



The easiest way to create the table seating plan for your wedding, celebration or event

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## PerfectTablePlan 3.1.4

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## 1 Introduction

### 1.1 Introduction

# PerfectTablePlan v3.1.4 for MacOSX

PerfectTablePlan helps you quickly create table plans and seating charts for weddings, parties, banquets and events. We think you will find it a lot easier than using scraps of paper.

The unlicensed version of PerfectTablePlan only allows to you to save, export or print plans with up to 30 guests. If you want more than 30 guests you will have to [purchase a licence](#).

If you are confident of your computer skills you should start with the [Quick start guide](#). This will get you creating your first table plan very quickly. If you would like more in-depth instructions please go through the [Tutorial](#). You can also watch [online demonstration movies](#).

Note We have a separate version of this document for Windows.

### 1.2 Conventions in this document


Screenshots are taken from the Windows Vista version of PerfectTablePlan.

Text that refers to elements of the user interface is in **bold**, e.g. **Main window**.

**menu1>item1** means: click on **menu1** in the menu bar and select **item1**.

Text that the user can type is in a non-proportional font.

Text that refers to keyboard keys is in *italics*, e.g.:

The keyboard accelerator for **Insert>**  **Single guest** is **⌘+G**, which means hold down the **⌘** Key and press the **G** Key.

Hyperlinks are shown in conventional [hyperlink format](#).

Underline is used for emphasis.

'Click' means clicking the left mouse button, unless stated otherwise. If you have a

single button mouse you can simulate right click by holding down the *Ctrl* key and clicking the left mouse button.

### 1.3 System requirements

The suggested requirements for running this software are:

Operating system	MacOSX 10.3.9 or later.
Processor	G3 or better
Memory	32 MB or better
Screen resolution	800x600 pixels or better
Colours	65,536 colours or better

You may be able to run the software satisfactorily on lower specification systems, but we can't guarantee it. If in doubt, try running an [unlicensed version](#) before you purchase a licence.

### 1.4 The help system

Help is available in a number of different ways.

#### Context sensitive help

Context sensitive help provides detailed information on the use of each pane and window.

To access context sensitive help press **⌘?** or click on a **Help** button.

This opens help in a separate window.

#### The MacOSX Help Viewer

The Macintosh Help is similar to the Windows Help, but is displayed inside a web browser window. If you can't see the contents tree in the left pane, try enabling Java in your browser.


## PDF help

A PDF version of the help is also installed with the application. You may find this more suitable for printing.

## 'How do I?' help


Click on the **How do I?** button on the tool bar to see a list of common tasks you might want to perform. Click on an item in the list to go to the relevant help page. The list of topics shown varies depending on what you are trying to do (e.g. which panes are visible).

## Tool tips

Some controls display tool tip windows when you hover your mouse cursor over them. You can turn this feature on/off using the **show tool tips** checkbox in the [Preferences window](#). 

## 'What's this' help

**What's this** help provides tips on individual controls, e.g. on the function of tool bar buttons, menu items, text entry fields etc.

To access **What's this** help from the [Main window](#) select **Help** >  **Whats this**. Then click on the item you are interested in and a brief description will appear in a small **What's this** window.

Note pressing *Shift+F1* also activates this facility for the **Main** window.

## Web pages

Additional documentation may be available on our web pages. To open the web pages in a browser select **Help** > **FAQ page** or **Help** >  **Web pages**.



## 2 Quick start guide

### 2.1 Quick start guide

This page gives you instructions to get you started using PerfectTablePlan quickly. If you want step-by-step instructions please go to the [Tutorial](#).

There are 5 simple steps to creating a table plan:

1. Add guests.
2. Define who should sit near (or not near) whom.
3. Add tables.
4. Assign guests to seats.
5. Print/export results.

These 5 steps correspond to the 5 **Task** tool bar buttons.







When one of these buttons is pressed you will only be able to see the panes and tool bar buttons appropriate to that task.

Ensure View>User interface>Basic is selected so that the Task tool bar is visible.



### 1. Add guests

Click on the  button in the **Task** tool bar, if it isn't already selected.


Guests can be added as individuals, couples, families or groups using **Insert>**  **Single guest**, **Insert>**  **Guest couple**, **Insert>**  **Guest family**, **Insert>**  **Guest group** or the equivalent **Insert** tool bar buttons. You can add everyone as individuals, but it saves time to add them as couples, families and groups where appropriate.


Each guest has the following properties:


Property	Meaning
Title	The guest's title.
First name	The guest's first (given) name.
Last name	The guest's last (family) name.
Display name	The name you wish to display for the guest (which may include qualifications, job title and other information).
Gender	Whether the guest is male or female.
Age	Whether the guest is an adult or a child.
Meal	The guest's choice of meal (separate by commas if there is a choice in more than one course).
Special req	Any special requirements the guest has, e.g. diabetic or in a wheelchair (separated by commas if there is a choice in more than one special requirement).
Notes	Information not recorded elsewhere.
VIP	Used to mark a Very Important Person; for a wedding this may be a member of the wedding party, for a conference it may be a keynote speaker and for a business lunch it may be a table sponsor.
RSVP	Whether the guest has been sent an

	invitation and whether they have accepted, declined or accepted then cancelled.
--	---



Most of this information is optional, but a guest must have at least a first name or a last name. Guests are shown in **bold** if they have not been assigned a seat.



In addition, every guest is a member of a group (even single guests belong to their own group). Each group has optional contact details and notes. Each group only has one set of contact details, so generally you should assign people to a group if they have the same contact address (e.g. a couple or representatives from the same company). You can easily drag guests from one group to another in the  **Groups** pane.


If you already have guest data (for example as vCards, in a spreadsheet, text file or address book) you can import it using **File>**  **Import....** See [Importing data](#) for more information.

You can also quickly create a guest list using the **Insert>**  **Guests scratch-pad** or the equivalent Insert tool bar button. This allows you to enter one guest/couple/family/group per line in free text format.

Once you have entered a guest's details you can change their properties later by selecting them and then choosing **Edit>**  **Properties** or the equivalent **Main** tool bar button.

Click on the appropriate column headers in the  **Guests** pane to sort the guests by first name, last name etc. You can also see how guests are grouped in the  **Groups** pane.

You can enter general information about your event using **File>**  **Information...** and check the number of attendees and cost using **File>**  **Numbers and budget....**





You should now make sure you save your plan using **File>**  **Save**. You will be asked to provide a name for the new plan file.







## 2. Define who should sit near who





Click on the  button in the Task tool bar.

You may want to have some guests sitting close to each other (for example couples, friends and people who you think might be compatible) and some sitting far apart (for example divorced couples). The automatic assignment function will take account of proximity when it decides where to place guests.


Proximity	Icon	Meaning
Next to		should be placed next to each other
Near to		should be placed next to or on the same table
Neutral		no preference
Not next to		should not be placed next to and preferably not on same table
Not near to		should not be placed on the same table

If you add guests using **Insert>** **Guest couple**, **Insert>** **Guest family** or **Insert>** **Guest group** a sensible default value will be set for their proximity. However you can change the proximity so that members of a group are not sat together.

You can view and edit the proximity of guests in the  **Proximity** pane. Just click on the appropriate drop-down menu in the table to change the proximity. Note that the table is symmetric - if you change the proximity for column A and row B the proximity for row A and column B will change to match.

If you want to set the proximity for a number of guests, select them all in the  **Guests** pane (using *Shift+click* or *⌘+Click*) and then select the appropriate proximity from **Edit>Proximity** (you must select more than one guest). Alternatively click on a group in the  **Groups** pane and select the appropriate proximity from **Edit>Proximity**. You will need to click on the  button to show the  **Guests** pane.

### 3. Add tables

Click on the  button in the **Task** tool bar.











Tables can be added using **Insert> Circular table**, **Insert> Rectangular table**, **Insert> Banquet table**, **Insert> Head table**, **Insert> Custom table** or the equivalent **Insert** tool bar button. The types of table are:


Table	Icon	Meaning
<b>Circular</b>		a circular table with seats all around it
<b>Rectangular</b>		a rectangular or square table with matching numbers of seats on opposite sides
<b>Banquet</b>		a long table with a matching number of seats on two sides
<b>Head</b>		a long table with seats on only one side, for example a head (top) table at a wedding or banquet
<b>Custom</b>		a rectangular or square table with any number of seats on each of the 4 sides

Each table has the following properties:

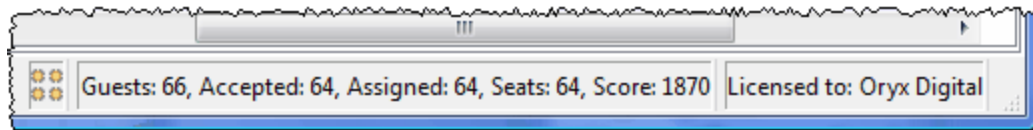
Property	Meaning
----------	---------

<b>Name</b>	The name displayed for the table. The default name is "Table 1" , "Table 2" etc, but you can set any name.
<b>Shape</b>	See above.
<b>Angle</b>	The rotation angle of the table in the 🍷 Floor plan and 🍷 Table plan panes.
<b>Colour</b>	The colour of the table in the 🍷 Floor plan and 🍷 Table plan panes. This overrides any colour set for the pane.
<b>Seats</b>	The number of seats for the table.
<b>Size</b>	The size of the table. Check the auto check box to size the table automatically (according to the seat size and the number of seats).
<b>VIP</b>	Check the box to designate a VIP table. The automatic seat assignment attempts to assign VIP guests to VIP tables.
<b>Notes</b>	Used to record useful information not recorded elsewhere

The **Create** field allows you to add more than one table at a time.

Once you have created a table you can change any of its properties (including the name and shape) by selecting it and then choosing **Edit** >  **Properties** or the equivalent **Main** tool bar button.

You should make sure that you have enough seats for all your guests. You can see how many seats and guests you have at any time by looking in the **Status** bar at the bottom of the **Main** window.



New tables will be placed in an empty space near the centre of the **Floor plan** pane. You can move tables in the **Floor plan** by dragging them (left click on the centre of a table, hold down the left mouse button and drag to the appropriate position). You can zoom in and out of the **Floor plan** using the and buttons or zoom so all tables are visible using the button. When you are zoomed in you can move around the **Floor plan** by clicking on the scroll bars or by dragging the background (the cursor will change to a hand). You can change the size of the floor plan using the button.

Use the **Insert shape** and **Insert text** buttons to add shapes and text to the **Floor plan** pane. Shapes can be used to represent dance floors, stages, walls and other features of your floor plan. Text can be used for titles, headers and footers.

Rotate a table, shape or text by clicking the **Rotate** button.

Move a table, shape or text behind (under) another by clicking the **Move to back** button.

You can also view one table at a time in the **Table plan** pane. Use the navigation buttons to change table.

Save your plan using **File>** **Save**.



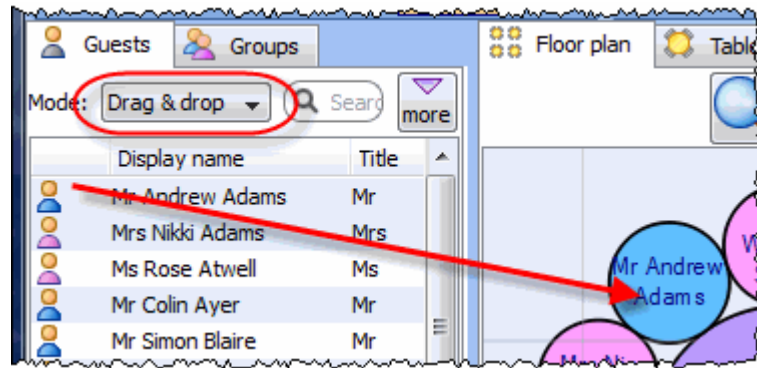
## 4. Assign guests to seats

Click on the button in the **Task tool bar**.

Once you have entered guest details and added tables, you can assign seats automatically or using drag and drop. You will often need a combination of both for best results.

If you have people that you definitely want to sit in certain seats (for example the wedding party or VIP guests) you can assign their seats manually. Drag these guests or groups from the **Guests** or **Groups** pane to the appropriate table or seats in either the **Floor plan**, **Table plan** or **Schematic** panes. To drag a guest or group left click, hold down the mouse button and drag to the appropriate seat

(select more than one guest/group by using *Shift*+click or *⌘*+click). Drag a whole group by holding down the *Shift* key when you start to drag a member of that group. Make sure the **Guests** or **Groups** pane is set to **drag and drop** mode.



You can 'lock' guests to stop the automatic seat assignment moving them later. Lock them in place by selecting the guests, for example in the **Guests** or **Floor plan** pane, and choosing **Edit>Locked** (you can also select a table and lock all the guests on it).




The rest of the guests can now be assigned to the remaining seats automatically by selecting **File>⚠️ Auto assign seats** or the equivalent **Main** tool bar button. If you have a large table plan (200+ guests) you may need to increase the amount of time allowed for the automatic assignment in the [Preferences window](#).









The automatic assignment will try to find the best seating assignment using a [scoring approach](#). The scoring takes account of:


- guest proximity
- alternating genders (if selected in the **Preferences** window)
- seating VIPs on VIP tables
- not seating guests on their own
- VIPs score higher than guests who aren't VIPs


You can halt the automatic assignment at any time by pressing the **Stop** button. The best solution so far will be kept. If you don't like the changes you can select **Edit>🔄 Undo** to undo the change.








You can reassign guests by dragging and dropping them in the  **Floor plan**,  **Table plan** or  **Schematic** panes to fine-tune the seat assignments. You can also change proximities and re-run the automatic assignment as often as you like.

You can see how good your seat assignment is by looking at the scores in the  **Schematic** pane (check **show scores**, positive scores are good, negative scores are bad) or by holding down the proximity buttons at the top of the  **Floor plan** or  **Table plan** panes. For example the  button will show you any non-ideal positioning (such as guests with proximity  who aren't sat next to each other). To see these proximity buttons you will need to click on the  button in the  **Floor plan** or  **Table plan** pane. Obviously, what makes [a good table plan](#) is hard to fully define in mathematical terms, but the score will usually give a fair indication.

Use the  **Table chart** pane to see your plan ordered by table.

Use the  **Guest chart** pane to see your plan ordered by guest last name.







Use the  **Statistics** pane to see some statistics about your plan.


At any time you can unassign a guest from their seat by choosing **Edit>Unassign** or dragging them on to the background in the  **Floor plan** or  **Table plan** pane. You can select multiple guests for unassigning (except in the  **Floor plan** or  **Table plan** pane) by using **Shift+click** or **⌘+Click**.









## 5. Printing/exporting


Click on the  button in the **Task** tool bar.

When you are happy with your table plan you can print off the  **Floor plan**,  **Table plan**,  **Table chart**,  **Guest chart**,  **Stationery** and/or  **Statistics** panes using **File>Print** or the equivalent **Main** tool bar button. Alternatively, order a table plan/seating chart online from one of our partners using **File>Order plan online**.

From the  **Stationery** pane you can print invitations, place cards, escort cards, labels and other stationery. You can easily merge guest names and addresses and other details into stationery items using [substitution text](#).

You can [export your plan to another application](#) using **File>Export**.

Copy the contents of the  **Floor plan** ,  **Table plan**,  **Table chart**,  **Guest chart** and/or  **Statistics** panes into the clipboard using **Edit>**  **Copy**, for example to paste into Microsoft Word or Excel.

Make sure you save your plan using **File>**  **Save** before exiting.

If you want to try laying out a more realistic table plan, try loading one of the sample plans supplied with PerfectTablePlan.

If you are confident in your abilities you may wish to change to the expert user interface by selecting **View>User interface>Expert**.

This completes the quick start guide.

See also:

[Frequently Asked Questions](#)

[Tutorial](#)

[Movies](#)

## 3 Movies

### 3.1 Movies

We have demonstration movies on our [website](#). This can be a useful way to get a quick overview of the capabilities of PerfectTablePlan. They are in 'Flash' format (viewable in most web browsers) and Windows .exe format.

## 4 Tutorial

### 4.1 Tutorial

This tutorial gives you step-by-step instructions on how to use some of the major features of PerfectTablePlan. If you are a confident computer user and want to get started quickly you might prefer the [Quick start guide](#).

Note You can also view these tutorials as movies [on our website](#).

Next: [1. Getting started >>](#)

## 4.2 1. Getting started

Note You can also view this tutorial as a movie [on our website](#).

If PerfectTablePlan isn't already running, start it now.

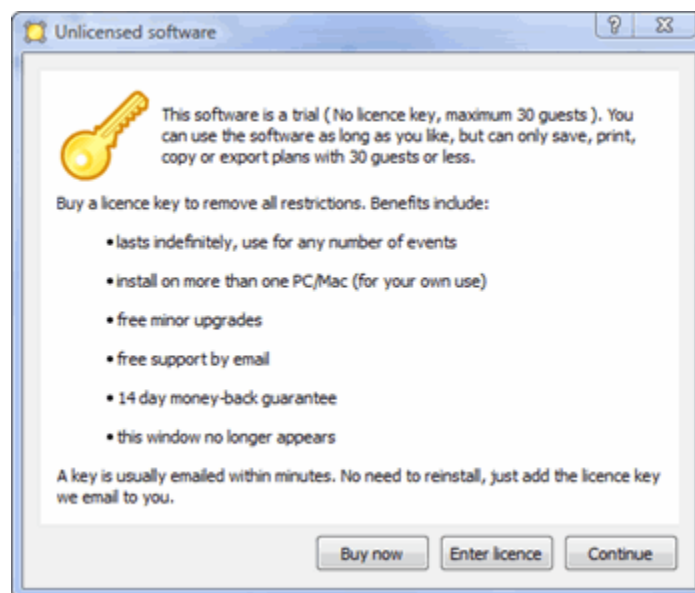
Double click on the 🗨 PerfectTablePlan icon in the **Applications** folder (or wherever you copied it to)

If you are reading this help on your computer screen try arranging the Help and PerfectTablePlan windows so you can see them both. Alternatively you may find it easier to print out this tutorial. To print the tutorial select **File>Print...** from your browser.

You can also print the PDF version of the help.

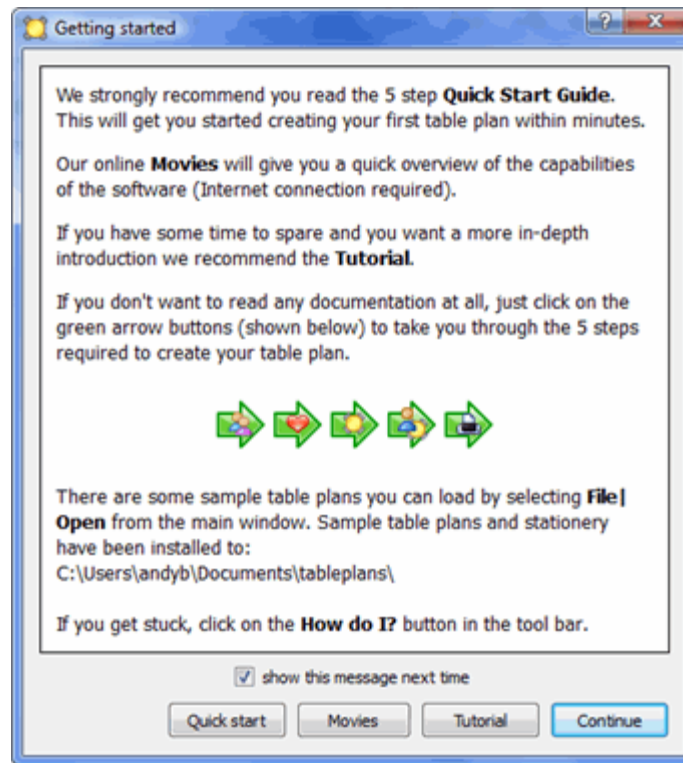
Warning The PDF help is nearly 200 pages!


The 🗨 **Unlicensed software** window may appear when you start PerfectTablePlan.

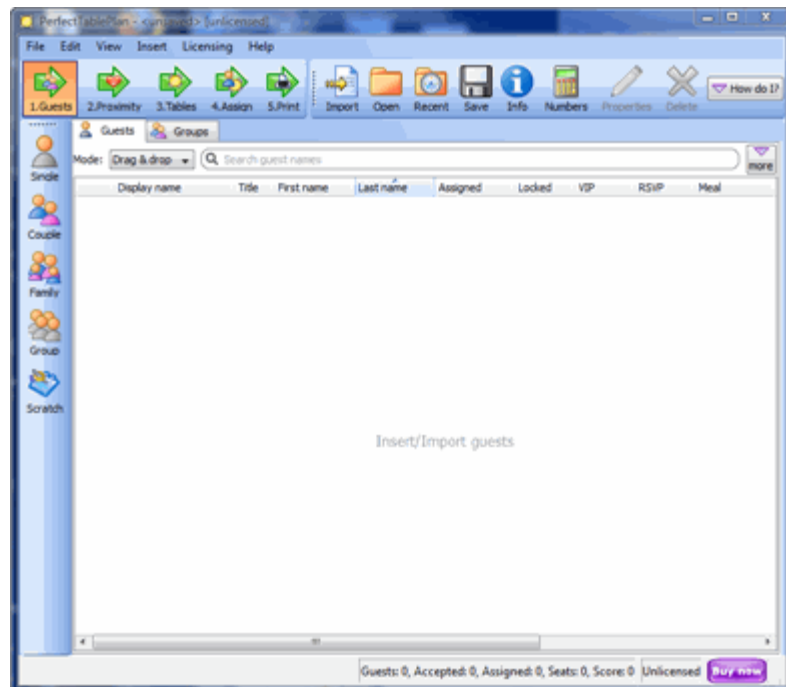


If you have a [licence key](#) you can enter it now, however you can complete the tutorial without it. Click the **Continue** button.

The 🗨 **Getting Started** window may now appear.

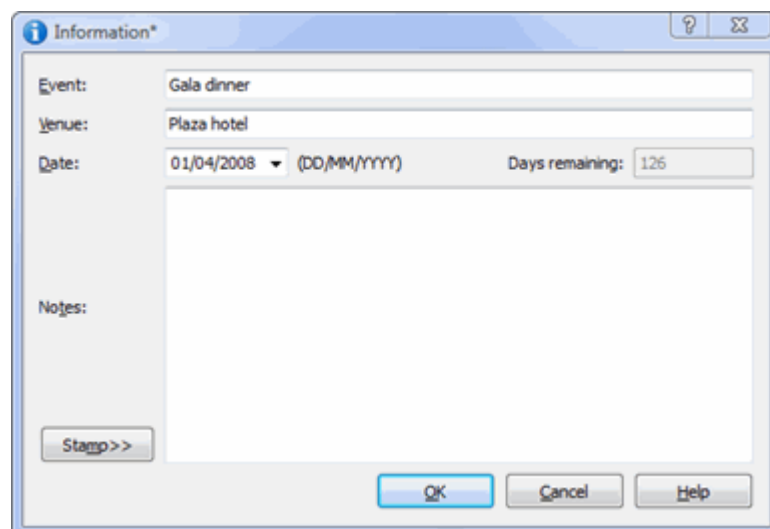


If you don't want to see it again uncheck the **show this message next time** check box. Click the **Continue** button. You should now see the **Main** window. For this tutorial we will use the basic interface, select **View>User interface>Basic**, if it isn't already selected. Then click on the  **1.Guests** button in the **Task** tool bar, if it isn't already selected.



Take a minute to investigate the various menu items and tool bar buttons. If you hover the mouse cursor over a tool bar button, a **Tool tip** window will appear with some helpful text.

Select **File>Information** and add some basic details about the event.




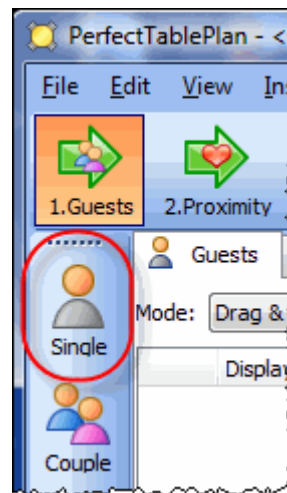
Next: [2. Add guests >>](#)

## 4.3 2. Add guests

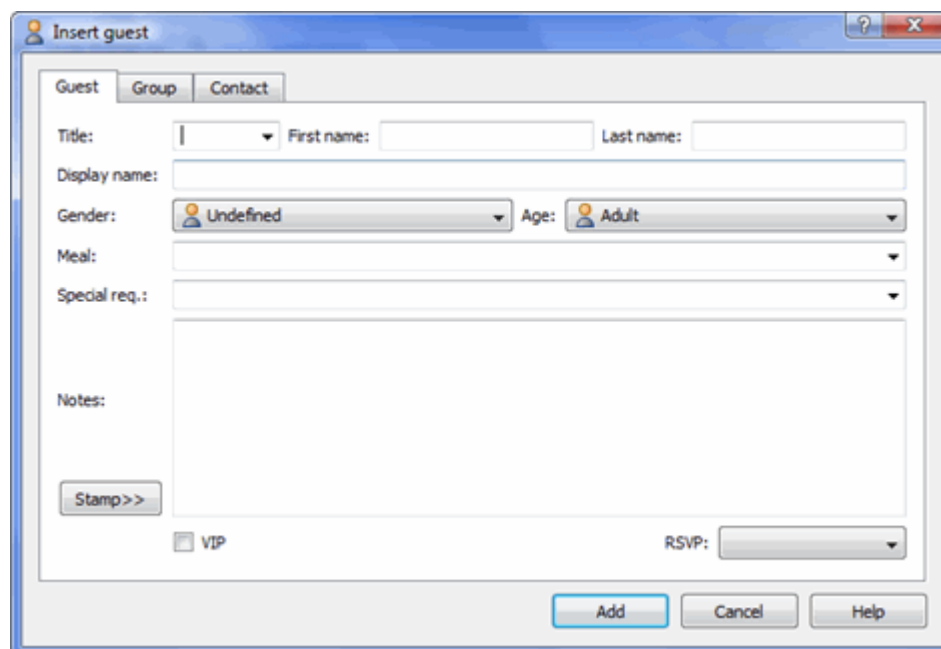
Note You can also view this tutorial as a movie [on our website](#).

The first step to creating your table plan is to add information about your guests.

Click on the  **Insert single guest** button in the **Insert** tool bar (on the left of the [Main window](#)).



The  **Insert guest** window will appear.



**Insert guest**

Guest Group Contact

Title: [ ] First name: [ ] Last name: [ ]

Display name: [ ]

Gender: [ Undefined ] Age: [ Adult ]

Meal: [ ]

Special req.: [ ]

Notes: [ ]

Stamp >>

☐ VIP

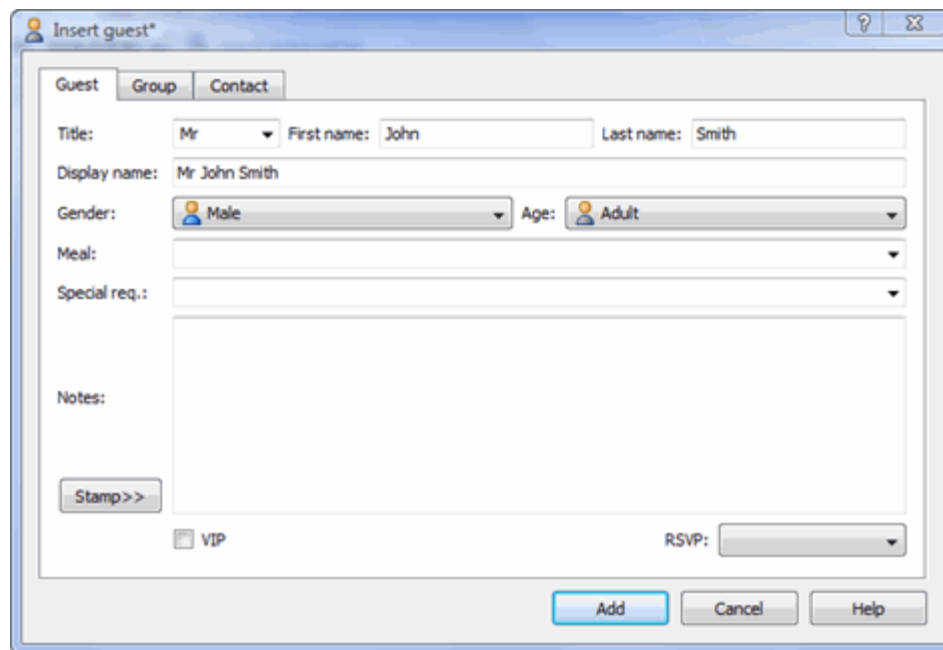
RSVP: [ ]

Add Cancel Help

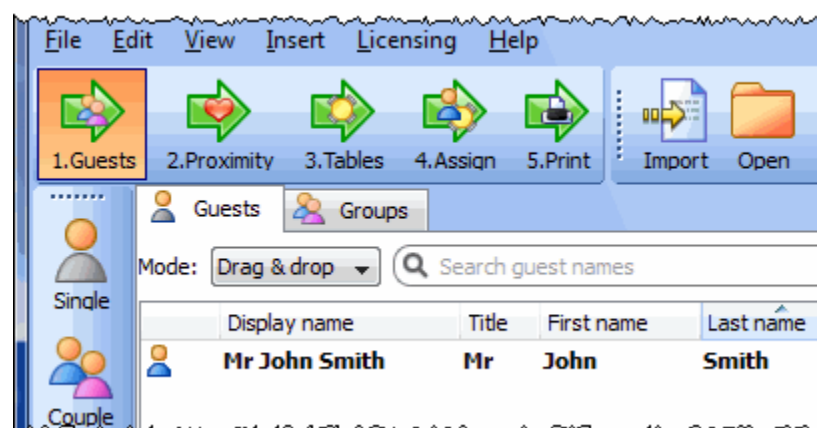
Select **Mr** from the **Title** drop-down list. Note that the **Gender** has now been set to **Male**.



Type `john` in the **First name** field. Note that it is automatically capitalised to `John`. Press the keyboard *Tab* key to move to the next field.

Type `smith` in the **Last name** field. Press the *Tab* key. Note the **Display name** has been set to `Mr John Smith`.



Click the **Add** button. The guest will be added to the  **Guests** pane.



Click on the  **Insert guest couple** button in the left (Insert) tool bar. The  **Insert**




**couple** window will appear. Fill in the details of the first guest of the couple, as below. Click on the **VIP** check box to show that this is a particularly important guest:



The screenshot shows the 'Insert couple\*' dialog box with the 'Guests' tab selected. It contains two guest entries. The first entry is for 'Mr Joe Bloggs', a male adult, with a 'Stamp>>' button and a 'VIP' checkbox. The second entry is for 'Mrs Bloggs', a female adult. Both entries have fields for Title, First name, Last name, Display name, Gender, Age, Meal, Special req., and Notes. At the bottom are 'Add', 'Cancel', and 'Help' buttons.

Now move the scroll bar down and complete the details of the second guest of the couple, as below:





Click the **Add** button.

Click on the  **2.Proximity** button in the **Task** tool bar. Notice that a  is displayed in the  **Proximity** pane.

Proximity	
Bloggs, Jill	Bloggs, Joe
Bloggs, Jill	
Bloggs, Joe	






This means that Joe Bloggs and Jill Bloggs should be placed on a table next to each other.


Click on the  **1.Guests** button in the **Task** tool bar.

Click on the  **Insert guest family** button in the left (Insert) tool bar. The  **Insert family** window will appear. Add the following guests:

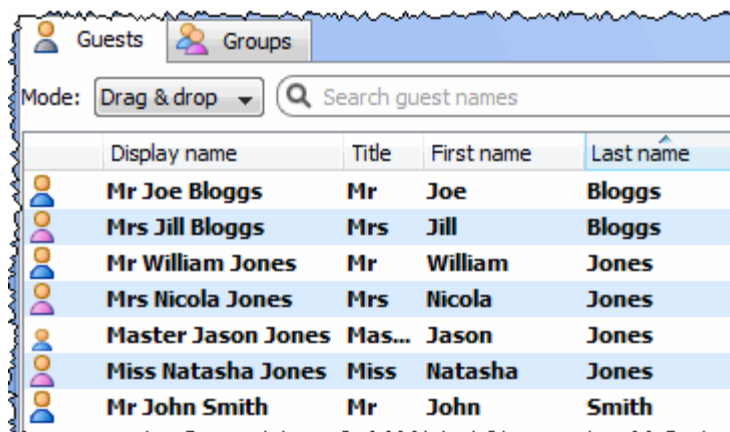
Title	First name	Last name	Gender	Age
Mr	William	Jones	Male	Adult
Mrs	Nicola	Jones	Female	Adult
Master	Jason	Jones	Male	Child
Miss	Natasha	Jones	Female	Child

Click the **Add** button.

Click on the  **2.Proximity** button in the **Task** tool bar. Notice that a  is displayed in the  **Proximity** pane for Mr and Mrs Jones. A  is displayed for all the other family members. This means that Mr and Mrs Jones should be placed on a table next to each other, and the rest of the family members near to each other. Click on the  **1.Guests** button in the **Task** tool bar.

Select **File>**  **Save** to save the plan. The **Save as** window will appear. Enter a sensible name, such as `tutorial`, and click **Save**.

Look at the  **Guests** pane.

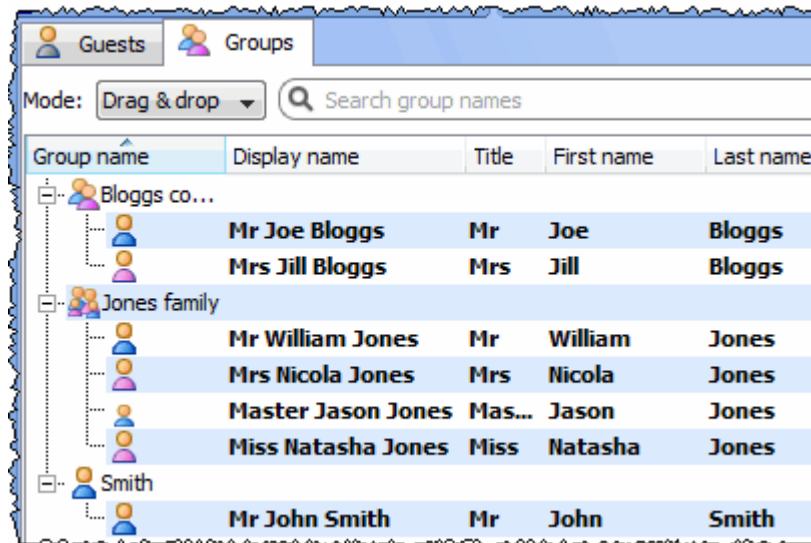





Display name	Title	First name	Last name
Mr Joe Bloggs	Mr	Joe	Bloggs
Mrs Jill Bloggs	Mrs	Jill	Bloggs
Mr William Jones	Mr	William	Jones
Mrs Nicola Jones	Mrs	Nicola	Jones
Master Jason Jones	Mas...	Jason	Jones
Miss Natasha Jones	Miss	Natasha	Jones
Mr John Smith	Mr	John	Smith

Notice that you can determine age and gender from the guest icon. The guests are shown in bold as they haven't yet been assigned to seats.

Click on **Display name**, **Title** and other column headers to sort the guests.

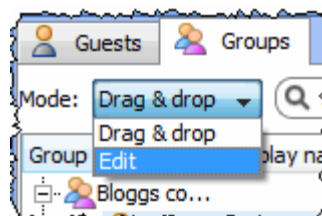
Click on the  **Groups** tab.



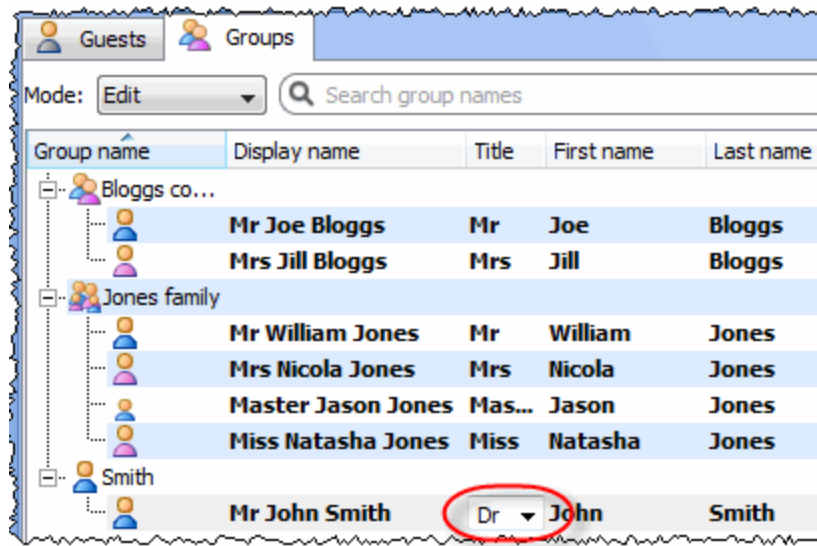
Group name	Display name	Title	First name	Last name
 Bloggs co...	<b>Mr Joe Bloggs</b>	Mr	Joe	Bloggs
	<b>Mrs Jill Bloggs</b>	Mrs	Jill	Bloggs
 Jones family	<b>Mr William Jones</b>	Mr	William	Jones
	<b>Mrs Nicola Jones</b>	Mrs	Nicola	Jones
	<b>Master Jason Jones</b>	Mas...	Jason	Jones
	<b>Miss Natasha Jones</b>	Miss	Natasha	Jones
 Smith	<b>Mr John Smith</b>	Mr	John	Smith

Notice that the guests have been grouped as a couple, a family and a single person (you can easily re-arrange the groups using drag and drop).

In either the  **Guests** or  **Groups** pane select **Edit** mode:



Then click on the row with **Mr John Smith** and in the **Title** column. Type `Dr` and press the *Enter* key.



Note the **Display name** is also updated (unless you have previously edited it). You can also view/edit this guest by double clicking on his icon to display the **Guest properties** window.

You can also set guest's choice of meal, special requirements, whether they have accepted their invitation etc in this pane.

Note You can also add guests by [importing](#) them from other applications such as [Excel](#), [Outlook](#) and [Outlook Express](#). This can save you a lot of typing.

Next: [3. Set proximity >>](#)

#### 4.4 3. Set Proximity

Note You can also view this tutorial as a movie [on our website](#).

The next step to creating your table plan is to decide who should sit near (or not near) whom.

Click on the **2.Proximity** button in the **Task** tool bar. Look at the **Proximity** pane:

Proximity

Display: Last, First Search rows Search columns

	Bloggs, Jill	Bloggs, Joe	Jones, Jason	Jones, Natasha	Jones, Nicola	Jones, William
Bloggs, Jill		❤️				
Bloggs, Joe	❤️					
Jones, Jason				😊	😊	😊
Jones, Natasha			😊		😊	😊
Jones, Nicola			😊	😊		❤️
Jones, William			😊	😊	❤️	

The ❤️ means that these guests should be placed next to each other. The 😊 means that these guests should be placed near to each other, either next to or on the same table, but lower priority than ❤️.

Let us assume you have been asked not to seat Jason and Natasha next to each other. Click on the cell where the column for Jason and the row for Natasha intersect. Pull down the drop-down list and select 🙅 not next to.

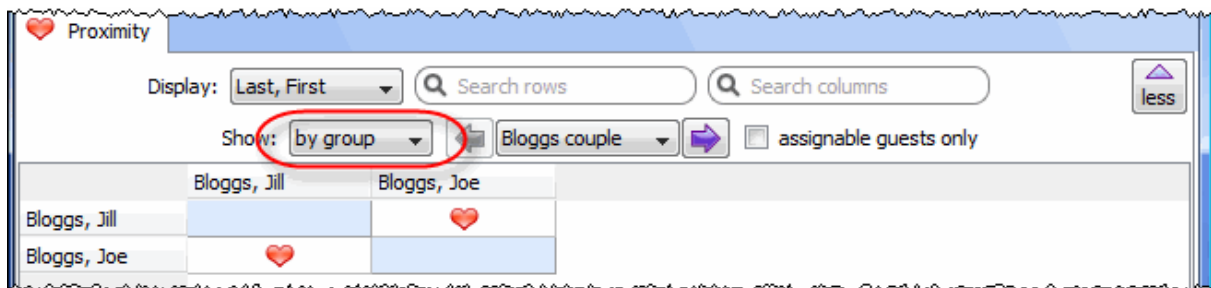
Proximity

Display: Last, First Search rows Search columns

	Bloggs, Jill	Bloggs, Joe	Jones, Jason
Bloggs, Jill		❤️	
Bloggs, Joe	❤️		
Jones, Jason			
Jones, Natasha			<div> 😊 near to           <div> ❤️ next to           <div> 😊 near to           <div> 🙅 not next to           <div> 💀 not near to           </div> </div> </div> </div> </div>
Jones, Nicola			
Jones, William			
Smith, John			

Notice that the corresponding row for Jason and column for Natasha changes to keep the table symmetric.

Click on the 📄 button at the top of the pane to show additional options. Select by group from the Show drop-down list. The ❤️ Proximity pane now shows just one group at a time.



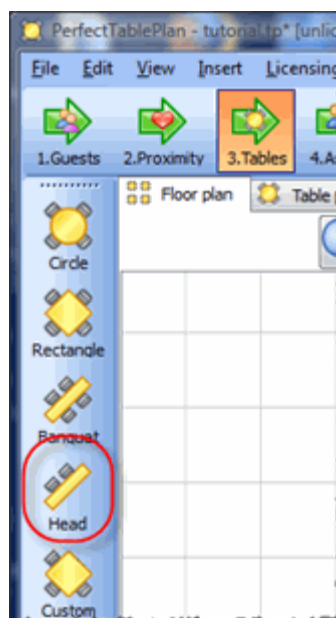
The proximity will become important when we start assigning guests to seats.

Next: [4. Add tables >>](#)

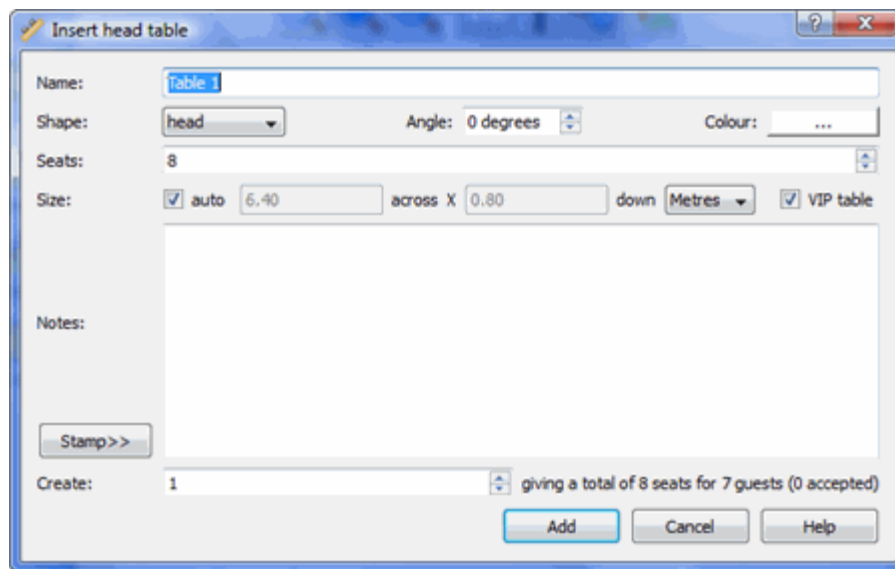
#### 4.5 4. Add tables

Note You can also view this tutorial as a movie [on our website](#).

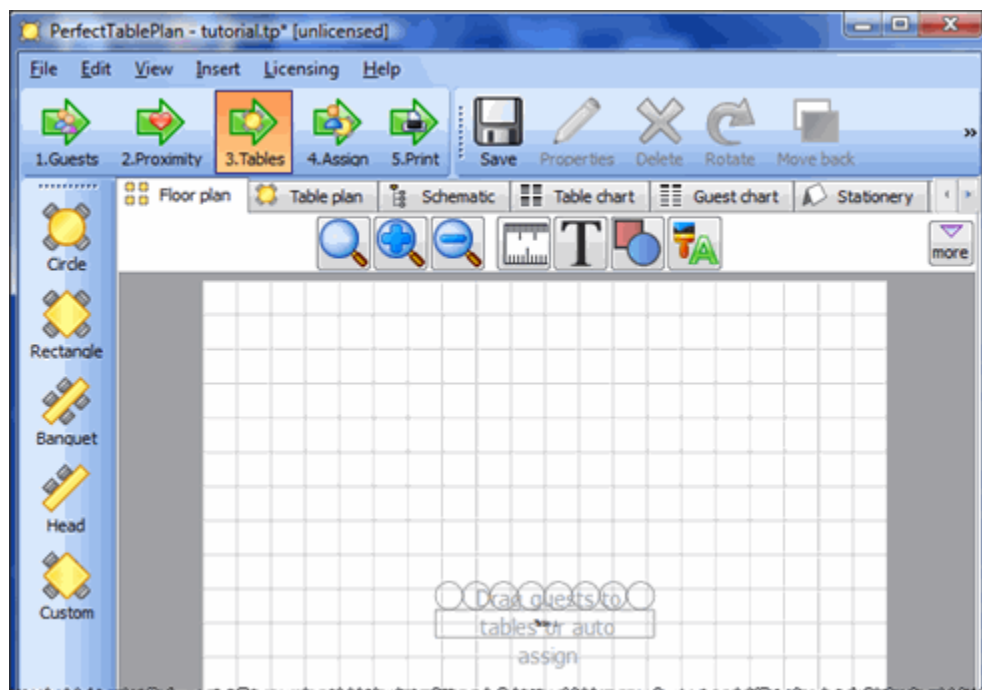
The next step to creating your table plan is to add some tables for the guests to sit at. Click on the ➡️ **3.Tables** button in the **Task** tool bar. Click on the 🪑 **Insert head table** button in the **Insert** tool bar.



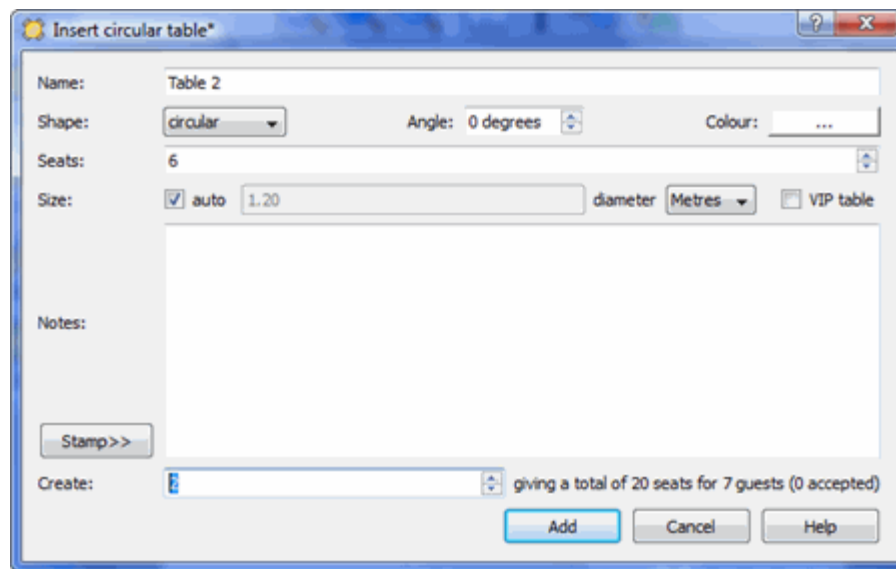
The 🪑 **Insert head table** window will appear.



Click the **Add** button. A long rectangular table with 8 seats down one side will now appear near the centre of the **Floor Plan** pane.



Click on the **Insert circular table** button in the left **Insert** tool bar. The **Insert circular table** window will appear. Change **Seats** to 6. Change **Create** to 2.

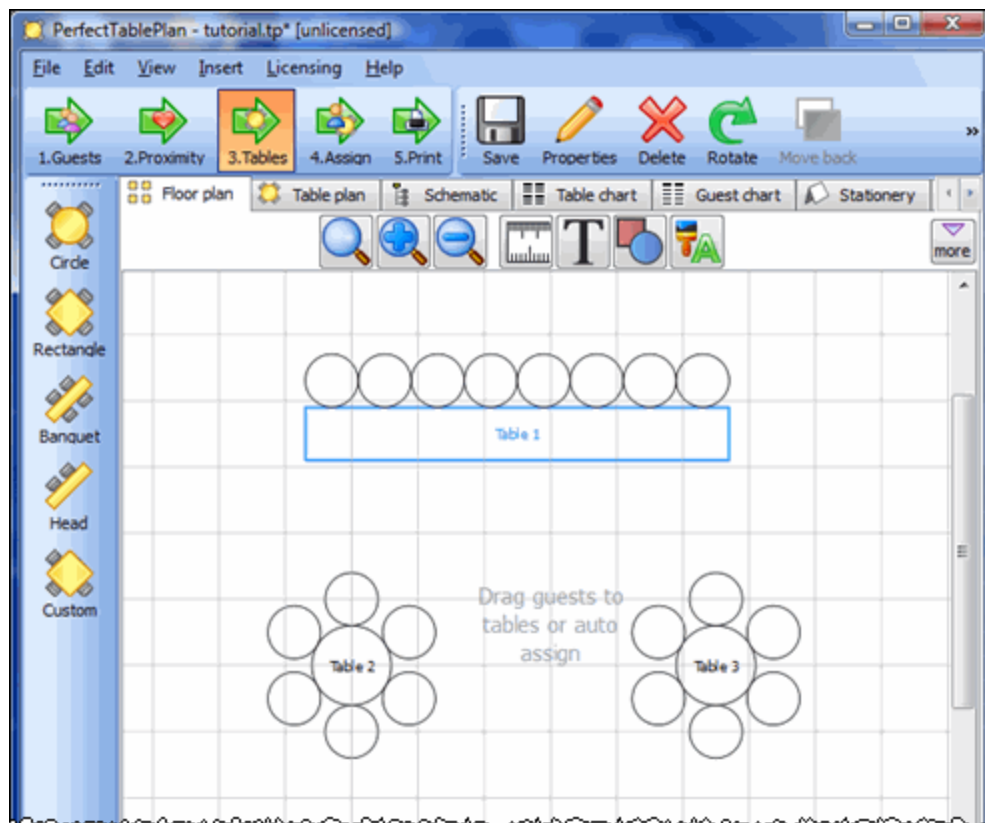




Note that you can see how many seats you will have after the tables have been added, in this case 20 seats.


Click the **Add** button. Two circular tables, each with 6 seats, will now appear in the **Floor Plan** pane. Click the **Zoom so all tables visible** button at the top of the **Floor plan** pane to centre and zoom on the tables you have added.


Drag a table (left click on the centre of a table, hold down the mouse button, move the mouse and then release). The table will be moved to a new position. Drag the tables to the approximate positions shown below.










Experiment with zooming in and out and scrolling the floor plan using the  and  buttons and the scroll bars.

Note You can also use the mouse wheel (if you have one) for zooming or scrolling (depending on the setting in the  **Preferences** window).

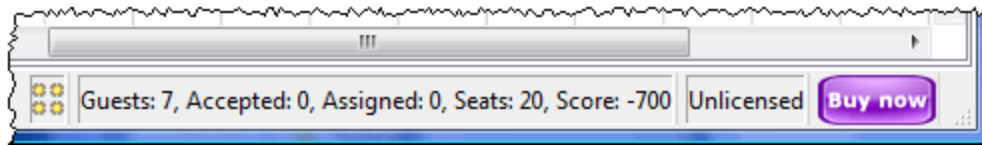
You can change the size of the floor plan using the  button. This allows you to enter the dimensions of the venue in which the event will take place.


You can add shapes and text to the floor plan by clicking on the  and  buttons.




You can rotate a table, shape or text by clicking the  button. You can move a table, shape or text behind another by clicking the  button.

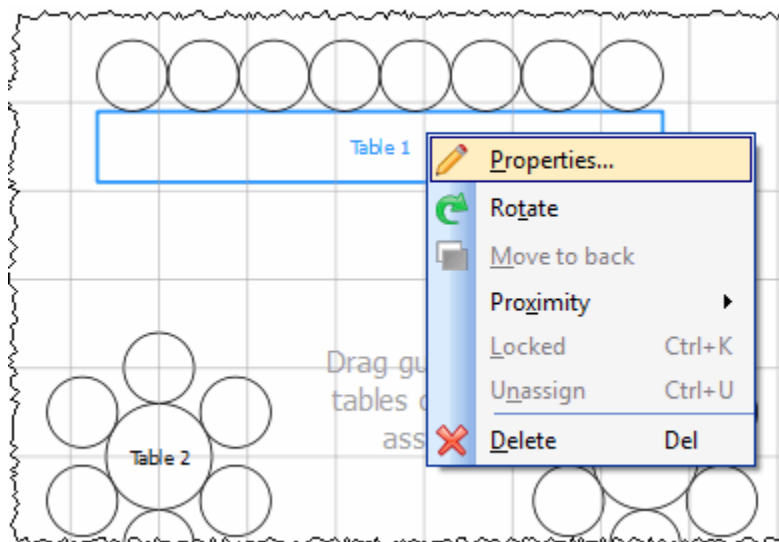
You can change the colours and fonts in the floor plan by clicking the  button at the top of the pane.

The **Status** bar now shows that you have 7 guests and 20 seats:



Click on the  **1.Guests** button in the **Task** tool bar. Add another 11 guests using the same approach as in [Tutorial section 2](#), so that you have a total of 18 guests. Set any groups, names, genders and proximities you like.


Click on the  **3.Tables** button in the **Task** tool bar. You now have 18 guests and 20 seats. Right click on the head table in the  **Floor plan** pane and select  **Properties**.



Change the number of seats to 6. Click the **OK** button.

There are now 18 seats and 18 guests.


Select **File** >  **Save** to save the plan.


Note PerfectTablePlan creates a [back-up file](#) every time you save the plan (unless you have disabled this in the  **Preferences** window). This is useful if you ever need to retrieve an old version of the plan.

Next: [5. Assign guests >>](#)

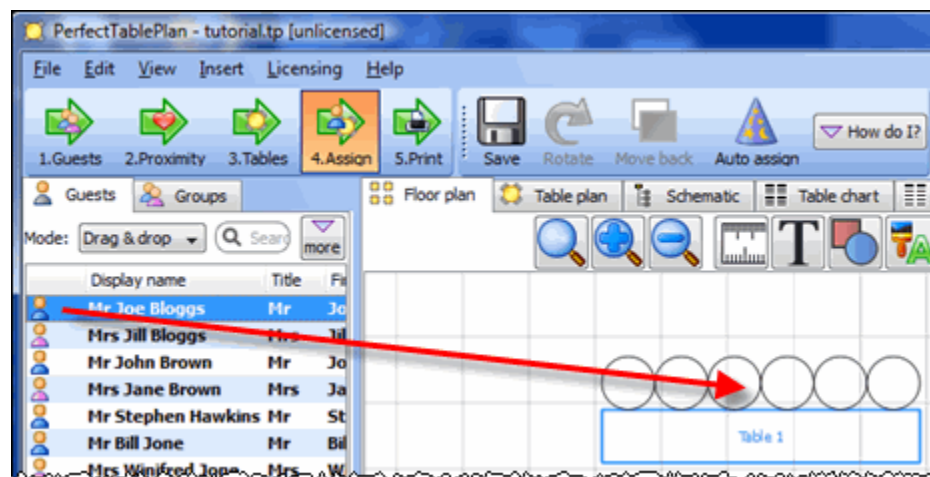
## 4.6 5. Assign guests


Note You can also view this tutorial as a movie [on our website](#).

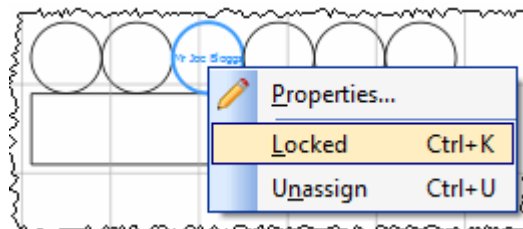
The next step is to assign guests to seats. Click on the  **4.Assign** button in the **Task** tool bar.


Ensure the  **Guests** pane is at the front and set the **Mode** to **Drag & drop** (not **Edit**).



Left click on the  icon for Mr Joe Bloggs in the  **Guests** pane. Drag him (hold down the mouse button, move the mouse and then release) to a seat on the head table in the  **Floor Plan** pane.




Right click on the seat you have dragged Mr Joe Bloggs to in the  **Floor plan** pane and select **Locked**.

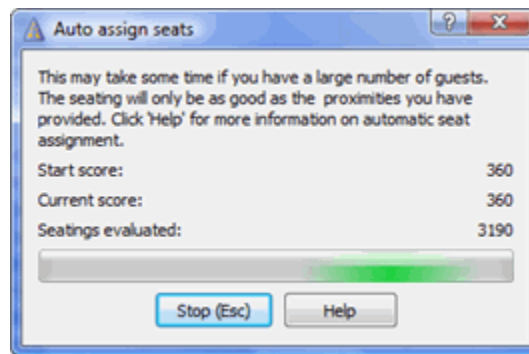



A locked guest cannot be re-assigned until they have been unlocked. This is particularly useful for stopping the  **Auto seat assign** from moving guests who you wish to remain in their assigned seat. You can also select a table and lock all the guests on it.

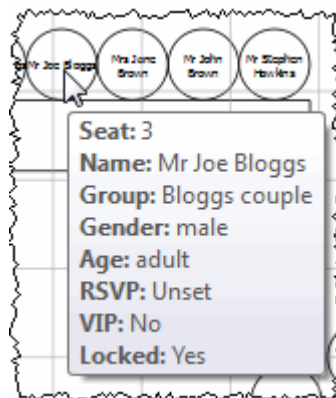
Drag Mrs Jill Bloggs to the next seat to Mr Joe Bloggs and lock her, in the same way. Note that locked guest appear underlined in the  **Guests** and  **Groups** panes.



Now that you have assigned your VIPs, you are going to assign the rest of the guests automatically.

Click on the  **Auto seat assign** button in the Main tool bar. The Auto assignment window will appear:





The **Auto assignment** window should disappear after a few seconds. If you look at the  **Floor plan** pane you should see that all seats now have guests assigned. If you hover the mouse cursor over a seat the details of the guest assigned will be displayed:

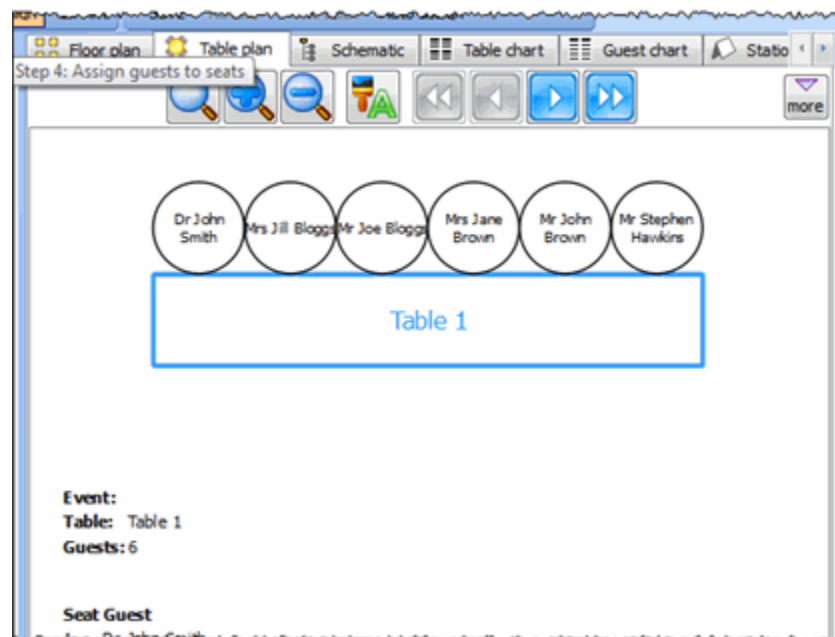


Notice that the locked guests have not been moved and that guests that are assigned to seats are no longer displayed in bold in the  **Guests** and  **Groups** pane.

You can customise the assignments by dragging guests between seats. If you drag a

guest to a seat occupied by another guest they will swap seats.



You may wish to use the  **Table plan** pane, which displays just one table at a time with an optional legend. Use the  navigation buttons to change table.




Next: [6. Assess plan >>](#)

## 4.7 6. Assess plan

Note You can also view this tutorial as a movie [on our website](#).

For an alternative view of the table plan look at the  **Schematic** pane. It shows the same information in a different format. It doesn't show the positioning of tables, but it does show the [scoring](#). Click the  button and check the **show scores** check box. The higher the score, generally the better the plan. In the example below (which may be different to yours) you can see that Jason Jones has a total score of +4 made up of:

+5 for being next to Mrs Nicola Jones with  proximity

+2 for being on same table as Mr William Jones with  proximity

-5 for being on same table to Miss Natasha Jones with 🧑 proximity

+2 for being a male next to a female

= +4 total

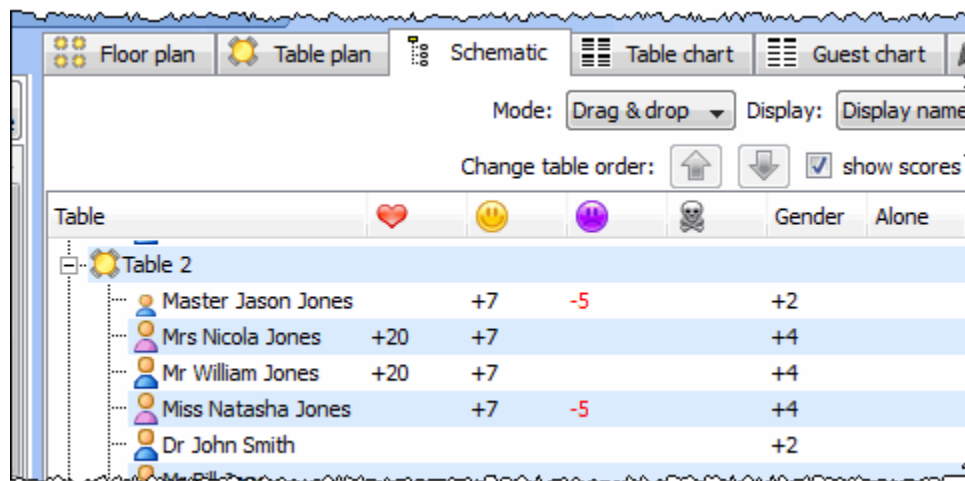



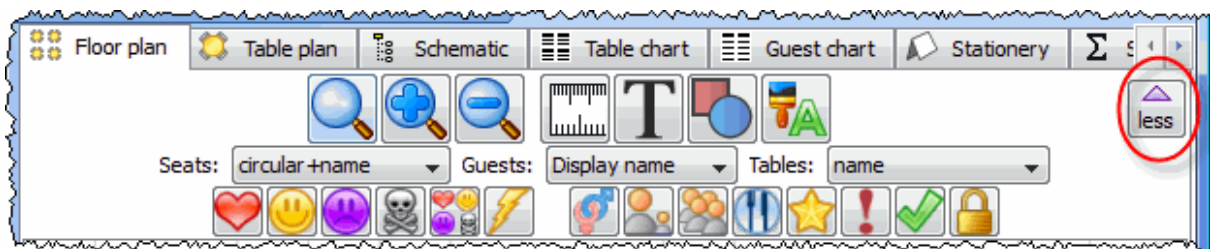








Table	Icons	Gender	Alone
Table 2			
Master Jason Jones	+7 -5	+2	
Mrs Nicola Jones	+20 +7	+4	
Mr William Jones	+20 +7	+4	
Miss Natasha Jones	+7 -5	+4	
Dr John Smith		+2	

⚠️ **Auto assign seats** tries to find the highest scoring layout. You can run it as often as you like. Each time it will start with the current plan and attempt to improve it. If you don't like the changes made by the ⚠️ **Auto assign seats** you can undo them by selecting **Edit** >  **Undo**.

You can also drag guests between seats in the  **Schematic** pane.

Click on the  **Floor plan** pane tab to bring it to the front. Click on the  button, some additional buttons will be shown.



Holding down any of the     buttons will draw lines between guests who have this proximity. Holding down the  button shows all proximities. The lines are coloured according to the proximity, e.g. red for .

Holding down the  button draws lines between guests who are not optimally

placed, for example guests with ☠ proximity who are sat on the same table.

Depress the 🧑 button to show guest genders (blue for male, pink for female).

Depress the 👤 button to show guest age (children are shown smaller).

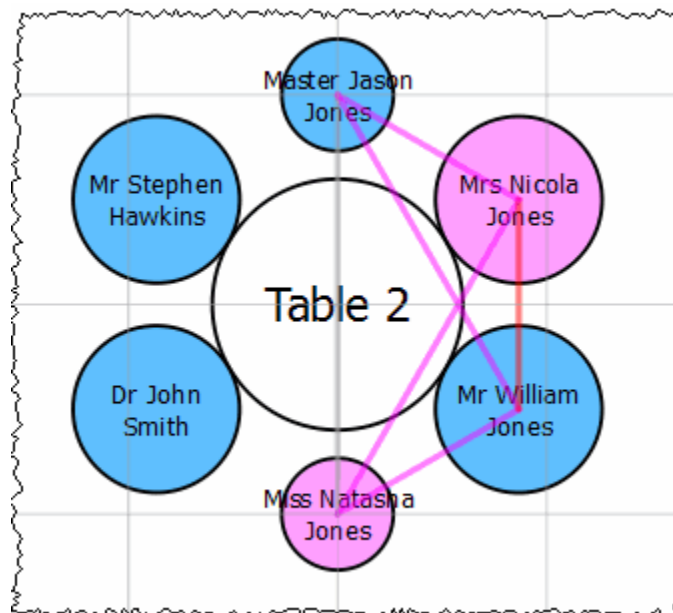
Depress the 🍷 button to show groups (different groups are shown in different colours, up to 100 groups - the colours are selected automatically).

Depress the ⭐ button to show guest and table VIP status (shown with stars).

Depress the 🔒 button to show which guests are locked (a padlock is displayed for locked guests).

Depress the ! button to show any guests with special requirements (i.e. with an entry in their **Special req** field).

Some of the above will be easier to see if you use simple (e.g. default ) [colours](#) in the 🍷Floor plan pane. Note that your layout is likely to be different to the one shown below.




Gender (colour), age (size) and proximity (lines) are displayed.

Using these buttons allows you to easily see whether moving guests to different seats could improve your table plan. Try dragging some of the guests to different

seats. But keep an eye on the score in the Status bar to make sure that making some things better doesn't make other things worse.

You can also see a useful summary of your plan in the  $\Sigma$ Statistics pane.

If you want to try to create a more realistic table plan, try loading one of the example plans installed with PerfectTablePlan (select **File**>Open).


See also:



[Creating a good table plan](#)

Next: [7. Print plan >>](#)

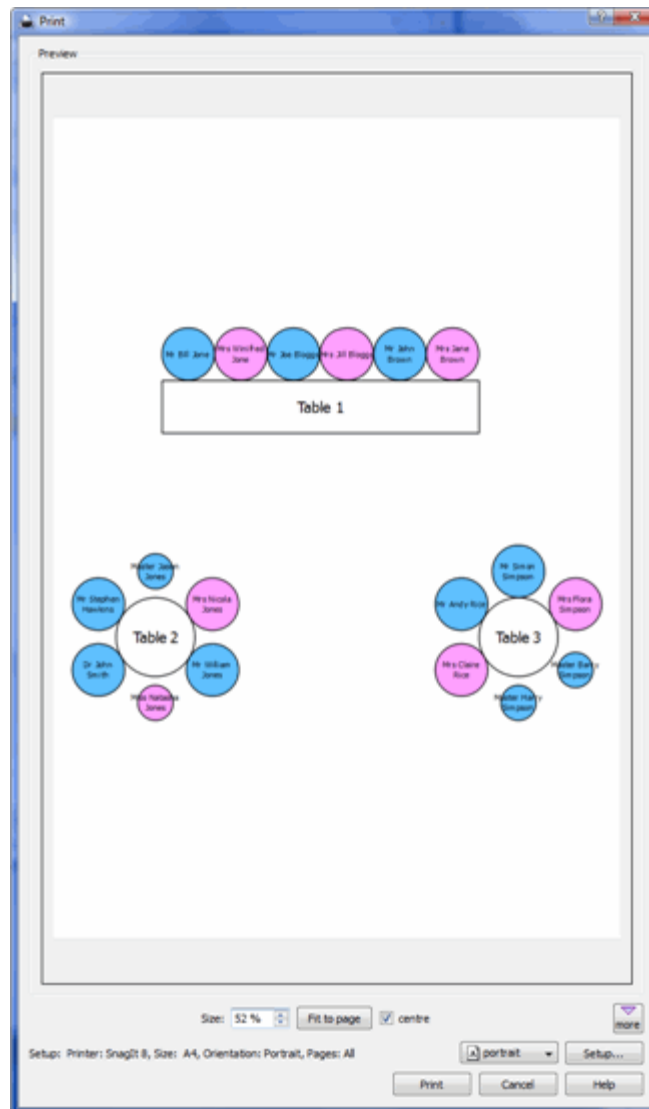
## 4.8 7. Print plan

Note You can also view this tutorial as a movie [on our website](#).

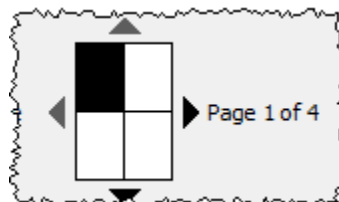
The next step is to print and/or export your table plan. Click on the 5.Print button in the **Task** tool bar.

Select **File**>Print or the equivalent **Main** tool bar button to print the front tab in the **Top** pane. The Print window will appear.





Increase the **Size** until the plan will be printed across 4 pages (setting it to 100% should be about right). Click on the navigation control to preview different pages.



Click on **Fit to page** to fit the plan on a single page.

Click on the **Setup** button to change printer settings, for example to select the

printer (if more than one is available), paper size, print resolution etc. The controls available on the Windows will depend on the pane you are printing. Click on the **Print** button to print.

Print the 🗺️ **Floor plan** pane to see the overall layout of the tables and guests.

Print the 📊 **Table plan** pane for details of individual tables.

Print the 📊 **Table chart** pane to see your plan ordered by table.

Print the 📊 **Guest chart** pane to see your plan ordered by guest or group (sorted by their last name).

Print the 📊 **Statistics** pane for an overview of numbers at your event.

You can copy the contents of the 🗺️ **Floor plan**, 📊 **Table plan**, 📊 **Table chart**, 📊 **Guest chart** or 📊 **Statistics** panes into the clipboard using **Edit>📋 Copy**, for example to paste into Microsoft Word or Excel.

You can also export these panes using **File>📄 Export**, for example to email or put on a web page. You can also use **File>📄 Export** to export for use in another application, for example to create custom reports.

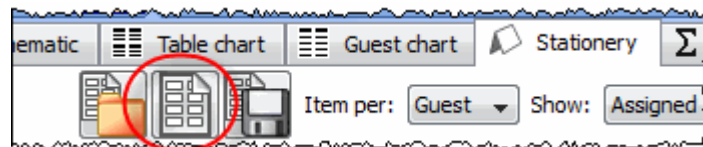
Next: [8. Print stationery >>](#)

## 4.9 8. Print stationery

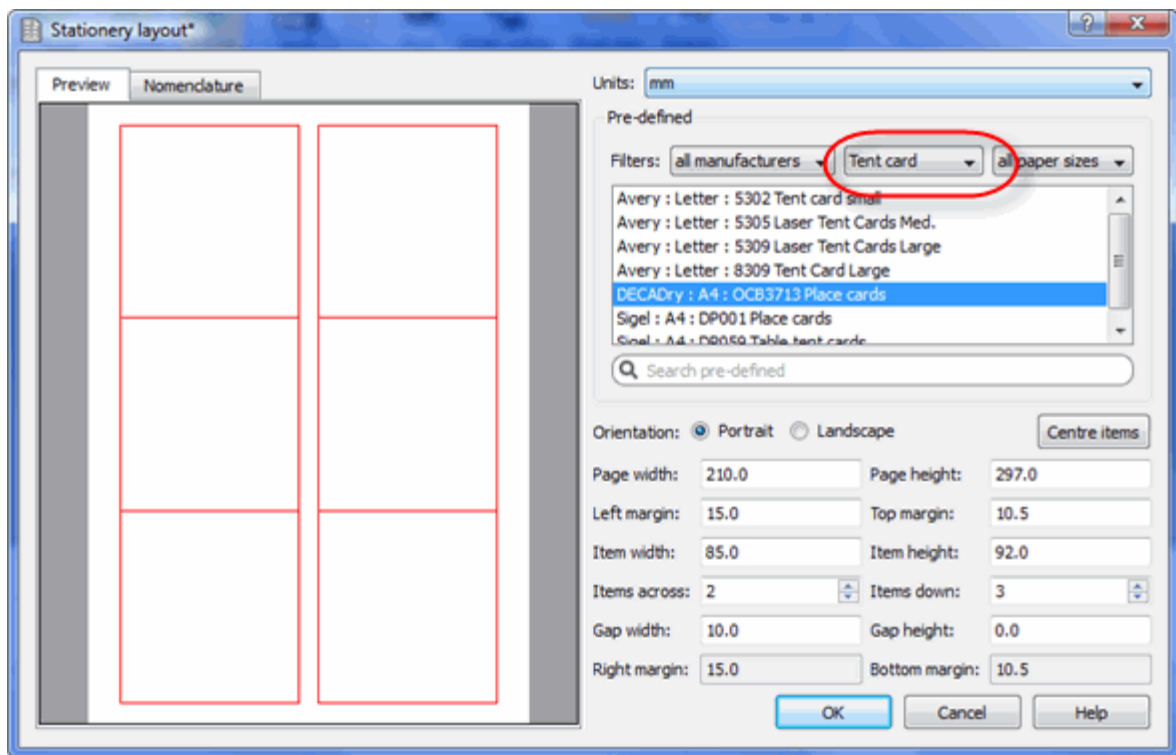
Note You can also view this tutorial as a movie [on our website](#).


You can use the 📄 **Stationery** pane to print place cards, tickets, badges, escort cards, invitations, thank you letters etc. We are going to create some place cards.

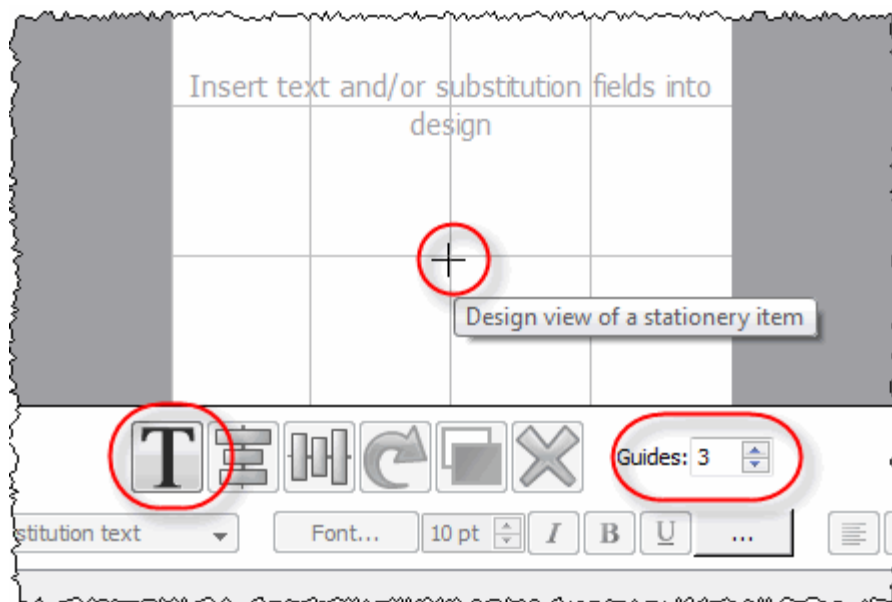
Bring the 📄 **Stationery** pane to the front. Click on the 📄 **Stationery layout** button.



The **Stationery layout** window will appear. From the filters select **Tent card** and then click on the **DecaDry** place cards. Click **OK**.

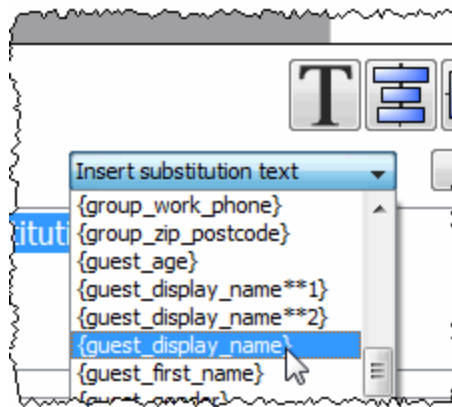


Set the number of **Guides** to 3 in the  **Stationery** pane. These help to position the text. Now click on the **T Add text** button. The cursor will change to a crosshair. Click on the bottom centre of the place card (as shown below).

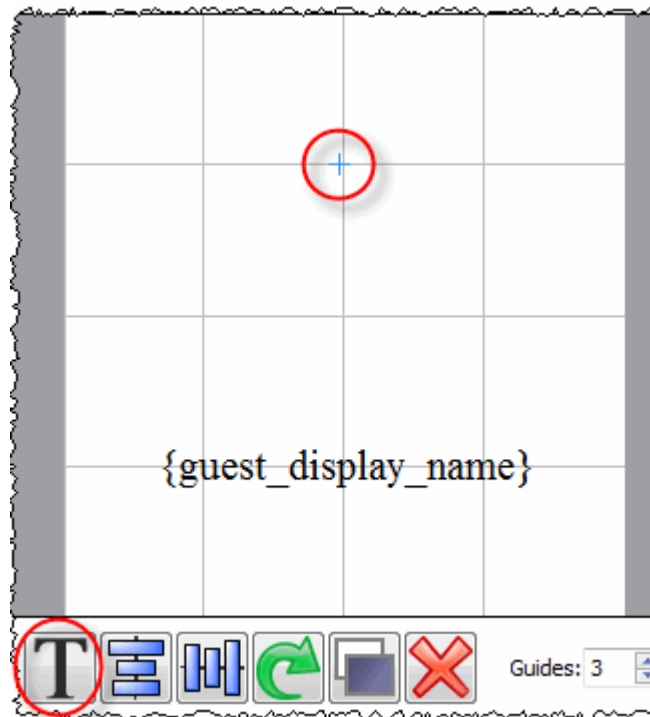


Ensure **Item per** is set to **Guest** (at the top of the pane) and select

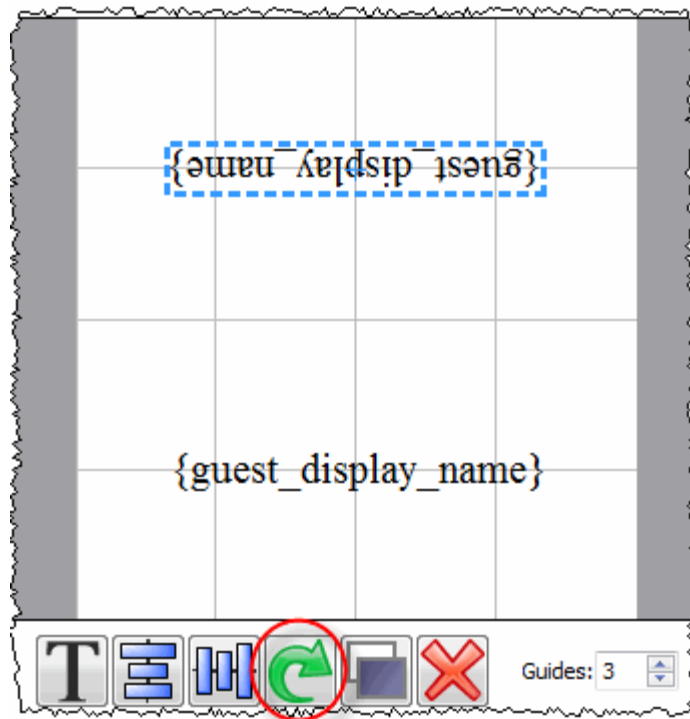
{guest\_display\_name} from Insert substitution text.




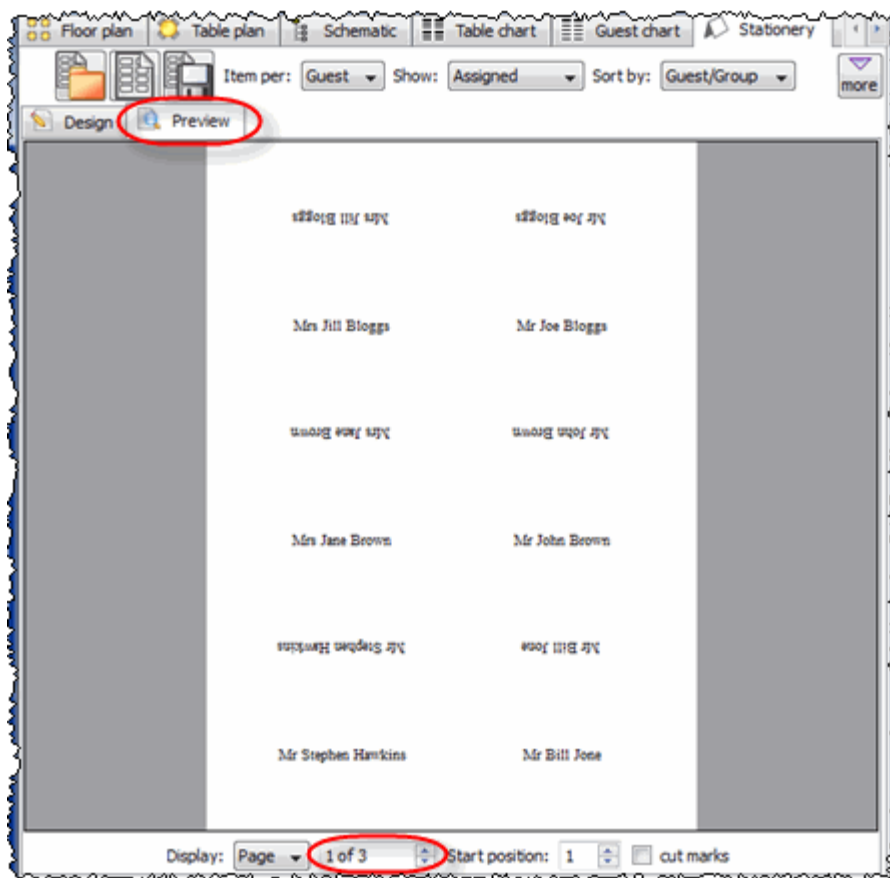
Click the **T** Add text button again. The cursor will change to a crosshair. Click on the top centre of the place card (as shown below).



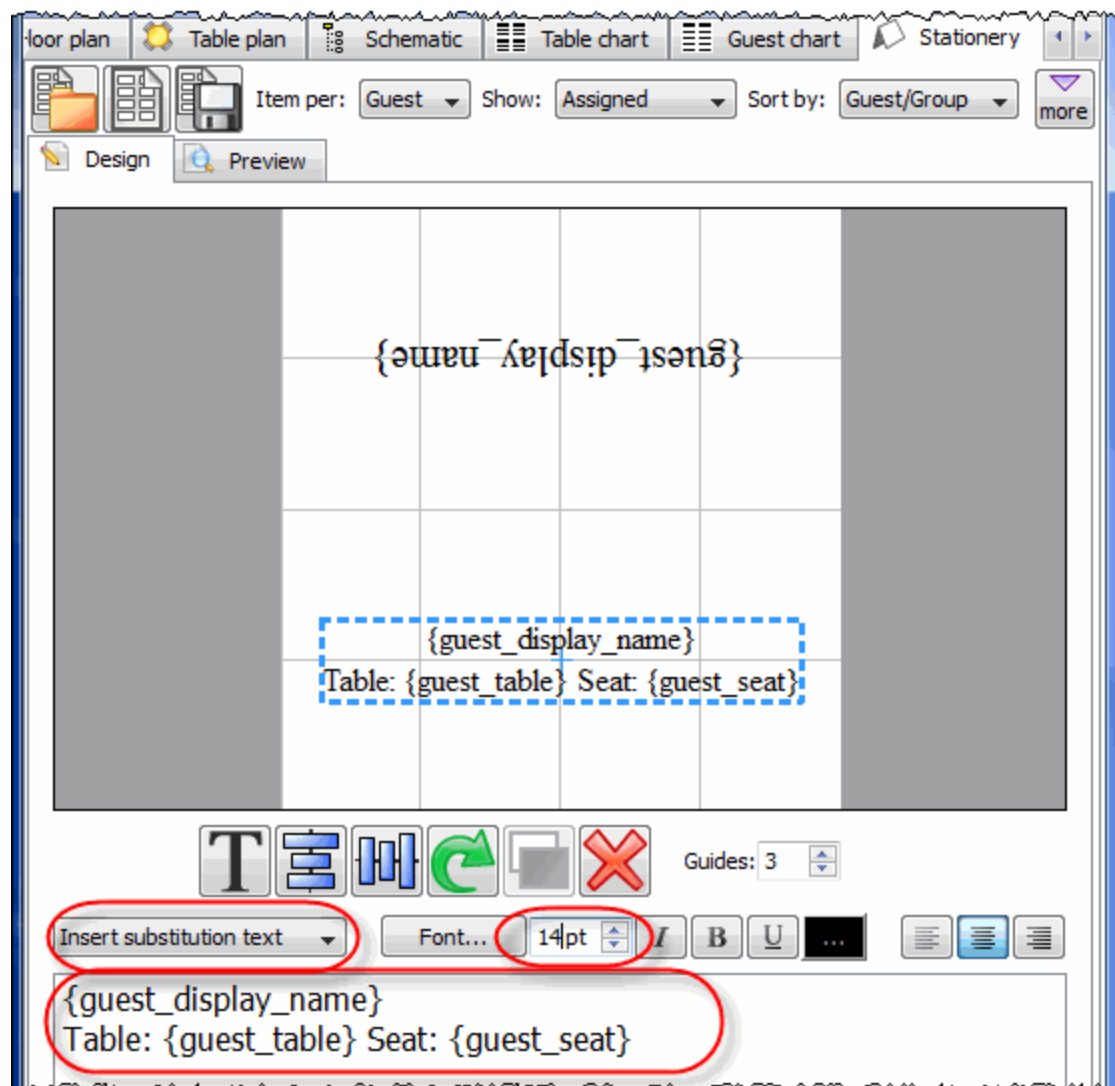
We want the text to be displayed on both sides of the folded tent cards. Select {guest\_display\_name} from Insert substitution text. Click on the **Rotate** button twice.




Click on the  **Preview** tab to preview how the place cards will be printed. Notice that the text inside the curly brackets has been substituted by guest display names. Change the page number to see what each page will look like.




We now want to add additional text to help the staff to lay out the cards. Bring the **Design** tab to the front. Click on the bottom text and add the additional text as below by a combination of typing and using the **Insert substitution text** drop-down. Reduce the font size so the text fits on the card.



Click on the  **Preview** tab to preview the changes.

Click on  **Save stationery** to save this stationery design to use again (perhaps in another plan).

Save your plan using **File> Save**.

To create address labels we would follow a similar approach, but would set **Item per** to **Group** and for the substitution text we could use:

**{group\_name}**

**{group\_contact}**

You can also adapt the [sample stationery](#) we ship with PerfectTablePlan.

Note You can only save, print or export plans with more than 30 guests if you have a [valid licence](#) for the software.

You have now completed the main part of the tutorial. If you want to find out how to import guests whose details you have in a spreadsheet you might also want to do the [Import guests tutorial](#).

Next: [9. Import guests >>](#)

See also:

[Frequently Asked Questions](#)

[Movies](#)

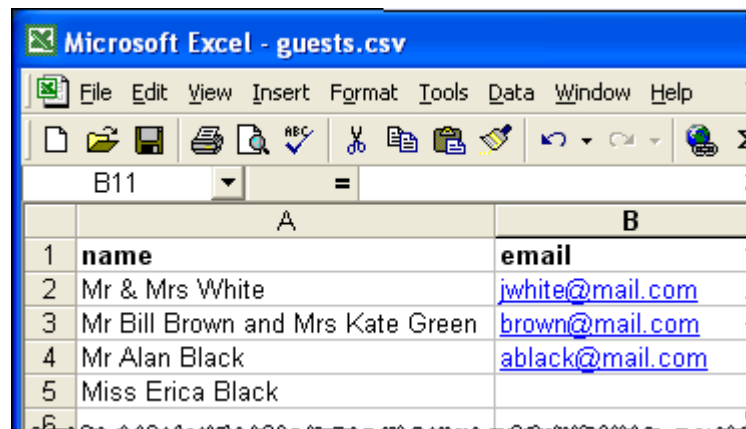
## 4.10 9. Import guests

Note You can also view this tutorial as a movie [on our website](#).

You can import guest details from spreadsheets, databases and other formats, so that you don't have to re-type them. We will illustrate this by importing some guest details from Excel. The principles are similar for other applications and file formats.

Note The user interface of Excel may differ between different versions.

Create a simple Excel spreadsheet like the one below:



The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - guests.csv'. The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons for file operations and editing. The active cell is B11, and the formula bar shows an equals sign. The spreadsheet data is as follows:

	A	B
1	<b>name</b>	<b>email</b>
2	Mr & Mrs White	<a href="mailto:jwhite@mail.com">jwhite@mail.com</a>
3	Mr Bill Brown and Mrs Kate Green	<a href="mailto:brown@mail.com">brown@mail.com</a>
4	Mr Alan Black	<a href="mailto:ablack@mail.com">ablack@mail.com</a>
5	Miss Erica Black	
6		



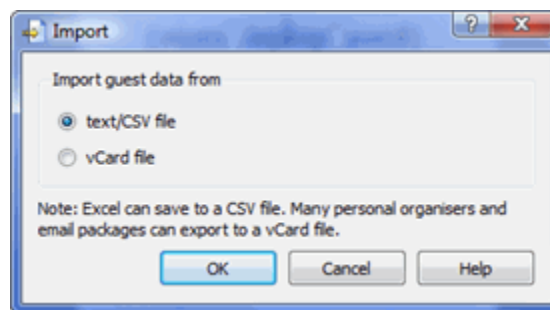
PerfectTablePlan can't read .xls files as they are in a proprietary binary format. Select **File>Save as** and save it as the .csv file `guests.csv` (do not just rename a .xls file to a .csv file). Click **OK** on any windows warning you about changing format.



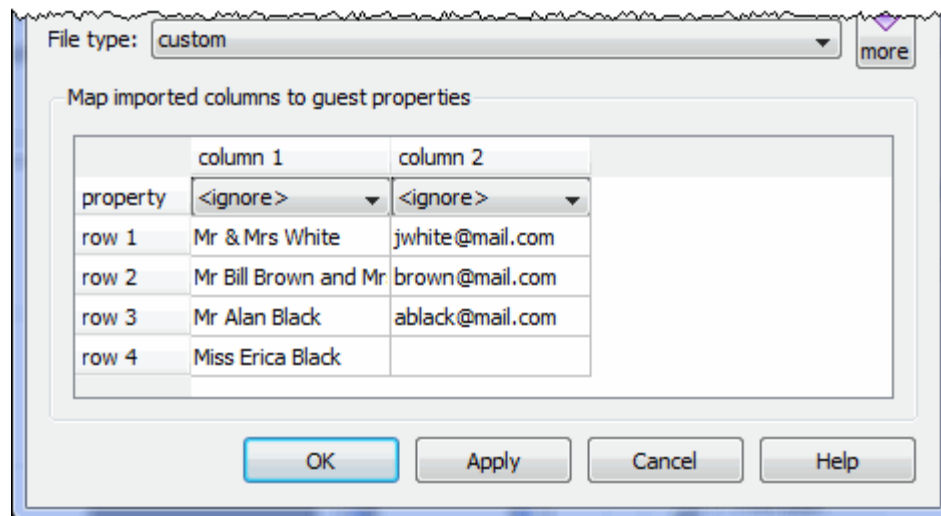
The data is now in a format PerfectTablePlan can read.

If PerfectTablePlan is running create a new plan by selecting **File>New**. Otherwise start PerfectTablePlan.

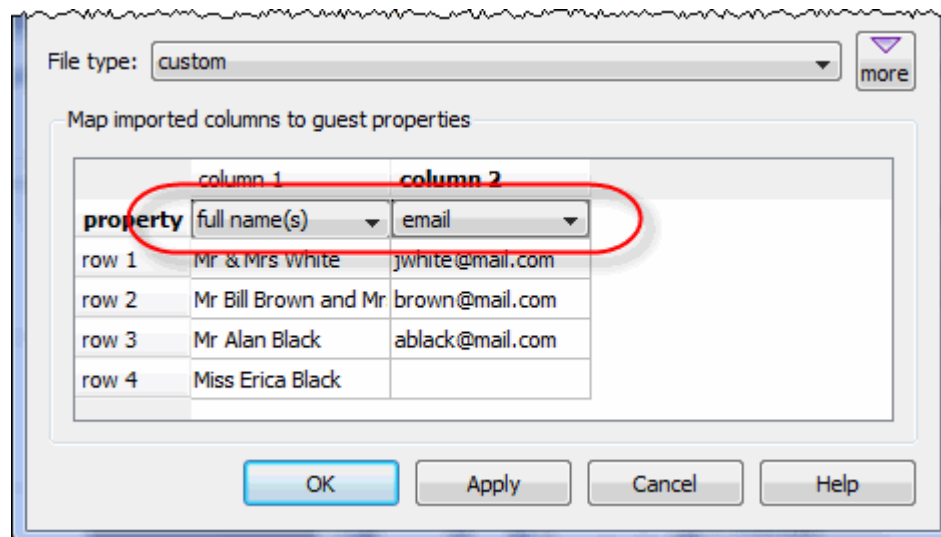
Select **File>Import**. The **Import** window will appear.



Ensure **text/CSV file** is selected and click the **OK** button. An **Open** window will appear. Navigate to the .csv file you just created and click **Open**. You should now see the contents of the Excel file in the **Import data** window.

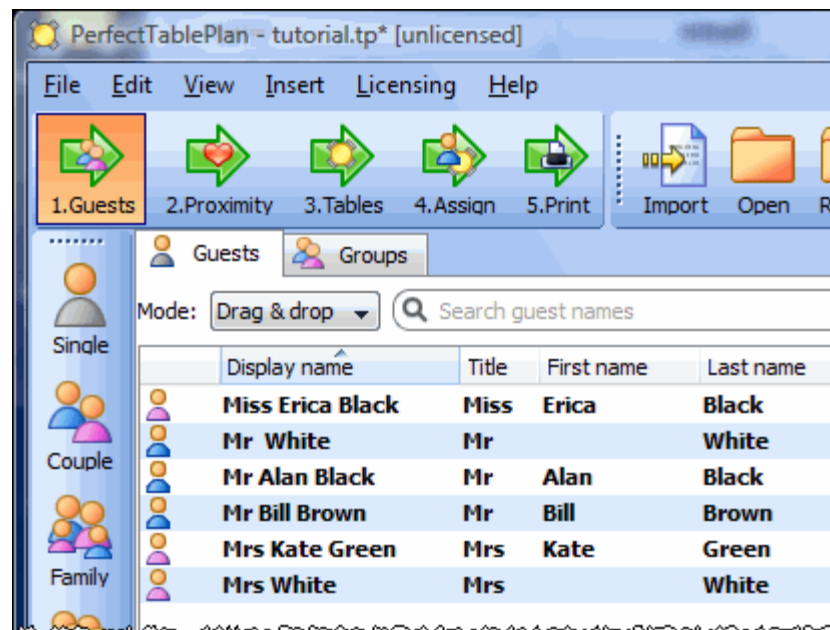


We now need to tell PerfectTablePlan which columns correspond to which guest properties. Select from the drop-down lists as shown below.

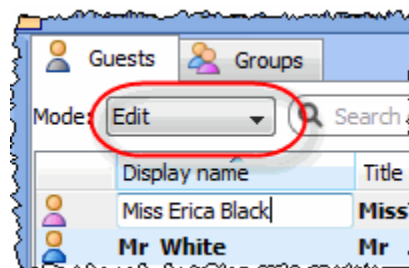


Note that you can edit the data in the table before you import it. This will not affect the original .csv file.

Click the **OK** button. The guests should now be imported as below.

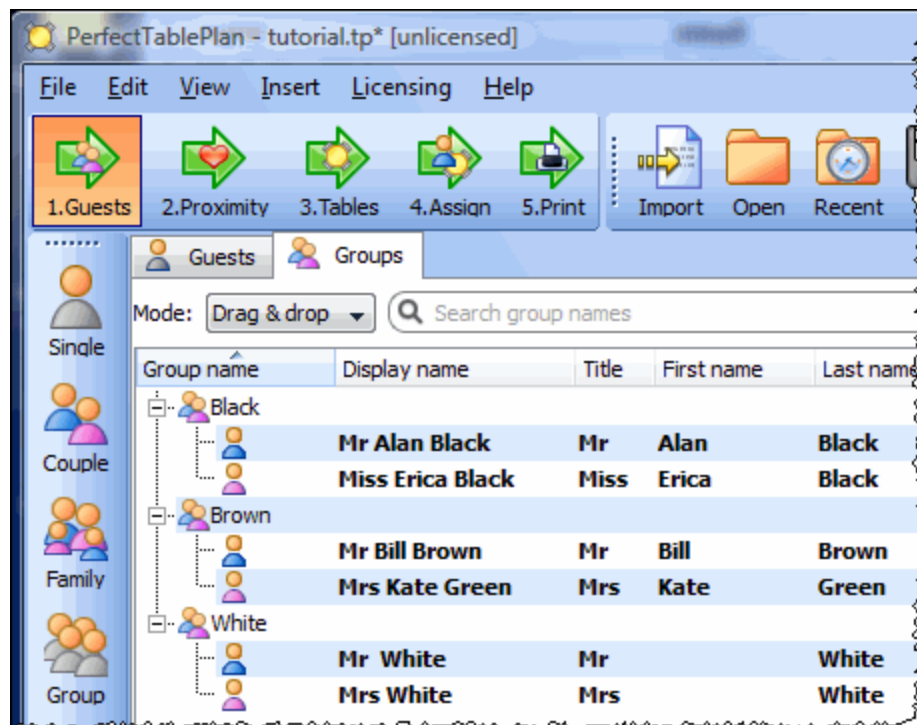


PerfectTablePlan has used [title preferences](#) to extract titles and guess age and gender. If it has guessed anything wrong you can easily change it in Edit mode.



The email address has been added to the guest Contact information.

It has also placed guests into groups. Note that Mr Alan Black and Miss Erica Black have been placed in the same group because they were listed one after the other with the same last name.



If you don't like how they have been grouped you can easily drag guests between groups in **Drag and drop** mode in the **Groups** pane.

If you look in the **Proximity** pane you will see it has set proximity for the guests in each group.

If you want more control over groups you can add a group column to your spreadsheet. You can also specify unnamed guests to import.

Select **File** > **New** to clear the current plan. Click on **Don't save**. Add an additional group column and guest column to your spreadsheet, as below.

	A	B	C	D
1	<b>name</b>	<b>email</b>	<b>group</b>	<b>guests</b>
2	Mr & Mrs White	<a href="mailto:jwhite@mail.com">jwhite@mail.com</a>	family	
3	Mr Bill Brown and Mrs Kate Green	<a href="mailto:brown@mail.com">brown@mail.com</a>	friends	
4	Mr Alan Black	<a href="mailto:ablack@mail.com">ablack@mail.com</a>	friends	1
5	Miss Erica Black		work colleagues	

File>Save as to `guests2.csv` and import into PerfectTablePlan (as above). Select the property drop-down lists as shown below.

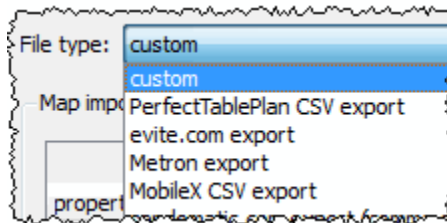
	column 1	column 2	column 3	column 4
<b>property</b>	full name(s)	email	group	num. guests
row 1	Mr & Mrs White	<a href="mailto:jwhite@mail.com">jwhite@mail.com</a>	family	
row 2	Mr Bill Brown and Mr	<a href="mailto:brown@mail.com">brown@mail.com</a>	friends	
row 3	Mr Alan Black	<a href="mailto:ablack@mail.com">ablack@mail.com</a>	friends	1
row 4	Miss Erica Black		work colleagues	



The guests have now been imported in the groups you specified and an unnamed guest has been added for Mr Alan Black.

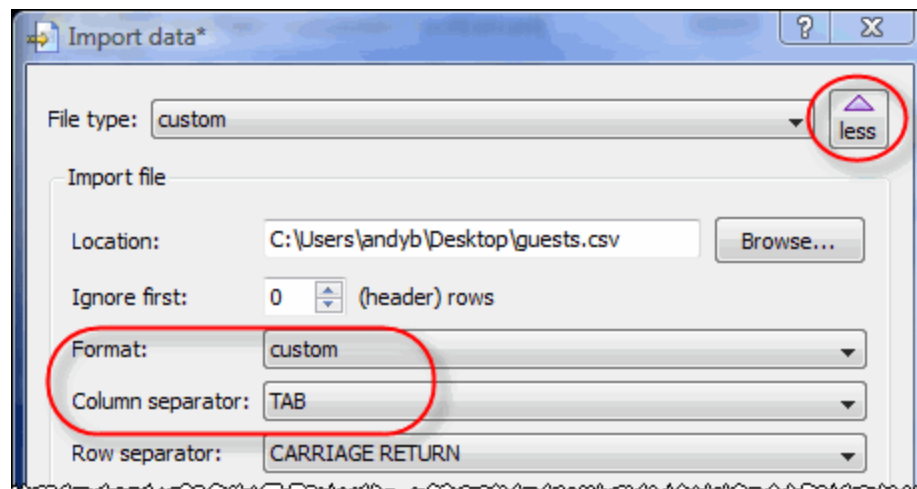
Group name	Display name	Title	First name	Last name
family	Mr White	Mr		White
	Mrs White	Mrs		White
friends	guest of Mr Alan Bl...		guest of Mr Alan Black	
	Mr Alan Black	Mr	Alan	Black
	Mr Bill Brown	Mr	Bill	Brown
	Mrs Kate Green	Mrs	Kate	Green
work colle...	Miss Erica Black	Miss	Erica	Black

You can also import many other properties, such as addresses, meal choice, VIP status, RSVP status etc. See [Import data window](#) for more details.

If you are importing data in a format PerfectTablePlan already knows about you can select the format from the File type menu:



Click on the  button in the  **Import data window** to show additional options. These options give you full control over how the import file is interpreted. For example you can specify that columns in the import file are separated by *Tab* characters, rather than commas:



Note If your spreadsheet contains non-ASCII characters (e.g. Chinese or other Unicode characters) these may be lost when you save your Excel .xls file to a .csv file. To avoid this problem save as **Unicode text (\*.txt)** and import using **Custom** format and a **TAB** delimiter.

You can also import guest name data using the simpler (but less flexible) [Insert guests scratch-pad window](#).

You can also import guests from any application that supports vCard format. This includes many email and address book applications. Just drag the guest vCard(s) on

to the PerfectTablePlan  **Guests** pane.

This concludes the tutorial.

See also:

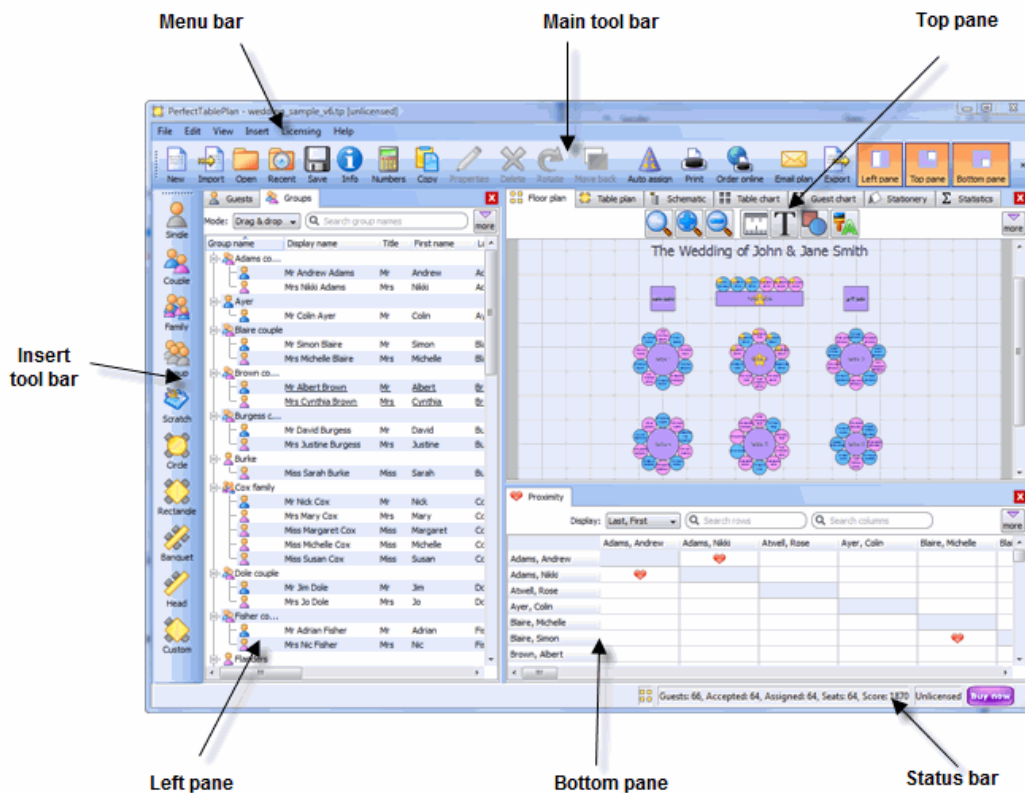
[Frequently Asked Questions](#)

[Movies](#)

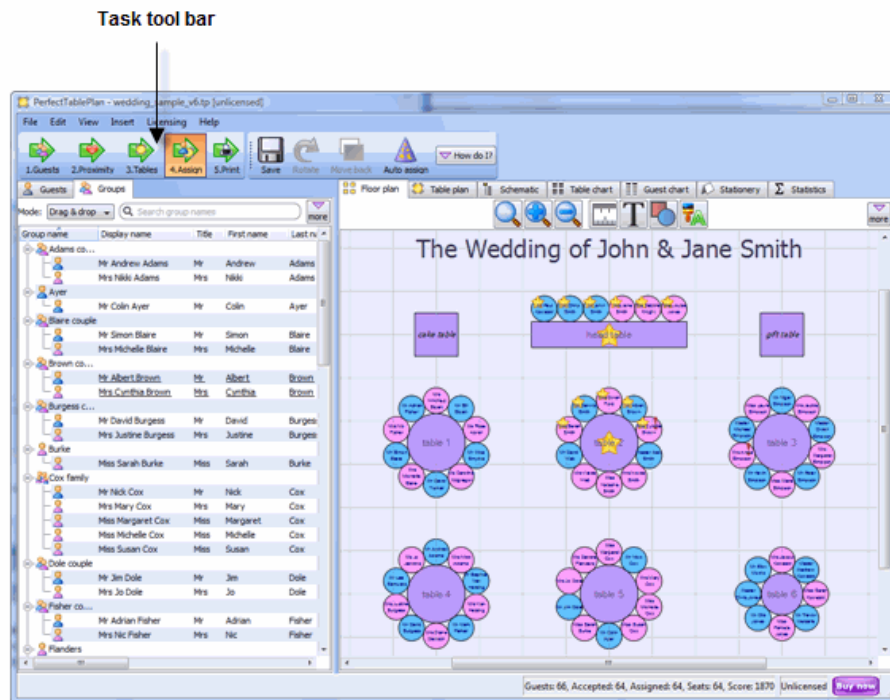
[How do I?](#)

## 5 User interface

### 5.1 Main window



The Main window in expert mode ( View>User interface>Expert ).



The Main window in basic mode ( View>User interface>Basic ).

This is the main window of the application. Use the buttons at the top of the window to minimise, maximise or close it.

Which panes and tool bar buttons are displayed will depend on whether **View>User interface>Basic** or **View>User interface>Expert** is selected.

See also:

[Menu bar](#)

[Task tool bar](#)

[Main tool bar](#)

[Insert tool bar](#)

[Status bar](#)

[Left pane](#)



[Top pane](#)

[Bottom pane](#)

[Windows](#)

[Drag and drop](#)

## 5.2 Menu bar

Use the **Menu** bar to access various actions supported by the software.

The **File** menu supports various actions on the current plan file.

The **Edit** menu supports various edit actions. Apart from **Undo/Redo** and **Copy** these act on the selected items in the most recently selected pane (the icon for this pane is shown in the [Status bar](#)).

The **View** menu allows you control which elements of the user interface are visible.

The **Insert** menu allows you to insert new guests and tables into your plan.

The **Licensing** menu allows you to add or update your licence key.

The **Help** menu allows you to access various forms of help information.






Hint You can use keyboard shortcuts to access menu items. For example to access **File>Exit** without using the mouse type **⌘+Q**.

## 5.3 Task tool bar

The **Task** tool bar takes you through each stage of creating a table plan. Depending on which stage is selected some panes and tool bar buttons will be hidden.

The **Task** tool bar is only displayed if **View>User interface>Basic** is selected.





Button	Meaning
--------	---------




	Step 1: Add guests to plan
	Step 2: Decide who to sit together/ apart
	Step 3: Add tables to plan
	Step 4: Assign guests to seats
	Step 5: Print/export plan


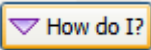
#### 5.4 Main tool bar

Use the **Main** tool bar to access common actions. All of these actions are also available through the [Menu bar](#). Many of them are also available as keyboard accelerators, for example **⌘+O** opens an existing plan file. Look at the **Menu** bar to see the keyboard accelerators.

Note All of the **Main** tool bar icons are only displayed if you have selected **View>User interface>Expert**. Otherwise only icons appropriate to the current task are displayed.

Button	Meaning
	New plan
	Import guest information
	Open existing plan
	Open recently accessed plan

	Save plan
	<a href="#">Information window</a>
	<a href="#">Numbers and budget window</a>
	<a href="#">Copy to clipboard</a> contents of top pane
	Show/edit properties of selected item
	Delete selected item(s)
	<a href="#">Automatic seat assignment</a>
	Print <a href="#">Top pane</a>
	Order plan online
	<a href="#">Email</a> plan as an attachment (not available on Mac)
	Export plan in various formats
	Show/hide <a href="#">Left pane</a>
	Show/hide <a href="#">Top pane</a>







	Show/hide <a href="#">Bottom pane</a>
	Show list of tasks you might need help with





Hint Hover the mouse cursor over a tool bar button to get a tool tip window explaining the action. You can turn tool tips on/off in the [Preferences window](#).


## 5.5 Insert tool bar

Use the **Insert** tool bar to add guests and tables. All of these actions are also available through the [Menu bar](#). Many of them are also available as keyboard accelerators, for example **⌘+G** inserts a new single guest. Look at the **Menu** bar to see the keyboard accelerators.

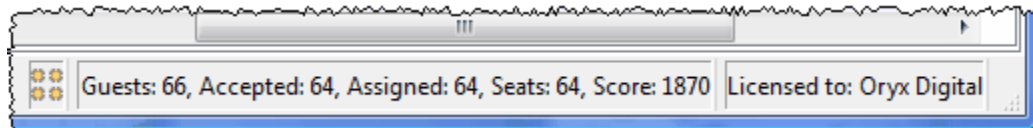
Note All of the **Insert** tool bar icons are only displayed if you have selected **View>User interface>Expert**. Otherwise only icons appropriate to the [current task](#) are displayed.

Button	Meaning
	Insert single guest
	Insert guest couple
	Insert guest family
	Insert guest group
	Insert guests scratch-pad
	Insert circular table


	Insert rectangular table
	Insert banquet table
	Insert head table
	Insert custom table

Hint Hover the mouse cursor over a tool bar button to get a tool tip window explaining the action. You can turn tool tips on/off in the  [Preferences window](#).

## 5.6 Status bar







The **Status** bar shows various useful information:

- a description of any menu item or tool bar button currently being hovered over or selected
- the icon for the currently selected pane (where **File>Edit>**  **Delete** and other operations will be carried out)
- the total number of guests, the number of guests with RSVP accepted, the number of guests assigned to a seat, the number of seats and the [score](#)
- whether the software is [licensed](#) (and a **Purchase licence** button, if it isn't)

## 5.7 Left pane

### 5.7.1 Left pane

The **Left** pane contains the  [Guests pane](#) and  [Groups pane](#). These are two different views of the guests in your plan.

If **View>User interface>Expert** is selected you can hide this pane by clicking on the  button at top-right of the pane or using **View>** **Left** pane or the equivalent **Main** tool bar button.

You can resize this pane using the splitter between it and the other two panes.



### 5.7.2 Guests pane

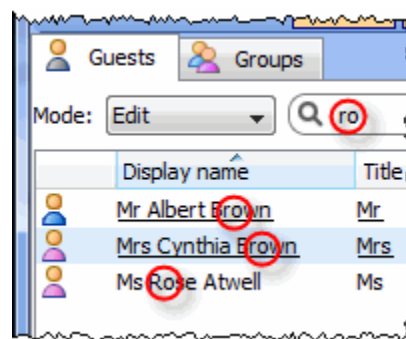
The  **Guests** pane shows all the guests in the current plan as individuals.

The icon shown for a guest is determined from the details you have entered about their gender and age.


Guests who have declined or cancelled are shown with ~~strikethrough~~ text. Guests who have not been assigned to seats are shown in **bold**. Guests who are locked are shown with underlined text.

Select from the **Mode** drop-down list to change the behaviour of the pane (see below).

Type text in the  **Search** field to find guests by name. The default behaviour is to hide non-matching names. E.g. if you type **jo** it will hide all guests without **jo** in their name (case is ignored). Click the  cancel icon to clear the field.





You can change the behaviour to jump to the first matching name by changing **Guest/group search** in the **Preferences** window to **selects first match**. E.g. if you type **jo** it will first try to find a guest with a name beginning with **jo** (e.g. **john**) and if it can't find one it will try to find a guest whose name contains **jo**.

Click on the  button to allow you to choose which columns are displayed.

Click on any of the column headers (for example on **Display name**) to sort by that column. Clicking a column again reverses the sort order.

*Ctrl*+click on a guest to display actions in a pop-up menu.

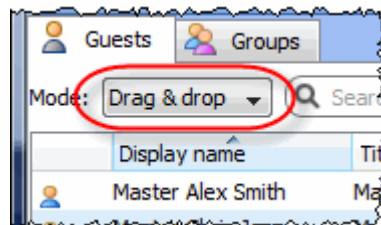
Note that changing the RSVP status of a guest from  **Accepted** may unassign them from their seat, depending on your settings in the  [Preferences window](#).




Drop a plan file onto this pane to open it. Drop a vCard, text or CSV file onto this pane to [import](#) it.

Drag a guest from another PerfectTablePlan window to add them to the current plan.

## Mode

### drag & drop





Left click on one or more a guests and drag them to a seat or table in the  [Floor plan](#) pane,  [Table plan](#) or  [Schematic](#) pane to assign them to a seat. Hold down the *Shift* key to also drag all the other members of their group.

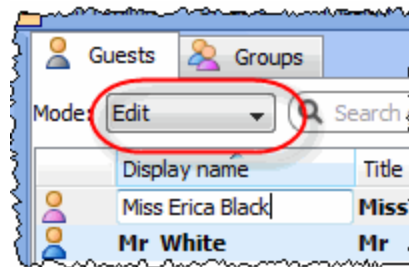
Edit guest properties by double-clicking on them or *Ctrl*+click and select **Properties** from the pop-up menu.

*Ctrl*+click on a guest to display actions in a pop-up menu.

Double-click on a guest to display the **Properties** window.

Select more than one guest by using *Shift*+click or +click. Use +A to select everything in this pane.

### edit




Click on a guest property to edit it.

Use the Enter, Tab or **⌘**+arrow keys to change row or column. Use the *Space* or *arrow down* keys to edit a drop-down list.

See also: [Add or remove dots at the end of titles](#)

### 5.7.3 Groups pane



The  **Groups** pane shows all the guests in the current plan arranged in their groups.

The icon shown for a guest is determined from the details you have entered about their gender and age.

Guests who have declined or cancelled are shown with ~~strikethrough~~ text. Guests who have not been assigned to seats are shown in **bold**. Guests who are locked are shown with underlined text.

The icon shown for a group is based on PerfectTablePlan's best guess at whether the group is a family, couple etc. The group icon is just a visual cue, it doesn't affect anything else.


Select from the **Mode** drop-down list to change the behaviour of the pane (see below).

Type text in the  **Search** field to find groups by name. The default behaviour is to hide non-matching names. E.g. if you type *j*o it will hide all groups without *j*o in their name (case is ignored). Click the  cancel icon to clear the field.

You can change the behaviour to jump to the first matching group/guest name by changing **Guest/group search** in the **Preferences** window to **selects first match**. E.g. if you type *j*o it will first try to find a guest or group with a name beginning





with jo (e.g. john) and if it can't find one it will try to find a guest or group whose name contains jo.

Click on the  button to allow you to choose which columns are displayed.

Click **Expand all** or **Collapse all** to expand/collapse all the groups.

Check the various check boxes to hide/show columns.

Click on the **Group name** headers to sort groups by that column. Click on one of the other columns to sort by **Group name** and then by the clicked column. Clicking a column again reverses the sort order.

Note that changing the RSVP status of a guest from  **Accepted** may unassign them from their seat, depending on your settings in the  [Preferences window](#).

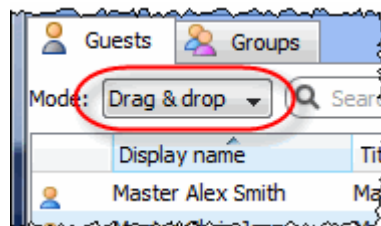
Drop a plan file onto this pane to open it. Drop a vCard, text or CSV file onto this pane to [import](#) it.




Drag a guest from another PerfectTablePlan window to add them to the current plan.


Note Deleting a group deletes all the guests in it.

## Mode

### drag & drop



To assign seats left click on one or more guests or groups and drag them to a seat or table in the  [Floor plan](#) pane,  [Table plan](#) or  [Schematic pane](#).

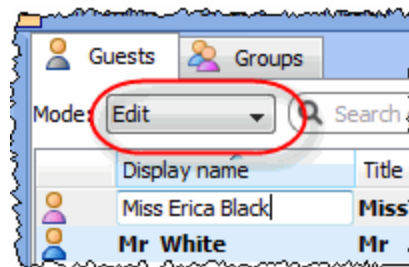
To change group membership left click on one or more a guests or groups and drag them from one group to another within the  **Groups** pane

*Ctrl*+click on a guest or group to display actions in a pop-up menu.

Double-click on a guest or group to display the **Properties** window.

Select more than one guest or group by using *Shift*+click or *⌘*+Click. Use *⌘*+A to select everything in this pane.

## edit



Click on a guest or group property to edit it.

Use the Enter, Tab or *⌘*+arrow keys to change row or column. Use the Space or arrow down keys to edit a drop-down list.

## 5.8 Top pane

### 5.8.1 Top pane

The Top pane contains the [Floor plan](#), [Table plan](#), [Schematic](#), [Table chart](#), [Guest chart](#), [Stationery](#) and [Statistics](#) panes. These are all different views of your plan.

If **View>User interface>Expert** is selected you can hide this pane by clicking on the button at top-right of the pane or using **View>** **Top pane** or the equivalent **Main** tool bar button.




You can resize this pane using the splitter between it and the **Left** pane and the splitter between it and the **Bottom** pane.

### 5.8.2 Floor plan pane


The **Floor Plan** pane shows an 'aerial' view of your table plan. You can only

select one seat or table at a time in this pane.


## Appearance


Clicking on the  and  buttons zooms in and out. Clicking on the  button zooms and scrolls (pans) the display to show all the tables in your plan. When you are zoomed in you can move around by clicking on the scroll bars or by dragging the background (the cursor will change to a hand).


By default the inside of the floor plan is shown in white and the outside of the floor plan is shown in grey.


You can change the floor plan dimensions and units by clicking on the  button. You can also set whether a grid is drawn (and what size) and whether tables, shapes and text are snapped to a grid (and what size).

Click the **T Insert text** button to add text to the floor plan (e.g. a title). We would really appreciate a mention of [www.perfecttableplan.com](http://www.perfecttableplan.com) in the footer!


Click the  **Insert shape** button to add shapes to the floor plan (e.g. to represent dance floors or stages).

Click the  **Rotate** button to rotate the selected table, shape or text item 45 degrees clockwise. For finer control use the **Angle** field in the **Table properties** window.

Click the  **Move to back** button to move the selected item behind (under) others in the vertical stacking order.

Click the  button to change the fonts and colours. The table colour will be overridden by colours set for individual tables through the [Table properties window](#).

Hint If you want to seamlessly join two tables set the inner and outer colours of the table to be the same.

Click on the  button to show additional options.



Select from the **Seats** drop-down list according to how you want seats to be displayed.

Select from the **Guests** drop-down list to change the text that is displayed for assigned seats.

Select from the **Tables** drop-down list according to what text you want displayed for the table. If you show unassigned seats any unassigned seats may also be highlighted with a red cross, depending on the setting for **Seats**.

## Changing the Floor plan

New tables are inserted in a vacant space near the current centre of the pane. Once a table has been placed you can drag it to any location inside the floor plan.

Guests can be dragged between seats or from the  [Guests pane](#) or  [Groups pane](#) (set the **Left pane Mode** to **drag & drop**). Drop a guest away from a seat or table to unassign them.

Note If you drag a guest on to a seat where another guest is already assigned the guests will swap seats with the guest being dragged.


Double-click on a table or guest to show the **Properties** window.

**Ctrl**+click on a table or seat to display actions in a pop-up menu.

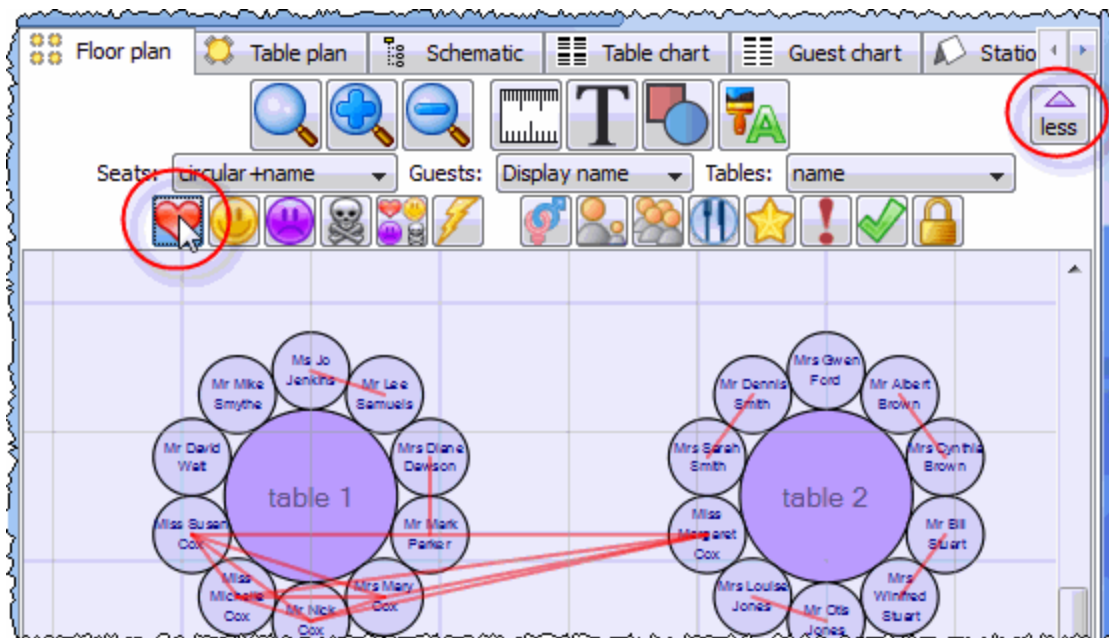
## Assessing your plan



<b>Seat:</b> 2
<b>Name:</b> Mr Chris Smith
<b>Group:</b> Smith family
<b>Gender:</b> male
<b>Age:</b> adult
<b>Meal:</b> beef
<b>RSVP:</b> Accepted
<b>VIP:</b> Yes
<b>Locked:</b> Yes
<b>Notes:</b> Best man

When you hover the mouse cursor over a table or assigned seat a tool tip window with summary information will appear. You can turn these tool tips on/off in the  [Preferences window](#).

Hold down the  button to show all guests that should be sitting next to each other.



Hold down the 😊 button to show all guests that should be sitting near to each other.

Hold down the 🙄 button to show all guests that should not be sitting next to each other.

Hold down the 💀 button to show all guests that should be not be sitting near to each other.

Hold down the 💖 button to show all guest proximities.


Hold down the ⚡ button to show all non-optimal seating arrangements, e.g. guests that should be sitting next to each other that aren't.

Depress the 🧑 button to show the gender of guests (blue for male, pink for female).


Hint It is easier to see proximities if the 🧑 button is not depressed.

Depress the 👤 button to show the age of guests (large circle for adult, small circle for child).


Depress the 🍷 button to show which groups guests belong to. The seats are colour coded for up to 100 groups (and then repeat the colour sequence).


Depress the  button to show colour-coded meal choices. Each meal is displayed in a different colour (up to 10 colours). If you have more than one course (e.g. “soup,fish,ice cream”) the courses will be displayed as concentric rings: outer ring=first course, second ring=second course etc.


Note The colours for the groups and meals visualisations are chosen automatically - you can't change them. The colours should be distinguishable even for people with most types of colour blindness.

Depress the  button to show VIP guests and VIP tables.

Depress the  button to show guests with special needs.

Depress the  button to show guest RSVP status.




Depress the  button to show locked guests.

Hint Some of the above will be easier to see if you use simple (e.g. default ) [colours](#) in the  **Floor plan** pane.


## Keyboard accelerators

You can change the selected table or seat using *Alt+Left arrow* and *Alt+Right arrow* (change table) and *Alt+Up arrow* and *Alt+Down arrow* (change seat).




## Printing, copying and exporting

When you are happy with the layout you can print this page with **File>Print**. You can also [export the image](#) as a [PDF, PNG, BMP or JPEG](#) file using **File>Export** or [copy it to the clipboard](#) using **Edit>Copy**.


### 5.8.3 Table plan pane

The  **Table Plan** pane shows a single table, with an optional legend (text). You can only select a single seat or table in this pane. The legend cannot be selected.

## Appearance


Clicking on the  and  buttons zooms in and out. Clicking on the  button zooms and pans the display to show all the contents. When you are zoomed in you

can move around by clicking on the scroll bars or by dragging the background (the cursor will change to a hand).

Click the  button to change the fonts and colours. The table colour will be overridden by colours set for individual tables through the [Table properties window](#).

Hint If you want to hide table names in the floor plan just set the colour of the table font to the same as the colour of the table.

Click on the     buttons to display the first, previous, next or last table.


Click on the  button to show additional options.

Select from the **Arrow** to drop-down list to display a directional arrow. This arrow can point up, right, down, left or to any table. Note the arrow will not be displayed if it is set to point to the current table.

Select from the **Seats** drop-down list according to how you want seats to be displayed.

Change the **Guests** drop-down to change the text that is displayed for assigned seats.

Check the **legend** check box to show the text legend. Check the **header**, **seat numbers**, **VIP**, **gender**, **age**, **meal**, **special** or **notes** check boxes to show the corresponding information in the legend.

Note The **Event:** entry in the legend is set in the  [Information window](#).

## Changing the Table plan

Guests can be dragged between seats or from the

 [Guests pane](#) or  [Groups pane](#) (set the **Left pane Mode** to **drag & drop**). Drop a guest away from a seat or table to unassign them.


Note If you drag a guest on to a seat where another guest is already assigned the guests will swap seats with the guest being dragged.


Double-click on a table or guest to show the **Properties** window.


*Ctrl*+click on a table or seat to display actions in a pop-up menu.


## Assessing your plan

Seat: 2
Name: Mr Chris Smith
Group: Smith family
Gender: male
Age: adult
Meal: beef
RSVP: Accepted
VIP: Yes
Locked: Yes
Notes: Best man


When you hover the mouse cursor over a table or assigned seat a tool tip window with useful information will appear. You can turn these tool tips on/off in the  [Preferences window](#).


Hold down the  button to show all guests that should be sitting next to each other.

Hold down the  button to show all guests that should be sitting near to each other.

Hold down the  button to show all guests that should not be sitting next to each other.

Hold down the  button to show all guests that should be not be sitting near to each other.

Hold down the  button to show all guest proximities.


Hold down the  button to show all non-optimal seating arrangements, e.g. guests that should be sitting next to each other that aren't.

Note Only the proximities for guests on the current table are shown.


Depress the  button to show the gender of guests (blue for male, pink for female).

Hint It is easier to see proximities if the  button is not depressed.



Depress the  button to show the age of guests (large for adult, small for child).


Depress the  button to show which groups guests belong to.


Depress the  button to show colour-coded meal choices. Each meal is displayed in a different colour (up to 10 colours). If you have more than one course (e.g. “soup,fish,ice cream”) the courses will be displayed as concentric rings: outer ring=first course, second ring=second course etc.


Note The colours for the groups and meals visualisations are chosen automatically - you can't change them. The colours should be distinguishable even for people with most types of colour blindness.

Depress the  button to show VIP guests.

Depress the  button to show guests with special needs.

Depress the  button to show guest RSVP status.




Depress the  button to show locked guests.

Hint Some of the above will be easier to see if you use simple (e.g. default ) [colours](#) in the  **Table plan** pane.


## Keyboard accelerators

You can change the selected table or seat using *Alt+Left arrow* and *Alt+Right arrow* (change table) and *Alt+Up arrow* and *Alt+Down arrow* (change seat).

## Printing, copying and exporting

When you are happy with the layout you can print this page with **File>** **Print**. You can also [export the image](#) as a [PDF, PNG, BMP, JPEG](#) file using **File>** **Export** or [copy it to the clipboard](#) using **Edit>** **Copy**.


### 5.8.4 Schematic pane


The  **Schematic** pane shows the table plan in an abstract form that is convenient for browsing. It also optionally shows the assignment [scoring](#).



Guests who have declined or cancelled are shown with ~~strikethrough~~ text. Guests who are locked are shown with underlined text.

Select from the **Mode** drop-down list to change the behaviour of the pane (see below).

Change the **Display** drop-down list to change the way in which the names of assigned guests are displayed.

The order of the tables can be changed by clicking on **Table order** button to display the  [Table order window](#).

Click on the  button to show additional options.





New tables are added at the bottom of the pane. You can change the position of a table in the order by dragging it. Alternatively, select the table and use the  and  buttons at the top of the pane to move the table up or down the order.

Check the **show scores** check box to show the assignment scores.



Click **Expand all** or **Collapse all** to expand/collapse all the tables.

## Mode

### drag and drop

Drag one or more guests to a seat or table within in the  **Schematic** pane to re-assign their seat. Hold down the *Shift* key to also drag all the other members of their group. You can also drag guests from the  [Guests pane](#) or  [Groups pane](#) to the  **Schematic** pane.

Note If you drag a guest on to a seat where another guest is already assigned the guests will swap seats.

Drag a table within the  **Schematic** pane to change the order in which it is displayed here and in the  [Table chart](#) pane.

Edit guest or table properties by double-clicking on them or *Ctrl*+click and select **Properties** from the pop-up menu.

*Ctrl*+click on a guest or table to display actions in a pop-up menu.

Double-click on a guest or table to display the **Properties** window.


Select more than one guest or table by using *Shift*+click or *⌘*+Click. Use *⌘*+A to select everything in this pane.

## edit

Click on a guest locked column or table name to edit it.

Use the *Enter*, *Tab* or *⌘*+arrow keys to change row or column. Use the *Space* or *arrow down* keys to edit a drop-down list.

### 5.8.5 Table chart pane


The  **Table chart** pane shows a seating chart, ordered by table. This can be very useful for displaying at the entrance to an event. Tables with no guests assigned are omitted. It is not possible to change the plan from this pane.

Use the **By** drop-down list to display a line per **Guest** or a line per **Group**.

Use the **Display** drop-down list to change how guest/group names are displayed.

Use the **Sort by** drop-down list to change the way how guests/groups are ordered on each table.



You can also change the number of **Columns** in the chart and control the font and colours by clicking on the  button.


Click on the  button to show additional options.


You can optionally show the **seat**, **notes**, **meal** choice, **special** requirements, **RSVP** status and **group**. The meal choice and special requirements can be very useful for caterers.



Click on the **Title** or **Footer** button to add/edit a title or footer for this pane. The [Chart title/footer window](#) will be displayed. We would really appreciate a mention of [www.perfecttableplan.com](http://www.perfecttableplan.com) in the footer!


The order of the tables can be changed by clicking on **Table order** button to

display the  [Table order window](#). Alternatively, you can change the order in the  [Schematic pane](#). Tables are laid out left to right and then top to bottom.


You can copy the contents of the whole pane to the clipboard as plain text and HTML using **Edit>**  **Copy**. Use right click and **Copy** to copy selected text to the clipboard.

When you are happy with the layout you can print this page with **File>**  **Print**.

You can export the pane as an [Excel CSV, plain text or HTML](#) file using **File>**  **Export** and selecting **table chart to text/CSV/HTML file**. Select **Excel CSV file**, **Text file** or **HTML file** from the **Save as type** drop-down in the  **Export** window. Plain text may be useful for emailing to your stationary supplier. HTML preserves the layout and is useful for web pages and other HTML-aware applications, such as Microsoft Word. CSV files can be opened as Excel spreadsheets.

Hint Use +A to select everything in this pane.

#### 5.8.6 Guest chart pane

The  **Guest chart** pane shows a chart, ordered by guest name (alphabetically by last name then first name). This allows guests to find their table quickly and can be very useful for displaying at the entrance to an event. You can also print off a full guest list. It is not possible to change the plan from this pane.


Use the **By** drop-down list to display a line per Guest or a line per Group.

Use the **Display** drop-down list to change how guest/group names are displayed.

Using the **Show** drop-down list you can display:

- guests who have (or haven't) been assigned to seats; or
- guests who have (or haven't) accepted their invitations; or
- all guests

You can also change the number of **Columns** in the chart and control the font and colours by clicking on the  button.

Click on the  button to show additional options.

You can optionally show the **headers**, **table**, **seat**, **notes**, **meal choice**, **special requirements**, **RSVP** status and **group**. The meal choice and special requirements can be very useful for caterers.

Click on the **Title** or **Footer** button to add/edit a title or footer for this pane. The [Chart title/footer window](#) will be displayed. We would really appreciate a mention of [www.perfecttableplan.com](http://www.perfecttableplan.com) in the footer!

You can copy the contents of the pane to the clipboard as plain text and HTML using **Edit>Copy**. Use right click and **Copy** to copy selected text to the clipboard.

When you are happy with the layout you can print this page with **File>Print**.

You can export the pane as an [Excel CSV, plain text or HTML](#) file using **File>Export** and selecting **guest chart to text/CSV/HTML file**. Select **Excel CSV file**, **Text file** or **HTML file** from the **Save as type** drop-down in the **Export** window. Plain text may be useful for emailing to your stationary supplier. HTML preserves the layout and is useful for web pages and other HTML-aware applications, such as Microsoft Word. CSV files can be opened as Excel spreadsheets.

Hint Use **⌘+A** to select everything in this pane.

#### 5.8.7 Stationery pane

The **Stationery** pane allows you to design and print items of stationery and easily merge in details of your guests and their seating arrangements from your PerfectTablePlan data. Each page can contain a single stationery item (e.g. an A4 invitation letter) or multiple items (e.g. 3x6 address labels).


You design a master for your stationery items in the **Design** tab and preview it in the **Preview** tab.

## Top controls

Click on the **Open stationery** button to load a stationery design. A few samples are included with PerfectTablePlan. You can also save your own designs to use later or send to other PerfectTablePlan users.

Click on the **Stationery layout** button to change the layout of the existing design. For example to change the page size or the number and dimensions of

items on the page.


Click on the  **Save stationery** button to save the current stationery design to a file. You will be able to load this design back into this plan, or another plan, at a later date.

Select from the **Item per** drop-down list to create a stationery item for each guest, each group or each table.

Select from the **Show** drop-down list to choose which guests you wish to create stationery items for.

For example, if you are printing place cards, you probably want to select **Item per=Guest** and **Show=Assigned**. If you are printing invitations you probably want to select **Item per=Group** and **Show=All**.

Select from the **Sort by** drop-down list to determine the order in which stationery items are ordered. This feature should make it easier to set up place cards if you have hundreds of guests. It is only available for **Item per=Guest**.

Click on the  button to show additional options.

Select from the **Fold** drop-down list to a horizontal or vertical fold. This can be useful for designing and printing tent fold cards. Folds are displayed in printouts.


Set the **Border thickness** greater than 0 to add a border to each stationery item.

Click on the **Border colour** button to change the colour of the border around each item. This has no effect if the **Border thickness** is 0.

Click on the **Background colour** button to change the background colour of each item.


## Design tab

To add text to your design:


1. click on the  **Insert text** button
2. click on the area of the design you wish to add the text

3. type in the text you wish to add

4. add substitution fields by selecting from the **Insert substitution text** drop-down list

Click on the  **Horizontal centre** or  **Vertical centre** buttons to horizontally/vertically centre the currently selected text.

Click on the  **Rotate** button to rotate the selected text 90 degrees.

Click on the  **Move to back** button to move the selected text behind any other text.

To delete text click select the text and click the  **Delete** button.

Change the value of **Guides** to the number of guidelines you wish to add to the design. These can be useful for aligning text neatly. They are not shown in printouts.

Click on the **Font** button to change the font of the selected text. Alternatively you can use the **Font size** spin box or the  **Italic**,  **B Bold** and  **U Underline** buttons.

Click on the **Colour** button to change the colour of the selected text.

Click on the  **Left align**,  **Centre align** or  **Right align** buttons to change the alignment of the selected text.

Drag the splitter at the top of the text edit box to increase or decrease the size of the text edit area.

## Preview tab

Select **Display** to show either a full page of items or a single item (e.g. 3x6 address labels or a single address label) and the number of the page/item to display.



Set **Start position** to position on the page where you wish the first item to be printed.

Check **cut marks** if you would like cut marks to be printed on the page. This can be useful if you are using a guillotine to cut the page.

## Substitution text

If you use the following text in your design it will be substituted by the appropriate data from your plan.

In alphabetical order:

Substitution text	Substituted by	Example	Available for 'Item per'
{event_date}	event date from <a href="#"> Information window</a>	31/1/2007	Guest, group or Table
{event_name}	event name from <a href="#"> Information window</a>	Gala dinner	Guest, group or Table
{event_notes}	event notes from <a href="#"> Information window</a>		Guest, group or Table
{event_venue}	event venue from <a href="#"> Information window</a>	The Crown hotel	Guest, group or Table
{group_address}	the address of the group	1 The Street The Town Nowhereshire NW1 123 England	Guest or Group



{group_address1}	line 1 of the group address	1 The Street	Guest or Group
{group_address2}	line 2 of the group address		Guest or Group
{group_country}	the address country	England	Guest or Group
{group_contact}	full contact details of group (address + contact numbers)	1 The Street The Town Nowhereshire NW1 123 England 111-1111-1111 email@email.com	Guest or Group
{group_email}	email address	email@email.com	Guest or Group
{group_home_phone}	home phone number	111-111-1111	Guest or Group
{group_meals}	meals of group members	fish + beef	Guest or Group
{group_members_multi_line}	list of group members, one per line	Mr J Smith Mrs K Smith	Guest or Group
{group_members}	list of group members on one line	Mr & Mrs J Smith	Guest or Group


{group_mobile}	mobile phone number	111-111-1111	Guest or Group
{group_name}	group name	Smith family	Guest or Group
{group_notes}	notes for the group		Guest or Group
{group_special_reqs}	special requirements of group members	wheelchair	Guest or Group
{group_state_county}	the address state/county	Nowhereshire	Guest or Group
{group_tables}	the table(s) the group is assigned to	table 1	Guest or group
{group_town_city}	the address town/city	The Town	Guest or Group
{group_work_phone}	work phone number	111-111-1111	Guest or Group
{group_zip_postcode}	the address zip/postcode	NW1 123	Guest or Group
{guest_age}	guest age	adult	Guest
{guest_display_name}	guest display name	Mr John Smith Master of Ceremonies	Guest
{guest_display_name**1}	guest display name before **	Mr John Smith**Master of Ceremonies -> Mr	Guest


		John Smith	
{guest_display_name**1}	guest display name after **	Mr John Smith**Master of Ceremonies -> Master of Ceremonies	Guest
{guest_first_name}	guest first name	John	Guest
{guest_gender}	guest gender	male	Guest
{guest_last_name}	guest last name	Smith	Guest
{guest_meal}	guest meal	fish	Guest
{guest_notes}	notes for the guest		Guest
{guest_rsvp}	guest RSVP status	Accepted	Guest
{guest_seat}	seat guest assigned to	1	Guest
{guest_special_req}	guest special requirements	visually impaired	Guest
{guest_table}	table guest assigned to	Table 3	Guest
{guest_title}	guest title	Mr	Guest
{guest_vip}	guest VIP status	VIP	Guest
{table_guests_multi_line}	list of guests at table, one guest	Mr J Smith	Table


	per line	Mrs K Smith	
{table_guests}	list of guests at table on one line	Mr & Mrs J Smith	Table
{table_name}	the name of the table	Table 1	Table
{table_name**1}	table name before **	Table1**HeadTable - > Table1	Table
{table_name**2}	table name after **	Table1**HeadTable - > Head table	Table
{table_notes}	notes for the table		Table



Note Text will only be substituted if **Item per** is set to the correct value, e.g. {guest\_title} will not be substituted if you are display **Item per=Table**.

#### 5.8.8 Statistics pane

The  **Statistics** pane shows simple summary statistics for your plan. It is not possible to make changes to the plan from this pane.

You can copy the contents of the whole pane to the clipboard as plain text and HTML using **Edit>  Copy**. Use right click and **Copy** to copy selected text to the clipboard.


When you are happy with the layout you can print this page with **File>  Print**.



You can export the pane as an [Excel CSV, plain text or HTML](#) file using **File>  Export...** and selecting **statistics to text/CSV/HTML file**. Select **Excel CSV file**, **Text file** or **HTML file** from the **Save as type** drop-down in the ** Export** window. Plain text may be useful for emailing to your caterer. HTML preserves the layout and is useful for web pages and other HTML-aware applications, such as Microsoft Word. CSV files can be opened as Excel spreadsheets.

Hint Use **⌘+A** to select everything in this pane.

## 5.9 Bottom pane

### 5.9.1 Bottom pane

The Bottom pane contains the  [Proximity pane](#).

If **View>User interface>Expert** is selected you can hide this pane by clicking on the  button at top-right of the pane or using **View>**  **Bottom pane** or the equivalent **Main** tool bar button.

You can resize this pane using the splitter between it and the **Left** pane and the splitter between it and the **Top** pane.

### 5.9.2 Proximity pane





The  **Proximity** pane shows an abstract view of who should be placed near whom.


Note The table is symmetric, if you change the proximity for column A and row B, the proximity for row B and column A will change automatically.

You can move around the table and change values using the *Arrow* keys, *Space* bar and *Return* key.

Select from **Display** to change how the guest names are displayed.

Use **Search row** and **Search column** to quickly find guest rows and columns. It will first look for a row/column that starts with the text and then one that contains the text.



Default proximity values are set automatically for guests when they are added as a couple, family or group, but you can add to or override as you wish. For example, if you add Mr & Mrs A as a couple they will be automatically assigned proximity  **Next to** (a  will appear in the cells where the columns and rows for Mr A and Mrs A intersect). The [automatic assignment](#) will then try to put them next to each other. To change this proximity to  **Not next to** (perhaps they have had an argument!) click on the cell and select  from the drop-down list.


Click on the  button to show additional options.



Select from Show to:

- **all:** all guests

- **by group:** guests in the selected group
- **by group+:** guests in the selected group and all guests with non-neutral proximity to members of this group

Select from the drop-down list or click on the  and  buttons to change the selected group.

Check **assignable guests only** to show only guests who can be assigned to seats (due to their locked + RSVP status and settings in the  [Preferences window](#)).

Hint If you want to change the proximity for everyone in a group it may be easier to select a group (in the Groups pane) or more than one guest (in the  [Guests pane](#) or  [Groups pane](#)) and then select **Edit>Proximity**.

You can set the proximity for everyone on a table by selecting the table and then **Edit>Proximity**. This can be useful for [arranging multiple seatings](#).

## 5.10 Windows

### 5.10.1 Windows

Help on the following windows is available:

[About window](#)

[Change group window](#)

[Dimensions window](#)

[Export window](#)

[Export data window](#)

[Export PDF window](#)

[Export vCard window](#)

[Fonts and colours window](#)

[Group properties window](#)

[Guest properties window](#)

[Import window](#)

[Import data window](#)

[Information window](#)

[Insert couple window](#)

[Insert family window](#)

[Insert group window](#)

[Insert guest window](#)

[Insert guests scratch-pad window](#)

[Insert shape window](#)

[Insert table window](#)

[Insert text window](#)

[Licence window](#)

[Main window](#)

[Most recently accessed window](#)

[Numbers and budget window](#)

[Preferences window](#)

[Print window](#)

[Print setup window](#)

[Save stationery layout window](#)

[Shape properties window](#)

[Stationery layout window](#)

[Table order window](#)

[Table properties window](#)

[Text properties window](#)


#### 5.10.2 About window

The **About** window tells you which version of PerfectTablePlan you are using. To display this window select **PerfectTablePlan>About PerfectTablePlan**.

Click on **Credits** to see the credits list.


Click on **Close** to close the window.

#### 5.10.3 Change group window




The  **Change group** window allows you to move one or more guests from one group to another. To display this window select one or more guests and then select **Edit>Change group....**

**Move guest(s)** displays the guests that will be moved.

Select the group you want to move the guests to in **To group** and click **OK**.

Note You can also change the group of a guest by dragging and dropping them from one group to another in the  [Groups pane](#).

#### 5.10.4 Chart title/footer window

The Chart title/footer window allows you to change the title or footer displayed in the  [Table chart](#) or  [Guest chart](#) pane. To display this window click the **Title** or **Footer** button at the top of the appropriate pane. Click on the  button to reveal the button.

Type the text of the title or footer in the **Text** edit.

Set the size of the text relative to the rest of the text in the pane using the **Relative size** drop down list. +4 is the largest text and -4 is the smallest text.






Click on the **Colour** button to change the colour of the title or footer.

Check **bold**, **italic** and **underline** to set whether the text attributes of the title or footer.

Click **OK** to accept the changes. Click **Cancel** to discard the changes. Any changes you make to dimensions only apply to the current plan.

#### 5.10.5 Dimensions window

The  **Dimensions** window allows you to change the dimensions of the floor plan. To display this window click the  button at the top of the  [Floor plan](#) pane.


**Units** allows you to choose metres or feet, as you prefer.

**Depth (Y)** is the depth of the floor plan in metres/feet (top to bottom on the screen).

**Breadth (X)** is the breadth of the floor plan in metres/feet (left to right on the screen).

**Area** is **Depth x Breadth**, in m<sup>2</sup> or ft<sup>2</sup> (depending on your choice of units).

**Area per guest** is the amount of area per guest, in m<sup>2</sup> or ft<sup>2</sup> (depending on your choice of units).


**Area per accepted guest** is the amount of area per guest who has  accepted, in m<sup>2</sup> or ft<sup>2</sup> (depending on your choice of units). As a rough guideline:


seating type	comfortable space per guest		minimum space per guest	
	ft <sup>2</sup>	m <sup>2</sup>	ft <sup>2</sup>	m <sup>2</sup>
all standing	7	0.7	5	0.5
all seated, rectangular tables	11	1	8	0.7

all seated, circular tables	14	1.3	11	1
--------------------------------	----	-----	----	---

Note Local fire regulations may specify limits on the number of guests for a venue.

**Seat width** is the number of metres/feet between the centre of one seat and the next (including elbow room). Automatic table size is calculated from seat width, so increasing/decreasing seat size may increase/decrease table sizes.



Check **Draw grid** if you would like a visible grid to be drawn in the  **Floor plan** pane. If checked you can set the drawn grid **Size** in the chosen units. The grid is not shown in print outs or export files.

Check **Snap to grid** if you would like the centres of items in the  **Floor plan** pane to be constrained to a grid. If checked you can set the snap grid **Size** in the chosen units. If you turn **Snap to grid** on or change the snap grid **Size**, you will be given the option to snap all tables, shapes and text to the new grid.



Note The drawn grid and the snap grid are independent of each other.

Click **OK** to accept the changes. Click **Cancel** to discard the changes. Any changes you make to dimensions only apply to the current plan.

#### 5.10.6 Export window

The  **Export** window allows you to choose a type of file to [export](#). To display this window select **File** >  **Export** or the equivalent **Main** tool bar button. You cannot export data if your plan is empty.

#### 5.10.7 Export data window

The **Export data** window allows you to export guest and seat assignment data from your plan to use in other applications, for example to import into spreadsheets to create customised reports. To display this window select **File** >  **Export**, select **guest and seating data to text/CSV file** in the  [Export window](#) and click **OK**. You cannot export data if your plan has no guests.

Set the **Export a record per** drop-down to **guest** or **group**, depending on whether

you want to export a record (line) for each guest or a record for each group of guests. For example:

- If you want to create a mail merge you will probably only want to send one letter to each group, so you should select **group**.
- If you want a complete list of guests to send to your stationery supplier, you should select **guest**.

Select a from the **Filter** drop-down menu depending on which guests you wish to export.

Check **Output header record** if you want to add a record with the field headings at the top of the export file.

Select the appropriate **Fields** check boxes, depending on what information you want to export to the file. Use the **Select all**, **Unselect all** and **Invert selection** buttons to save time changing your selection.

Use the **Format** drop-down list to choose whether the exported file is in [Excel CSV format or a custom delimited format](#) (e.g. fields separated by Tab characters). If you are using a custom format, set **Field separator** and **Record separator** to the field and record separators you want in the export file.

**Preview** shows you what the export file will look like. It shows the effect of changes made to **Export a record per**, **Output header record** etc. If there are more than 20 records to export, it only shows the first 20.


Set **Export file** to the location of the file you wish to create. You will be prompted if there is already a file at this location. Click on the Browse... button to browse to a location.

Click **Apply** to export the data. Click **OK** to export the data and close the window. Click **Cancel** to discard the changes.

See also:

[Export formats](#)

#### 5.10.8 Export PDF window

The  **Export PDF** window allows you to set the paper size and orientation of the PDF document you are about to create. To display this window export a file in PDF format.

Choose the page size from the **Page size** drop-down list.


Choose the page orientation from the **Orientation** drop-down list.

Click **OK** to create the PDF document and close the window. Click **Cancel** to cancel the export process.

See also:

[Export formats](#)

#### 5.10.9 Export vCard window

The **Export vCard** window allows you to export guest data from your plan in [vCard format](#) to use in other applications, for example to import into address books of other applications. To display this window select **File >  Export**, select **guest data to vCard file** in the [Export window](#) and click **OK**. You cannot export data if your plan has no guests.

Select from the **Export** drop-down list whether you wish to export all guests in the plan or just those currently selected in the front tab of the **Left** pane (all members of any group selected will be exported).

Select from the **to** drop-down list whether you wish to export all guests to a single vCard file or a separate vCard file for each guest.







Set **Location** to the folder you wish to create the export file(s) in. You will be prompted if there is already a file with the same name. Click on the **Browse...** button to browse to a location.

Click **OK** to export the data and close the window. Click **Cancel** to discard the changes.

See also:

## [Export formats](#)


### 5.10.10 Fonts and colours window


The  **Fonts and colours** window allows you to change fonts and colours/gradients in the  **Floor plan**,  **Table plan**,  **Table chart** and  **Guest chart** panes. To display this window click the  button at the top of the appropriate pane. The exact appearance of the window depends on the which pane is at the front. Use 'themes' to load and save groups of font and colour choices.

Click the coloured buttons to set the colours/gradients for the appropriate text, tables, seats and backgrounds.

Click **Font...** to set the appropriate font.

Click on the  button to load the selected theme from the **Themes** list.

Click on the  button to save the existing colours and fonts into the **Themes** list for future use.

Click on the  button to delete the selected theme from the **Themes** list.

Click **More fonts** to go to the PerfectTablePlan fonts web page.



Click **Default** to set all colours and fonts back to their original settings.

The effects of changes are shown in the **Preview**.

Click **OK** to accept the changes and close the window. Click **Apply** to apply the changes without closing the window. Click **Cancel** to discard the changes and close the window.

Once a theme has been created it will be available for other plans.

### 5.10.11 Group properties window

The  **Group properties** window allows you to show/edit group properties. To display this window select a single group in the **Group** pane and select **Edit>**  **Properties** or the equivalent **Main** tool bar button.

## Group


**Name** is the name of the group. PerfectTablePlan will attempt to guess a reasonable name from the names of the members when the group is created, but you can change this at any time.

**Notes** is for any general notes relevant to everyone in the group. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

## Contact








These fields store contact information for everyone in the group. This can be useful for creating address labels.

## Buttons


Click on the     buttons to display the properties of the first, previous, next or last group. The groups are ordered alphabetically.

Click **OK** to accept the changes and close the window. Click **Apply** to apply the changes without closing the window. Click **Cancel** to discard the changes.

### 5.10.12 Guest properties window

The  **Guest properties** window allows you to show/edit guest properties. To display this window select a single guest in the  **Guests**,  **Groups**,  **Floor plan**,  **Table plan** or  **Schematic** panes and select **Edit>  Properties** or the equivalent **Main** tool bar button or double-click on the guest.

## Guest

**Title** is the guest's title. You can type the title or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time you create a guest in this plan. Titles can also be configured in the  [Preferences window](#).


**First name** is the guest's first (given) name(s).

**Last name** is the guest's last (family) name(s).


Note The **Title**, **First name** and **Last name** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) unless you have disabled this


option in the  **Preferences** window.

**Display name** is a name that can include the guests' qualification, rank, post-nominal titles and/or role, e.g. Mr John Smith PhD, Master of Ceremonies. See [names and titles](#) for more details.

**Gender** is the gender of the guest. This can be useful information when doing the assignments. The [automatic assignment](#) will endeavour to alternate men and women where it can (unless you have disabled this in the  **Preferences** window). PerfectTablePlan will try to set the **Gender** from the **Title**, but you can change this at any time.

**Age** is the age of the guest, adult or child. Typically a child is anyone under the age of 16. This can be useful information when doing the seat assignments. PerfectTablePlan will try to set the age from the **Title** where it can, but you can change this at any time.

**Meal** is the meal choice for this guest. You can type the meal or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time. If you have a choice of more than one course you should enter the courses separated by commas, e.g. soup,fish,flan, the  [Statistics pane](#) will then total each course separately.



**Special req.** is any special requirements the guest has, for example: nut allergy, elderly or in a wheel chair. If there is more than one special requirement they should be separated by commas, the  **Statistics** pane will then total each special requirement separately.

**Notes** is for any general notes relevant to the guest. This can be used to store any information not stored elsewhere, for example whether the guest has paid. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Check **VIP** if the guest is an important guest, for example a guest of honour or a member of a wedding party. The [automatic assignment](#) will take special care assigning their seat, trying to assign them to a VIP table if there is one.



Check **Locked** to lock the guest to their current seat (or no seat). You will have to unlock them to reassign their seat. This is particularly useful for stopping the automatic assignment from moving them.

Select the **RSVP** status according to whether an invite has been sent, accepted,

declined or cancelled. Note that you may not be able to assign guests who have not  **Accepted**, depending on your settings in the  **Preferences** window.

**Assigned** shows which seat the guest has been assigned to (if any).


All fields are optional, except that a guest must have at least a First name or a Last name.

Note You can also edit many of these properties directly in the  [Guests pane](#) and  [Groups pane](#).

## Group

**Name** is the name of the group. PerfectTablePlan will attempt to guess a reasonable name from the names of the members when the group is created, but you can change this at any time.

**Notes** is for any general notes relevant to everyone in the group. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Note You can easily change the group of a guest by dragging them from one group to another in the  **Groups** pane.

## Contact

These fields store contact information for everyone in the group. This can be useful for creating stationery, such as address labels.

## Buttons

Click on the     buttons to display the properties of the first, previous, next or last guest. The guests are ordered alphabetically.



Click **OK** to accept the changes and close the window. Click **Apply** to apply the changes without closing the window. Click **Cancel** to discard the changes and close the window. You will be warned if you the guest has been edited to have the same **First Name**, **Last name** and **Title** as an existing guest (unless you have disabled this warning).

See also:



### [Add or remove dots at the end of titles](#)

#### 5.10.13 Import window





The  **Import** window allows you to choose a type of file to [import](#). To display this window select **File> Import** or the equivalent **Main** tool bar button.

See also:

### [Importing](#)

### [Import data](#) window

#### 5.10.14 Import data window

The  **Import data** window allows you to import data into your plan from other applications, for example [from an Excel CSV file](#). This can save you a lot of typing. To display this window select **File> Import...** or the equivalent **Main** tool bar button. The  [Import window](#) will be displayed. Select **text/CSV file** and click **OK**. An **Open** window will be displayed. Select the file you wish to import. The  **Import data** window will be displayed.

Note PerfectTablePlan cannot read Excel binary (.xls) files. If you have a .xls file you must open it in Excel and save it as a CSV (.csv) file. Renaming the file from .xls to .csv will not work. See [importing from Excel](#) for more details.

## Mapping imported columns to guest properties

Setting up common titles will often help PerfectTablePlan to make better sense of the data you are importing. Click on the **Titles** button to set your title preferences.

Select **File type** to import a pre-defined file type. Select **custom** to define your own.

**Map imported columns to guest properties** shows you how the file data will be imported, including the effects of various options described below.

If you have selected the **File type** as **custom** you need to tell PerfectTablePlan which columns in the import file correspond to which guest properties. Select from the drop-down lists at the top of each column to do this. For example the **column 1** might correspond to the guest title, **column 2** column to the guest last name and

the **column 4** column to the guest meal choice. Leave the drop-down list as **<ignore>** to ignore the contents of a column.

Map imported columns to guest properties

	column 1	column 2	column 3	column 4
property	title(s) ▼	last name(s) ▼	<ignore> ▼	meal
row 1	Mr	Smith		beef
row 2	Miss	Brown		fish
row 3	Mr	brown		fish
row 4	Mrs	Brown		beef

If you have multiple guests in one row or the title, first name or last name are not in separate columns PerfectTablePlan will attempt to unravel them. For example it can handle all the following:

Map imported columns to guest properties

	column 1	column 2	column 3	column 4
property	full name(s) ▼	title(s) ▼	first name(s) ▼	last name(s) ▼
row 1		Mr and Mrs		Kennedy
row 2		Mr + Mrs	John + Jane	Goldman
row 3		Mr & Miss	Kevin & Hannah	Bates, Muller
row 4	Mr & Mrs Arthur Smith			
row 5	K Brown, H Jones			
row 6	Mr Digby A Dashing-Smythe and Miss Kate Marlowe-Henley			
row 7	Andrew, Beryl & Cloe Cooper			

If title is imported, but not gender or age, the import will attempt to guess the gender or age from the title using the titles set in the [Preferences window](#).

Note You can edit information in the table. This will change the information imported, but not affect the contents of the file you are importing. Make sure you press Enter to confirm any edits before clicking on **Apply** or **OK**.

Text is imported directly except for **Gender**, **Age**, **VIP** and **RSVP**, which are based on the values below:

Column	Values
--------	--------

<b>Gender</b>	Text must start with: <ul style="list-style-type: none"><li>• 'F' or 'f' for a female</li><li>• 'M' or 'm' for male</li></ul> otherwise the guest is imported with unknown gender
<b>Age</b>	Text must start with: <ul style="list-style-type: none"><li>• 'C' or 'c' for a child</li></ul> otherwise the guest is imported as an adult
<b>VIP</b>	Text must start with: <ul style="list-style-type: none"><li>• 'Y' or 'y' for a VIP</li></ul> otherwise the guest is imported as an non-VIP
<b>RSVP</b>	Text must start with: <ul style="list-style-type: none"><li>• 'S' or 's' for sent</li><li>• 'A', 'a', 'Y' or 'y' for accepted</li><li>• 'C' or 'c' for cancelled</li><li>• 'D', 'd', 'N' or 'n' for declined</li></ul> otherwise the RSVP status is unset.

You can easily edit any of these properties at a later point.

## Importing groups

If you wish to import guests as couples, families and/or group you need to:

1. have a groups column in your input data
2. use the same name in the group column for each person in the couple, family or group
3. make this column the **group** field during import

Map imported columns to guest properties


	column 1	column 2	column 3
property	first name(s) ▼	last name(s) ▼	group ▼
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

If no group is set then consecutive guests with the same surname will be added to the same group. You can choose the proximity to use for members of the same group from the **Proximity for guests in the same group** drop-down list.


Map imported columns to guest properties

	column 1	column 2
property	full name(s) ▼	num. guests ▼
row 1	Mr J Smith	2

The **Num. guests** field is the number of additional guests to be added for a given guest in the same group. It can be from 0 to 999. For example if the guest is "John Smith" and **Num. guests** field is 2 the guests "John Smith", "guest 1 of John Smith" and "guest 2 of John Smith" will be added (all in the same group).

You can easily change the grouping of guests later by dragging them to another group in the  **Groups** pane.

## Further options

Click on the  button to show more options.

**Location** shows the location of the import file. Click on the **Browse...** button to change the file you wish to import.

Use **Ignore first** if you wish to ignore one or more rows in the file. Often you won't want to import the first row as it is a header record.

Use the **Format** drop-down list to choose whether the imported file is in Excel CSV format or a **custom** format (e.g. columns separated by Tab characters). If you are using a custom format, set **Column separator** and **Row separator** to the field and record separators in the import file.

Note If your spreadsheet contains non-ASCII characters (e.g. Chinese or other Unicode characters) these may be lost when you save your Excel .xls file to a .csv file. To avoid this problem save as **Unicode text (\*.txt)** and import using **custom** format with a **TAB** column separator and **CARRIAGE RETURN** row separator.

Click on **Add row** to add an additional row to be input. This is useful if you want to type in the data for additional guests. If a row is selected the new row will be added below, otherwise it will be added to the end.

Click on **Delete row** to delete the currently selected row.

Click on **Add column** to add an additional column to be input. This is useful if you want to type in some additional data for each guest, e.g. their gender or group. If a column is selected the new row will be added to the right, otherwise it will be added to the end.

Click on **Delete column** to delete the currently selected column.

## Buttons

Click **Apply** to import the data. Click **OK** to import the data and close the window. Click **Cancel** to discard the changes.

See also:

[Importing](#)

[Insert guests scratch-pad window](#)

[Importing guests from vCards](#)



[Importing guests from text and Excel CSV files](#)

[Import guest details from an Excel spreadsheet](#)

[Import guest details from Outlook](#)

[Import guest details from Outlook Express](#)

#### 5.10.15 Information window

The  **Information** window allows you to show/edit general properties of the plan. To display this window select **File> Information** or the equivalent **Main** tool bar button.

**Event** allows you to enter a brief description of the event.


**Venue** allows you to enter a brief description of the event location.

**Date** allows you to enter the date of the event. The date format conforms to your system locale. For example if you have set your locale to the USA you should see MM/DD/YYYY format dates and if you have set your local to the UK you should see DD/MM/YYYY format dates. You can change your locale through the operating system. You need to restart PerfectTablePlan after changing the locale to see the effect.



**Days remaining** shows the number of days remaining until the event.


**Notes** is for general notes on the vent.

Click **OK** to accept the changes and close the window. Click **Cancel** to discard the changes.

Note Budget related information has been moved to the  [Numbers and budget window](#) in version 3 of PerfectTablePlan.

#### 5.10.16 Insert couple window

The  **Insert couple** window allows you to enter details for a couple. To display this window select **Insert> Guest couple** or the equivalent **Insert** tool bar button.

Note Guests added as a couple will share the same contact details. If this isn't appropriate add them as individual guests with **Insert> Single guest** instead.

## Guests

**Title** is the guest's title. You can type the title or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time you create a guest in this plan. You can also add standard titles in the [Preferences window](#).

**First name** is the guest's first (given) name. You can also add middle names here.

**Last name** is the guest's last (family) name. For convenience, the last name of the second guest is set to the same as the last name of the first guest, but you can change this at any time.

Note The **Title**, **First name** and **Last name** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) unless you have disabled this option in the [Preferences window](#).


**Display name** is a name that can be used in various views. This could include the guests' qualification, rank, post-nominal titles and/or role, e.g. Mr John Smith Phd, Master of Ceremonies. PerfectTablePlan will try to construct a sensible display name from the **Title**, **First name** and **Last name**, but you can change this at any time.

**Gender** is the gender of the guest. This can be useful information when assigning seats. The [automatic assignment](#) will endeavour to alternate men and women where it can (unless you have disabled this in the [Preferences window](#)). PerfectTablePlan will try to set the gender from the **Title** where it can, but you can change this at any time.

**Age** is the age of the guest, adult or child. Typically a child is anyone under the age of 16. This can be useful information when assigning seats. PerfectTablePlan will try to set the age from the **Title** where it can, but you can change this at any time.

**Meal** is the meal choice for a guest. You can type the meal choice or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time. If you have a choice of more than one course you should enter the courses separated by commas, e.g. soup,fish,flan, the [Statistics pane](#) will then show a total for each course separately.

**Special req.** is any special requirements the guest has, for example: nut allergy,

elderly or in a wheel chair. Once you have typed it in once, it will be available to select next time. If there is more than one special requirement they should be separated by commas, the  **Statistics** pane will then total each separately.



**Notes** is for any general notes relevant to the guest. This can be used to store information any other relevant information. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Check **VIP** if the guest is an important guest, for example a guest of honour or a member of a wedding party. The automatic assignment will take special care assigning their seat, trying to assign them to a VIP table if there is one.

Select the **RSVP** status according to whether an invite has been sent, accepted, declined or cancelled.

Note You need to scroll down using the scroll bar to fill out all the details for the other guest in the couple.

All fields are optional, except that each guest must have either a **First name** or a **Last name**.


A couple will automatically be given proximity  **Next to**. You can change this at any time in the  [Proximity pane](#).

## Group

Select **create new** if you wish these guests to be the only member of a new group. Select **add to existing** and select a group if you wish these guests to be added to an existing group.

**Name** is the name of the group. PerfectTablePlan will try to construct a display name from the names of the couple, but you can change this at any time.

**Notes** is for any general notes relevant to the group. This is shared by all member of the group. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Note You can easily change the group membership of a guest later by dragging them from one group to another in the  [Groups pane](#).



## Contact



This tab contains contact details for all members of the group. This information is optional.


Contact data is shared by all members of the group.

## Buttons

Click **Add** to accept the changes and close the window. You will be warned if you are adding a guest with the same **First Name**, **Last name** and **Title** as an existing guest (unless you have disabled this warning). Click **Cancel** to discard the changes.


### 5.10.17 Insert family window

The  **Insert family** window allows you to enter details for a family with two or more members. To display this window select **Insert>**  **Guest family** or the equivalent **Insert** tool bar button.

Note Guests added as a family will share the same group notes and contact details. If this isn't appropriate add them as individual guests with **Insert>**  **Single guest** instead.


## Guests

**Members** is the number of members in the family. You can set this to 0 to create an empty group.

**Title** is the guest's title. You can type the title or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time you create a guest in this plan. Titles can also be configured in the  [Preferences window](#).


**First name** is the guest's first (given) name(s).

**Last name** is the guest's last (family) name(s).

Note The **Title**, **First name** and **Last name** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) unless you have disabled this option in the  **Preferences window**.

**Display name** is a name that can include the guests' qualification, rank, post-nominal titles and/or role, e.g. Mr John Smith Phd, Master of Ceremonies.

See [names and titles](#) for more details.

**Gender** is the gender of the guest. This can be useful information when assigning seats. The [automatic assignment](#) will endeavour to alternate men and women where it can (unless you have disabled this in the  Preferences window). PerfectTablePlan will try to guess the gender from the Title where it can, but you can change this at any time.

**Age** is the age of the guest, adult or child. Typically a child is anyone under the age of 16. This can be useful information when assigning seats. PerfectTablePlan will try to set the age from the **Title** where it can, but you can change this at any time.

**Meal** is the meal choice for a guest. You can type the meal choice or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time. If you have a choice of more than one course you should enter the courses separated by commas, e.g. soup, fish, flan, the  $\Sigma$  [Statistics pane](#) will then show a total for each course separately.

**Special req.** is any special requirements the guest has, for example: nut allergy, elderly or in a wheel chair. Once you have typed it in once, it will be available to select next time. If there is more than one special requirement they should be separated by commas, the  $\Sigma$  **Statistics** pane will then total each separately.

**Notes** is for any general notes relevant to the guest. This can be used to store information any other relevant information. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Check **VIP** if the guest is an important guest, for example a guest of honour or a member of a wedding party. The automatic assignment will take special care assigning their seat, trying to assign them to a VIP table if there is one.

Select the **RSVP** status according to whether an invite has been sent, accepted, declined or cancelled.

Note You need to scroll down using the scroll bar to fill out all the details for the other guests in the family.

All fields are optional, except that each guest must have either a **First name** or a **Last name**.

If the first two guests in a family are adults of opposite gender they will automatically be given proximity ❤️ **Next to** each other. The rest of the members of the family will be given proximity 🤝 **Near to** each other. You can change this at any time in the ❤️ [Proximity pane](#).

## Group

Select **create new** if you wish these guests to be the only member of a new group. Select **add to existing** and select a group if you wish these guests to be added to an existing group.

**Name** is the name of the family group. PerfectTablePlan will try to construct a display name from the names of the family, but you can change this at any time.

**Notes** is for any general notes relevant to the family group. This is shared by all member of the family group. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Note You can easily change the group membership of a guest later by dragging them from one group to another in the 👥 [Groups pane](#).

## Contact

This tab contains contact details for all members of the family group. This information is optional.

Contact data is shared by all members of the group.



## Buttons


Click **Insert guest** to add another guest. Click **Delete guest** to delete the last guest.

Click **Add** to accept the changes and close the window. You will be warned if you are adding a guest with the same **First Name**, **Last name** and **Title** as an existing guest (unless you have disabled this warning). Click **Cancel** to discard the changes

and close the window.


#### 5.10.18 Insert group window

The  **Insert group** window allows you to enter details for a group with two or more members. This is useful for quickly adding a group of friends or work colleagues. To display this window select **Insert>**  **Guest group** or the equivalent **Insert** tool bar button.

Note Guests added as a group will share the same group notes and contact details. If this isn't appropriate add them as individual guests with **Insert>**  **Single guest** instead.


## Guests

**Members** is the number of members in the group. You can set this to 0 to create an empty group.

**Title** is the guest's title. You can type the title or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time you create a guest in this plan. Titles can also be configured in the  [Preferences window](#).


**First name** is the guest's first (given) name(s).

**Last name** is the guest's last (family) name(s).

Note The **Title**, **First name** and **Last name** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) unless you have disabled this option in the  **Preferences** window.

**Display name** is a name that can include the guests' qualification, rank, post-nominal titles and/or role, e.g. Mr John Smith Phd, Master of Ceremonies.

See [names and titles](#) for more details.

**Gender** is the gender of the guest. This can be useful information when assigning seats. The [automatic assignment](#) will endeavour to alternate men and women where it can (unless you have disabled this in the  **Preferences** window). PerfectTablePlan will try to guess the gender from the **Title** where it can, but you

can change this at any time.

**Age** is the age of the guest, adult or child. Typically a child is anyone under the age of 16. This can be useful information when assigning seats. PerfectTablePlan will try to set the age from the **Title** where it can, but you can change this at any time.

**Meal** is the meal choice for a guest. You can type the meal choice or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time. If you have a choice of more than one course you should enter the courses separated by commas, e.g. soup,fish,flan, the [ΣStatistics pane](#) will then show a total for each course separately.

**Special req.** is any special requirements the guest has, for example: nut allergy, elderly or in a wheel chair. Once you have typed it in once, it will be available to select next time. If there is more than one special requirement they should be separated by commas, the [ΣStatistics](#) pane will then total each separately.

**Notes** is for any general notes relevant to the guest. This can be used to store information any other relevant information. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Check **VIP** if the guest is an important guest, for example a guest of honour or a member of a wedding party. The automatic assignment will take special care assigning their seat, trying to assign them to a VIP table if there is one.

Check **Accepted invite** if the guest has responded to say that they will definitely be attending. Leave it unchecked if you aren't sure.

Note You need to scroll down using the scroll bar to fill out all the details for the other guests in the group.

All fields are optional, except that each guest must have either a **First name** or a **Last name**.

All the members of the group will be given proximity 🤝 **Near to** each other. You can change this at any time in the [❤️Proximity pane](#).


## Group

Select **create new** if you wish these guests to be the only member of a new group.

Select **add to existing** and select a group if you wish these guests to be added to an existing group.

**Name** is the name of the group. PerfectTablePlan will try to construct a display name from the members of the group, but you can change this at any time.

**Notes** is for any general notes relevant to the group. This is shared by all members of the group. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Note You can easily change the group membership of a guest later by dragging them from one group to another in the  [Groups pane](#).

## Contact

This tab contains contact details for all members of the group. This information is optional.



Contact data is shared by all members of the group.

## Buttons

Click **Insert guest** to add another guest. Click **Delete guest** to delete the last guest.

Click **Add** to accept the changes and close the window. You will be warned if you are adding a guest with the same **First Name**, **Last name** and **Title** as an existing guest. Click **Cancel** to discard the changes and close the window.

### 5.10.19 Insert guest window

The  **Insert guest** window allows you to enter details for a single guest. To display this window select **Insert>**  **Single guest** or the equivalent **Insert** tool bar button.

Note A single guest is created as the only member of their own group. To add a guest to an existing group select **add to existing** in the **Group** tab.

## Guest

**Title** is the guest's title. You can type the title or select it from existing choices in

the drop-down list. Once you have typed it in once, it will be available to select next time you create a guest in this plan. Titles can also be configured in the [Preferences window](#).

**First name** is the guest's first (given) name(s).

**Last name** is the guest's last (family) name(s).

Note The **Title**, **First name** and **Last name** will be automatically capitalised (e.g. `mr john smith` converted to `Mr John Smith`) unless you have disabled this option in the [Preferences window](#).

**Display name** is a name that can include the guests' qualification, rank, post-nominal titles and/or role, e.g. `Mr John Smith Phd, Master of Ceremonies`.

See [names and titles](#) for more details.

**Gender** is the gender of the guest. This can be useful information when assigning seats. The [automatic assignment](#) will endeavour to alternate men and women where it can (unless you have disabled this in the [Preferences window](#)). PerfectTablePlan will try to guess the gender from the **Title** where it can, but you can change this at any time.

**Age** is the age of the guest, adult or child. Typically a child is anyone under the age of 16. This can be useful information when assigning seats. PerfectTablePlan will try to set the age from the **Title** where it can, but you can change this at any time.

**Meal** is the meal choice for a guest. You can type the meal choice or select it from existing choices in the drop-down list. Once you have typed it in once, it will be available to select next time. If you have a choice of more than one course you should enter the courses separated by commas, e.g. `soup, fish, flan`, the [Statistics pane](#) will then show a total for each course separately.

**Special req.** is any special requirements the guest has, for example: nut allergy, elderly or in a wheel chair. Once you have typed it in once, it will be available to select next time. If there is more than one special requirement they should be separated by commas, the [Statistics pane](#) will then total each separately.

**Notes** is for any general notes relevant to the guest. This can be used to store

information any other relevant information. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Check **VIP** if the guest is an important guest, for example a guest of honour or a member of a wedding party. The automatic assignment will take special care assigning their seat, trying to assign them to a VIP table if there is one.

Select the **RSVP** status according to whether an invite has been sent, accepted, declined or cancelled.


All fields are optional, except that a guest must have either a **First name** or a **Last name**.

## Group

Select **create new** if you wish this guest to be the only member of a new group. Select **add to existing** and select a group if you wish this guest to be added to an existing group.

**Name** is the name of the group. The software will try to construct a display name from the name of the guest, but you can change this at any time.

**Notes** is for any general notes relevant to the group. This is shared by all member of the group. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Note You can easily change the group membership of a guest later by dragging them from one group to another in the  [Groups pane](#).

## Contact



This tab contains contact details for the guest. This information is optional.

## Buttons

Click **Add** to accept the changes and close the window. You will be warned if you are adding a guest with the same **First Name**, **Last name** and **Title** as an existing guest (unless you have disabled this warning). Click **Cancel** to discard the changes.



#### 5.10.20 Insert guests scratch-pad

The  **Insert guests scratch-pad** window allows to quickly enter guest names in free text. To display this window select **Insert>**  **Guests scratch-pad** or the equivalent **Insert** tool bar button.

Click on the **Titles...** button to set-up standard [titles](#) in the [Preferences window](#). This will help PerfectTablePlan make better guesses about how to split the text correctly into titles, first names and last names and to guess gender.





Enter the names, one guest/couple/family/group per line and click **Next**. Some examples of allowed formats are shown in the window.

Click **Back** to go back and make corrections to the text.

Click **OK** to add the guests to your plan.

Click **Cancel** to discard your changes.

#### 5.10.21 Insert shape window

The  **Insert shape** window allows you to add shapes to the  [Floor plan pane](#). These shapes can be useful for representing dance floors, stages, walls and other floor plan features. To display this window click the  **Insert shape** button at the top of the  **Floor plan** pane.

**Name** is the name of the shape (optional).

Click the **Font...** button to set the font for the name.

Click the **Name colour** button to set the colour for the shape name text.

Set the **Shape** drop down list to the desired shape.

Set **Angle** to the rotation angle of the shape.

Use the **Inside** colour button to set the colour for the inside of the shape.


Use the **Outside** colour button to set a colour for the outside of the shape.

Set the **Size** field(s) to the dimensions of the shape.

Set the **Units** drop-down list to your preferred units.






**Notes** can be used to store any relevant notes for the shape. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Click **Add** to accept the changes and close the window. Click **Cancel** to discard the changes.

Note The new shape will be placed automatically in the  [Floor plan pane](#). It will attempt to place it in a space near the centre of the room. You can then drag it to the appropriate position.



You can change any of the shape properties (including the name and shape type) at a later point using the [Shape properties window](#).

#### 5.10.22 Insert table window


The **Insert table** window allows you to create one or more tables. To display this window select **Insert>**  **Circular table**, **Insert>**  **Rectangular table**, **Insert>**  **Banquet table**, **Insert>**  **Head table**, **Insert>**  **Custom table** or the equivalent **Insert** tool bar button.

**Name** is the name of the table. The software will choose a unique name for you, but the names don't have to be unique and can be blank. To display the table name as 2 lines, with the second line in italics use a **\*\*** separator, for example:








Set **Angle** to the desired angle of the table in the  **Floor plan** and  **Table plan** panes.


Click the **Colour** button to choose the colour of the table in the  **Floor plan** and

 **Table plan panes.** This overrides any table colour set for the pane.


**Shape** is the shape of the table. The available shapes of table are:

Table	Icon	Meaning
Circular		a circular tables with seats all around it
Rectangular		a rectangular or square table with the same number of seats on opposite sides
Banquet		a long table with seats on two sides
Head (top)		a long table with seats on only one side, for example a head table at a wedding
Custom		a rectangular or square table with a potentially different numbers of seats on each of the 4 sides

**Seats** is the number of seats. For a circular or head table you specify the total number of seats. For a banquet table you specify the number of seats across. For a rectangular table you specify the number of seats across and the number of seats down. For a custom table you specify the number of seats on each of the 4 sides.

Note For a square table create a rectangular table and set the number of seats **across** and **down** the same. You can specify a table with no seats for a cake, gift or serving table - it will not be shown in the  [Table chart pane](#).

**Size** is the size of the table. Check the **auto** check box to automatically size the


table according to the number of seats and the seat size (as set in the  [Dimensions window](#)). Uncheck the **auto** check box to set your own table size.

**VIP** is used to designate tables for VIPs to sit at. The automatic assignment will attempt to seat VIPs on VIP tables.

**Notes** can be used to store any relevant notes for the table, e.g. details of table decorations. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.



**Create** can be used to create more than one table at a time. The text alongside tells you how many seats will be available after the new tables have been created.

Click **Add** to accept the changes and close the window. Click **Cancel** to discard the changes.

Note The new table(s) will be placed automatically in the  [Floor plan pane](#). It will attempt to place them in spaces near the centre of the room. You can then drag them to the appropriate position.

You can change any of the table properties (including the name and shape) at a later point using the [Table properties window](#).

#### 5.10.23 Insert text window

The **T** **Insert text** window allows you to add text to the  [Floor plan pane](#). This text can be used for titles, headers, footer and captions. To display this window click the **T** **Insert text** button at the top of the  **Floor plan pane**.


**Text** is the content of the text.

Set **Angle** to the rotation angle of the text.

Click the **Font...** button to set the font for the text.

Use the **Colour** button to set a colour for the text.



Click **Add** to accept the changes and close the window. Click **Cancel** to discard the changes.

Note The new text will be placed automatically in the  [Floor plan pane](#). It will


attempt to place it in a space near the centre of the room. You can then drag it to the appropriate position.

You can change any of the text properties at a later point using the **T** [Text properties window](#).

#### 5.10.24 Licence window

The  **Licence** window allows you to enter your [licence](#) key. To display this window select  **Licensing>Licence**.

Your licence status is displayed. If the software is unlicensed you will only be able to save, export or print plans with 30 or less guests.

If you have a licence key type or paste +V it into the **Key** field. The key will only be comprised of the number characters 0-9 and the alphabetic characters a-f. Dash (-) and space characters are optional and are ignored.

Click **Purchase licence key** to purchase a licence key on-line (an Internet connection is required).

Click **Upgrade V2 to V3** if you have a version 2 key and wish to upgrade to version 3.

Click **Subscribe to newsletter** to go to a web page where you can subscribe to our occasional newsletter. The newsletter includes details of new releases of PerfectTablePlan.

Click **troubleshoot licence problems** to go to our Frequently Asked Questions web page.

Click **resend licence key** to go to our key retrieval page.

Click **more details on licensing** to go to our licensing web page.



Click **OK** to enter the licence key. If you have entered a new key you will be notified of whether the key is valid or not.

Click **Cancel** to discard the changes.

See also:

## [Licensing](#)

### 5.10.25 Most recently accessed window


The  **Most recently accessed** window is a convenient way to open plans that you have been recently opened or saved, rather than having to search your computer for them. To display this window select **File>Open recent...** or click on the equivalent **Main** tool bar button.

Plan files are shown in the order they were last opened/saved (most recent at the top).

To display this window every time PerfectTablePlan select **Show this window** from the **At start-up** drop-down list. It will only be displayed at start-up if there is at least one file in the list and a file has not already been loaded (e.g. by double clicking on a plan file to start PerfectTablePlan).

To open a plan file select it in the list and click the **OK** button or double click on the plan file. To close the window without opening a plan click the **Cancel** button.


### 5.10.26 Numbers and budget window

The  **Numbers and budget** window allows you to estimate approximate number of guests attending and costs. To display this window select **File>Numbers and budget** or the equivalent **Main** tool bar button.

**Fixed** allows you to enter the fixed cost of the event, regardless of the number of guests, e.g. venue and band hire cost.


**Per child** allows you to enter the cost of the event per child, e.g. the food and drink cost per child.

**Per adult** allows you to enter the cost of the event per adult, e.g. the food and drink per adult.

Set the **Chance of attending** to values that you feel reflect the probability of guests attending, depending on their RSVP status. For example, set  **Accepted** to 95% if you think guests who have accepted their invitation are 95% likely to attend.

The **Guests** column shows the number of guests for each RSVP status.

The **Sub total** column shows the estimated number of guests attending for each RSVP status.

**Estimated guests** is an estimate of the number of guests attending (rounded to the nearest whole number). For example, if you have 10 guests 0% likely to attend, 10 guests 10% likely to attend, 10 guests 95% likely to attend and  5 guests 100% likely to attend the estimated number of guests is 16 (  $10 \times 0\% + 10 \times 10\% + 10 \times 95\% + 5 \times 100\%$ ). Due to rounding the total number of guests may not be the same as estimated adults + estimated children.


**Estimated cost** is derived from the cost data provides and the estimated number of guests.

Obviously the results are only as good as the data you provide.

Note You can easily change guest RSVP status in the  [Guests pane](#).



Click **OK** to accept the changes and close the window. Click **Cancel** to discard the changes.

#### 5.10.27 Preferences window

The  **Preferences** window allows you to change the behaviour of the software according to your preferences. Changes apply to all plans edited by the current user henceforth, not just the current plan. To display this window select **PerfectTablePlan>Preferences**.

### General

Check **automatically capitalise names** to automatically capitalise guests titles, first names and last names as they are typed (e.g. convert mr john smith automatically to Mr John Smith).

Check **show tool tips** to display helpful tool tips when you hover the mouse over controls and over tables and seats in the  [Floor plan pane](#) and  [Table plan pane](#).

Check **large toolbar icons** to display tool bar icons as 32x32 pixels, otherwise they will be displayed 24x24 pixels.

Check **toolbar text** to show text under each tool bar icon.

Check **export/copy image as large as possible** to make 🏠 **Floor plan** or 🗺 **Table plan** images created by exporting or copying to the clipboard as large as possible (each seat up to 500 pixels across, depending on the amount of memory available). If this box is unchecked images will be exported/copied as standard size (each seat up to 100 pixels across, depending on the amount of memory available).

The **At start-up** drop-down list allows you to choose how to open plan files at start-up. If you wish to open the most recently accessed plan each time you start PerfectTablePlan, select **Open last plan**. If you wish to show the [Most recently accessed window](#) each time you start PerfectTablePlan, select **Open 'Most recent' window**. If you wish to start with a new empty plan, select **Don't open anything**.

Select **User interface style** according to whether you want to use the newer 'unified' style, with a merged toolbar and titlebar for the **Main** window. The 'unified' style is only available for MacOSX 10.4 and later.



Standard style



Unified style

Set **New table name format** according to how you would like new tables to be named. See below for examples. You can rename the tables at any point using the **Table properties** window.

Example table name format	Example table names
Table {next_table_num}	"Table 1", "Table 2", "Table 3"
{next_table_num}	"1", "2" , "3"



table	“table” , “table”
-------	-------------------

Set **export/copy image margin** to the % margin you want around 🏠 **Floor plan** or 📄 **Table plan** images created by exporting or copying to the clipboard.

Select **Floor/Table Plan pane mouse wheel behaviour** according to whether you want the mouse wheel to zoom in, zoom out or scroll down when you move the mouse wheel backwards in the 🏠 **Floor plan** pane and 📄 **Table plan** pane . Hold down the ⌘ key while moving the mouse wheel to get the opposite (zoom->scroll, scroll->zoom) behaviour.

Select **Guest/group search** according to whether you want to hide non-matching guests/group or select the first matching guest/group. See 👤 [Guests pane](#) and 👥 [Groups pane](#) for more details.

Select **Allow seat assignment with RSVP** according to which RSVP statuses you wish to allow guests to be assigned with. Changing this the selection can cause guests to be unassigned from their seats if their RSVP status is incompatible with the new setting.

## Auto assignment

Select **according to guest proximity** if you want to the auto seating to assign guests according to the proximities set in the ❤️ [Proximity pane](#). Select **randomly** to assign guests to seats completely randomly (this may be useful for some types of events).

Select **seconds** if you wish the [automatic assignment](#) to stop after the specified number of seconds. We recommend at least 30 seconds. If you have a lot of guests or a very slow PC you may have to increase this time considerably.

Select **attempts without improvement** if you wish the automatic assignment to stop after a specified number of [attempts](#) without improvement. We recommend you allow at least 10 attempts. If you set this number very high and have a lot of guests or a very slow PC the automatic assignment may run for a long time.

Select **whichever happens first** to stop when either of the above criteria is met, e.g. the automatic assignment has run for x seconds or y attempts without an improvement.


Note You can stop the automatic assignment at any time by pressing the **Stop** button or the *Esc* key. This will keep the best assignment so far.

See [automatic assignment](#) for a discussion of automatic assignment times.


Check **Alternate males and females** if you want the automatic assignment to try to alternate males and females around each table (e.g. M-F-M-F-M-F...).

## Titles

Titles that you add here will be available in the guest **Title** field for all plans. Add titles appropriate to your usage, for example military ranks, Masonic ranks or non-English titles.

Note This is intended for titles that come before the name, e.g. Dr, Herr, Colonel etc. It is not intended for titles that come after the name (post-nominal). These are best handled by adding them individually to the **Display name** field in the  [Guest properties](#) window.

You can also specify a default gender, age and VIP status. This is used when inserting new guests. It is also used when importing to set guest gender, age and VIP status (if not supplied) from their title.

Click  **Add** to add a new title.

Click  **Delete** to delete the selected title(s).

Click  **Up** to move the selected title(s) up one row.

Click  **Down** to move the selected title(s) down one row.

Click  **Sort** to sort the titles alphabetically.

Click **Import from plan** to import titles from the current plan into the preferences.

Set **Default couple** to the titles you wish to use as the default when adding a couple or family.

## Back-ups

Check **when saved** to create a [back-up file](#) each time you save a plan.

Check **on auto-assignment** to create a back-up file each time you run an auto-assignment.

Check **automatically every** to create a back-up file at the specified time interval. The plan will only be backed-up if it has been changed during this time.

## Warnings

Check **warn on delete guest or group** to confirm each guest or group deletion.

Check **warn on delete table** to confirm each table deletion.

Check **warn if auto assignment will re-assign guests** to confirm each time the [automatic assignment](#) will re-assign unlocked guests to new seats.









Check **warn if guests have duplicate names** to confirm adding a guest with the same title, first name and last name as an existing guest.

Check **warn if printing stationery to wrong page & size/orientation** to warn when printing stationery if the stationery page size or orientation does not match the printer settings.

## Buttons

Click **OK** to accept the changes. Click **Cancel** to discard the changes. Changes to this window affect all plans.

### 5.10.28 Print window

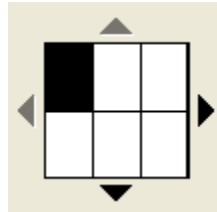
The  **Print** window is displayed when you print the front pane in the [Top pane](#). To display this window select **File> Print** or the equivalent **Main** tool bar button. You can only print the  **Floor plan**,  **Table plan**,  **Table chart**,  **Guest chart**,  **Stationery** and  **Statistics** panes. The exact controls visible in the window will depend on the type of pane being printed.

Change the **Size** spin box to change the size of the print out.

Click **Fit to page** to set the print size to fit on a single page.

Check **Centre** to centre the print on the page(s).

If you are printing across more than one page the **Page** control will be displayed. Click on a page or one of the arrows to change the previewed page.





The page navigation control

Click on the  button to show additional controls.

Change **Horizontal fine adjust** and **Vertical fine adjust** to make small adjustments to the position of the printout on the page. This can be useful to ensure that multi-page prints are correctly paginated (e.g. a line of text does not get split by a page boundary).

Select  **landscape** or  **portrait** to change the orientation of the print out.


**Setup** shows the current printer settings. Click the **Setup** button to select a different printer, page size or set-up using the [Print setup window](#).

You can add titles and footers to the printout in the  [Table chart](#) and  [Guest chart](#) panes. We would really appreciate a mention of [www.perfecttableplan.com](http://www.perfecttableplan.com) in the footer!

See also:

[Export to PDF format](#)

#### 5.10.29 Print setup window

The **Print setup** window allows you to change printer settings. To display the **Print setup** window click the **Setup...** button in the  [Print window](#).

Select a printer from the **Printer** drop-down menu.

Select a preset printer settings from the **Presets** drop-down menu.

Use **Copies** to set the number of copies you want to print.



Select **Preview** to change other printer settings, such as the page orientation.

Click on the **Print** button to return to confirm the change to printer settings and **Cancel** to abandon the changes (this button should be named **OK**, but it is a system window and we are unable to change it).

See also:

[Export to PDF format](#)

#### 5.10.30 Save stationery layout window

The  **Save stationery layout** window allows you to save the layout of stationery so you can use it again. It appears when you change the stationery layout in the  [Stationery Layout window](#).

**Name** is the name of the new stationery, e.g. "My address labels".



**Manufacturer** is the manufacturer of the stationery, e.g. "Office Depot". You can type or select from the list.

**Type** is the type of stationery, e.g. "Tent card". You can type or select from the list.

You need to supply a **Name**, **Manufacturer** and **Type** before you can save the layout.

Click **OK** to save the stationery layout and close the window. You will be prompted before overwriting an existing layout. Click **Cancel** to discard any changes and close the window.

#### 5.10.31 Shape properties window

The  **Shape properties** window allows you to show/edit shape properties. To display this window select a single shape in the  [Floor plan pane](#) and select **Edit> Properties** or the equivalent **Main** tool bar button.

**Name** is the name of the shape (optional). You can change it to anything you like.

Click the **Name colour** button to set the colour for the shape name text.

Change the **Shape** drop-down list to change the shape.

Set **Angle** to the rotation angle of the shape.

Use the **Inside** colour button to set the colour for the inside of the shape.

Use the **Outside** colour button to set a colour for the outside of the shape.




Set the **Size** field(s) to the dimensions of the shape.

Set the **Units** drop-down list to your preferred units.

**Notes** can be used to store any relevant notes for the shape. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Click **OK** to accept the changes and close the window. Click **Apply** to apply the changes without closing the window. Click **Cancel** to discard the changes.

#### 5.10.32 Stationery layout window

The  **Stationery layout** window allows you to change the size of a page and the items on the page. To display this window click the  **Stationery layout** button in the  [Stationery pane](#).

The **Preview** tab shows the shape of the page and the size and position of the stationery items.

The **Nomenclature** tab shows the meaning of the dimension fields in this window.

Change **Units** to change between mm and inches.


Click on a **Pre-defined** stationery type to set the layout accordingly. Use the **Manufacturers**, **Types** and **Paper sizes** filters to control which pre-defined stationery are listed.

Type a text into the **Search** field to find a particular stationery type, e.g. type J8161 to find Avery J8161 address labels.

Change the **Orientation** between **Portrait** and **Landscape**, depending on how you

wish to print the stationery.





Click **Centre items** to centre the items in the page (i.e. **Left margin = Right margin** and **Top margin = Bottom margin**).

If you create your own layout you will be prompted to save it by the  [Save stationery layout window](#).


Note **Right margin** and **Bottom margin** are set automatically based on the other dimensions.




Click **OK** accept the changes and close the window. Click **Cancel** to discard any changes and close the window.

#### 5.10.33 Table order window





The  **Table order** window allows you to change the order of tables, as they are displayed in the  [Table chart pane](#) and  [Schematic pane](#). To display this window click the **Table order...** button at the top of the  **Table chart pane**.

Select a table and use the  **Up** and  **Down** buttons to change its order.

Click on the  **Sort** button to order tables. The sort is basically alphabetic, but is intelligent enough to order "table 10" after "table 2". The sort is not case sensitive.



Note You can also change the table order in the  **Schematic** pane by dragging and dropping tables or by using the  and  buttons at the top of the pane.



#### 5.10.34 Table properties window

The **Table properties** window allows you to show/edit table properties. To display this window select a single table in the  [Floor plan](#),  [Table plan](#) or  [Schematic](#) panes and select **Edit** >  **Properties** or the equivalent **Main** tool bar button.






**Name** is the name of the table. You can change this to anything you like. The name doesn't have to be unique and can be blank. To display the table name as 2 lines, with the second line in italics use a \*\* separator, for example:



Set **Angle** to the desired angle of the table in the  **Floor plan** and  **Table plan** panes.

Click the colour button to choose the colour of the table in the  **Floor plan** and  **Table plan** panes. This overrides any table colour set for the pane.


**Shape** is the shape of the table. The available shapes of table are:


Table	Icon	Meaning
Circular		a circular tables with seats all around it
Rectangular		a rectangular or square table with seats on four sides
Banquet		a long table with seats on two sides
Head		a long table with seats on only one side, for example a head (top) table at a wedding
Custom		a rectangular or square table with potentially



		different numbers of seats on each of the 4 sides
--	--	---






**Seats** is the number of seats. For a circular or head table you specify the total number of seats. For a banquet table you specify the number of seats across. For a rectangular table you specify the number of seats across and the number of seats down. For a custom table you specify the number of seats on each of the 4 sides.

Note For a square table create a rectangular table and set the number of seats **across** and **down** the same. You can specify a table with no seats for a cake, gift or serving table - it will not be shown in the  [Table chart pane](#).

**Size** is the size of the table. Check the **auto** check box to automatically size the table according to the number of seats and the seat size (as set in the  [Dimensions window](#)). Uncheck the **auto** check box to set your own table size.



**VIP** is used to designate tables for VIPs to sit at. The automatic assignment will attempt to seat VIPs on VIP tables.

**Notes** can be used to store any relevant notes for the table, e.g. details of table decorations. Click on **Stamp >>** to add a time and date stamped comment to the top of the **Notes**.

Click on the     buttons to display the properties of the first, previous, next or last table. The tables are ordered in the same sequence as they are in the  [Schematic pane](#).

Click **OK** to accept the changes and close the window. Click **Apply** to apply the changes without closing the window. Click **Cancel** to discard the changes.

#### 5.10.35 Text properties window

The **T** **Text properties** window allows you to show/edit text properties. To display this window select a single text item in the  [Floor plan pane](#) and select **Edit>**  **Properties** or the equivalent **Main** tool bar button.

**Text** is the content of the text.

Set **Angle** to the rotation angle of the text.
























Click the **Font...** button to set the font for the text.























Use the **Colour** button to set a colour for the text.

Click **OK** to accept the changes and close the window. Click **Apply** to apply the changes without closing the window. Click **Cancel** to discard the changes.

## 5.11 Drag and drop

The following drag and drop operations are supported:

Item	Modifier key	From	To	Result
 group(s) or  guest(s)	none	 <b>Guests</b> pane,  <b>Groups</b> pane,  <b>Schematic</b> pane,  <b>Floor Plan</b> pane or  <b>Table Plan</b> pane	seat, table or background in  <b>Floor plan</b> pane,  <b>Table Plan</b> pane or  <b>Schematic</b> pane	guest(s) (re) assigned/unassigned
 guest(s)	<i>Shift</i>	 <b>Guests</b> pane,  <b>Groups</b> pane,  <b>Schematic</b> pane,  <b>Floor plan</b> pane or  <b>Table plan</b> pane	seat, table or background in  <b>Floor plan</b> pane,  <b>Table plan</b> pane or  <b>Schematic</b> pane	all members of group(s) (re) assigned/unassigned
 group(s) or  guest(s)	none	 <b>Groups</b> pane	 <b>Groups</b> pane	group membership changed
background	none	 <b>Floor plan</b> pane or  <b>Table plan</b> pane	different position	scrolls

 table	none	 Floor plan pane	 Floor plan pane	table moved
 table	none	 Schematic pane	 Schematic pane	table order changed
 plan (.tp) file	none	operating system	 Guests or  Groups pane	open plan
 vCard (.vcf) file	none	operating system	 Guests or  Groups pane	import vCard
 text/CSV file	none	operating system	 Guests or  Groups pane	import text/CSV file
 group(s) or  guest(s)	none	 Guests pane,  Groups pane,  Schematic pane,  Floor plan pane or  Table plan pane	operating system or other application	export vCard

## 6 Importing

### 6.1 Importing

If you already have guest details (for example in an email or organiser address book, spreadsheet or text file) you can import the data directly into PerfectTablePlan, rather than re-typing it.

PerfectTablePlan can import information in 3 major formats:

- **Excel CSV (Comma Separated Value )** - A text file that can be produced by Excel (select **File>Save as** and choose .csv as the file type). Columns and rows are delimited by commas and carriage returns, respectively. " and , characters are quoted.

- **Delimited text data** - A text file with the user's choice of delimiters (separators). Many applications can produce data in this form. Excel CSV is a special form of delimited text data.
- **vCard file** - vCard files be exported from most applications with address books, including Outlook, Palm Pilot desktop and Apple Address Book.

As a simpler alternative to importing you can also use the [Insert guests scratch-pad window](#).

Note PerfectTablePlan cannot import table, seating or proximity data, as there is no established format for such data.

See also:

[Import window](#)




[Importing guests from vCard files](#)



[Importing guests from text and Excel CSV files](#)

## 6.2 Importing guests from vCard files

PerfectTablePlan can import guest information from vCard files. Many types of application can export contact information in vCard format, including personal organiser and email packages such as Apple AddressBook.


To import guest information from a vCard file:

- drag the vCard(s) files (extension .vcf) onto the  [Guests pane](#) or  [Groups pane](#) ; or
- select **File** >  **Import**, choose **vCard file** and click **OK**. Select the vCard file to import and click **Open**

In some application (such as Apple AddressBook) you can even drag vCards direct from the application into the  **Guests** or  **Groups** pane.

PerfectTablePlan will attempt to preserve groups defined in the vCard. Guests in the same group will have their proximity set to 'near to'.

To change the group and proximity of imported guests:

1. bring the  **Groups** pane to the front
2. drag and drop couples/families/groups into the same group (you can rename the group if required)
3. right click on each group and set the appropriate proximity
4. delete the empty groups

See also:




[Import guests tutorial](#)


[Import guest details from the Apple Address Book](#)

### 6.3 Importing guests from text and Excel CSV files

Many types of application can export data as text files, for example Excel can export CSV (comma separated value) files. PerfectTablePlan can import guest and group information from these files.

To import a text/CSV file either:

- drag the file onto the  [Guests pane](#) or  [Groups pane](#); or
- select **File** >  **Import**, choose **text/CSV file**, click **OK** and select a file to import

The **Import data** window will appear. For more information see  [Import data window](#) and the [Import guests tutorial](#).

See also:

[Import guest details from an Excel spreadsheet](#)

[Import guest details from Outlook](#)

[Import guest details from Outlook Express](#)

[Insert guests scratch-pad window](#)

## 7 Names and titles

### 7.1 Names and titles

Title is the guest's title (e.g. Mr) or rank (e.g. Captain). You can configure titles in the [Preferences window](#) - this can be particularly useful for military ranks, Masonic titles etc.

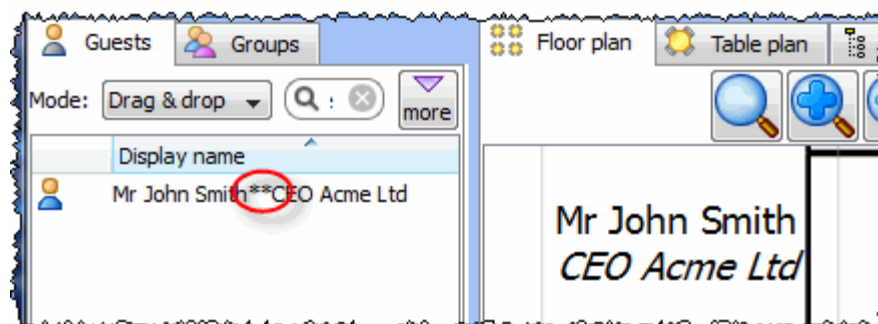
**First name** is the guest's first (given) name. You can also add middle names here or use initials, if you prefer.

**Last name** is the guest's last (family) name. If you don't know the name of your guest you can give them a generic name, e.g. set **Last name** to 'guest of John Smith' or 'Acme Ltd employee' and then fill the name in when you know it.

Note The **Title**, **First name** and **Last name** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) unless you have disabled this option in the [Preferences window](#).

**Display name** can include the guests' qualification, rank, post-nominal titles and/or role, e.g. Mr John Smith Phd, Master of Ceremonies. PerfectTablePlan will try to construct a sensible display name from the **Title**, **First name** and **Last name**, but you can change this at any time.

A standard convention for displaying names is to display the guests's name and title on the first line, followed by their role in italics on the second line. You can do this in PerfectTablePlan by using \*\* in the **Display name** field to separate the two lines. For example:



The [substitution fields](#) {guest\_display\_name\*\*1} and {guest\_display\_name\*\*2} can be used to display the parts of the **Display name** field before and after the \*\* separately in the [Stationery pane](#).

## 8 Groups

### 8.1 Groups

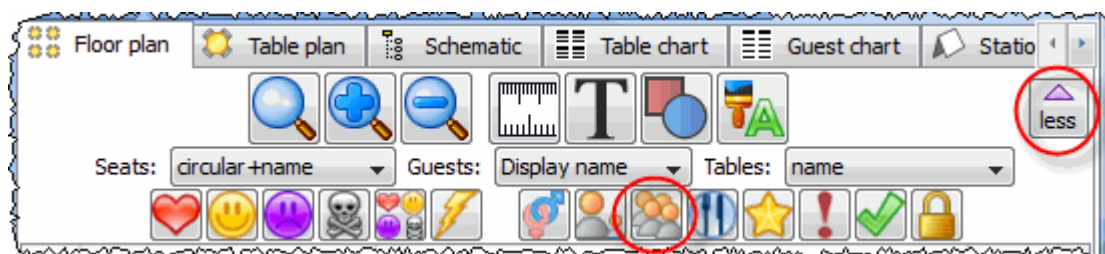
Every guest belongs to a group, even if they are the only member of the group, and each group has a single set of contact details. We therefore recommend that guests are grouped according to their address, e.g. by family or work-place. You can easily reassign guests between groups by dragging them to another group in the 👤 **Groups** pane or using **Edit>Change group....**

You can drag a whole group to the 🗺️ **Floor plan**, 🪴 **Table plan** or 📐 **Schematic** panes by either:

- dragging a group from the 👤 **Groups** pane; or
- holding down the *Shift* key and dragging a guest from that group from the 👤 **Guests**, 👤 **Groups**, 🗺️ **Floor plan**, 🪴 **Table plan** or 📐 **Schematic** panes

Whether guests should sit together is determined by the proximities set in the ❤️ **Proximity** pane and not by group. This gives you the flexibility to use the automatic assignment to separate members of a group (e.g. if you don't want to sit couples and work colleagues next to each other). However couples, families and groups are set to sit ❤️ **next to** or 🤝 **near to** each other by default.

You can easily see where different members of a group are sat by click on the 👤 **Groups** button in the 🗺️ **Floor plan** pane.







Different groups are shown in different colours for up to 100 groups - the colours are selected automatically.



## 9 RSVP status


### 9.1 RSVP status



RSVP stands for "Répondez s'il vous plaît", French for "Respond please".



PerfectTablePlan allows you to track RSVP status for each guest.

RSVP status		Description
	Unset	No RSVP status has been set.
	Sent	An RSVP has been sent, a reply is awaited.
	Accepted	The guest has accepted their invitation and will attend.
	Declined	The guest has declined their invitation and will not attend.
	Cancelled	The guest originally accepted and later declined.

You can (re)set the RSVP status in a number of ways, including selecting one or more guests or groups in the  **Guests** or  **Groups** pane and selecting **Edit>RSVP**.

Whether you can assign a guest to a seat depends on their RSVP status and the settings in the  [Preferences window](#).

You can show the RSVP status of guests in most panes, for example by clicking on the  button at the top of the  **Floor plan** pane.


You can see a summary of the RSVPs in the  [Statistics pane](#). You can estimate guest number and budget from RSVP status in the  [Numbers and budget window](#).



## 10 Seat assignment

### 10.1 Seat assignment


Guests can be assigned to seats by:

-  [automatic seat assignment](#); and/or
- [dragging and dropping](#) guests or groups onto seats

The automatic seat assignment takes account of any [proximities](#) you have set to create a harmonious seating plan (unless you have set it to random in the **Preferences** window). To get the best results it is usually advisable to use the automatic seat assignment and then fine-tune with drag and drop.

Note If you drop a guest onto a seat that is already assigned to a guest, the seats of the two guests will be swapped.

### Locking guests


If you wish to  lock a guest to a seat, so they can't be re-assigned by drag and drop or automatic seat assignment:

- select the guest(s)/group(s)/table(s)
- select **Edit>Locked**

Toggle the lock off in the same way.

Note You can lock a guest who has no seat assigned.

### RSVP status and assigning

Generally you won't want guests who have cancelled or declined their invitations to be assigned a seat. You can control which RSVP status guests are allowed to be assigned to seats in the  [Preferences window](#).

### Assigning to tables (not seats)



If you wish to assign guests to tables, rather than seats, you should still assign still assign seats but not include seat numbers in your final table chart, guest chart or

stationery.


## Unassigning

To unassign guests from seats:


- select the guest(s)/group(s)
- select **Edit>Unassign**

You can also drag a guest from their seat and drop them on the  **Floor plan** or  **Table plan** pane background to unassign them.

### 10.2 Automatic seat assignment


PerfectTablePlan will do an automatic seat assignment if you select **File>**  **Auto assign seats** or the equivalent **Main** tool bar button.

Unless you have set it to assign seats **randomly** (in the  [Preferences window](#)) the automatic assignment will attempt to:

- put people near to or not near to each other, according to your settings in the [Proximity pane](#) 
- not leave people on their own
- alternate males and females (unless you have unselected this in the **Preferences** window )
- assign VIP guests to VIP tables
- prioritise VIP guests

Note The automatic assignment may try to put 2 'near to' proximity guests next to each other if no 'next to' proximity guests are available.

It does this by assigning a score to each plan and using a [genetic algorithm](#) to try to find the highest scoring plan. you can check you have enough seats by looking at the [Status bar](#).

You can run **File>**  **Auto assign seats** as often as you like. Click on the **Stop** button


at any time during calculation to keep the best (highest scoring) plan so far. Select **Edit**>🔄**Undo** to go back to the previous plan.

Note Guests who have been 🔒 locked by you will not be (re)assigned by the automatic assignment.

## Scoring

A plan is scored as follows:


Criterion	Score
❤️ Next to proximity guests next to each other	+20
😊 Near to proximity guests next to each other	+5
🙅 Not next to proximity guests next to each other	-10
💀 Not near to proximity guests next to each other	-40
❤️ Next to proximity guests on same table	+10
😊 Near to proximity guests on same table	+2
🙅 Not next to proximity guests on same table	-5
💀 Not near to proximity guests on same table	-20



Male next to female	+2 (0 if you have disabled this in the  <b>Preferences</b> window)
★ VIP guest assigned to VIP table	+10
★ VIP guest not assigned to VIP table (if there is one)	-10
Guest with no-one sat next to them	-9
Guest not assigned a seat when (apart from locked guests and guests who aren't seated due to their RSVP status)	-100

In addition ★ VIP scores are multiplied by 3.

The scoring simply takes account of whether guests are sat next to or on the same table as other guests. It doesn't allow for whether the guests might be able to see each other or be within talking distance. This simplification allows the genetic algorithm to search the vast space of possible solutions reasonably quickly. You may have to tweak the automatic assignment a little 'by hand' to get the best possible result. For example you might have to move/rotate tables so that people who don't like each other aren't sat back to back. However you should find that the automatic assignment will be quite close to ideal, and this will save you a great deal of time.

## Time

You can set the stopping criteria for the automatic assignment in the  **Preferences** window. The automatic assignment time goes up rapidly with the number of guests. This is in the nature of combinatorial problems.

The longer the automatic assignment is run, generally the better it will be. Select **Edit** >  **Preferences** and on the **Auto assignment** tab click on **seconds** and set an appropriate number of seconds (1 hour = 3600 seconds). Then select **File** >  **Auto assign seats**.

Note if you have a single core/processor PC you won't be able to do much else on

your computer while the automatic assignment is running, as it will try to use all the power of the processor.

### 10.3 Genetic algorithm

You don't need to know how a genetic algorithm works to use PerfectTablePlan. This section is just included in case you are interested.

It isn't possible to try every combination of guests and seats, because there are so many. Even just 25 guests can be assigned to 25 seats in a staggering 15,511,210,043,330,985,984,000,000 different ways. So we have to find an efficient way to search through the possible assignments to find a good one in a reasonable time. PerfectTablePlan does this using a 'genetic algorithm'.

A genetic algorithm works by mimicking the Darwinian process of natural selection over successive generations:

1. An initial population of assignments is created using various rules of thumb ('heuristics').
2. The assignments are randomly mutated and spliced to produce new layouts.
3. Weak assignments (those with low scores) are eliminated from the population.
4. If the best assignment isn't satisfactory go to step 2.

Because of the way a genetic algorithm works, it cannot be guaranteed to give a mathematically optimal answer - sometimes you can spot ways to improve the assignment score with simple drag and drop. But if we were to use an approach that was guaranteed to give a mathematically optimal answer, it might take years to run! The PerfectTablePlan genetic algorithm will usually get close to an optimal solution in a reasonable time.

### Problem size

The number of combinations for seating  $n$  guests in  $n$  seats is  $n!$  ( $n$  factorial).  $3!$  is  $3 \times 2 \times 1$ .  $10!$  is  $10 \times 9 \times 8 \times 7 \times 6 \times 5 \times 4 \times 3 \times 2 \times 1$ . This means that the difficulty of the problem rises very rapidly with the number of guests. For example:

$$25! = 15511210043330985984000000$$

50! = 30414093201713378043612608166064768844377641568960512000000000000

100! =

933262154439441526816992388562667004907159682643816214685929638952175999  
932299156089414639761565182862536979208272237582511852109168640000000000  
00000000000000






200! =



788657867364790503552363213932185062295135977687173263294742533244359449  
963403342920304284011984623904177212138919638830257642790242637105061926  
624952829931113462857270763317237396988943922445621451664240254033291864  
1312274282948532775242407573903240321257405579568660226031904170324062  
3517008587961789222227896237038973747200000000000000000000000000000000  
000000000000000

So don't be surprised if PerfectTablePlan takes a while to do an automatic assignment for 1000+ guests.




## 11 Copying to the clipboard



### 11.1 Copying to the clipboard

You can copy the contents of the  **Floor plan**,  **Table plan**,  **Table chart**,  **Guest chart** and  **Statistics** panes to the clipboard for pasting into other applications (such as Microsoft Word). Bring the appropriate pane to the front of the **Top** pane and select **Edit>Copy** or the equivalent Main tool bar button.

The  **Floor plan** and  **Table plan** will be copied to the clipboard as an image.

Note If you want a larger image check **export/copy image as large as possible** in the  [Preferences window](#).

The  **Table chart**,  **Guest chart** and  **Statistics** panes will be copied to the clipboard as both plain text (no formatting) and HTML (some formatting). Which one is used will depend on the capabilities of the application you paste into, for example Word will use HTML and Notepad will use plain text.

Note that font size is not preserved when you copy a  **Table chart** or  **Guest chart** as HTML, as there is no reliable way to map between point size and HTML font size. You should be able to reset the font size easily enough in the other application. The chart layout can look cramped if the chart is too big for the page

you paste it into. You may be able to fix this by reducing the font size, changing the page orientation to landscape and/or reducing the number of columns in the chart.




You can also use **File>**  **Export** to transfer data to other applications via a file.

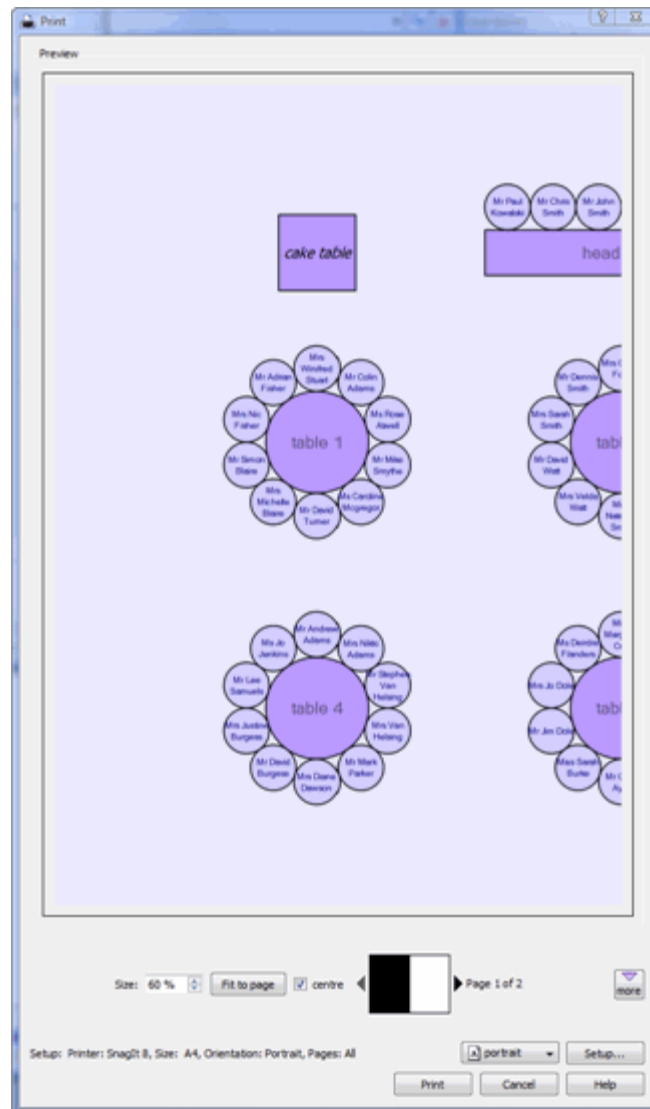
See also:

[Exporting](#)

## 12 Printing



### 12.1 Printing

You can print the contents of the  **Floor plan**,  **Table plan**,  **Table chart**,  **Guest chart**,  **Stationery** and  **Statistics** panes. Bring the appropriate pane to the front of the Top pane and select **File>**  **Print** or the equivalent **Main** tool bar button. The  [Print window](#) will appear.



The controls displayed will depend on the pane that you are printing.

If you only have a standard size (e.g. A4) printer you might find that text on the **Floor plan** pane isn't very legible when printed to a single A4 sheet. You may have to span multiple sheets or print it on a larger format printer. See [printing legible plans on a small format printer](#).

You can also [copy](#) or [export](#) your floor plan, table chart or guest chart to other applications, and print them from there, by using **Edit**>  **Copy** or **File**>  **Export**.

We would really appreciate a mention of [www.perfecttableplan.com](http://www.perfecttableplan.com) in the footer!



See also:

[Print window](#)

[Print setup window](#)

## 12.2 Stationery

In addition to floor plans, table charts and guest charts PerfectTablePlan can print various types of stationery, including:

- save the date cards
- invitations
- address labels
- place cards
- table cards
- escort cards
- badges
- personalised wine bottle labels and menus
- thank you cards

You can easily personalise the stationery for each guest, group or table using substitution text. For example, if you wish to add the display name and seat number of each guest to a place card you just add the substitution text `{guest_display_name}` and `{guest_seat}` to your design. This text will then be replaced by the appropriate values for each guest.

See also:

## [Stationery pane](#)

### [Print stationery tutorial](#)

## 13 Emailing


### 13.1 Emailing

This feature is not available on the Macintosh as there is no standard programmatic way of creating an email with an attachment.



## 14 Exporting

### 14.1 Exporting

Data in PerfectTablePlan can be exported in a variety of formats for use in other applications, such as image editors, spreadsheets and wordprocessors.

Select **File** >  **Export...** to display the **Export** window.

### data

Select **guest and seating data to text/CSV file** to export data in a flexible, text form for import by other applications, such as spreadsheets. The  **Export data** window will appear. This window allows you to specify which guest properties to export and what file format to use. For export to a spreadsheet or database you would typically export an Excel CSV file. See the  [Export data window](#) page for more details.

### vCard file

Select **guest data to vCard file** to export guest data in a form that can be imported into most applications with address books, including Outlook, Palm Pilot desktop and Apple Address Book. The **Export vCard** window will appear. This window allows you to specify which guests to export and whether to export each guest to a separate vCard file. See the [Export vCard window](#) page for more details.

### image




Select **floor plan to image** or **table plan to image** to export the  **Floor plan** or 

Table plan pane as an [raster or vector image file](#). You can choose to export in PDF (vector) or PNG, JPEG, BMP (raster) formats by changing the **Save as type** field.

PDF format gives the best quality when you need to enlarge an image. PNG is a good compromise between size and quality. JPEG files are small, but are of lower quality. BMP files can be very large and are not usually recommended. To export a BMP, JPEG or PNG image as large as possible check **export/copy image as large as possible** in the  [Preferences window](#).

Usage	Recommended format
Printing to poster size	PDF
Outputting to an image for modification in Photoshop/PaintShop/Paint	PNG
Sending an image by email	JPEG

## text

Select **table chart to text/CSV/HTML**, **guest chart to text/CSV/HTML** or **statistics to text/CSV/HTML** to export the appropriate pane as text. You can choose to export in Excel CSV, plain text or HTML format by changing the **Save as type** field in the **Export chart** window.

HTML retains some of the formatting, but not the font size as there is no direct way to translate point size into HTML. You should be able to reset the font size easily enough in the other application. Also the chart layout can look cramped if the chart is too big for the other application. You may be able to fix this by reducing the font size, changing the page orientation to landscape and/or reducing the number of columns in the chart.

See also:

[Export formats](#)

[Export window](#)

[Export data window](#)

[Export VCard window](#)

[Export to PDF format](#)

[Copying to the clipboard](#)

## 14.2 Export formats

PerfectTablePlan exports information in 7 major forms:

- **Excel CSV** (Comma Separated Value ) - A text file readable by Microsoft Excel. Columns and rows are delimited (separated) by commas and carriage returns, respectively. " and , characters are quoted.
- **Delimited text data** - A text file with the user's choice of delimiters. Useful for importing into a wide range of applications. Excel CSV is a special form of delimited text data.
- **vCard file** - vCard files be imported into most applications with address books, including Outlook, Palm Pilot desktop and Apple Address Book.
- **Raster image** (e.g. .PNG, .JPG and .BMP) - An image described as a 2 dimension array of coloured cells (pixels) that can be read by many graphics packages, such as Photoshop and Microsoft Paint.
- **Vector image** (e.g. PDF) - An image described in terms of primitive shapes, e.g. a circle of a given radius and position, that can be read by some drawing packages such as Adobe Acrobat.
- **HTML text** (e.g. .HTML) - A textual representation with layout and formatting that can be read into a web browser, such as Internet Explorer, Mozilla Firebird or Safari. Many wordprocessors, such as Microsoft Word, can also read HTML.
- **plain text** (e.g. .TXT) - A textual representation without layout and formatting that can be read into a wide range of applications.

Different formats are useful for different things. However there are important things to bear in mind when deciding whether to use raster or vector images:


- Raster images can degrade when resized, for example when printed to poster size. Vector images can normally be resized without problems.
- Raster images are much harder to edit than vector images, because a table is drawn as an array of many separate cells rather than a circle or a rectangle.
- Vector image formats are less widely supported than raster formats and can therefore be harder to print or modify.

## 15 Back-up files

### 15.1 Back-up files

There are many ways you can lose your work on a computer including: power outages; hardware failure; human error; and [software errors](#). To guard against this PerfectTablePlan can create back-ups of your plan files. This saves you from continually saving to a new name file, e.g. plan1.tp, plan2.tp etc.


Depending on the choices in the  [Preferences window](#) the software can create automatic back-ups of the software:

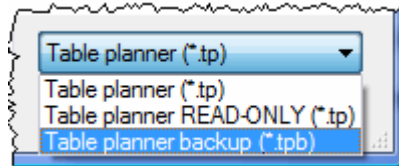
- every time you **File>**  **Save** the plan
- every time you do an auto-assignment
- every n minutes (assuming the plan has been changed in that n minutes)

Note Plans with more than 30 guests will only be backed up if you have purchased a licence key.

Backup files are created in a 'backup' folder in your plans folder. These back-ups are created with the extension .tpb (Table Plan Backup) and include a time and date stamp. For example, if you save myplan.tp at 17:42:05 on 11th February 2005 it will create a backup file myplan\_2005-02-11T17-42-05.tpb . If some problem occurs with myplan.tp (or you just want to compare it with the older version) you can open myplan\_2005-02-11T17-42-05.tpb and **File>Save as** it as a new .tp file.

To open a back-up file:

- select **File>**  **Open** or the equivalent **Main** tool bar button, the **Open** window will appear
- select **Table planner backup** **Table planner backup** in the **Enable** drop-down.



- navigate to the folder containing the backup files, usually:  
~\Documents\tableplans\backups
- select the back-up file you want and click the **Open** button

Note Any number of back-up files on your harddisk will be useless if your harddisk dies. Make sure you back up to separate storage devices.

## 16 Creating a good table plan

### 16.1 Creating a good table plan

For an up-to-date list of tips on how to create a good table plan [see our tips web page](#).

## 17 Multiple user access

### 17.1 Multiple user access

If you are using PerfectTablePlan across a network (e.g. 2 or more users accessing the same file on a shared disk) you need to be careful that users don't overwrite each other's changes.

File locking is not currently available on MacOSX.

## 18 Frequently asked questions

### 18.1 Frequently asked questions

For an up-to-date list of frequently asked questions see our [www.perfecttableplan.com](http://www.perfecttableplan.com) [FAQ page](#).

## 19 Integrating PerfectTablePlan

### 19.1 Integrating PerfectTablePlan

You may wish to use PerfectTablePlan to create a table plan from data produced by another software package, for example an event registration system. There are two ways you can do this.

#### Integrate via text/CSV file

If your software package can create a delimited text file (e.g. CSV file) you can output this and [import](#) it into PerfectTablePlan. If you are able to script/program the package you can get it to start PerfectTablePlan with the input file from the [command line](#).

For example to start up importing the file export.csv using the predefined 'theknot.com' mapping :

```
/Applications/PerfectTablePlan.app/Contents/MacOS/  
PerfectTablePlan -import export.csv -import_type theknot
```

Please email [sales@perfecttableplan.com](mailto:sales@perfecttableplan.com) if you are interested in us adding a mapping for your import file format.

#### Integrate via XML file

The above approach is sufficient for most needs, however it only allows you to supply guest details, not details of tables or seating. If you need to do this you can generate your own PerfectTablePlan plan file and start PerfectTablePlan to open it.

For example to start up PerfectTablePlan and open a myplan.tp file:

```
/Applications/PerfectTablePlan.app/Contents/MacOS/  
PerfectTablePlan myplan.tp
```

PerfectTablePlan plan (.tp) files are in a [simple text/XML format](#). Please email [sales@perfecttableplan.com](mailto:sales@perfecttableplan.com) if you need help with the format.

### 19.2 Command line arguments

PerfectTablePlan recognises the following command line syntax:

argument	Comments	Example
----------	----------	---------

<plan file>	The location of the .tp file to load at start-up.	myplan.tp
-import <import file>	The location of the data file to import on start-up.	-import import.csv
-import_type <import type>	A pre-defined import file type. PerfectTablePlan will look through the list of pre-defined types until it finds one that contains the string passed in. For example -import_type evite will match the pre-define type "evite.com export". This argument is ignored if -import is not specified.	-import_type evite

See also:

[Integrating PerfectTablePlan](#)

### 19.3 PerfectTablePlan file format

PerfectTablePlan plan (.tp) files are stored as text in an [XML format](#).

The format is fairly straightforward and you should be able to work out most of the details by creating a few .tp files from PerfectTablePlan and examining them. A few important points are noted below.

## Indexing

Where different records in the XML reference each other they do so by numerical indexes starting from 0.

### <version>

For PerfectTablePlan v3.1.0 you should set the version to 6, e.g.:

```
<version value="6" />
```



## **<guests>..</guests>**

This section contains details of all the guests.

The guest **group** attribute is the index of the corresponding group record.

The meaning of the **accepted** attribute is given below:

Accepted attribute	Meaning
0	Unset
1	Accepted
2	Sent
3	Declined
4	Cancelled

## **<groups>..</groups>**

This section contains details of all the groups.

## **<tables>..</tables>**

This section contains details of all the tables.

The meaning of the **shape** attribute is given below:

Shape attribute	Meaning
0	Circular
1	Rectangular

2-5	no longer used
6	Custom
7	Head
8	Banquet

The position of a table is recorded in pixels, with 167 pixels to a metre.

The table **assigned** attribute is a [url encoded](#) list of guests assigned to the seats of the table, e.g. an unencoded attribute "9,0,-1" means:

- seat 0 contains the guest with index 9
- seat 1 contains the guest with index 0
- seat 2 contains no guest

### <floorplan\_shapes>..</floorplan\_shapes>

This section contains details of the shapes added to the floor plan.

The meaning of the **shape** attribute is given below:

Shape attribute	Meaning
0	Circle
1	Ellipse
2	Square
3	Rectangle

## <floorplan\_text>.. </floorplan\_text>

This section contains details of the shapes added to the floor plan.

## <affinities>..</affinities>

This section contains details of all the guest proximities (who should sit next to who).

The affinity **guest1** and **guest2** attributes correspond to the 2 guests who the affinity is set for. If no affinity is set, neutral is assumed.

The meaning of the affinity **value** attribute is given below:

Value attribute	Meaning
0	Next to
1	Near to
2	Neutral
3	Not next to
4	Not near to

## <stationery>..</stationery>

This section contains details of the current stationery design.

## 20 How do I?

### 20.1 How do I?

This section covers common tasks that you might want to achieve. If you can't find the answer to your question here or in the rest of the Help try [the PerfectTablePlan FAQ page](#) . Most of these topics are available in a context-sensitive form from the **How do I?** button in the main tool bar.

[Add a chart title/footer](#)

[Add a dance floor, stage etc to the floor plan](#)

[Add a graphic or logo](#)

[Add a new stationery layout](#)

[Add a title or text into the floor plan](#)

[Add or remove dots at the end of titles](#)

[Arrange multiple seatings for an event](#)

[Assign guests to seats](#)

[Change fonts and/or colours](#)

[Change how guest names are displayed in the floor plan](#)

[Change proximity for multiple guests](#)

[Change the print pagination](#)

[Change the size of the room](#)

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[Copy guests from one plan to another](#)

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[Email my plan](#)

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[Export a chart to Excel/Word](#)

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[Handle guests with unknown names](#)

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[Import guest details from Apple Address Book](#)

[Import guest details from Excel spreadsheets](#)

[Import guest details from Outlook](#)

[Import guest details from Outlook Express](#)

[Import guests in couples/families/groups](#)

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[Rename a table](#)

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[Set the RSVP status for multiple guests](#)

[Show gender in the floor plan](#)

[Show groups in the floor plan](#)

[Show the proximity for one group at a time](#)

[Show unassigned seats](#)

[Track details of non-seated guests](#)


[Turn off guest name capitalisation](#)

[Turn the floor plan grid on/off](#)



[Zoom in/out of the floor plan](#)

## 20.2 Add a chart title/footer

To add a title/header/footer to the  **Table** chart or  **Guest** chart pane:

1. click on the  button at the top of the pane.
2. Click on the **Title** or **Footer** button.
3. Set the title/footer text, size and colour.
4. Click **OK**.

## 20.3 Add a dance floor, stage etc to the floorplan

You can use rectangular, square, elliptical or circular shapes to represent floor plan features such as dance floors, stages and walls. Click on the  **Shape** button at the top of the  **Floor plan** pane to add a shape to the floor plan.




## 20.4 Add a graphic or logo

At present you can't add graphics or logos to PerfectTablePlan. As a workaround

you can always pass the plan/chart/stationery through a printer twice and use another package to add the graphics/logo on the second pass.


## 20.5 Add a new stationery layout

PerfectTablePlan comes with a comprehensive library of stationery templates. This includes many sizes of labels and cards from leading stationery manufacturers. If we don't provide a template for the type of stationery you want to use:

1. At the top of the  **Stationery** pane click the  **Stationery layout** button. The  **Stationery layout** window will appear.
2. Set the various fields to the appropriate dimensions. You can choose **mm** or **inches**. Click on the **Nomenclature** tab for a visual representation of the various parameters. The layout is shown in the **Preview** tab.
3. Click **OK**. The **Save stationery layout** window will appear.
4. Complete the details for the new layout and click **OK** if you want it to be saved into the stationery database for next time.


## 20.6 Add a title or text into the floor plan


To add a title or text into the floor plan:


1. Click the **T** **Insert text** button at the top of the  **Floor plan** pane. The **T** **Insert text** window will appear.
2. Set the text, angle, font and colour.
3. Click **OK**. The new text item will be added.
4. Drag the new text item to the appropriate position.

Double click on the text item if you wish to edit it later.

## 20.7 Add or remove dots at the end of titles



“Mr” (without a dot) is standard in the UK and “Mr.” (with a period) is standard in the USA (ref: Longman Guide to English Usage 1988). In the interests of international relations you can toggle between the two by using the  **+period** (in

the **Main** window hold down the  key and press the '.' (period) key). If you don't like the results you can undo them.

If you want to use "Mr." (with a period) as standard you should edit the titles available in the **Titles** tab of the  [Preferences window](#).

## 20.8 Arrange multiple seatings for an event

If you have an event that includes several meals you might wish to have each person sit with different people at each meal. PerfectTablePlan can help you achieve this.

1. Do the first seating plan [as usual](#) and save the plan.
2. Right click on each table and set the proximity to  **Not near to**.
3. Select **File>**  **Auto assign seats**.
4. Use drag and drop to fine-tune the seating plan as required.
5. Select **File>Save as...** to save the plan to a new file.
6. If another seating is required go to 2.






Note If you have guests you don't want moved you can lock them to their seat.

## 20.9 Assign guests to seats

You can assign guests to seats by drag and drop, automatic seat assignment or a combination of both.

For more details see [seat assignment](#).

## 20.10 Change fonts and/or colours



In the  **Floor plan**,  **Table plan**,  **Table chart** or  **Guest chart** pane click on the  **Colours and fonts** button at the top of the pane.

In the  **Stationery** pane select the appropriate text and click on the **Font** and **Colour** buttons at the bottom of the  **Design** tab.




## 20.11 Change how guest names are displayed in the floor plan

To change how the name of a guest is displayed in the floor plan:



1. Click the  button at the top right of the  **Floor plan** pane.
2. Select the appropriate entry from the **Seats** drop-down list

## 20.12 Change proximity for multiple guests


To set the proximity for all the guests in a group (e.g. to set all the guests in a group to 'near to' each other):

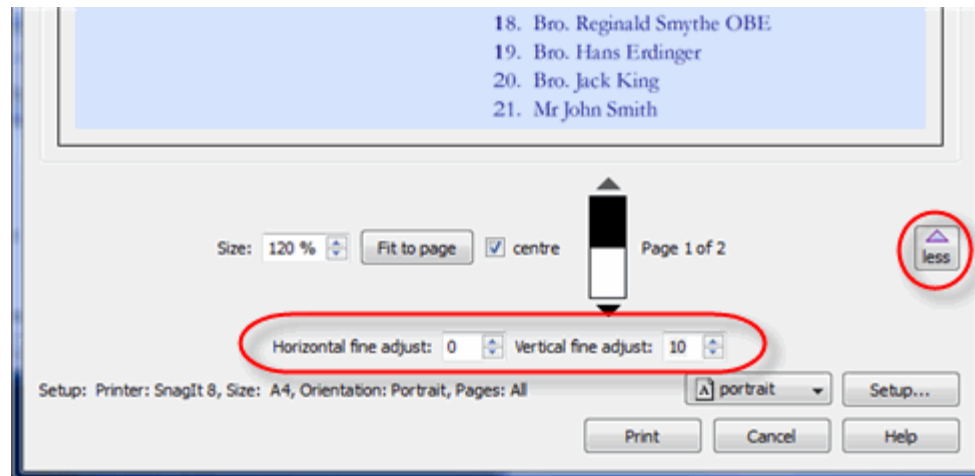
1. Right click on the group in the  **Groups** pane.
2. Select the proximity from the pop-up menu.

To set the proximity for multiple guests (e.g. to set 5 guests to have proximity 'near to' each other):

1. Use click/+click/*Shift*+click to select the appropriate guests in the  **Guests** pane.
2. Right click.
3. Select the proximity from the pop-up menu.



## 20.13 Change the print pagination

Use the fine adjust controls in the **Print** window. Click on the  button to show them.









## 20.14 Change the size of the room

To change the size of the floor plan:





1. Click on the  **Dimensions** button at the top of the  **Floor plan** pane.
2. Set the **Depth** and **Breadth** of the room in the appropriate **Units**.
3. Click **OK**.


## 20.15 Change the table order

The  **Table chart** and  **Schematic** panes show tables in a certain order. By default this is the order in which the tables were created, but you can change it by either:

- clicking on the **Table order...** button in the  **Table chart** or  **Schematic** pane; or
- dragging a table up or down the order in the  **Schematic** pane; or
- selecting a table and using the up and down arrows at the top of the  **Schematic** pane to change its position in the table order

To sort the tables in alphanumeric order:

1. Go to the  **Table chart** or  **Schematic** pane (click on the  button at the top-right of the  **Table chart** pane).

2. Click on the **Table order...** button.
4. Click the  **Sort** button.
5. Click **OK**.

## 20.16 Choose a format to export to

- To create a high quality image suitable for printing to large sizes, choose PDF.
- To create a medium quality image suitable for printing to smaller sizes, choose PNG.
- To create a low quality image suitable for emailing, choose JPG.
- To import into Word or create a web page, choose HTML.
- To import into Excel, a database or other application, choose CSV.

For more details see [exporting](#).

## 20.17 Copy guests from one plan to another

Just drag the guests from one plan to the other:

1. Start 2 instances of PerfectTablePlan. You may have to duplicate the `PerfectTablePlan.app` file before you can do this.
2. Select the guests you want to copy from the **Guests** or **Groups** pane of the first instance of PerfectTablePlan (⌘+A to select all).
3. Drag the guests/groups to the **Guests** pane of the second instance of PerfectTablePlan.

You can also export the guest data to a .csv file and re-import it, but drag and drop is easier.

Note You may not be able to drag guests between 2 instances of PerfectTablePlan in MacOSX 10.5. You can work around this by:

1. Dragging the guests from the **Guests** or **Groups** pane to the desktop (or any

other folder), which creates vCard files.

2. Dragging the vCard files to the **Guests** pane of the new plan.

See also:

[Create a re-useable floor plan template](#)

## 20.18 Create a re-useable floor plan template

To Create a floor plan template that you can re-use for similar events:

1. Create a new plan with a standard table layout.
2. **File>Save as** to a new file, e.g. 'template.tp'.

Each time you need to create a new plan based on the template:

1. **File>Open** the template plan you created.
2. **File>Save as** to a new plan file, e.g. 'event.tp'
3. Add guests.


See also:


[Copy guests from one plan to another](#)

## 20.19 Customise standard guest titles

You can add your own custom titles to PerfectTablePlan. These could be military or Masonic titles or foreign language equivalents of Mr/Mrs/Master/Miss. These custom titles can have default gender, age and VIP status, which is particularly useful when you are importing guests with known titles.

To add custom titles:

1. Open the  [Preferences window](#).
2. Select the **Titles** tab.

3. Click on  **Add**.

4. Type a name and select a default gender, age and VIP status.

5. Click **OK**.

Titles in your current plan can be imported by clicking on **Import from current plan**.

You may also wish to set the **Default couple** titles.

## 20.20 Email my plan

To email a copy of your plan to someone with PerfectTablePlan:

1. **File** >  **Save** your plan.

2. Compose an email in your standard email package and attach the saved plan (.tp) file.



Note If they don't need to save, print or export your plan they can [download and use the free trial version of PerfectTablePlan](#).

To email a copy of your plan to someone without PerfectTablePlan:

1. Export your plan into the [appropriate format](#).

2. Compose an email and add the exported file as an attachment.

## 20.21 Estimate numbers and budget

Select **File** >  **Numbers and budget...** and use the  [Numbers and budget window](#) to estimate guest numbers and help keep track of your budget.

## 20.22 Export a chart to Excel/Word


To export the contents of the  **Guest chart**,  **Table chart** or  **Statistics** pane to Word or Excel:

1. Bring the  **Guest chart**,  **Table chart** or  **Statistics** pane to the front.

2. Select **Edit>Copy** from the menu bar (not **⌘+C**, this only copies selected text).
3. Start Word/Excel.
4. Select **Edit>Paste** in Word/Excel.

### 20.23 Export guest and seating data to Excel



To export guest and seating data into a form that it can be used in Excel:

1. Select **File>** **Export**. The **Export** window will appear.
2. Select **guest and seating data to text/CSV file** and click **OK**. The **Export data** window will appear.
3. Select whether you want to export a record per **guest** or per **group** and check/uncheck the appropriate check boxes. Leave the format as **Excel CSV**.
4. Edit the **Export file** field or click on the **Browse** button to set the output file.
5. Click **OK**.

The CSV file created should be readable by Excel.

### 20.24 Export to PDF format

PDF is a [vector image format](#) popularised by Adobe Acrobat. Many print shops will prefer PDF format if you want to print a  **Floor Plan**,  **Table Chart** or  **Guest Chart** to poster size. Direct PDF export is supported in PerfectTablePlan from v3.1.0. For example, to export the  **Floor Plan** pane as a PDF:

1. Select **File>** **Export**, the  **Export** window will appear.
2. Select **floor plan to PDF/PNG/JPG/BMP image file**.
3. Click **OK**, the **Export Floor plan** window will appear.
4. select the file type as **PDF**, choose a file name and location and click **Save**, the **Export PDF** window will appear.
5. Select the appropriate **Size** and **Orientation** for the PDF and click **OK**.

If you have problems with built-in PDF export you can also export PDFs indirectly, as described below.

## Creating PDFs indirectly on Macintosh

The ability to print straight to a PDF document is built into MacOSX, you don't need to install any additional software.

- Select **File>Print**, the PerfectTablePlan **Print** window will appear.
- Click the **Setup...** button, the MacOSX Print window will appear.
- Drag the PDF button down to **Save as PDF....**
- Choose a location for the file in the **Save** window and click **Save**, the **Page Setup** window will appear.
- Choose the page setup and click **OK**.
- Click **OK** on the PerfectTablePlan **Print** window.

A PDF format document should now have been created.

## Checking the output

You can check that the PDF output is acceptable using the free [Adobe Acrobat reader](#). Many web browsers can also read PDF files.


### 20.25 Handle guests with unknown names

Give them last names such as "guest of John Smith 1", "guest of John Smith 2" and then replace this with their proper name when you know it.

### 20.26 Handle post-nominal titles

Most titles come before the name, e.g. Dr, Herr, Colonel etc. These are handled by the Title field in the [Guest properties window](#). You can configure the titles available by default in the [Preferences window](#).

However some titles come after the name, e.g. PhD or MBE (post-nominals). These

are best handled by adding them individually to the **Display name** field in the  **Guest properties** window. For example you might have:



Field	Example
Title	Sir
First name	John
Last name	Smith
Display name	Sir John Smith MBE

See also [Names and titles](#).



## 20.27 Import guest details from Apple Address Book


To import guests from Apple Address Book to PerfectTablePlan:

**MacOSX 10.3.9 or MacOSX 10.4.x:**

1. select the appropriate group(s) or person(s) in the Apple Address Book
2. drag them to the  **Guests** pane or  **Groups** pane in PerfectTablePlan

**MacOSX 10.5.x:**

1. select the appropriate group(s) or person(s) in the Apple Address Book
2. drag them to your Mac OS X desktop to create a vCard file
3. drag the vCard file to the  **Guests** pane or  **Groups** pane in PerfectTablePlan

Guests in the same group will have their proximity set to 'Near to'. You can easily change this by right clicking on the group and changing the proximity. PerfectTablePlan will attempt to maintain groups, but you can easily rearrange guests into groups afterwards by dragging guests between groups in the PerfectTablePlan  **Groups** pane.



## 20.28 Import guest details from Excel spreadsheets

If you already have guest information in a Microsoft Excel™ spreadsheet you can import it, rather than re-typing it.



See the [Import guests tutorial](#) and [Importing guests from text and Excel CSV files](#).


## 20.29 Import guest details from Outlook

If you already have guest information in Microsoft Outlook™ you can import it, rather than re-typing it.

Note The user interface of Outlook may differ between different versions.

### Method 1: Drag and drop

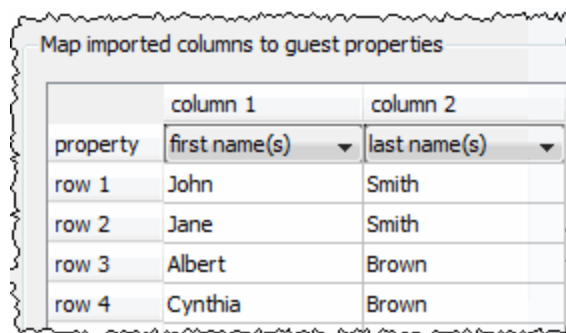
1. Start Microsoft Outlook (we can accept no liability for you installing or using third party software).
2. Select **Tools>Address book** to display the Outlook **Address Book** window.
3. Select one or more guests in the **Address Book** window.
4. Drag the guests to the PerfectTablePlan  **Guests** pane or  **Groups** pane.

Note You can easily rearrange guests into groups afterwards by dragging guests between groups in the PerfectTablePlan  **Groups** pane.

### Method 2: Import CSV file

1. Start Microsoft Outlook (we can accept no liability for you installing or using third party software).
2. Select **File>Import and Export**. The **Import and Export Wizard** window will appear.
3. Select **Export to a file** and click the **Next** button.
4. Select **Comma separated values (Windows)** and click the **Next** button.
5. Select **Contacts** and click the **Next** button.

6. Choose a name and location for the exported file e.g. outlook.csv and click the **Next** button.
7. Click **Finish**.
8. Start PerfectTablePlan.
9. Select **File>Import**, select **text/CSV file** and click **OK**. An **Open** window will appear.
10. Navigate to the Outlook export file and click the **Open** button. The **Import data** window will appear.
11. In the table select **first name** in the drop-down for the column with the first name and last name in the drop-down for the column with the last name. You can also choose other guest properties as appropriate.



	column 1	column 2
property	first name(s) ▼	last name(s) ▼
row 1	John	Smith
row 2	Jane	Smith
row 3	Albert	Brown
row 4	Cynthia	Brown

15. Edit the text in the preview as appropriate.
  16. Click the **OK** button. The guests will now be added to the plan.
- If you wish to import guests as couples, families and/or groups you need to:

1. have a groups column in your spreadsheet
2. use the same name in the group column for each person in the couple, family or group
3. make this column the **group** field during import

Map imported columns to guest properties

	column 1	column 2	column 3
property	first name(s) ▼	last name(s) ▼	group ▼
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

These guests will then be placed in the same group with proximity selected in **Proximity for guests in same group**. You can easily change the proximity by right clicking on the group and selecting the appropriate proximity later.



For more information see [Import data window](#) and Microsoft Outlook™ documentation.


### 20.30 Import guest details from Outlook Express

If you already have guest information in Microsoft Outlook Express™ you can import it, rather than re-typing it.

Note The user interface of Outlook Express may differ between different versions.

#### Method 1: Drag and drop

1. Start Microsoft Outlook Express (we can accept no liability for you installing or using third party software).
2. Select **Tools>Address book** to display the Outlook Express **Address Book** window.
3. Select one or more guests in the **Address Book** window.
4. drag the guests to the PerfectTablePlan  **Guests** pane or  **Groups** pane.

Note You can easily rearrange guests into groups afterwards by dragging guests between groups in the PerfectTablePlan  **Groups** pane.

#### Method 2: Import CSV file

1. Start Microsoft Outlook Express (we can accept no liability for you installing or using third party software).
2. Select **File>Export>Address book**. The **Address Book Export Tool** window will appear.
3. Select **Text file (Comma Separated Values)** and click on the **Export** button. The **CSV Export** window will appear.
4. Choose a sensible name and location for the export file and click the **Next** button.
5. Check all the fields you wish to export. This should include **First Name** and **Last Name**.
6. Click the **Finish** button.
7. Click the **OK** button.
8. Start PerfectTablePlan.
9. Select **File>📁Import**, select **text/CSV file** and click **OK**. An **Open** window will appear.
10. Navigate to the Outlook Express export file and click the **Open** button. The 📁 **Import data** window will appear.
11. In the table select **first name** in the drop-down for the column with the first name and last name in the drop-down for the column with the last name. You can also choose other guest properties as appropriate.

Map imported columns to guest properties

	column 1	column 2
property	first name(s) ▼	last name(s) ▼
row 1	John	Smith
row 2	Jane	Smith
row 3	Albert	Brown
row 4	Cynthia	Brown

15. Edit the text in the preview as appropriate. Use the **Add row** and **Delete row**

buttons to add and remove rows.

16. Click the **OK** button. The guests will now be added to the plan.

If you wish to import guests as couples, families and/or groups you need to:

1. have a groups column in your spreadsheet
2. use the same name in the group column for each person in the couple, family or group
3. make this column the **group** field during import

	column 1	column 2	column 3
property	first name(s)	last name(s)	group
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

These guests will then be placed in the same group with proximity selected in Proximity for guests in same group. You can easily change the proximity by right clicking on the group and selecting the appropriate proximity later.

For more information see [Import data window](#) and Microsoft Outlook™ Express documentation.

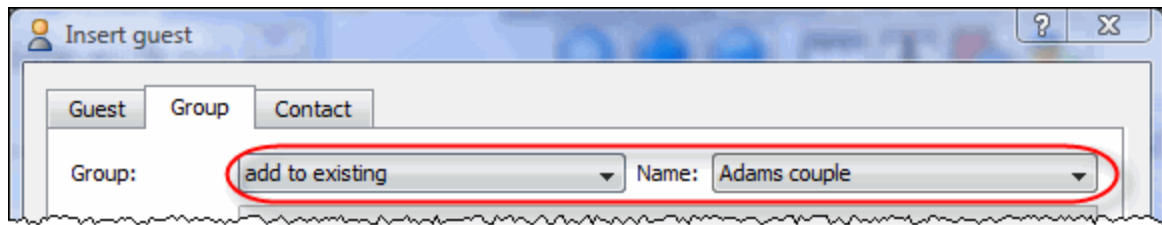
### 20.31 Import guests in couples/families/groups

You can import guests in groups by using a 'group' column during import. For more details see Importing groups [here](#).

### 20.32 Insert a new guest into an existing group

To add a guest to an existing group:



- Select **Insert>Single guest**, the **Insert guest** window will appear.
- Choose **Add to existing** from the **Group** drop-down list in the **Group** tab.





### 20.33 Liaise with caterers

The easiest way to send your seating plan to your caterer is to [email the plan file](#). They can [download](#) a free version of PerfectTablePlan to look at it (they will need a licence to save changes). Alternatively you can export and email the information they will need in a range of formats.





## Total numbers and meal choices

You can print or export this information from the  **Statistics** pane (note that meal courses and special requirements will be totalled separated if they are separated by commas, e.g. soup,fish,flan). Use **File>**  **Export** and select **statistic to text/CSV/HTML file** to export an [HTML or text file](#).

## General layout, size and shape of tables

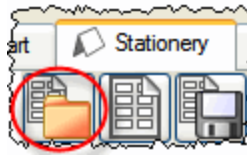
You can print or export this information from the  **Floor plan** pane. Use **File>**  **Export** and select **Floor plan to image file** to export an [image file](#).

## Who is sitting where, meal choices and special requirements

You can print or export this information from the  **Table chart** pane or  **Table plan** pane for each table. Ensure the **notes**, **special** and **meal** information is displayed. Use **File>**  **Export** and select **table chart to text/CSV/HTML file** to export a text, CSV or HTML file. Use **File>**  **Export** and select **Table plan to image file** to export an image file.

### 20.34 Load sample stationery

Some sample stationery templates are installed with PerfectTablePlan. To load a sample click on the **Load stationery** button at the top of the **Stationery** pane.





The sample are installed into different locations on different operating system. On MacOSX you may have dragged them from the disk image file to your Documents folder.

### 20.35 Lock guests to seats

You can lock a guest to a seat (or to no seat) to stop them being re-assigned by drag and drop or automatic seat assignment.


To toggle the lock status of a guest on/off:

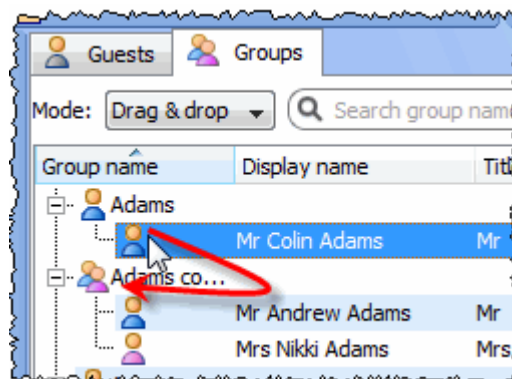
1. Right click on the guest.
2. Select **Locked** from the pop-up menu.

Note You can select multiple guests in the  **Guests** or  **Groups** pane using **⌘+click**/**Shift+click**.

You can also lock all the guests in a group or at a table by right clicking on the group/table and selecting **Locked** from the pop-up menu.



### 20.36 Move guests from one group to another

Select the guest in the  **Groups** pane and drag them to the appropriate group. You can also use **Edit>Change group**.



### 20.37 Only assign guests who have accepted

You may wish to assign to seats only those guests who have accepted your invitation.



1. Select **Edit>Preferences**. The  [Preferences window](#) will be displayed.
2. Select **Accepted** in the **Allow seat assignment with RSVP** drop-down menu.
3. Click **OK**.
4. If you have unaccepted guests assigned you will have the option to unassign them. Click **Unassign**.
5. If you have unassigned guests select **File>**  **Auto assign seats**. Only guests who have accepted will be assigned to seats.

### 20.38 Order a bespoke plan online


We have partnered with some leading table plan/seating chart companies to make it as easy as possible for you to get a large-format bespoke print. [Click here for details](#).

### 20.39 Print a guest list

To print a list of all the guests (including unassigned guests):

- Bring the  **Guest chart** pane to the front of the **Top** pane.
- Select **All** from the **Show** drop-down list at the top of the pane.
- Select **File>**  **Print** or the equivalent **Main** tool bar button.

### 20.40 Print place cards, invitations, address labels etc

You can design and print various types of stationery from the  [Stationery pane](#). PerfectTablePlan makes it very easy for you to merge in the guest names, contact details, seat assignments etc.

For more details see the [Printing Stationery tutorial](#).

You can also [load sample stationery](#) we install with the software.





See also:

[Printing stationery](#)

## 20.41 Print legible plans on a small format printer

If you only have access to a standard format (e.g. A4 or letter) printer it can be difficult to print a legible floor plan on a single sheet. Here are some suggestions:

- Print the 🍷**Floor Plan** pane on multiple sheets of paper and join them together.
- Print each table on a separate page from the 📄**Table plan** pane.
- Set the 🍷**Floor Plan** pane to display seat numbers, instead of names, by selecting **Seat reference** from the **Display** drop-down. Set the 📄**Table chart** pane to display seat numbers as well as names. Print out both 🍷**Floor plan** and 📄**Table chart** panes. The floor plan can then be cross-referenced against the table chart.
- Select **Name only (radial)** from the **Seats** drop-down list at the top of the 🍷**Floor Plan** pane.
- Move the tables closer together in the 🍷**Floor Plan** pane. This will make them appear bigger when scaled to fit the page.
- Increase the size of the fonts in the 🍷**Floor Plan** pane by clicking on the 🗑️ button. The size of table and seat fonts can be set separately.
- Export the floor plan as an image and ask a someone with a larger format (e.g. A3 or A2) printer to print it for you. Check **export/copy image as large as possible** in the ✓[Preferences window](#) to increase the resolution of the image. Set **export/copy image margin** to 0% in the ✓**Preferences** window to reduce the unused area. If you want to print it at high resolution you should also consider [exporting it as a PDF](#).
- [Order a bespoke large-format plan online from one of our partners.](#)

## 20.42 Print to poster size





You can get a poster size print by printing across multiple sheets of paper and sticking them together.


If you want a large print without joins we recommend you [export it to PDF format](#) and send it to a company with a large format printer, e.g. Fedex Kinko. PDF is accepted by most print shops and can be re-sized large without noticeable loss of quality. [Raster image formats](#) such as PNG and JPG can degrade significantly when enlarged.

Alternatively you can order a [bespoke table plan](#) from one of our partners.


## 20.43 Rename a table

To rename a table:

1. Select the table in the  **Floor plan**,  **Table plan** or  **Schematic** pane
2. Select **Edit** >  **Properties** from the menu bar.
3. Change the name.
4. Click **OK**.

You can also display the  **Properties** window by double-clicking on the table or selecting **Properties** from the right-click menu.

To rename large numbers of tables:




1. Go to the  **Schematic** pane
2. Select **Edit** from the **Mode** drop-down list at the top of the pane
3. Retype the table names

## 20.44 Retrieve old versions of the plan

You may be able to access old versions of your plan from automatic [back-up files](#) made by PerfectTablePlan.

## 20.45 Set the RSVP status for multiple guests



To change the RSVP status of multiple guests:

1. Select multiple guests in the  **Guests** or  **Groups** pane using +click/*Shift*+click.
2. Right-click and select the appropriate RSVP status from the pop-up menu.

You can also right-click on a group to set the RSVP status of everyone in the group.

## 20.46 Show gender in the floor plan

To show gender in the  **Floor plan** or  **Table plan** pane:

1. Click on the  button at the top-right of the pane.
2. Click on the  **Gender** button. Males will be shown in blue and females in pink.



Note This option is only available if you are displaying circular seats.

See also:

[Floor plan pane](#)

## 20.47 Show groups in the floor plan

To show groups in the  **Floor plan** or  **Table plan** pane:

1. Click on the  button at the top-right of the pane.
2. Click on the  **Groups** button. Each group will be shown in a different colour (or combination of colours). You cannot change the colours.

Note This option is only available if you are displaying circular seats.

See also:

[Floor plan pane](#)

## 20.48 Show the proximity for one group at a time

To show the proximities for one group at a time in the ❤️ Proximity pane:

1. Click on the 📄 button at the top-right of the pane.
2. Set the **Shown** drop-down list to **by group**. Use the ⬅️ ➡️ buttons or the drop-down list to change group.

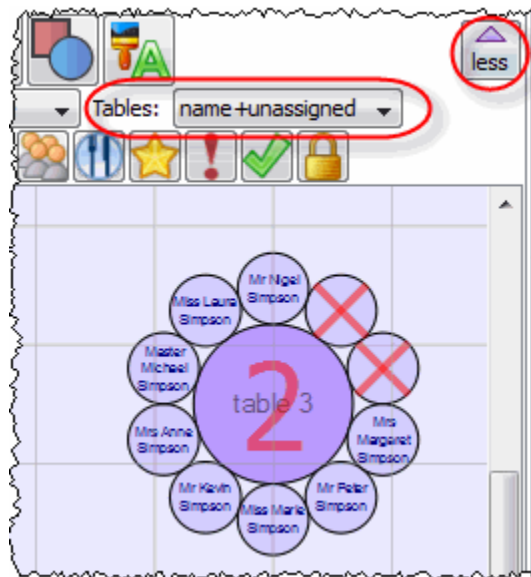
See also:

[Proximity pane](#)

## 20.49 Show unassigned seats

To show unassigned seats in the 🍽️ Floor plan or 📅 Table plan pane:

1. Click on the 📄 button at the top-right of the pane.
2. Set the **Tables** drop-down list to **name+unassigned**. The number of unassigned seats will be shown in the centre of each table and unassigned seats will be shown with a red cross.



See also:

[Floor plan pane](#)

## 20.50 Track details of non-seated guests




You may have guests that are attending your event, but won't require a seat at the dinner. We recommend that you track their RSVPs as normal but [lock](#) them with no seat assigned to ensure they won't be inadvertently assigned a seat. You might also want to add a reminder in their **Notes** field, e.g. "evening only guest".

## 20.51 Turn off guest name capitalisation

By default the first letter of each guest names is capitalised. To turn this off uncheck **automatically capitalise names** in the **General** tab of the [Preferences window](#).

## 20.52 Turn the floor plan grid on/off

The floor plan has 2 separate grids - a drawn grid (for display only) and a snap grid (which 'snaps' the centres of items to a discrete position) .To turn these grids on/off:

1. Click the  **Dimensions** button at the top of the  **Floor plan** pane. The  **Dimensions** window will be displayed.
2. Check/uncheck the **Draw grid** check box to turn the drawn grid on/off.
3. Check/uncheck the **Snap to grid** check box to turn the snap grid on/off.
4. Change the **Units** drop-down list or **Size** fields to change the grid sizes.
5. Click **OK**.

See also:


[Dimensions window](#)

## 20.53 Zoom in/out of the floor/table plan

To zoom so all items are visible click the  **Zoom all** button at the top of the pane.

To zoom in click the  **Zoom in** button at the top of the pane.

To zoom out click the  **Zoom out** button at the top of the pane.

You can pan from side to side while zoomed in by left-clicking on the  **Floor plan** pane background and dragging it.

See also:


[Floor plan pane](#)

## 21 Licensing

### 21.1 Licensing

In order to use this software fully you will need a valid licence key. Without a licence key you can only save, export or print plans with 30 or fewer guests.

To purchase a licence key go to [www.perfecttableplan.com](http://www.perfecttableplan.com) .

To fully activate the software select **Licensing>Licence** and enter the key into the  [Licence window](#).

If you purchased the software electronically off the Internet, the key will have been emailed to you.

If you purchased the software as a CD, the licence key will either be printed inside the box or will have been emailed to you.

To retrieve a licence you have previously purchased from [www.perfecttableplan.com](http://www.perfecttableplan.com) select **Licensing>Retrieve key**.

Note A licence entitles one named person to use this software on any number of computers. If you have more than one person using the software you should purchase a licence key for each user. However, we have no objection to a couple sharing a licence when planning their wedding.

The same licence key will work on both Windows and Macintosh.

Version 2 licence keys are not valid for version 3. You can [upgrade from version 2 to version 3](#).

## 22 Support

### 22.1 Contact support

If you are having problems with the software please check if your question has already been answered in this documentation or on the [www.perfecttableplan.com](http://www.perfecttableplan.com) [FAQ page](#). If you can't find an answer here or on the web site then email us at [support@perfecttableplan.com](mailto:support@perfecttableplan.com) . We will reply as quickly as we can.

### 22.2 Report a bug

We take every effort to deliver high quality software. However, the sheer complexity of software and the number of platforms and configurations we have to support means that we can't guarantee our software is completely bug free. Please report any bugs you find to [sales@perfecttableplan.com](mailto:sales@perfecttableplan.com) and we will attempt to fix them. Please include:

- a description of the bug
- your operating system (e.g. Windows XP or MacOSX 10.4)
- the version of PerfectTablePlan (from the [About window](#))
- a step-by-step description of how we can reproduce the problem

The step-by-step description is particularly important - if we can't reproduce your problem, then we probably won't be able to fix it.

To assist us in fixing bugs we have added email-based error reporting. When PerfectTablePlan detects that something has gone horribly wrong it will try to email a report to [sales@perfecttableplan.com](mailto:sales@perfecttableplan.com) (with your permission). Please send the email and add any relevant details.

### 22.3 Request an enhancement

We are always very interested to hear your suggestions on how the software can be improved. Please email us at [support@perfecttableplan.com](mailto:support@perfecttableplan.com) .

## 23 Updates

### 23.1 Updates

From time to time we release new versions of the software with new features and/or bug fixes. Minor updates are available for no charge (e.g. v3.0.0 and v3.1.1 will both work with a v3 licence key). Major updates require a licence key upgrade (e.g. a v2 licence key will not work with version 3.0.0). If you purchased a licence key close to a major upgrade you may get a free upgrade licence key. See our [licensing page](#) for details of our upgrade policy.

To check which version of the software you are running look in the [About window](#).

To check if you are running the latest version select **Help>Check for updates**. This requires an Internet connection.

PerfectTablePlan will also check for software updates automatically. You can set it to check for updates monthly, weekly or never in the [Preferences window](#) (the default is weekly). It will only advise the availability of updates, you still have to download and install the update from a web page.

You can also subscribe to our email [newsletter](#) for update information.

### 23.2 Newsletter

If you [subscribe to our newsletter](#) you will receive occasional email newsletters telling you when new releases of this software become available, and other useful information. You can always unsubscribe at a later date and we won't sell your details to anyone else.

## 24 Uninstalling

### 24.1 Uninstalling

To uninstall PerfectTablePlan drag the PerfectTablePlan application from `Applications` (or wherever you installed) to the waste bin.

Note You may also wish to delete any table plan files from the `Documents` folder.



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