. The final step generates a message that include details from the registration or payment and then it can be emailed or printed off. All this happens in the one routine. It can also happen independently if required.



5) Payment Processing

Payments are broken into three sections; an invoice, the items on that invoice and the receipts against the invoice. This is how it works conceptually, with the different terminology being hidden from the user.

Payments can be processed either during the Event Registration routine or adhoc when needed.

6) Bulk Messages

The term message is used here rather than letter or email. The reason for this is that the same text can be sent via email or via a printed letter.

This tool allows the user to be proactive by sending messages to anyone in the database. Either email or letter and SMS could be used.

7) Individual, Organisation & Event History

One of the key benefits of this *Event Manager* is all the history for individuals, organisations, events, receipts and change of details are tracked. Whenever there is a change of data, automatically in the background a history of what was there previously is stored. This can be viewed in the History section on any of the screens.

8) Message History

Message History allows you to see all the correspondence with an individual or organisation. You can resend/reprint the message or use it as reference when talking with an individual. Message History allows you to know when and to whom a message was sent.

9) High Security Model & Synchronisation

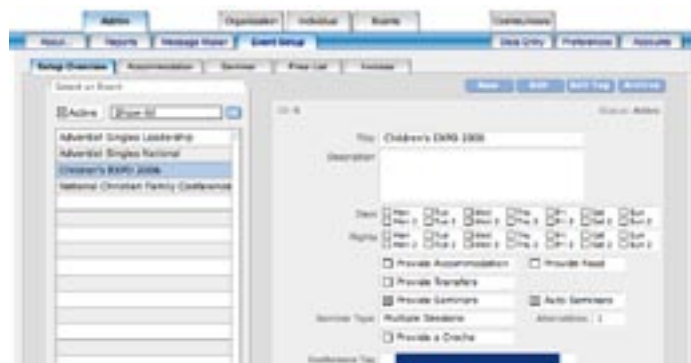
Security should not take second place. The objective of security is to prevent unauthorised access to data, both physically and electronically. The proposed security model would be a user name and password combination that would allow access to areas of the database as required. Privileges to add, change, export and print can all be user specific.

Synchronisation is a way of keeping the databases up to date that are installed in different offices. You may need to keep multiple offices synchronised so changes can be made by someone in one office and it will be updated in all other offices in a timely manner.

10) Customise Your Event

Event Manager has a setup option for each event that you run. You will have the opportunity to customise the requirements for each event. For example you might run an event that requires workshop choices but has no accommodation options.

As part of this customisation you can setup templates for payments, called Invoice Templates. These templates require a price list to be setup, which is a complete list of all the different items you will be charging. These items can then be added to templates, for example, an Early Bird invoice template will have an early bird registration and early bird accommodation options.



11) Technical Support

Designer Answers will be the point of contact for all email and phone queries, complaints or compliments. Technical support is included during the first 12 months free. Maintenance will need to be purchased after the initial period.

Support includes one onsite visit within the maintenance period of 12 months and includes updates to the *Event Manager* software.

It is recommended that a direct network connection be accessible to the FileMaker Server for maintenance and updates. This should be a VPN or other secure type connection over the Internet.

12) Built On FileMaker Inc

Event Manager has been built using the FileMaker Inc suite of software. FileMaker Pro is installed on each users computer. A computer can be either Apple Mac OS X 10.3.9 or newer or Windows 2000 or XP or newer. This is where all interaction with the data takes place, through the interface that *Event Manager* provides.

On the server side, FileMaker Server is used. This allows connection of up to 250 simultaneous users. The FileMaker software handles all the aspects of adding a additional users and sharing data and does this with no slow down of operation.

For FileMaker Server and FileMaker Pro product descriptions or more information visit FileMaker Inc's website at: www.filemaker.com.au.