Table of Contents

Reservations Startup Outline 3
Setting up Activities in Reservations 4
Adding Activities in Reservations 5
Working with Categories in Reservations 7
Editing or Deleting Activities in Reservations 9
Clearing Activities in Reservations 10
Copying Activities in Reservations 11
Printing an Activity Profile Report 12
Refreshing Activity Records in Reservations 13
Working with Reservation Records 14
Adding a Reservation Record 15
Editing a Reservation Record 17
Deleting a Reservation Record 18
Refreshing a Reservations Record 19
Printing an Individual Reservations Listing 20
Reservations Reports 21
Printing Name Badges in Reservations 23

Reservations

The Reservations module is designed to help keep track of people involved in activities, such as youth trips, camp registrations, convention registrations, and supper reservations, scheduled for your church or organization.

In Reservations Setup, you can create new activities or edit default settings for existing ones. After setting up the activity, you add or edit individual reservations, enter any notes pertaining to the individual, or list any payments made in Add/Edit Reservations.

You can also refresh reservations to update the reservations name, address, phone information for the activity selected or all activities, and recalculates sign up count. This option only updates name, address and telephone information for records that are located both in the People and Reservations database.

In addition, you can print a variety of Reservations reports or send a mass e-mail to all individuals registered for an activity or all activities.

Reservations Startup Outline

Here are the basic steps to follow when setting up Reservations:

Gather the information you want to monitor for the activity you want to add. You will need this information:

- Name of the activity
- Dates of the activity
- Locations involved
- Maximum number of attendees allowed
- Whether the activity will be recurring and, if so, how often it takes place
- The coordinator of the activity
- Notes about the activity
- Quantity, Date, and Yes/No field descriptions
- Categories for the activity, and elements of the categories
- Cost of the activity

In Reservations Setup, add the activity.

- Enter the Activity, Dates, Location, and Maximum number attending for this activity
- On the **Coordinator** tab, enter the coordinator information
- On the **Notes** tab, enter any notes pertaining to this activity
- On the **Configuration** tab, select the quantity, date, and yes/no fields you want to use
- On the **Categories** tab, set up the categories for this activity
- On the **Cost** tab, set up the activity costs

In Add/Edit Reservations, add individual reservations.

- On the **Personal** tab, add the individual's name and address information
- On the **Contact** tab, enter emergency contact information
- On the **Notes** tab, enter any notes relating to the individual
- On the **Categories** tab, select the categories and elements pertaining to this record
- On the **Cost** tab, select the costs for this reservation
- On the **Payments** tab, enter any payments received
- Continue adding all records for this activity

Print all necessary reports.

Setting up Activities in Reservations

In the Reservations module, you can add activities and set them up.

Before adding activities, we suggest gathering information about the activity, such as the coordinator, start and end dates, location, and maximum number of participants. This helps you effectively set up your activity so you can track the information you need and don't have to make changes later.

You can also set up activities for recurring events, such as monthly church dinners, and you can copy reservations from one activity to another or clear rosters.

Adding Activities in Reservations

Use the Setup window to enter the activities for which individuals can make reservations.

You can also enter information on the activity's coordinator, enter notes associated with the activity, activate information fields, create activity categories and their elements, and list any costs involved with the activity.

To add activity information

1. Under Advanced Tools, click the **Settings** tab.
2. Select **Reservations** from the drop-down list and click **Go** .
3. Click **Add**.
4. In the **Activity** field, enter the name of the activity.
5. In the **Dates** field, enter the activity's start and end date. You can use **Lookup** to select a date.
6. In the **Location** field, enter where the event takes place.
7. In the **Maximum** field, enter the maximum number of people that can attend.
8. If the activity is a recurring event, select **Recurring**.
9. Set up the following options for the activity:
    - On the **Coordinator** tab, enter any information for the activity's coordinator
    - On the **Notes** tab, enter any notes relating to the activity
    - On the **Configuration** tab, activate fields as you require
    - On the **Categories** tab, enter any categories and elements for the activity
    - On the **Cost** tab, enter the any costs for the activity
10. When finished, click **OK**.

Additional Field Information

Find Coordinator

Click to access the ACS Find Person window. This is a quick way to enter an individual as a contact if they are already in your People database. If not, you can enter the coordinator's information in the fields.

Notes

Use this tab to enter any notes pertaining to the activity. For example, for the Summer Rafting Trip activity, you might enter the time the church van is leaving, whether permission slips are required, the date by which a deposit must be made, and the ages allowed to attend the trip.

Configuration

Use this tab to activate information fields you want to associate with an activity. The descriptions of the fields are user-defined so you can tailor them to your organization's needs. The following field types are available:

- **Quantity** — This field can capture quantity information. For example, if you will be providing meals during the activity, how many have they signed up for?
- **Date** — This field can capture date information. For example, you might want to enter when individuals registered for the activity.
- **Yes/No** — This field can capture information answerable by "Yes" or "No". Enter a question that can be answered by "Yes" or "No" in the description field. For example, if you would like to record whether the person participating in the activity is a member of your church, your Yes/No question could be, "Church Member?"

Categories

Categories are used to group people together, and elements are groups within categories. On the **Categories** tab, you can add, edit, and delete categories and their elements. To learn more, see Working with Categories in Reservations.

Cost

Use this tab to enter any cost information associated with the activity. You can add, edit, and delete cost entries.

- **Default Cost** — The Default Cost is a cost that you can add to an individual record or add to the entire Activity. The purpose for this option is to be able to include another cost without having to list it as a regular added cost. For example: If the cost for a trip is $250.00, which includes the transportation and registration, then $250.00 is the Default Cost. You can then add other costs, like T-shirts, banquet tickets, etc.
- **Maximum Cost** — You can set a maximum cost for an activity. The costs for an individual to participate in an activity will not exceed the maximum cost.
- **Cost** — This area displays any costs other than the default cost associated with the activity. An optional cost, such as a shirt for an activity, can be entered here.

Working with Categories in Reservations

Categories are used to group people together, and elements are groups within categories. Each activity can have multiple categories and elements.

After you map out which categories and elements your activity needs, you can add categories. Then, you can add elements for each category. You can also edit category and element descriptions, and you can delete them if you need to.

Examples of Categories and Elements

In the examples, you could set up an activity for a Wednesday night dinner. Then, set up a category for the volunteers and set up elements for each volunteer task (cooking, setup, and cleaning).

Or, for a youth camping trip, you could set up a category for cabin numbers and element for each cabin.

Activity	Category	Elements
Wednesday Night Dinner	Volunteer	• Cooking • Setup • Cleanup
Youth Camping Trip	Cabin Number	• B15 • B16 • B17

To add a category to your activity

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Reservations** and click **Go** .
3. On the **Categories** tab, under **Categories**, click **Add**.
4. Enter the category description and click **OK**.
5. Click **Add** and enter a category description until all categories are entered.
6. Click **OK**.

To add elements to an activity category

1. Under Advanced Tools, click the **Settings** tab.

2. In the drop-down list, select **Reservations** and click **Go** .
3. Under **Activity**, select the correct activity in the drop-down list.
4. On the Categories tab, under **Categories**, select the category you want to add an element to.
5. Under **Elements**, click **Add**.
6. Enter the description of the element and click **OK**.
7. In the **Elements** box, continue adding elements until all elements you need are added, then click **OK**.

To edit a category or element

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Reservations** and click **Go** .
3. Under **Activity**, select the correct activity in the drop-down list.
4. On the **Categories** tab, select the category or element you want to edit, and click **Edit**.
5. Edit the description as necessary, then click **OK**.

To edit a category or element

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Reservations** and click **Go** .
3. Under **Activity**, select the correct activity in the drop-down list.
4. On the **Categories** tab, select the category or element you want to delete, and click **Delete**. Deleting a category deletes all elements associated with it.
5. When the confirmation message displays, click **Yes**.

Editing or Deleting Activities in Reservations

You can edit a reservation activity's details if something changes.

You can also delete the activity if it was entered in error. Deleting an activity removes all rosters, categories, elements, costs, and payments associated with the reservation group.

To edit an activity in Reservations

1. Under Advanced Tools, click the **Settings** tab.
2. Select **Reservations** from the drop-down list and click **Go** .
3. In the **Activity** drop-down list, select the activity you want to edit, then click **Edit**.
4. Make any necessary changes to the activity's information or on the **Coordinator**, **Notes**, **Configuration**, **Categories**, and **Cost** tabs.
5. When finished, click **OK** to save your changes.

To delete an activity in Reservations

1. Under Advanced Tools, click the **Settings** tab.
2. Select **Reservations** from the drop-down list and click **Go** .
3. In the **Activity** drop-down list, select the activity you want to delete, then click **Delete**.
4. When the confirmation message displays, click **OK**.

Clearing Activities in Reservations

Use the **Clear** option to clear all reservations listed on the roster of a recurring or non-recurring activity. This does not delete the activity itself.

To clear a non-recurring activity

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Reservations** and click **Go** .
3. In the **Activity** field, select the non-recurring activity you want to clear and click **Clear**.
4. In the **Confirm** dialog box, click **OK** to clear the roster.
5. Click **OK**.

To clear a recurring activity

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Reservations** and click **Go** .
3. In the **Activity** field, select the recurring activity you want to clear and click **Clear**.
4. To clear one-time entries and change skip entries to **Retain**, click **Yes**. To clear all records, click **No**.
5. Click **OK**, then **Close**.

Copying Activities in Reservations

You can copy Setup, Categories, Costs, and/or Roster data from one activity to another.

For example, your organization is hosting a missions seminar for two different age groups. You want to set the seminar up as two different Activities, but the Setup, Categories, and Costs are the same for both seminars. You can set up this information for one seminar and then copy it to the second seminar.

To copy activity information

1. Under Advanced Tools, click the **Settings** tab.
2. Select the **Reservations** tab from the drop-down list and click **Go** .
3. In the **Activity** field, select the activity you want to copy and click **Copy**. The Copy Activity window displays.
4. From the **Activity Name** list, select the activity from which you want to copy information.
5. Under **Options**, select the types of information to copy. You can also select **Clear Roster** to clear Roster information from the selected activity.
6. Click **OK** twice.

Printing an Activity Profile Report

After setting up an activity, you can print an Activity Profile Report that lists the activity's details.

The report displays the coordinator, activity details such as start date, end date, and location, and the categories, elements, costs, and notes that you set up.

To print activity information

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Reservations** and click **Go** .
3. In the **Activity** drop-down list, select the activity you want to print an Activity Profile Report for, then click **Print**.
4. When the report displays, click **Print Report** .

Refreshing Activity Records in Reservations

Refreshing records updates the reservations name, address, phone information for the activity selected or all activities, and recalculates your sign up count. The **Refresh** option only updates information for records that are located both in the People and Reservations database.

> **Make a Backup**
>
> We strongly suggest that you create a backup of your data before attempting to refresh your reservations information.

To refresh all records for an activity

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Refresh Reservations** and click **Go** .
3. Select the activities you want to refresh or click **Select All** to refresh all activities.
4. Click **OK**.

Working with Reservation Records

In the Add/Edit Reservations window, you enter an individual's reservations or change an existing reservation or delete reservations that are cancelled or entered in error. You can also enter an emergency contact, notes associated with the individual and the activity, list any costs for the activity, and any payments made.

You can also refresh a reservations record to carry any updates from the individual's People record to the Reservations record.

If you want to view a list of those registered for an activity, in the Add/Edit Reservations window, click **Roster**. You can sort the roster by first or last name. You can also use the arrow keys to scroll through the reservations.

You can also print an Individual Reservation Listing that displays the registrant's name, contact information, emergency contact, notes, costs, and payments associated with the reservation.

Adding a Reservation Record

When an individual or organization signs up for your activity, you can add a reservation record. This adds them to your activity's roster.

To add a reservation record

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add/Edit Reservations** and click **Go** .
3. In the **Activity** field, select the desired activity and then click **Add**.
4. Do one of the following:
   - Click **People** to add a new member or locate an individual from an existing People record in the Find Person window.
   - Click **Organization** to locate an existing Organizations record.
   - Click **Special Mailings** to locate an existing Special Mailings record. You may only add a reservation for records previously entered in Special Mailings with the Special Mailings option.
   - Enter the information directly into the Add/Edit Reservations window to add the record to the Reservations module only. This record is not added to the People database, and an asterisk displays to the left of the last name on all non-member records.
5. On the **Contact** tab, enter contact information by clicking Find Contact to use an existing People record, or entering the contact information directly into the fields.
6. On the **Notes** tab, enter any notes relating to the individual's reservation.
7. On the **Picture** tab, click Import if you want to import a picture for the reservation record.
8. On the **Categories** tab, select the category elements that pertain to this record.
9. On the **Cost** tab, select the costs for this record. Remember that default cost is automatically assigned based on the default cost added in Setup. If you add the default cost after the individual has been added to the activity, the default cost on their previous records will not automatically update. You will have to change them manually.
10. On the **Payments** tab, enter any payments for this record.
11. Click **OK** to accept all entries.

Additional Field Information

Personal

If you selected a record from People, Organizations, or Special Mailings, the individual or organization's information displays on this tab. However, if the individual is not a member, you can enter his or her personal information without adding them to your ACS database.

If the activity is recurring, the **Standing** drop-down list displays. Select the status for the reservation. Retain means the reservation is retained for each occurrence of the activity. Skip means the reservation is skipped, or not counted, for the activity. One Time means the reservation is added for the current occurrence of the activity.

Contact

On this tab, enter the registrant's emergency contact information, or click **Find Contact** to select an emergency contact's record from Find Person.

Notes

Use this tab to enter any notes pertaining to the individual and the activity. For example, if the individual attending the activity is a diabetic and has special nutritional needs, you could record that information.

Picture

You can add pictures to existing Reservations roster records. If the records in the activity are from the People module, ACS pulls their individual picture for use in Reservations. If you choose to update the picture by editing it or select a new image, the changes are applied to the picture tab in Add/Edit Individual in People as well. No family pictures are used.

To configure the picture for editing in a third party package, click **Configure**. To display the program that lets you edit the picture, you must link to the .exe file.

Categories

Use this tab to enter category information pertaining to an individual's reservation. The choices for categories are defined when you set up the activity. For example, if you set up one of the categories to be "Transportation," you could select the individual's transportation type.

Cost

Use this tab to enter cost information pertaining to an individual's reservation.

- **Selections** — This area displays item costs that are associated with the activity, but are not part of the Default Cost. An example would be the cost of a T-shirt that would be an additional cost, not included in the Default Cost for the activity.
- **Default Cost** — The Default cost can be added to an individual record or added to the entire Activity. The Default Cost is the cost of attending an activity. For example, the Default Cost may include registration and meals, but not include the price of a T-shirt.
- **Additional Cost** — This area displays additional costs associated with the activity, such as a T-shirt.
- **Maximum Cost** — Displays the maximum cost for an activity.
- **Total Cost** — Displays the total cost for the individual for the activity. The total cost cannot exceed the maximum cost.

Payments

Use this tab to enter payments that the individual has made towards any reservation costs. To record a payment, click **Add**. You can also click **Edit** or **Delete** to update or delete payments, or you can click **Print Receipt** to print a payment receipt for the registrant.

Editing a Reservation Record

After adding a reservation record, you can edit it. For example, if you add the record and the individual's contact information or emergency contact changes, you can update that on the reservation. You can also edit the record to add additional payments or costs.

To edit a reservation

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add/Edit Reservations** and click **Go** .
3. On the **Reservations** menu, in the **Activity** field, select the activity you want to edit a reservation for.
4. Click **Roster**.
5. Select the individual for whom you want to edit reservation information and click **OK**. To quickly locate the individual, you can sort the roster by **Last Name** or **First Name**.
6. Make the desired changes or corrections on the appropriate tab, then click **OK**.

Deleting a Reservation Record

If you need to, you can delete a reservation record. You may need to delete a record if it was entered in error or if the individual decides not to attend the activity.

To delete a reservation

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add/Edit Reservations** and click **Go** .
3. On the **Reservations** menu, in the **Activity** field, select the activity you want to delete a reservation for.
4. In the Add/Edit Reservations window, click **Roster**.
5. Select the reservation record you want to delete and click **OK**.
6. Click **Delete**.
7. When the confirmation message displays, click **Yes**.

Refreshing a Reservations Record

The Refresh option updates name, address, and phone information for the selected individual using the information entered in People and Reservations.

For example, if you update a member's address in People from 11A Sycamore Street to 12B Spruce Street, you can carry over the updated information from People into Reservations using the Refresh option.

> **Make a Backup**
>
> We strongly suggest that you create a backup of your data before attempting to refresh your reservations information.

To refresh a reservation record

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add/Edit Reservations** and click **Go** .
3. Under **Activity Information**, select the appropriate Activity.
4. Click **Roster**.
5. Select the individual whose record you want to refresh, and click **OK**.
6. Click **Refresh**, then **OK**.

Printing an Individual Reservations Listing

In Add/Edit Reservations, you can print an Individual Reservation Listing that displays the registrant's name, contact information, emergency contact, notes, costs, and payments associated with the reservation. You may want to print this and give it to the registrant.

To print an Individual Reservations Listing

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **Add/Edit Reservations** and click **Go** .
3. In the **Activity Information** drop-down list, select the activity the individual registered for.
4. To select the registrant, click **Roster**.
5. When the individual or organization's reservation displays, click .
6. When the report displays, click **Print Report** .

Reservations Reports

In the Reservations module, you can print reports containing various information concerning your organization's reservations.

To access Reports

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Reservations Reports** and click **Go** .
3. Expand the type of report of report you want to display, then select the report.
4. To customize a report, click **Customize**. To preview a sample report using your data, click **Preview**. To print the report without customizing it, click **Print**.

The following reports are available in Reservations:

Report	Description
Laser 2-Up Labels	Creates laser labels for individuals participating in the selected activity. Several formatting and report options are available. Labels display two across and 20 per page.
Laser 3-Up Labels	Creates laser labels for individuals participating in the selected activity. Several formatting and report options are available. Labels display three across and 30 per page.
Name Badges	Creates name badges for individuals in the selected activity. You can select the fields that display and fonts that are used. Three badge styles are available.
4 X 6 Laser Cards	Creates 4x6 laser cards to help organize information about individuals participating in a selected activity. Several formatting and report options are available. Two cards print on each page.
PhoneTree Export	Creates an export titled PhoneTree.pbf for selected activities. You can send this file to PhoneTree, a voice message delivery system that calls each individual to deliver a personalized message that you record.
Reservations Extract	Creates an extract that you can use with other software applications based on the selected activity.
Activity Settings	Creates a profile for the selected activity. It includes the coordinator's name and activity details such as start and end dates, notes, quantity, element fields, and cost information.

Report	Description
Listing of Names, Addresses, and Phones	Creates a list of names, addresses, and phone numbers for individuals participating in the selected activity.
Listing of Names, Addresses, and Phones - Detail	Creates a list of individuals participating in the selected activity with detailed cost and payment information for each person.
Listing of Names, Addresses, and Phones - Summary	Creates a list of individuals participating in the selected activity with detailed cost and payment information for each person.
Reservations Master Listing	Creates a list of individuals participating in the selected activity with their activity information.
Payment Worksheet	Creates a list of individuals participating in the selected activity with a summary of the cost and payment information for each person. It displays in a worksheet format.
Statement Report	Creates a statement for each individual participating in the selected activity with a summary of the cost and payment information for each person.

Printing Name Badges in Reservations

You can customize and print name badges in the Reservations module. The Layout option lets you select the type of Name Badge you have purchased, the fields to display on the Name Badges, and a different font for any or all of the fields.

To customize and print Name Badges

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Reservations Reports** and click **Go** .
3. Expand **Labels**, select the **Name Badges** report, and click **Customize**.
4. In the **Activity** drop-down list, select the Activity you want to create the report for.
5. Under **Formatting**, click **Badge Layout**.
6. In the **Badge Style** drop-down list, select the desired badge style.
7. On the sample badge, click the first line to select it.
8. In the **Field** drop-down list, select the field you want to print on the first line of the badge.
9. **Optional**: Click **Font** and select the desired font.
10. Repeat these steps for the additional lines on the badge, then click **OK**.
11. In the Customize Name Badges window, click **Preview** to display your badges.
12. When your badges display, click **Print Report** .

Additional Field Information

Badge Style

In the drop-down menu, you can select which style of name badge you will be using, such as Name Badge Inserts (Avery 5390), Name Badge Labels (Avery 5395), or Hanging Name Badges (Avery CS-4C).

Field

For fields, you must first click in the first, second, or third line of the sample badge in which you want the data to display. The default selection that displays is **<none>**. When you select a line, you can choose the information you want to display in that line from the **Field** drop-down menu. You can have up to three lines of information.

For example, you can select **First Last** to print the first and last name of the individual in the first line, **Title** to print the individual's title in the second line, and **Company** to print the individual's company in the third line.

Font

For each line, you can click **Font** and select the font style and size you want the line to print in. You can make separate selections for each line.