



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

Table of Contents

PerfectTablePlan 4.1.0

| | | |
|----------|-----------------------------------|-----------|
| 1 | Getting started..... | 7 |
| | Introduction | 7 |
| | Introduction..... | 7 |
| | Conventions in this document..... | 7 |
| | System requirements..... | 8 |
| | The help system..... | 8 |
| | Quick start guide | 9 |
| | Quick start guide..... | 9 |
| | Movies | 19 |
| | Movies | 19 |
| | Tutorial | 20 |
| | Tutorial | 20 |
| | 1. Getting started..... | 20 |
| | 2. Add guests..... | 23 |
| | 3. Set proximity..... | 31 |
| | 4. Add tables..... | 32 |
| | 5. Assign guests..... | 36 |
| | 6. Assess plan..... | 39 |
| | 7. Print plan..... | 42 |
| | 8. Print stationery..... | 44 |
| | 9. Import guests..... | 49 |
| | Editions | 57 |
| | Editions | 57 |
| 2 | Reference | 59 |
| | User interface | 59 |
| | Main window..... | 59 |
| | Menu bar..... | 61 |
| | Task tool bar..... | 61 |
| | Main tool bar..... | 62 |
| | Insert tool bar..... | 64 |
| | Status bar..... | 65 |
| | Left pane..... | 66 |
| | Left pane | 66 |
| | Guests pane | 66 |
| | Groups pane | 68 |
| | Top pane..... | 70 |
| | Top pane | 70 |
| | Floor Plan pane..... | 71 |
| | Table Plan pane..... | 75 |
| | Schematic pane..... | 79 |
| | Table Chart pane..... | 80 |
| | Guest Chart pane..... | 81 |
| | Stationery pane..... | 82 |
| | Report pane | 90 |
| | Bottom pane..... | 92 |
| | Bottom pane | 92 |

| | |
|---|------------|
| Proximity pane | 92 |
| Custom Field Proximity pane..... | 93 |
| Windows | 94 |
| Windows | 94 |
| About window | 96 |
| Change Group window..... | 96 |
| Chart Title/Footer window..... | 97 |
| Custom Fields window..... | 97 |
| Dimensions window..... | 101 |
| Export window | 104 |
| Export Data window..... | 104 |
| Export PDF window..... | 105 |
| Export VCard window..... | 105 |
| Fonts and Colours window..... | 106 |
| Group Properties window..... | 107 |
| Guest Properties window..... | 108 |
| Image Properties window..... | 110 |
| Import window | 112 |
| Import Data window..... | 112 |
| Information window..... | 120 |
| Insert Couple window..... | 120 |
| Insert Family window..... | 123 |
| Insert Image window..... | 126 |
| Insert Group window..... | 127 |
| Insert Guest window..... | 130 |
| Insert Shape window..... | 133 |
| Insert Table window..... | 134 |
| Insert Text window..... | 136 |
| Join Columns window..... | 137 |
| Licence window..... | 137 |
| Most Recently Accessed window..... | 138 |
| Numbers and Budget window..... | 139 |
| Preferences window..... | 140 |
| Print window | 145 |
| Print Setup window..... | 146 |
| Quick Add Guests window..... | 147 |
| Save Stationery Layout window..... | 147 |
| Select Gradient window..... | 148 |
| Select Groups window..... | 148 |
| Select Guests window..... | 149 |
| Shape Properties window..... | 149 |
| Split Columns window | 150 |
| Stationery Layout window..... | 151 |
| Table Order window..... | 153 |
| Table Properties window..... | 153 |
| Text Properties window | 155 |
| Drag and drop..... | 156 |
| Keyboard accelerators..... | 157 |
| Importing | 162 |
| Importing..... | 162 |
| Importing guests from Excel files..... | 163 |
| Importing guests from text and CSV files..... | 163 |
| Importing guests from vCard files..... | 163 |
| Names and titles | 164 |

| | |
|---|------------|
| Names and titles..... | 164 |
| Groups | 165 |
| Groups | 165 |
| RSVP status | 166 |
| RSVP status..... | 166 |
| Meal selection | 167 |
| Meal selection..... | 167 |
| Seat assignment | 171 |
| Seat assignment..... | 171 |
| Automatic seat assignment..... | 173 |
| Genetic algorithm..... | 175 |
| Copying to the clipboard | 177 |
| Copying to the clipboard..... | 177 |
| Printing | 178 |
| Printing | 178 |
| Stationery..... | 180 |
| Emailing | 181 |
| Emailing..... | 181 |
| Exporting | 181 |
| Exporting..... | 181 |
| Export formats..... | 183 |
| Back-up files | 184 |
| Back-up files..... | 184 |
| Creating a good table plan | 185 |
| Creating a good table plan..... | 185 |
| Multiple user access | 185 |
| Mutiple user access..... | 185 |
| Integrating with PerfectTablePlan | 186 |
| Integrating with PerfectTablePlan..... | 186 |
| Command line arguments..... | 187 |
| PerfectTablePlan file format..... | 187 |
| Uninstalling | 193 |
| Uninstalling..... | 193 |
| 3 How do I? | 193 |
| How do I? | 193 |
| Assigning seats | 196 |
| Assign guests to seats..... | 196 |
| Arrange multiple seatings for an event..... | 196 |
| Lock guests to seats..... | 197 |
| Only assign guests who have accepted..... | 198 |
| Charts | 198 |
| Add a chart title/footer..... | 198 |
| Exporting | 199 |
| Choose a format to export to..... | 199 |
| Export a chart to Excel/Word..... | 199 |
| Export guest and seating data to Excel..... | 199 |
| Export to PDF format..... | 200 |
| Floor plan | 201 |
| Add a dance floor, stage etc to the floorplan..... | 201 |
| Add a graphic/image/clip-art to the floor plan..... | 202 |
| Add a title or text into the floor plan..... | 203 |
| Change how guest names are displayed..... | 204 |
| Change how seats are displayed..... | 204 |
| Change the size of the room..... | 205 |

| | |
|---|------------|
| Create a non-rectangular room..... | 205 |
| Create a re-useable floor plan template..... | 207 |
| Handle multiple rooms..... | 207 |
| Show gender..... | 208 |
| Show groups..... | 209 |
| Show meals..... | 210 |
| Show unassigned seats..... | 210 |
| Show VIP/Special/RSVP/locked..... | 211 |
| Turn the floor plan grid on/off..... | 212 |
| Use an image of the venue..... | 212 |
| Zoom in/out of the floor/table plan..... | 213 |
| Groups | 214 |
| Insert a new guest into an existing group..... | 214 |
| Move guests from one group to another..... | 214 |
| Guests | 214 |
| Add custom fields..... | 214 |
| Add or remove dots at the end of titles..... | 215 |
| Copy guests from one plan to another..... | 216 |
| Customise standard guest titles..... | 216 |
| Handle guests with unknown names..... | 217 |
| Handle post-nominal titles..... | 218 |
| Set the RSVP status for multiple guests..... | 218 |
| Track details of non-seated guests..... | 219 |
| Turn on/off guest name capitalisation..... | 219 |
| Importing | 219 |
| Import guest details from Apple Address Book..... | 219 |
| Import guest details from Excel spreadsheets..... | 220 |
| Import guest details from Outlook..... | 220 |
| Import guest details from Outlook Express..... | 220 |
| Import guests in couples/families/groups..... | 220 |
| Import seating data..... | 220 |
| Plans | 222 |
| Email my plan..... | 222 |
| Retrieve old versions of the plan..... | 222 |
| Printing | 222 |
| Change the printer paper size..... | 222 |
| Change the print pagination..... | 223 |
| Print a guest list..... | 223 |
| Print legible plans on a small format printer..... | 223 |
| Print to poster size..... | 224 |
| Proximity | 225 |
| Change proximity for multiple guests..... | 225 |
| Show the proximity for one group at a time..... | 225 |
| Stationery | 225 |
| Add a graphic/image/clip-art to the stationery..... | 225 |
| Add a new stationery layout..... | 227 |
| Create address labels..... | 227 |
| Load sample stationery..... | 228 |
| Order place cards..... | 229 |
| Print place cards, invitations, address labels etc..... | 229 |
| Remove stationery border or foldline..... | 229 |
| Tables | 230 |
| Change table size or shape..... | 230 |
| Change the table order..... | 230 |

| | |
|--|----------------|
| Create an E-shaped table | 231 |
| Rename a table..... | 232 |
| Other | 232 |
| Change fonts and/or colours..... | 232 |
| Change text inside panes..... | 232 |
| Estimate numbers and budget..... | 233 |
| Liaise with caterers..... | 233 |
| Select multiple items..... | 234 |
| 4 Frequently asked questions..... | 234 |
| Frequently asked questions | 234 |
| 5 Licensing | 234 |
| Licensing | 234 |
| 6 Support | 235 |
| Contact support | 235 |
| Report a bug | 235 |
| Request an enhancement | 236 |
| 7 Updates | 236 |
| Updates | 236 |
| Newsletter | 237 |
| Index | 238 |

1 Getting started

1.1 Introduction

1.1.1 Introduction

PerfectTablePlan v4.1.0 for Mac OS X

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 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.


1.1.2 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.

1.1.3 System requirements

The suggested requirements for running this software are:

| | |
|-------------------|---------------------------|
| Operating system | Mac OS X 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.

1.1.4 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 Mac OS X 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>What's 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**.

1.2 Quick start guide

1.2.1 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. [Decide who should sit near \(or not near\) whom.](#)
3. [Add tables.](#)
4. [Assign guests to seats.](#)
5. [Output 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 |
|----------|--|
| Anon | Check this if you don't know the guest's name yet. |

| | |
|---------------------|---|
| 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 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. You can also add [custom properties](#) in the [Advanced and Professional editions](#) of PerfectTablePlan.



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>**  **Quick Add Guests** 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. Decide who should sit near whom


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 this 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). 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 the **Insert** menu, e.g. **Insert>** **Circular Table**, or the equivalent **Insert** tool bar button. The types of table are:

| Table | Icon | Meaning |
|---------------|---|---|
| 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 or banquet. |
| Custom |  | A rectangular or square table with potentially different numbers of seats on each of the 4 sides. |
| Circular |  | A circular table with seats all around it. |
| Semi-circular |  | A semi-circular table with seats around the straight side and/or curved sides. |
| Oval |  | An elliptical table with seats all around it. |
| Row of seats |  | A row of seats (no table). |

Each table has the following properties:

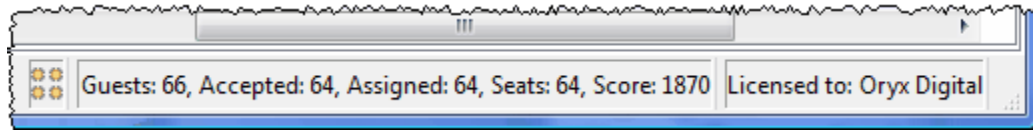
| Property | Meaning |
|---------------|--|
| Name | The name displayed for the table. The default name is "Table 1" , "Table 2" etc, but you can set any name. |
| Shape | See above. |
| Angle | The rotation angle of the table in the 🪴 Floor Plan and 🪴 Table Plan panes. |
| Colour | The colour of the table in the 🪴 Floor Plan and 🪴 Table Plan panes. This overrides any colour set for the pane. |
| Seats | The number of seats for the table. |
| Size | 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). |
| VIP | Check the box to designate a VIP table. The automatic seat assignment attempts to assign VIP guests to VIP tables. |
| Notes | 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 dragging the background (the cursor will change to a hand) or clicking on the scroll bars. 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. You can also add [images](#) in the [Advanced and Professional editions](#) of PerfectTablePlan.

Rotate a table, shape or text 45 degrees clockwise 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**.

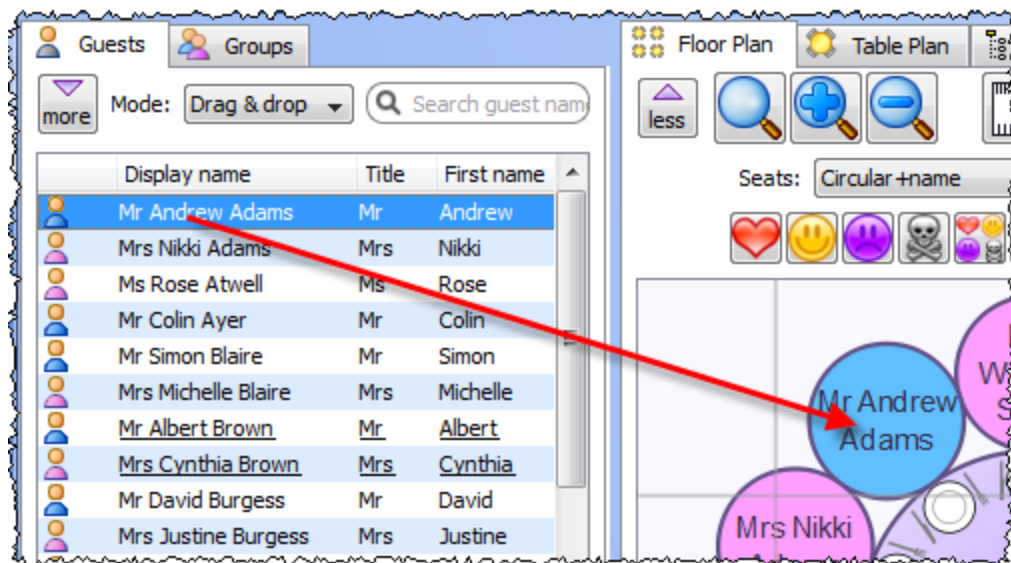


4. Assign guests to seats

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 should 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 **File>Auto Assign Seats** 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  **Report** pane to see a report 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. Output

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  **Report** panes


using **File>** **Print** or the equivalent **Main** tool bar button.

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 order a digital poster print or place cards using **File>** **Order Posters and Cards**.

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  **Report** panes into the clipboard using **Edit>** **Copy**.

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](#)

[How do I?](#)

1.3 Movies

1.3.1 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.

1.4 Tutorial

1.4.1 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 >>](#)

1.4.2 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.

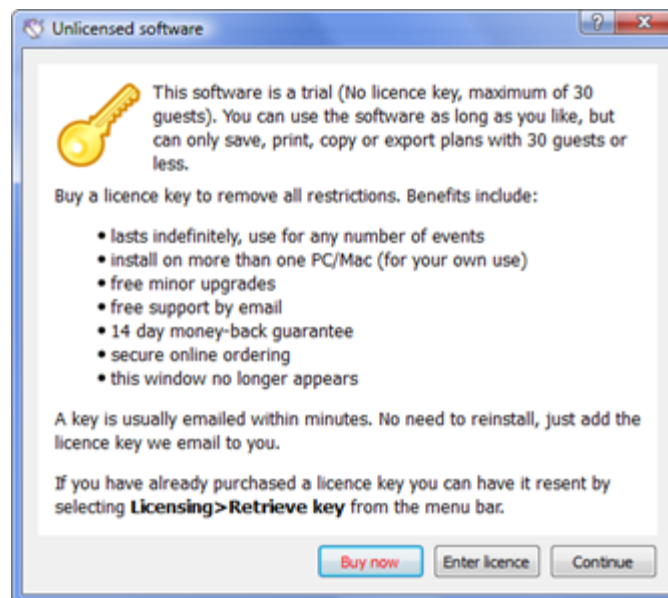
Double click on the  PerfectTablePlan icon in the **Applications** folder (or wherever you copied it to)

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.

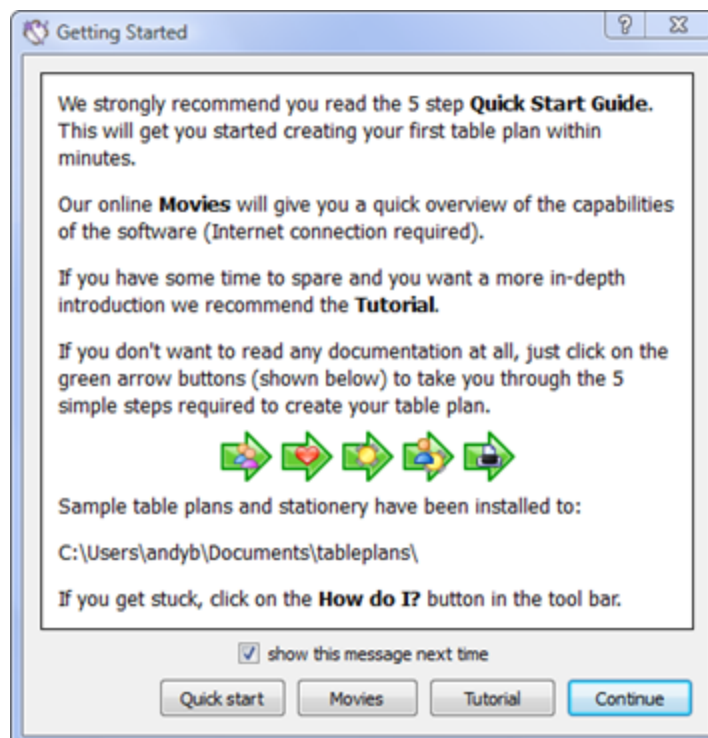
Warning The PDF help is nearly 200 pages!

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



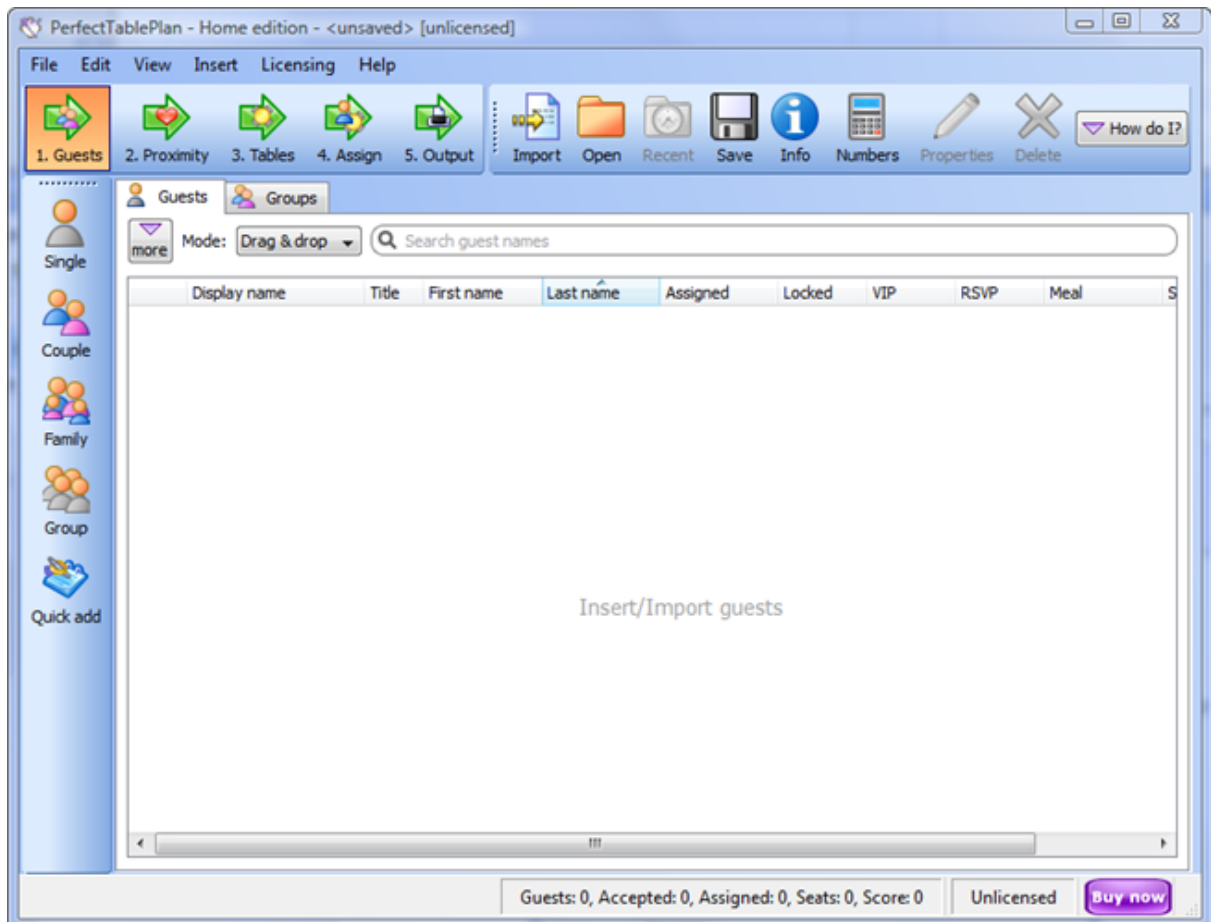
If you have a [licence key](#) you can enter it now, however you can complete the tutorial without it. Click the **Continue** button.

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



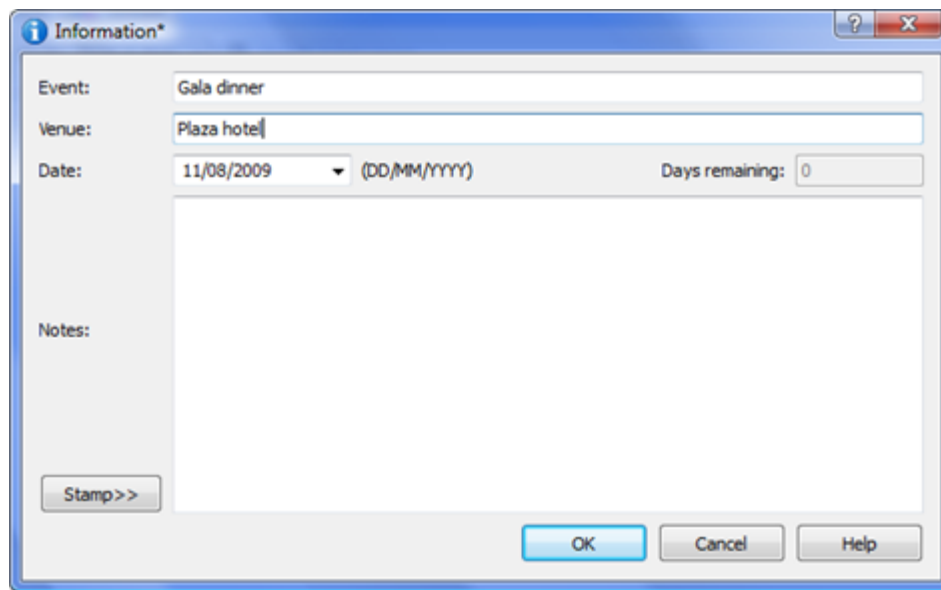
If you don't want to see it again uncheck the **show this message next time** check

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.




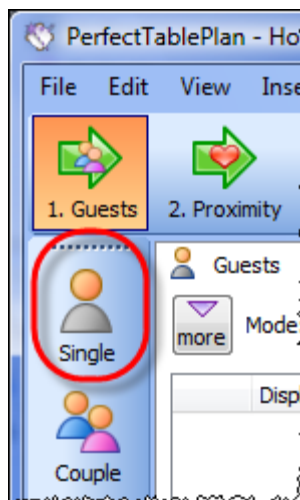
Next: [2. Add guests >>](#)

1.4.3 2. Add guests

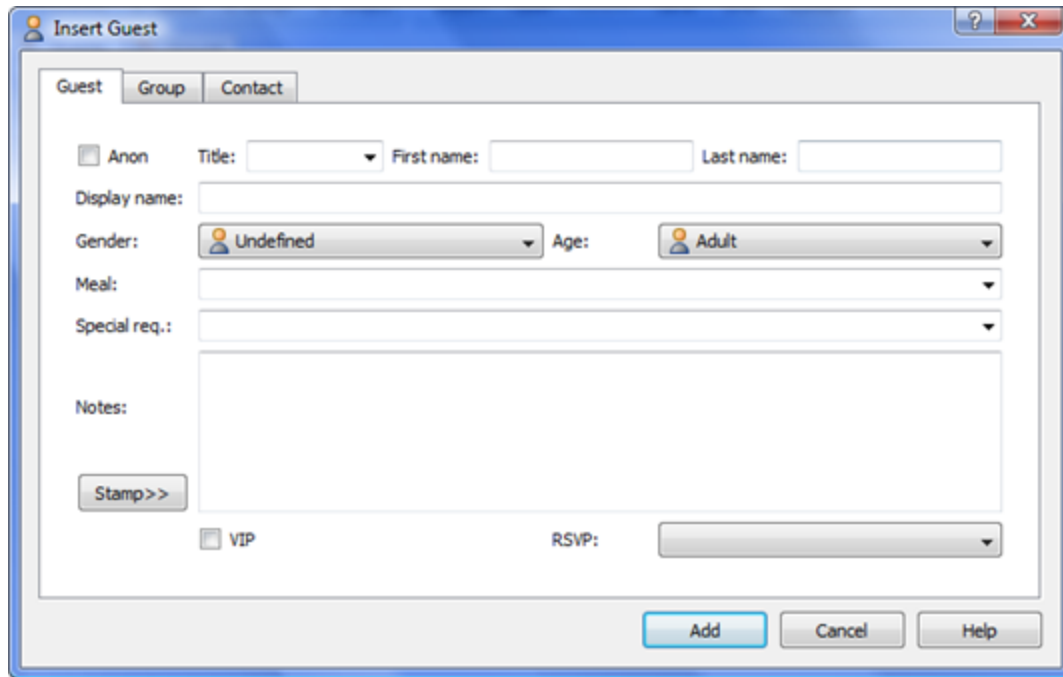
Note You can also view this tutorial as a movie [on our website](#).

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.



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`.

Insert Guest*

Guest Group Contact

☐ Anon Title: Mr First name: John Last name: Smith

Display name: Mr John Smith

Gender: Male Age: Adult

Meal:

Special req.:

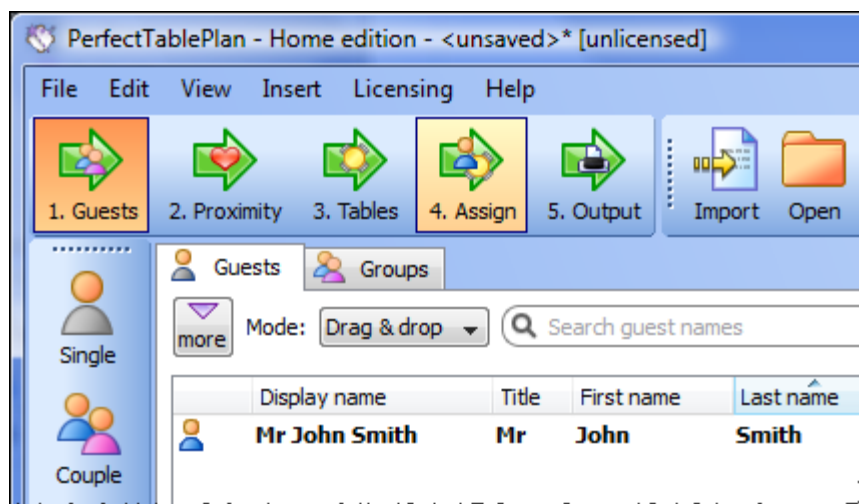
Notes:

Stamp>>

☐ VIP RSVP:

Add Cancel Help

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:

Insert Couple*

Guests | Group | Contact

☐ Anon Title: Mr First name: Joe Last name: Bloggs

Display name: Mr Joe Bloggs

Gender: Male Age: Adult

Meal:

Special req.:

Notes:

Stamp>>

☒ VIP RSVP:

☐ Anon Title: Mrs First name: Last name: Bloggs

Display name: Mrs Bloggs

Gender: Female Age: Adult

Meal:

Special req.:

Notes:




Stamp>>



☐ VIP RSVP:

Add Cancel Help

Now 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 for the couple.

| Proximity | |
|--------------|---|
| more | Display: Last, First |
| 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 Willian Jones | Mr | Willian | Jones |
| | Mrs Nicola Jones | Mrs | Nicola | Jones |
| | Master Jason Jones | Master | 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.

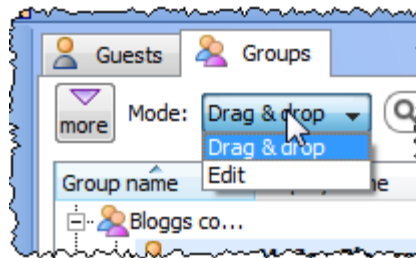
Click on **Display name**, **Title** and other column headers to sort the guests.

Click on the **Groups** tab.

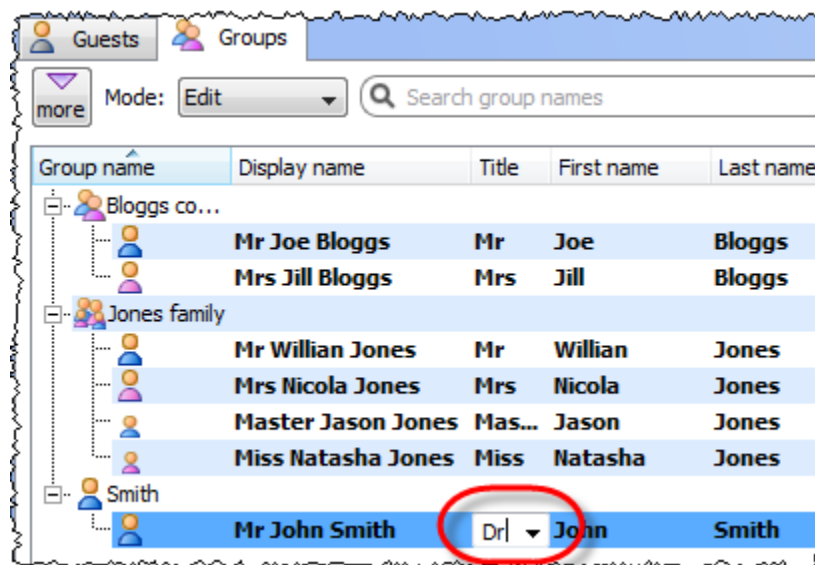
| Group name | Display name | Title | First name | Last name |
|--------------|---------------------------|---------------|----------------|---------------|
| Bloggs co... | Mr Joe Bloggs | Mr | Joe | Bloggs |
| | Mrs Jill Bloggs | Mrs | Jill | Bloggs |
| Jones family | Mr Willian Jones | Mr | Willian | Jones |
| | Mrs Nicola Jones | Mrs | Nicola | Jones |
| | Master Jason Jones | Mas... | Jason | Jones |
| | Miss Natasha Jones | Miss | Natasha | Jones |
| Smith | Mr John Smith | 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.

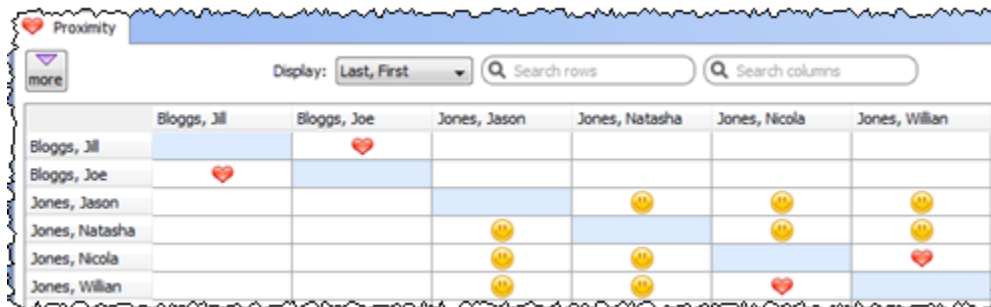
Next: [3. Set proximity >>](#)

1.4.4 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 to show the  **Proximity** pane:

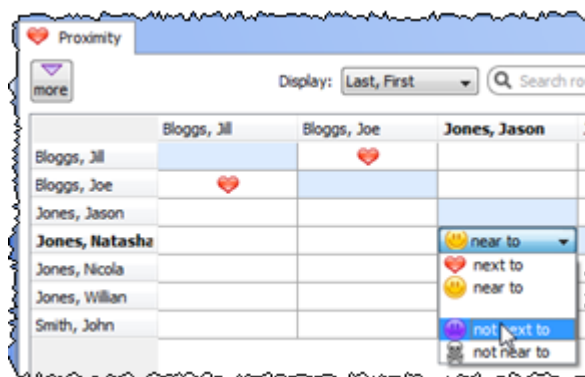


The screenshot shows the Proximity pane with a table of guest names. The table has columns for Bloggs, Jill; Bloggs, Joe; Jones, Jason; Jones, Natasha; Jones, Nicola; and Jones, Willian. The rows are the same. The table is symmetric. Red hearts indicate high priority proximity, and yellow smiley faces indicate lower priority proximity.

| | Bloggs, Jill | Bloggs, Joe | Jones, Jason | Jones, Natasha | Jones, Nicola | Jones, Willian |
|----------------|--------------|-------------|--------------|----------------|---------------|----------------|
| Bloggs, Jill | | ❤️ | | | | |
| Bloggs, Joe | ❤️ | | | | | |
| Jones, Jason | | | | 😊 | 😊 | 😊 |
| Jones, Natasha | | | 😊 | | 😊 | 😊 |
| Jones, Nicola | | | 😊 | 😊 | | ❤️ |
| Jones, Willian | | | 😊 | 😊 | ❤️ | |

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**.



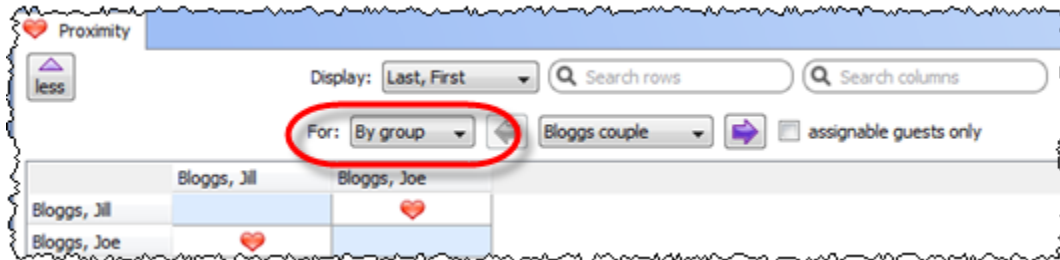
The screenshot shows the Proximity pane with the same table as before. The cell where Jason and Natasha intersect is selected, and a dropdown menu is open. The dropdown menu has the following options: near to, next to, near to, not next to, and not near to. The 'not next to' option is highlighted.

| | Bloggs, Jill | Bloggs, Joe | Jones, Jason |
|----------------|--------------|-------------|---------------|
| Bloggs, Jill | | ❤️ | |
| Bloggs, Joe | ❤️ | | |
| Jones, Jason | | | |
| Jones, Natasha | | | 👎 near to |
| Jones, Nicola | | | ❤️ next to |
| Jones, Willian | | | 😊 near to |
| Smith, John | | | 👎 not next to |

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 For drop-down list. The ❤️Proximity pane now shows just one group at a time.



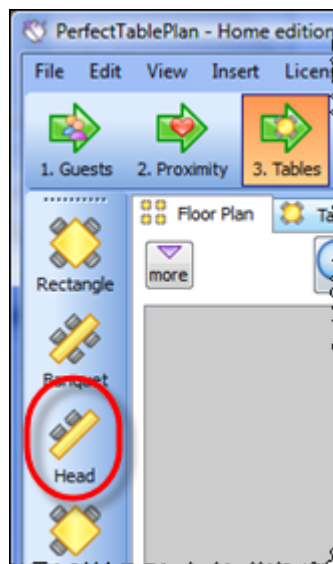
The proximity will become important when we start assigning guests to seats.

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

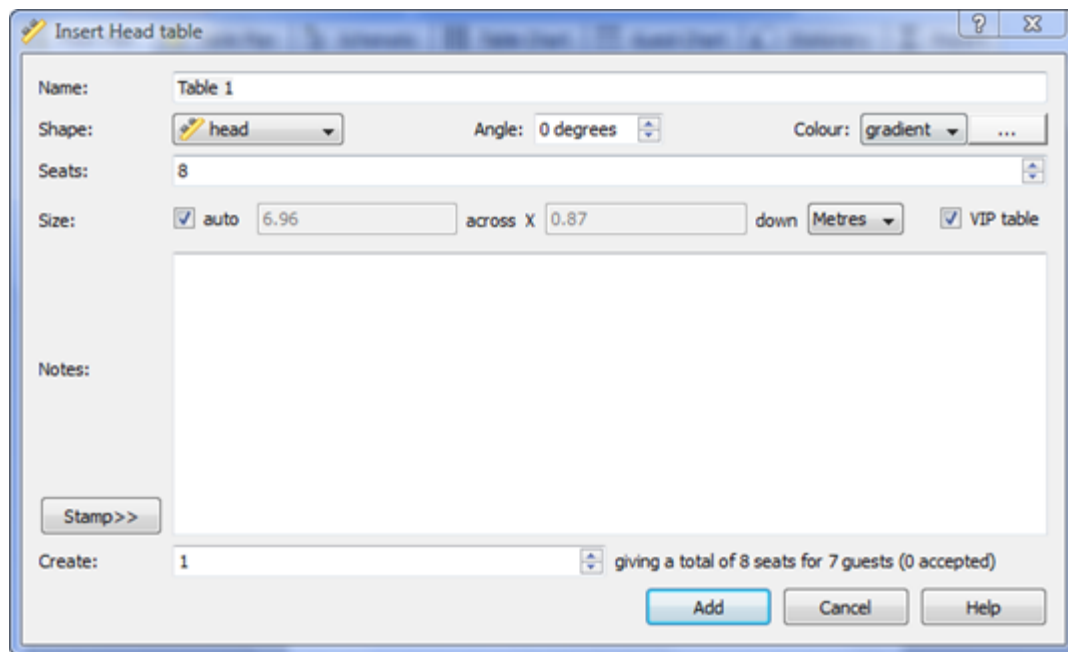
1.4.5 4. Add tables

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

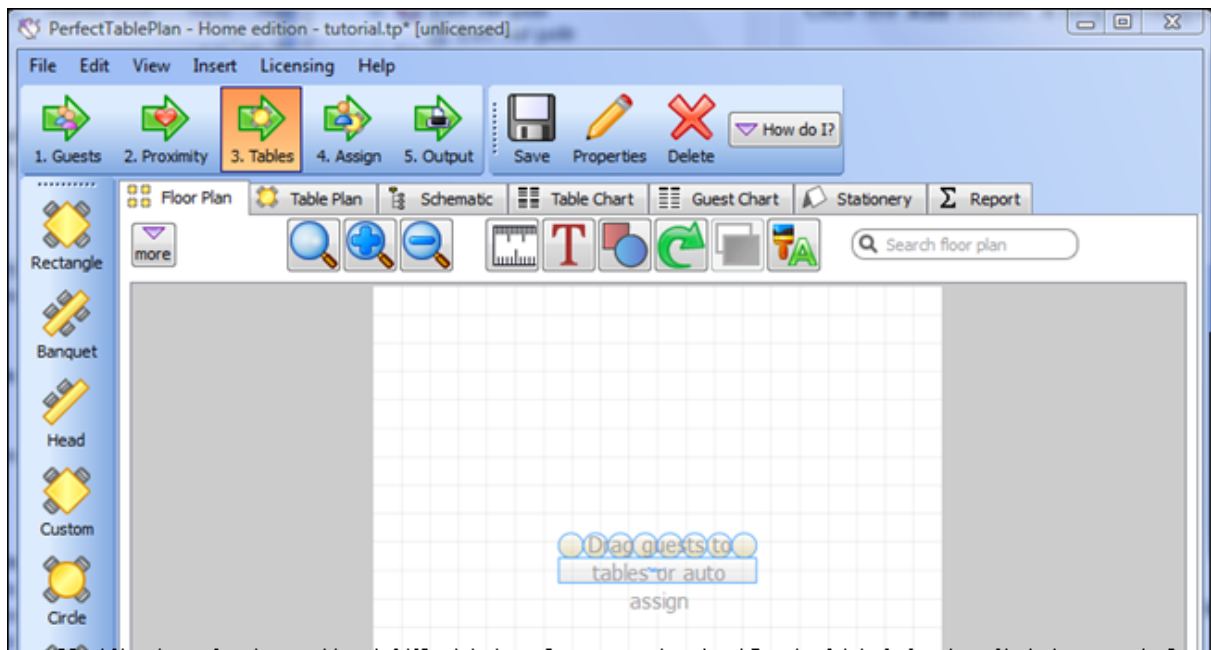
The next step to creating your table plan is to add some tables for the guests to sit at. Click on the ➡️3.Tables button in the Task tool bar. Click on the 🪵Insert Head Table button in the Insert tool bar.



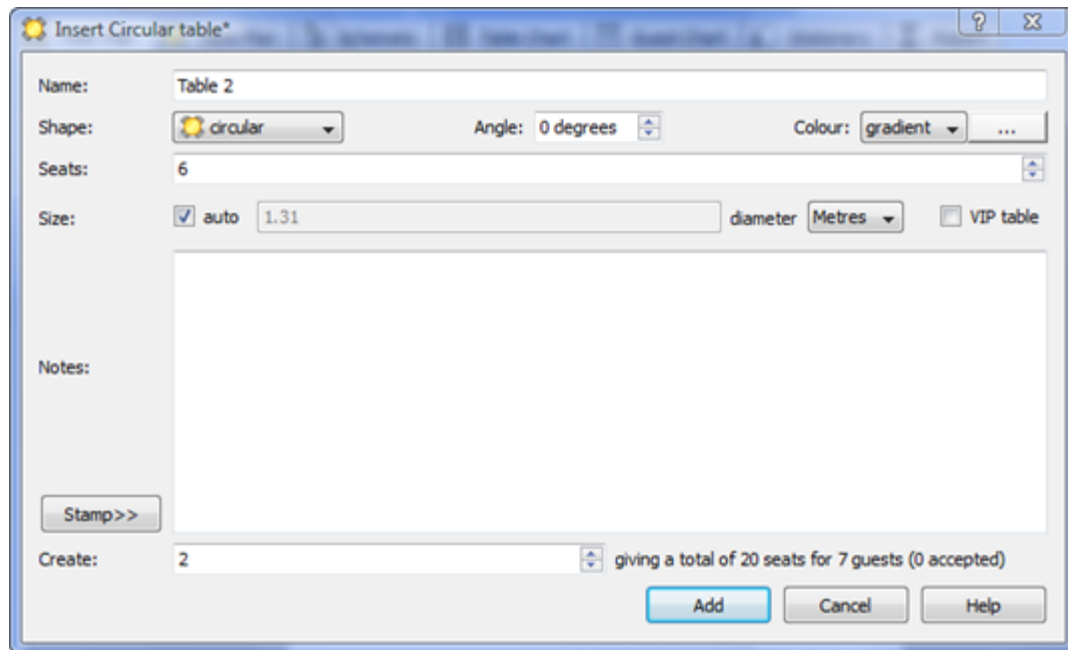
The 🪵Insert Head Table window will appear.




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.

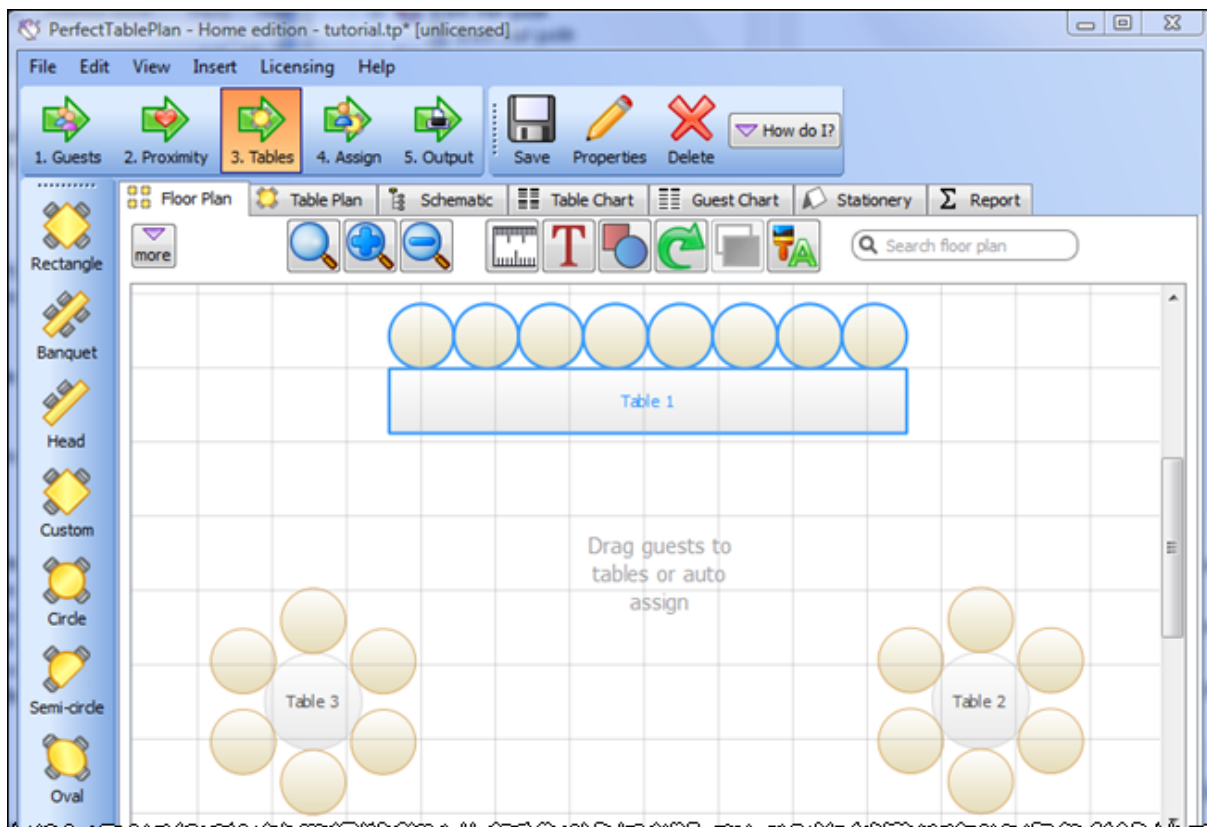




Leave the **auto** box checked to allow PerfectTablePlan to set a table size based on the number of seats and the **Seat width** set in the  **Dimensions** window.


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).

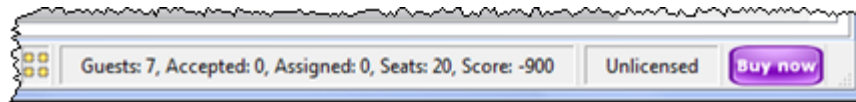
You can change the size of the floor plan using the  button. This allows you to enter the dimensions of the venue in which the event will take place.


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

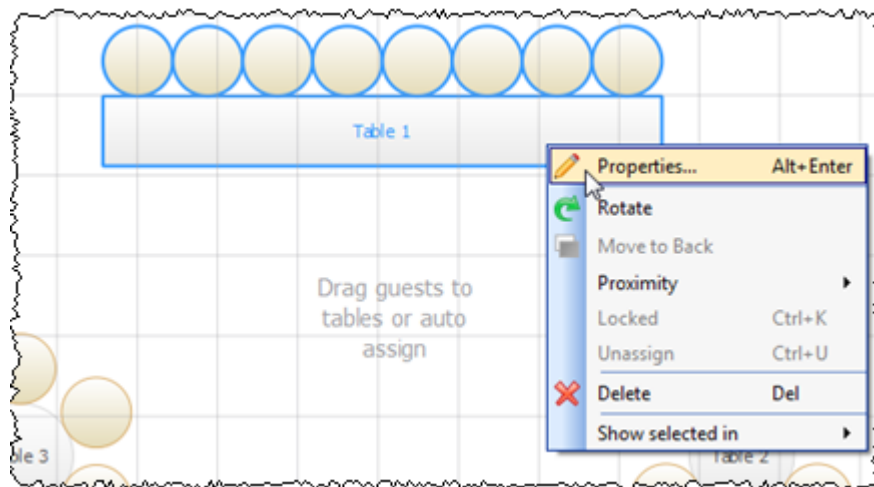
You can change the colours and fonts in the floor plan by clicking the  button at the top of the pane.

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 >>](#)

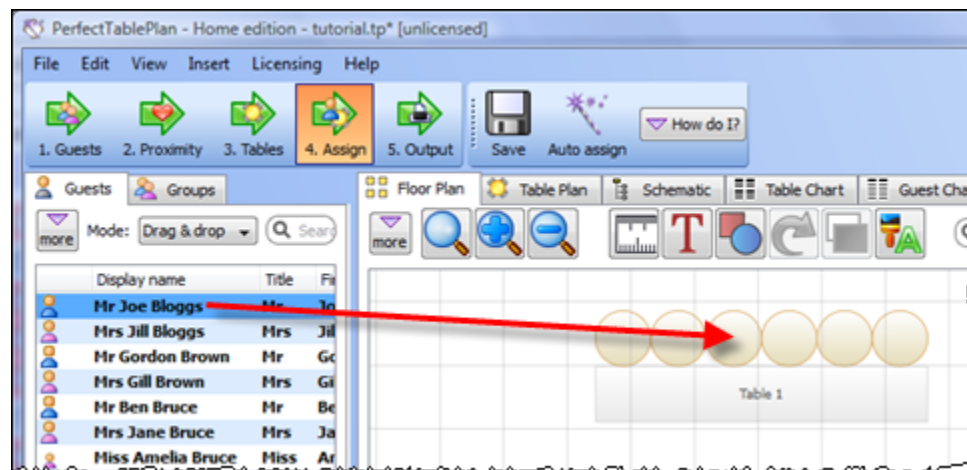
1.4.6 5. Assign guests

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

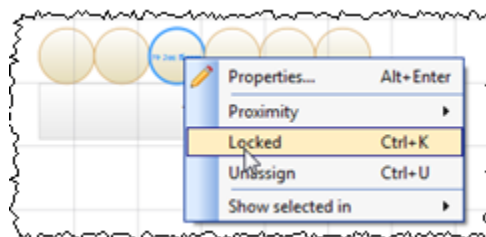
The next step is to assign guests to seats. Click on the  **4.Assign** button in the **Task** tool bar.


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**.

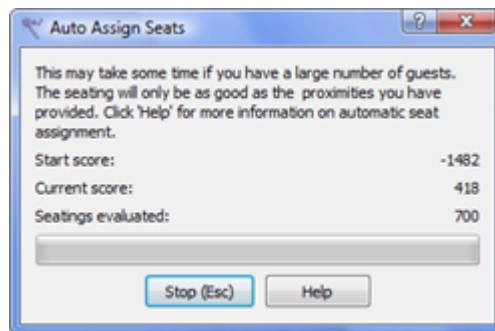



A locked guest cannot be re-assigned until they have been unlocked. This is particularly useful for stopping the  **Auto seat assign** from moving guests who you wish to remain in their assigned seat. You can also select a table and lock all the guests on it.

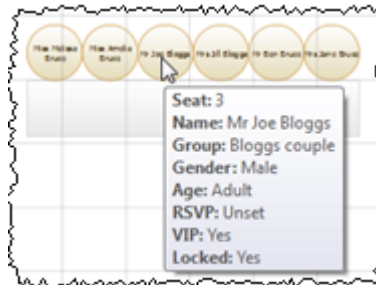
Drag Mrs Jill Bloggs to the next seat to Mr Joe Bloggs and lock her, in the same way. Note that locked guest appear underlined in the  **Guests** and  **Groups** panes.



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 >>](#)


1.4.7 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:

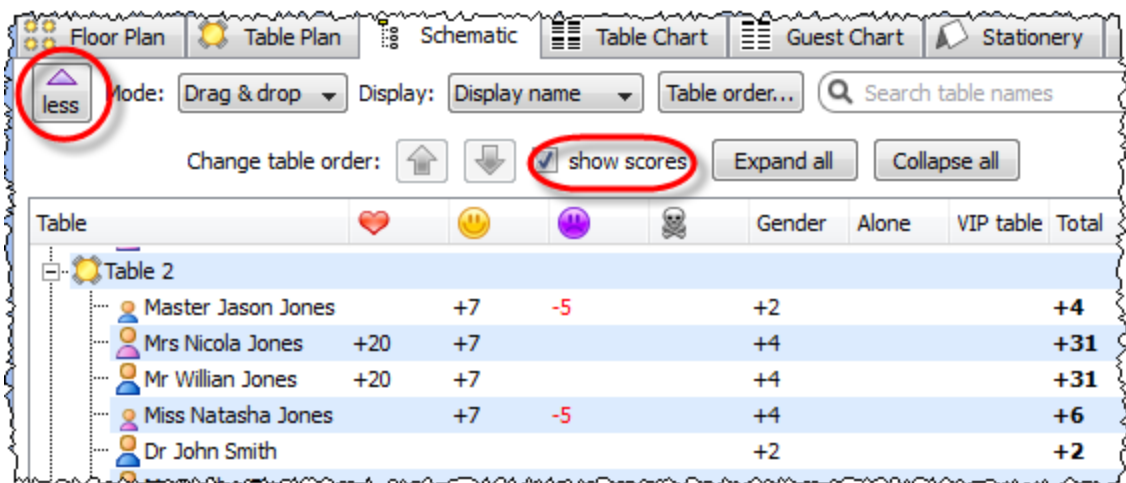
+5 for being next to Mrs Nicola Jones with  proximity

+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

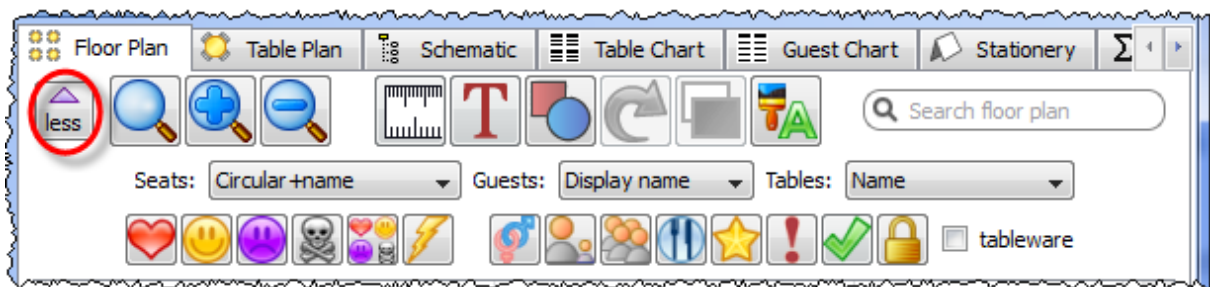
= +4 total



✎ **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 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.

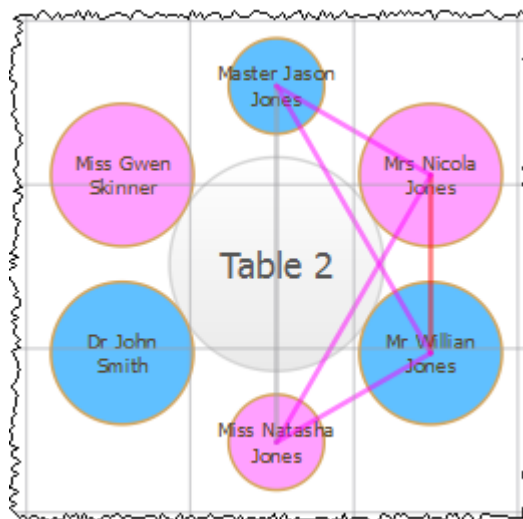
Depress the ⭐ button to show guest and table VIP status (shown with stars).

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

Depress the ✅ button to show guest RSVP status.

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


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  **Report** 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](#)

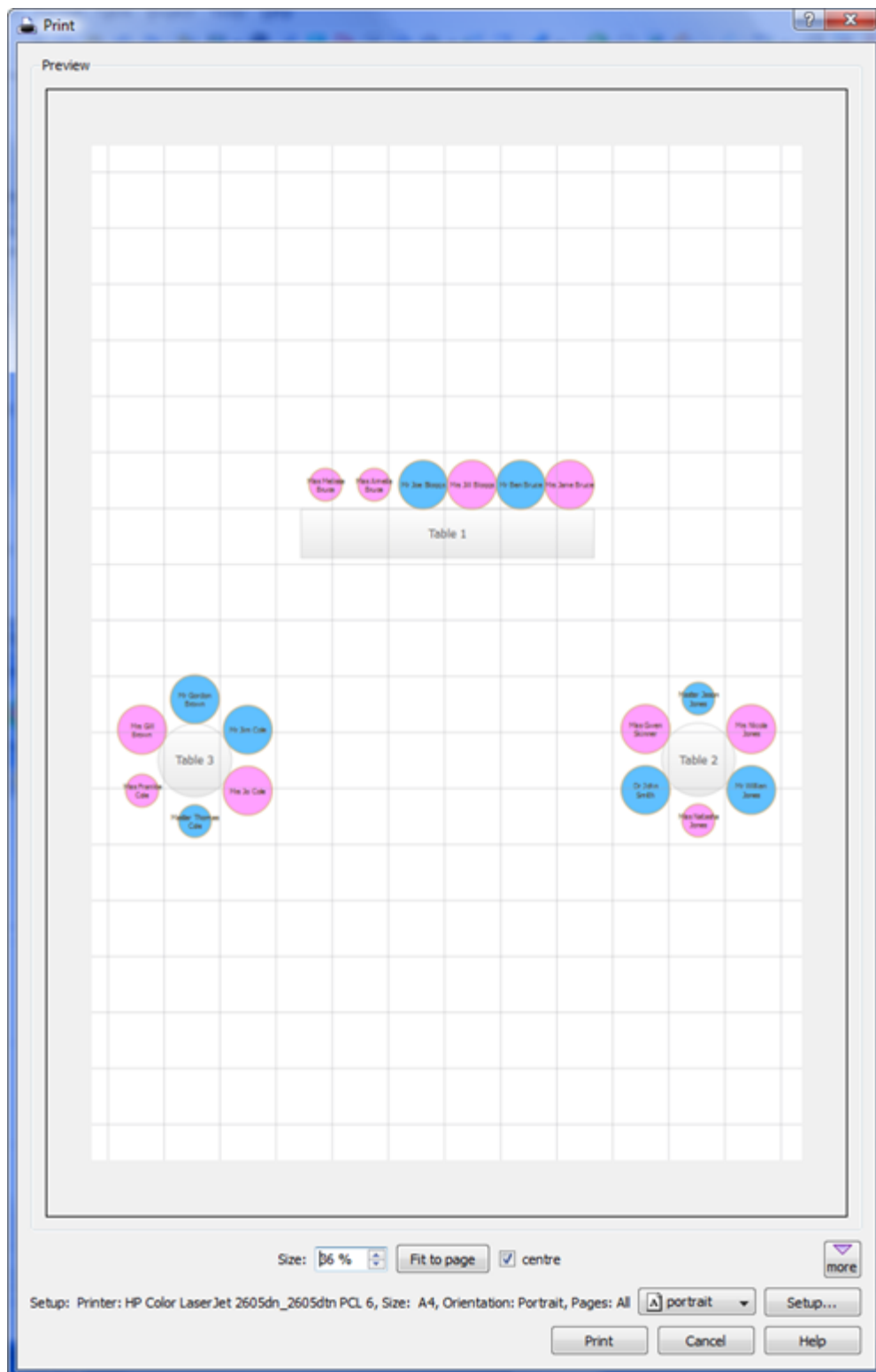
Next: [7. Print plan >>](#)

1.4.8 7. Print plan

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

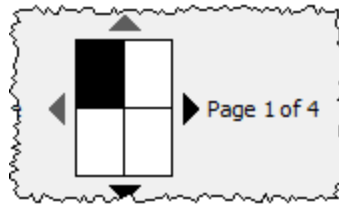
The next step is to print and/or export your table plan. Click on the  **5.Output** button in the **Task** tool bar.

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 📈**Report** pane for an overview of numbers at your event.

Note You can also [order digital prints online](#).


You can copy the contents of the 🍷**Floor Plan**, 🍷**Table Plan**, 📊**Table Chart**, 📊**Guest Chart** or 📈**Report** panes into the clipboard using **Edit>📋Copy**.



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.

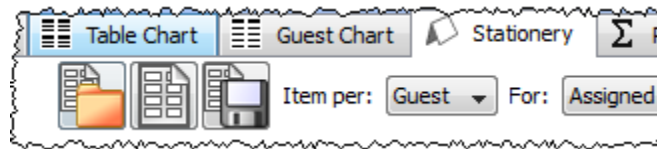
Next: [8. Print stationery >>](#)

1.4.9 8. Print stationery

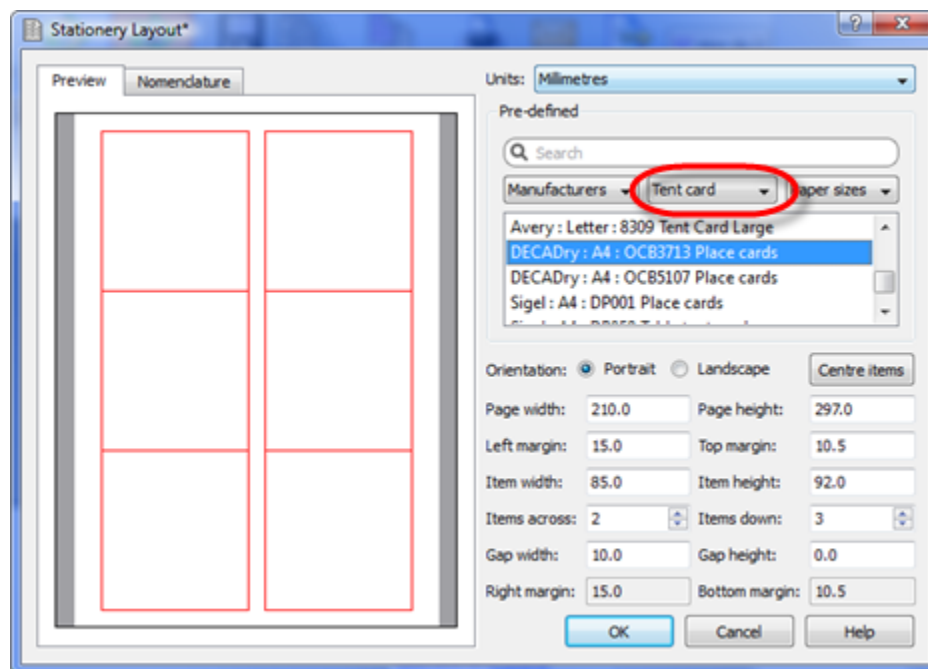
Note You can also view this tutorial as a movie [on our website](#).


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.

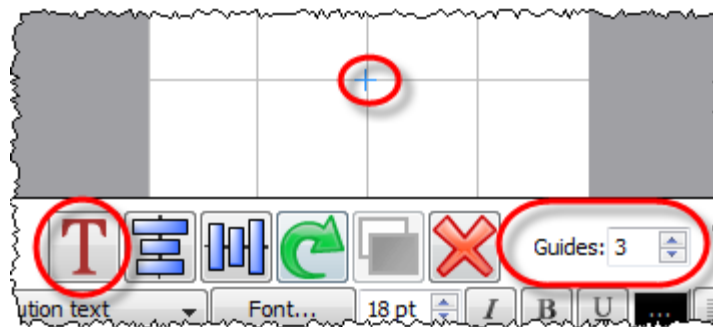
Bring the  **Stationery** pane to the front. Click on the  **Stationery layout** button.



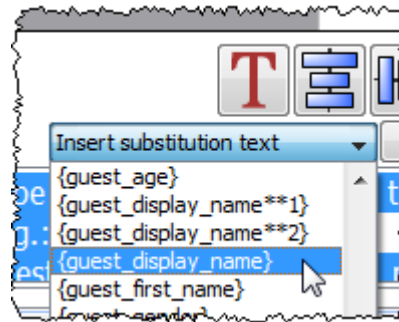
The **Stationery Layout** window will appear. From the filters select **Tent card** and then click on the **DecaDry** place cards. Click **OK**.



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**.

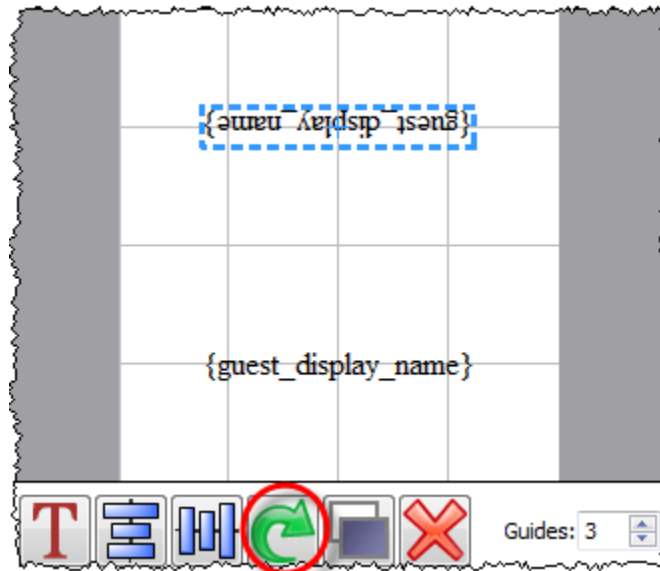



Click the **T Add text** button again. The cursor will change to a crosshair. Click on the top centre of the place card (as shown below).

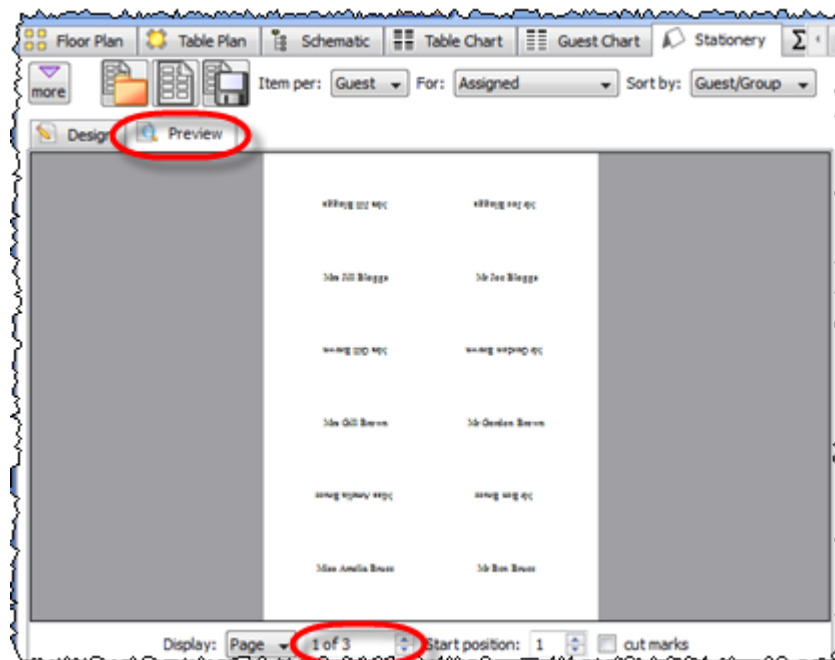


We want the text to be displayed on both sides of the folded tent cards. Select


{guest_display_name} from **Insert substitution text**. Click on the  **Rotate** button twice.

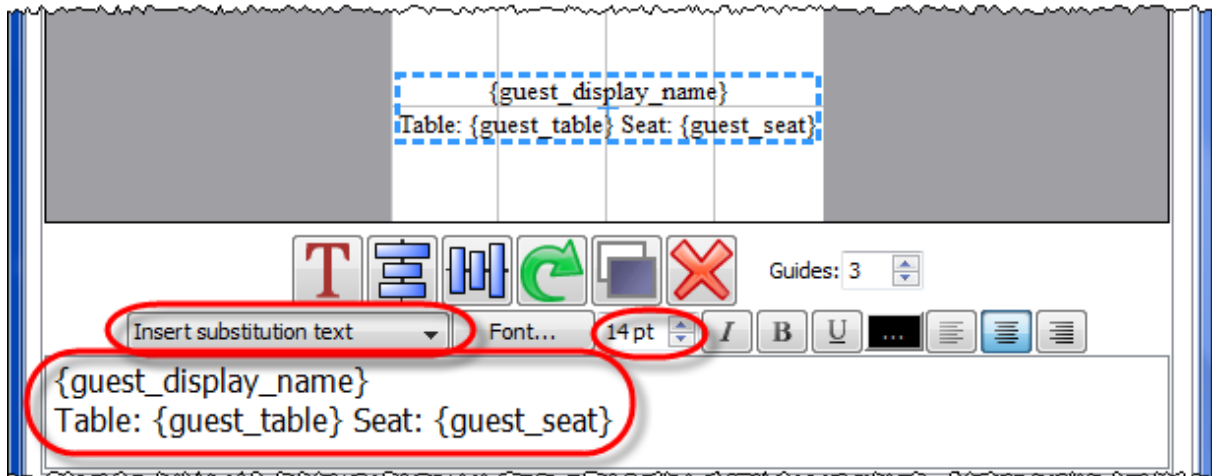


Click on the  **Preview** tab to preview how the place cards will be printed. Notice that the text inside the curly brackets has been substituted by guest display names. Change the page number to see what each page will look like.




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.

Select **File** >  **Print** to print the stationery.

Note You can [order place cards online](#).

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 >>](#)

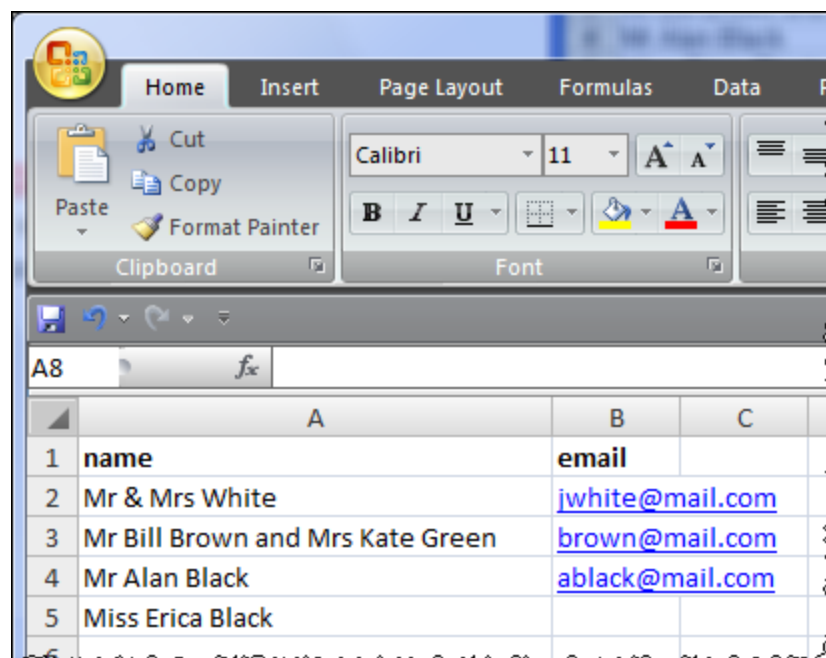
1.4.10 9. Import guests

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 an Excel spreadsheet with the following data:

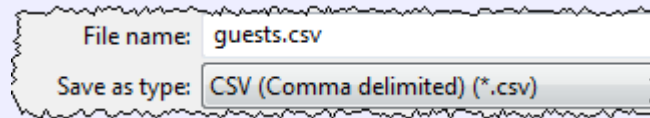
| | A | B | C |
|---|----------------------------------|--|---|
| 1 | name | email | |
| 2 | Mr & Mrs White | jwhite@mail.com | |
| 3 | Mr Bill Brown and Mrs Kate Green | brown@mail.com | |
| 4 | Mr Alan Black | ablack@mail.com | |
| 5 | Miss Erica Black | | |

PerfectTablePlan for Mac OS X can't read Excel binary files, so you need to save your spreadsheet into a .csv (comma separate value) file that PerfectTablePlan can read.


Creating a .csv file in Excel

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

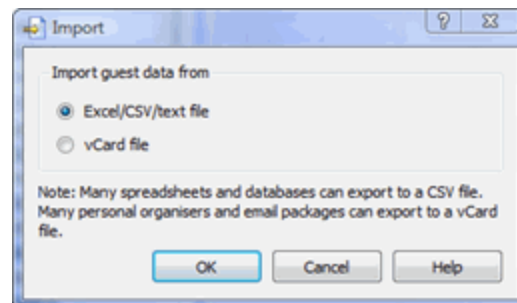
format.



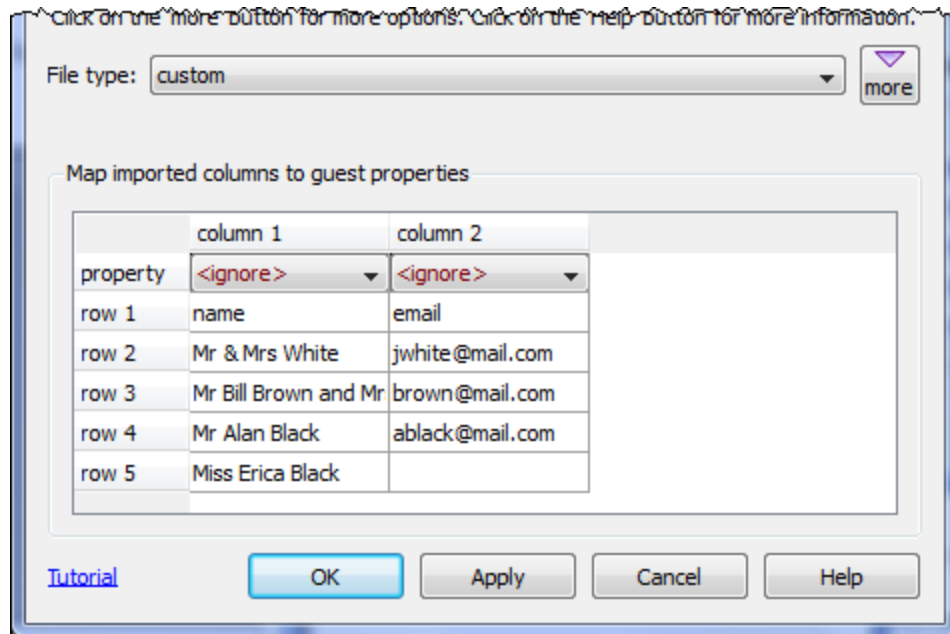
The data is now in a format PerfectTablePlan can read.


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

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



Ensure **CSV/text 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.



Click the  button and tell PerfectTablePlan which columns correspond to which guest properties and to ignore the first row, as shown below.

Import Data*

File type: custom

Import file

Location: C:\Users\andyb\Desktop\guests.xlsx Worksheet: Sheet1 Browse...

Ignore first: 1 (header) rows

Format: Excel

☐ group consecutive guests with same last name ☐ single guest per row

Proximity for guests in same group: near to

Map imported columns to guest properties

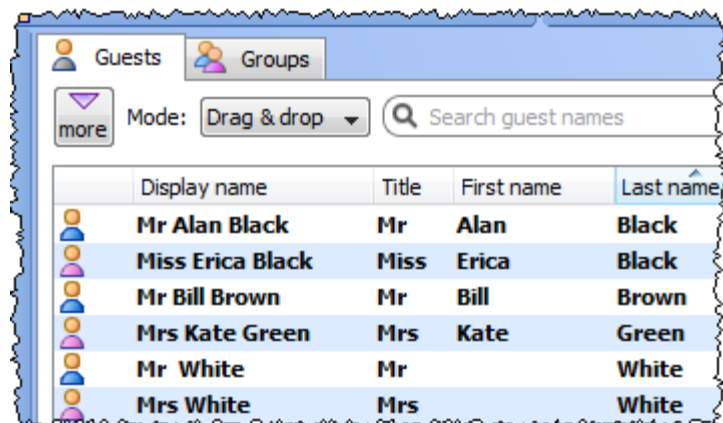
| | column 1 | column 2 |
|----------|----------------------|-----------------|
| property | Last name(s) | Email |
| row 1 | Mr & Mrs White | jwhite@mail.com |
| row 2 | Mr Bill Brown and Mr | brown@mail.com |
| row 3 | Mr Alan Black | ablack@mail.com |
| row 4 | Miss Erica Black | |

Add row Delete row(s) Add column Split column(s)... Join columns... Delete column(s)

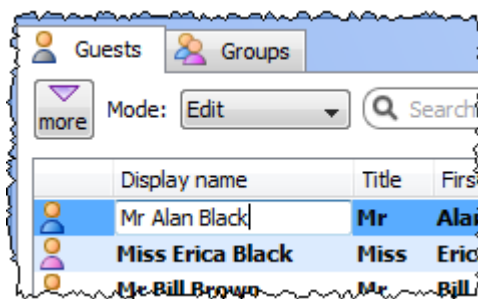
[Tutorial](#) OK Apply Cancel Help

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.

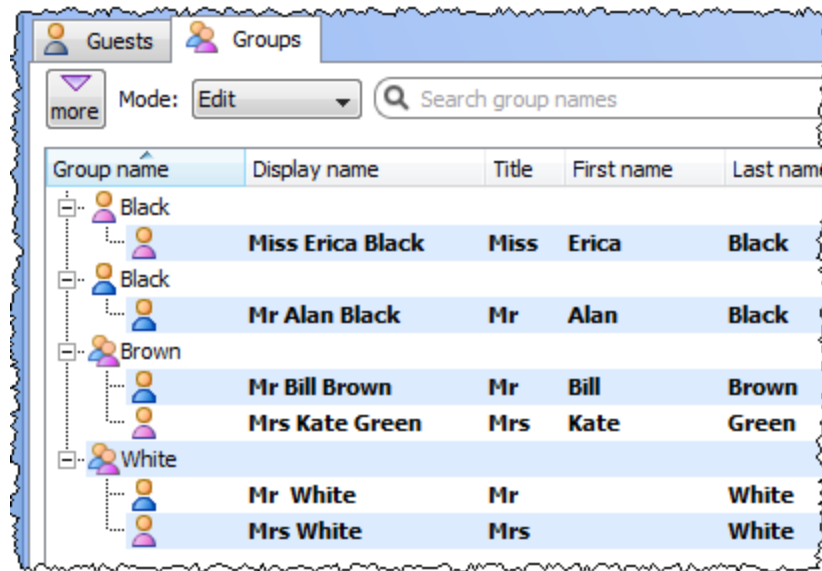


PerfectTablePlan has used [title preferences](#) to extract titles and guess age and gender. If it has guessed anything wrong you can easily change it in **Edit** mode or **Edit>Undo** the changes.



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

It has also placed guests into groups.

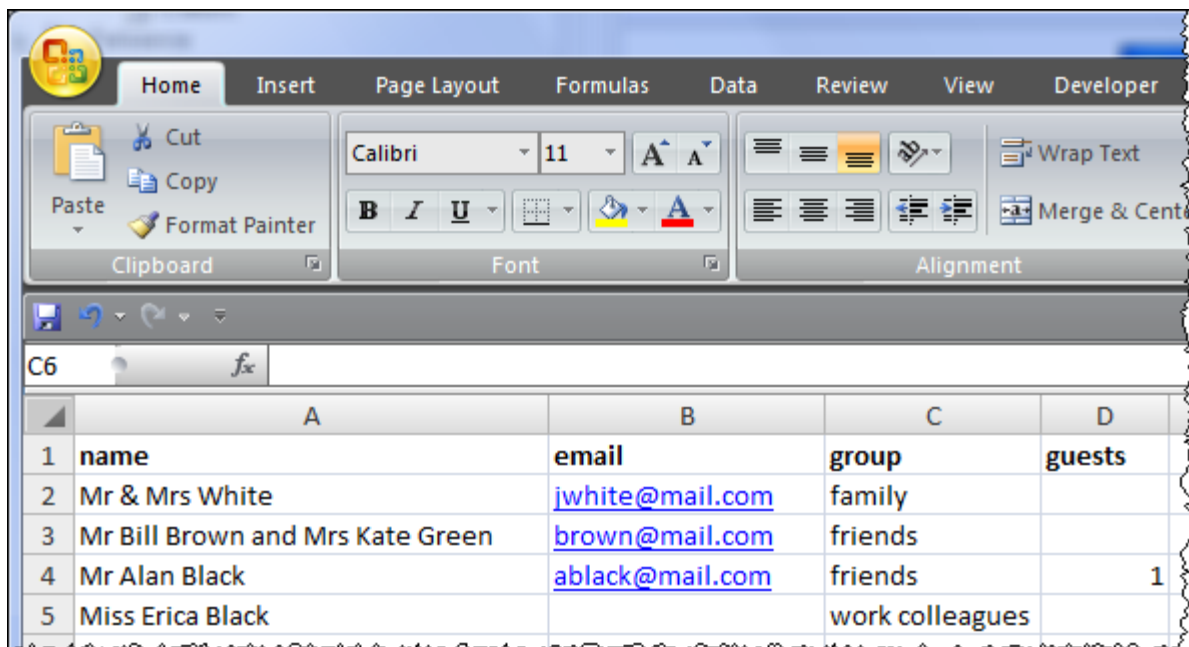


If you don't like how they have been grouped you can easily drag guests between groups in **Drag and drop** mode in the **Groups** pane. Note that you could have placed Mr Alan Black and Miss Erica Black in the same group by checking **group consecutive guests with the same name** in the **Import** window.

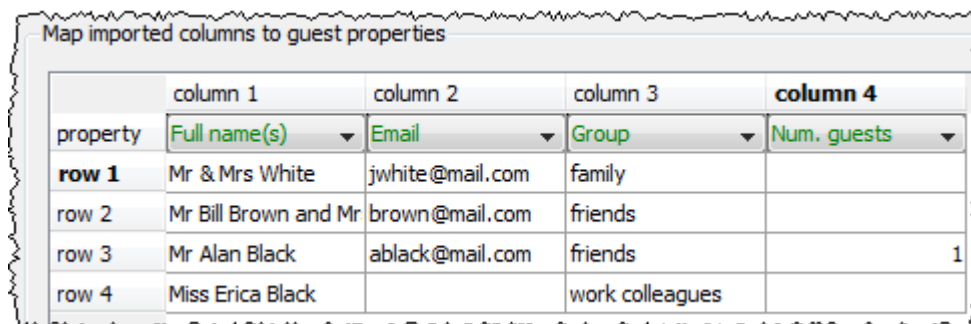
If you look in the **Proximity** pane you will see it has set proximity for the guests in each group.

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

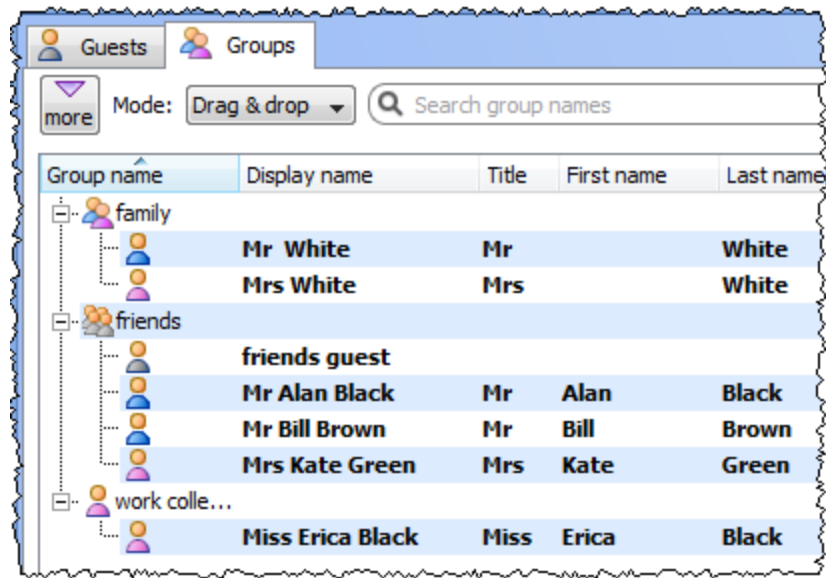
Select **File** > **New** to clear the current plan. Click on **Don't save**. Add an additional group column and guest column to your spreadsheet, as below.



Save and re-import the new spreadsheet into PerfectTablePlan (as above). Select the property drop-down lists as shown below.



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

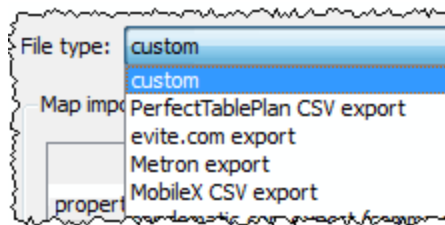




The screenshot shows the PerfectTablePlan interface with a 'Groups' tab selected. It features a search bar, a 'Mode: Drag & drop' dropdown, and a table of groups and guests.

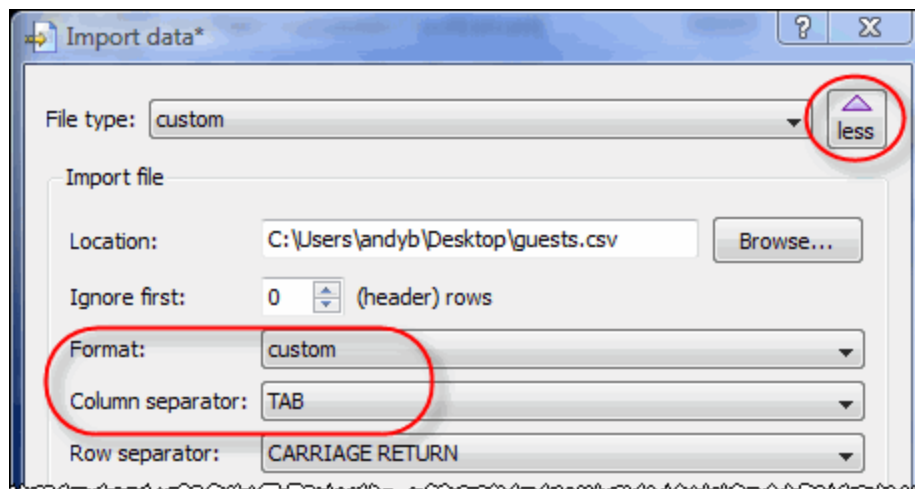
| Group name | Display name | Title | First name | Last name |
|---------------|------------------|-------|------------|-----------|
| family | | | | |
| | Mr White | Mr | | White |
| | Mrs White | Mrs | | White |
| friends | | | | |
| | friends guest | | | |
| | Mr Alan Black | Mr | Alan | Black |
| | 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 if 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) [Quick Add Guests 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?](#)

1.5 Editions

1.5.1 Editions

The table below summarises the differences between the 3 PerfectTablePlan Editions. You can switch between editions in the **Editions** tab of the  [Preferences window](#). If you switch to an edition you don't have a licence for you

will be in trial mode (no saving, printing or exporting of plans with >30 guests).

| | Edition | | |
|------------------------------------|--|--|------------------------------------|
| | Home | Advanced | Professional |
| Typical users | <i>People organizing their own wedding reception, party or bar/bat mitzvah</i> | <i>Charity organizers, club secretaries and other frequent users</i> | <i>Professional event planners</i> |
| Event size | Unlimited | Unlimited | Unlimited |
| Number of events | Unlimited | Unlimited | Unlimited |
| Duration of licence | Unlimited | Unlimited | Unlimited |
| Free support by email | ✓ | ✓ | ✓ |
| 14-day money back guarantee | ✓ | ✓ | ✓ |
| Add images to floor plan | ✗ | ✓ | ✓ |
| Add background image to floor plan | ✗ | ✓ | ✓ |
| Add images to stationery | ✗ | ✓ | ✓ |
| Save import mappings | ✗ | ✓ | ✓ |
| Custom guest fields | ✗ | maximum 2 | maximum 20 |
| Custom automatic seat assignment | ✗ | ✗ | ✓ |
| Unique record IDs | ✗ | ✗ | ✓ |

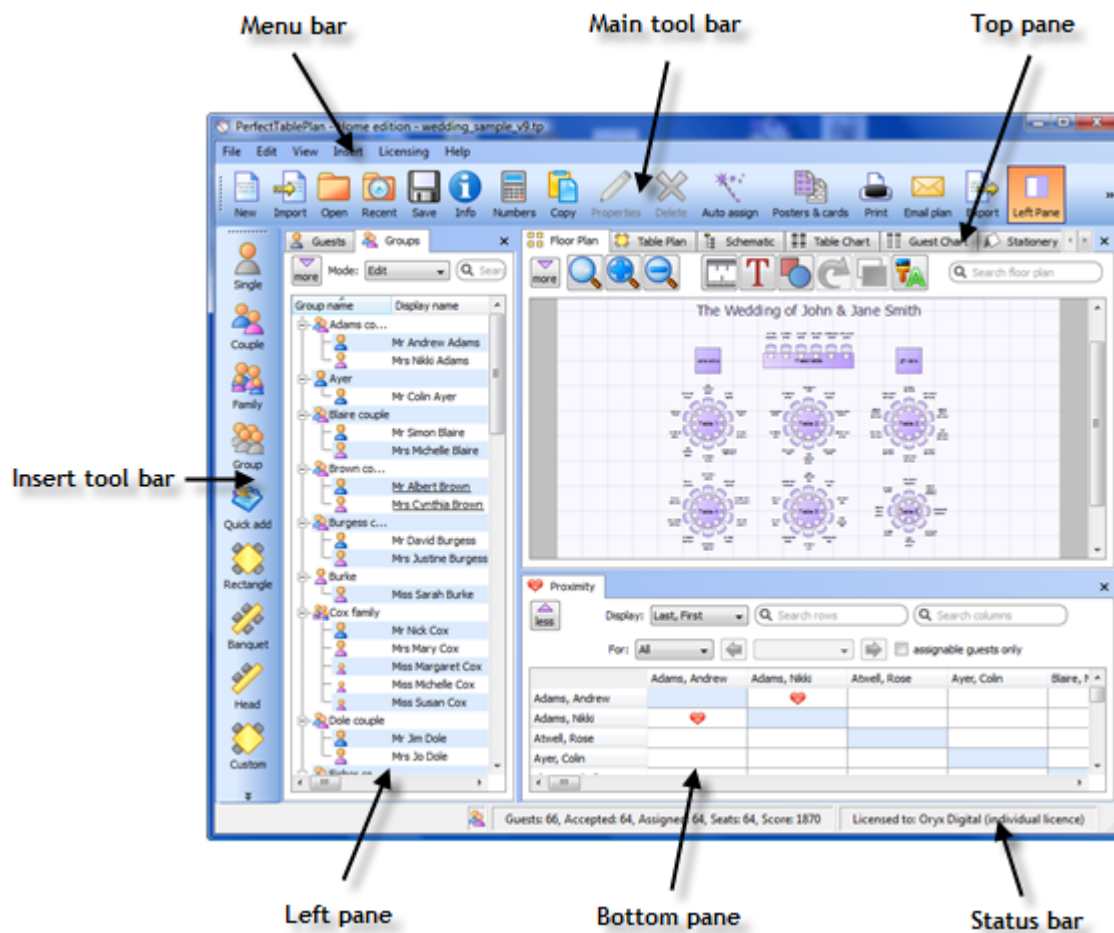
| | | | |
|----------------|-----------------------------|------------|----------------------|
| Import | guest data | guest data | guest + seating data |
| Reports | summary | summary | summary |
| Price per user | see website | | |

[Upgrade to a higher edition](#)

2 Reference

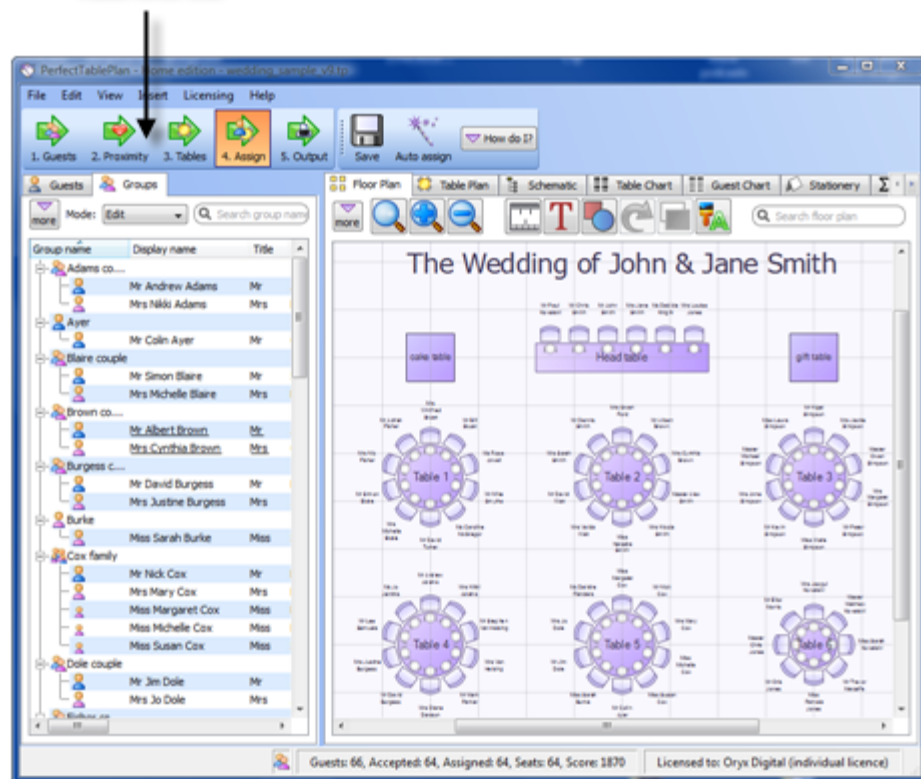
2.1 User interface

2.1.1 Main window



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

Task tool bar



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](#)

[Keyboard accelerators](#)

2.1.2 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 Many are available as [keyboard accelerators](#), for example to access **File**> **Open** without using the mouse type **⌘+O**..

2.1.3 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: Output plan |












2.1.4 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.


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.

You can also hide the tool bar buttons for basic actions by checking **hide new/open/recent/save tool bar icons** in the  [Preferences window](#)

| Button | Meaning |
|---|--------------------------|
|  | New plan |
|  | Import guest information |

| | |
|---|--|
|  | Open existing plan |
|  | Open recently accessed plan |
|  | Save plan |
|  | Information window |
|  | Numbers and Budget window |
|  | Copy to clipboard contents of top pane |
|  | Show/edit properties of selected item |
|  | Delete selected item(s) |
|  | Automatic seat assignment |
|  | Order poster prints and place cards |
|  | Print Top pane |
|  | Email plan as an attachment (not available on Mac) |
|  | Export plan in various formats |





| | |
|---|---|
|  | Show/hide Left pane |
|  | Show/hide Top pane |
|  | Show/hide Bottom pane |
|  | 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](#).


2.1.5 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.

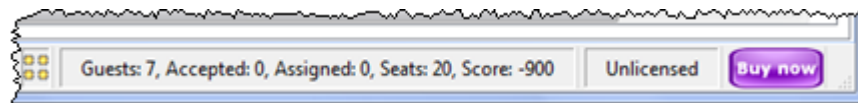
Note All of the **Insert** tool bar icons are only displayed if you have selected **View>User interface>Expert**. Otherwise only icons appropriate to the [current task](#) are displayed.

| Button | Meaning |
|---|---------------------|
|  | Insert single guest |
|  | Insert guest couple |
|  | Insert guest family |
|  | Insert guest group |


| | |
|---|----------------------------|
|  | Quick add guests |
|  | Insert rectangular table |
|  | Insert banquet table |
|  | Insert head table |
|  | Insert custom table |
|  | Insert circular table |
|  | Insert semi-circular table |
|  | Insert oval table |
|  | Insert row of seats |

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](#).

2.1.6 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)

2.1.7 Left pane

2.1.7.1 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 **x** 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.



2.1.7.2 Guests pane

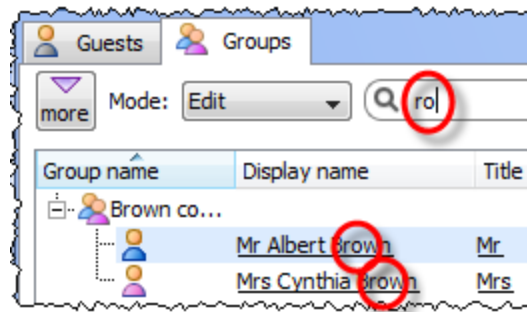
The  **Guests** pane shows all the guests in the current plan as individuals.


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 ~~striketrough~~ 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 hide non-matching guest names. E.g. if you type **j o** it will hide all guests without **j o** in their title, first name, last name or display name (case is ignored). Click the  cancel icon to clear the field.



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.

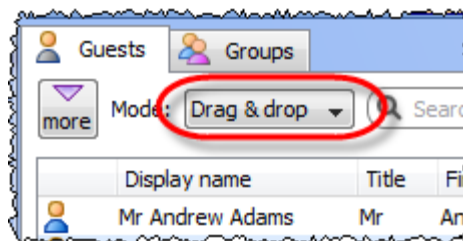
Note that changing the RSVP status of a guest from  **Accepted** may unassign them from their seat, depending on your settings in the  [Preferences window](#).




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](#),  [Table Plan](#) or  [Schematic](#) panes to assign them to a seat. Hold down the *Shift* key to also drag all the other members of their group.

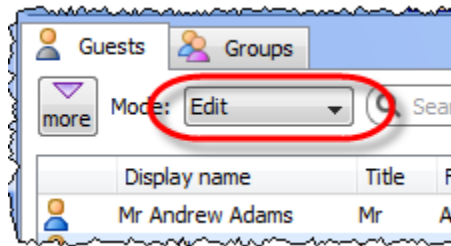
Edit guest properties by double-clicking on them or *Ctrl*+click and select **Properties** from the pop-up menu.

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](#)

2.1.7.3 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 hide non-matching group names. Guest names are not searched. E.g. if you type *Acme* it will hide all groups without *Acme* in their name (case is ignored). Click the  cancel icon to clear the field.

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 the 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](#).

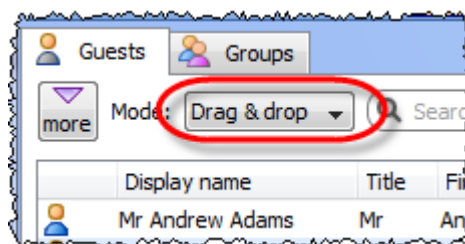
Drop a plan file onto this pane to open it. Drop a vCard, text or CSV file onto this pane to [import](#) it.

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](#),  [Table Plan](#) or  [Schematic](#) panes.

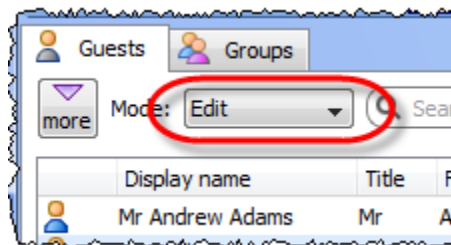
To change group membership left click on one or more a guests or groups and drag them from one group to another within the  **Groups** pane

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.

2.1.8 Top pane


2.1.8.1 Top pane

The **Top** pane contains the  [Floor Plan](#),  [Table Plan](#),  [Schematic](#),  [Table Chart](#),  [Guest Chart](#),  [Stationery](#) and  [Report](#) 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 x 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.


2.1.8.2 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 in the footer!

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


Advanced and Professional editions only

Click the  **Insert image** button to add images to the floor plan (e.g. to add a logo).



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.

Type text in the  **Search** field to select matching floor plan items. E.g. if you type **x** it will select all floor plan items that contain an 'x' (case is ignored). Click the  cancel icon to clear the field. Note that only text visible in the floor plan is searched (e.g. the contents of a guest's **Notes** field will only be searched if the **Guests** drop-down field is set to **Notes**).

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**.

Note The name and number of seats assigned/unassigned is not displayed for a row of seats in the **Floor Plan** pane.

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.

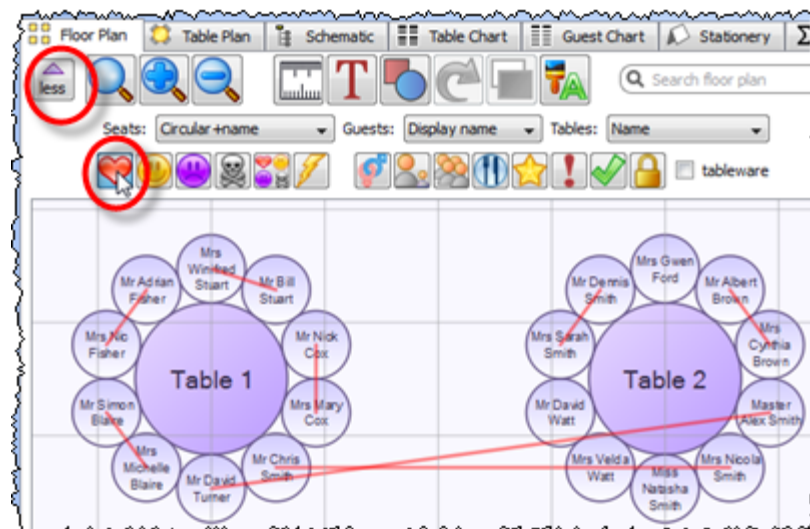
Ctrl+click on a table or seat to display actions in a pop-up menu.

Assessing your plan

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 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 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. We have chosen the colours to be easily 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.

Check **tableware** to display place settings for each seat at a table.

Hint Some of the above will be easier to see if you use simple (e.g. default)

[colours](#) in the  Floor Plan pane.




Mouse wheel

If your mouse has a mouse wheel you can use it to scroll or zoom, depending on the settings in the  [Preferences window](#). If you have set the mouse wheel to scroll vertically hold down the *Shift* key to zoom, and vice versa. If you have set the mouse wheel to scroll horizontally, hold down the  key to scroll horizontally.


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**.

2.1.8.3 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](#).

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 when it is pointing 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.

Click the **Terms** button to change the words used in the pane.

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 [!\[\]\(ec9132f1d27c8919987d92907322654d_img.jpg\) **Information window**](#).

Changing the Table plan

Guests can be dragged between seats or from the [!\[\]\(aa53ad6fea213b8b2226d3077e30533a_img.jpg\) **Guests pane**](#) or [!\[\]\(a1c2189b125458bd8fa8822d0c2da6bc_img.jpg\) **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. We have chosen the colours to be easily 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.

Check **tableware** to display place settings for each seat at a table.

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




Mouse wheel

If your mouse has a mouse wheel you can use it to scroll or zoom, depending on the settings in the  [Preferences window](#). If you have set the mouse wheel to scroll vertically hold down the *Shift* key to zoom, and vice versa. If you have set the mouse wheel to scroll horizontally, hold down the  key to scroll horizontally.


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**.


2.1.8.4 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](#).

Type text in the  **Search** field to hide non-matching table names. Guest names are not searched. E.g. if you type `head` it will hide all tables without `head` in their name (case is ignored). Click the  cancel icon to clear the field.

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.

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

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

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 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.

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


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

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

- guests who have (or haven't) been assigned to seats; or

- guests by RSVP status; or
- all guests; or
- selected 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 in the footer!

Click the **Terms** button to change the words used in the pane.


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.

2.1.8.7 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.

Note You can [order place cards from our website](#).

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 **For** drop-down list to choose which guests/groups you wish to create stationery items for.

For example, if you are printing place cards, you probably want to select **Item per** to **Guest** and **For** to **Assigned**. If you are printing invitations you probably want to select **Item per** to **Group** and **For** to **All**. If you want to reprint an individual place card you probably want to select **Item per** to **Guest** and **For** to **Selected....**

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 **T 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.


Advanced and Professional edition only

To add images to your design:

1. Click on the  **Insert image** button.
2. Click on the area of the design you wish to add the image.
3. Click on the **Browse...** button to select the image.
4. Change the dimensions to the appropriate size.

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 **I 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  <u>Information window</u> | 31/1/2007 | Guest, group or Table |
| {event_name} | event name from  <u>Information window</u> | Gala dinner | Guest, group or Table |
| {event_notes} | event notes from  <u>Information window</u> | | Guest, group or Table |
| {event_venue} | event venue from  <u>Information window</u> | 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 John Smith | Guest |
| {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_multi_line} | guest meal, one course per line | soup fish | Guest |
| {guest_meal} | guest meal | soup, 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_groups_multi_line} | list of groups at table, one group per line | Smith family Jones family | Table |
| {table_groups} | list of groups at table on one line | Smith family & Jones family | Table |
| {table_guests_multi} | list of guests at | Mr J Smith | Table |

| | | | |
|------------------------|-------------------------------------|----------------------------------|-------|
| _line} | table, one guest 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** to **Table**.

Exporting

You can export your stationery to a PDF file by selecting **File>**  **Export** and selecting stationery to PDF file.

See also:

[Print stationery tutorial](#)

[Load sample stationery](#)

[Create address labels](#)

2.1.8.8 Report pane

The  **Report** pane shows a report of your plan. It is not possible to make changes

to the plan from this pane.

Professional edition only

Type is the type of report. A **Summary** report gives you an overall summary. A **Detailed (summary)** report allows you to report in detail about a particular aspect of the plan. A **Detailed (guests)** report is similar to a **Detailed (summary)** report, but also lists guest names.

Display is the guest property you wish to display, e.g. the meal choice.

By is how you want to group the results, e.g. by table. Choose **N/A** if you don't want to group the results.

For allows you to specify which guests you wish to include in your report.

For example, if you have a custom field 'amount owing' and you want a total of how much money is owed by each group for all the people that have accepted their invitations set **Type** to 'Detailed summary', **Display** to 'amount owing', **By** to 'Group' and **For** to 'RSVP accepted'.

Click the **Terms** button to change the words used in the report.



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 **report 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.

2.1.9 Bottom pane

2.1.9.1 Bottom pane

The Bottom pane contains the  [Proximity pane](#). If you have PerfectTablePlan [Professional Edition](#) it may also contain  [Custom Field Proximity panes](#).

If **View>User interface>Expert** is selected you can hide this pane by clicking on the **x** 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.





2.1.9.2 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.

Type text in the  **Search row** and  **Search column** fields to hide non-matching guest names. E.g. if you type *jo* in the  **Search row** field it will hide all rows for guests without *jo* in their name (case is ignored). Click the  cancel icon to clear the field.


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 **For**:

- **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](#)).

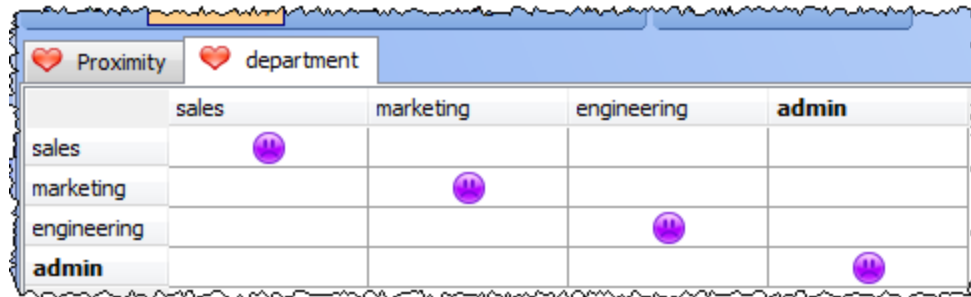
Hint If you want to change the proximity for everyone in a group it may be easier to select a group (in the Groups pane) or more than one guest (in the  [Guests pane](#) or  [Groups pane](#)) and then select **Edit>Proximity**. You can set the proximity for everyone on a table by selecting the table and then **Edit>Proximity**. This can be useful for [arranging multiple seatings](#).

2.1.9.3 Custom Field Proximity pane

Professional editions only

The  **Custom Field Proximity** pane allows you to set guest proximities based on custom field.

You can set proximities for [custom fields](#) of type Yes/No and Selection. E.g. if you have a Selection custom field "department" with values "sales", "marketing", "engineering" and "admin" you can set proximities in this pane so that the [automatic seat assignment](#) will try not to seat people in the same department together.



| | sales | marketing | engineering | admin |
|-------------|-------|-----------|-------------|-------|
| sales | ⚠⚠ | | | |
| marketing | | ⚠⚠ | | |
| engineering | | | ⚠⚠ | |
| admin | | | | ⚠⚠ |

Note Setting proximities for custom fields may slow down the automatic seat assignment.

2.1.10 Windows

2.1.10.1 Windows

Help on the following windows is available:

[About window](#)

[Change Group window](#)

[Chart Title/Footer window](#)

[Custom Field window](#)

[Dimensions window](#)

[Export window](#)

[Export Data window](#)

[Export PDF window](#)

[Export VCard window](#)

[Fonts and Colours window](#)

[Group Properties window](#)

[Guest Properties window](#)

[Image Properties window](#)

[Import window](#)

[Import Data window](#)

[Information window](#)

[Insert Couple window](#)

[Insert Family window](#)

[Insert Image window](#)

[Insert Group window](#)

[Insert Guest window](#)

[Insert Shape window](#)

[Insert Table window](#)

[Insert Text window](#)

[Join Columns window](#)

[Licence window](#)

[Main window](#)

[Most Recently Accessed window](#)

[Numbers and Budget window](#)

[Preferences window](#)

[Print window](#)

[Print Setup window](#)

[Quick Add Guests window](#)

[Save Stationery Layout window](#)

[Select Gradient window](#)

[Select Groups window](#)

[Select Guests window](#)

[Shape Properties window](#)

[Split Columns window](#)

[Stationery Layout window](#)

[Table Order window](#)

[Table Properties window](#)

[Text Properties window](#)


2.1.10.2 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.

2.1.10.3 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](#).

2.1.10.4 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.


We would really appreciate a mention of www.perfecttableplan.com in the footer!


2.1.10.5 Custom Fields window


[Advanced and Professional editions only](#)

The **Custom Fields** window allows you to define your own properties for guests. For example you can add properties to define: which organization a guest belongs to, which languages they speak and how much they have paid for their ticket. To display this window select **Edit>Custom Fields...**

Click on  **Add** to add a new custom field. The number of custom fields are limited by the [edition](#) selected.

Click on  **Del** to delete the selected custom fields.

Click on  **Up** to move the selected custom fields up.

Click on  **Down** to move the selected custom fields down.

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

The properties of each custom field are:

| Property | Meaning |
|-----------------------|--|
| Name | The name of the custom field (maximum 20 characters). No two custom fields can have the same name. |
| Type | The type of field (see below). |
| Allowed values | The values the field can take. The user can only set this for Selection types. |
| Default value | The value set by default for new and existing guests. |
| Notes | Notes on the field. This appear as a tooltip when you hover over the corresponding control. |

The types of custom field are:

| Field type | Allowed values | Example usage |
|---------------|------------------|-------------------------|
| Yes/No | Yes or No. | In wheelchair |
| Text | Any text. | Job title |
| Number | Any whole number | Bottles of wine ordered |

| | | |
|------------------|---|------------------|
| | (integer) between - 2,147,483,648 and 2,147,483,647. | |
| Currency | Any floating point number between -21,474,836.48 and 21,474,836.47. Accurate to two decimal places. | Amount owing |
| Selection | One of a comma separate list of items defined in the Allowed values column. | Employer |
| Tags | 0, 1 or many comma separated items. | Languages spoken |


For example you might create a:

- Selection custom field called "affiliation" with values "wedding party", "bride's family", "groom's family", "bride's friends", "groom's friends" and "other". Each guest can then be categorised by their affiliation into exactly one of the allowed values.
- Tags custom field called "languages spoken". For each guest you can then list 0, 1 or many languages they speak separated by commas, e.g.: "English", "English,Spanish" or "English,French,Spanish".

You cannot change the type of a custom field after you have clicked **OK**. You can delete it and replace it with a custom field with a different type and the same name, but you will lose all the values set for the original custom field.

Custom fields affect PerfectTablePlan in the following ways:

Guests pane and Groups pane

An additional column appears for each custom field. You can show/hide these fields by clicking on the  button and checking/unchecking the appropriate box.

Import window

Values can be imported into custom fields. Any £, \$ or € characters will be stripped from currency values during importing.

Floor Plan pane

Visualization buttons are added for each custom field of type Yes/No, Tags and Selection. If you click one of these buttons the guests will be coloured appropriately. For Tags types a separate colour band is shown for each value.

A custom field property can be displayed instead of the guest name by selecting the custom field from the **Guests** drop-down list.

Custom field values are shown when you hover over a guest.

Table Plan pane



similar to the **Floor Plan** pane, but custom fields can also be shown in the legend text by checking the appropriate box. You can show/hide these fields by clicking on the  button and checking/unchecking the appropriate box.

Table Chart pane and Guest Chart pane

A check box is shown for each custom field. You can show/hide these fields by clicking on the  button and checking/unchecking the appropriate box.

Stationery pane

A substitution text is added for each custom field, e.g. if the custom field name is "Languages spoken" the substitution text will be {languages_spoken}.

Report pane

Custom fields are included in reports. Number and currency fields are summed.




Automatic seat assignment

You can set proximities for fields of type Yes/No and Selection. For example, you could create a custom field 'married status' with allowed values: married, single male and single female . You could then set the proximity in the appropriate [Custom field proximity pane](#) so that single males are sat next to single females by the automatic seat assignment.

Export window

Custom fields values can be exported.

2.1.10.6 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.

Size is the size of the floor plan metres/feet **across** (X) and **down** (Y).

Area is **across** x **down**, in m² or ft² (depending on your choice of units).

Area per guest is the amount of area per guest, in m² or ft² (depending on your choice of units).


Area per accepted guest is the amount of area per guest who has  accepted, in m² or ft² (depending on your choice of units). As a rough guideline:

| | | |
|--------------|-----------------------------|-------------------------|
| seating type | comfortable space per guest | minimum space per guest |
|--------------|-----------------------------|-------------------------|


| | ft ² | m ² | ft ² | m ² |
|--------------------------------------|-----------------|----------------|-----------------|----------------|
| 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.

Note Printing a fine grid (e.g. each foot) in a large room can slow down print times considerably.

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.

Advanced and Professional edition only

You can add a background image to the  **Floor Plan** pane, scale it to the appropriate size and then place your tables on top of it. This can be very useful when you have a scale floor plan of the venue.



scaled floor plan image

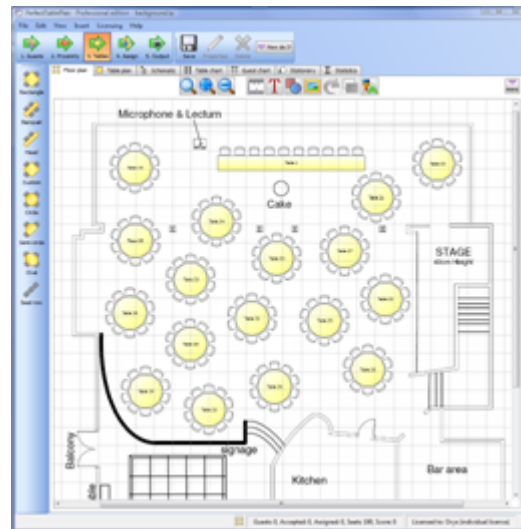


image used as floor plan background with tables added

Click on **Browse...** to locate the image file you want to use as your background. PNG, JPEG and BMP image file formats are supported.

Click on **Delete** to delete the background image.



Change Background image size to change the size of the background image as it appears in the **Floor Plan** pane. It will be in the units set in the **Units** field. Uncheck constrain proportions if you want to stretch the floor plan image vertically or horizontally (you won't need to do this if it is to scale).

The image data is stored inside your plan file, so you can move the plan file to another computer without losing your image.



Note A very large image may cause your plan to be slow to load, draw and save. You can use a graphics package such as Adobe Photoshop to resize your image smaller. Images larger than 0.25 Mega pixels will be compressed in JPEG format for faster loading and saving. This will remove any transparency in the image and may also reduce the image quality.

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

2.1.10.7 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.

2.1.10.8 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 CSV/text 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 a complete list of guests to send to your stationery supplier, you should select **guest**.
- 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**.

Select from the **For** 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.

Click on the  button to show more options.

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 [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.

Note Excel and many other types of application can open/import CSV files.

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](#)

2.1.10.9 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 **Size** drop-down list.

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

For a custom page size select <Custom> from the **Size** drop-down list and set **Width**, **Height** and **Units** appropriately.



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

See also:

[Export formats](#)

2.1.10.10 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](#)


2.1.10.11 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.

Select coloured buttons to set the colours/gradients for the appropriate text, tables, seats and backgrounds. Some of these button may give you choice of a solid colour or a [gradient](#).

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.

2.1.10.12 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.

2.1.10.13 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

Check **Anonymous** if you don't know the name of the 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 [ΣReport 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 [ΣReport](#) 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.

[Advanced and Professional editions only](#)


You can [add your own custom fields](#).

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](#)

2.1.10.14 Image Properties window

[Advanced and Professional editions only](#)

The  **Image properties** window allows you to show/edit image properties in

the  [Floor Plan pane](#). To display this window select a single image in the  [Floor Plan pane](#) and select **Edit>**  **Properties** or the equivalent **Main** tool bar button.

A preview of the currently selected image is displayed. You can drag and drop a new image here, e.g. from Mac OS X Finder or a web browser.

If you have added other images to this plan you can select them from the **Select image** drop-down list.

Click on the **Browse...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported.

Name is the name of the original image file.

Pixels is the size of the image in pixels (the preview may be displayed smaller in this window).

Set the **Size** field(s) to the dimensions of the image as it appears in the floor plan. Note that the image preview will not change.

Check **Constrain proportions** to display the image with the same width:height proportions (aspect ratio) as the image.

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



Set **Angle** to the rotation angle of the image on the floor plan. Note that the image preview will not change.

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

The image data is stored inside your plan file, so you can move the plan file to another computer without losing your image data.

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.

2.1.10.15 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](#)


2.1.10.16 Import Data window

The  **Import Data** window allows you to import data into your plan from other applications, for example [from an CSV or text 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 **CSV/text 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 files on Mac OS X, you will have to convert it to a .csv which PerfectTablePlan can read. Renaming a file from .xls/.xlsx to .csv will not work.

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. Click on the  button to show more options.

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> | Group |
| row 1 | Mr | Smith | | beef |
| row 2 | Miss | Brown | | fish |
| row 3 | Mr | Brown | | fish |
| row 4 | Mrs | Brown | | beef |

Empty lines in your import file are ignored.

If you have multiple guests in one row or the title, first name or last name are not in separate columns, PerfectTablePlan will do it's best 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 Brown | | | |
| row 5 | K Brown, H Jones | | | |
| row 6 | Mr Digby A Dashing-Smythe and Miss Kate Marlow-Henley | | | |
| row 7 | Andrew, Beryl & Cloe Cooper | | | |
| row 8 | J Smith +1 | | | |

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 |
|--------|---|
| Gender | <p>Text must start with:</p> <ul style="list-style-type: none"> • 'F' or 'f' for a female • 'M' or 'm' for male <p>otherwise the guest is imported with unknown gender</p> |
| Age | <p>Text must start with:</p> <ul style="list-style-type: none"> • 'C' or 'c' for a child <p>otherwise the guest is imported as an adult</p> |
| VIP | <p>Text must start with:</p> <ul style="list-style-type: none"> • 'V', 'v', 'Y' or 'y' for a VIP <p>otherwise the guest is imported as an non-VIP</p> |
| RSVP | <p>Text must start with:</p> <ul style="list-style-type: none"> • 'S' or 's' for sent • 'A', 'a', 'Y' or 'y' for accepted • 'C' or 'c' for cancelled • 'D', 'd', 'N' or 'n' for declined <p>Or be:</p> <ul style="list-style-type: none"> • 'Delivered' for sent, case unimportant (for integration with pingg.com) <p>otherwise the RSVP status is unset.</p> |

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

[Advanced and Professional editions only](#)

Importing custom fields

You can import custom fields as below:

| Type | Value |
|-----------|---|
| Yes/No | '1' or text starting with 'y' or 't' (not case sensitive) imported as 'yes' '0' or text starting with 'n' or 'f' (not case sensitive) imported as 'no' Otherwise set to default |
| Text | Text imported |
| Number | Valid whole numbers imported Otherwise set to default |
| Currency | Valid whole numbers or decimals numbers imported Otherwise set to default |
| Selection | Allowed selections imported Otherwise set to default |
| Tags | Text imported |

Saving mappings

If you create a new import mapping you will be given the option to save it for use as a new **File type**. This will then be available the next time you import.

Importing groups

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

1. have a group 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


| | 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 **group consecutive guests with same last name** is checked then consecutive guests with the same last name will be added to the same group. This can be useful for family events. This option is not available if you have set a group column.

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.

| | 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.

Professional edition only

Importing seating data

You can specify the guest table or table+seat during import. You must create tables with the appropriate names and numbers of seats before you import guests (the names of tables are not case sensitive).

Map imported columns to guest properties

| | column 1 | column 2 | column 3 |
|----------|---------------|------------------|---------------|
| property | Full name(s) | Table/Row name ▼ | Seat number ▼ |
| row 1 | Mr John Smith | table 1 | 1 |
| row 2 | Mrs Jo Brown | table 2 | 5 |

If the table cell is left blank the guest will not be assigned a seat.

Seats are numbered from 1 and proceed clockwise. If you specify just the table or the seat cell is left blank, the guest will be assigned to the first empty seat, starting with seat 1 and proceeding clockwise. Guests will not be assigned to seats that are already assigned.

Note If **Allow seat assignment with RSVP** is not set to **Any** in the **Preferences** window you will need to set the RSVP status of any guests to be assigned seats to 'Accepted' during import or they cannot be assigned seats.

If you have problems you can  **Edit>Undo** the import and try again.

Importing guest ids

Select **ID** to designate a column as containing the unique identifier for guests. The identifier can be any unique string of characters of any length. The guest will keep this identifier right through to saving or exporting the plan, even if their name is changed. If you don't have an **ID** column guests will be assigned unique identifiers by PerfectTablePlan.

Further 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 the first row is a header and you won't want to import it.

Use the **Format** drop-down list to choose whether the imported file is in **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.

Check **group consecutive guests with same last name** if you want to automatically assign consecutive guests with the same last name into the same group. This option is not available if you have [selected a group column](#).

Uncheck **single guest per row** if some rows might contain names of multiple guests e.g. if you want to interpret "Mr & Mrs Smith" as separate guests "Mr Smith" and "Mrs Smith".

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 **Split column(s)...** to split one or more selected columns into multiple columns. Click on **Join columns...** to join two or more selected columns into a single column. See below for more details.

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

Splitting and joining columns

When you are importing it can be useful to split and join columns. For example you might want to split a column in the format "name, company" into two separate columns "name" and "company", so you can import them into separate fields in PerfectTablePlan.

You can carry out multiple split and join operations to get the data into the appropriate format.

To split, select on one or more columns you want to split and click on the **Split column(s)...** button. The [Split Columns window](#) will appear.

To join, select two to four columns you want to join and click on the **Join columns...** button. The [Join Columns window](#) will appear.

Select multiple columns using *Shift+click* or *⌘+Click*.

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](#)



[Quick Add Guests window](#)

[Importing guests from Excel files](#)

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

[Importing guests from vCards](#)

2.1.10.17 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.


2.1.10.18 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

Check **Anonymous** if you don't know the name of the guest. Any guest below will also be set to anonymous by default.


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 [ΣReport 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 [ΣReport](#) 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**.

[Advanced and Professional editions only](#)

You can [add your own custom fields](#).


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.

2.1.10.19 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.

Check **Anonymous** if you don't know the name of the guest. Guests below will also be set to anonymous by default.

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  [Report 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  **Report** 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**.

Advanced and Professional editions only

You can [add your own custom fields](#).

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.

2.1.10.20 Insert Image window

Advanced and Professional editions only

The  **Insert image** window allows you to add images to the  [Floor Plan pane](#). These images can be useful for adding logos, crests, decorative features and floor plan items that are not well represented by [shapes](#). To display this window click the  **Insert image** button at the top of the  **Floor Plan** pane.

A preview of the currently selected image is displayed (if any). You can drag and drop a new image here, e.g. from Mac OS X Finder or a web browser.

If you have already added images to this plan you can select them from the **Select image** drop-down list.

Click on the **Browse...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported.

Name is the name of the original image file.

Pixels is the size of the image in pixels (the preview may be displayed smaller in this window).

Set the **Size** field(s) to the dimensions of the image as it appears in the floor plan. Note that the image preview will not change.


Check **Constrain proportions** to display the image with the same width:height proportions (aspect ratio) as the image.

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


Set **Angle** to the rotation angle of the image on the floor plan. Note that the image preview will not change.

Notes can be used to store any relevant notes for the image. 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 image 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.

The image data is stored inside your plan file, so you can move the plan file to another computer without losing your image data.

You can change any of the image properties at a later point using the  [Image Properties window](#).

2.1.10.21 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.

Check **Anonymous** if you don't know the name of the guest. Guests below will also be set to anonymous by default.

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 Σ [Report 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 **Σ Report** 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**.

[Advanced and Professional editions only](#)

You can [add your own custom fields](#).


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.


2.1.10.22 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

Check **Anonymous** if you don't know the name of the 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  [Report 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  **Report** 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**.

[Advanced and Professional editions only](#)


You can [add your own custom fields](#).

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.

2.1.10.23 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 drop-down list and colour button to set a solid colour or [colour gradient](#) 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](#).

2.1.10.24 Insert Table window

The **Insert Table** window allows you to create one or more tables. To display this window select **Insert>**  **Rectangular Table**, **Insert>**  **Banquet Table**, **Insert>**  **Head Table**, **Insert>**  **Custom Table**, **Insert>**  **Circular Table**, **Insert>**  **Semi-Circular Table**, **Insert>**  **Oval table**, **Insert>**  **Row Seats** 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:




Select **solid** or **gradient** and click the colour/gradient button to choose the colour/gradient of the table in the  **Floor Plan** and  **Table Plan** panes. This overrides any table colour set for the pane. Click **Default** to set the table colour back to the default.


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

| Table | Icon | Meaning |
|-------------|---|--|
| 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 or banquet |
| Custom |  | a rectangular or square table with potentially different numbers of seats on each of the 4 sides |
| Circular |  | a circular table with seats all around it |
| Semi-circular |  | a semi-circular table with seats around the straight side and/or curved sides |
| Oval |  | an elliptical table with seats all around it |
| Row of seats |  | a row of seats (no table) |

Seats is the number of seats. For a circular, oval or head table or a row of seats 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 semi-circular table you specify the number of seats across and around. 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.


Note The automatic table size is calculated to avoid gaps and overlaps between seats, partly on aesthetic grounds. Click [here](#) to find out about 'industry standard' table sizes.

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](#).

2.1.10.25 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  [Text Properties window](#).

2.1.10.26 Join Columns window

The **Join Columns** window allows you to join columns of data in the [Import Data window](#). This can be very useful for modifying input data into an appropriate format to import into PerfectTablePlan. To display this window click on the **Join columns...** button in the **Import Data** window (you may need to click the  button to make the **Join columns..** button visible).

Set the **order** to the order you wish to join the column(s) in.

Set the **separator** to the text you wish to join the columns with.

Select **ignoring empty cells** to ignore empty cells.

Click **OK** to join the columns and close the window.

Click **Cancel** to discard the changes.



Joining creates a new column to the right of the columns being joined. The new column is selected. The original columns are not changed.

You can carry out as many split and join operations as you need to get your data into appropriate columns.

See also:


[Split columns window](#)

2.1.10.27 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 **Buy licence key now** to purchase a licence key on-line (an Internet connection is required).

Click **Upgrade V3 to V4** if you have a version 3 key and wish to upgrade to version 4.

Click **Upgrade edition** to upgrade to a [higher edition](#) of PerfectTablePlan.

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](#)

2.1.10.28 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.


2.1.10.29 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 x 0% + 10 x 10% + 10 x 95% + 5 x 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.

2.1.10.30 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**.

Editions



There are 3 different PerfectTablePlan products (editions). Each edition is aimed at a different type of user. When you enter your licence key in the [Licence window](#) this will set PerfectTablePlan to the edition you have purchased. But, if you are using the trial version of PerfectTablePlan, you can choose any of the 3 editions to try. You can also try a different edition to the one you have purchased (for example you can try the Advanced edition, even if you have only purchased the Home edition) but your licence key will be invalid until you revert to the correct edition.

Note You may lose data if you change the edition. For example, if you change from Advanced edition to Home edition any custom fields will be deleted. You may therefore wish to save your plan before changing edition.

Click **Compare editions** to [find out more about the different editions of PerfectTablePlan](#).

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 **tool bar text** to show text under each tool bar icon.

Check **hide new/open/recent/save tool bar icons** to hide the tool bar buttons for basic actions. Even if this box is unchecked the buttons will only be shown in some contexts, depending on the **View>User interface** and [Task bar](#) settings.

Check **export image as large as possible** to make  **Floor Plan** or  **Table Plan** images created by exporting as large as possible (each seat up to 400 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 Mac OS X 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" |

Use **New seat row name format** to set the default name for rows of seats. Similar to above, but using {next_row_num} to substitute in the number of the next row.

Use **Anonymous guest name format** to set the name format for anonymous guests.


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 **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.

Select **Automatically check for software updates** depending on how frequently you wish to check online for updates to PerfectTablePlan.

Auto assignment

Select **according to guest proximity** if you want 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.

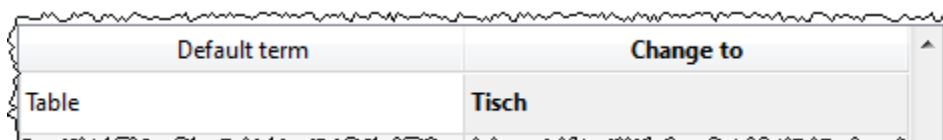
Click  **Sort** to sort the titles alphabetically.

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.

Terms

You can change words that appear in the Table Plan pane, Guest Chart pane and Report pane here. For example, you might want to use the German "Tisch" instead of the English "Table":



| Default term | Change to |
|--------------|-----------|
| Table | Tisch |

To change which terms are shown, select from the **Show terms for** drop-down list. To change a term just click on the appropriate term in the **Change to** column and edit it. To restore all the terms to the default settings click the **Reset defaults** button.

Note These changes only affect words inside panes. The user interface is currently only available in English.

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.

2.1.10.31 Print window

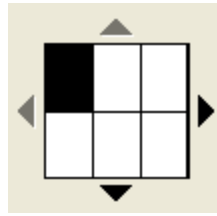
The  **Print** window is displayed when you print the front pane in the [Top pane](#). To display this window select **File> Print** or the equivalent **Main** tool bar button. You can only print the  **Floor Plan**,  **Table Plan**,  **Table Chart**,  **Guest Chart**,  **Stationery** and  **Report** 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 also change the number of pages to be printed through the **Setup** button, e.g. just print the first 2 pages of 10.

See also:

[Print to poster size](#)

[Export to PDF format](#)

2.1.10.32 Print Setup window

The **Print Setup** window allows you to change printer settings. To display the **Print Setup** window select **File>Print Setup...** or 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](#)

2.1.10.33 Quick Add Guests window

The  **Quick Add Guests** window allows to quickly enter guest names in free text. It is simpler (but less powerful) than [importing](#). To display this window select **Insert>**  **Quick Add Guests** 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.

2.1.10.34 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.

2.1.10.35 Select Gradient window



The  **Select Gradient window** allows you to define a simple linear gradient (a smooth transition from one colour to another). The window appears when you edit a gradient or change from a colour to a gradient.

The **Preview** shows the gradient as currently selected.

The gradient transitions linearly from **Gradient colour 1** to **Gradient colour 2** in the direction set by the **Gradient direction** dial.

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

2.1.10.36 Select Groups window

The **Select Groups** window allows you select as many groups as you like. It is displayed when you set the **For** drop-down list to **Selected...** in the  **Guest Chart** or  **Stationery** panes.

Unselected groups are shown in the left list. Selected groups are show in the right list.

Click **Add>** to add the group(s) currently selected in the left list to your selection.

Click **Add all>>** to add all group(s) to your selection.

Click **<Remove** to add the group(s) currently selected in the left list to your selection.



Click **<<Remove all** to add all groups(s) to your selection.

You *Ctrl*+click and/or *Shift*+click to select multiple groups. You can also double click a group to move it from one list to another.

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

Click **Cancel** to discard the changes.

2.1.10.37 Select Guests window

The **Select Guests** window allows you select as many guests as you like. It is displayed when you set the **For** drop-down list to **Selected...** in the  **Guest Chart** or  **Stationery** panes or the **For** drop-down list in the **Export Data** window.

Unselected guests are shown in the left list. Selected guests are show in the right list.

Click **Add>** to add the guest(s) currently selected in the left list to your selection.

Click **Add all>>** to add all guest(s) to your selection.

Click **<Remove** to add the guest(s) currently selected in the left list to your selection.




Click **<<Remove all** to add all guests(s) to your selection.

You *Ctrl*+click and/or *Shift*+click to select multiple guests. You can also double click a guest to move it from one list to another.

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

Click **Cancel** to discard the changes.

2.1.10.38 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 drop-down list and colour button to set a solid colour or [colour gradient](#) 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.

2.1.10.39 Split Columns window

The **Split Columns** window allows you to split columns of data in the [Import Data window](#). This can be very useful for modifying input data into an appropriate format to import into PerfectTablePlan. To display this window click on the **Split column(s)...** button in the **Import Data** window (you may need to click the  button to make the **Split columns..** button visible).

Set the **separator** to the text you wish to split the column(s) at.

Select **every** to split at every occurrence of the separator token and **the first** to only split at the first occurrence.

Click **OK** to split the column(s) and close the window.

Click **Cancel** to discard the changes.

Splitting creates new columns to the right of the columns being split. The new columns are selected. The original columns are not changed.

For example "John Smith, CEO, Smith industries - UK" could be split into columns as follows:




| Separator | Occurrence | New columns |
|-----------|------------|--|
| , | every | "John Smith" "CEO" "Smith industries - UK" |
| , | first | "John Smith" "CEO, Smith industries - UK" |
| - | every | "John Smith, CEO, Smith industries" "UK" |

You can carry out as many split and join operations as you need to get your data into appropriate columns.

See also:

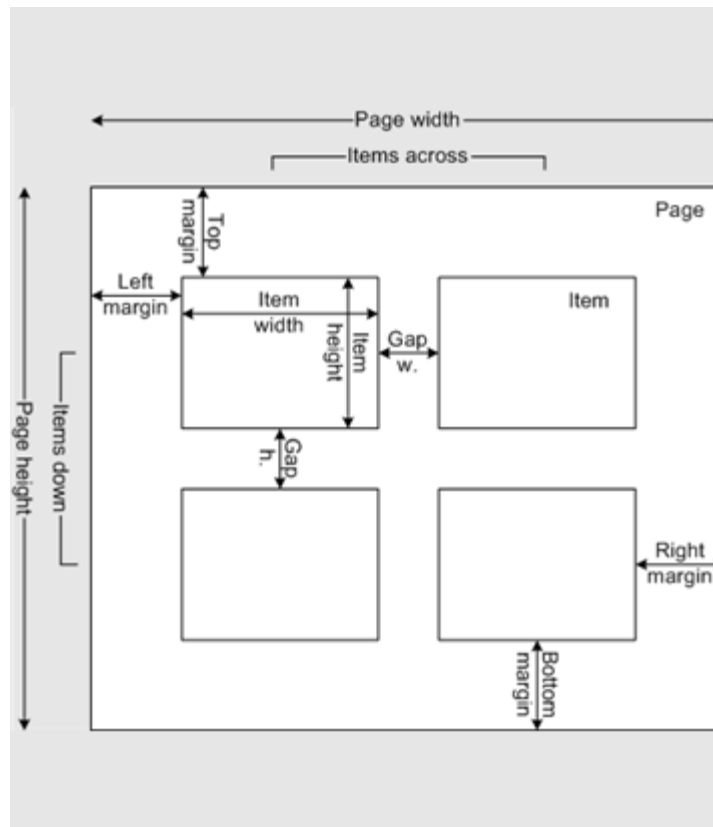
[Join Columns window](#)

2.1.10.40 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 (shown a bit larger below).




Change **Units** to change between mm and inches.

Click on a **Pre-defined** stationery type to set the layout accordingly. Type a text into the **QSearch** field to hide non-matching stationery types, e.g. type J8161 to find Avery J8161 address labels. Use the **Manufacturers**, **Types** and **Paper sizes** drop-down lists to filter which pre-defined stationery are listed.

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** to **Right margin** and **Top margin** to **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.

2.1.10.41 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.

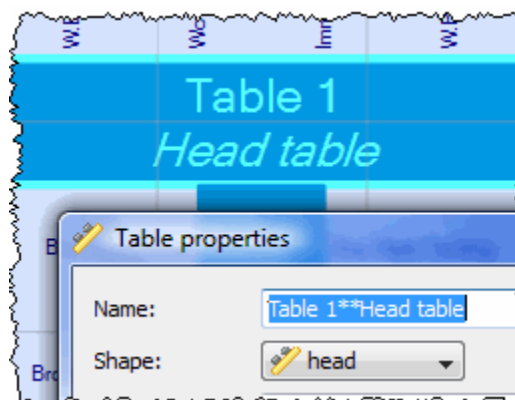
Click on the  **Sort** button to order tables. The sort is basically alphabetic, but is intelligent enough to order "table 10" after "table 2". The sort is not case sensitive.



Note You can also change the table order in the  **Schematic** pane by dragging and dropping tables or by using the buttons at the top of the pane.



2.1.10.42 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.


Select **solid** or **gradient** and click the colour/gradient button to choose the colour/gradient of the table in the  **Floor Plan** and  **Table Plan** panes. This overrides any table colour set for the pane. Click **Default** to set the table colour back to the default.


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

| Table | Icon | Meaning |
|---------------|---|--|
| 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 or banquet |
| Custom |  | a rectangular or square table with potentially different numbers of seats on each of the 4 sides |
| Circular |  | a circular table with seats all around it |
| Semi-circular |  | a semi-circular table with seats around the straight side and/or curved sides |
| Oval |  | an elliptical table with seats all around it |

| | | |
|--------------|---|---------------------------|
| Row of seats |  | a row of seats (no table) |
|--------------|---|---------------------------|

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.

Note The automatic table size is calculated to avoid gaps and overlaps between seats, partly on aesthetic grounds. Click [here](#) to find out about 'industry standard' table sizes.



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.

2.1.10.43 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.

2.1.11 Drag and drop

The following drag and drop operations are supported:

| Item | Modifier key | From | To | Result |
|---|--------------|--|--|--|
|  group(s) or  guest(s) | none |  Guests pane,  Groups pane,  Schematic pane,  Floor Plan pane or  Table Plan pane | seat, table or background in  Floor Plan pane,  Table Plan pane or  Schematic pane | guest(s) (re) assigned/ unassigned |
|  guest(s) | <i>Shift</i> |  Guests pane,  Groups pane,  Schematic pane,  Floor Plan pane or  Table Plan pane | seat, table or background in  Floor Plan pane,  Table Plan pane or  Schematic pane | all members of group(s) (re) assigned/ unassigned |
|  group(s) or  guest(s) | none |  Groups pane |  Groups pane | group membership changed |
| background | none |  Floor Plan | different | scrolls |

| | | | | |
|--|------|---|--|----------------------|
| | | pane or  Table Plan pane | position | |
|  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 |
|  CSV/text 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 |

2.1.12 Keyboard accelerators


Using keyboard accelerators can greatly improve your productivity. If you are using PerfectTablePlan a lot we suggest you find the time to learn at least some of them. The following keyboard accelerators are available for the Mac OS X version of PerfectTablePlan:

| Key | Accelerator | Action |
|-----|-------------|--------|
|-----|-------------|--------|

| | | |
|---|------|---|
| 1 | ⌘1 | Add guests task (Basic interface) |
| | ⌘1 | Hide/Show Left pane (Expert interface) |
| 2 | ⌘2 | Proximity task (Basic interface) |
| | ⌘2 | Hide/Show Top pane (Expert interface) |
| 3 | ⌘3 | Add tables task (Basic interface) |
| | ⌘3 | Hide/Show Bottom pane (Expert interface) |
| 4 | ⌘4 | Assign seats task (Basic interface) |
| 5 | ⌘5 | Print task (Basic interface) |
| A | ⌘A | Select all |
| B | ⌘B | Numbers and Budget |
| C | ⌘C | Copy |
| | ⌘C | Collapse all in Groups pane or Schematic pane |
| D | ⌘D | Show selected in Floor Plan pane |
| | ⌘⌘D | Show selected in Table Plan pane |
| | ⌘⇧⌘D | Show selected in Schematic plan pane |
| | ⇧⌘D | Show selected in Guests plan pane |
| | ⌘⇧D | Show selected in Groups plan pane |

| | | |
|---|--------|---|
| E | ⌘E | Export |
| F | ⌘F/⇧⌘F | Find in Guests, Groups or Proximity pane |
| G | ⌘G | Insert single guest |
| | ⇧⌘G | Insert guest couple |
| | ⇧⌘G | Insert guest family |
| | ⇧⇧⌘G | Insert guest group |
| H | ⌘H | Hide PerfectTablePlan |
| | ⇧⌘H | Hide others |
| I | ⌘I | Import |
| | ⇧⌘I | Information |
| J | ⌘J | Quick insert guests |
| K | ⌘K | toggle locked |
| L | ⌘L | Auto Assign Seats |
| M | ⌘M | Insert custom table |
| N | ⌘N | New plan |
| O | ⌘O | Open plan |
| | ⇧⌘O | Open Recent |
| P | ⌘P | Print |

| | | |
|----|------|---|
| Q | ⌘Q | Quit PerfectTablePlan |
| R | ⌘R | Insert rectangular table |
| | ⇧⌘R | Insert banquet table |
| | ⇧⌘R | Insert head table |
| S | ⌘S | Save plan |
| | ⇧⌘S | Save plan as |
| T | ⌘T | Insert circular table |
| | ⇧⌘T | Insert semi-circular table |
| | ⇧⌘T | Insert oval table |
| | ⇧⇧⌘T | Insert row of seats |
| U | ⌘U | Unassign guest |
| V | ⌘V | Paste |
| W | ⌘W | Close window |
| X | ⌘X | Cut |
| | ⇧⌘X | Expand all in Groups pane or Schematic pane |
| Z | ⌘Z | Undo |
| | ⇧⌘Z | Redo |
| F1 | ⇧F1 | What's this help |

| | | |
|------------|--|--|
| F2 | <i>^F2</i> | Move focus to menu bar |
| F4 | <i>⌘F4</i> | Close window |
| F5 | <i>F5</i> | Refresh |
| F12 | <i>⌘F12</i> | Credits |
| Asterisk | <i>⌘*</i> | RSVP declined |
| Backspace | <i>Backspace</i> | Delete |
| Bracket | <i>⌘[/⌘]</i> | Previous/next table, guest, group in the Floor Plan pane, Table Plan pane, Proximity pane, Table Properties window, Guest Properties window or Group Properties window |
| Comma | <i>⌘,</i> | Preferences |
| Del | <i>Del</i>  | Delete |
| Enter | <i>⌘↵</i> | Properties |
| Escape | <i>Escape</i> | Close window |
| Left/Right | <i>⌘Left arrow/⌘Right arrow</i> | Start/end of line |
| | <i>⌘Left arrow/⌘Right arrow</i> | Select next/previous table in Floor Plan or Table Plan pane |
| Period | <i>⌘.</i> | Globally add/remove "." from titles e.g. "Mr" <-> "Mr." |
| Plus/Minus | <i>⌘+/⌘-</i> | Zoom in/zoom out |

| | | |
|---------------|-----------------------|--|
| Question mark | ⌘? | Context sensitive help |
| Slash | ⌘/ | RSVP accepted |
| Tab | Tab/ ⇧Tab | Next field/previous field |
| Up/Down | ⌘Up arrow/⌘Down arrow | Select next/previous seat in Floor Plan or Table Plan pane |

2.2 Importing

2.2.1 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:

- **CSV (Comma Separated Value)** - A text file that can be produced by Excel (select **File>Save As** and choose .csv as the file type) and many other types of applications. 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 (but less flexible) alternative to importing you can also use the [Quick Add Guests window](#).

See also:

[Import window](#)

[Importing guests from Excel files](#)

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

[Importing guests from vCard files](#)

[Import guests tutorial](#)

2.2.2 Importing guests from Excel files




PerfectTablePlan is only able to import from Excel on Windows. On Mac OS X you need to export to a .csv file before you can import.


[Import guests tutorial](#)

2.2.3 Importing guests from text and 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 **CSV/text 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:

[Importing guests from Excel files](#)

[Quick Add Guests window](#)




[Import guests tutorial](#)



2.2.4 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 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:


[Importing guests from Excel files](#)

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

[Import guest details from the Apple Address Book](#)

2.3 Names and titles


2.3.1 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.

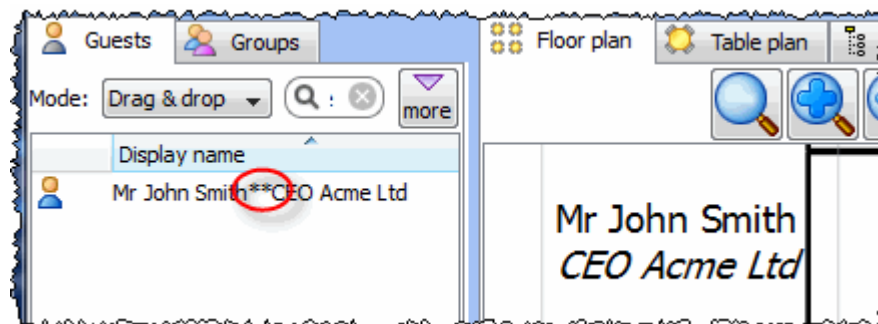
First name is the guest's first (given) name. You can also add middle names here or use initials, if you prefer.


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) if you have enabled the **automatically capitalize names** option in the  **Preferences** window.

Display name can include the guests' qualification, rank, post-nominal titles and/or role, e.g. John Smith OBE, 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](#).

2.4 Groups

2.4.1 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

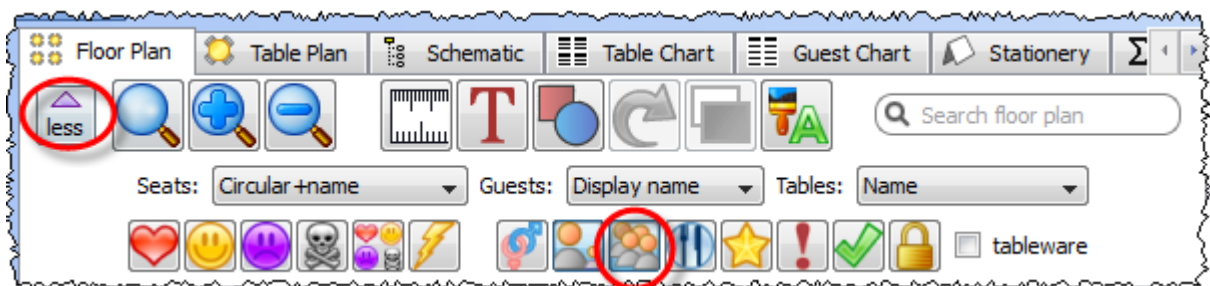
guests are grouped according to their address, e.g. by family or work-place. You can easily reassign guests between groups by dragging them to another group in the 👤 **Groups** pane or using **Edit>Change Group....**

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.



2.5 RSVP status


2.5.1 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  [Report pane](#). You can estimate guest numbers and budget from RSVP status in the  [Numbers and Budget window](#).

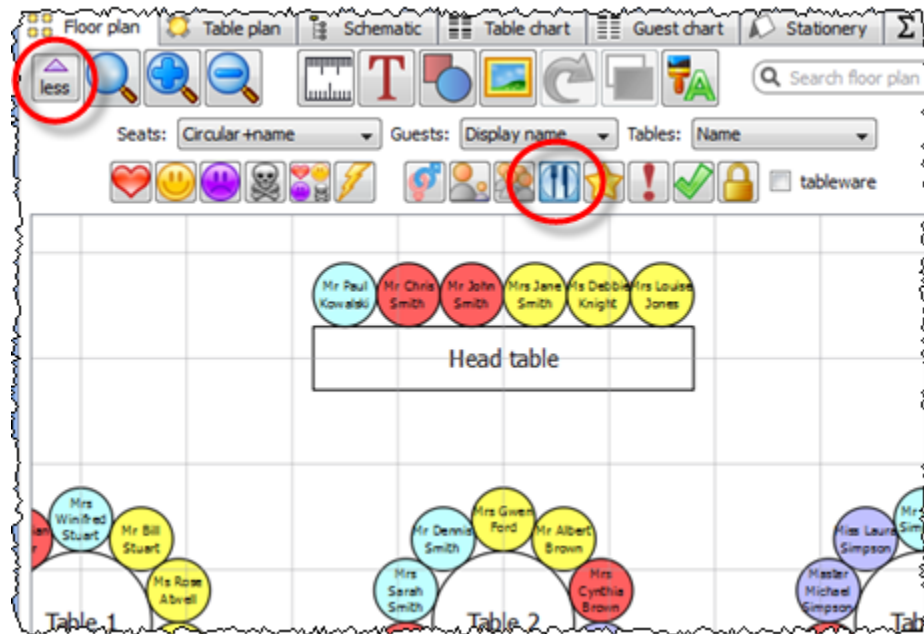
2.6 Meal selection

2.6.1 Meal selection

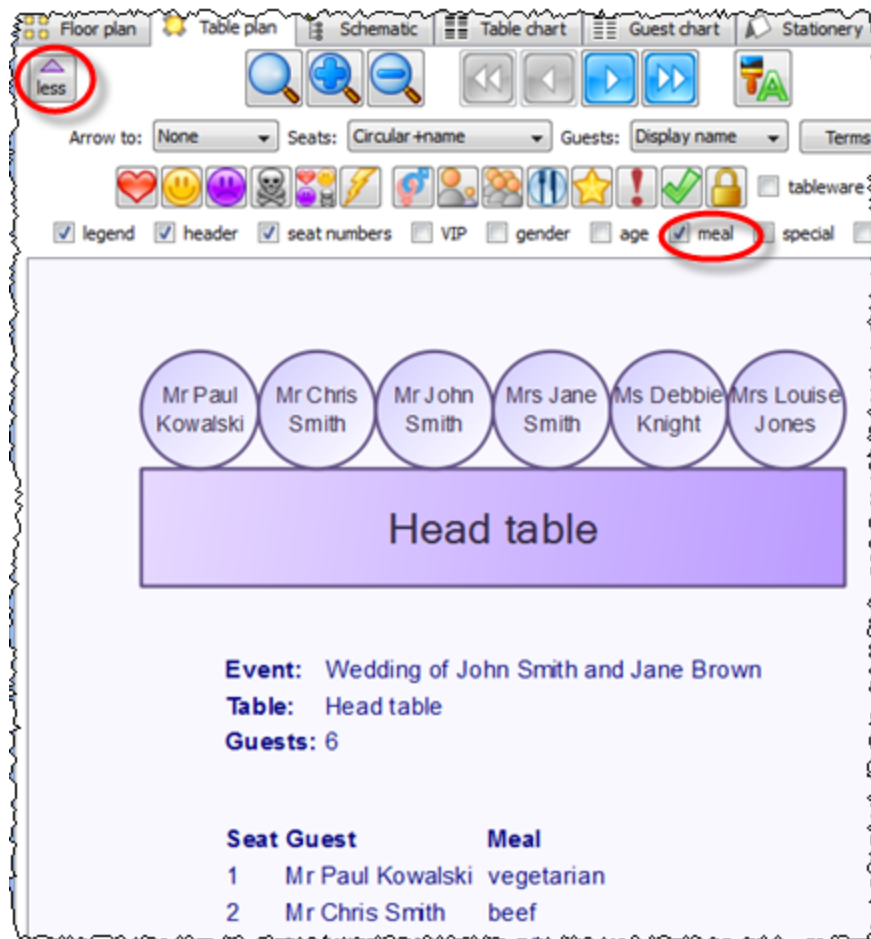
You can record guest meal selections in the **Meal** field of the  [Guest properties window](#). If you have multiple courses you can separate them by commas.

Meal:

Meal selection can be displayed in the  Floor Plan,  Table Plan,  Table Chart,  Guest Chart,  Stationery and  Report panes.



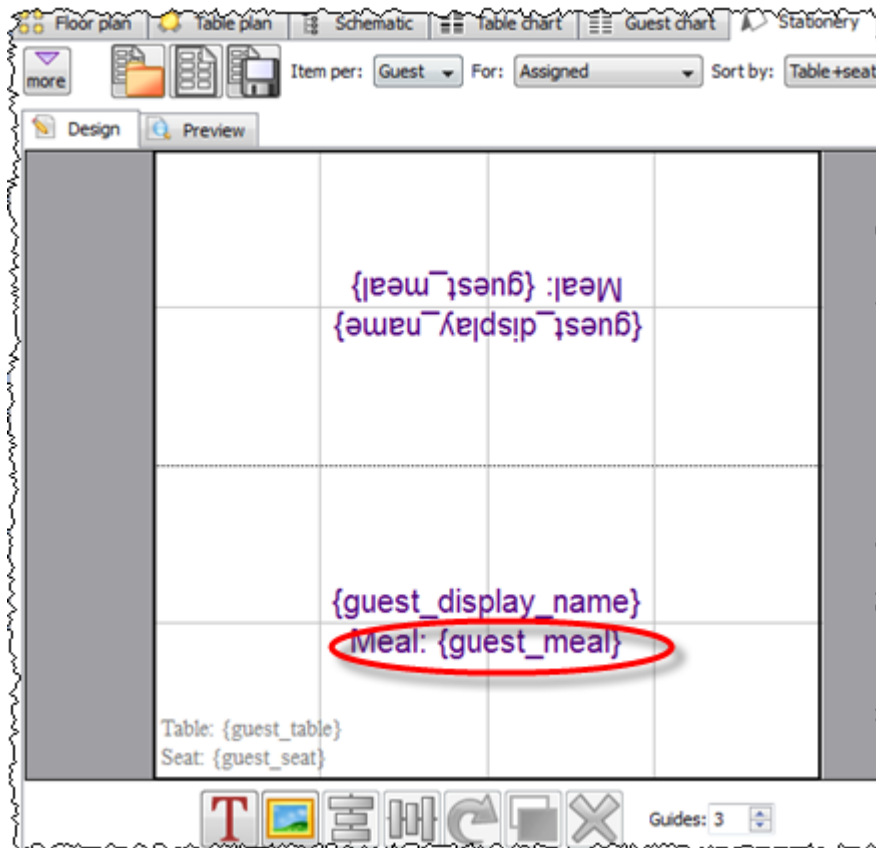
Displaying meal selection by colour in the Floor Plan pane (you can also select Meal from the Guests drop-down list)



Displaying meal selection by colour in the Table Plan pane (you can also click the Meal icon or select Meal from the Guests drop-down list)



Displaying meal selection in the Guest Chart pane



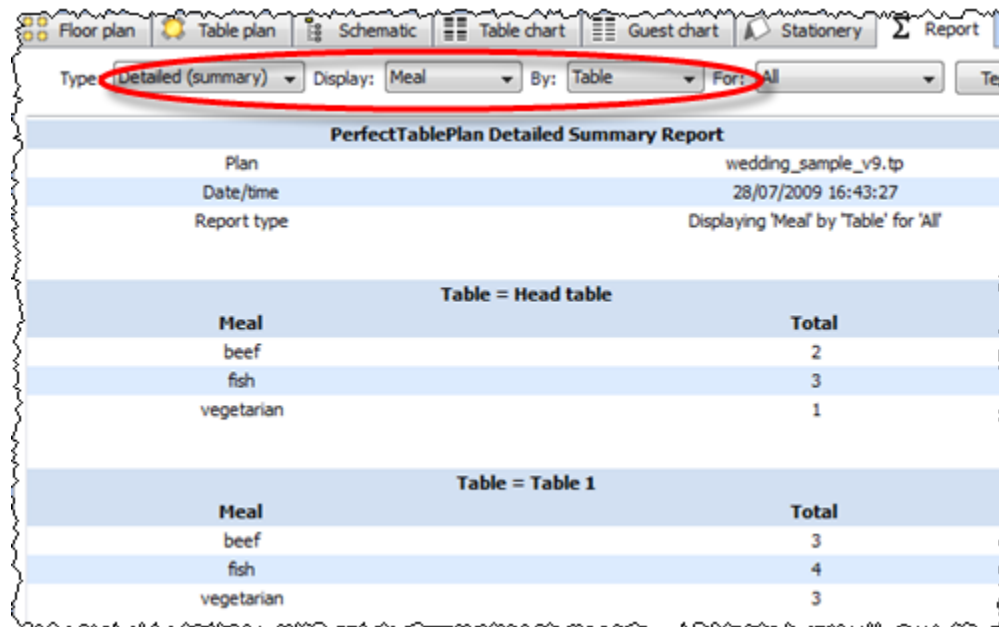
Displaying meal selection in the Stationery pane

| Meal | Accepted | Assigned | Total |
|------------|----------|----------|-------|
| None | 0 | 0 | 2 |
| beef | 18 | 18 | 18 |
| child | 13 | 13 | 13 |
| fish | 19 | 19 | 19 |
| vegetarian | 14 | 14 | 14 |

Summarising meal selections in the Report pane

Professional edition only

You can report meal by table, group or other property in the Σ Report pane.



| PerfectTablePlan Detailed Summary Report | |
|--|--|
| Plan | wedding_sample_v9.tp |
| Date/time | 28/07/2009 16:43:27 |
| Report type | Displaying 'Meal' by 'Table' for 'All' |
| Table = Head table | |
| Meal | Total |
| beef | 2 |
| fish | 3 |
| vegetarian | 1 |
| Table = Table 1 | |
| Meal | Total |
| beef | 3 |
| fish | 4 |
| vegetarian | 3 |

Summarising meal selections by table in the Report pane


If guests have allergies or other special dietary requirements you can record this in the **Special requirements** field.

2.7 Seat assignment

2.7.1 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.

2.7.2 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


[Professional edition only](#)

You can also set proximity [using custom fields](#).

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  Preferences window) |
| ⭐ VIP guest assigned to VIP table | +10 |
| ⭐ VIP guest not assigned to VIP table (if | -10 |



| | |
|--|------|
| there is one) | |
| Guest with no-one sat next to them | -9 |
| Guest not assigned a seat (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.

2.7.3 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
 0000000000000000




So don't be surprised if PerfectTablePlan takes a while to do an automatic assignment for 1000+ guests.



2.8 Copying to the clipboard

2.8.1 Copying to the clipboard

You can copy the contents of the  **Floor Plan**,  **Table Plan**,  **Table Chart**,  **Guest Chart** and  **Report** panes to the clipboard for pasting into other applications (such as Microsoft Excel). 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.

The  **Table Chart**,  **Guest Chart** and  **Report** 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](#)



2.9 Printing

2.9.1 Printing

You can print the contents of the  **Floor Plan**,  **Table Plan**,  **Table Chart**,  **Guest Chart**,  **Stationery** and  **Report** 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.

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](#).

Click on the **Setup** button to change printer settings such as the page size.

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**.

See also:

[Print to poster size](#)

[Print window](#)

[Print Setup window](#)

2.9.2 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
- tickets

- 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:

[Ordering place cards](#)

[Stationery pane](#)

[Print stationery tutorial](#)

2.10 Emailing


2.10.1 Emailing

This feature is not available on the Mac OS X as there is no standard programmatic way of creating an email with an attachment.



2.11 Exporting

2.11.1 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 CSV/text 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 a pane to export to **PDF** to create a [vector image file](#). Select a pane to export to **PNG, JPG or BMP** format to create a [raster image file](#).

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 low 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 image as large as possible** in the  [Preferences window](#).

| Usage | Recommended format |
|--|--------------------|
| Large and/or high quality prints | PDF |
| Outputting to an image for modification in Photoshop/PaintShop/Paint | PNG |
| Small file size/low quality images | JPEG |

text

Select a pane to export to **CSV, text or HTML** to export the appropriate pane as text.

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](#)

2.11.2 Export formats

PerfectTablePlan exports information in 7 major forms:

- **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.

2.12 Back-up files

2.12.1 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)

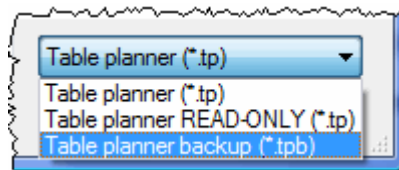
Note Plans with more than 30 guests will only be backed up if you have purchased a licence key.

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.

2.13 Creating a good table plan

2.13.1 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](#).

2.14 Multiple user access

2.14.1 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 available on Mac OS X.

2.15 Integrating with PerfectTablePlan

2.15.1 Integrating with 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 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 if you need help with the format.

[Professional edition only](#)

The Professional edition of PerfectTablePlan associates a unique and unchanging id with each record (e.g. each guest). This can be very useful if you want to write a CSV/XML file, make some changes in PerfectTablePlan and then read back the changes.

2.15.2 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 <code>-import_type evite</code> will match the pre-define type "evite.com export". This argument is ignored if <code>-import</code> is not specified. | -import_type evite |

See also:

[Integrating PerfectTablePlan](#)

2.15.3 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 v4.1.0 or later you should set the version to 8, e.g.:

```
<version value="8"/>
```

Advanced and Professional edition only

<guest_custom_fields>..</guest_custom_fields>

Contains information about custom fields.

The **index** is the 0 based index into data values. E.g. if index is 2 then the data for this field is the third custom data value stored in each guest record.

| Type | Meaning |
|------|----------|
| 0 | Yes/No |
| 1 | Text |
| 2 | Number |
| 3 | Currency |

| | |
|---|-----------|
| 4 | Selection |
| 5 | Tags |

<images>...</images>

The image is encoded in **data** according to **format**, which must be either PNG or JPG.

[Professional edition only](#)

id attribute

Many of the items have an **id** attribute. The id attribute is a globally unique identifier for that item. PerfectTablePlan uses [url encoded GUIDs](#) based on the Random version of the DCE standard (e.g. "{bc7dd14c-f64a-4dc2-83c3-8db1f41d3679}"), but any unique string of characters is permitted. The id will not change, e.g. it will be the same value when exported/saved as it was when first imported/read in.

The id can be very useful if you want to write a PerfectTablePlan XML file from another application, make some edits in PerfectTablePlan and then read the modified information back.

<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 | RSVP Unset |
| 1 | RSVP Accepted |
| 2 | RSVP Sent |
| 3 | RSVP Declined |
| 4 | RSVP 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 |
| 9 | Semi-circular |
| 10 | Oval |
| 11 | Row of seats |

The position of the centre of a table is recorded in metres using attributes "X_metres" and "Y_metres". For backward compatibility you can also set the position of a table in pixels using attributes "X" and "Y", where there are 167 pixels to a metre. The use of pixel measurements is deprecated and may not be supported in future versions.

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.

<selection_filters>..</selection_filters>

This section contains the indexes of guests and groups currently included in the

Selected... list in The **Guest Chart** pane, **Stationery** pane and **Export Data** window.

2.16 Uninstalling

2.16.1 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.

3 How do I?

3.1 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 custom fields](#)

[Add a dance floor, stage etc to the floor plan](#)

[Add a graphic/image/clip-art to the floor plan](#)

[Add a graphic/image/clip-art to the stationery](#)

[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](#)

[Change how seats are displayed](#)

[Change proximity for multiple guests](#)

[Change table size or shape](#)

[Change text inside panes](#)

[Change the print pagination](#)

[Change the printer paper size](#)

[Change the size of the room](#)

[Change the table order](#)

[Choose a format to export to](#)

[Copy guests from one plan to another](#)

[Create address labels](#)

[Create a non-rectangular room](#)

[Create a template floor plan](#)

[Create an E-shaped table](#)

[Customise standard guest titles](#)

[Email my plan](#)

[Estimate numbers and budget](#)

[Export a chart to Excel/Word](#)

[Export guest and seating data to Excel](#)

[Export to PDF format](#)

[Handle guests with unknown names](#)

[Handle multiple rooms](#)

[Handle post-nominal titles](#)

[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](#)

[Import seating data](#)

[Insert a new guest into an existing group](#)

[Liaise with caterers](#)

[Load sample stationery](#)

[Lock guests to seats](#)

[Move guests from one group to another](#)

[Only assign guests who have accepted](#)

[Order place cards](#)

[Print a guest list](#)

[Print invitations, place cards, badges, labels etc](#)

[Print legible plans on a small format printer](#)

[Print to poster size](#)

[Remove stationery border or fold line](#)

[Rename a table](#)

[Retrieve old versions of the plan](#)

[Select multiple items](#)

[Set the RSVP status for multiple guests](#)

[Show gender](#)

[Show groups](#)

[Show meals](#)

[Show the proximity for one group at a time](#)

[Show unassigned seats](#)

[Show VIP/Special/RSVP/locked](#)

[Track details of non-seated guests](#)

[Turn off guest name capitalisation](#)

[Turn the floor plan grid on/off](#)

[Use and image of the venue](#)

[Zoom in/out of the floor plan](#)

3.2 Assigning seats

3.2.1 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](#).

3.2.2 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.

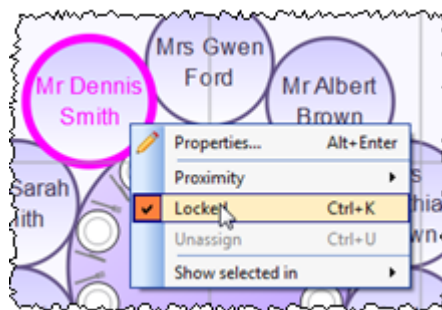
Note If you have guests you don't want moved you can lock them to their seat.

3.2.3 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.

3.2.4 Only assign guests who have accepted


To assign to seats only those guests who have accepted your invitation:

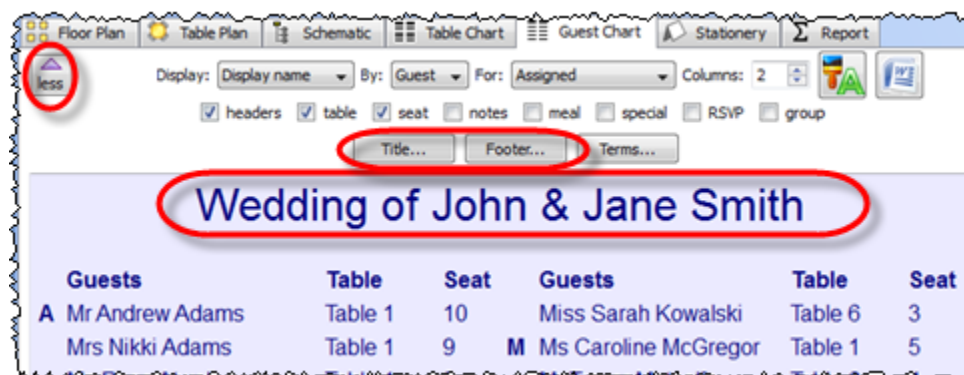
1. Select **Edit>Preferences**. The  [Preferences window](#) will be displayed.
2. Select **Accepted** in the **Allow seat assignment with RSVP** drop-down menu.
3. Click **OK**.
4. If you have unaccepted guests assigned you will have the option to unassign them. Click **Unassign**.
5. If you have unassigned guests select **File>**  **Auto Assign Seats**. Only guests who have accepted will be assigned to seats.

3.3 Charts

3.3.1 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**.



3.4 Exporting





3.4.1 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 (but not printing), 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](#).


3.4.2 Export a chart to Excel/Word

To export the contents of the Guest Chart, Table Chart or Report pane to Microsoft Excel or Word:

1. Bring the Guest Chart , Table Chart or Report pane to the front.
2. Select **Edit>** Copy from the menu bar (not **⌘+C**, this only copies selected text).
3. Start Excel/Word.
4. Select **Edit>Paste** in Excel/Word.

3.4.3 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.

3.4.4 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 the 🏠**Floor Plan**, 📊**Table Chart**, 📋**Guest Chart** or 📄**Stationery** pane to poster size. 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 Mac OS X, you don't need to install any additional software.

1. Select **File**>🖨️**Print**, the PerfectTablePlan 🖨️**Print** window will appear.
2. Click the **Setup...** button, the Mac OS X Print window will appear.
3. Drag the PDF button down to **Save as PDF....**



4. Choose a location for the file in the **Save** window and click Save, the **Print Setup** window will appear.
 5. Choose the print setup and click **OK**.
 6. 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.

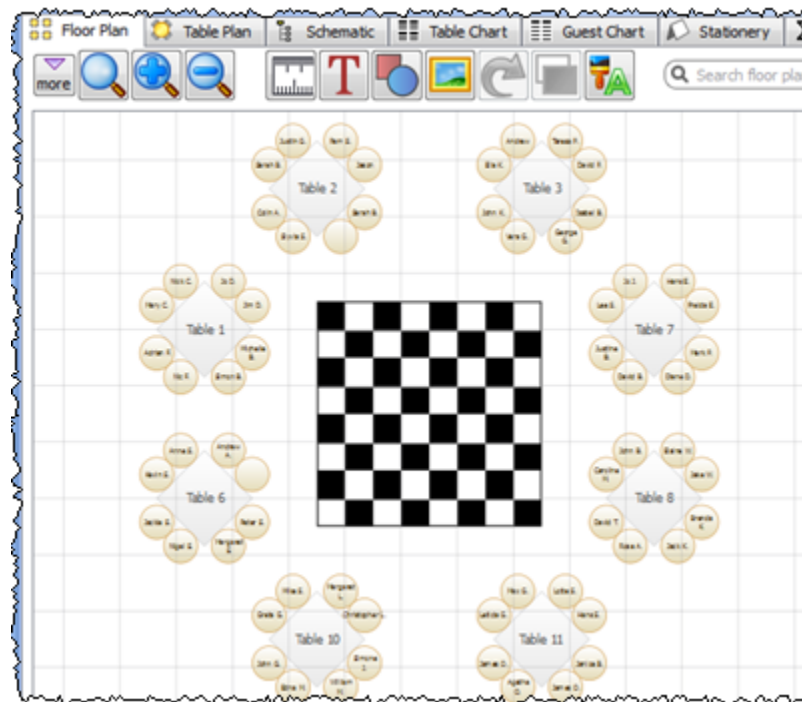
3.5 Floor plan

3.5.1 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.


[Advanced and Professional edition only](#)




You can [add images to the floor plan](#). We install a few clip-art images with PerfectTablePlan, including a checkerboard dance floor.

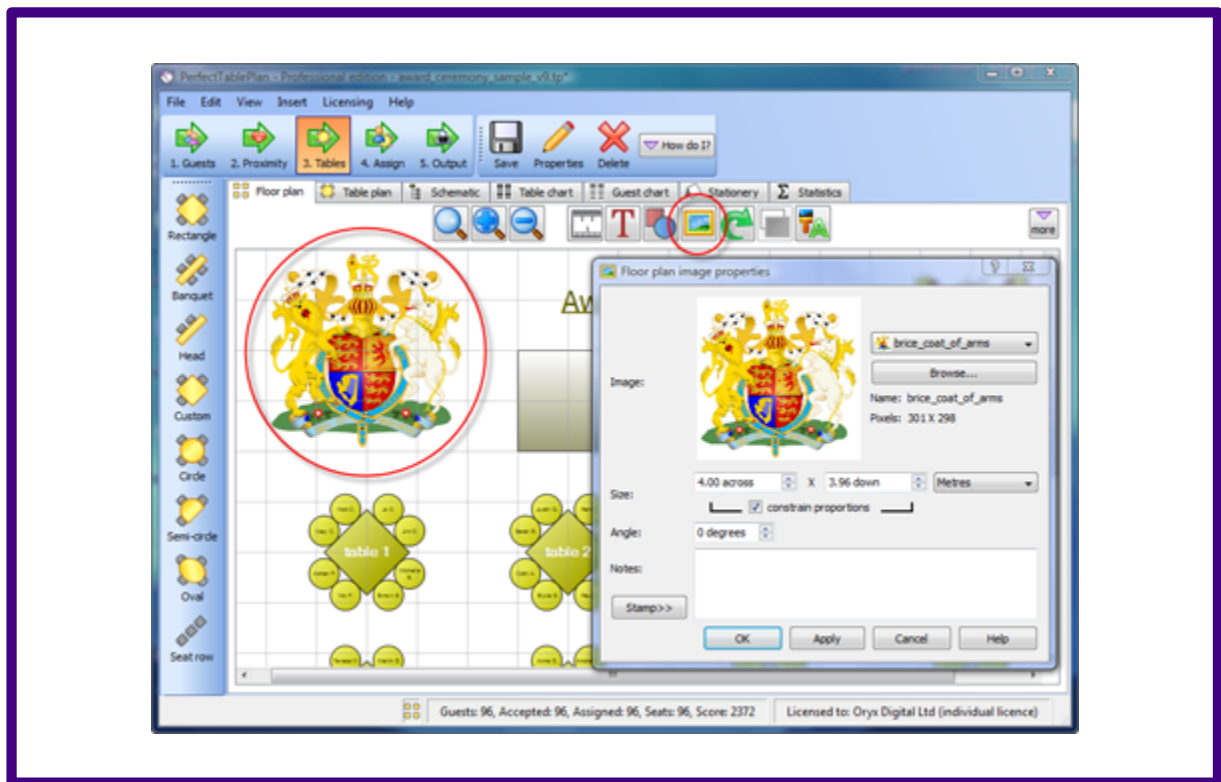


3.5.2 Add a graphic/image/clip-art to the floor plan

Advanced and Professional edition only

To add an image to the  **Floor plan** pane:

1. Click on the  **Insert Image** button at the top of the  **Floor plan** pane. The  **Insert Image** window will appear.
2. Click on the **Browse...** button and select an image file.
3. Set the image **Size** on the floor plan.
4. Click **Add**.
5. Click on the image and drag it to the appropriate position.




Floor plan images are not available in the Home edition of PerfectTablePlan. As a workaround you can always pass the plan through a printer twice and use other software to add the graphics/logo on the second pass.

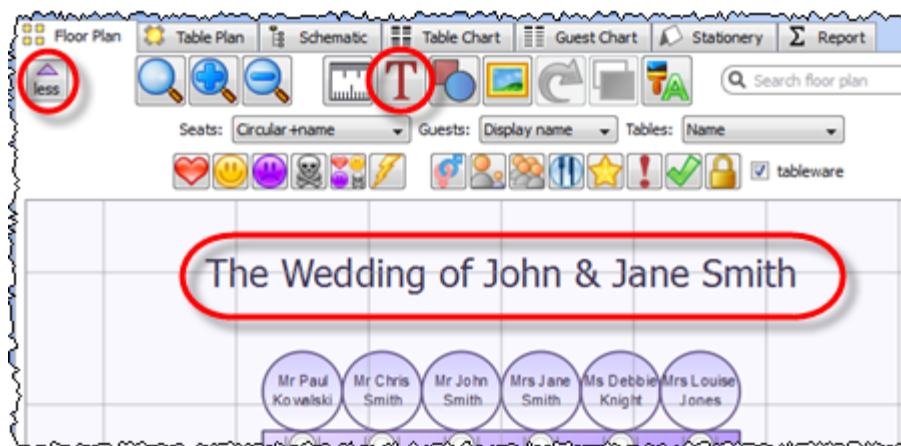
See also:

[Use an image of the venue](#)

3.5.3 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.

3.5.4 Change how guest names are displayed

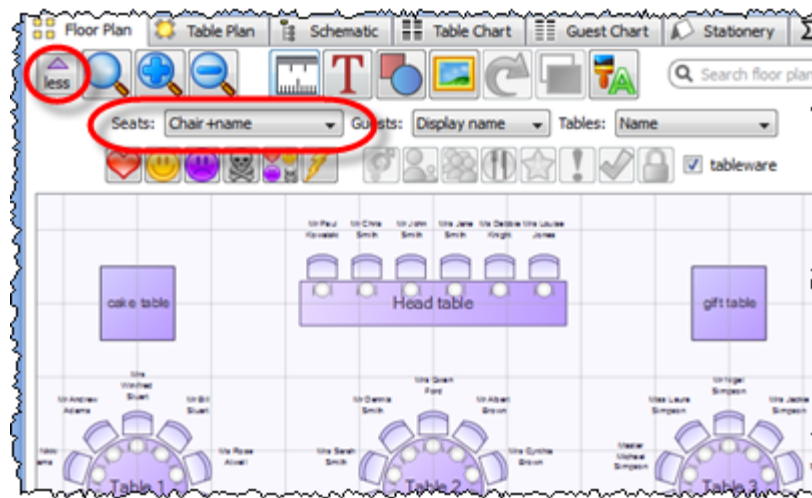
To change how the names of guests are displayed in the 🏠Floor plan and 📅Table plan panes:

1. Click the 📄 button at the top right of the pane.
2. Select the appropriate entry from the **Guests** drop-down list.

3.5.5 Change how seats are displayed



To change how seats are displayed in the 🏠Floor plan and 📅Table plan panes:

1. Click the 📄 button at the top right of the pane.
2. Select the appropriate entry from the **Seats** drop-down list.





3.5.6 Change the size of the room

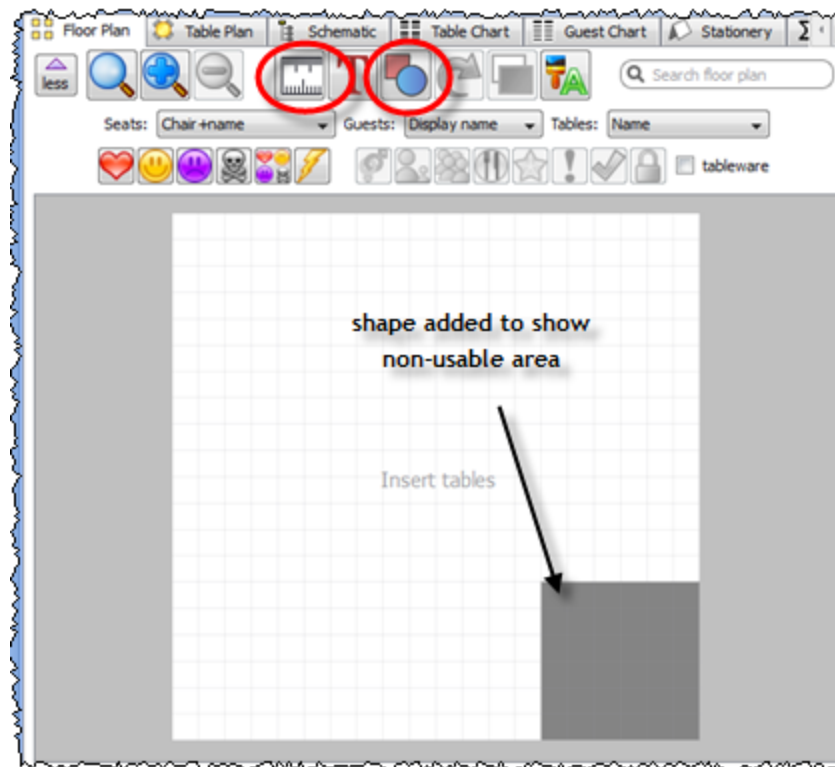
To change the size of the floor plan:

1. Click on the  **Dimensions** button at the top of the  **Floor Plan** pane.
2. Set the **Size across** and **down** of the room in the appropriate **Units**.
3. Click **OK**.

3.5.7 Create a non-rectangular room

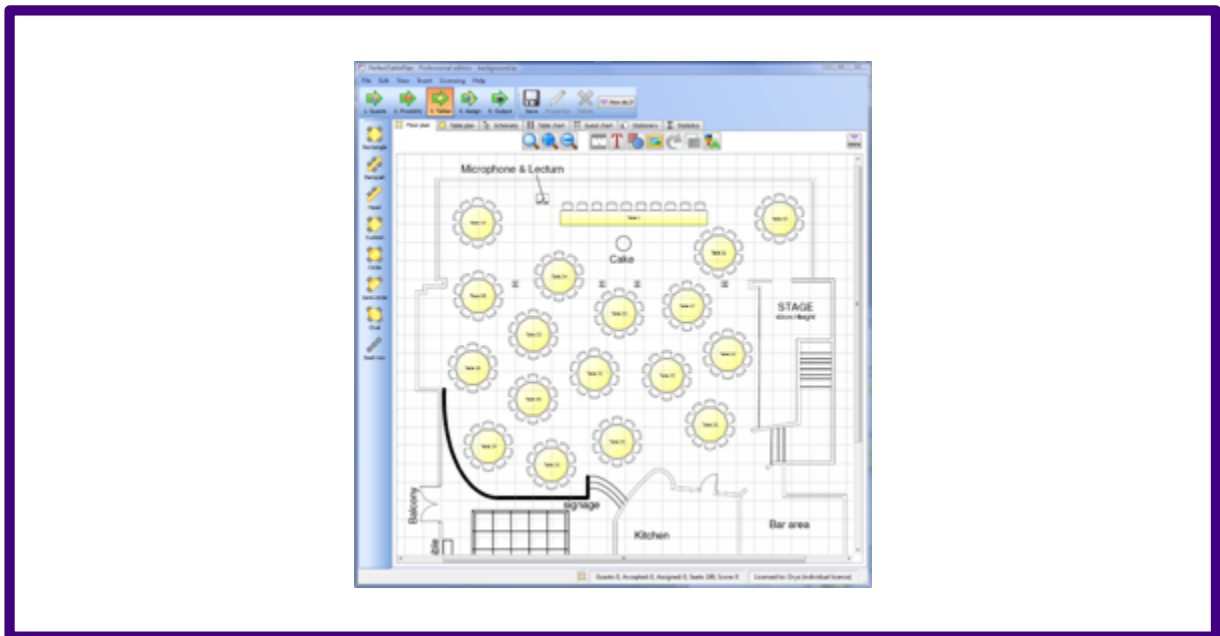
To create a non-rectangular room (e.g. 'T' shaped or 'L' shaped):

1. Click the  **Dimensions** icon at the top of the **Floor Plan** pane.
2. Set **Size across** and **down** to the maximum dimensions of the room and click **OK**.
3. Click the  **Insert shape** icon at the top of the **Floor Plan** pane.
4. Create a shape equal to the same size as an unusable area of the room, set it to the same colour as the outside of the floor plan and click **OK**.
5. Drag the shape to the appropriate position.
6. Repeat 3, 4 and 5 as necessary.



Advanced and Professional edition only

If you have a scale image of the venue you can [use this as the background to the floor plan](#).



3.5.8 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:

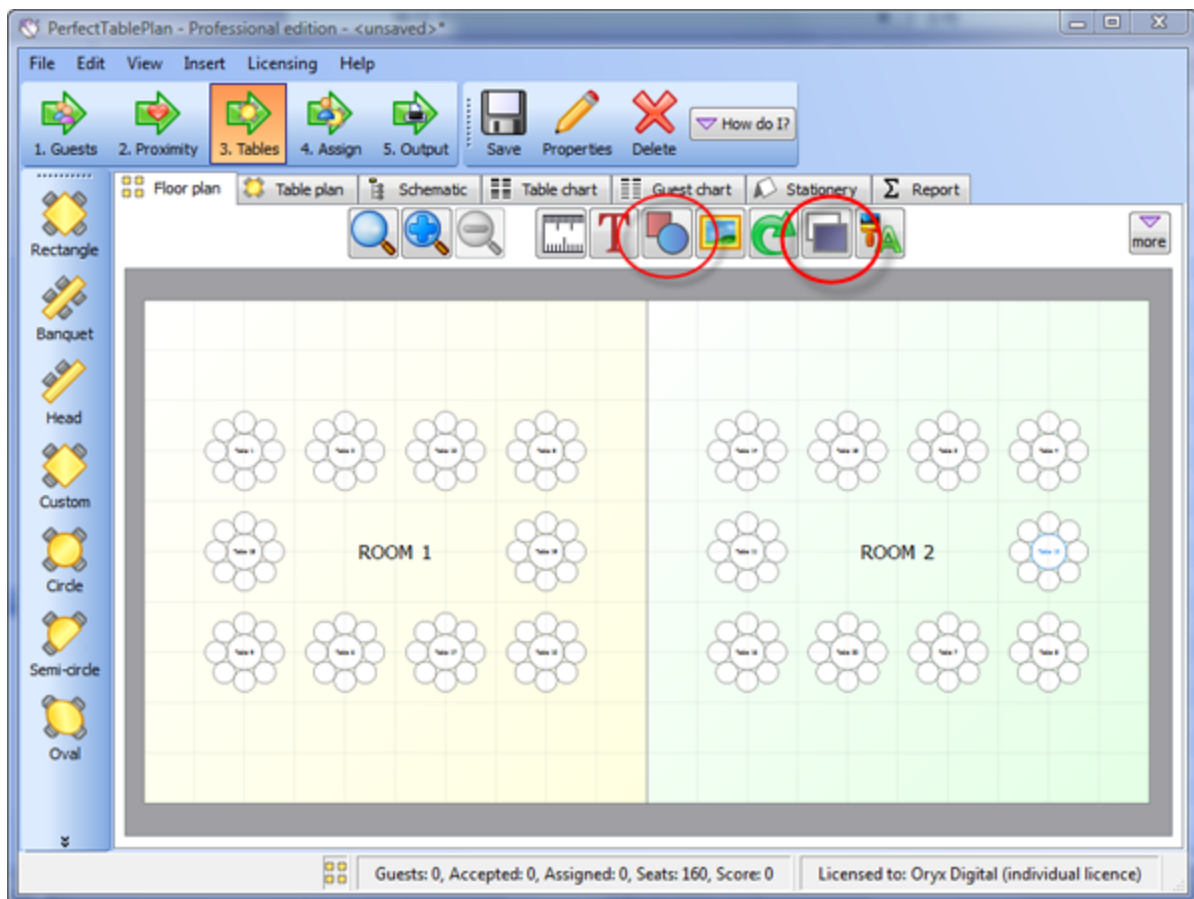
[Copy guests from one plan to another](#)

3.5.9 Handle multiple rooms

If you have multiple rooms you can simulate this by adding an appropriately sized rectangle shape to the floor plan for each room.



1. Click on the  **Dimensions** button to change the floor plan size.
2. Click on the  **Insert shape** button to add shapes to the floor plan.
3. Click on the  **Move to Back** button to move the rectangle shape behind any tables.

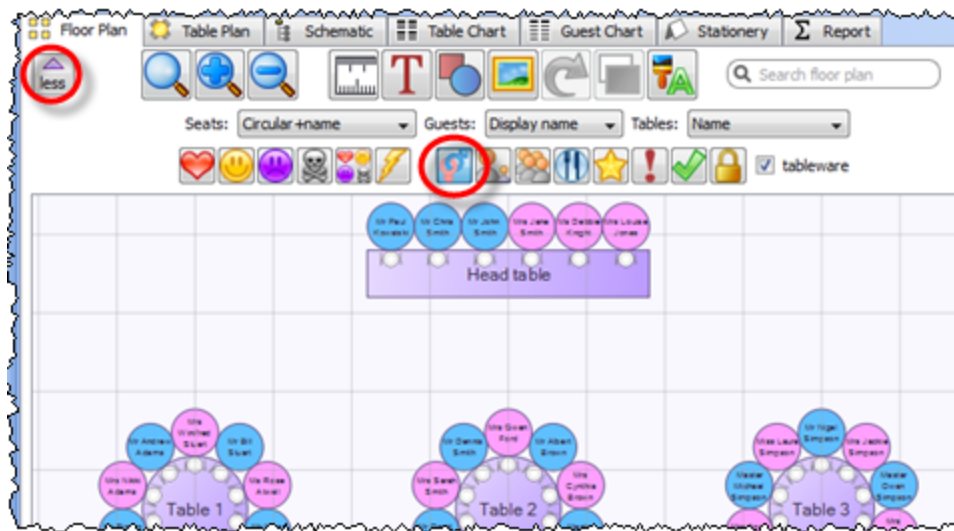
Setting each room to a different colour may be a useful visual cue.



3.5.10 Show gender

To show gender in the  **Floor Plan** or  **Table Plan** pane:

1. Click on the  button at the top-left of the pane.
2. Click on the  **Gender** button. Males will be shown in blue and females in pink.

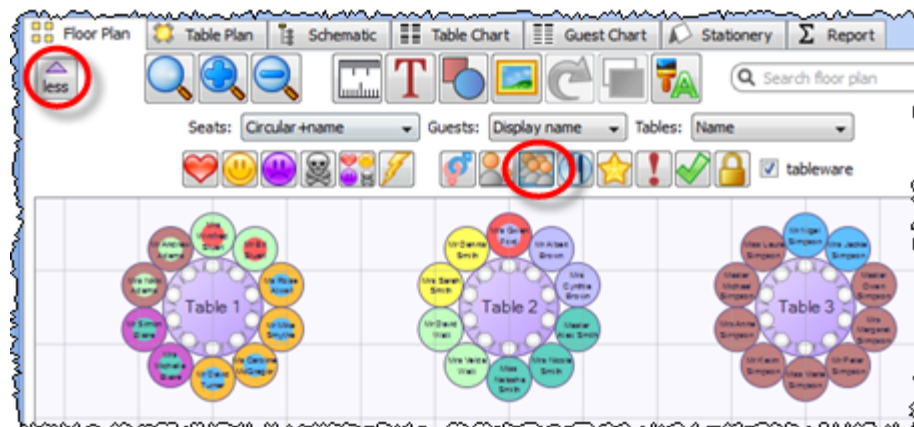


Note This option is only available if you are [displaying circular seats](#).

3.5.11 Show groups

To show groups in the **Floor Plan** or **Table Plan** pane:

1. Click on the button at the top-left 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.



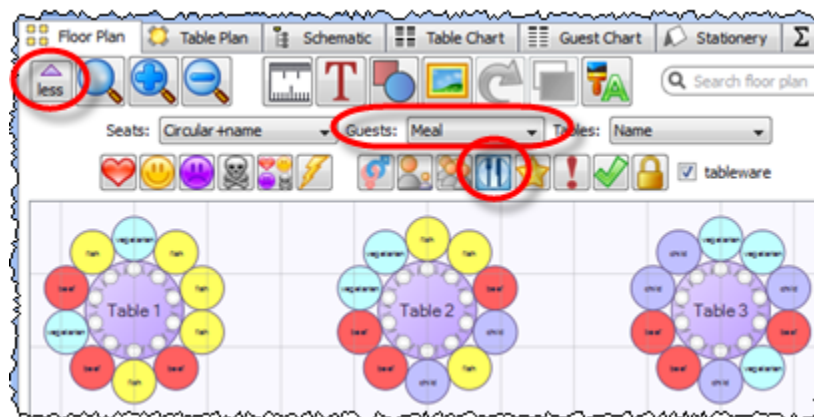
Note This option is only available if you are [displaying circular seats](#).

3.5.12 Show meals

To show meal selection in the 🍽️ **Floor Plan** or 📋 **Table Plan** pane:

1. Click on the 📏 button at the top-left of the pane.
2. Click on the 🍽️ **Meals** button. Each meal will be shown in a different colour (or combination of colours if you have multiple courses separated by commas). You cannot change the colours.

You can also set the **Guests** drop-down list to **Meal**.

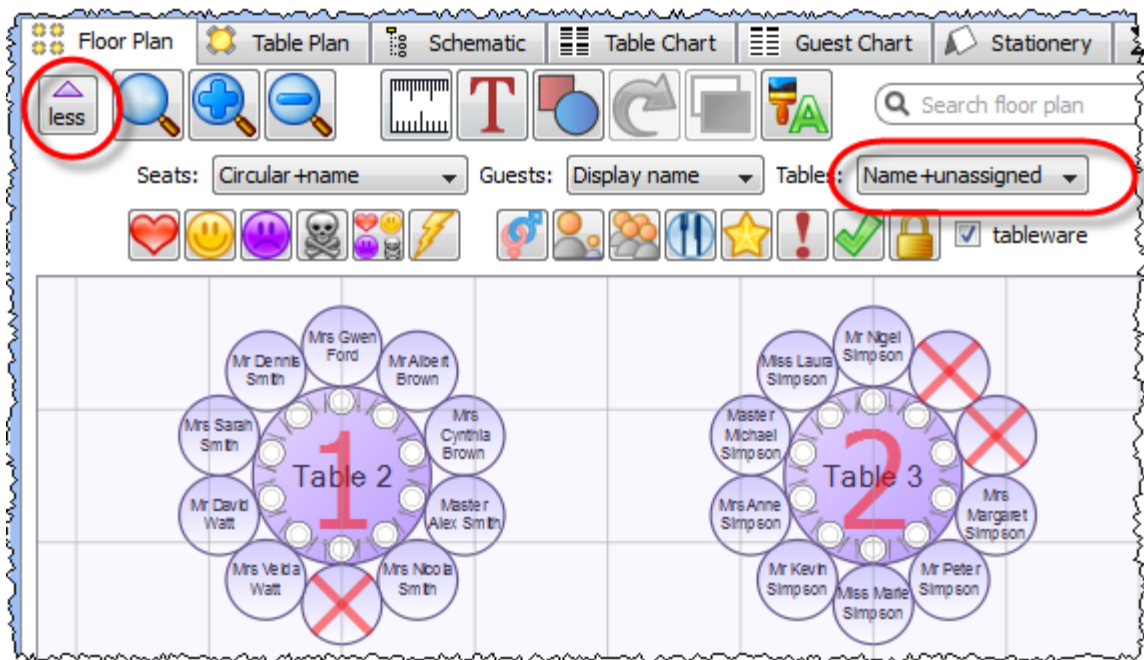


Note This option is only available if you are [displaying circular seats](#).

3.5.13 Show unassigned seats

To show unassigned seats in the 🍽️ **Floor Plan** or 📋 **Table Plan** pane:

1. Click on the 📏 button at the top-left 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.



3.5.14 Show VIP/Special/RSVP/locked

To show VIP/Special/RSVP/locked status in the Floor Plan or Table Plan pane:




1. Click on the button at the top-left of the pane.
2. Click on the appropriate button.



Note This option is only available if you are [displaying circular seats](#).

3.5.15 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](#)

3.5.16 Use an image of the venue

[Advanced and Professional edition only](#)

If you have a scale image of the venue you can use it as the background to your floor plan. This can save you a lot of time drawing walls, doors and other features.

1. Click on the  **Dimensions** button at the top of the  **Floor plan** pane. The  **Dimensions** window will appear.
2. Click on the **Browse...** button and select an image file.
3. Set the **Background image size** to the size of the image. It is important you get this correct or the floor plan won't be to scale.

4. Click OK.

5. You can now place tables and other floor plan items on top of the floor plan image.



scaled floor plan image

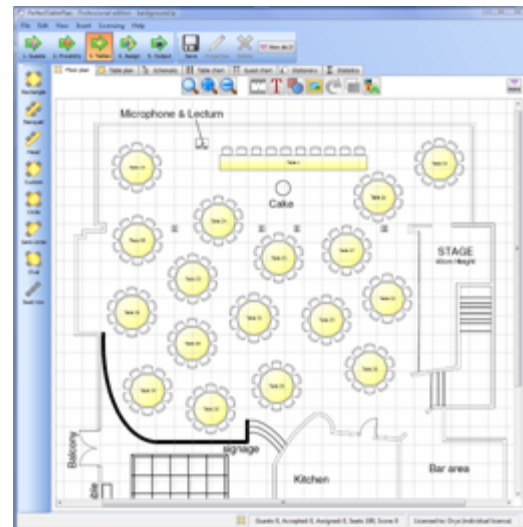


image used as floor plan background with tables added

3.5.17 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.

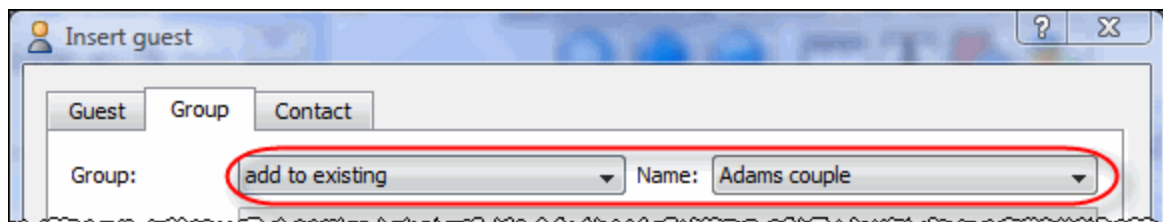
You can also zoom and pan using the wheel on your mouse (if you have one) depending on the **Floor/Table Plan** pane mouse wheel behaviour settings in the [Preferences window](#).

3.6 Groups


3.6.1 Insert a new guest into an existing group

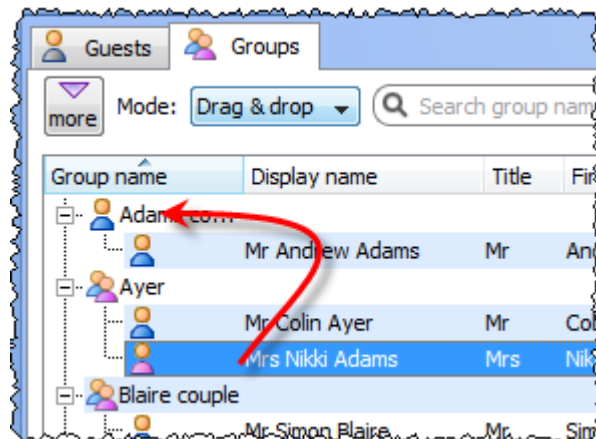
To add a guest to an existing group:

1. Select **Insert>Single Guest**, the **Insert Guest** window will appear.
2. Choose **Add to existing** from the **Group** drop-down list in the **Group** tab.



3.6.2 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**.



3.7 Guests

3.7.1 Add custom fields

[Advanced and Professional edition only](#)


Sometimes you need to record information about a guest that does not fit into the standard fields. You can use a custom field to do this. To add a custom field:

1. Select **Edit>Custom fields...**
2. Click the **+Add** button.
3. Select the **Type** (+Allowed values for selection type) and **Default value**.
4. Click **OK**.

Custom fields are fully integrated into PerfectTablePlan. For more information see the [Custom fields window](#).

3.7.2 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](#).

3.7.3 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 Mac OS X 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](#)

3.7.4 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](#).

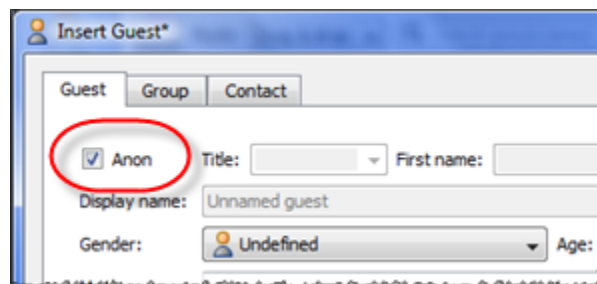
2. Select the **Titles** tab.
3. Click on **+Add**.
4. Type a name and select a default gender, age and VIP status.
5. Click **OK**.

Titles in your current plan can be imported by clicking on **Import from current plan**.

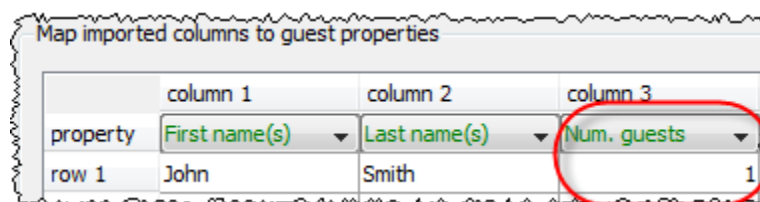
You may also wish to set the **Default couple** titles.

3.7.5 Handle guests with unknown names

If you don't know the name of a guest you can just check the **Anon** check box. A name will then be created for them automatically, based on their group name.

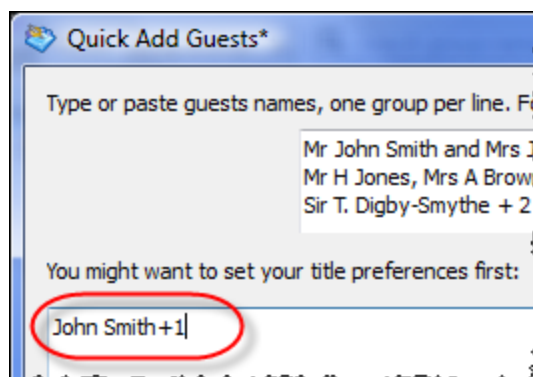


Or you can import anonymous guests using a **Num. guests** column in the [Import Data window](#):



| | column 1 | column 2 | column 3 |
|----------|---------------|--------------|-------------|
| property | First name(s) | Last name(s) | Num. guests |
| row 1 | John | Smith | 1 |

Or use "+n" in the [Quick Add Guests window](#):



You can uncheck the **Anon** box and add their name if you find it out later.

3.7.6 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](#).

3.7.7 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.

3.7.8 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".

3.7.9 Turn on/off guest name capitalisation



To turn on/off the automatic capitalisation of names check/uncheck **automatically capitalise names** in the **General** tab of the  [Preferences window](#).

3.8 Importing



3.8.1 Import guest details from Apple Address Book

To import guests from Apple Address Book to PerfectTablePlan:

Mac OS X 10.3.9 or Mac OS X 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

Mac OS X 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.

3.8.2 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 [Importing guests from Excel files](#).

3.8.3 Import guest details from Outlook

Outlook is not available on Mac OS X.

3.8.4 Import guest details from Outlook Express

Outlook is not available on Mac OS X.

3.8.5 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](#).

| | 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 |

3.8.6 Import seating data

[Professional edition only](#)

To import seating data:

1. Add tables with the appropriate names and numbers of seats to your plan.

2. Select **File>Import**.
3. Choose **Excel/CSV/text file**.
4. Click **OK**.
5. Select a file to import. The **Import Data** window will appear.
6. Set guest name and other columns as usual.
7. Set the **Table/Row name** column.
8. Optionally set the **Seat number** column.
9. Click **OK**.

| | column 1 | column 2 | column 3 |
|----------|---------------|----------------|-------------|
| property | Full name(s) | Table/Row name | Seat number |
| row 1 | Mr John Smith | table 1 | 1 |
| row 2 | Mrs Jo Brown | table 2 | 5 |


Note:

- You must create tables with the appropriate names and numbers of seats before you import guests (the names of tables are not case sensitive).
- If the table cell is left blank the guest will not be assigned a seat.
- Seats are numbered from 1 and proceed clockwise. If you specify just the table or the seat cell is left blank, the guest will be assigned to the first empty seat, starting with seat 1 and proceeding clockwise. Guests will not be assigned to seats that are already assigned.
- If **Allow seat assignment with RSVP** is not set to **Any** in the **Preferences** window you will need to set the RSVP status of any guests to be assigned seats to 'Accepted' during import or they cannot be assigned seats.

3.9 Plans

3.9.1 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.


3.9.2 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.

3.10 Printing


3.10.1 Change the printer paper size

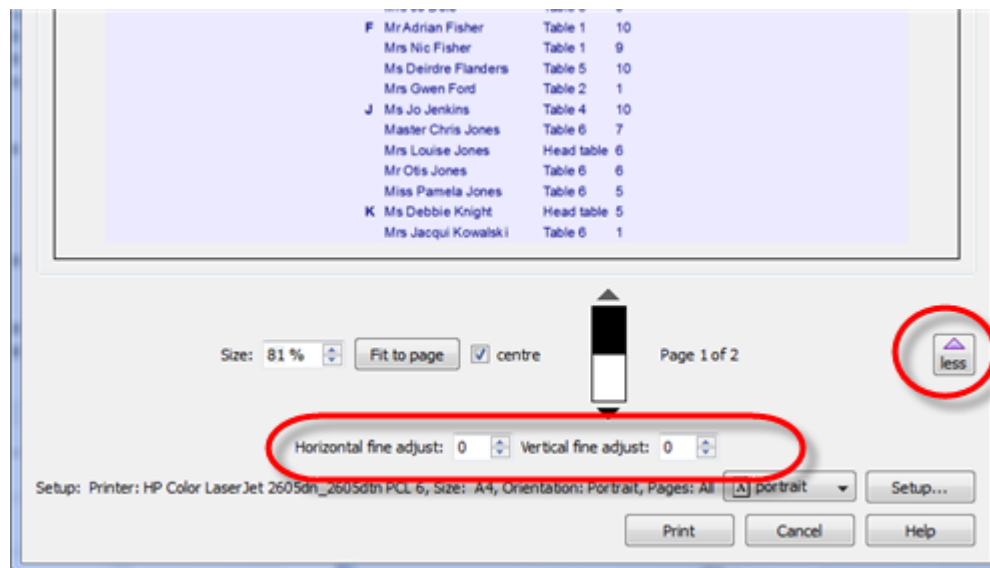
PerfectTablePlan can print to any size of paper that your printer supports. To change the paper size:

1. Select **File>Print Setup** (or the **Setup** button in the  [Print window](#)).
2. The **Print Setup** window will appear.
3. If you have more than one printer, select the printer.
4. Select your paper size. The user interface for the **Print Setup** window varies between different operating systems and printers.

5. You can now print to the new paper size.



3.10.2 Change the print pagination



Use the fine adjust controls in the **Print** window. Click on the  button to show them.



3.10.3 Print a guest list


To print a list of all the guests (including unassigned guests):


1. Bring the  **Guest Chart** pane to the front of the **Top** pane.
2. Select **All** from the **For** drop-down list at the top of the pane.
3. Select **File** >  **Print** or the equivalent **Main** tool bar button.










Note You can't print the  **Guests** pane. However you can print the  **Guest Chart** pane and it contains very similar information.

3.10.4 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

(change the **Size %** in the  [Print window](#) to span your printout across multiple pages).

- 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)** or **Name only (banquet)** 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 (but may stop the floor plan being to scale).
- 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.

Alternatively:

- [Export the floor plan as a PDF](#) and send it to someone with a larger format (e.g. A3 or A2) printer.
- [Order a digital poster print](#) from one of our partners.

3.10.5 Print to poster size


To print a plan or chart to poster size:

- Print across multiple sheets of A4/Letter paper and join them together; or
- Export to [PDF format](#) and take it to your local print shop, e.g. a Fedex Kinko ([raster image formats](#) such as PNG and JPG can degrade significantly when enlarged); or
- Get it [delivered to your door as an inexpensive digital poster print](#).



3.11 Proximity

3.11.1 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.

3.11.2 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-left of the pane.
2. Set the **Shown** drop-down list to **by group**. Use the ◀ and ▶ buttons or the drop-down list to change group.

See also:




[Proximity pane](#)

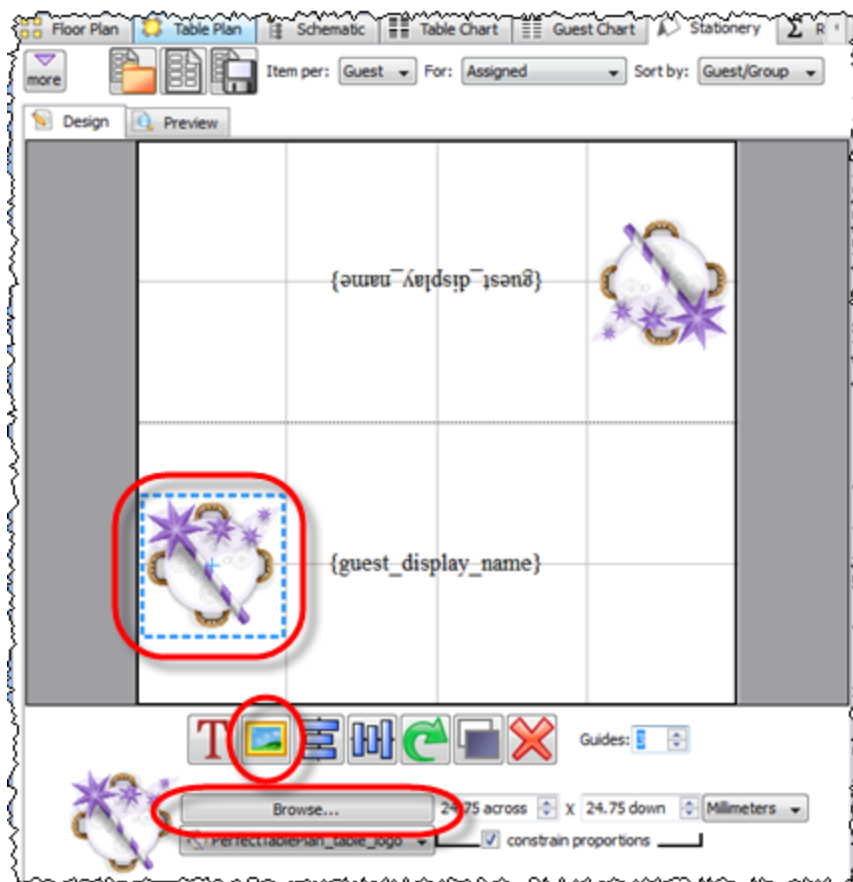
3.12 Stationery

3.12.1 Add a graphic/image/clip-art to the stationery

[Advanced and Professional edition only](#)

To add an image to the  **Stationery** pane:




1. Ensure that the  **Design** tab is at the front.
2. Click on the  **Insert Image** button at the bottom of the  **Stationery** pane.
3. Click on the **Browse...** button and select an image file.
4. Set the image **across** and **down** size.
5. Click on the image and drag it to the appropriate position.

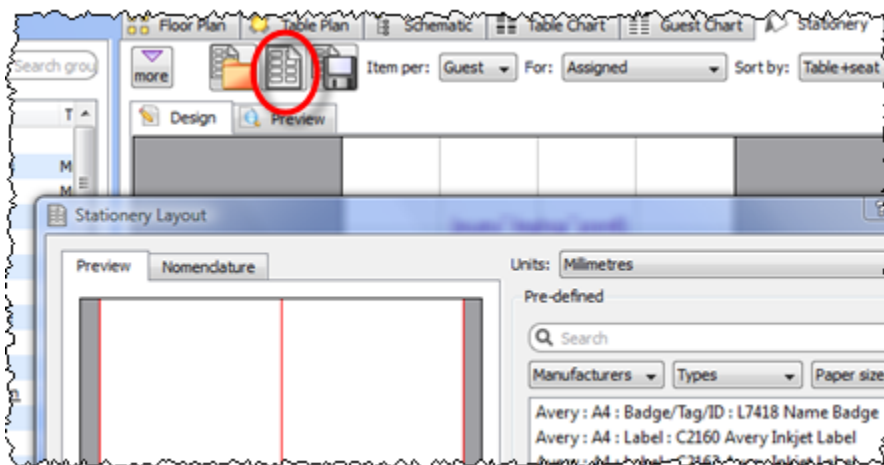


Stationery images are not available in the Home edition of PerfectTablePlan. As a workaround you can always pass the stationery through a printer twice and use other software to add the graphics/logo on the second pass.

3.12.2 Add a new stationery layout

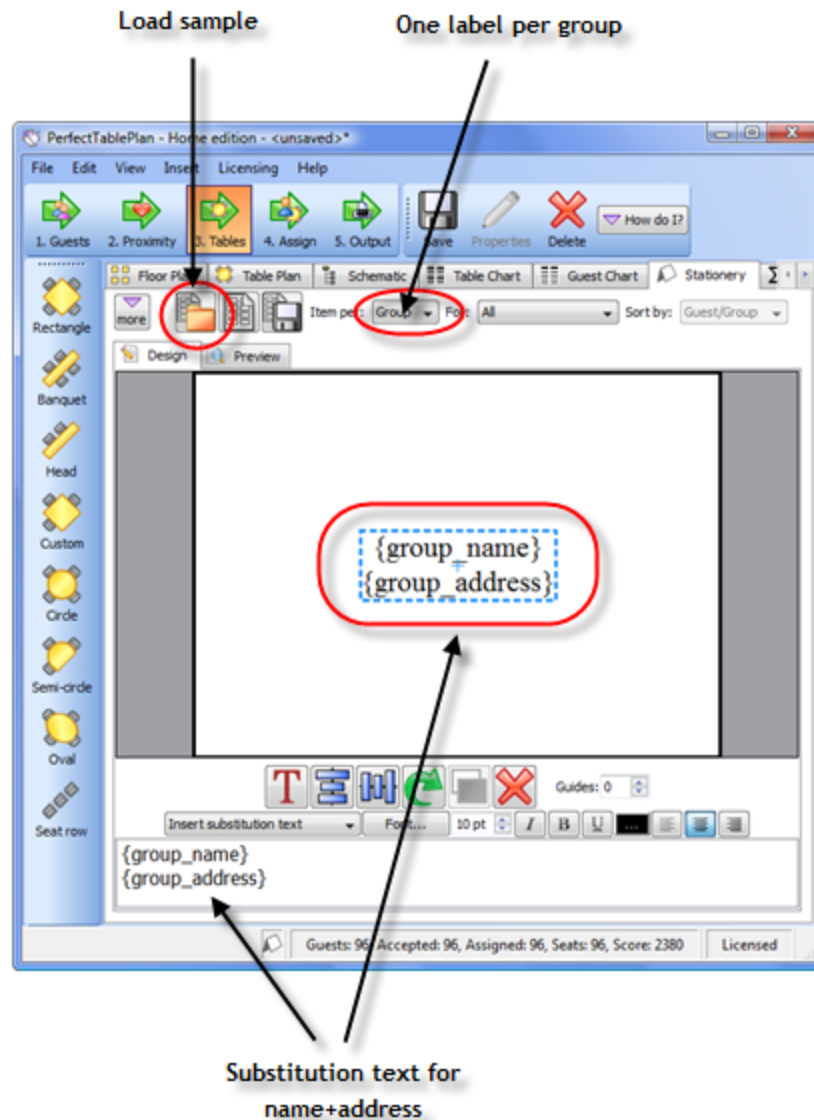
PerfectTablePlan comes with a comprehensive library of stationery templates. This includes many sizes of labels and cards from leading stationery manufacturers. If we don't provide a template for the type of stationery you want to use:

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.



3.12.3 Create address labels

If you have completed the contact information for each group you print an address label for each group. We also include A4 and Letter address label templates with PerfectTablePlan.



3.12.4 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 Mac OS X you may have dragged them from the disk image file to your Documents folder.

There are also some [templates for popular place cards](#) on our website.

3.12.5 Order place cards

You can order sheets of press-out place cards suitable for printing from PerfectTablePlan from our partners. [Click here for details](#).

3.12.6 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.

You can also [load sample stationery](#) we install with the software.



Stationery can be exported to a PDF file to send your printer.


For details see the [Printing Stationery tutorial](#).

See also:

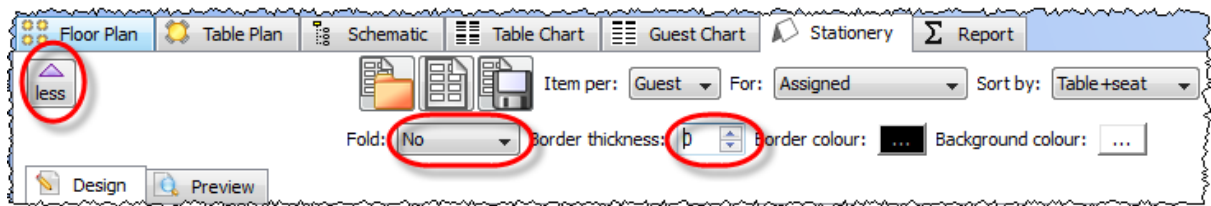
[Order place cards](#)

[Printing stationery](#)

3.12.7 Remove stationery border or foldline

Click on the  button at the top-left of the pane.

- To remove the border from stationery set the **Border thickness** to **0**.
- To remove the fold lines from stationery set **Fold** to **No**.



3.13 Tables

3.13.1 Change table size or shape

To change the size (dimension or number of seats) or shape of a table:

1. Double-click on the table in the **Floor Plan**, **Table Plan** or **Schematic** pane.
2. Change the size or shape properties, as required.
3. Click **OK**.

3.13.2 Change the table order

The **Table Plan**, **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-left of the **Table Chart** pane).
2. Click on the **Table order...** button.
4. Click the **Sort** button.

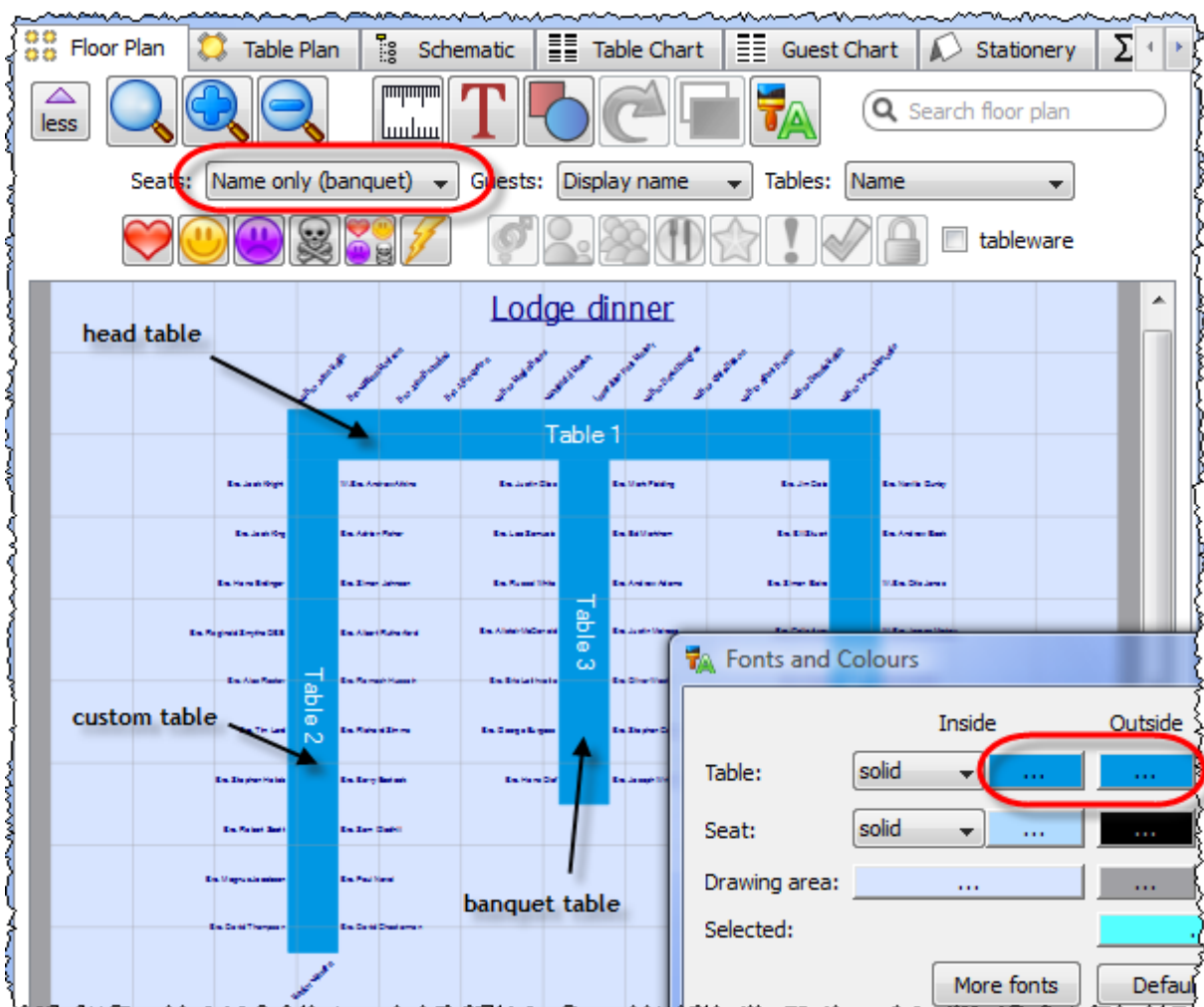
5. Click OK.

3.13.3 Create an E-shaped table


You can create an E-shaped table (and other complex tables types) by composing it from basic tables shapes.

Typically you will use a head table plus a banquet table for each 'sprig'. If you need to add guests at the end of the banquet tables you can use custom tables instead.

See the Masonic sample table plan shipped with PerfectTablePlan for an example of an E-shaped table plan.








Hints:

- Set the **Inside** and **Outside** colours of the tables the same in the  [Fonts and Colours window](#) so that you won't see where the tables overlap.
- Set the **Seats** drop-down list at the top of the **Floor Plan** pane to **Name only banquet** for a name layout that is easy to read and makes good use of space.


3.13.4 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

3.14 Other


3.14.1 Change fonts and/or colours

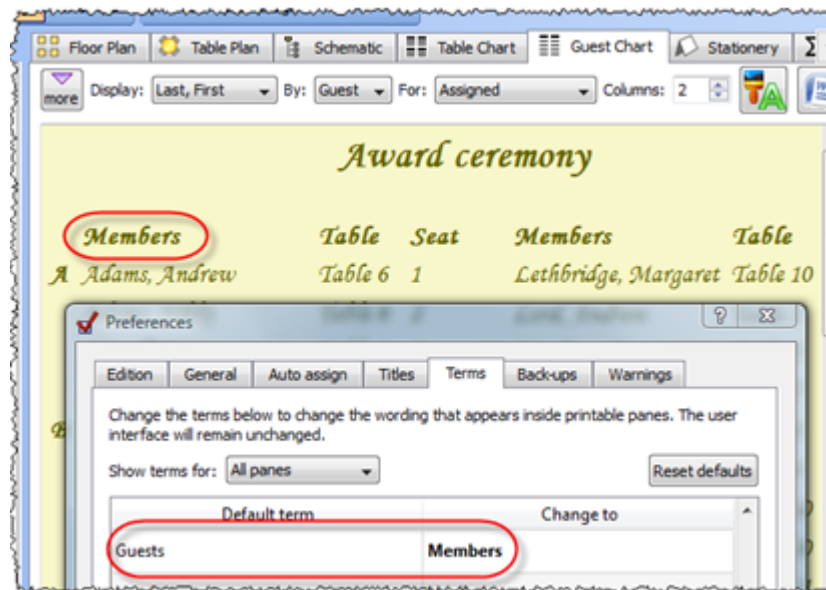
In the  **Floor Plan**,  **Table Plan**,  **Table Chart** or  **Guest Chart** pane click on the  **Colours and fonts** button at the top of the pane.

In the  **Stationery** pane select the appropriate text and click on the **Font** and **Colour** buttons at the bottom of the  **Design** tab.



3.14.2 Change text inside panes

You can change text inside  **Table Plan**,  **Guest Chart**,  **Stationery** and 

Report panes using the **Terms** tab of the  [Preferences window](#). This is particularly useful if you want to translate English terms into another language.





3.14.3 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.

3.14.4 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  **Report** 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 **report 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.

3.14.5 Select multiple items

To select multiple items in the  **Guests**,  **Groups** or  **Schematic** pane:

- To select multiple individual items +click on each item.
- To select a group of items click on the first item and *Shift*+click on the last item.
- To select multiple groups of items +click on the first item in each group and *Shift*++click

To select multiple items in the  **Floor Plan** pane:

- +click on each item.

To select all items in any of the above panes use **Edit>Select All** or +A.

4 Frequently asked questions

4.1 Frequently asked questions


For an up-to-date list of frequently asked questions see our www.perfecttableplan.com [FAQ page](#).

5 Licensing

5.1 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 .

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 select **Licensing>Retrieve Key**.

Note A standard 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. You can also purchase an [organizational licence](#).

The same licence key will work on both Windows and Macintosh.

Version 1-3 licence keys are not valid for version 4. You can [upgrade to version 4 for a small free](#).

You can also [upgrade your edition](#), e.g. from [PerfectTablePlan Home edition](#) to [PerfectTablePlan Advanced edition](#).

6 Support

6.1 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 [FAQ page](#). If you can't find an answer here or on the web site then email us at support@perfecttableplan.com . We will reply as quickly as we can.

6.2 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 and we will attempt to fix them. Please include:

- a description of the bug
- your operating system (e.g. Mac OS X 10.5)
- the version of PerfectTablePlan (from the [About window](#))
- a step-by-step description of how we can reproduce the problem
- a [screen capture](#) can often be helpful:

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 (with your permission). Please send the email and add any relevant details.

6.3 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 .

7 Updates


7.1 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. v4.0.0 and v4.1.1 will both work with a v3 licence key). Major updates require a licence key upgrade (e.g. a v3 licence key will not work with version 4.0.0). 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.

7.2 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.

Index

- A -

About window 96
 accelerators 157
 accepted 108
 anonymous guests 217
 assessing your plan 71
 assigning seats 171
 automatic seat assignment 173

- B -

background image, Floor plan pane 101
 back-up files 184
 BMP format 181
 Bottom pane 92
 budget 233
 bugs 235

- C -

capitalise names automatically 140
 caterers 233
 Change group window 96
 Chart title/footer window 97
 clipboard 177
 colour system requirements 8
 colours 106
 changing colours 232
 command line arguments 187
 context sensitive help 8
 conventions in this document 7
 copy to clipboard 177
 creating a good table plan 185
 CSV file export 183
 CSV file import 163
 custom automatic seat assignment 93
 Custom field proximity pane 93
 Custom fields window 97
 custom table 134

- D -

demonstration movies 19
 Dimensions window 101
 display name 164
 drag and drop 156

- E -

emailing a plan file 181
 enhancements 236
 E-shaped tables 231
 Estimating guest numbers 139
 etiquette for table plans 185
 Excel 220
 export chart to Excel 199
 export guest and seating data to Excel 199
 Export data window 104
 export formats 183
 Export PDF window 105
 Export vCard window 105
 Export window 104
 exporting 181

- F -

FAQ 234
 Floor plan pane 71
 background image 101
 features (dance floors, stages etc) 201
 grid 212
 images 126
 multiple rooms 207
 non-rectangular rooms 205
 show gender 208
 show groups 209
 show unassigned seats 210
 fonts 106
 changing font 232
 Fonts and colours window 106
 footer 97
 frequently asked questions 234

- G -

genetic algorithm 175

gradient 148
Group properties window 107
groups 165
 displaying in the floor plan 209
 inserting guests into existing groups 214
 moving guests between groups 214
Groups pane 68
Guest chart pane 81
guest list 66
guest list printing 223
Guest properties window 108
 custom fields 97
Guests pane 66

- H -

head table 134
help system 8
hide seats in floor plan 71
How do I 193

- I -

Image properties window 110
Import data window 112
Import window 112
importing 162
 Apple AddressBook 219
 CSV/text files 163
 Excel 220
 joining columns 137
 Outlook 220
 Outlook Express 220
 seating data 220
 splitting columns 150
 tutorial 49
 vCard files 163
Information window 120
Insert couple window 120
Insert family window 123
Insert floor plan image window 126
Insert group window 127
Insert guest window 130
Insert shape window 133
Insert table window 134
Insert text window 136
Insert tool bar 64

integrating PerfectTablePlan 186
introduction 7
invitation 229

- J -

Join columns window 137
JPEG format 181

- K -

keyboard accelerators 157

- L -

labels 229
Left pane 66
letters 229
Licence window 137
licensing 234
locking a guest 171

- M -

mail merge 82
Main tool bar 62
meal selection 167
memory 8
Menu bar 61
Microsoft Excel 220
Microsoft Outlook 220
Microsoft Outlook Express 220
Most recently access window 138
movies 19
multiple seatings 196
multi-user access 185

- N -

name badges 180
newsletter 237
non-seated guests 219
Numbers and budget window 139

- O -

operating system 8
 Outlook 220
 Outlook Express 220

- P -

panes

Bottom pane 92
 Custom field proximity pane 59, 66, 68, 70, 71, 75, 79, 80, 81, 82, 90, 92, 93
 Floor plan pane 71
 Groups pane 68
 Guest chart pane 81
 Guests pane 66
 Left pane 66
 Proximity pane 92
 Report pane 90
 Schematic pane 79
 Stationery pane 82
 Table chart pane 80
 Table plan pane 75
 Top pane 70

paper size, printer 222
 PDF format 200
 PerfectTablePlan file format 187
 place cards 180
 PNG format 183
 post nominal titles 164
 poster sized prints 224
 post-nominal titles 218
 Preferences window 140
 Print setup window 146
 Print window 145
 printer paper size 222
 printing 178
 guest list 223
 on a small printer 223
 poster size 224
 Proximity pane 92

- Q -

Quick add guests window 147
 quick start guide 9

- R -

read-only access 185
 renaming tables 232
 re-ordering tables 230
 report a bug 235
 Report pane 90
 room shapes, non-rectangular 205
 rooms, multiple 207
 RSVP status 166

- S -

Save stationery layout window 147
 Schematic pane 79
 scoring 173
 screen resolution 8
 search
 in Groups pane 68
 in Guests pane 66
 in Proximity pane 92
 seat assignment 171
 Select gradient window 148
 Select groups window 148
 Select guests window 149
 Shape properties window 149
 snap to grid 212
 Split columns window 150
 Stationery layout window 151
 Stationery pane 82
 stationery samples 228
 stationery tutorial 44
 Status bar 65
 Substitution text 82
 support 235
 system requirements 8

- T -

Table chart pane 80
 table order 230
 Table order window 153
 Table plan pane 75
 Table properties window 153
 template floor plan 207
 Text properties window 155

themes 106
 title
 customising 216
 in Guest chart or Table chart pane 97
 in Guest properties window 108
 in Preferences window 140
 names and titles 164
 post-nominal 218
 title/footer for chart 198
 tool bars 59
 Insert 64
 Main 62
 Task 61
 Top pane 70
 tutorial 20

- U -

uninstalling 193
 updates 236

- V -

vCard export 181
 vCard import 163
 vector formats 183
 version of PerfectTablePlan 96
 versions of the plan 222
 VIP 108

- W -

web pages 8
 What's this help 8
 Windows 94
 About window 96
 Change group window 96
 Chart title/footer window 97
 Dimensions window 101
 Export data window 104
 Export PDF window 105
 Export VCard window 105
 Export window 104
 Fonts and colours window 106
 Group properties window 107
 Guest properties window 108
 Image properties window 110

Import data window 112
 Import window 112
 Information window 120
 Insert couple window 120
 Insert family window 123
 Insert floor plan image window 126
 Insert group window 127
 Insert guest window 130
 Insert shape window 133
 Insert table window 134
 Insert text window 136
 Join columns window 137
 Licence window 137
 Main window 59
 Most recently accessed window 138
 Numbers and budget window 139
 Preferences window 140
 Print setup window 146
 Print window 145
 Quick add guests window 147
 Save stationery layout window 147
 Select gradient window 148
 Select groups window 148
 Select guests window 149
 Shape properties window 149
 Split columns window 150
 Stationery layout window 151
 Table order window 153
 Table properties window 153
 Text properties window 155

- Z -

zooming in/out 213