

# PerfectTablePlan v5.1.1

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



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# 1 Getting started

## 1.1 Introduction

### 1.1.1 Introduction

## PerfectTablePlan v5.1.1 for Windows

PerfectTablePlan helps you to 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 or a spreadsheet.

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 [Mac OS X](#). It is also available in [HTML](#) format.

### 1.1.2 Conventions in this document

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 shown in a `non-proportional` font.

Text that refers to keyboard keys is in *italics*. E.g. the keyboard accelerator for **Insert>Single Guest** is *Ctrl+G*, which means hold down the *Ctrl* 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.

### 1.1.3 System requirements

The suggested requirements for running this software are:

Operating system	Windows 8, Windows 7, Windows Vista, Windows XP (32 or 64 bit variants).
Processor	166 MHz or better
Memory	64 MB or better
Screen resolution	800x600 pixels or better
Colours	65,536 colours or better

If your operating system is more recent than the above [check our website](#) to find a compatible version of PerfectTablePlan.

You may be able to run the software satisfactorily on lower specification systems, but we can't guarantee it. If in doubt, try running [unlicensed trial 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 the *F1* key or click on a **Help** button. This opens help in a separate window.

#### The Windows help viewer

You can print out sections of the help by right clicking on a topic and selecting **Print**. The Windows help application contains 4 standard help tabs:

#### Contents

Displays the Help table of contents as a tree. Click on topics to expand them.

## Index

Displays the Help index.

## Search

Type a word or phrase into the field and click **List Topics**. A list of topics that contain the word or phrase will be displayed. Double-click one of these to display the desired topic in the right pane.

## Favorites

Use this pane to bookmark useful pages.


## PDF help

A PDF version of the help is also installed with the application. You may find this more suitable for printing. Note however that is over 300 pages in length!

## 'How do I?' help


Click on the **How do I?** button on the main tool bar to see a list of common tasks you might want to perform. Select 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.

To access **What's this help** for other windows select the  logo in the title bar of the window (the exact logo will depend on your operating system and other settings). Then click on the item you are interested in.

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

Note that you can easily switch between this **Help** window and the PerfectTablePlan **Main** window using *Alt+Tab* keys on the keyboard (hold down the *Alt* key and press *Tab* until you get the window you want).

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 1. Add guests

Click on the <sup>1</sup>  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
<b>Anon</b>	Check this if you don't know the guest's name yet.
<b>Title</b>	The guest's title.
<b>First name</b>	The guest's first (given) name(s). You can also record middle names or initials, if you wish.
<b>Last name</b>	The guest's last (family) name(s).
<b>Suffix</b>	Any title or role that comes after the name.
<b>Display name</b>	The name you wish to display for the guest (which may include qualifications, job title and other information).


<b>Gender</b>	Whether the guest is male or female.
<b>Age</b>	Whether the guest is an adult or a child.
<b>Meal</b>	The guest's choice of meal (separated by commas if there are choices in multiple courses).
<b>Special req</b>	Any special requirements the guest has, e.g. diabetic or in a wheelchair (separated by commas if there is more than one special requirement).
<b>Notes</b>	Used to record useful information not recorded elsewhere.
<b>VIP</b>	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.
<b>RSVP</b>	Whether the guest has been sent an invitation, accepted, declined, cancelled or arrived.


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 **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** or the equivalent **Main** tool bar button. You will be asked to provide a name for the new plan file.




## 2 2. Decide who should sit near whom


Click on the <sup>2</sup>  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 this into account 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 *Ctrl+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 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
E-shaped		A head (top) table + 2 or

		more sprigs (legs) ( <a href="#">Advanced and Professional editions</a> only)
<b>Rectangular</b>		A rectangular or square table with seats on four sides.
<b>Banquet</b>		A long table with seats on two sides.
<b>Head</b>		A long table with seats on only one side, for example a head (top) table at a wedding or banquet.
<b>Custom</b>		A rectangular or square table with potentially different numbers of seats on each of the 4 sides.
<b>Circular</b>		A circular table with seats all around it.
<b>Semi-circular</b>		A semi-circular table with seats around the straight side and/or curved sides.
<b>Oval</b>		An elliptical table with seats all around it.
<b>Row of seats</b>		A row of seats (no table).

Each table has the following properties:

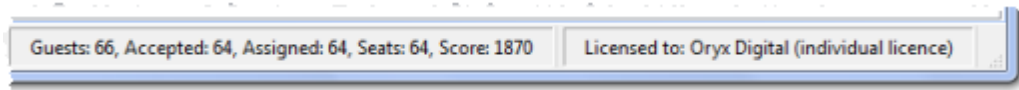
Property	Meaning
<b>Name</b>	The name displayed for the table. The default name is "Table 1" , "Table 2" etc, but you can set any name.
<b>Shape</b>	See above.
<b>Angle</b>	The rotation angle of the table in the  <b>Floor Plan</b> and  <b>Table Plan</b> panes.
<b>Colour</b>	The colour of the table in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









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





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


You should make sure that you have enough seats for all your guests. You can see


how many seats and guests you have at any time by looking in the **Status** bar at the bottom of the **Main** window.






New tables will be placed in an empty space near the centre of the  **Floor Plan** pane. You can move tables in the  **Floor Plan** by dragging them (left click on the centre of a table, hold down the left mouse button and drag to the appropriate position). You can zoom in and out of the  **Floor Plan** using the  and  buttons, or zoom so all tables are visible using the  button. When you are zoomed in you can move around the  **Floor Plan** by 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 text** ,  **Insert image** and  **Insert shape** buttons to add text, images and shapes to the  **Floor Plan** pane. Text can be used for titles, headers and footers. Images can be used for decorations, logos or [clipart](#). Shapes can be used to represent dance floors, stages, walls and other features of your floor plan.


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 view different tables.








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

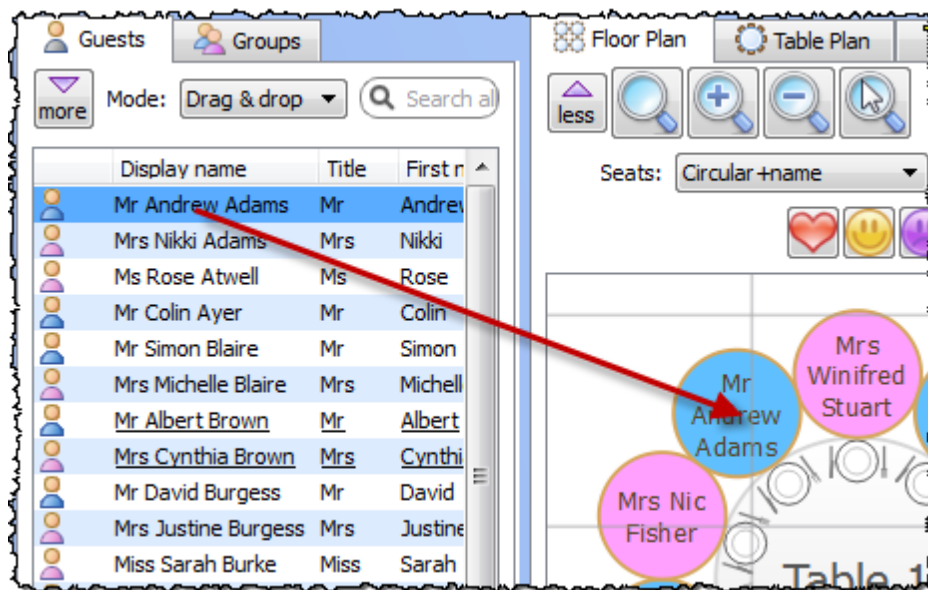
#### 4. Assign guests to seats




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



Once you have entered guest details and added tables, you can assign seats automatically or by 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 *Ctrl*+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>Guest Property>Locked>**  **Yes** (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 potential seating issues (such as guests with proximity  who aren't sat next to each other) and the  button will show you critical seating issues (such as guests not sat next to any of their  proximity guests). 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 reports about your plan, including a **Summary** report and a **Troubleshooting** report.


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 **Ctrl +Click**.

## 5 5. Output

Click on the <sup>5</sup>  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.
- Copy the contents of the  **Floor Plan** ,  **Table Plan**,  **Table Chart**,  **Guest Chart** and/or  **Report** panes into the clipboard using **Edit>**  **Copy**. Copy the contents of the  **Table Chart**,  **Guest Chart** or  **Report** panes into Microsoft Word or Excel by clicking the  or  buttons at the top of the pane. You must have Microsoft Word or Excel installed.
- [Export your plan to another application](#) using **File>**  **Export**.
- Order a digital poster print or place cards using **File>**  **Order Posters and Cards**.
- [Display seating assignments as scrolling text on a VDU or plasma screen at the venue](#) using the  **VDU Chart** pane.

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

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

If you want to get a feel for editing a table plan without creating a whole new plan, try experimenting with the sample plans supplied with PerfectTablePlan.

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 available 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](#).

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

### 1.4.2 1. Getting started

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

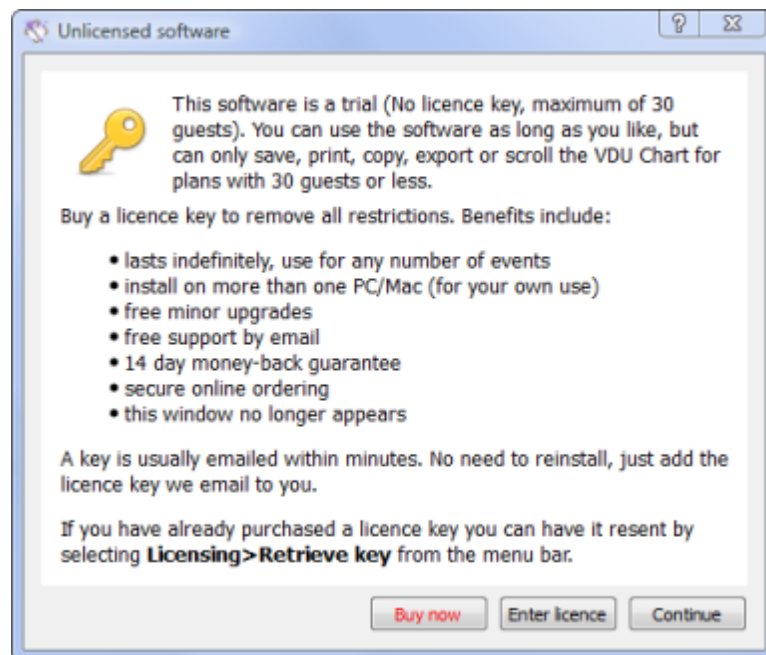
You can do this either by double clicking on the  PerfectTablePlan icon on your Windows desktop or by selecting **All programs>PerfectTablePlan<version>> PerfectTablePlan<version>** from the Windows **Start** button.

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, right click on **Tutorial** in the left pane of the **Help** window and select **Print**. Select **Print the selected heading and all subtopics** and click the **OK** button.

You can also print the PDF version of the help.

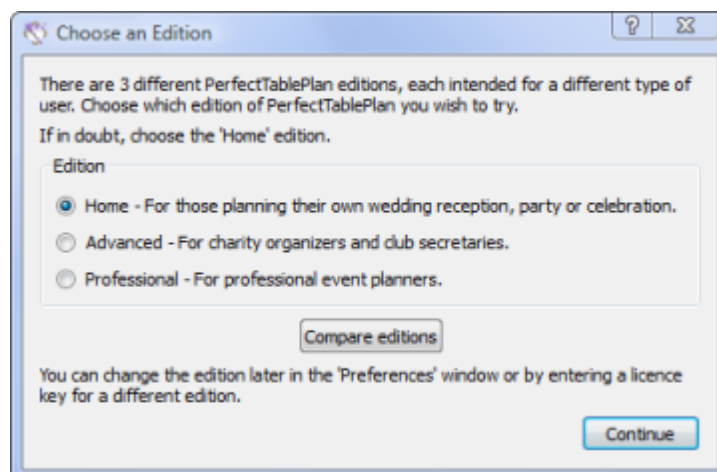
Warning The PDF help is nearly 300 pages!

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.

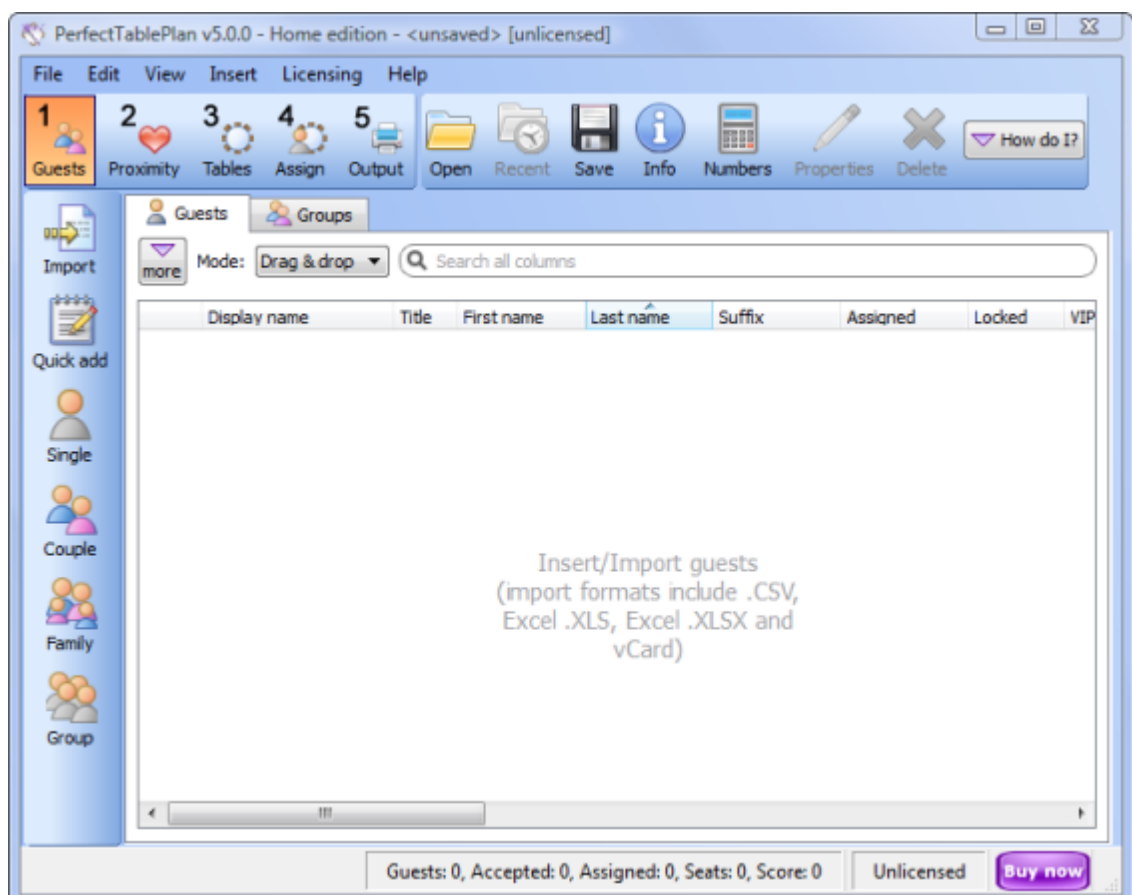
If you don't enter a licence key, you will need to choose an edition of PerfectTablePlan. You can complete this tutorial with any of the 3 editions. Choose the edition that you think is most appropriate for you. If in doubt, click the **Compare** editions button to find out more.



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

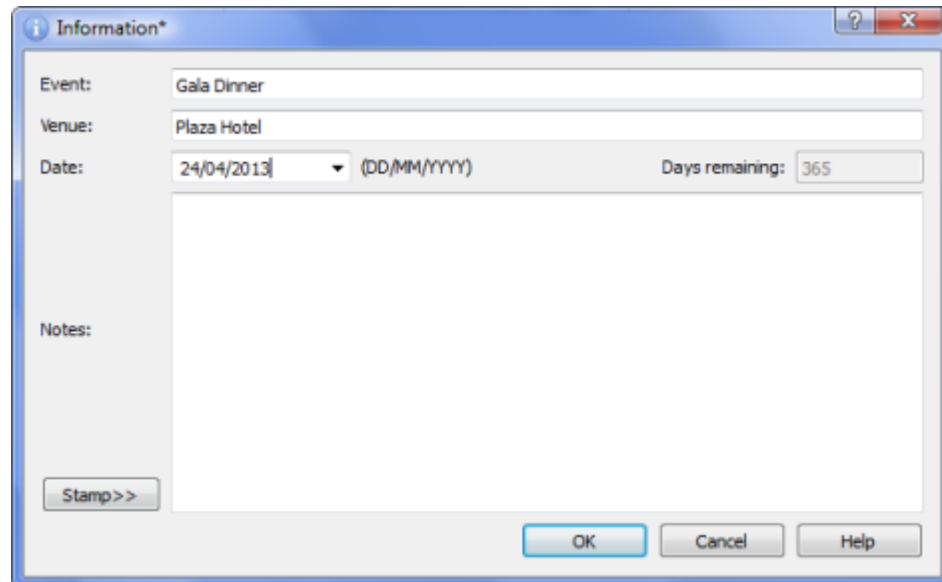


If you don't want to see it again uncheck the **show this message next time** check box. Click the **Continue** button. You should now see the **Main** window. For this tutorial we will use the basic interface, select **View>User Interface>Basic**, if it isn't already selected. Then click on the **1.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

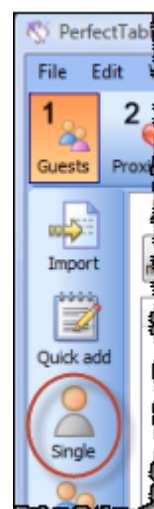


Next: [2. Add guests >>](#)

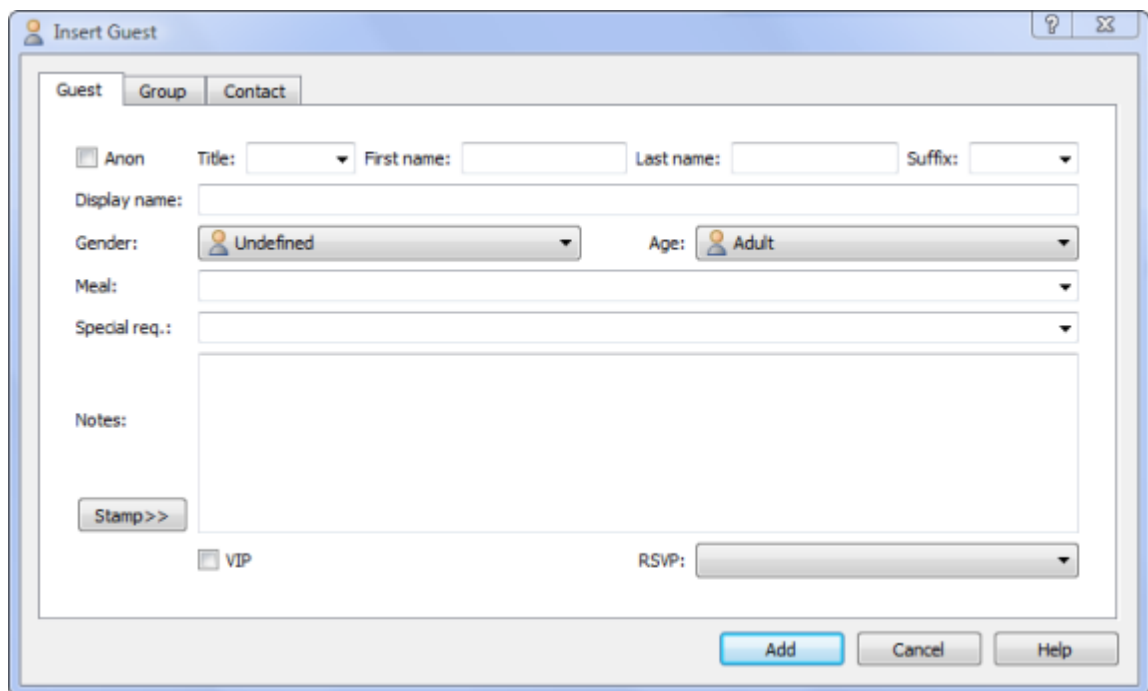
### 1.4.3 2. Add guests

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**.

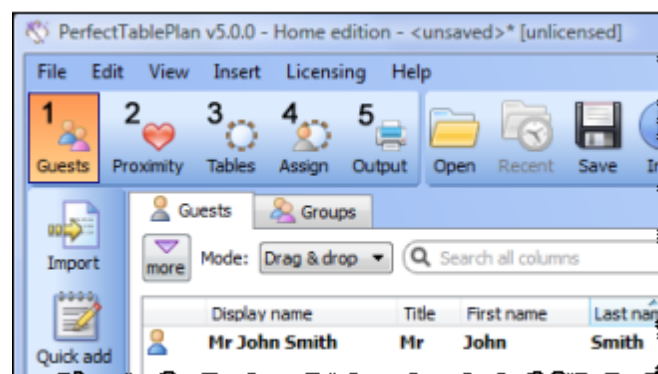
Type `john` in the **First name** field. Press the keyboard *Tab* key to move to the next field.

Type `smith` in the **Last name** field. Press the *Tab* key.

Leave the **Suffix** field empty. Press the *Tab* key.

Note the **Display name** has been set to `Mr John Smith`.

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



Click on the 👤 **Insert guest couple** button in the left (Insert) tool bar. The 👤 **Insert Couple** window will appear. Fill in the details of the first guest of the couple, as below. Click on the **VIP** check box to show that this is a particularly important guest:

**Insert Couple\***

Guests | Group | Contact

☐ Anon Title: Mr First name: Joe Last name: Bloggs Suffix:   
Display name: Mr Joe Bloggs  
Gender: Male Age: Adult  
Meal:   
Special req.:   
Notes:   
Stamp >>   
☒ VIP RSVP:   
☐ Anon Title: Mrs First name: Last name: Bloggs Suffix:   
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 <sup>2</sup> **Proximity** button in the **Task** tool bar. Notice that a is displayed in the **Proximity** pane for the couple.

Proximity	
Display: Last, First	
Bloggs, Jill	Bloggs, Joe
Bloggs, Joe	Bloggs, Jill

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

Click on the <sup>1</sup> **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:

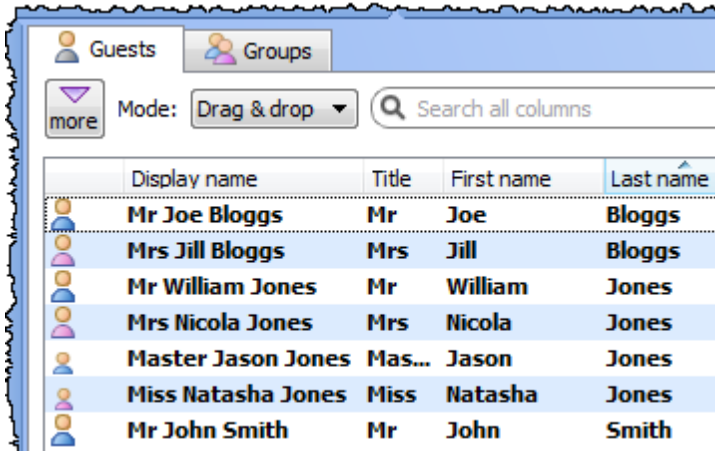
Title	First name	Last name	Gender	Age
Mr	William	Jones	Male	Adult
Mrs	Nicola	Jones	Female	Adult
Master	Jason	Jones	Male	Child
Miss	Natasha	Jones	Female	Child

Click the **Add** button.

Click on the <sup>2</sup>  **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 <sup>1</sup>  **Guests** button in the **Task** tool bar.

Select **File** >  **Save** or the equivalent **Main** tool bar button to save the plan. The **Save As** window will appear. Enter an appropriate name, such as `tutorial`, and click **Save**.

Look at the  **Guests** pane.



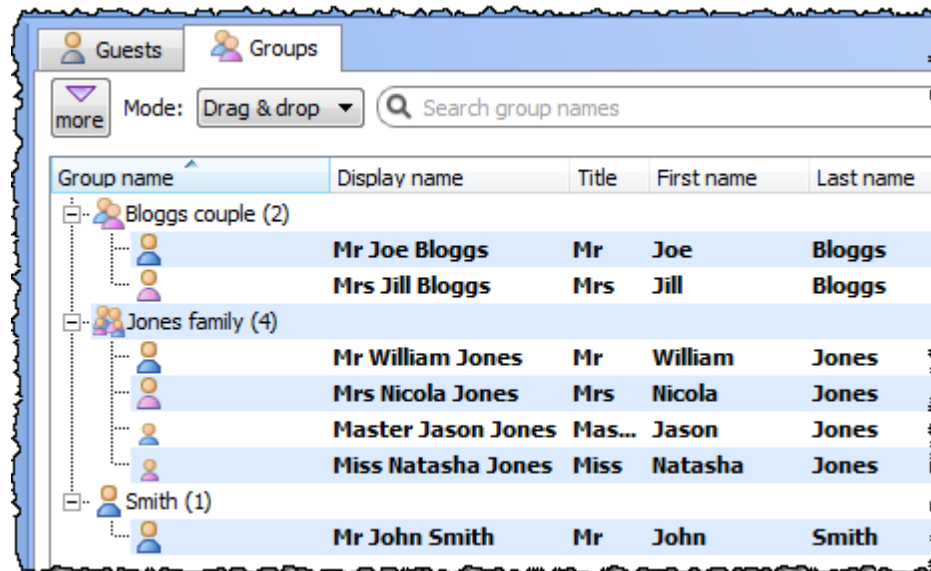
Display name	Title	First name	Last name
Mr Joe Bloggs	Mr	Joe	Bloggs
Mrs Jill Bloggs	Mrs	Jill	Bloggs
Mr William Jones	Mr	William	Jones
Mrs Nicola Jones	Mrs	Nicola	Jones
Master Jason Jones	Mas...	Jason	Jones
Miss Natasha Jones	Miss	Natasha	Jones
Mr John Smith	Mr	John	Smith

Notice that you can determine age and gender from the guest icon size and

colour. 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.

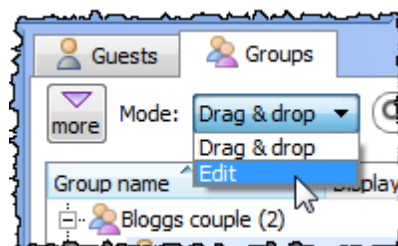
Click on the  **Groups** tab.



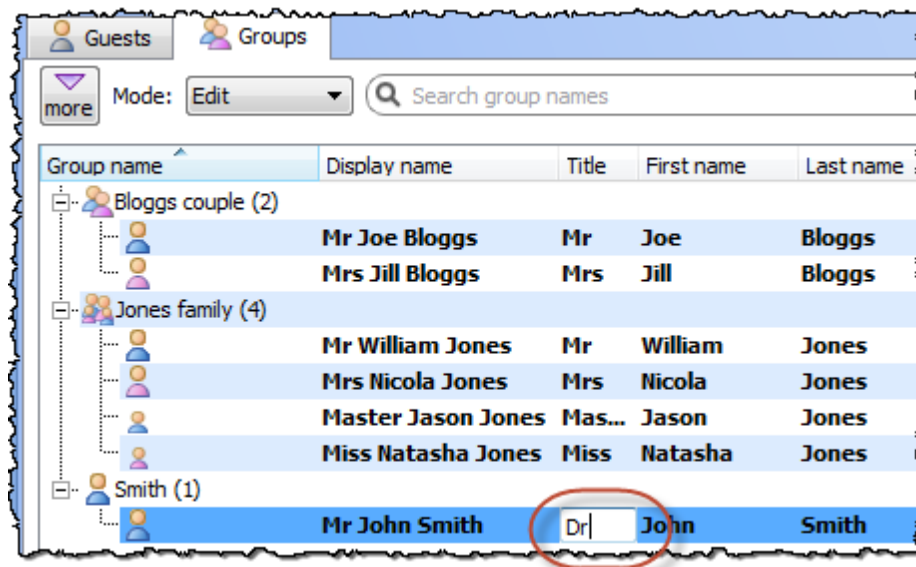
Group name	Display name	Title	First name	Last name
<b>Bloggs couple (2)</b>				
	<b>Mr Joe Bloggs</b>	<b>Mr</b>	<b>Joe</b>	<b>Bloggs</b>
	<b>Mrs Jill Bloggs</b>	<b>Mrs</b>	<b>Jill</b>	<b>Bloggs</b>
<b>Jones family (4)</b>				
	<b>Mr William Jones</b>	<b>Mr</b>	<b>William</b>	<b>Jones</b>
	<b>Mrs Nicola Jones</b>	<b>Mrs</b>	<b>Nicola</b>	<b>Jones</b>
	<b>Master Jason Jones</b>	<b>Mas...</b>	<b>Jason</b>	<b>Jones</b>
	<b>Miss Natasha Jones</b>	<b>Miss</b>	<b>Natasha</b>	<b>Jones</b>
<b>Smith (1)</b>				
	<b>Mr John Smith</b>	<b>Mr</b>	<b>John</b>	<b>Smith</b>

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

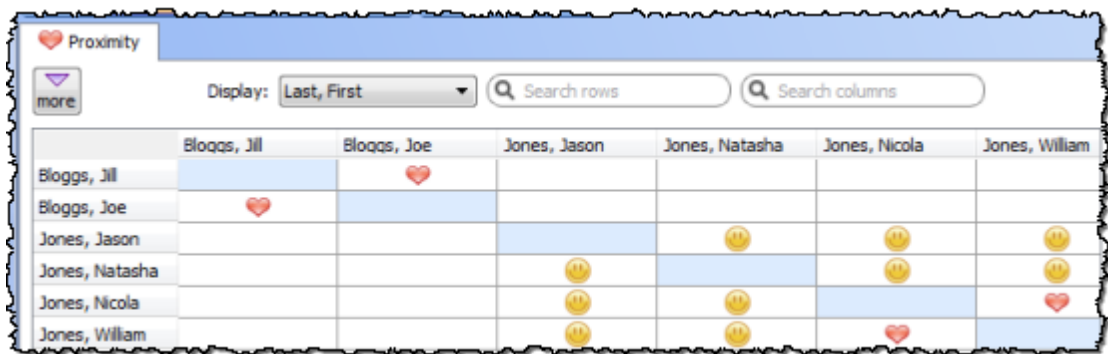
Note You can also add guests by [importing](#) them from other applications such as [Excel](#), [Outlook](#) and [Outlook Express](#). This can save you a lot of typing. Importing is covered in [Tutorial 9](#).

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

#### 1.4.4 3. Set proximity

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

Click on the <sup>2</sup> **2.Proximity** button in the **Task** tool bar to show the **Proximity** pane:

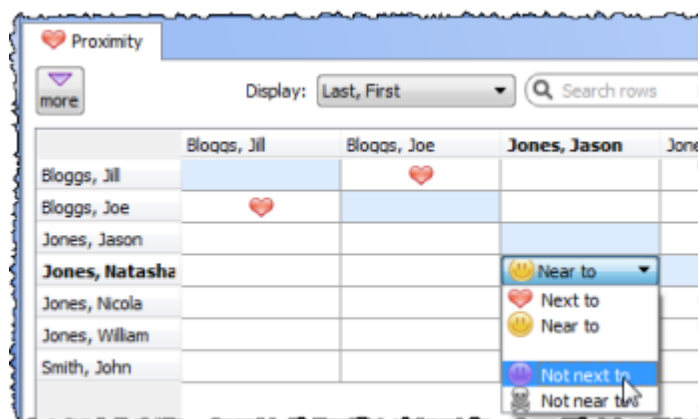


The screenshot shows the 'Proximity' pane with a table of guest proximity preferences. The table has columns for guests: Bloggs, Jill; Bloggs, Joe; Jones, Jason; Jones, Natasha; Jones, Nicola; Jones, William. The rows are the same guests. The table is symmetric. Red hearts indicate 'Next to' preferences, and yellow smiley faces indicate 'Near to' preferences.

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

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

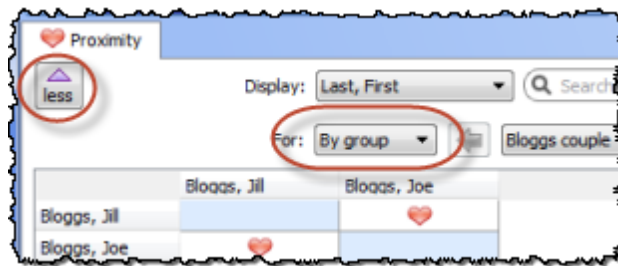


The screenshot shows the 'Proximity' pane with the same table as before. The cell for Jones, Jason (column) and Jones, Natasha (row) is selected, and a dropdown menu is open. The menu options are: Near to (😊), Next to (❤️), Near to (😊), Not next to (🚫), and Not near to (🚫). The 'Not next to' option is highlighted.

	Bloggs, Jill	Bloggs, Joe	Jones, Jason	Jones, Natasha
Bloggs, Jill		❤️		
Bloggs, Joe	❤️			
Jones, Jason				
Jones, Natasha				
Jones, Nicola				
Jones, William				
Smith, John				

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

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

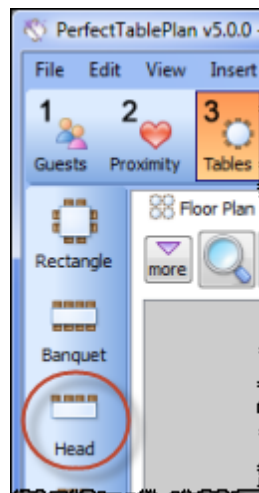


The proximity will become important when we start assigning guests to seats.

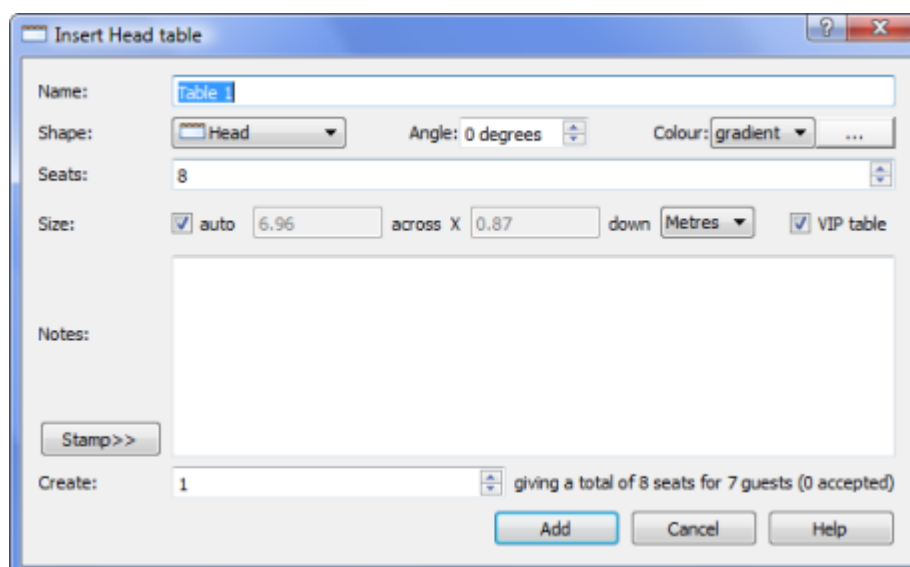
Next: [4. Add tables >>](#)

#### 1.4.5 4. Add tables

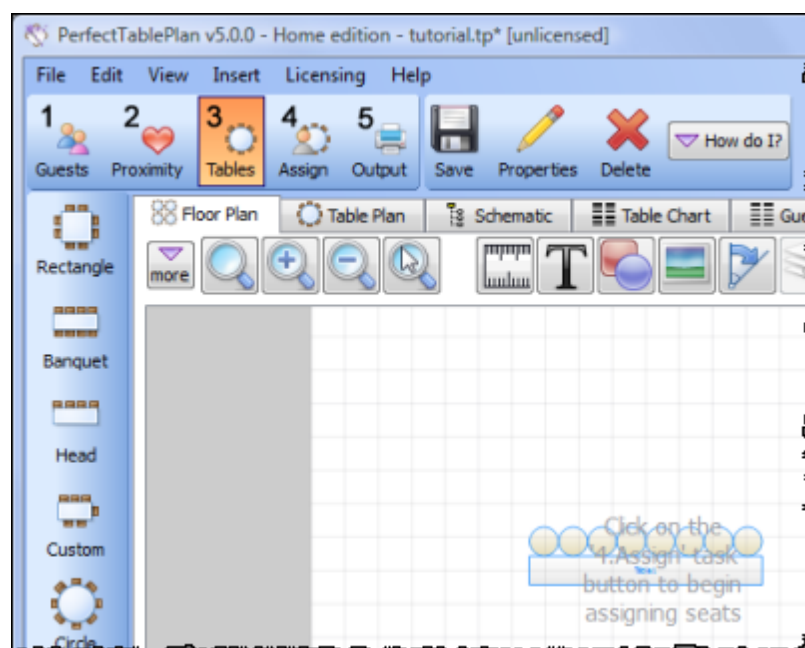
The next step to creating your table plan is to add some tables for the guests to sit at. Click on the **3. Tables** button in the **Task** tool bar. Click on the **Insert Head Table** button in the **Insert** tool bar.



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.

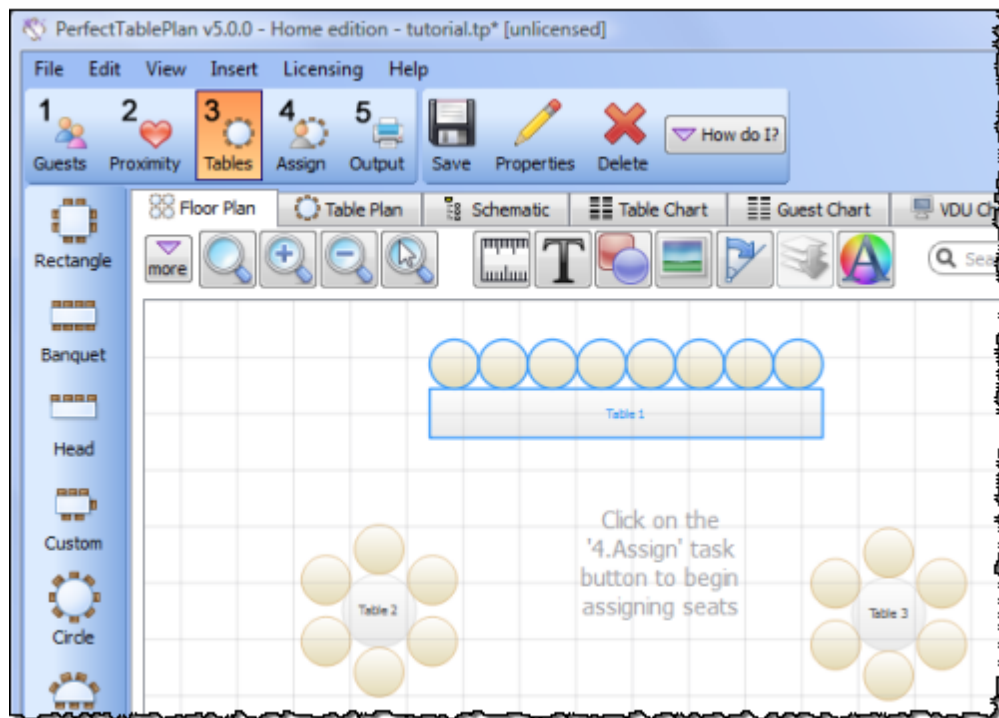




Leave the **auto** box checked to allow PerfectTablePlan to set a table size based on the number of seats and the **Seat width** set in the  **Dimensions** window.


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).

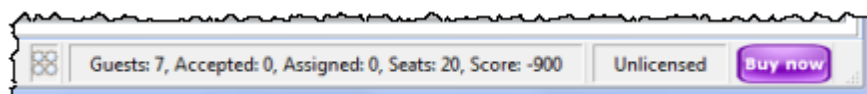
You can change the size of the floor plan using the  button. This allows you to enter the dimensions of the venue in which the event will take place.

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

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

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




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

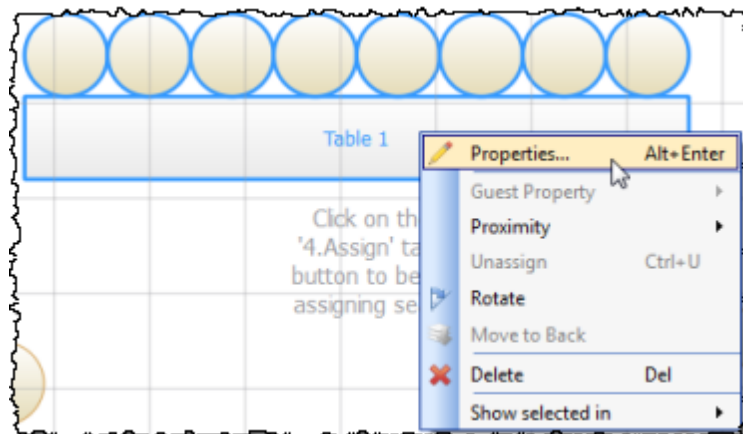


Click on the <sup>1</sup>  **1.Guests** button in the **Task** tool bar. Add another 11 guests using



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 [backup 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.

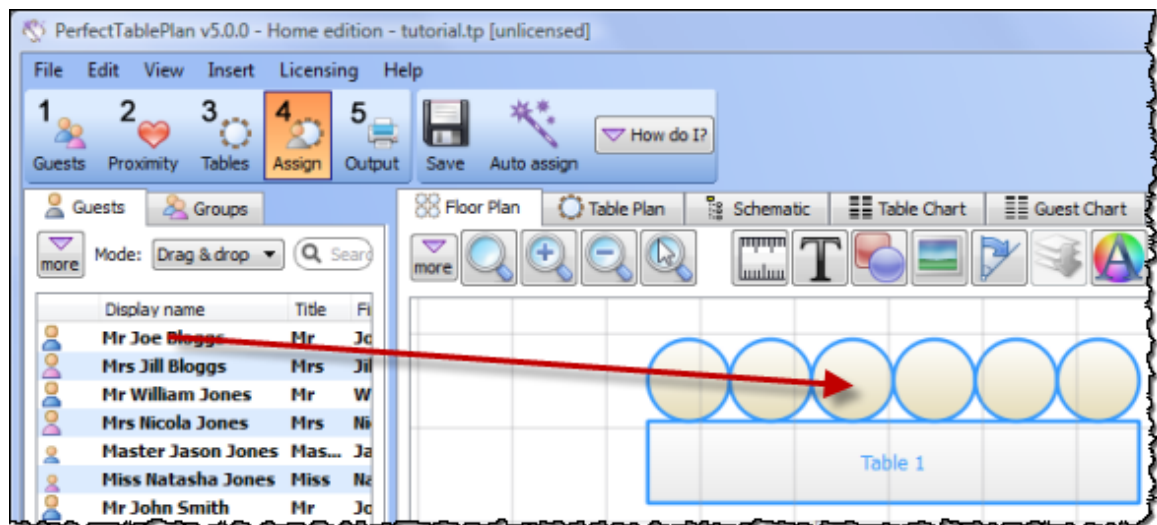
Next: [5. Assign guests >>](#)

### 1.4.6 5. Assign guests

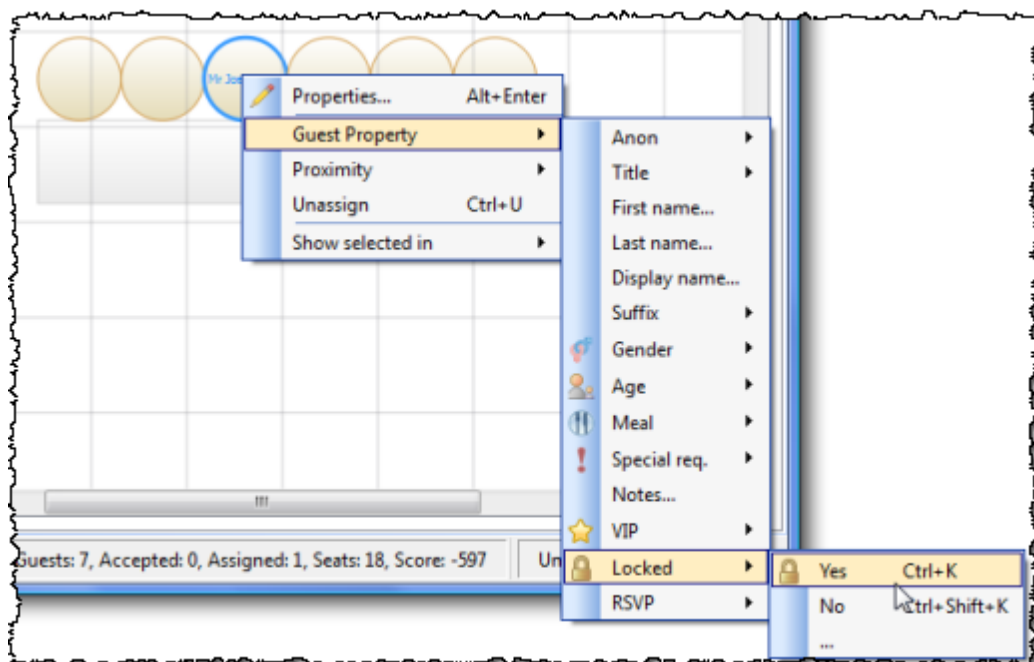
The next step is to assign guests to seats. Click on the  **4.Assign** button in the **Task** tool bar.

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 **Guest Property>Locked>Yes**.

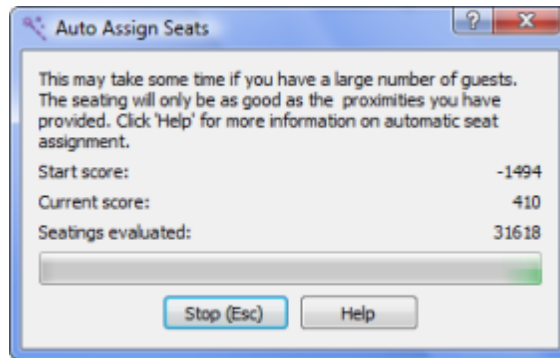



A locked guest cannot be re-assigned until they have been unlocked. This is particularly useful for stopping the **Auto seat assign** from moving guests who you wish to remain in their assigned seat. You can also select a table and lock all the guests on it.

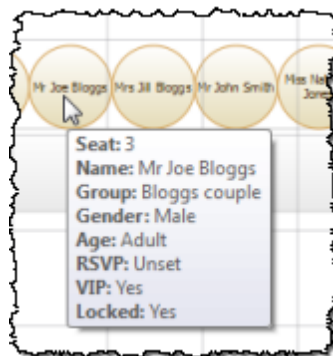
Drag Mrs Jill Bloggs to the next seat to Mr Joe Bloggs and lock her, in the same way. Note that locked guests appear underlined in the **Guests** and **Groups** panes.



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:





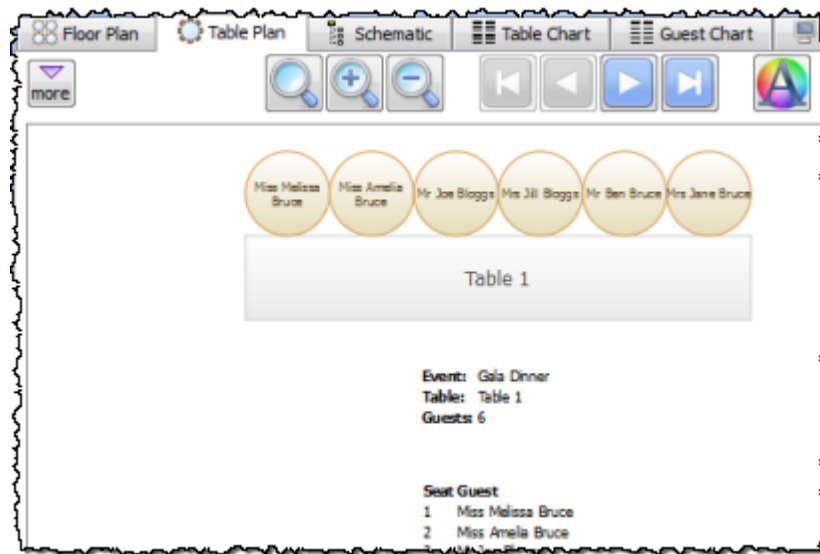
The **Auto Assignment** window should disappear after a few seconds. If you look at the  **Floor Plan** pane you should see that all seats now have guests assigned. If you hover the mouse cursor over a seat the details of the guest assigned will be displayed:



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 customize 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

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 +6 made up of:

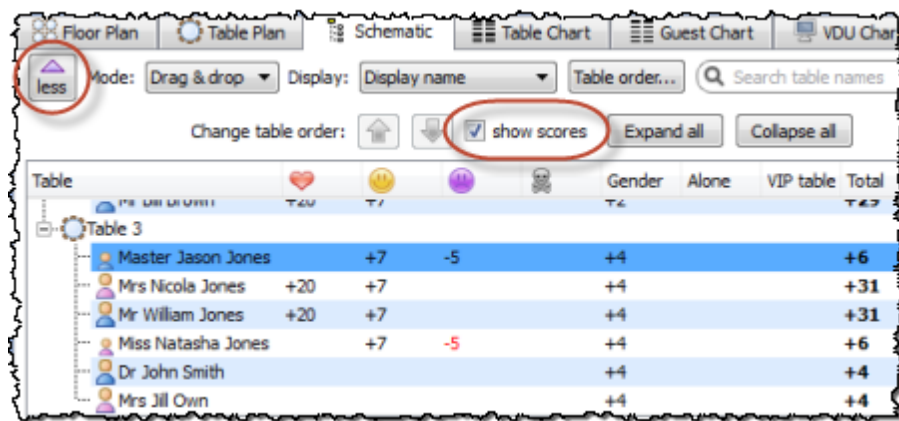
+5 for being next to Mrs Nicola Jones with 😊 proximity

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

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

+4 for being a male next to 2 females

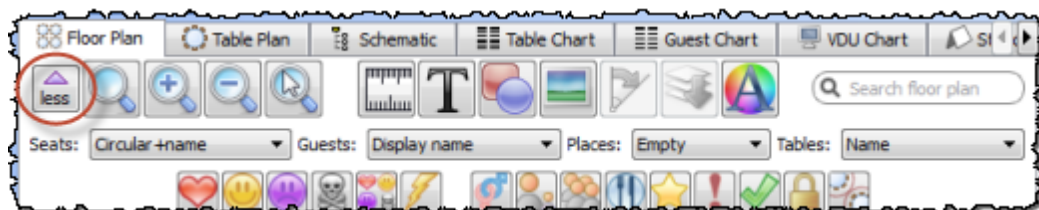
= +6 total



🔧 **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 not sat next to each other. Holding down the button show critical issues, for example guests with at least one proximity but not sat next to any of them.

Depress the button to colour code guest genders (blue for male, pink for female, grey for undefined).

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

Depress the 🧑🏠 button to colour code which groups guests belong to.

Depress the 🍽️ button to show colour-coded meal choices. Each meal is displayed in a different colour. 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. .

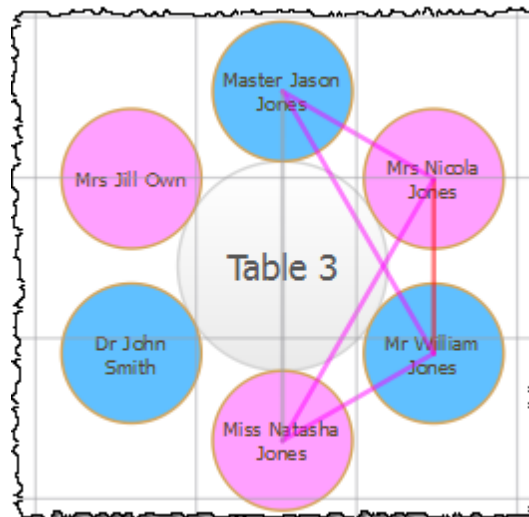
Depress the ⭐ button to show guest and table VIP status (shown with stars).

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.



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 useful **Summary** and **Troubleshooting** reports of your plan in the  **Report** pane.


If you want to experiment with a table plan without creating one from scratch, try loading one of the example plans installed with PerfectTablePlan (select **File**> **Open**).



See also:

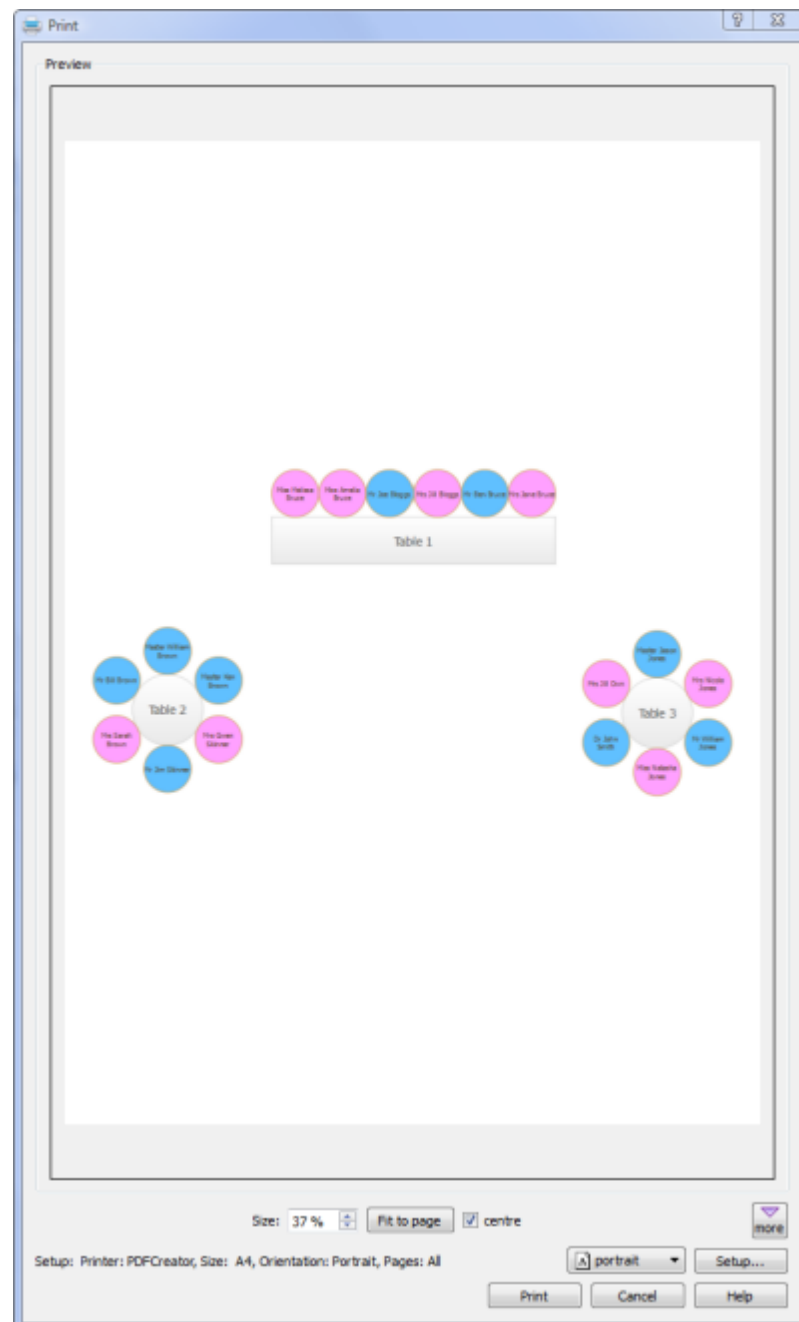
- [Creating a good table plan](#)

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

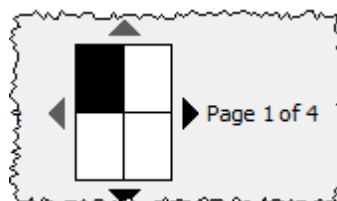
#### 1.4.8 7. Print plan

The next step is to print and/or export your table plan. Click on the <sup>5</sup> **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 **Summary** report from 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**. Copy the contents of the  **Table Chart**,  **Guest Chart** or  **Report** panes into Microsoft Word or Excel by clicking the  or  buttons at the top of the pane. You must have Microsoft Word or Excel installed.



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.

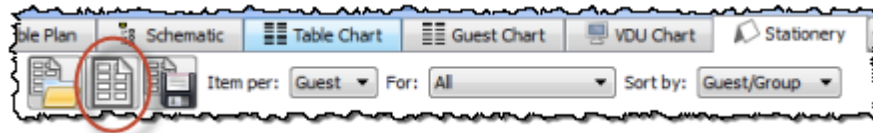
As an alternative to printing, note that you can also [display seating assignments as scrolling text on a VDU or plasma screen](#).

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

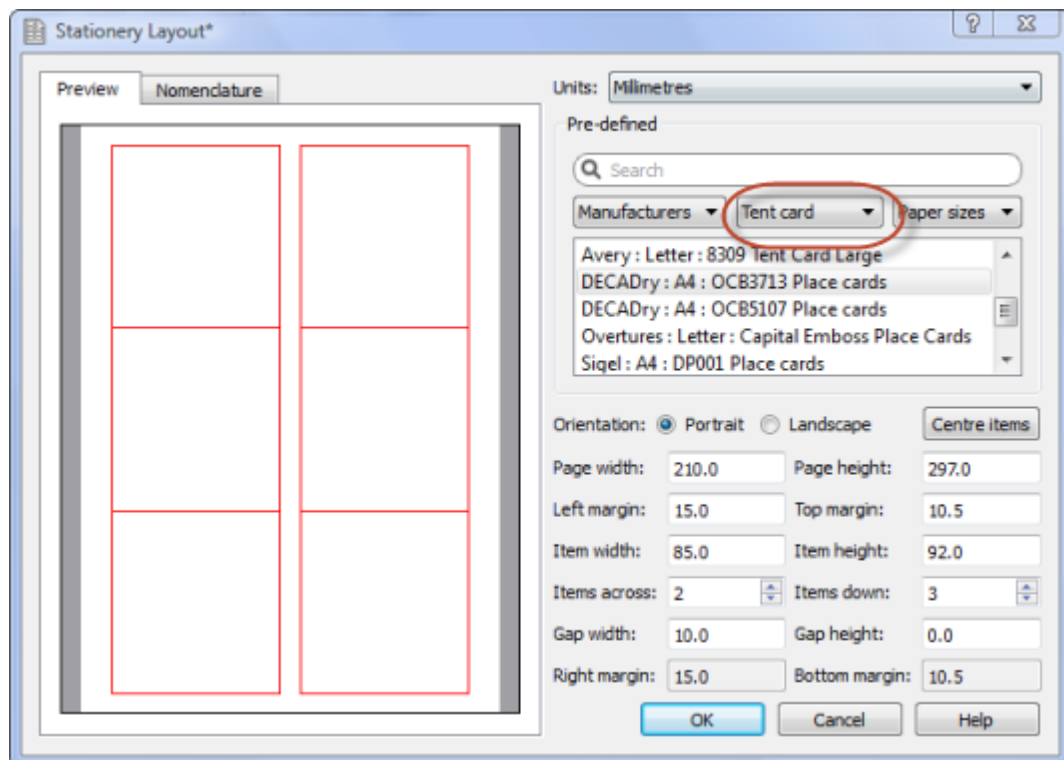
## 1.4.9 8. Print stationery



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.



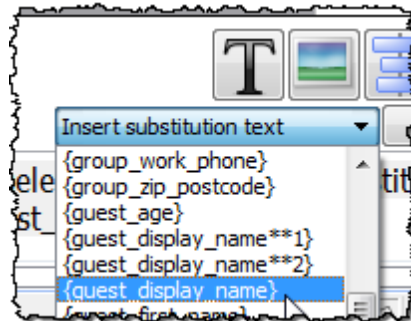
The **Stationery Layout** window will appear. From the filters select **Tent card** and then click on the **DecaDry OCB3713** place cards. Click **OK**.



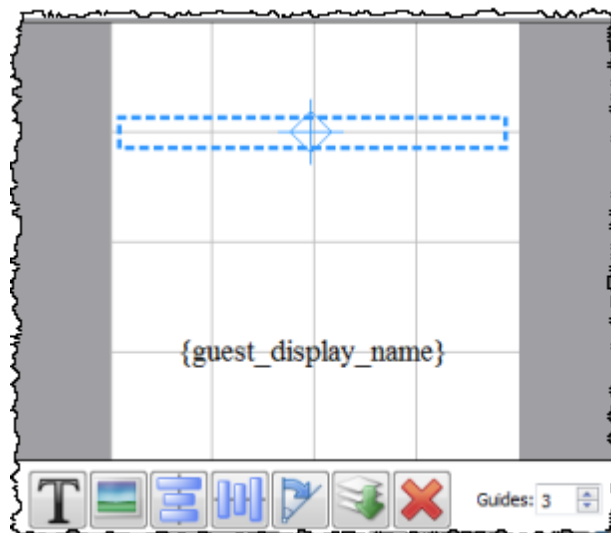
Set the number of **Guides** to 3 in the  **Stationery** pane. These help to position the text. Now click on the  **Add text** button. The cursor will change to a crosshair. Click on the bottom centre of the place card (as shown below).



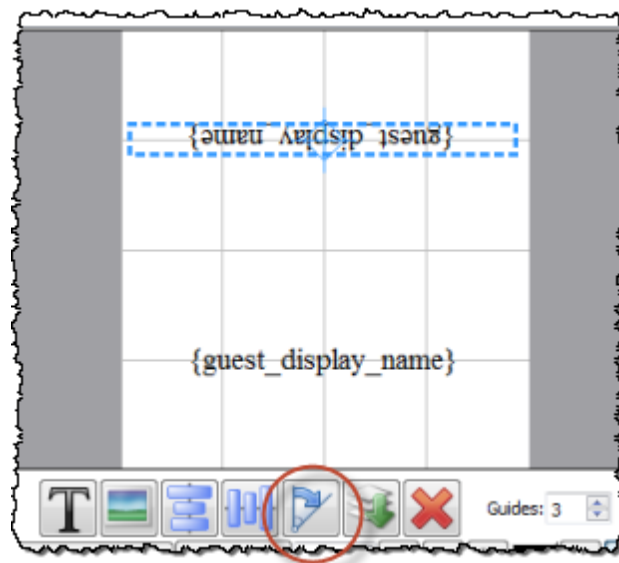
Ensure **Item per** is set to **Guest** (at the top of the pane) and select `{guest_display_name}` from **Insert substitution text**.




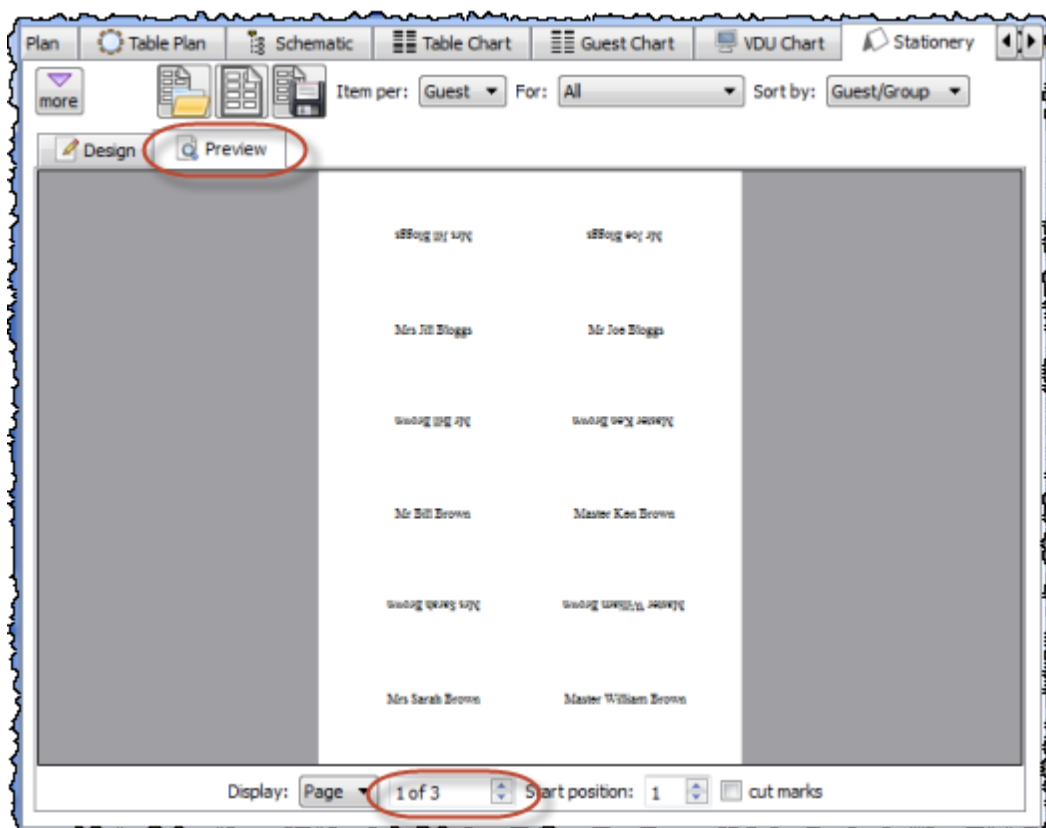
Click the **T Add text** button again. The cursor will change to a crosshair. Click on the top centre of the place card (as shown below).




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.

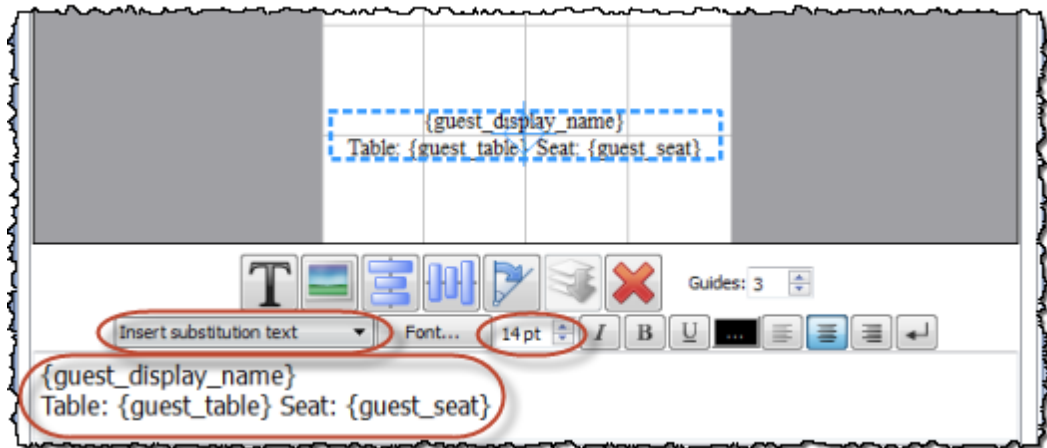


Click on the  **Preview** tab to preview how the place cards will be printed. Notice that the text inside the curly brackets has been substituted by guest display names. Change the page number to see what each page will look like.




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.

You can also add [images](#) , [colour coded spots](#) and [personalised maps](#) to your 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](#).

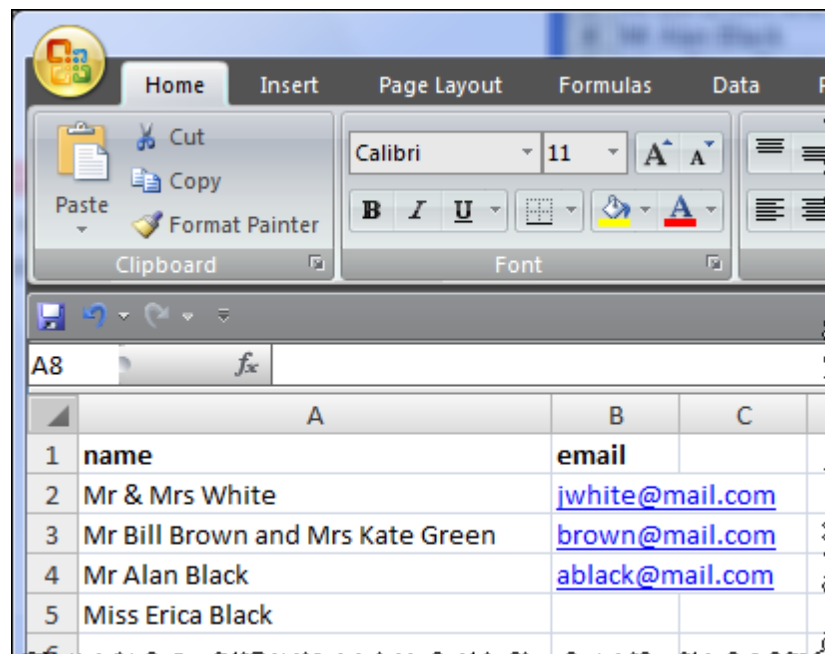
Next: [9. Import guests >>](#)

### 1.4.10 9. Import guests

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.

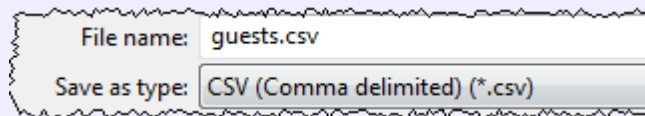
Create a simple Excel spreadsheet like the one below:



If you have Excel installed you can import directly from your Excel .xls/.xlsx file. Otherwise you will have to save to a .csv (comma separate value) file, as described below.

### Creating a .csv file in Excel

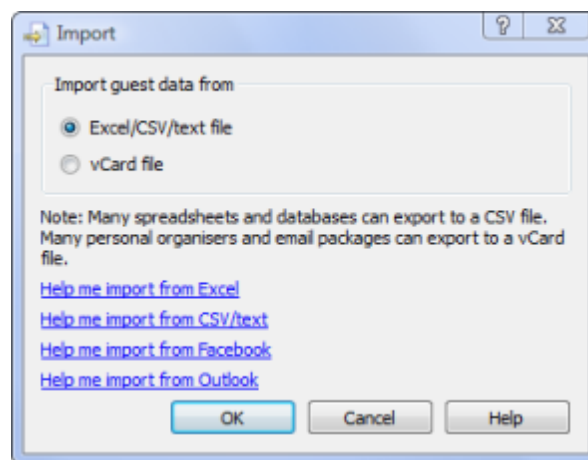
Select **File>Save As** and save it as the .csv file `guests.csv` (do not just rename a .xls file to a .csv file). Click **OK** on any windows warning you about changing format.



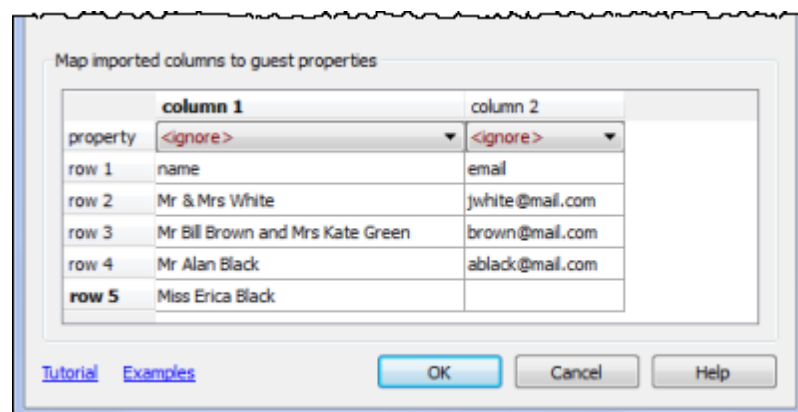
The data is now in a format PerfectTablePlan can read.

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

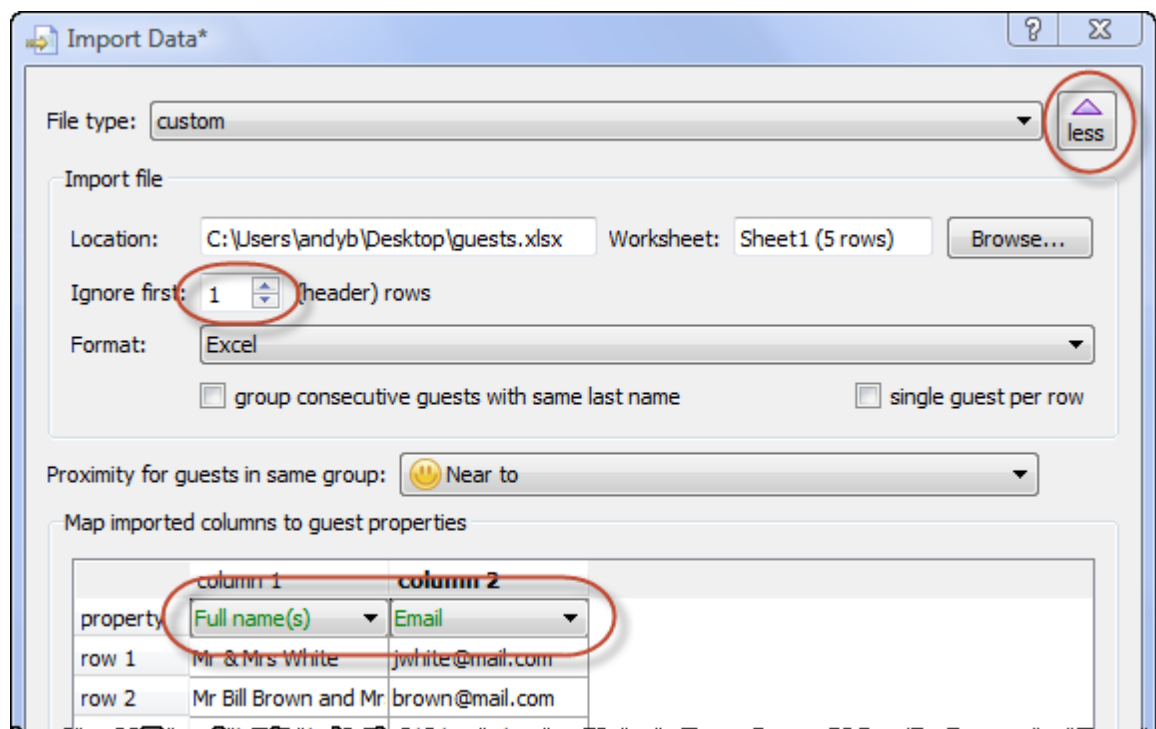
Select **File** > **Import**. The **Import** window will appear.



Ensure **Excel/CSV/text file** is selected and click the **OK** button. An **Open** window will appear. Navigate to the .xls/.xlsx/.csv file you just created and click **Open**. If a .xls/.xlsx file has multiple tabs you will be asked to choose one. You should now see the contents of the Excel file in the **Import Data** window.

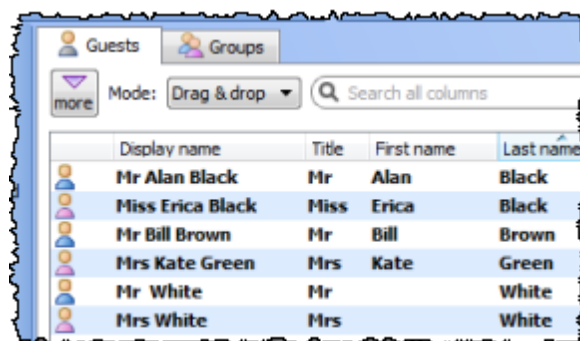


Click the button and tell PerfectTablePlan which columns correspond to which guest properties and to ignore the first row, as shown below.

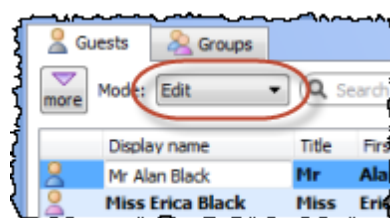


Note that you can edit the data in the table before you import it. This will not affect the original .csv file.

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



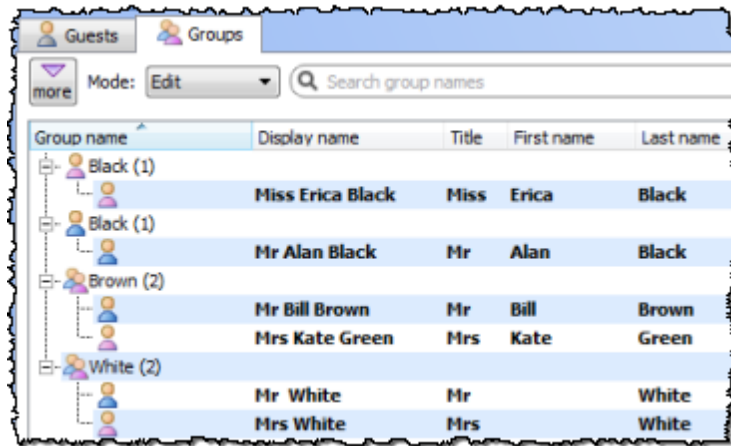
PerfectTablePlan has used [title preferences](#) to extract titles and to guess age and gender. If it has guessed anything incorrectly you can easily change it in **Edit** mode or **Edit>Undo** the changes.








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

It has also placed guests into groups.




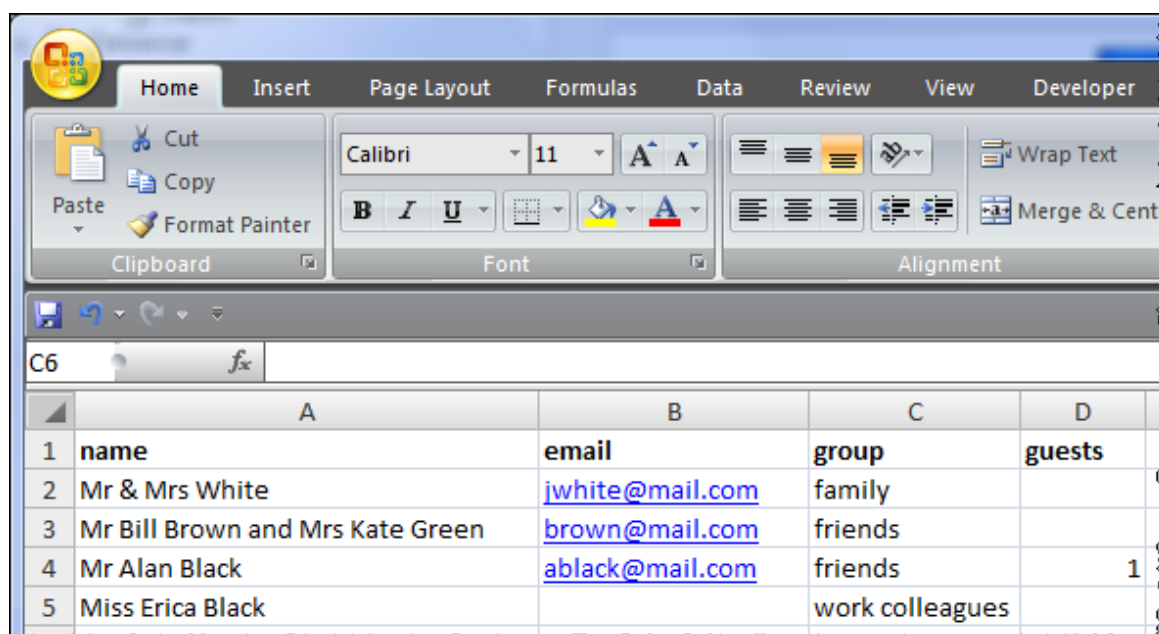
Group name	Display name	Title	First name	Last name
Black (1)	Miss Erica Black	Miss	Erica	Black
Black (1)	Mr Alan Black	Mr	Alan	Black
Brown (2)	Mr Bill Brown	Mr	Bill	Brown
Brown (2)	Mrs Kate Green	Mrs	Kate	Green
White (2)	Mr White	Mr		White
White (2)	Mrs White	Mrs		White

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 last name** in the **Import** window.

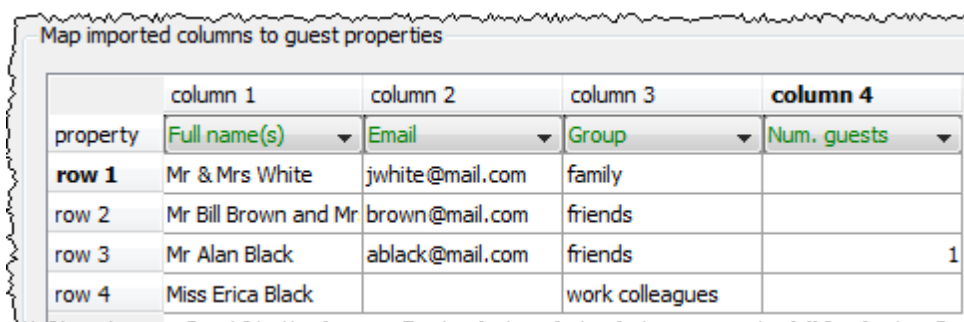
If you look in the  **Proximity** pane you will see it has set  proximity for the guests in each group.

If you want more control over groups you can add a group column to your spreadsheet.

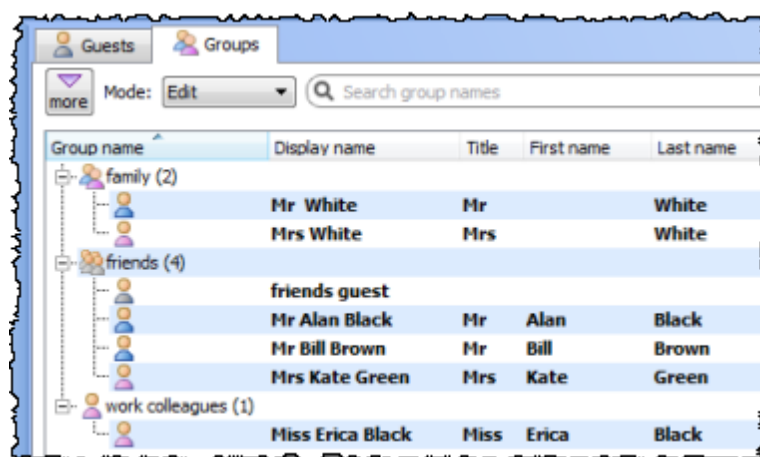
Select **File>**  **New** to clear the current plan. Click on **Don't save**. Add an additional group column and guest column to your spreadsheet, as below.



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

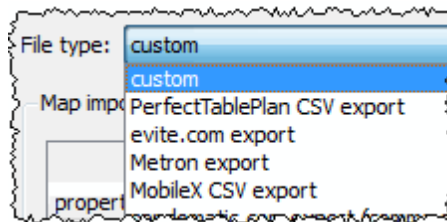




The guests have now been imported in the groups you specified and an unnamed guest has been added for Mr Alan Black.

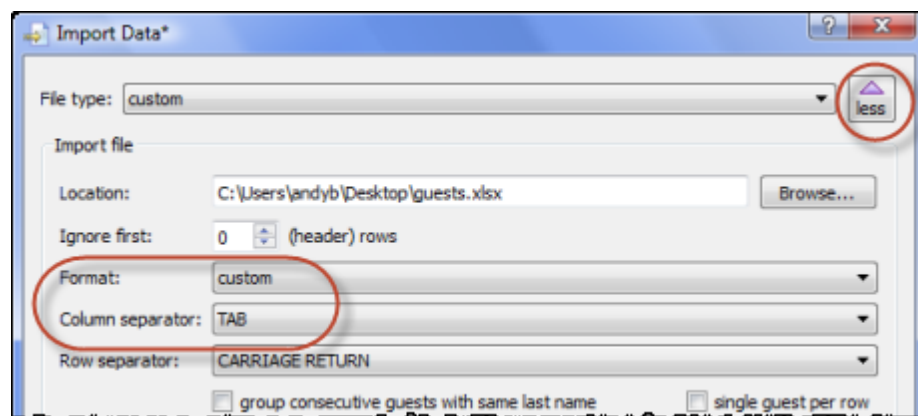


You can also import many other properties, such as addresses, meal choice, VIP status, RSVP status etc. . See [Import Data window](#) and [example import formats](#) for more details.

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) onto the PerfectTablePlan  **Guests** pane.

See also:

[Frequently Asked Questions](#)

[Movies](#)

[How do I?](#)

Next: [10. Check-in guests >>](#)

#### 1.4.11 10. Check-in guests

##### [Professional edition only](#)

You can check in guests by printing a barcode on their invitation, ticket or badge and then scanning this barcode into PerfectTablePlan as they arrive. This is much faster and less error prone than trying to find and update guest records by typing into PerfectTablePlan.

This is a step-by-step guide to using barcodes for checking-in guests.

### Requirements

1. A [barcode scanner](#) that emulates an extra keyboard. Usually this will plug into a USB port in your PC or Mac. You can buy them from around \$90/£70/€80 and quite a few different scanners are available. For more information see our [USB barcode scanners](#) web page. Note Most USB barcode scanners do not support 2-dimensional/matrix barcodes, such as [QR codes](#).
2. A [barcode font](#) installed on the PC or Mac you are going to use to print the barcodes. We recommend using barcodes that conform to the [code 39](#) standard (also known as code 3/9 or code 3 of 9). Free barcode fonts are available. For more information See our [barcode fonts](#) web page.
3. A [good quality printer](#) for printing the barcodes. Ideally a laser printer. But an inkjet printer might be OK if it has a high quality setting (often called 'Photo' or 'Image' quality).

4. A unique ID for each guest comprised of only barcode compatible characters. If you let PerfectTablePlan generate your guest Ids then you shouldn't have any problems.

### Guest Ids

PerfectTablePlan v5 will automatically create unique 15 character Ids comprised only of the hex characters 0-9 and A-F (NB/ upper case only). The ID is based on the time the guest was created (milliseconds since 1-1-1970) and the number of guests previously created on that computer, so it is very unlikely that 2 guests will ever have the same ID, even if they were created on different computers.

If you import your own guest Ids make sure that they contain only the following characters: 0-9, A-Z, \$%+-. / and space. Characters not in this set will be converted to - (minus). Characters a-z will be converted to upper case, so Ids mustn't differ only by case. Also try to keep the ID short (ideally 15 characters or less) to avoid the barcode becoming very large.

You will be warned if you try to print or export non-unique, blank or excessively long barcodes. PerfectTablePlan will give you the option to automatically reassign these Ids.

Note PerfectTablePlan V4 used 32 character Ids, which are too long for barcodes in most cases. If you open a v4 plan and try to print barcodes from it you will be given the option to replace the long Ids with shorter (but still unique) Ids.

## Step 1. Install a barcode font

Make sure you have installed a barcode font (see above).

## Step 2. Add barcodes to stationery

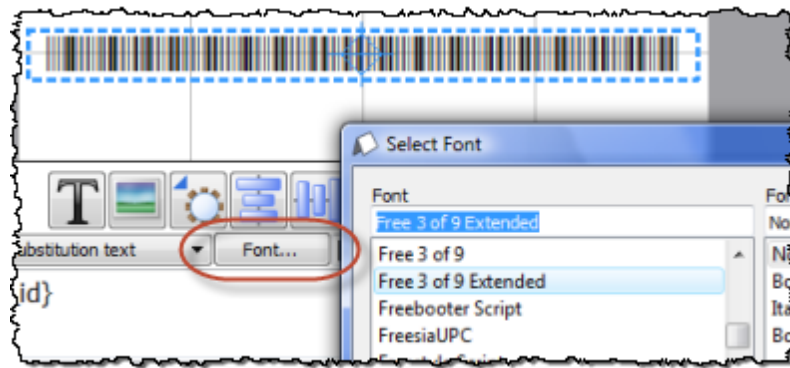
[Create your invitations, badges or tickets as usual](#) then add the substitution text:

- {guest\_barcode\_id} (if you are printing a stationery item per guest);  
or
- {group\_members\_barcode\_ids\_multi\_line} (if you are printing a stationery item per group)

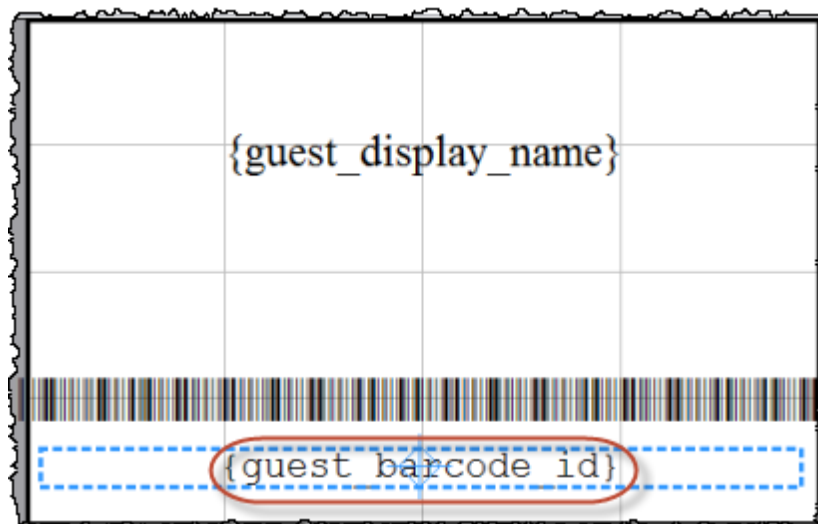


Do not select **Word wrap**.

Now set the substitution text to the barcode font you have installed. Set it to 20pt font size to start with. Don't worry if it is very long or mostly blank at this stage in the **Design** tab.

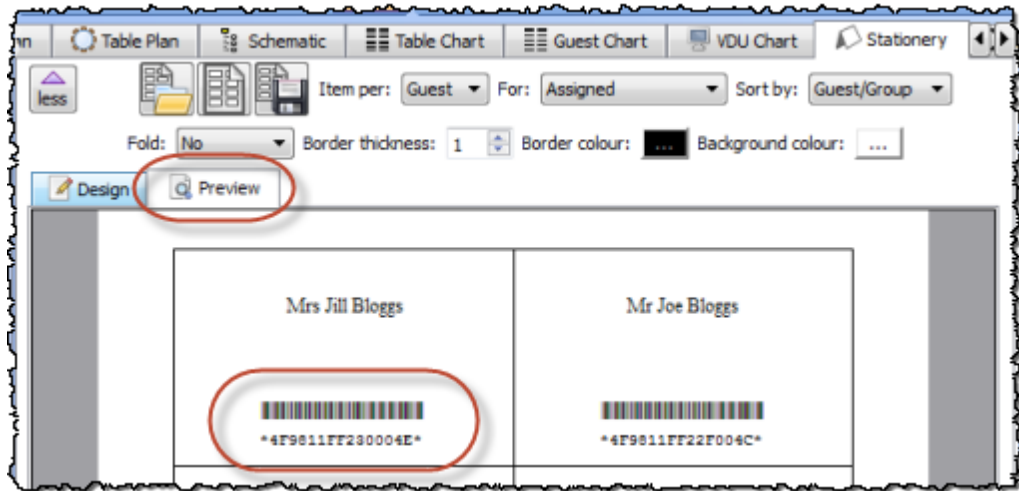


It might also be a good idea to include a human-readable version of the ID under the barcode. To do this just add `{guest_barcode_id}` again, but choose a normal (non-barcode) font this time. Ideally use a non-proportional font, such as Courier.



Make sure you leave some blank space around the barcode so it is easy for the scanner to read.

Now check the size of the barcodes in the **Preview** tab.



If the barcode is too big try increasing the size of the stationery. If that isn't possible, try decreasing the barcode font size.

### Font size

The size of the barcode is important as the USB scanner won't be able to read it if it is too small or too big. Code 39 typically requires at least 25 mm (1 inch) per 9 characters to be read reliably by a USB barcode scanner. We have found that a font size between 20pt and 25pt usually works well. The standard PerfectTablePlan barcodes are 17 characters (15 ID characters plus an asterisk either end), which is approximately 45 mm (1.75 inches) for a 20pt code 39 font (depending on the font).

## Step 3. Test a sample of your stationery

1. Select **File>Print**. You will be warned if you have non-unique, blank or excessively long guest barcode Ids and given the opportunity to allow PerfectTablePlan to fix this.
2. Click on the **Setup** button in the **Print** window.
3. In the **Print setup** window:
  - Change **Pages** so that only a single page is printed.



- Click on **Preferences** and change the print quality to the highest available.
- Click **Print**.

On the PC/Mac that you intend to use for checking-in guests:

1. Plug-in your USB barcode scanner into a USB port. Note Your PC/Mac might have to install a new device driver the first time you use the scanner.
2. Start PerfectTablePlan.
3. Load your plan file.
4. Select **File>|||||Check-In Guests**.

If the barcode cannot be read from the printouts, try the following:


- Increase the amount of white space around the barcode.
- Increase or reduce the barcode font size.
- Increase the quality of the printer print out.
- Change the background of the stationery to white.
- Change the colour of the barcode text to black.
- Use higher quality stationery.
- Test your barcode scanner on a barcode from another source (e.g. a tin of baked beans) to ensure that the scanner isn't defective. Note It might not be able to read some formats of barcode fonts.

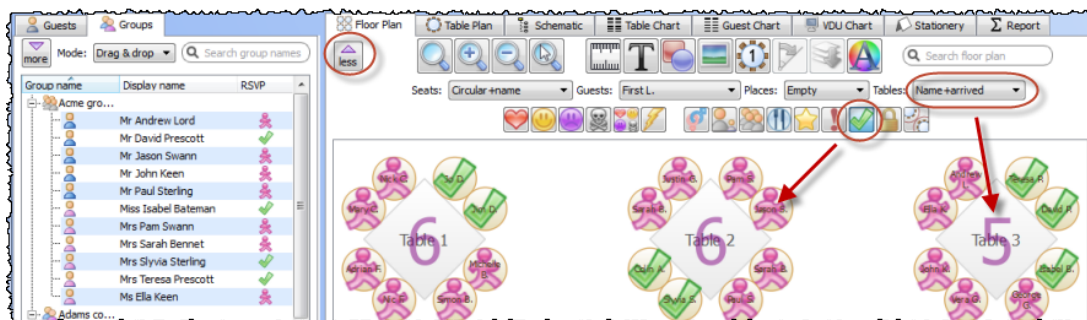
## Step 4. Print your stationery

Select **File>🖨️Print** and print all your stationery, making sure you still have the printer set to high quality.

Test a random selection (as in step 3) to ensure you can still scan them.

## Step 5. Check-in your guests


1. Set the  **Floor plan** pane to show RSVP status and/or number of guests arrived/unarrived at each table.



2. Select **File>Check-In Guests**.
3. Set the settings appropriately in the **Check-In Guests window**.
4. Click **Start checking-in>>**.
5. Scan guest barcodes with your barcode scanner.

## 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	People organizing	Charity organizers,	Professional event

	<i>their own wedding reception, party or bar/bat mitzvah</i>	<i>club secretaries and other frequent users</i>	<i>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	✓	✓	✓
Rectangular, Banquet, Head, Custom Circular, Semi-circular, Oval tables + rows of seats	✓	✓	✓
Add images to floor plan	✓	✓	✓
Add images to stationery	✓	✓	✓
Add background image to floor plan	✗	✓	✓
VDU chart	footer says 'seating by PerfectTablePlan.com'	footer says 'seating by PerfectTablePlan.com'	✓
E-shaped tables	✗	✓	✓
'You are here' maps in stationery	✗	✓	✓
Save import mappings	✗	✓	✓
Seat numbering	starts at 1 and proceeds clockwise	flexible	flexible
Save a plan as a template	✗	✓	✓

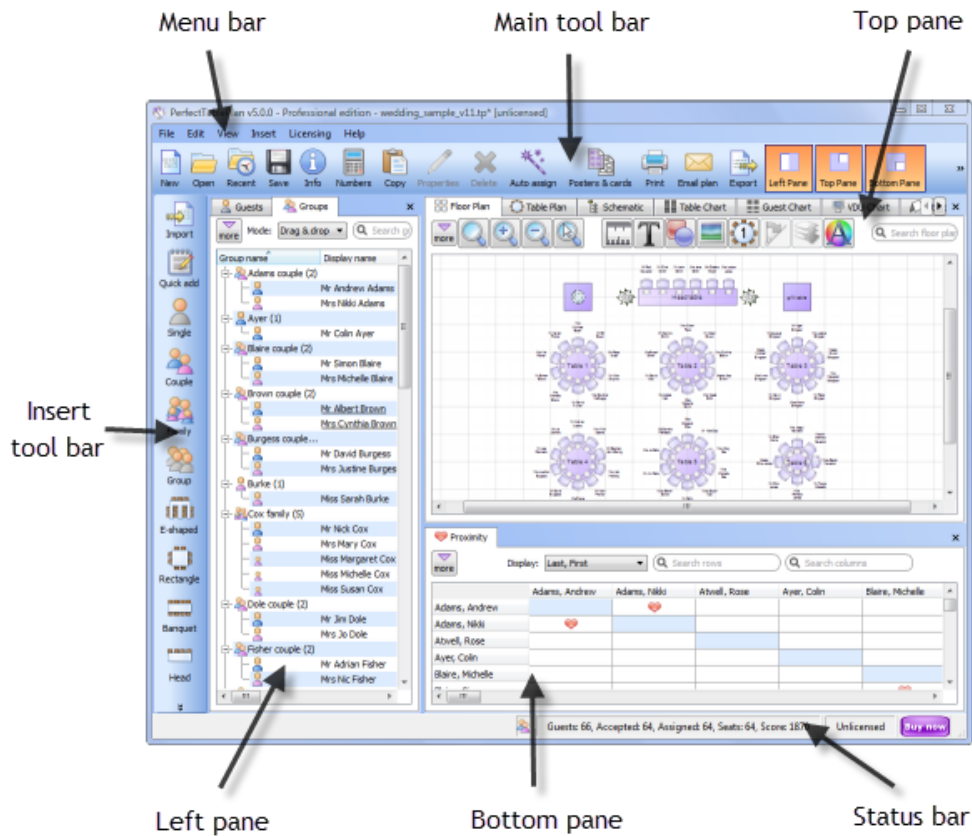
Custom guest fields	✗	maximum 2	maximum 20
Custom automatic seat assignment	✗	✗	✓
Unique record Ids	✗	✗	✓
Add barcoded Ids to stationery	✗	✗	✓
Check-in guests with a USB barcode scanner (scanner not included)	✗	✗	✓
Bulk edit proximity	✗	✗	✓
Table renumbering/renaming	one at a time	one at a time	Renumber/rename tables window
Import	guest data	guest data	guest + seating data + proximity data
Reports	summary troubleshooting	summary troubleshooting multi-plan (up to 3 plans)	summary troubleshooting multi-plan (up to 50 plans) detailed (summary) detailed (guests)
Price per user	<a href="#">see website</a>		

[Upgrade to a higher edition](#)

## 2 Reference

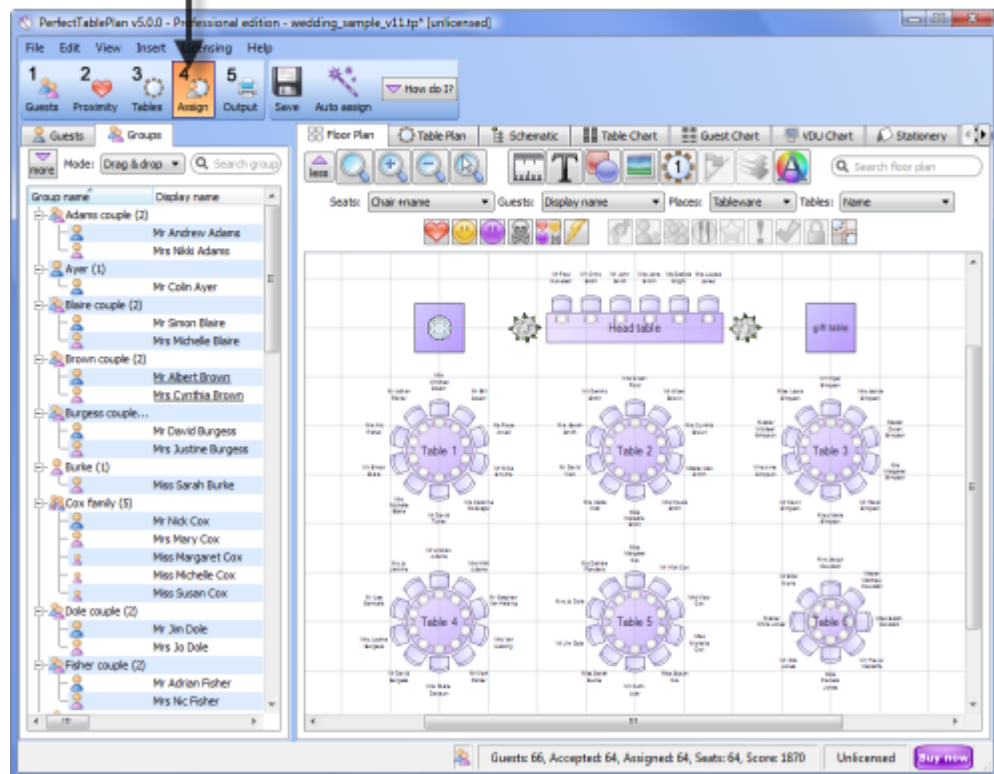
### 2.1 User interface

#### 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**, **Preferences** 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 commands are available as [keyboard accelerators](#), for example to access **File**> **Open** without using the mouse type *Ctrl+O*. Alternatively you can use menu accelerators, for example type *Alt-F-O* to access **File**> **Open**.

### 2.1.3 Task tool bar

The **Task** tool bar takes you through each step of creating a table plan. Depending on which step 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
1 	Step 1: Add guests to plan
2 	Step 2: Decide who to sit together/ apart
3 	Step 3: Add tables to plan
4 	Step 4: Assign guests to seats
5 	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 *Ctrl+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
	Open existing plan
	Open recently accessed plan



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








	Show list of tasks you might need help with
-----------------------------------------------------------------------------------	---------------------------------------------







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


### 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 *Ctrl+G* inserts a new single guest.

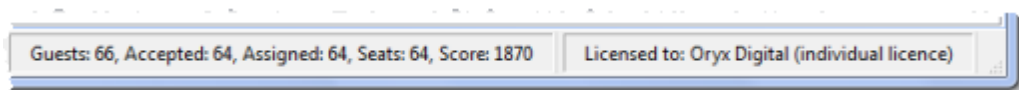
**Note** All of the **Insert** tool bar icons are only displayed if you have selected **View>User interface>Expert**. Otherwise only icons appropriate to the [current task](#) are displayed.

Button	Meaning
	Import guest information
	Quick add guests
	Insert single guest
	Insert guest couple
	Insert guest family
	Insert guest group
	Insert E-shaped table ( <a href="#">Advanced and Professional editions</a> only)


	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 with RSVP arrived (if > 0), 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.

Use *Ctrl+Tab* to cycle between the  **Guests** and  **Groups** panes.



### 2.1.7.2 Guests pane

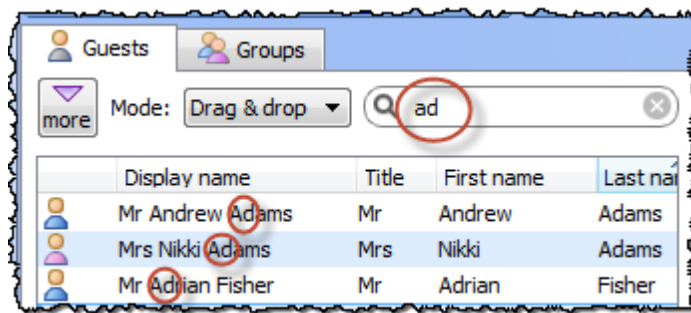
The  **Guests** pane shows all the guests in the current plan as individuals.

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 **ad** it will hide all guests without **ad** in their title, first name, last name or display name (case is ignored). Click the  cancel icon or press the *Esc* key to clear the field.



Click on the button to show additional controls.

If the **Floor plan** pane is displayed, check **mark guests in Floor plan** to show a marker next to the guest you are hovering the mouse cursor over.

Change the **Search in** drop-down list to control whether to search guest names or all columns (including any custom fields). Searching just names should be a bit faster. Hidden columns are not searched.

Check/uncheck column check boxes to show /hide columns.

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.

Right click on a guest to display actions in a pop-up menu.

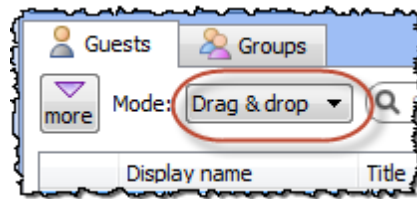
Note that changing the RSVP status of a guest from **Accepted** may unassign them from their seat, depending on your settings in the [Preferences window](#).

Drop a plan file from Windows onto this pane to open it. Drop a vCard, text or CSV file from Windows 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 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.

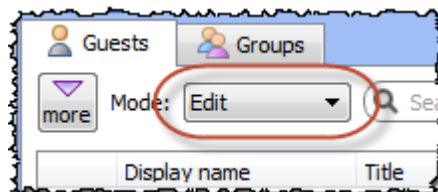
Edit guest properties by double-clicking on them or right click and select **Properties** from the pop-up menu.

Right 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 *Ctrl*+click. Use *Ctrl*+A to select everything in this pane.

## Edit




Click on a guest property to edit it.

Use the Enter, Tab or *Ctrl*+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](#)
- [Add custom fields](#)
- [Edit a property for multiple guests](#)
- [Importing guests](#)

### 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 ~~strike through~~ 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 or press the `Esc` key to clear the field.



Click on the  button to show additional controls.

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

If the  **Floor plan** pane is displayed, check **mark guests in Floor plan** to show a marker next to the guest you are hovering the mouse cursor over. If you hover over a group all the guests in the group will be marked.

Check/uncheck column check boxes to show/hide 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 from Windows onto this pane to open it. Drop a vCard, text or

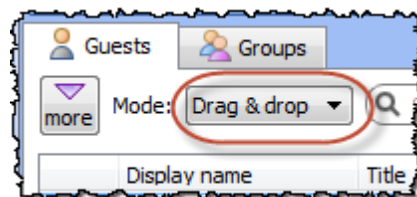
CSV file from Windows onto this pane to [import](#) it.

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.

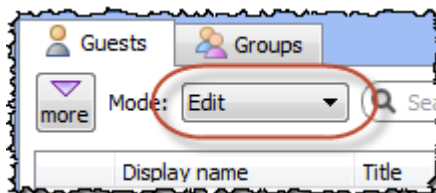
To change group membership left click on one or more guests or groups and drag them from one group to another within the [Groups](#) pane

Right 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 *Ctrl*+Click. Use *Ctrl*+A to select everything in this pane.

## Edit



Click on a guest or group property to edit it.

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












See also:

- [Move guests from one group to another](#)
- [Edit a property for multiple guests](#)
- [Importing guests](#)
- [Import guests in couples/families/groups](#)

## 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](#),  [VDU 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.


Use **Ctrl+Tab** to cycle between the panes (tabs) within the **Top** 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 holding down the right mouse button and dragging the background (the cursor will change to a hand).


Toggle the  button on/off to magnify the area under the mouse cursor. Magnification allows you to read a large plan without having to zoom in and out. You can change the size of the area magnified and the level of magnification


using the sliders in the **Configure magnification cursor** window that appears when you press the button in.

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


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


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


[Professional edition only](#)

Click the  **Renumber/rename table** button to [quickly rename lots of tables](#).



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](#).

**Note** If the name of a guest can't be fitted into the space available in the  **Floor Plan** pane the font will automatically be scaled smaller for that name to try to make it fit.

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 or press the *Esc* key 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 **Places** drop-down list according to whether you want the guest place setting to be **Empty**, show **Tableware** (plate+cutlery) or the **Seat number**. If you choose **Seat number** (small, medium or large) it will be shown in the same font as the table name, but automatically resized to fit. If the seat number is more than 2 characters long (e.g. because you have used the custom seat numbering available in the Advanced and Professional editions) it may be truncated or overlap other text.



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 guest will swap seat with the guest being dragged.

If you drag to the edge of the pane the pane will scroll automatically.

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


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


Check **Freeze floor plan** to prevent changes to the positions of tables, shapes, images and text items on this pane. Note that you can still reassign guests and change some item properties.

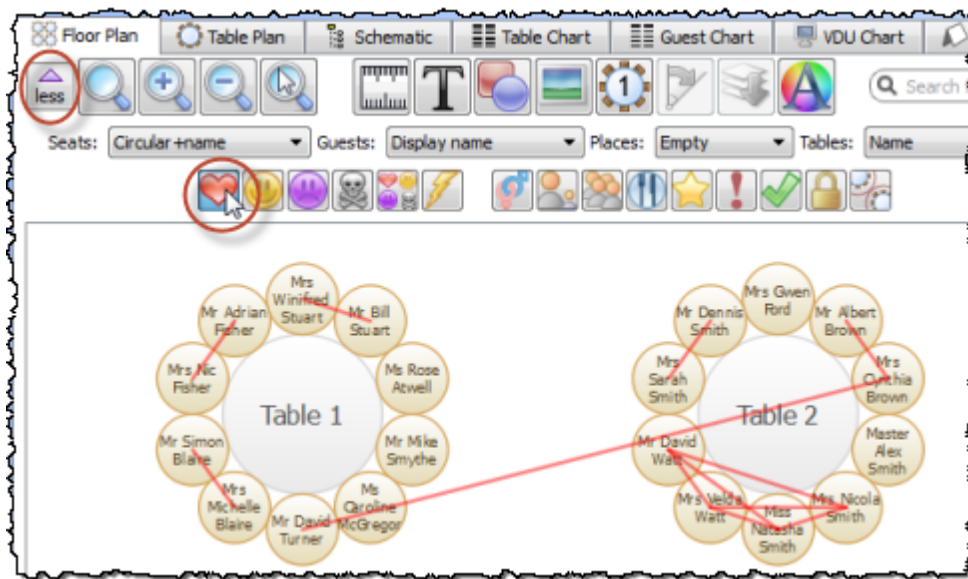
## Assessing your plan



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

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

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



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

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

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

Hold down the 🗺 button to show all guest proximities.

Hold down the ⚡ button to show potential seating issues, e.g. guests with ❤ proximity that aren't sitting next to each other.


Hold down the 🚩 button to show critical seating issues, e.g. guests that aren't sitting next to any of their ❤ proximity guests.

Hint If you hold down the *Shift* key while pressing any of the above 6 buttons, only the proximity for guests whose tables or chairs are selected will be shown. This can be very useful when showing the proximities of all guests is too confusing.


Depress the 🧑 button to colour code guest genders (blue for male, pink for female, grey for undefined).


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

Depress the  button to colour code which groups guests belong to.


Depress the  button to show colour-coded meal choices. Each meal is displayed in a different colour. 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.


You can also [colour code guests by custom field](#).


Note The visualization colours are chosen automatically by default. We have chosen the 12 default colours to be easily distinguishable, even for people with most types of colour blindness. But you can change these colours in the  [Visualization colours window](#).


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.

Depress the  button to show spacings around each table (but not rows of seats).

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 *Ctrl* key to zoom, and vice versa. If you have set the mouse wheel to scroll horizontally, hold down the *Alt* 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](#).

**Note** If the name of a guest can't be fitted into the space available in the  **Table Plan** pane, the font will automatically be scaled smaller for that name to try to make it fit.

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.

Select from the **Places** drop-down list according to whether you want the guest place setting to be **Empty**, show **Tableware** (plate+cutlery) or the **Seat number**. If you choose **Seat number** (small, medium or large) it will be shown in the same font as the table name, but automatically resized to fit. If the seat number is more than 2 characters long (e.g. because you have used the custom seat numbering available in the Advanced and Professional editions) it may be truncated or overlap other text.

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

Note The legend will display an **Event:** header if the **Event** field is set in the [Information window](#).

## Changing the Table plan

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

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

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

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

## Assessing your plan





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


When you hover the mouse cursor over a table or assigned seat a tool tip window with 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 potential seating issues, e.g. guests with  proximity that aren't sitting next to each other on this table.

Hold down the  button to show critical seating issues, e.g. guests that aren't sitting next to any of their  proximity guests on this table.


Hint If you hold down the *Shift* key while pressing any of the above 6 buttons, only the proximity for guests whose chairs are selected will be shown. This can be very useful when showing the proximities of all guests is too confusing.

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


Depress the  button to colour code guest genders (blue for male, pink for female, grey for undefined).


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

Depress the  button to colour code which groups guests belong to.


Depress the  button to show colour-coded meal choices. Each meal is displayed in a different colour. 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.


You can also [colour code guests by custom field](#).


Note The visualization colours are chosen automatically by default. We have chosen the 12 default colours to be easily distinguishable, even for people with most types of colour blindness. But you can change these colours in the  [Visualization colours window](#).

Depress the  button to show VIP guests and VIP tables.

Depress the  button to show guests with special needs.


Depress the  button to show guest RSVP status.

Depress the  button to show locked guests.

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

Click the **Terms** button to change the words used in the 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 *Ctrl* key to zoom, and vice versa. If you have set the mouse wheel to scroll horizontally, hold down the *Alt* 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 ~~striketrough~~ 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 the **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 or press the *Esc* key 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](#). Note that a '[smoothing](#)' function is applied to the total for each guest before the grand total is calculated.

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 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 right click and select **Properties** from the pop-up menu.

Right 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 *Ctrl*+Click. Use *Ctrl*+*A* to select everything in this pane.

## Edit

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


Use the *Enter*, *Tab* or *Ctrl*+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**.

Note If you set **By** to **Group** you can control how group member names are displayed using the **Display group members as** field in the **Names** tab of the  **Preferences** window.

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 the  or  buttons to paste the chart into Microsoft Word or Excel. You must have Microsoft Word or Excel installed.


Click on the  button to show additional options.



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

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

The order of the tables can be changed by clicking on the **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 stationery 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 *Ctrl+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**.


Note If you set **By** to **Group** you can control how group member names are displayed using the **Display group members as** field in the **Names** tab of the  **Preferences** window.

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 the  or  buttons to paste the chart into Microsoft Word or Excel. You must have Microsoft Word or Excel installed.


Click on the  button to show additional options.


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


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

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 stationery 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 *Ctrl+A* to select everything in this pane.

See also:

- [Print a guest list](#)


### 2.1.8.7 VDU Chart pane

The  **VDU Chart** pane shows a scrolling list of guest seat assignments. It is possible to show this pane in full screen mode. This can be very useful for displaying on a VDU or plasma screen at venue. But we strongly recommend you test this before an event to ensure that your hardware/software is compatible with the screen and you have the correct cable.



It is not possible to change the plan from this pane.


Change the **Display** drop-down list to change the information displayed for each guest. The guests are always ordered by last name. Anonymous guests are not shown.

Change the **Columns** to change the number of columns of guest information displayed.


Change the **Text width** to change the percentage of the width occupied by scrolling text. The remainder will display the floor plan. Set it to 100% to hide the floor plan. The image shown is a simplified version of your floor plan. To change the colour or other properties of the floor plan (including the seat number font size) go to the  [Floor Plan pane](#).

Move the **Speed** slider right to increase the scrolling speed and left to decrease the scrolling speed.

Click the  button to start the text scrolling and the  button to pause it (only one of these is visible at any time).

Click the  button to display this pane full screen. Press any key or click the

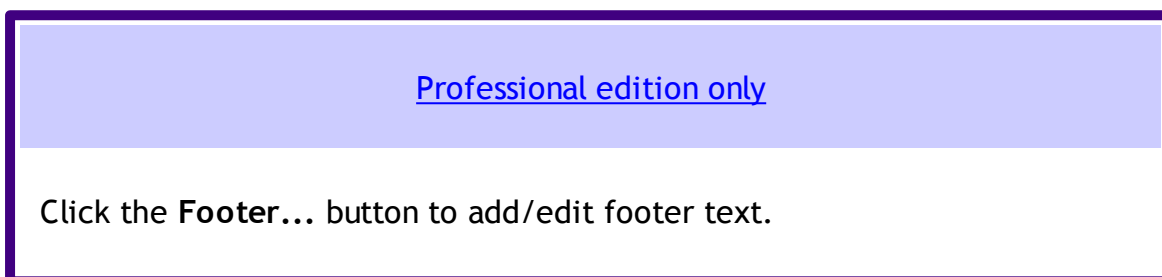
mouse to exit full screen mode.

Click on the  button to show additional options.

Click the **Text** font drop-down list, size edit or colour button to change the font, size or colour of the scrolling text. Check **auto size** to have the font size set automatically.

Click the **Background** colour button to change the background colour of the pane.

Click the **Title...** button to add/edit title text.




Click the **Terms...** button to change the column headers used (e.g. to another language).



 [Video with audio \(2:17 minutes\)](#)

See also:

- [Assign \(or reassign\) seats in real time](#)
- [Display seating on a VDU or plasma screen](#)

#### 2.1.8.8 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).


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


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



## 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** to 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

Click on the **Insert text** button to [add text and merge guest data](#).

Click on the **Insert image** button to [add a graphic/image/clipart](#).

Click on the **Colour spot** button to [add a colour coded spot](#).

### [Advanced and Professional editions only](#)

1. Click on the **You are here** button to [add a personalised map](#).

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

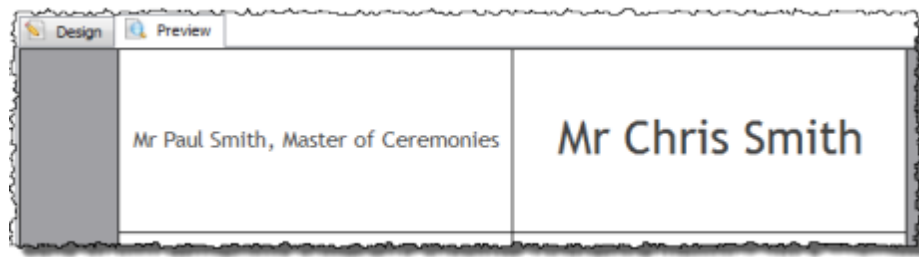
Click on the **Rotate** button to rotate the selected text 90 degrees.

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** field or the **Italic**, **B Bold** and **U Underline** buttons. Note PerfectTablePlan will automatically reduce the font size to try to keep it within a stationery item.



The font size has been automatically reduced to fit for the left hand stationery item

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.

Click on the **Word wrap** button to allow line breaks to be added where text is too long to fit within the stationery. If this isn't sufficient to fit the text within the stationery, the font size may be automatically reduced as well.

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'
{current_date}	The current date in your local format	31/12/2009	Guest, group or Table
{current_time}	The current time in 24 hour format	13:59:00	Guest, group or Table
{event_date}	event date from  <a href="#">Information window</a>	31/1/2010	Guest, group or Table
{event_name}	event name from  <a href="#">Information window</a>	Gala dinner	Guest, group or Table
{event_notes}	event notes from  <a href="#">Information window</a>		Guest, group or Table
{event_venue}	event venue from  <a href="#">Information window</a>	The Crown hotel	Guest, group or Table
{group_address}	the address of the group	1 The Street The Town Nowhereshire NW1 123 England	Guest or Group

{group_address1}	line 1 of the group address	1 The Street	Guest or Group
{group_address2}	line 2 of the group address		Guest or Group
{group_country}	the address country	England	Guest or Group
{group_contact}	full contact details of group (address + contact numbers)	1 The Street The Town Nowhereshire NW1 123 England 111-1111-1111 email@email.com	Guest or Group
{group_email}	email address	email@email.com	Guest or Group
{group_home_phone}	home phone number	111-111-1111	Guest or Group
{group_meals}	meals of group members	fish + beef	Guest or Group
{group_members_barcode_ids_multi_line}	list of group member guest ids in a form suitable for a code 39 barcode, one per line with blank lines between	*1234567890* *2345678901*	Guest or Group

	(Professional Edition only)		
{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 or Mr & Mrs John Smith (depending on the setting of the <b>Display group members as</b> field in the <b>Names</b> tab of the <b>Preferences</b> window)	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_num_members}	number of members of the group	2	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	table 1	Guest or group

	assigned to		
{group_table_sections}	the table section(s) the group is assigned to - blank if not an E-shaped table (Advanced and Professional Editions only)	A & B	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_barcode_id}	guest id in a form suitable for a code 39 standard barcode (Professional Edition only)	*0123456789*	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**2}	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_suffix}	guest suffix	PhD	Guest
{guest_table_section}	table section guest assigned to - blank if not an E-shaped table (Advanced and	A	Guest




	Professional Editions only)		
{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_line}	list of guests at table, one guest per line	Mr J Smith Mrs K Smith	Table
{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

{table_num_seats}	number of seats for the table	8	Table
{table_shape}	table shape	Circular	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 set **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](#)
- [Merge guest names into stationery](#)
- [Load sample stationery](#)
- [Create address labels](#)

### 2.1.8.9 Report pane


The  **Report** pane shows reports of your plan. It is not possible to make changes to the plan from this pane.


**Type** is the type of report:

Report type	Description	Example usages	Editions available
Summary	An overall summary of the current plan	<ul style="list-style-type: none"> <li>• how many guests have accepted their invitation</li> <li>• how many males vs females</li> <li>• how many of each meal have been ordered by guests</li> </ul>	all


<b>Troubleshooting</b>	Identifies issues that may need attention in the current plan	<ul style="list-style-type: none"> <li>• guests with 'Not near to proximity' that have been placed on a table together</li> <li>• tables with duplicate names</li> <li>• groups with no guests</li> </ul>	all
<b>Multi-plan</b>	Shows where guests were seated across multiple plans	<ul style="list-style-type: none"> <li>• which events Mr John Smith attended and who he sat next to at each event</li> <li>• any guests without 'near to' or 'next to' proximity who have sat next to each other at 2 or more events</li> </ul>	Advanced (up to 3 plans) and Professional (up to 50 plans)
<b>Detailed (summary)</b>	A detailed summary of a particular aspect of the current plan	<ul style="list-style-type: none"> <li>• how many guests ordered each meal by table</li> <li>• total of 'amount owing' custom field by group</li> </ul>	Professional
<b>Detailed (guests)</b>	Similar to a <b>Detailed (summary)</b> report, but also lists guest names	<ul style="list-style-type: none"> <li>• which guests ordered each meal by table</li> <li>• the names of guests listed by special requirement and table</li> </ul>	Professional



Click the **Terms...** button to change the words used in the report (e.g. to another language). Note that not all text can be replaced in all reports.

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.

Click the  or  buttons to paste the report into Microsoft Word or Excel. You must have Microsoft Word or Excel installed.

## Summary report

The summary report gives overall statistics for your plan.

## Troubleshooting report

The trouble shooting report checks for the following 40 potential issues in your plan. If there are more than 100 results for any one issue, only the first 100 will be displayed for brevity.

For the purposes of the report seated 'next to' means the seat to the immediate left or right and seated 'near to' means on same table, table section (for E-shaped tables) or row of seats.

Issue	Notes	Reported
Empty guest Ids		Professional edition only
Duplicate guest Ids	case insensitive  the number of duplicates is shown in brackets	Professional edition only
Duplicate guest Title +First+Last names	case insensitive  the number of duplicates is shown in brackets	always
Duplicate guest display names	case insensitive	always

	the number of duplicates is shown in brackets	
Guests without titles		if $\geq 75\%$ of guests have titles
Guests with gender different to title default	The default gender for a title is set in 'Titles' tab of the 'Preferences' window	always
Guests with age different to title default	The default age for a title is set in 'Titles' tab of the 'Preferences' window	always
Guests with undefined gender		if $\geq 75\%$ of guests have defined genders
Guests with unset RSVP		if $\geq 75\%$ of guests have RSVP set
RSVP Declined/Cancelled guests assigned to seats		always
RSVP Accepted/Arrived guests not assigned to seats		always
Assigned VIP guests not at VIP tables		if 1 or more VIP tables
Assigned guests without meals		if $\geq 75\%$ of assigned guests have meals set
Proximity 'Next to' guests not seated near to each other	unassigned guests are ignored	always
Proximity 'Next to' guests	unassigned guests are	always

seated near but not next to each other	ignored	
Proximity 'Near to' guests not seated near to each other	unassigned guests are ignored	always
Proximity 'Not near to' guests seated next to each other	unassigned guests are ignored	always
Proximity 'Not near to' guests seated near but not next to each other	unassigned guests are ignored	always
Proximity 'Not next to' guests seated next to each other	unassigned guests are ignored	always
Proximity 'Not next to' guests seated near but not next to each other	unassigned guests are ignored	always
Guests with all 'Next to' and 'Near to' proximities unfulfilled	<p>guest has at least 1 'Next to' or 'Near to' proximity set but none of these proximities are satisfied</p> <p>the number of 'next to' and 'near to' proximities unfulfilled is shown in brackets</p> <p>unassigned guests are ignored</p>	always
Guests with all 'Next to' proximities unfulfilled	guest has at least 1 'Next to' proximity set but none of	always

	<p>these proximities are satisfied</p> <p>the number of 'next to' proximities unfulfilled is shown in brackets</p> <p>not shown if displayed in "All 'Next to' and 'Near to' Proximities unfulfilled"</p> <p>unassigned guests are ignored</p>	
Guests with no proximity	unassigned guests are ignored	if $\geq 75\%$ of assigned guests have proximities set
Guests with >2 'Next to' proximities	<p>a guest can only sit next to a maximum of 2 other guests</p> <p>unassigned guests are ignored</p>	always
Guests with >n 'Next to' and 'Near to' proximities	<p>if the biggest table is 10 seats then a guest can only sit next to or near to a maximum of 9 other guests</p> <p>unassigned guests are ignored</p>	if there is at least 1 table
Duplicate group names	<p>case insensitive</p> <p>the number of duplicates is shown in brackets</p>	always
Groups with no		always

members		
Groups with anonymous members	the number of anonymous members is shown in brackets	always
Groups with incomplete contact details	groups with the 'Address 1' or 'City' contact fields not set	if $\geq 75\%$ of groups have contact details set
Duplicate table names	case insensitive  the number of duplicates is shown in brackets	always
Tables with empty seats	the number of empty seats is shown in brackets	if $\geq 75\%$ of tables have no empty seats

 [Video with audio \(1:10 minutes\)](#)

### Advanced and Professional editions only

## Multi-plan report

Click the **Choose plans...** button to select which plans to include in your report. The [Choose plans window](#) will appear. The maximum number of plans [depends on which Edition of PerfectTablePlan you have](#).

In the Professional edition you can select from the **Match by** drop-down list depending on whether you want to match guests between plans by their ID or name (Title+First name+Last name, case is ignored). In the Advanced edition guests are always matched between plans by name.

Note Guests will only have the same ID if:

1. You copied a plan (e.g. using **File>Save As**); or



2. You imported the same ID for the same guest to multiple plans.

Check the **detailed** check box if you want to include a detailed report on each guest (this can make the report very long).

Click **Go** to create the report.

#### Professional edition only

### Detailed (summary) and Detailed (guests) reports

**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'.

 [Video with audio \(0:40 minutes\)](#)

## 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 *j*o in the  **Search row** field it will hide all rows for guests without *j*o in their name (case is ignored). Click the  cancel icon or press the *Esc* key 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 single 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](#).


#### [Professional edition only](#)

Click on the **Bulk Edit...** button to update large numbers of proximities in a single operation in the [Bulk Edit Proximity window](#).

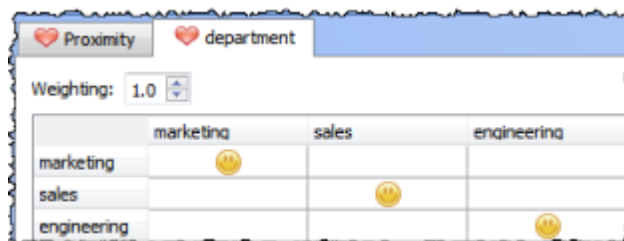
 [Video with audio \(1:08 minutes\)](#)




### 2.1.9.3 Custom Field Proximity pane

#### [Professional edition only](#)

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

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 to seat people in the same department together or not together.



	marketing	sales	engineering
marketing			
sales			
engineering			

You can set multiple custom proximities at the same time. E.g. you could seat guests together (or apart) depending on their geographical area, seniority and department.

The [automatic seat assignment score](#) is multiplied by the value of the **Weighting** field. This can be useful to set the relative importance of different custom field proximities. E.g. The score of 2 ❤️ **Next to** proximity guests seated next to each other is usually +20, but if the **Weighting** is set to 0.5 it will be +10. The score is rounded to the nearest whole number.

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

 [Video with audio \(1:04 minutes\)](#)

## 2.1.10 Windows

### 2.1.10.1 Windows

Help on the following windows is available:

[About window](#)

[Bulk Edit Proximity window](#)

[Change Group window](#)

[Chart Title/Footer window](#)

[Check-In Guests window](#)

[Choose plans window](#)

[Custom Field window](#)

[Custom seat numbering window](#)

[Dimensions window](#)

[Edit Guest Property window](#)

[Export window](#)

[Export Data window](#)

[Export PDF window](#)

[Export VCard window](#)

[Find Plan Files 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](#)

[Page Setup window](#)

[Preferences window](#)

[Print window](#)

[Print Setup window](#)

[Quick Add Guests window](#)

[Renumber/rename tables window](#)

[Save Stationery Layout window](#)

[Select Gradient window](#)

[Select Groups window](#)

[Select Guests window](#)

[Select Texture window](#)

[Shape Properties window](#)

[Split Columns window](#)

[Stationery Layout window](#)

[Table Order window](#)

[Table Properties window](#)

[Table Section Properties window](#)

[Text Properties window](#)

[Visualization colours window](#)

### 2.1.10.2 About window



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

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

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

### 2.1.10.3 Bulk Edit Proximity window

#### [Professional edition only](#)

The **Bulk Edit Proximity** window allows you to change large numbers of proximities in a single operation. For example you can set the proximity of all guests seated at the same table to 'not next to'. You can also restrict what values of existing proximity are changed. For example you can change only 'neutral' proximities, so that existing proximities are not affected. This makes it much easier to update proximities across multiple events, e.g. to only have couples sitting next to each other at [consecutive events](#). To display this window Click on the  button at the top-left of the  **Proximity** pane and then click on the **Bulk Edit...** button.

Set the **Change proximity for** drop-down list according to which guests you want to change the proximity for. For example, select Guests seated next to each other to change the proximity for each pair of guests sat next to each other.


Set the **With proximity** drop-down list according to which proximity values you want to change. For example, you might only want to change proximities that are currently neutral so that you don't overwrite existing proximities.

Set the **To proximity** drop-down list to the next proximity.

The number of changes that will be made is displayed. Click **OK** to accept the changes. Click **Cancel** to discard the changes.



 [Video with audio \(1:08 minutes\)](#)

#### 2.1.10.4 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** or double click on the new group.


Note You can also change the group of a guest by dragging and dropping them from one group to another in the  [Groups pane](#) or by setting the  [Guests pane](#) **Mode** to **Edit** and editing the **Group** column.

#### 2.1.10.5 Chart Title/Footer window

The **Chart Title/Footer** window allows you to change the title or footer displayed in the  [Table Chart](#) ,  [Guest Chart](#) or  [VDU chart](#) panes. 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.

In the  **Table chart** or  **Guest chart** pane set the size of the text relative to the rest of the text in the pane using the **Size** drop down list. +4 is the largest text and -4 is the smallest text.

In the  **VDU chart** pane set the font family and font size using the appropriate controls.

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





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


Click **OK** to accept the changes. Click **Cancel** to discard the changes.

We would really appreciate a mention of [www.perfecttableplan.com](http://www.perfecttableplan.com) in the footer!

#### 2.1.10.6 Check-In Guests window

##### Professional edition only

The  **Check-In Guests** window allows you to quickly [check-in guests at your event using a barcode scanner](#). To display this window select **File> Check-In Guests...**

Check **set guest RSVP to** and the appropriate status if you want to change the RSVP status of guests as they check-in (typically you will want to set it to  arrived).

Check **append to guest notes** and the appropriate text if you want to append some text to the **Notes** field of each guest checked in. For example, you might want to add "Scanned by Jim". Check **with timestamp** to add a timestamp to the entry.

Check **show guest details** if you want to show the guest details on-screen as they are checked in.

Check **requires confirmation** if you want to confirm each check-in e.g. before updating guest RSVP status and/or notes.

Check **audible feedback** if you want the computer to beep each time a guest ID is successfully scanned and matches the guest database.

Click **Start checking-in>>** when you are ready to start checking-in guests.

**Guest ID** is where guest IDs are input via a barcode scanner. You can also manually type in a guest ID here and press the *Return* key, but a barcode scanner is a lot more efficient.

**Guest** displays all the information about the last guest scanned. Click on the **Edit guest** button to edit this information. Click on **Clear** to clear this information.

**Stats** shows up-to-date statistics on your plan.

Click **<<Change settings** to go back and change the settings.

Click **Close** to close this window.

See also:


- [Checking-in guests](#)
- [Check-in guests tutorial](#)
- [Assigning \(or reassigning\) seats in real time](#)

#### 2.1.10.7 Choose Plans window

##### [Advanced and Professional editions only](#)

The **Choose plans** window allows you to choose plans for the **Multi-plan** report in the [ΣReport pane](#). The plans will be listed in the report in the same order they are displayed in this window. The maximum number of plans [depends on which Edition of PerfectTablePlan you have](#).

Check/uncheck **include current plan** to include or exclude the current plan.

Click  **Add** to add one or more plans.

Click  **Delete** to delete the selected plan(s).

Click  **Up** to move the selected plan(s) up one row.

Click  **Down** to move the selected plan(s) down one row.

Click **OK** to choose these plans and close the window. Click **Cancel** to discard the changes.

### 2.1.10.8 Custom Fields window

#### Advanced and Professional editions only

The **XCustom Fields** window allows you to define your own properties for guests. 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 **XDel** 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
<b>Name</b>	The name of the custom field (maximum 20 characters). No two custom fields can have the same name.
<b>Type</b>	The type of field (see below).
<b>Allowed values</b>	The values the field can take. The user can only set this for Selection types.
<b>Default value</b>	The value set by default for new and existing guests.

<b>Notes</b>	Notes on the field. This appears as a tooltip when you hover over the corresponding control.
--------------	----------------------------------------------------------------------------------------------

The types of custom field are:

Field type	Allowed values
<b>Yes/No</b>	Yes or No.
<b>Text</b>	Any text.
<b>Number</b>	Any whole number (integer) between -2,147,483,648 and 2,147,483,647.
<b>Currency</b>	Any floating point number between -21,474,836.48 and 21,474,836.47. Accurate to two decimal places.
<b>Selection</b>	One of a comma separated list of items defined in the <b>Allowed values</b> column.
<b>Tags</b>	0, 1 or many comma separated items.

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.

See also:

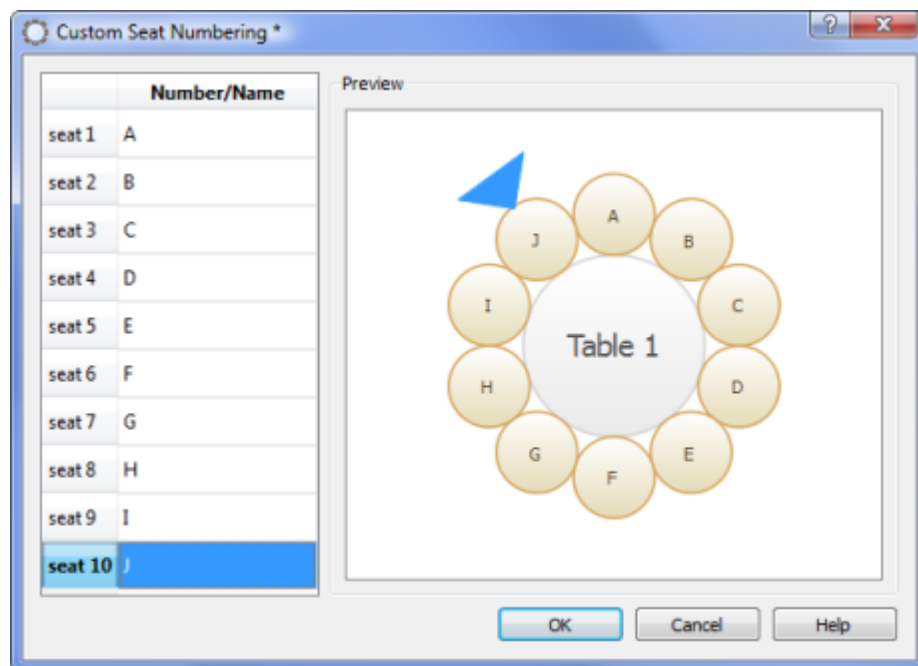
- [Custom fields](#)

#### 2.1.10.9 Custom Seat Numbering window

[Advanced and Professional editions only](#)

The **Custom seat number** window allows you to set custom seat numbering for a table or row of seats. To display this window set **Seat numbers** to **custom** or click the **Change...** button in the [Table properties window](#).

The seats are shown in order from the first seat and proceed clockwise. You can use the cursor keys to move up and down. A **Preview** of the changes is shown, with a marker pointing to the seat currently being edited.



Click **OK** to accept the changes. Click **Cancel** to discard the changes.

#### 2.1.10.10 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 m<sup>2</sup> or ft<sup>2</sup> (depending on your choice of units).

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


choice of units).

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

seating type	comfortable space per guest		minimum space per guest	
	ft <sup>2</sup>	m <sup>2</sup>	ft <sup>2</sup>	m <sup>2</sup>
all standing	7	0.7	5	0.5
all seated, rectangular tables	11	1	8	0.7
all seated, circular tables	14	1.3	11	1


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

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

Check **Draw grid** if you would like a visible grid to be drawn in the  **Floor Plan** pane. If checked you can set the drawn grid **Size** in the chosen units. Every fifth line is shown darker to make it easier to count grid squares.


Check **include in print/copy/export** if you would like to include grid lines when you print, export or copy to the clipboard.

Note Printing/exporting a fine grid (e.g. each foot) in a large room can slow down print/export 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 to 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 editions 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

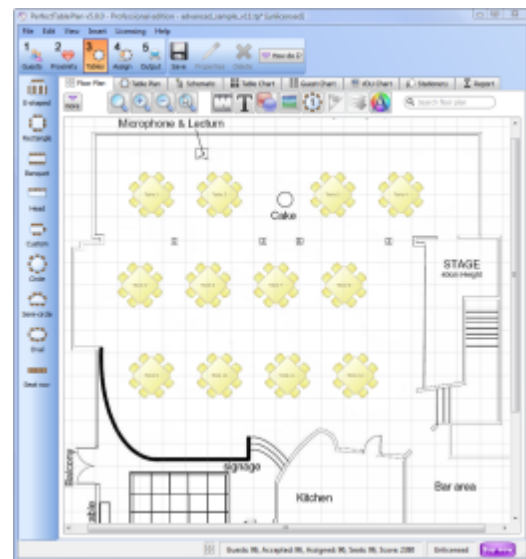


image used as floor plan background with tables added

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).

If you aren't sure of the size of your image in metres, [add a shape](#) the same size as a known feature in your background image. Then change

**Background image size** until the feature is the same size as the shape you added. For example, if there is a 5 metre scale on your image, add a 5 metre rectangle then vary **Background image size** until the scale and shape are the same size.

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 MSPaint or 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.

See also:

- [Space tables correctly](#)

#### 2.1.10.11 Edit Guest Property window

The **Edit Guest Property** window allows you to change a guest property (e.g. title, meal choice or RSVP status) for multiple guests in a single operation. To display this window select the guests you wish to edit in the  **Guests**,  **Groups**,  **Floor plan**,  **Table plan** or  **Schematic** panes and then select a sub-menu under **Edit>Guest Property** containing '...'.

Note Selecting a table in the  **Floor plan**,  **Table plan** or  **Schematic** panes will select all the guests on that table. Selecting a group in the  **Groups** pane will select all guests in that group.

The display names of the guests selected will be displayed (up to 10) and the property to edit. If the guests have more than one value for this property <<varies>> will be displayed. <<varies>> is not an acceptable value to set.



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



See also:

- [Edit a property for multiple guests](#)

### 2.1.10.12 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.

Check **display the document** to display the document after export. The viewing application will be chosen by Windows.

Check **display the folder containing the document** to display the folder exported to in Windows Explorer.

Check **copy the document location to the clipboard** to copy the location of the exported document as text to the Windows clipboard.



Check **create a new email with the document added** to compose a new email with the exported document added as an attachment or a hyperlink. PerfectTablePlan will attempt to create a new email using your default Windows email application. This is not always possible, depending on how your email is set-up.

Click **OK** to export the document. Click **Cancel** to cancel the export.

See also:

- [Export formats](#)

### 2.1.10.13 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 customized 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.

Note The **members (formal)** output is affected by the setting of the **Display group members as field** in the **Names** tab of the  [Preferences window](#).


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

See also:

- [Export formats](#)

### 2.1.10.14 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](#).

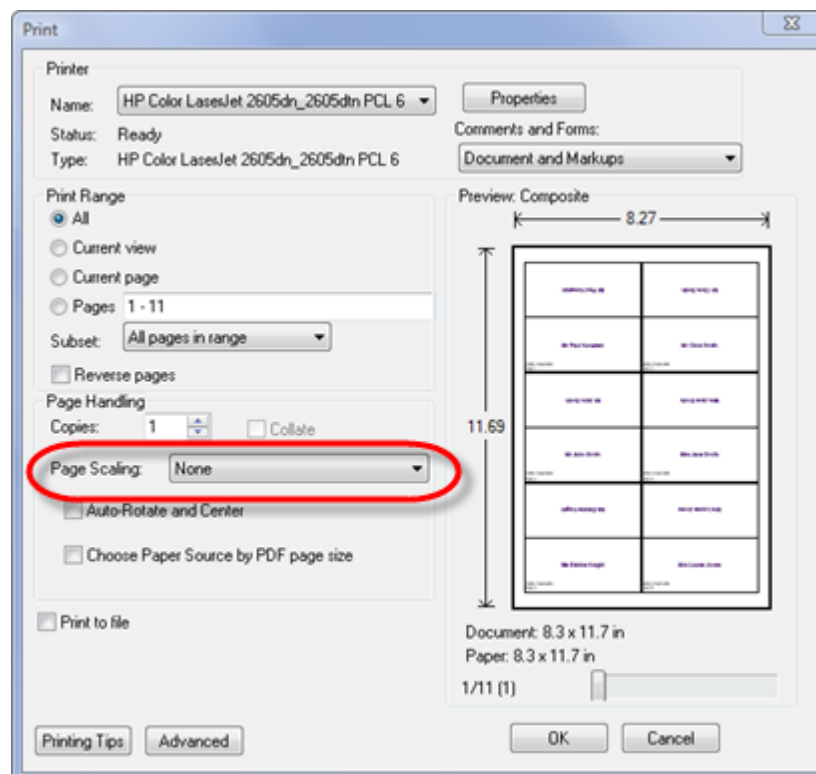
Choose the page size from the **Size** drop-down list.

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.



Note When printing a PDF from Adobe Acrobat, make sure you set **Page scaling** to **None** to print the PDF at the correct size.



See also:

- [Export formats](#)

### 2.1.10.15 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(s)** 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](#)

### 2.1.10.16 Find Plan Files window

Use the **Find Plan Files** window to locate PerfectTablePlan plan files on your computer. To display this window select **File>Find** or (to display backup files) **File>Backups**.

Select from the **Find** drop-down list depending on the type of PerfectTablePlan file you wish to find.

Set the **in** field to select the folder you wish to search. Click the **Browse...** button to browse folders. Check **include sub folders** to search all folders within the selected folder (and all the folders they contain, and so on).

Click **Start** to start the search. Click the button again to stop the search.







The files found are displayed in the list. The **Last modified** time is shown in ISO format (YYYY-MM-DDTHH:MM:SS). Click **Open** (or double click a file in the list) to open the selected plan or backup file and close this window. Check **open read-only** to open the plan as read-only (this can be useful when you have [multiple-users](#) accessing the same plan file). Click **Cancel** to close this window without opening a plan.

Note It may take several minutes to scan your harddisk. So you should only use this window for plans that you can't find using **File>Open** or **File>Open recent**.

See also:

- [Most Recently Accessed window](#)
- [Backup files](#)
- [Create a re-usable template plan](#)


## 2.1.10.17 Fonts and Colours window


The  **Fonts and colours** window allows you to change fonts and colours/gradients/textures 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 which pane is at the front. Use 'themes' to load and save groups of font and colour/gradient/texture choices.





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

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 **Visualization...** to change visualization colours used in the  **Floor Plan**,  **Table Plan** and  **Stationery** panes via the  [Visualization colours window](#).

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 to other plans.

#### 2.1.10.18 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.

## 2.1.10.19 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 **Anon** 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). You can also record middle names or initials, if you wish.

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

**Suffix** can be used for anything that appears after the guest's name, such as a: job title (e.g. 'Director of sales'), role (e.g. 'Master of ceremonies'), qualification (e.g. 'BSc') or post-nominal title (e.g. 'OBE').

**Note** The **Title**, **First name**, **Last name** and **Suffix** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) if you have checked **automatically capitalise guest names** in the **Names** tab of the  **Preferences** window.

**Display name** is the name in the format you want to display it, e.g. Mr John Smith Phd, Master of Ceremonies. PerfectTablePlan sets a default display name from the **Title**, **First name**, **Last name** and **Suffix** (according to the **Default display name format** field in the **Names** tab of the  **Preferences** window), but you can change this at any time. 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 [Σ Report pane](#) will then total each course separately.

**Special req.** is for 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 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](#)
- [Edit a property for multiple guests](#)

- [Names and titles](#)

#### 2.1.10.20 Image Properties window

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 Windows Explorer 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.

See also:

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





#### 2.1.10.21 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 **Insert** tool bar button.

See also:

- [Importing](#)
- [Import Data window](#)
- [Importing guests from Excel files](#)
- [Importing guests from text and CSV files](#)
- [Importing guests from vCards](#)
- [Importing guest details from Facebook](#)
- [Import guest details from Outlook](#)
- [Import guest details from Outlook Express](#)


#### 2.1.10.22 Import Data window

The  **Import Data** window allows you to import data into your plan from other applications, for example [from an Excel, CSV or text file](#). This can save you a lot of typing. To display this window select **File>**  **Import...** or the equivalent **Insert** tool bar button. The  [Import window](#) will be displayed. Select **Excel/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 can only read Excel .xls/.xlsx files if you have Excel installed. Otherwise 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 **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
<b>Gender</b>	Text must start with: <ul style="list-style-type: none"> <li>• 'F' or 'f' for a female</li> <li>• 'M' or 'm' for male</li> </ul> otherwise the guest is imported with unknown gender
<b>Age</b>	Text must start with: <ul style="list-style-type: none"> <li>• 'C' or 'c' for a child</li> </ul> otherwise the guest is imported as an adult
<b>VIP</b>	Text must start with: <ul style="list-style-type: none"> <li>• 'V', 'v', 'Y' or 'y' for a VIP</li> </ul> otherwise the guest is imported as an non-VIP
<b>RSVP</b>	Text must be: <ul style="list-style-type: none"> <li>• 'Arrived' for arrived, case unimportant</li> <li>• 'Opened', 'Unopened', 'Delivered' or 'Unconfirmed' for sent, case unimportant (for integration with paperlesspost.com, pingg.com and zankyou.com)</li> </ul>

- 'Confirmed' for accepted, case unimportant (for integration with zankyou.com)
- 'Not coming' or 'Regrets' for declined, case unimportant (for integration with paperlesspost.com and zankyou.com)

Or else start with:

- 'S' or 's' for sent
- 'A', 'a', 'Y' or 'y' for accepted
- 'C' or 'c' for cancelled
- 'D', 'd', 'N' or 'n' for declined

Otherwise the RSVP status is unset.

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

### [Advanced and Professional editions only](#)

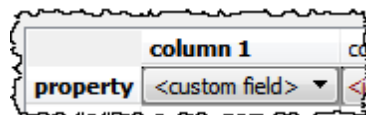
## Importing custom fields

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

<b>Number</b>	Valid whole numbers imported Otherwise set to default
<b>Currency</b>	Valid whole numbers or decimal numbers imported Otherwise set to default
<b>Selection</b>	Allowed selections imported Otherwise set to default
<b>Tags</b>	Text imported

If you want to import into a custom field that you haven't already created, select **<custom field>** from the drop-down list. This will create a new custom field for you. It will also do its best to guess the correct type and to set the allowed values for a custom field of type Selection.



## 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 groups 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

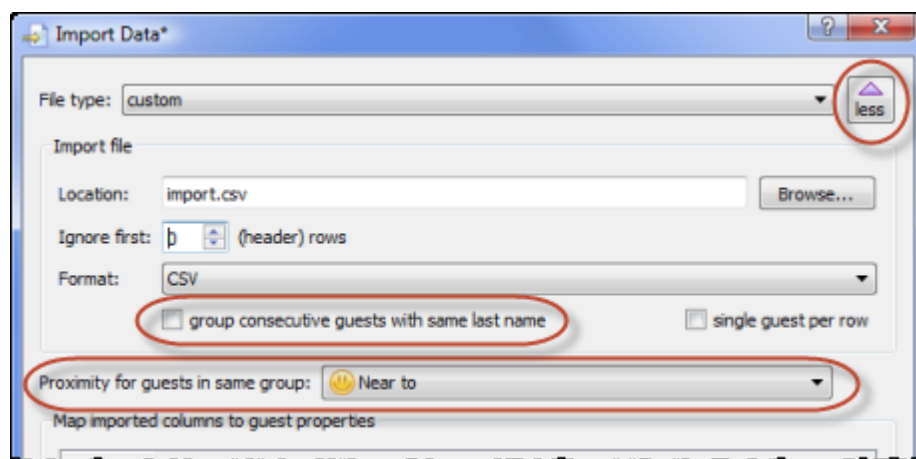
### 3. make this column the **group** field during import

Map imported columns to guest properties

	column 1	column 2	column 3
property	First name(s)	Last name(s)	Group
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

If **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.



The **Num. guests** field is the number of anonymous guests to be added to the names imported. 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" and 2 anonymous guests will be added (all in the same group).

Map imported columns to guest properties


	column 1	column 2
property	Full name(s)	Num. guests
row 1	Mr J Smith	2

The **Num. in group** field is the total number of guests in the group, including



any named guests. It can be from 0 to 999. For example, if the guest is "John Smith" and **Num. in group** field is 4 the guests "John Smith" and 3 anonymous guests will be added (all in the same group). If **Num. in group** is less than the number of named guests, it will be ignored.

Note You can set the **Num. guests** or **Num. in group** column, but not both.

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.

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

For more information see [Import seating data](#).

 [Video with audio \(0:25 minutes\)](#)

## Importing guest proximities

You can specify which guests to sit near to (or away from) during import. Guests can be referred to by name, id or group.

Map imported columns to guest properties

	column 1	column 2	column 3	column 4	column 5	column 6
property	Full name(s) ▾	ID ▾	Group ▾	Next to ▾	Near to ▾	Not next to ▾
row 1	John Smith	00001	Smith	Jane Smith, Bill Brown		
row 2	Jane Smith	00002	Smith		00004	
row 3	Bill Brown	00003	Brown	Jenny Brown		Jones
row 4	Jenny Brown	00004	Brown			
row 5	William Jones	00005	Jones	Claire Jones		
row 6	Claire Jones	00006	Jones			

For more information see [Import proximity data](#).

## 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. **Worksheet** shows the name of the worksheet (tab) selected from the Excel spreadsheet. Click on the **Browse...** button to change the file/worksheet 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 **Excel** format, **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 *Ctrl+Click*.

 [Video with audio \(0:38 minutes\)](#)

## Buttons

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](#)



[Importing guest details from Facebook](#)

[Import guest details from Outlook](#)

[Import guest details from Outlook Express](#)

[Example import formats](#)

#### 2.1.10.23 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, e.g. in Windows XP go to **Control Panel>Regional and language options**. 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 event.

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


#### 2.1.10.24 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 **Anon** if you don't know the name of the guest. The 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 record middle names or initials, if you wish.


**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.

**Suffix** can be used for anything that appears after the guest's name, such as a: job title (e.g. 'Director of sales'), role (e.g. 'Master of ceremonies'), qualification (e.g. 'BSc') or post-nominal title (e.g. 'OBE').


Note The **Title**, **First name**, **Last name** and **Suffix** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) if you have checked **automatically capitalise guest names** in the **Names** tab of the  **Preferences window**.


**Display name** is the name in the format you want to display it, e.g. Mr John

Smith Phd, Master of Ceremonies. PerfectTablePlan sets a default display name from the **Title**, **First name**, **Last name** and **Suffix** (according to the **Default display name format** field in the **Names** tab of the  **Preferences** window), but you can change this at any time. 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 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  [Report pane](#) will then show a total for each course separately.

**Special req.** is for 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 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 members 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 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 **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.

### 2.1.10.25 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 **Anon** 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). You can also record middle names or initials, if you wish.


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

**Suffix** can be used for anything that appears after the guest's name, such as a: job title (e.g. 'Director of sales'), role (e.g. 'Master of ceremonies'), qualification (e.g. 'BSc') or post-nominal title (e.g. 'OBE').


Note The **Title**, **First name**, **Last name** and **Suffix** will be automatically capitalised (e.g. `mr john smith` converted to `Mr John Smith`) if you have checked **automatically capitalise guest names** in the **Names** tab of the  **Preferences** window.




**Display name** is the name in the format you want to display it, e.g. Mr John Smith PhD, Master of Ceremonies. PerfectTablePlan sets a default display name from the **Title**, **First name**, **Last name** and **Suffix** (according to the **Default display name format** field in the **Names** tab of the  **Preferences** window), but you can change this at any time. 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 for 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 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 members 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 members 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.

### 2.1.10.26 Insert Image window

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 Windows Explorer 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](#).

- [Add a graphic/image/clipart to the floor plan](#)
- [Find free clipart](#)

### 2.1.10.27 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 **Anon** 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). You can also record middle names or initials, if you wish.

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


**Suffix** can be used for anything that appears after the guest's name, such as a: job title (e.g. 'Director of sales'), role (e.g. 'Master of ceremonies'), qualification (e.g. 'BSc') or post-nominal title (e.g. 'OBE').

Note The **Title**, **First name**, **Last name** and **Suffix** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) if you have checked **automatically capitalise guest names** in the **Notes** tab of the  **Preferences window**.

**Display name** is the name in the format you want to display it, e.g. Mr John Smith Phd, Master of Ceremonies. PerfectTablePlan sets a default display name from the **Title**, **First name**, **Last name** and **Suffix** (according to the **Default display name format** field in the **Names** tab of the  **Preferences window**), but you can change this at any time. 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 for 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 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 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 members 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.


### 2.1.10.28 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 **Anon** 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). You can also record middle names or initials, if you wish.

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


**Suffix** can be used for anything that appears after the guest's name, such as a: job title (e.g. 'Director of sales'), role (e.g. 'Master of ceremonies'), qualification (e.g. 'BSc') or post-nominal title (e.g. 'OBE').

Note The **Title**, **First name**, **Last name** and **Suffix** will be automatically capitalised (e.g. `mr john smith` converted to `Mr John Smith`) if you have checked **automatically capitalise guest names** in the **Names** tab of the  **Preferences** window.

**Display name** is the name in the format you want to display it, e.g. `Mr John Smith Phd, Master of Ceremonies`. PerfectTablePlan sets a default display name from the **Title**, **First name**, **Last name** and **Suffix** (according to the **Default display name format** field in the **Names** tab of the  **Preferences** window), but you can change this at any time. 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 for 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 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 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 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.

### 2.1.10.29 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, a colour [gradient](#) or [texture](#) 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.

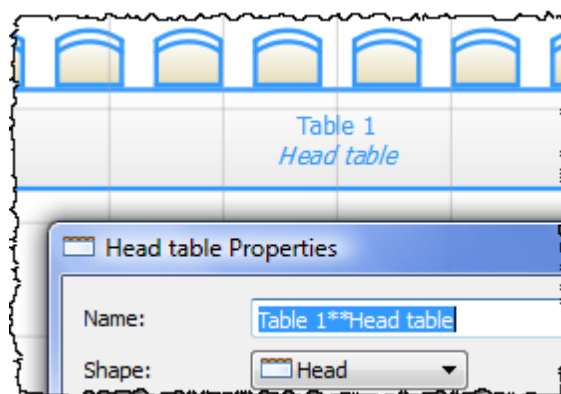
**Note** The new shape will be placed automatically in the [Floor Plan pane](#). It will attempt to place it in a space near the centre of the room. You can then drag it to the appropriate position.

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

### 2.1.10.30 Insert Table window

The **Insert Table** window allows you to create one or more tables. To display this window select **Insert>E-Shaped Table**, **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**, **gradient** or **texture** to choose the colour, [gradient](#) or [texture](#) of the table in the [Floor Plan](#) and [Table Plan](#) panes. This overrides any table colour set for the pane in the [Fonts and colours](#) window. Click **Default** to set the table colour back to the default.

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

Table	Icon	Meaning
-------	------	---------

E-Shaped		a head (top) table + 2 or more sprigs (legs) ( <a href="#">Advanced and Professional editions</a> only)
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](#).

#### Advanced and Professional editions only

You can change the seat numbering:

- If you set **Seat numbers** to **sequential** you can change the number of the first seat and whether the seats are ordered clockwise or anti-clockwise.
- If you set **Seat numbers** to **custom** you can change them to anything you like (including letters or names) in the [Custom seat numbering window](#).

Set the **Guests** drop-down to **Seat number** at the top of the  **Floor Plan** or  **Table Plan** panes to see seat numbers in these panes.

**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.


If you have a circular table bigger than the auto size you can uncheck **space seats evenly** to group all the seats together. This is useful for 'sweetheart' or 'cabaret' style seating.

**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](#).

#### 2.1.10.31 Insert Text window

The  **Insert Text** window allows you to add text to the  [Floor Plan pane](#). This text can be used for titles, headers, footers and captions. To display this window click the  **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](#).

### 2.1.10.32 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.

 [Video with audio \(0:38 minutes\)](#)

See also:

- [Split columns window](#)

### 2.1.10.33 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 not be able to save, export or print plans with more than 30 guests.

If you have a licence key copy and paste it into the **Key** field by clicking the **Paste key** button or using the *Ctrl+V* accelerator. 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 V4 to V5** if you have a version 4 key and wish to upgrade to version 5.

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 **Paste key** to paste from the clipboard into the **Key** field.

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](#)

#### 2.1.10.34 Most Recently Accessed window

The  **Most Recently Accessed** window is a convenient way to open plans that you have 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). You can click on the column headers to sort them. The **Last modified** time is shown in ISO format (<YYYY-MM-DD>T<HH:MM:SS>).

Check **open read-only** to open the plan as read-only. This can be useful when



you have [multiple-users](#) accessing the same plan file.

Select from the **Show** drop-down list to filter plans by how recently they were modified.


To display this window every time you start 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 **Open** button or double click on the plan file. To close the window without opening a plan click the **Cancel** button.

See also:

- [Find Plan Files window](#)
- [Backup files](#)


#### 2.1.10.35 Numbers and Budget window

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

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

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

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

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

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

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

**Estimated guests** is an estimate of the number of guests attending (rounded to the nearest whole number). For example, if you have 10 guests 0% likely to attend, 10 guests 10% likely to attend, 10 guests 95% likely to attend and 5 guests 100% likely to attend the estimated number of guests is 16 (  $10 \times 0\% + 10 \times 10\% + 10 \times 95\% + 5 \times 100\%$ ). Due to rounding the total number of guests may not be the same as estimated adults + estimated children.

**Estimated cost** is derived from the cost data provided and the estimated number of guests.

Obviously the results are only as accurate 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.



#### 2.1.10.36 Page Setup window

Use this window to set the printer paper size, orientation and margins. To display this window select **File>Page Setup....**

See also:

- [Print window](#)
- [Print Setup window](#)

#### 2.1.10.37 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 **Edit> Preferences**.

The Window has 8 tabs:

- [Edition](#)

- [General](#)
- [Auto assign](#)
- [Names](#)
- [Titles](#)
- [Terms](#)
- [Backups](#)
- [Warnings](#)



## Edition

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 **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 300 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 maximum size of image exported is 4096x4096 pixels, regardless of whether this box is checked. Export to PDF format if you want higher resolution.

Check **use native file open/save windows** to use the native Windows file **Open** and **Save** windows. We only recommend unchecking this if you have problems with the native file open/save windows (they caused crashes on Mac OS X 10.8 in a previous release).

Check **allow file locking** to lock open plan files so that only a single user can write to them (any number can read). This is useful when you have [multiple users accessing shared plans](#) across a network.

Set **When read-only plan updated** according to what you want to happen when you have opened a plan as read-only and it is updated by another application (e.g. PerfectTablePlan running on another computer).

- **Do nothing** to ignore updates.
- **Prompt to reload plan** if you want to be prompted whether to reload each time the plan is updated.
- **Reload plan without prompting** if you want to automatically display any changes to the plan you are reading. You will still be prompted if you have modified the plan since you opened it. This option is very useful if you are [reading a plan file from another computer to display seating changes in real time on a VDU chart](#).

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 the 'skin' you prefer.





Standard windows style





Dot Net style



Office style


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 *Ctrl* 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 assign

Select **according to guest proximity** if you want to the auto seating to assign guests according to the proximities set in the  [Proximity pane](#). Select **randomly** to assign guests to seats completely randomly (this may be useful for some types of events).

Select **seconds** if you wish the [automatic assignment](#) to stop after the specified number of seconds. We recommend at least 30 seconds. If you have a lot of guests or a very slow PC you may have to increase this time considerably.

Select **attempts without improvement** if you wish the automatic assignment to stop after a specified number of [attempts \(generations\)](#) 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...).

Select from **On narrow tables prefer near to/next to guests seated** depending on whether you prefer to seat guests opposite or left/right of each other on narrow (e.g. banquet and E-shaped) tables. Seats are considered opposite if they are less than 2 metres (approx 6 feet) apart and there are the same number of seats on each side.

## Names

Check **automatically capitalise guest 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`).

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"

{next_table_letter}	"A", "B", "C"
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} or {next\_row\_letter} to substitute in the number or letter of the next row.





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

Use **Default display name format** to change the default display name for new guests. The guest title, first name, first name initials, last name, last name initials and suffix are substituted into {title}, {first}, {f}, {last}, {l} and {suffix}, respectively. For example:

Default display name format	Default display name for Mr John Smith Phd
{title} {first} {last} {suffix}	Mr John Smith Phd
{last}, {title} {first}	Smith, Mr John
{last}, {title} {f}	Smith, Mr J.
{first} {last}**{suffix}	John Smith**Phd

If you change the **Default display name format** you will be given the option to update display names for existing guests.


Use **Display group members as** to set how group member names are displayed in the follow situations:

- listing by group in the  **Table** chart or  **Guest** chart panes
- substituting into {group\_members} in the  **Stationery** pane
- exporting members (formal) in the  **Export Data** window




## 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.

## Backups

Check **when saved** to create a [backup file](#) each time you save a plan.

Check **on auto assign** to create a backup file each time you run an auto assignment.

Check **on export** to create a backup file each time you export.

Check **on print** to create a backup file each time you print.

Check **automatically every** to create a backup file at the specified time interval. The plan will only be backed-up if it has been changed during this time.

Check **at startup check for unsaved changes in backup files** if you wish to check whether backup files may contain unsaved changes at startup.









## Warnings

You can turn various warnings on and off here.

## Buttons

Click **OK** to accept the changes. Click **Cancel** to discard the changes. Changes to this window affect all plans.

### 2.1.10.38 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

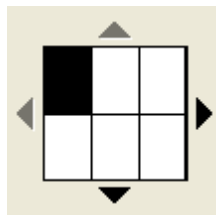
window will depend on the type of pane being printed.

Change the **Size** field 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:

- [Page Setup window](#)
- [Print legible plans on a small format printer](#)
- [Print to poster size](#)
- [Export to PDF format](#)

### 2.1.10.39 Print Setup window

The **Print Setup** window allows you to change printer settings. To display the **Print Setup** window click the **Setup...** button in the  [Print window](#).

Click on the appropriate printer icon in **Select Printer**.

**Check Print to file** if you wish to print to a file, instead of a printer.

Click on the **Preferences** button to change printer preferences, for example to change from portrait to landscape. A **Printer Preferences** window will appear. The **Printer Preferences** window will vary with the type of printer.



Set **Number of copies** to the number of copies you want to print.


Click on the **Print** button to confirm the change to printer settings or **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:

- [Print window](#)
- [Page Setup window](#)
- [Export to PDF format](#)

### 2.1.10.40 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.


See also:



- [Importing](#)


#### 2.1.10.41 Renumber/rename tables window

##### [Professional edition only](#)

The  **Renumber/rename table** window allows you to quickly rename lots of tables. To display this window click on the  button in the  **Floor Plan** pane.



While the  **Renumber/rename table** window is displayed you can rename tables by just clicking on them. The table will be renamed to the text in **Table name format** with **Next table number** substituted for {next\_table\_num} and the alphabetic equivalent of **Next table number** substituted for {next\_table\_letter}. E.g. if **Table name format** is Table #{next\_table\_num} and **Next table number** is 10 clicking on a table will rename it to Table #10. **Next table number** is incremented by 1 for each click.

Selecting **Edit**> **Undo** will undo all the renumbering since the  **Renumber/rename table** window was first displayed.

When the window is first opened **Next table number** is set to 1 and **Table name format** is set to the value of **New table name format** in the **Names** tab of the  **Preferences** window. You can reset these values by clicking the corresponding **Reset** buttons.

 [Video with audio \(0:44 minutes\)](#)

#### 2.1.10.42 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.

#### 2.1.10.43 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.

#### 2.1.10.44 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 remove the group(s) currently selected in the right list from your selection.



Click **<<Remove all** to remove all groups(s) from 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.

#### 2.1.10.45 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 remove the guest(s) currently selected in the right list from your selection.

Click **<<Remove all** to remove all guest(s) from 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.

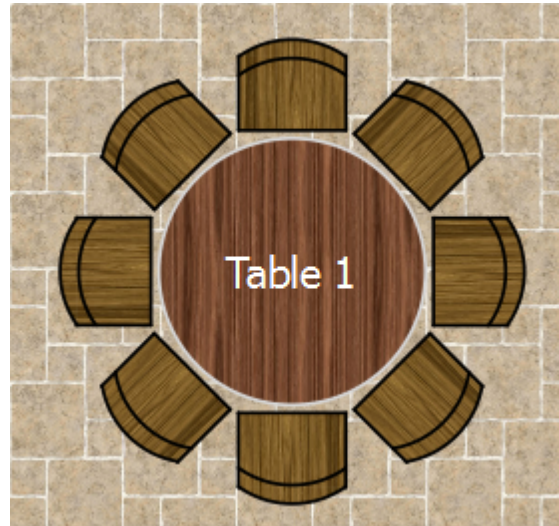
Click **OK** to accept the changes and close the window.

Click **Cancel** to discard the changes.







#### 2.1.10.46 Select Texture window

The  **Select Texture** window allows you to use textures for tables, chairs,

shapes and the background (floor) in the  [Floor Plan](#) and  [Table Plan](#) panes. Textures can be used to create a more realistic representation of features such as wooden or tiled floors.



To display this window either:

- Click on the  **Fonts and colours** window with the  **Floor Plan** or  **Table Plan** pane at the front. Then select **texture** from the **Table**, **Seat** or **Drawing area** drop-down lists.
- Double click on a table in the  **Floor Plan** and  **Table Plan** pane and select **texture** from the **Inside** drop-down list.
- Double click on a shape in the  **Floor Plan** pane and select **texture** from the **Inside** drop-down list.

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

If you have already added images to this plan you can select them from the **Select texture** 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 texture image in pixels (the preview may be displayed



smaller in this window).

Set the **Repeat every** fields to how often you want the texture to repeat, e.g. every 2.00 metres. Note that the texture preview will not change.

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

**Mirror alternate tiles** can be useful if you have a non-seamless texture, e.g. where the top of the texture does not matchless seamlessly with the bottom of the texture.




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

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

See also:

- [Find free textures](#)

#### 2.1.10.47 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 colour, [gradient](#) or [texture](#) 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.

#### 2.1.10.48 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 column(s) being split. The new columns are selected. The original column(s) is/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.

 [Video with audio \(0:38 minutes\)](#)

See also:

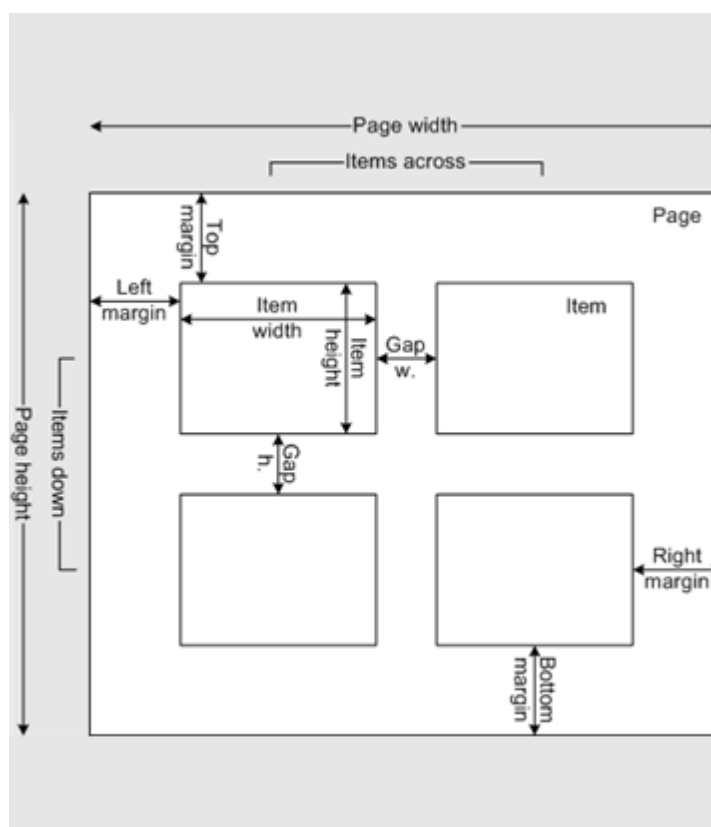
- [Join Columns window](#)

#### 2.1.10.49 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 **Search** 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** to accept the changes and close the window. Click **Cancel** to discard any changes and close the window.


See also:


- [Print stationery on blank sheets](#)
- [Print stationery on press-out sheets](#)

#### 2.1.10.50 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.

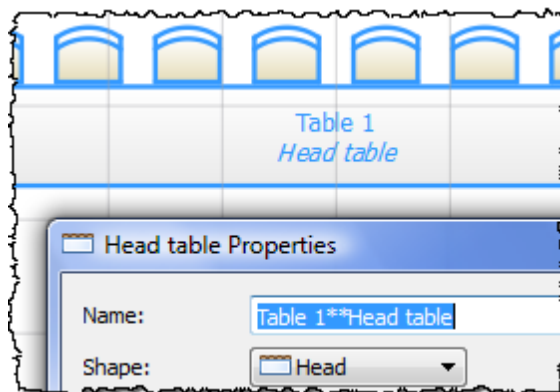
Click on the  **Sort** button to order tables. The sort is basically alphabetic, but is intelligent enough to order "table 10" after "table 2". The sort is not case sensitive.



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.




#### 2.1.10.51 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**, **gradient** or **texture** to choose the colour, [gradient](#) or [texture](#) of the table in the  **Floor Plan** and  **Table Plan** panes. This overrides any table colour set for the pane in the  [Fonts and colours](#) window. 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
E-shaped		a head (top) table + 2 or more sprigs (legs) ( <a href="#">Advanced and Professional editions</a> only)
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

<b>Semi-circular</b>		a semi-circular table with seats around the straight side and/or curved sides
<b>Oval</b>		an elliptical table with seats all around it
<b>Row of seats</b>		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](#).

### Advanced and Professional editions only

You can change the seat numbering:

- If you set **Seat numbers** to **sequential** you can change the number of the first seat and whether the seats are ordered clockwise or anti-clockwise.
- If you set **Seat numbers** to **custom** you can change them to anything you like (including letters or names) in the [Custom seat numbering window](#).

For E-shaped tables you can check the **by section** check box to number each table section separately, start from 1.

Set the **Guests** drop-down to **Seat number** at the top of the  **Floor Plan** or  **Table Plan** panes to see seat numbers in these panes.

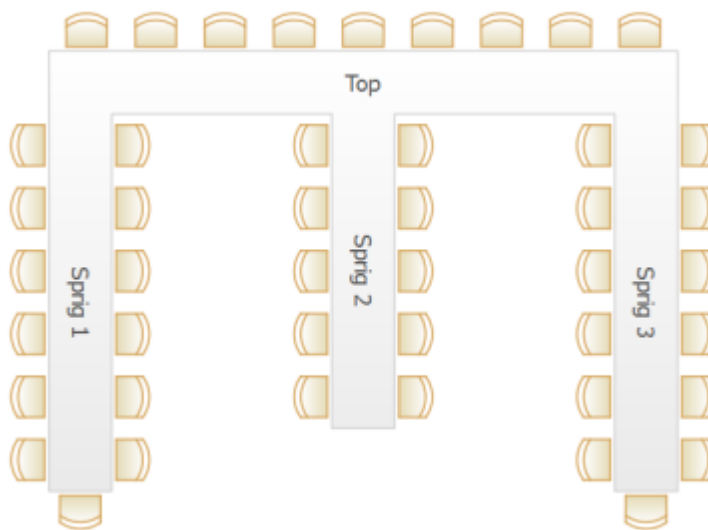
**Size** is the size of the table. Check the **auto** check box to automatically size the table according to the number of seats and the seat size (as set in the [Dimensions window](#)). Uncheck the **auto** check box to set your own table size.

**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.

If you have a circular table bigger than the auto size you can uncheck **space seats evenly** to group all the seats together. This is useful for 'sweetheart' or 'cabaret' style seating.

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

[Advanced and Professional editions only](#)





An E-shaped table is a single table composed of a horizontal section (the top or head) plus between 2 and 9 vertical sections (the sprigs or legs). Each section has its own size, number of seats, name and VIP status. Click on the **Sections...** button to configure the sections in the [Table Section Properties window](#).

**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.

### 2.1.10.52 Table Section Properties Window

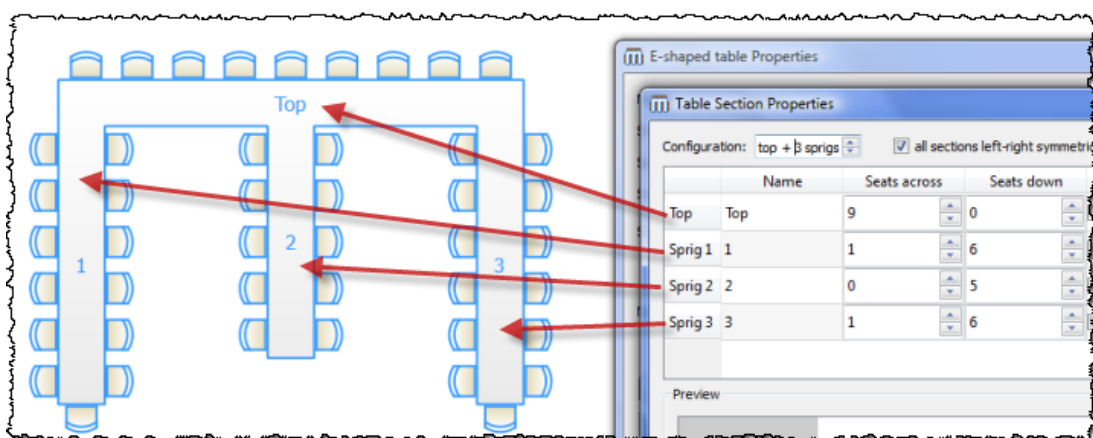
#### Advanced and Professional editions only

The **Table Section Properties** window allows you to configure the sections of an E-shaped table. To display this window click the **Sections...** button on the [Table Properties window](#) for an E-shaped table.

An E-shaped table has 1 horizontal ('top' or 'head') section and between 2 and 25 vertical ('sprig' or 'leg') sections. Use the **Configuration** field to set the number of sprigs.

Uncheck the **all sections left-right symmetrical** box if you want to put different numbers of seats on the left and right side of any section.

**Units** are the units set in the **Table Properties** window.



The first section listed is always the top section. The remaining sections are the sprigs, from left to right. Each section has the following properties:

- **Name:** The section name. Can be left blank.
- **Seats across:** The number of seats horizontally. For the top section the seats are at the top, for the sprig sections the seats are at the bottom.
- **Seats down (all sections left-right symmetrical checked):** The number of seats vertically on each side.
- **Seats down left (all sections left-right symmetrical unchecked):** The number of seats vertically on the left side.
- **Seats down right (all sections left-right symmetrical unchecked):** The number of seats vertically on the right side.
- **Auto size:** Check to set the size of the section automatically.
- **Size across:** The size of the section horizontally in **Units**. Uncheck **Auto size** to set this manually.
- **Size down:** The size of the section vertically in **Units**. Uncheck **Auto size** to set this manually.
- **VIP:** Check if you want the automatic seat assignment to seat VIP guests preferentially in this section.

Click  **Add** to add a new section.

Click  **Delete** to delete the selected section.

Click  **Up** to move the selected section up one row.



Click  **Down** to move the selected section down one row.

**Preview** shows what the table will look like.

**Total size** is the size of the bounding rectangle containing the table (but not the chairs) in **Units**.

**Total seats** is the total number of seats for the table.

### 2.1.10.53 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.


### 2.1.10.54 Visualization Colours window

When you use colours to visualize gender, meal, group and custom fields in the  **Floor Plan** and  **Table Plan** panes, PerfectTablePlan selects the colours automatically using 12 default colours. The  **Visualization colours** window allows you to change these colours. E.g. you can change the colour used to display a vegetarian meal to green.

To display this window in the  **Floor Plan** or  **Table Plan** pane:

1. Click the  button at the top of the pane.
2. Click the **Visualization...** button in the  [Fonts and Colours window](#).

To display this window in the  **Stationery** pane:

3. Click on a colour code spot in the  **Design** tab.
4. Click the **Colours...** button that appears at the bottom of the pane.

Set **Field** to the name of the field whose colours you wish to change.

Set **Colours per value** depending on the number of colours you wish to use to represent a value. 2 colour schemes can be useful if you are trying to distinguish between lots of different values. E.g. if you have 100 groups, it is hard to choose 100 visually distinct colours. 2 colour schemes are only available for **Groups** and custom fields of type Selection.

Click on a colour button to edit the colour.

Click **Set colours automatically** to automatically set the colours. This is particularly useful if you change from a 1 colour scheme to a 2 colour scheme.


















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.

Note Changes to the colours only affect the current plan. If you wish to use these colours in other plans you will need to [create a re-usable template plan](#).

 [Video with audio \(1:20 minutes\)](#)

### 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	 <b>Guests</b> pane,  <b>Groups</b> pane,  <b>Schematic</b> pane,  <b>Floor</b> <b>Plan</b> pane or  <b>Table</b> <b>Plan</b> pane	seat, table or background in  <b>Floor Plan</b> pane,  <b>Table</b> <b>Plan</b> pane or  <b>Schematic</b> pane	guest(s) (re) assigned/ unassigned
 guest(s)	<i>Shift</i>	 <b>Guests</b> pane,  <b>Groups</b> pane,  <b>Schematic</b> pane,  <b>Floor</b>	seat, table or background in  <b>Floor Plan</b> pane,  <b>Table</b>	all members of group(s) (re)assigned/ unassigned










































		Plan pane or  Table Plan pane	Plan pane or  Schematic pane	
 group(s) or  guest(s)	none	 Groups pane	 Groups pane	group membership changed
background	none	 Floor Plan pane or  Table Plan pane	different position	scrolls
 table	none	 Floor Plan pane	 Floor Plan pane	table moved
 table	none	 Schematic pane	 Schematic pane	table order changed
 plan (.tp) file	none	operating system	 Guests pane,  Groups pane,  Schematic pane,  Floor Plan pane,  Table Plan pane,  Table Chart pane,  Guest Chart pane or  Report pane	open plan
 vCard (.vcf) file	none	operating system	 Guests pane,  Groups pane,  Schematic pane,  Floor Plan pane,  Table Plan pane,  Table	import vCard

			Chart pane,  Guest Chart pane or  Report pane	
 Excel/CSV/ text file	none	operating system	 Guests pane,  Groups pane,  Schematic pane,  Floor Plan pane,  Table Plan pane,  Table Chart pane,  Guest Chart pane or  Report 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 Windows version of PerfectTablePlan:

Key	Accelerator	Action
1	<i>Ctrl+1</i>	Add guests task (Basic interface)
	<i>Alt+1</i>	Hide/Show Left pane (Expert interface)

2	<i>Ctrl+2</i>	Proximity task (Basic interface)
	<i>Alt+2</i>	Hide/Show Top pane (Expert interface)
3	<i>Ctrl+3</i>	Add tables task (Basic interface)
	<i>Alt+2</i>	Hide/Show Bottom pane (Expert interface)
4	<i>Ctrl+4</i>	Assign seats task (Basic interface)
5	<i>Ctrl+5</i>	Print task (Basic interface)
A	<i>Ctrl+A</i>	Select all (but not hidden items)
B	<i>Ctrl+B</i>	Numbers and Budget
C	<i>Ctrl+C</i>	Copy
	<i>Alt+C</i>	Collapse all in <b>Groups</b> pane or <b>Schematic</b> pane
D	<i>Ctrl+D</i>	Show selected in <b>Floor Plan</b> pane
	<i>Ctrl+Alt+D</i>	Show selected in <b>Table Plan</b> pane
	<i>Ctrl+Alt+Shift+D</i>	Show selected in <b>Schematic plan</b> pane
	<i>Ctrl+Shift+D</i>	Show selected in <b>Guests plan</b> pane
	<i>Alt+Shift+D</i>	Show selected in <b>Groups plan</b> pane
E	<i>Ctrl+E</i>	Export
F	<i>Ctrl+F</i>	Find in <b>Guests</b> , <b>Groups</b> , <b>Floor plan</b> , <b>Schematic</b> or <b>Proximity</b> pane

G	<i>Ctrl+G</i>	Insert single guest
	<i>Ctrl+Alt+G</i>	Insert guest couple
	<i>Ctrl+Shift+G</i>	Insert guest family
	<i>Ctrl+Alt+Shift+G</i>	Insert guest group
I	<i>Ctrl+I</i>	Import
	<i>Ctrl+Shift+I</i>	Information
J	<i>Ctrl+J</i>	Quick insert guests
K	<i>Ctrl+K</i>	Lock selected guests
	<i>Shift+Ctrl+K</i>	Unlock selected guests
L	<i>Ctrl+L</i>	Auto Assign Seats
M	<i>Ctrl+M</i>	Insert custom table
N	<i>Ctrl+N</i>	New plan
O	<i>Ctrl+O</i>	Open plan
	<i>Ctrl+Shift+O</i>	Open Recent
P	<i>Ctrl+P</i>	Print
R	<i>Ctrl+R</i>	Insert rectangular table
	<i>Ctrl+Alt+R</i>	Insert banquet table
	<i>Ctrl+Shift+R</i>	Insert head table



S	<i>Ctrl+S</i>	Save plan
	<i>Ctrl+Shift+S</i>	Save plan as
T	<i>Ctrl+T</i>	Insert circular table
	<i>Ctrl+Alt+T</i>	Insert semi-circular table
	<i>Ctrl+Shift+T</i>	Insert oval table
	<i>Ctrl+Alt+Shift+T</i>	Insert row of seats
U	<i>Ctrl+U</i>	Unassign guest
V	<i>Ctrl+V</i>	Paste
W	<i>Ctrl+W</i>	Close window
X	<i>Ctrl+X</i>	Cut
	<i>Alt+X</i>	Expand all in <b>Groups</b> pane or <b>Schematic</b> pane
Y	<i>Ctrl+Y</i>	Redo
Z	<i>Ctrl+Z</i>	Undo
F1	<i>F1</i>	Context sensitive help
	<i>Shift+F1</i>	What's this help
F4	<i>Ctrl+F4</i>	Close window
	<i>Alt+F4</i>	Close window
F5	<i>F5</i>	Refresh

F12	<i>Ctrl+F12</i>	Credits
Alt	<i>Alt</i>	Move focus to menu bar
Plus/Minus	<i>Ctrl++/Ctrl+-</i>	Zoom in/zoom out
Asterisk	<i>Ctrl+*</i>	RSVP declined
Backspace	<i>Backspace</i>	Delete
Bracket	<i>Ctrl+[ / Ctrl+]</i>	Previous/next table, guest, group in the <b>Floor Plan</b> pane, <b>Table Plan</b> pane, <b>Proximity</b> pane, <b>Table Properties</b> window, <b>Guest Properties</b> window or <b>Group Properties</b> window
Comma	<i>Ctrl+,</i>	Preferences
Del	<i>Del</i>	Delete
Escape	<i>Escape</i>	Close window
Home/End	<i>Home/End</i>	Start/end of line
Left/Right	<i>Alt+Left arrow / Alt+Right arrow</i>	Select next/previous table in <b>Floor Plan</b> or <b>Table Plan</b> pane
Menu	<i>Menu</i>	Show context menu
Period (Full stop)	<i>Ctrl+.</i>	Globally add/remove "." from titles e.g. "Mr" <-> "Mr."
Slash	<i>Ctrl+ /</i>	RSVP accepted
Space	<i>Alt+Space</i>	Window menu
	<i>Space</i>	Toggle current checkbox/press current

		button
Tab	<i>Tab/Shift-Tab</i>	Next/previous field
	<i>Ctrl+Tab/Ctrl+Shift+Tab</i>	Next/previous tab
Up/Down	<i>Alt+Up arrow/ Alt+Down arrow</i>	Select next/previous seat in <b>Floor Plan</b> or <b>Table Plan</b> pane

You can also use keyboard menu accelerators. For example you can access **File>Open** without using the mouse by typing *Alt+F+O*.

## 2.2 Importing

### 2.2.1 Importing

If you already have guest details (for example in an email or organizer address book, spreadsheet or text file) you can import the data directly into PerfectTablePlan, rather than re-typing it.

PerfectTablePlan can import information in 4 major formats:

- **Excel™ .xls/.xlsx** - Excel's proprietary format.
- **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 the Apple Mac 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 non-English characters](#)
- [Import guests tutorial](#)
- [Example import formats](#)

### 2.2.2 Importing guests from Excel files

PerfectTablePlan can import guest and group information directly from Excel™ .xls/.xlsx files on Windows.

To import an Excel file either:

- drag the file onto the  [Guests pane](#) or  [Groups pane](#); or
- select **File** >  **Import**, choose **Excel/CSV/text file**, click **OK** and select a .xls/.xlsx file to import

The **Import Data** window will appear. For more information see  [Import Data window](#) and the [Import guests tutorial](#).

See also:




- [Example import formats](#)
- [Import guests in couples/families/groups](#)
- [Import proximity data](#)
- [Import seating data](#)
- [Importing guests from text and CSV files](#)
- [Import guest details from Outlook](#)


- [Import guest details from Outlook Express](#)
- [Quick Add Guests window](#)

### 2.2.3 Importing guests from text and CSV files

Many types of applications 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 **Excel/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:



- [Example import formats](#)
- [Import non-English characters](#)
- [Import guests in couples/families/groups](#)
- [Import proximity data](#)
- [Import seating data](#)
- [Importing guests from Excel files](#)
- [Import guest details from Outlook](#)
- [Import guest details from Outlook Express](#)
- [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 applications can export contact information in vCard format, including personal organizers and email packages such as Outlook and OutlookExpress.


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 applications 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](#)

### 2.2.5 Example import formats


Spreadsheets and CSV files can be supplied with guest data organized into columns in a multitude of different ways. Below we give examples of some of the more common formats and how to deal with them.

## A single guest name per row in a single column

	column 1
property	Full name(s)
row 1	Mr John Smith



Group name	Display name	Title	First name	Last name
Smith	Mr John Smith	Mr	John	Smith

If you have commas, the word "and" or other things that might be interpreted as there being more than one name in a column, then you should click on the  button and check **single guest per row**.


If you want to import multiple guests per group you should [add a group column](#).

## A single guest name per row in multiple columns

	column 1	column 2	column 3
property	Title(s)	First name(s)	Last name(s)
row 1	Mr	John	Smith



Group name	Display name	Title	First name	Last name
Smith	Mr John Smith	Mr	John	Smith

If you have commas, the word "and" or other things that might be interpreted as there being more than one name in a column, then you should click on the  button and check **single guest per row**.

If you want to import multiple guests per group you should [add a group column](#).

## Multiple guest names per row in a single column

	column 1
property	Full name(s)
row 1	Mr John Smith & Mrs Jane Smith



Group name	Display name	Title	First name	Last name
Smith	Mr John Smith	Mr	John	Smith
	Mrs Jane Smith	Mrs	Jane	Smith

Various naming formats are handled, including:

Mr & Mrs John Smith  
 John Smith, Jane Smith  
 John and Jane Smith  
 Mr John Smith + 1

The guests will all be placed into a single group.


## Multiple guest names per row in multiple columns

	column 1	column 2	column 3
property	Title(s)	First name(s)	Last name(s)
row 1	Mr & Mrs	John & Jane	Smith



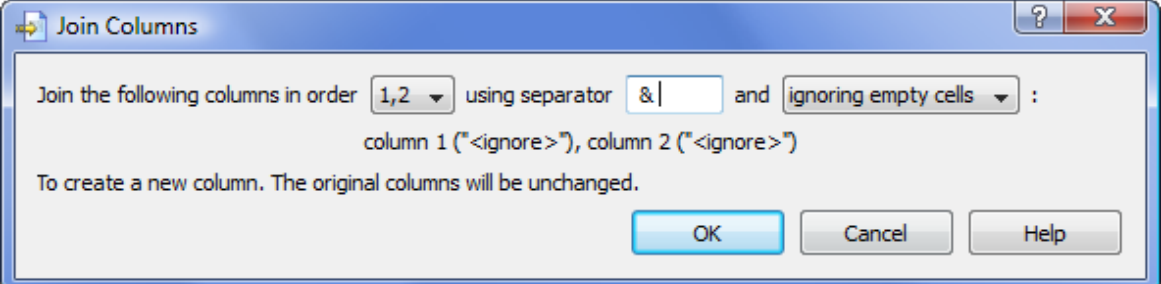
Group name	Display name	Title	First name	Last name
Smith	Mr John Smith	Mr	John	Smith
	Mrs Jane Smith	Mrs	Jane	Smith

The guests will all be placed into a single group.

If you have multiple names in multiple separate columns you can click on the  button and use the [Join](#) feature to convert them to multiple guest names per row in a single column.

	column 1	column 2
property	<ignore>	<ignore>
row 1	Mr John Smith	Mrs Jane Smith





Join the following columns in order **1,2** using separator **&|** and **ignoring empty cells** :

column 1 ("<ignore>"), column 2 ("<ignore>")

To create a new column. The original columns will be unchanged.



	column 1	column 2	column 3
property	<ignore>	<ignore>	Full name(s)
row 1	Mr John Smith	Mrs Jane Smith	Mr John Smith & Mrs Jane Smith



They can then be handled as multiple guest names per row in a single column.

## Column for number of additional guests

	column 1	column 2
property	Full name(s) ▾	Num. guests ▾
row 1	Mr John Smith	1



Group name	Display name	Title	First name	Last name
Guest of Smith	Mr John Smith	Mr	John	Smith

The guests will all be placed into a single group.

## Column for number of total guests

	column 1	column 2
property	Full name(s) ▾	Num. in group ▾
row 1	Mr John Smith	2



Group name	Display name	Title	First name	Last name
Guest of Smith	Mr John Smith	Mr	John	Smith

The guests will all be placed into a single group.


If you get really stuck on this, [contact support](#).

See also:

- [Import non-English characters](#)

## 2.3 Names and titles

### 2.3.1 Names and titles

**Title** is the part of the guest's title (e.g. Mr) or rank (e.g. Captain) that comes before their name. 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 record middle names or initials, if you wish.


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

**Suffix** can be used for anything that appears after the guest's name, such as a: job title (e.g. 'Director of sales'), role (e.g. 'Master of ceremonies'),

qualification (e.g. 'BSc') or post-nominal title (e.g. 'OBE').


If you don't know the name of your guest you can check the **Anon** check box. If you find out their name later just uncheck the box.

**Note** The **Title**, **First name**, **Last name** and **Suffix** will be automatically capitalised (e.g. mr john smith converted to Mr John Smith) if you have checked **automatically capitalise guest names** in the **Names** tab of the  **Preferences** window.

**Display name** is the name in the format you want to display it, e.g. Mr John Smith Phd, Master of Ceremonies. PerfectTablePlan sets a default display name from the **Title**, **First name**, **Last name** and **Suffix** (according to the **Default display name format** field in the **Names** tab of the  **Preferences** window), 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](#).

See also:

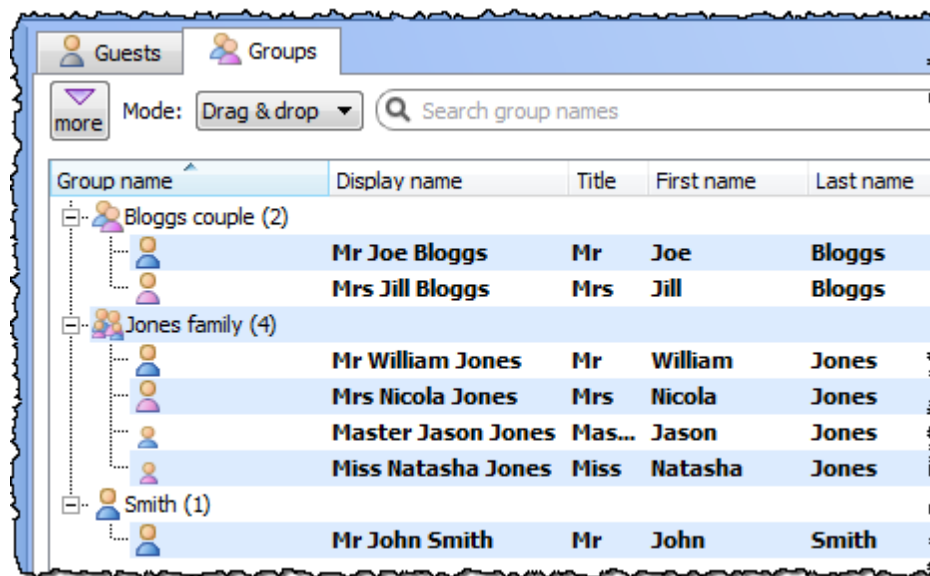
- [Adding and removing dots at the end of titles](#)
- [Customize standard guest titles](#)

- [Handle post-nominal titles](#)
- [Turn on/off guest name capitalisation](#)

## 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 any 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 seated by clicking on the  **Groups** button in the  **Floor Plan** pane.



Different groups are shown in different colour combinations. You can change the colours used in the  [Visualization colours window](#).



See also:




- [Import guests in couples/families/groups](#)
- [Move guests from one group to another](#)
- [Organize guests by company/organization](#)

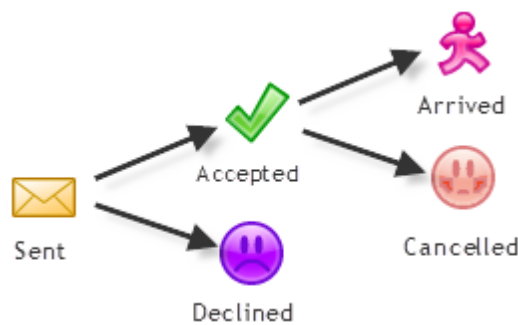
## 2.5 RSVP status

### 2.5.1 RSVP status



RSVP stands for "Répondez s'il vous plaît", French for "Respond please". PerfectTablePlan allows you to track the RSVP status for each guest.


RSVP status		Description
	Unset	No RSVP status has been set.
	Sent	An invitation has been sent and 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.
	Arrived	The guest has arrived at the event.





RSVP workflow

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>Guest Property>RSVP**.

Whether you can assign a guest to a seat depends on their RSVP status and the settings in the  [Preferences window](#).

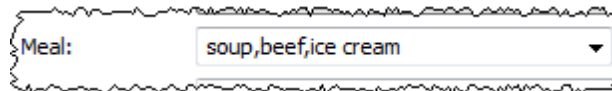
You can show the RSVP status of guests in most panes, for example by clicking on the  button at the top of the  **Floor Plan** pane.

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.



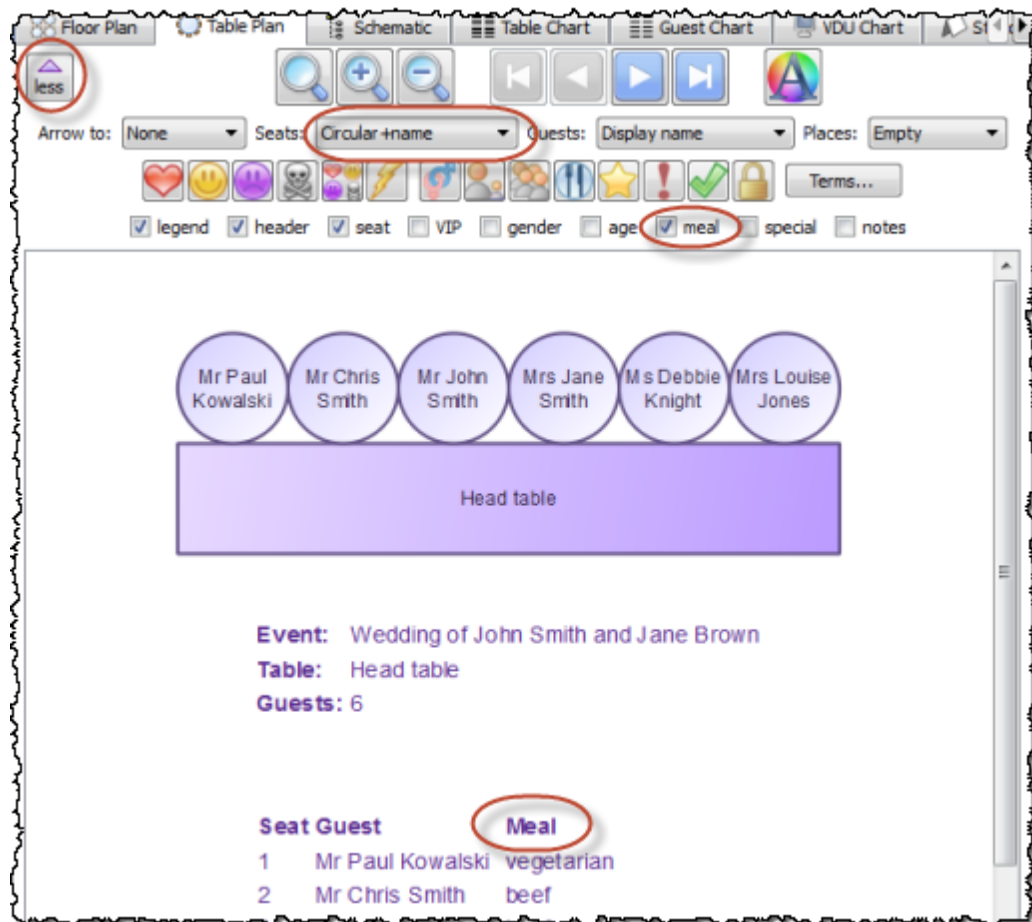
If guests have allergies or other special dietary requirements you can record this in the **Special requirements** field.

Meal selection can be displayed in the [Floor Plan](#), [Table Plan](#), [Table Chart](#), [Guest Chart](#), [Stationery](#) and [Report](#) panes.

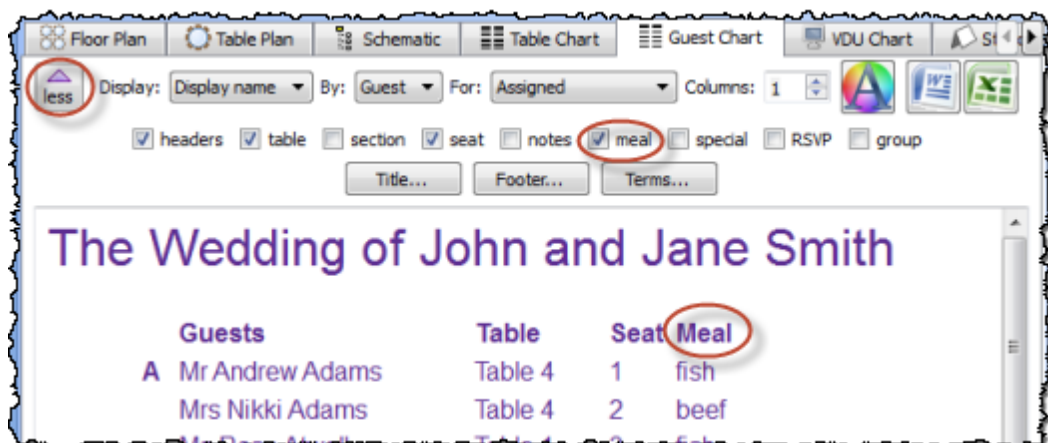


Displaying meal selection in the Floor Plan pane (you can also select Meal from the Guests drop-down list)

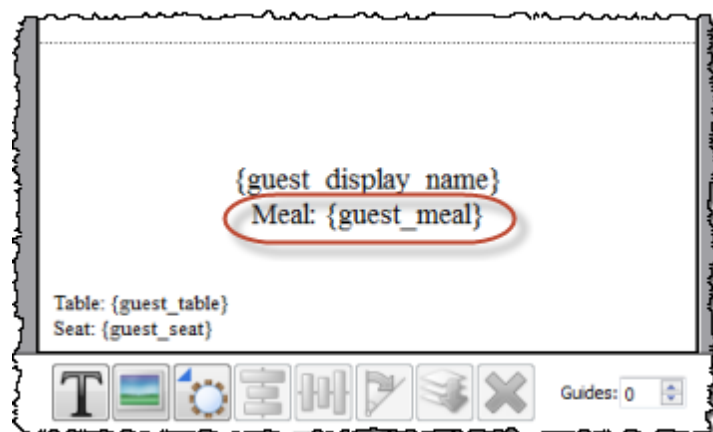
You can change the colours used in the [Visualization colours window](#).



Displaying meal selection 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

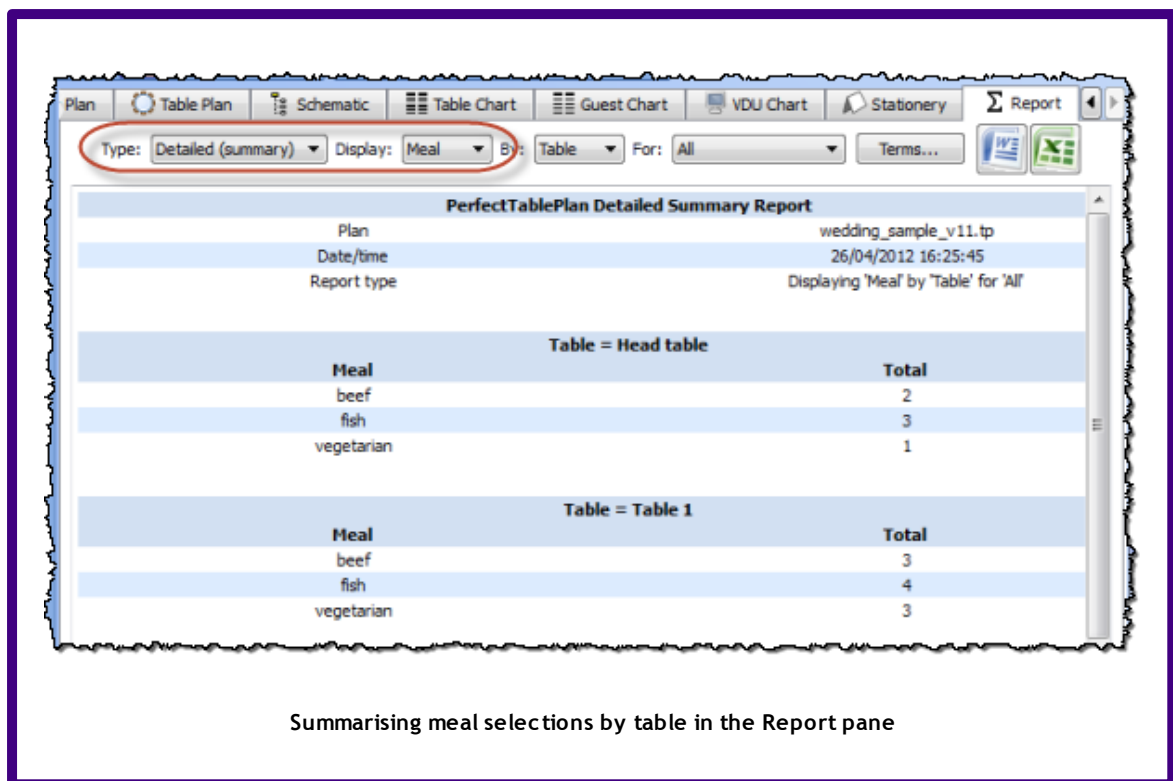
Meal	Accepted	Assigned
None	0	0
beef	18	18
child	13	13
fish	19	19
vegetarian	14	14

Summarising meal selections in the Report pane

### Professional edition only

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





## 2.7 Custom fields

### 2.7.1 Custom fields

#### Advanced and Professional editions only

PerfectTablePlan comes with a number of standard fields: First name, Last name, RSVP, meal choice etc. You can also add custom field appropriate to your type of event. 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.

There are 6 types of custom field:

Field type	Allowed values	Example usage
Yes/No	Yes or No.	Is table sponsor
Text	Any text.	Job title

<b>Number</b>	Any whole number (integer).	Bottles of wine ordered
<b>Currency</b>	Any floating point number. Accurate to two decimal places.	Amount owing
<b>Selection</b>	One of a comma separated list of items.	Employer
<b>Tags</b>	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".

Select **Edit>Custom fields...** to change the custom fields in the **XCustom fields window**.

Custom fields affect PerfectTablePlan in the following ways:

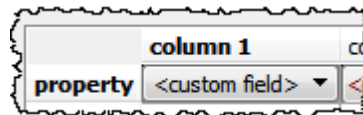
## Guests pane and Groups pane

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

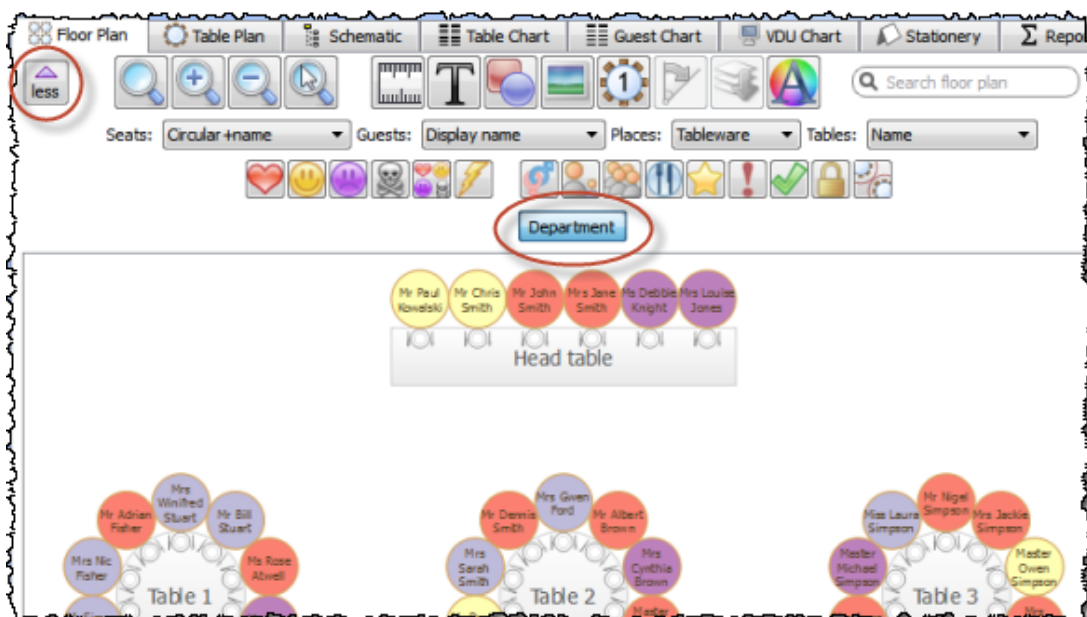
Values can be imported into custom fields. Any £, \$ or € characters will be

stripped from currency values during importing. You can create custom fields during import by selecting **<custom field>** from the drop-down menu at the top of an import column.



## 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. For Selection types you can use combinations of 2 colours. You can change the colours used in the [Visualization colours window](#).




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.

[Professional edition only](#)

## Automatic seat assignment

You can set proximities for fields of type Yes/No and Selection. For example, you could create a custom field 'department' with allowed values: 'sales', 'marketing', 'engineering' and 'admin'. You could then set the proximity in the appropriate [Custom field proximity pane](#) so that guests from the same department are seated together (or apart) by the automatic seat assignment.

## Export window


Custom fields values can be exported.

## 2.8 Seat assignment

### 2.8.1 Seat assignment


Guests can be assigned to seats by:




- [automatic seat assignment](#); and/or
- [dragging and dropping](#) guests or groups onto seats

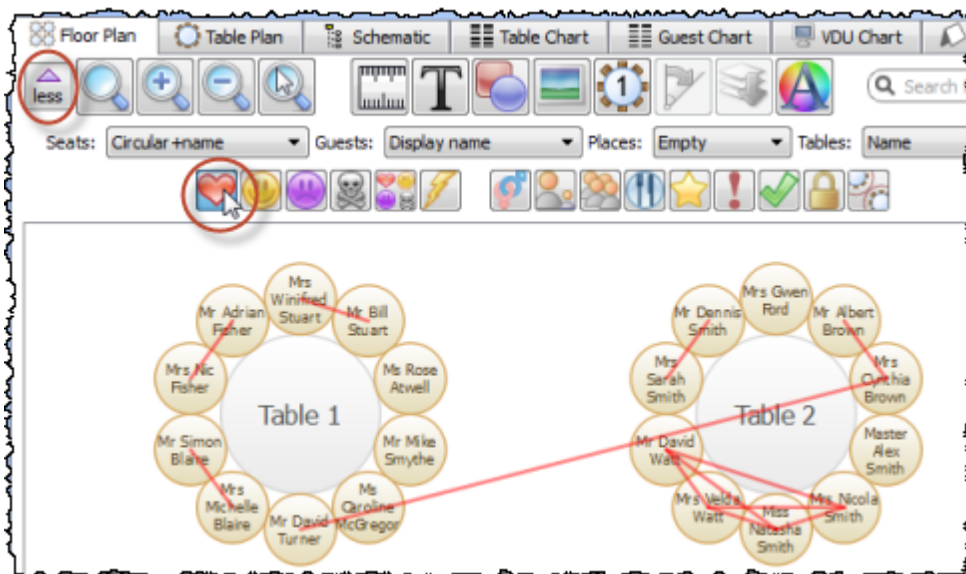
The automatic seat assignment takes account of any [proximities](#) you have set to create a harmonious seating plan (unless you have set it to random in the  **Preferences** window). To get the best results it is usually advisable to use the automatic seat assignment and then fine-tune with drag and 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.

## Checking seat assignments


You can check how good your seat assignments are using the proximity buttons in the  **Floor plan** pane. For example:


- Hold down the  button to show all guests that should be sitting next to each other.
- Hold down the  and  buttons to show potential and critical seating issues, e.g. guests that should be sitting next to each other that aren't.



You can also see non-optimally seated guests in the **Troubleshooting report** in the  [Report pane](#).

## 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>Guest Property>Locked>**  **Yes**

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 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.




See also:

- [Assign \(or reassign\) seats in real time](#)
- [Check who a guest was seated next to at previous events](#)
- [Arrange multiple seatings for an event](#)
- [Assign \(or reassign\) seats in real time](#)



### 2.8.2 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**)
- seat guests opposite each other on narrow (e.g. banquet and E-shaped) tables (unless you have chosen to place them left/right of each other in the  **Preferences window**)
- assign VIP guests to VIP tables
- prioritise VIP guests

It does this by assigning a score to each plan and using a [genetic algorithm](#) to try to find the highest scoring plan. The higher the score, the better the seating fulfils the proximities you have defined.

You can run **File>**  **Auto Assign Seats** as often as you like. Each new run will attempt to improve on the previous one. 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.

#### [Professional edition only](#)

You can also set proximity [using custom fields](#). For example, you can set all guests (not) to sit next to other people in the same company.

You can check you have enough seats by looking at the [Status bar](#).

**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.

## Scoring

A plan is scored as follows:


Criterion	Score
❤️ Next to proximity guests on adjacent seats* to each other	+20**
😊 Near to proximity guests on adjacent seats* to each other	+5**
💜 Not Next to proximity guests on adjacent seats* to each other	-10**
💀 Not Near to proximity guests on adjacent seats* to each other	-40**
❤️ Next to proximity guests on same table (or same section of an E-shaped table)	+10
😊 Near to proximity guests on same table (or same section of an E-shaped	+2




table)	
👤 Not Next to proximity guests on same table (or same section of an E-shaped table)	-5
💀 Not Near to proximity guests on same table (or same section of an E-shaped table)	-20
❤️ Next to proximity guests on adjacent tables***	+2
👤 Near to proximity guests on adjacent tables***	+1
👤 Not Next to proximity guests on adjacent tables***	-2
💀 Not Near to proximity guests on adjacent tables***	-4
Guest with at least one ❤️ or 👤 proximity, but none next to	-10
Guest with at least one ❤️ or 👤 proximity, but none on the same table (or same section of an E-shaped table)	-20
Male next to female	+2****
★ VIP guest assigned to VIP table	+10
★ VIP guest not assigned to VIP table (if there is one)	-10
Guest with no-one sat next to them	-9

Guest next to one empty seat	-3
Guest not assigned a seat (apart from locked guests and guests who aren't seated due to their RSVP status)	-100

*\* 2 seats are considered adjacent if they next to (left/right) of each other or if they are directly opposite each other and less than 2 metres (approx 6 feet) apart.*

*\*\* May be only 75% of this on narrow tables depending on the setting of **On narrow tables prefer near to/next to guests seated in the**  **Preferences** window.*

*\*\*\* 2 tables are considered adjacent if their centres are within 5m/ 15ft of each other.*


*\*\*\*\* 0 if you have unchecked **alternate males and females** in the  **Preferences** window.*



In addition  VIP guests have their scores multiplied by 3.

Once all the scores have been totalled a 'smoothing' function is applied to moderate the more extreme guest scores. The smoothing function spreads the happiness around - avoiding the situation where the best score is one with a few deliriously happy guests and lots of slightly miserable ones!

The scoring only takes account of whether guests are seated next to each other, on the same table (or the same section of an E-shaped table) or on adjacent tables. It doesn't allow for whether the guests might be able to see each other or are 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.

See also:

- [Improve the auto seat assignment](#)

### 2.8.3 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. 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 very quickly.

## 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:

$25! = 15511210043330985984000000$

$50! =$   
 $3041409320171337804361260816606476884437764156896051200000$   
 $0000000$

$100! =$   
 $9332621544394415268169923885626670049071596826438162146859$   
 $296389$   
 $5217599993229915608941463976156518286253697920827223758251$   
 $1852109168640$   
 $000000000000000000000000$

$200! =$   
 $7886578673647905035523632139321850622951359776871732632947$   
 $425332$   
 $4435944996340334292030428401198462390417721213891963883025$   
 $7642790242637$   
 $1050619266249528299311134628572707633172373969889439224456$   
 $2145166424025$   
 $4033291864131227428294853277524242407573903240321257405579$   
 $5686602260319$   
 $0417032406235170085879617892222278962370389737472000000000$   
 $00000000000000$   
 $000000000000000000000000000000$

500! =  
 1220136825991110068701238785423046926253574342803192842192  
 4135883858453731538819976054964475022032818630136164771482  
 0358416337872207817720048078520515932928547790757193933060  
 3772960859086270429174547882424912726344305670173270769461  
 0628023104526442188787894657547771498634943677810376442740  
 3382736539747138647787849543848959553753799042324106127132  
 6984327745715546309977202781014561081188373709531016356324  
 4329870295638966289116589747695720879269288712817800702651  
 7450776841071962439039432253642260523494585012991857150124  
 8706961568141625359056693423813008856249246891564126775654  
 4818865065938479517753608940057452389403357984763639449053  
 1306232374906644504882466507594673586207463792518420045936  
 9692981022263971952597190945217823331756934581508552332820  
 7628200234026269078983424517120062077146409794561161276291  
 4595123722991334016955236385094288559201872743379517301458  
 6357570828355780158735432768888680120399882384702151467605  
 4454076635359841744304801289383138968816394874696588175045  
 069263653381750554781286400000000000000000000000000000000  
 000000000000000000000000000000000000000000000000000000000  
 000000000000000000000000000000000000000000000000000000000

1000! = a number 2568 digits long (if you printed it out 5 digits per centimetre it would be more than 5 metres long).

4000! = a number 12674 digits long (if you printed it out 5 digits per centimetre it would be more than 25 metres long).






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



See also:




- [online factorial calculator](#)






## 2.9 Copying to the clipboard



### 2.9.1 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** You can click the  or  buttons at the top of the  **Table Chart**,  **Guest Chart** or  **Report** panes to paste the chart into Microsoft Word or Excel. You must have Microsoft Word or Excel installed.

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](#)

## 2.10 Printing

### 2.10.1 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.

The controls displayed will depend on the pane that you are printing.

If you only have a standard size (e.g. A4) printer you might find that text on the  **Floor Plan** pane isn't very legible when printed to a single A4 sheet. You may have to span multiple sheets or print it on a larger format printer. See [printing legible plans on a small format printer](#).

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](#)
- [Change the print pagination](#)
- [Change the printer or page size](#)

### 2.10.2 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](#)
- [Show one stationery item per couple/family/group](#)

## 2.11 Emailing

### 2.11.1 Emailing


You can email your plan using **File>** **Email Plan** or the equivalent **Main** tool bar button. This will add your plan to an email as an attachment.

PerfectTablePlan will attempt to use your standard email application. If you can't use the integrated email, just compose an email as usual and attach the plan file.



## 2.12 Exporting

### 2.12.1 Exporting

Data in PerfectTablePlan can be exported in a variety of formats for use in other applications, such as image editors, spreadsheets, wordprocessors and web browsers.

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 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.

## web

Export to web to upload a simplified version of the  **Guests** and  **Floor plan** panes to our server. You can email a link to this page to anyone you want to be able to look at your plan. Any device with an Internet connection and a reasonably modern web browser should be able to access it, including iPads. But please note that:

- You cannot make changes to the plan from your web browser. However you can modify the plan from your desktop computer and upload it again. If you re-export the plan, anyone looking at it in a web browser will be prompted if they wish to reload it.
- Your plan is not password protected and we cannot guarantee that your uploaded data will remain confidential. Anyone who knows (or guesses) the location of the page on our server will be able to look at your plan. Confidential plans should not be exported to our web server.
- You can export either detailed or minimal information. The minimal option does not include some of the more detailed data, such as guest notes, VIP status and special requirements.
- The web export service is provided 'as is' free of charge and with no warranty of any kind. We cannot guarantee 100% availability of our server and can withdraw the service at any time.
- We will delete uploaded plans from time to time to make space (typically after 30 days without being accessed).

See also:

- [Export formats](#)
- [Export window](#)
- [Export Data window](#)
- [Export VCard window](#)

- [Export to PDF format](#)
- [Export a chart/report to Excel/Word](#)
- [Export guest and seating data to Excel](#)
- [Export to web, iPad, Android and other devices](#)
- [Copying to the clipboard](#)

### 2.12.2 Export formats

PerfectTablePlan exports information in 8 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 can be imported into most applications with address books, including: Outlook, Palm Pilot desktop and the Apple Mac 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 by a web browser, such as Internet Explorer, Mozilla Firefox 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 by a wide range of applications.
- **web** - XML and binary data that is uploaded to <http://webexport.perfecttableplan.com> .

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 modify.

See also:

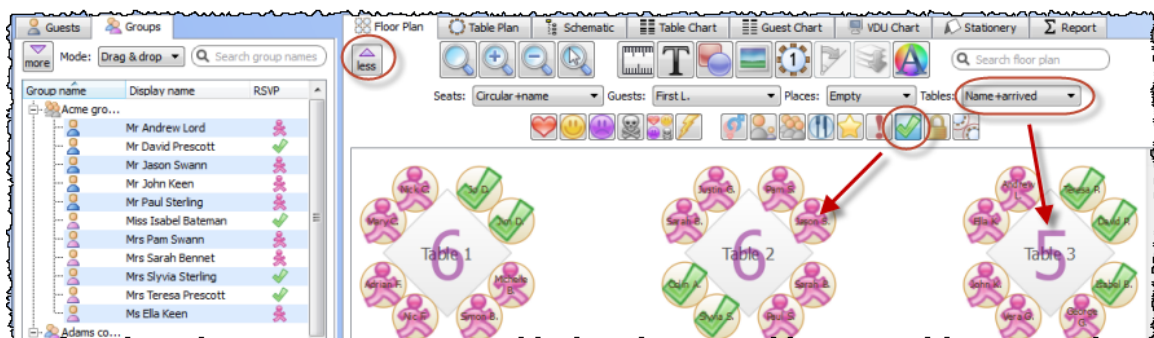
- [Choosing a format to export to](#)

## 2.13 Checking-in guests

### 2.13.1 Checking-in guests

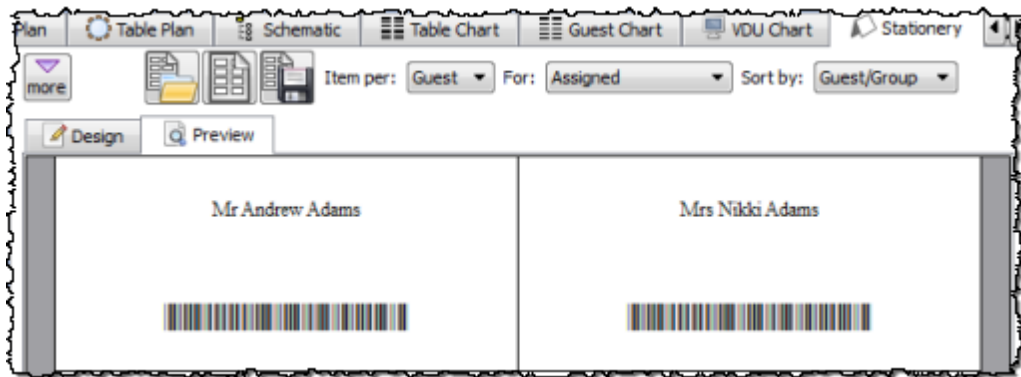
You can check-in guests at an event by changing their RSVP status to  **Arrived** as they check-in. You can visually track how seats are filling up in the  **Floor plan** pane by:

- displaying the RSVP status icon; and/or
- show the number of arrived/unarrived guests for each table



The total number of arrived guests is also shown in the [Status bar](#).

[Professional edition only](#)



You can check in guests by printing a barcode of their unique guest ID on their invitation, ticket or badge and then scanning this barcode into PerfectTablePlan as they arrive. This is much faster and less error prone than trying to find and update guest records by typing into PerfectTablePlan. You will need a barcode scanner and to install a barcode font. For more information see the [Check-in guests tutorial](#).

See also:

- [Assign \(or reassign\) seats in real time](#)

## 2.14 Backup files

### 2.14.1 Backup 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 backups 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 backups of the software:

- every time you **File>Save** the plan
- every time you do an auto assignment, export or print
- 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.

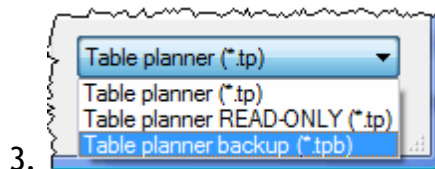
Backup files are created in a 'backup' folder in your plans folder. These backups are created with the extension .tpb (Table Plan Backup) and include a time and date stamp. For example, if you save myplan.tp at 17:42:05 on 11th February 2005 it will create a backup file myplan\_2005-02-11T17-42-05.tpb . 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 backup file either:


1. Select **File>Backups**, the **Find Plan Files** window will appear listing backups in date/time order.
2. Double-click on the appropriate backup.

or

1. select **File>**  **Open** or the equivalent **Main** tool bar button, the **Open** window will appear
2. select **Table planner backup (\*.tpb)** in the **Files of type** drop-down.



4. navigate to the folder containing the backup files, usually Documents \PerfectTablePlan\backups .
5. select the backup file you want and click the **Open** button

Check **at startup check for unsaved changes in backup files** in the **Backups** tab of the  **Preferences** window to check automatically for unsaved changes in backup files when PerfectTablePlan starts.

Note Any number of backup files on your harddisk will be useless if your harddisk dies. Make sure you backup your precious plan files to separate storage devices, e.g. to another computer, CD, memory stick or DropBox account. You can even email them to yourself.

## 2.15 Creating a good table plan

### 2.15.1 Creating a good table plan

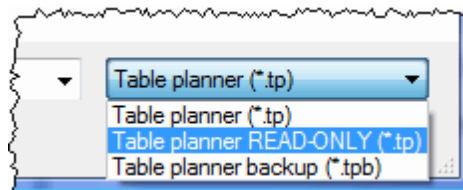
For an up-to-date list of tips on how to create a good table plan [see our tips web page](#).

## 2.16 Multiple user/computer access

### 2.16.1 Multiple user/computer access

PerfectTablePlan does not support multiple users editing the same plan at the same time.

On Windows PerfectTablePlan uses file locking to ensure that only one user can open a plan file to write (even across a network). Any number of users can open the same plan file with read-only access. You can disable file locking in the [Preferences window](#), but this is not recommended.



If you open a plan with read-only access then PerfectTablePlan will prompt you if it is modified by another application (e.g. by PerfectTablePlan on another computer) and give you the option to update. You can disable checking for updates in the [Preferences window](#).

There are various different ways you can share a plan file between multiple computers with one or more users. Which is best depends on your circumstances:

Approach	Advantages	Disadvantages
Copying plan files backwards and forwards by email attachment	No effort to set up.	Time taken to email plans.  Requires careful coordination if more than one person is editing a plan.

		You have to be careful not to lose changes by copying an old file over a new one.
Storing the plan file on a USB memory stick	No synchronization problems.	Requires a USB memory stick.  Only one person can be accessing the plan at any time.
Shared network drive.	A plan will be locked when one user has it open to write. Other users will only be able to open it as 'read only', preventing conflicting changes.  Users that have opened the plan as read-only will be notified of any changes and be given the option to update.	Requires access to a shared network drive.  File locking can be restrictive when you have multiple users trying to access a file.
Store your plan files in a <a href="#">Dropbox</a> , synchronised across all your machines.  (Do <u>not</u> synchronise your Program files \PerfectTablePlan folder, this could cause all sort of problems)	Changes on one machine are automatically <a href="#">synched</a> to all other machines. Conflicts (.e.g. two users making changes to the same file at the same time) are <a href="#">handled automatically</a> .  Easily manage sharing with other users on a plan by plan basis.  You can still access your plan even if you have no Internet access.	Requires a small amount of effort to set-up.  Changes only sync to other machines when you have Internet access.  If 2 users simultaneously edit the same plan on different machines at the same time you will end up with 2 versions of the plan.  An encrypted copy of your data is transmitted



	Dropbox keeps a 1 month history of changes and allows edits and deletions to be undone.	to and stored on the Dropbox server. This may not be appropriate for highly confidential plans.
	Works across Windows and Mac OS X.	Dropbox requires a payment if you want to store more than 2GB of file.

**Note** If you have multiple users then please ensure you have [the appropriate number of PerfectTablePlan licences](#).

See also:

- [Export to web, iPad and other devices](#)

## 2.17 Integrating with PerfectTablePlan

### 2.17.1 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 or CRM 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 :

```
c:\program files\perfecttableplan\tableplanner.exe -import
export.csv -import_type theknot
```

Please email [sales@perfecttableplan.com](mailto:sales@perfecttableplan.com) if you are interested in us adding a mapping for your import file format.

#### Integrate via XML file

The above approach is sufficient for most needs, however it only allows you to supply guest details, not details of tables or seating. If you need to do this you can generate your own PerfectTablePlan plan file and start PerfectTablePlan to open it.

For example to start up PerfectTablePlan and open a myplan.tp file:

```
c:\program files\perfecttableplan\tableplanner.exe
myplan.tp
```

PerfectTablePlan plan (.tp) files are in a [simple text/XML format](#). Please email [sales@perfecttableplan.com](mailto:sales@perfecttableplan.com) if you need help with the format.

#### 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.

### 2.17.2 Command line arguments

PerfectTablePlan recognises the following command line syntax:

argument	Comments	Example
<plan file>	The location of the .tp file to load at start-up.	myplan.tp
-import <import file>	The location of the data file to import on start-up.	-import import.csv
-import_type <import type>	A pre-defined import file type. PerfectTablePlan will look through the list of pre-defined types until it finds one that contains the string passed in. For example -import_type	-import_type evite

	<p>evite will match the pre-defined type "evite" (case is unimportant). This argument is ignored if – import is not specified.</p>	
--	------------------------------------------------------------------------------------------------------------------------------------	--

See also:

- [Integrating PerfectTablePlan](#)

### 2.17.3 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 v5.1.1 or later you should set the version to 12, e.g.:

```
<version value="12"/>
```

### [Advanced and Professional editions 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 free text 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.

## <viz\_colours>..</viz\_colours>

This section contains the colours used for visualizing gender, meal, group and custom fields in the  **Floor Plan**,  **Table Plan** and  **Stationery** panes.

## 2.18 Uninstalling

### 2.18.1 Uninstalling

To uninstall PerfectTablePlan:

- click on the Windows **Start** button.
- select **Control panel**, the **Control panel** window will appear
- double click on **Add or Remove programs**, the **Add or Remove Programs** window will appear.
- ensure PerfectTablePlan and its help window are closed.
- select PerfectTablePlan, click on the **Remove** button and click **Yes**.

Note You may require Windows Administrator rights to uninstall applications.

## 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 a colour coded spot to the stationery](#)

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

[Add a graphic/image/clipart to the floor plan](#)

[Add a graphic/image/clipart to the stationery](#)

[Add a new stationery layout](#)

[Add a personalised map to the stationery](#)

[Add a single seat to a rectangular/banquet table](#)

[Add a special character not on my keyboard](#)

[Add a title or text into the floor plan](#)

[Add custom fields](#)

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

[Arrange multiple seatings for an event](#)

[Assign guests to seats](#)

[Assign seating by guest type/category](#)

[Assign \(or reassign\) seats in real time](#)

[Change fonts and/or colours](#)

[Change how seats and guest names are displayed](#)

[Change proximity for multiple guests](#)

[Change table size or shape](#)

[Change text inside panes](#)

[Change the print pagination](#)

[Change the printer or paper size](#)

[Change the size of the room](#)

[Change the seat numbering](#)

[Change the table order](#)

[Check who a guest was seated next to at previous events](#)

[Check-in guests](#)

[Close the current plan](#)

[Choose a format to export to](#)

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

[Create address labels](#)

[Create a non-rectangular room](#)

[Create rectangular tables with seats on 1,2 or 3 sides](#)

[Create a re-usable template plan](#)

[Create an E-shaped table](#)

[Customize standard guest titles](#)

[Display seating on a VDU or plasma screen](#)

[Edit a property for multiple guests](#)

[Email my plan](#)

[Estimate numbers and budget](#)

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

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

[Export to iPad, Android and other devices](#)

[Export to PDF format](#)

[Find a missing plan file](#)

[Find free clipart](#)

[Find free textures](#)

[Handle guests with unknown names](#)

[Handle multiple rooms](#)

[Handle post-nominal titles](#)

[Handle sponsored tables](#)

[Import guest details from a website or application](#)

[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 non-English characters](#)

[Import proximity data](#)

[Import seating data](#)

[Improve the auto seat assignment](#)

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

[Liaise with caterers](#)

[Load sample stationery](#)

[Lock guests to seats](#)

[Merge guest names into stationery](#)

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

[Only assign guests who have accepted](#)

[Organize guests by company/organization](#)

[Order place cards](#)

[Print a guest list](#)

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

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

[Print stationery on blank sheets](#)

[Print stationery on press-out sheets](#)

[Print to poster size](#)

[Remove a stationery border or fold line](#)

[Rename/renumber tables](#)

[Retrieve old versions of the plan](#)

[Select multiple items](#)

[Show custom fields](#)

[Show gender](#)

[Show groups](#)

[Show meals](#)

[Show one stationery item per couple/family/group](#)

[Show seat numbers](#)

[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 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 **File>Save** the plan.
2. Right click on each table and select the **Proximity>**  **Not Near to**.
3. Recreate any  **Next to** or  **Near to** proximities (e.g. for couples) using **Ctrl** +click and then selecting the proximity from the right click menu. This may be easier if you [display groups](#).

[Professional edition only](#)

Instead of steps 2 and 3 above, in the [Bulk Edit Proximity window](#):

- Set **Change proximity** for to **Guests seated next to each other**, **Guests seats at same table** or (if you have 1 or more E-shaped tables) **Guests seated at same table section**, according to your preference.
- Set **With proximity** to **Neutral** (so you don't overwrite existing proximities).
- Set **To Proximity** to 🚫 **Not Near to**.
- Click **OK**.

4. Select **File** > 🪄 **Auto Assign Seats**.
5. Use drag and drop to fine-tune the seating plan as required.
6. Select **File** > **Save As...** to save the plan to a new file.
7. If another seating is required go to 2.

#### Advanced and Professional editions only

You can check who each guest is seated next to across multiple plans using the **Multi-plan** report in the [Σ Report pane](#).

**Note** If you have guests you don't want moved you can lock them to their seat. If a guest isn't attending a particular seating you can lock them to no seat: *Ctrl* +click to select these guests, **Edit**>**Unassign**, **Edit**>**Guest Property**>🔒**Locked**>🔒**Yes**.

### 3.2.2 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](#).

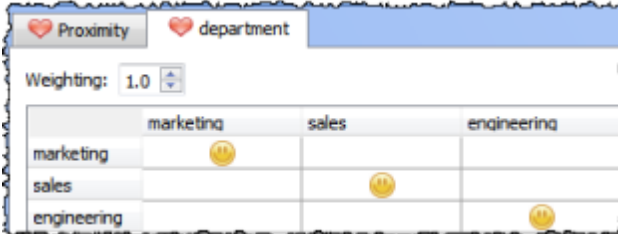
See also:

- [Improve the auto seat assignment](#)
- [Assign seats by guest type/category](#)
- [Only assign guests who have accepted](#)
- [Arrange multiple seating for an event](#)

### 3.2.3 Assign seating by guest type/category

#### [Professional edition only](#)

You can use custom fields to control the how the automatic seat assignment places different categories of guests. E.g. whether it should place guests from different departments or geographical areas together or apart. You can use **Weighting** to set different levels of importance to different custom proximities.



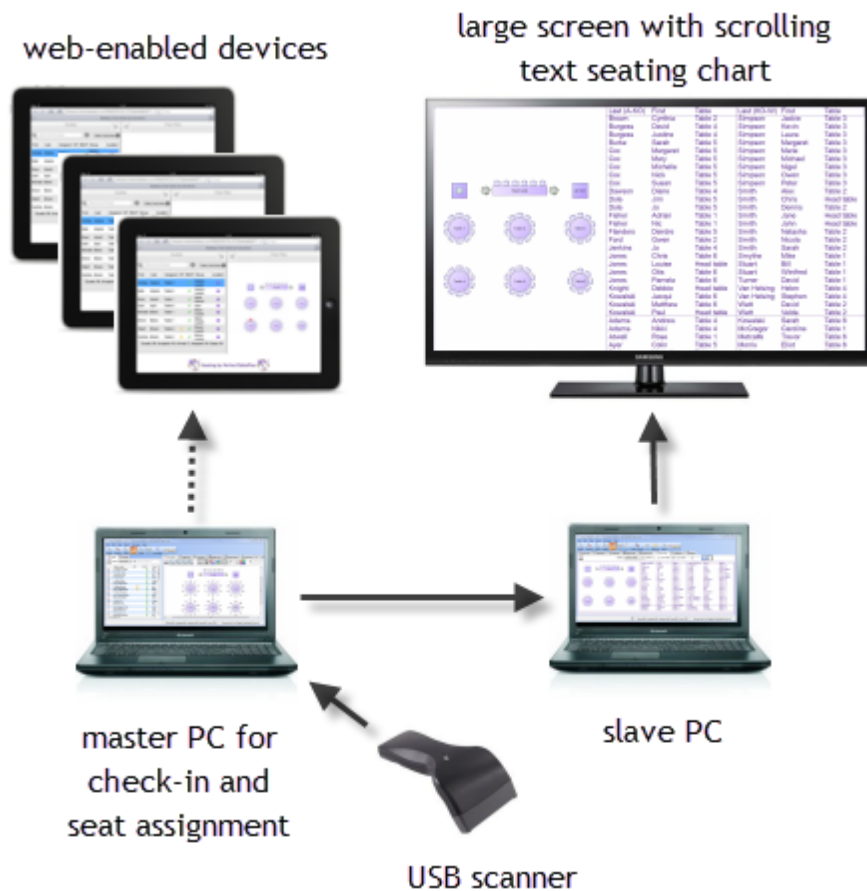
	marketing	sales	engineering
marketing	10		
sales		10	
engineering			10

See the [Custom field proximity pane](#) for more details.

 [Video with audio \(1:04 minutes\)](#)

### 3.2.4 Assign (or reassign) seats in real time


If you have an event where it is uncertain how many people will arrive, you may have to assign (or reassign) seats 'on the fly'. Standard paper seating charts and place cards aren't very useful in such cases. However the PerfectTablePlan [VDU Chart](#) pane can help you to display and update the seating on a large screen at the venue and/or [export to web](#) can display the seating on any web-enabled devices (e.g. iPads issued to assistants).



Example real time seat assignment setup

## Displaying seating assignments on a large screen








Before the event:

1. Create a plan. Mark any guests you expect to attend as having RSVP=✅ **Accepted**. Optionally assign them seats.
2. Set up the appropriate colours, fonts, number of columns etc in the  **VDU Chart** pane.

At the venue:





1. Set up 2 computers at the event. Ideally they should both have the same version of PerfectTablePlan installed. One is the 'master' and will be used to assign seats. The other is the 'slave' and will be used to display scrolling text on a large screen (e.g. a plasma display).

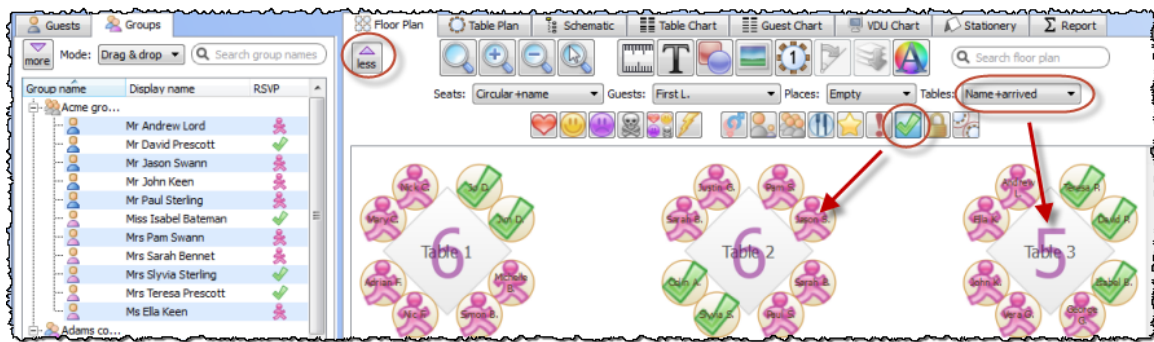


2. Ensure you have networking set up so the 'slave' can read files in a shared folder on the 'master'. Or you can use a shared [Dropbox](#) folder to share a folder via the Internet.
3. Ensure that the 'slave' is able to display on a large screen.
4. On the 'slave' set **When read-only plan updated to Reload without prompting** in the **General** tab of the  **Preferences** window.
5. On the 'master' select **View** >  **Output**, bring the  **VDU Chart** pane to the front and **File** >  **Save** the plan file.
6. On the 'slave' **File** > **Open** the plan file from the shared folder as **read-only**. Press the  button at the top of the  **VDU Chart** pane if the text isn't scrolling. Then press the  button to display full screen.

Note Read-only plans and automatic updating only works on the Windows version of PerfectTablePlan, so the 'slave' must be running Windows. The 'master' can be running Windows or Mac OS X.

During the event:

1. As guests arrive use the 'master' to:
  - a. Change their status to RSVP= **Arrived**. You can do this more quickly if you print a barcode on their ticket/invitation/badge and [check them in using a barcode scanner](#).
  - b. Assign them to seats (using drag and drop or automatic seat assignment) if they don't already have a seat and lock them in place.
  - c. **File** >  **Save** your changes on the 'master'.
2. The 'slave' should pick up your changes and refresh the  **VDU Chart** pane automatically.
3. You can monitor seat assignments in the  [Floor Plan](#) pane on the 'master'.



## Displaying the seating on iPads or other web-enabled devices



Before the event:

1. Create a plan. Mark any guests you expect to attend as having RSVP=✓  
**Accepted**. Optionally assign them seats.

At the venue:

1. Set up a laptop with the plan. Ensure the laptop and all the web-enabled devices have Internet access (e.g. through wifi).
2. Select **File>Export**.
3. Select **guests and floor plan (detailed)** to <http://webexport.perfecttableplan.com> (or **guests and floor plan (minimal)** to <http://webexport.perfecttableplan.com> if you don't want to export personal data such as VIP states and guest notes).
4. Check **Create a new email with the document added**.
5. Click **OK**. **Accept** the terms of use, if they appear.
6. Email a link to the plan to everyone who is going to access it from their iPad or other web-enabled device.
7. Have all the people with web-enabled devices click on the link they have been emailed to display the plan in a web browser.

During the event:

1. As guests arrive use the laptop to:
  - a. Change their status to RSVP= **Arrived**. You can do this more quickly if you print a barcode on their ticket/invitation/badge and [check them in using a barcode scanner](#).
  - b. Assign them to seats (using drag and drop or automatic seat assignment) if they don't already have a seat and lock them in place.
  - c. **File> Save** your changes.
  - d. Re-export the plan to web.
2. The web-enabled devices should pick up your changes and refresh the plan. They can use the up-to-date information to guide guests to their seats.

## Contingency planning

If you are going to attempt either of the above at a sizeable event, we recommend you try practising it first! You also need to have plans in place in case a laptop, the network or a plasma screen fails. In the unlikely event of PerfectTablePlan crashing, you should be able to retrieve previous version from the [automatic backups](#).

See also:

- [VDU Chart pane](#)
- [Display seating on a VDU or plasma screen](#)
- [Export to web, iPad and other devices](#)
- [Multi-user/computer access](#)

### 3.2.5 Check who a guest was seated next to at previous events

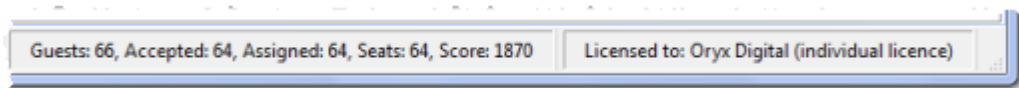
[Advanced and Professional editions only](#)

## Multi-plan report

You can use a [Multi-plan report](#) to see who a guest was sat next to (or on the same tables as) across multiple events.

### 3.2.6 Improve the auto seat assignment

PerfectTablePlan [scores](#) each seating arrangement on how good it is according to various factors, including: whether guests are seated according to their next to/near to/not next to/not near to proximities, whether guests have empty seats next to them, whether males are sat next to females etc. The total score is shown in the [Status bar](#).



When you run the auto seat assignment it tries to find the highest possible scoring seating arrangement using a [genetic algorithm](#).

The longer it runs for, the more combinations it can try, and the better your seating arrangement is likely to be. A few seconds is probably enough for 100 guests. But you might want to run it for an hour or more if you have >2000 guests, especially if your computer isn't very fast.

In the [Auto assign](#) tab of the  **Preferences** window you can change:

- how long the auto assign runs for
- whether to alternate males and female
- whether to seat guests opposite or left/right of each other on narrow tables

You can run the auto seat assignment as often as you like. Each time you run it, it will start with the current plan and try to improve on it. You can stop at any time and the best solution found so far will be displayed.

No matter how long you run it for, PerfectTablePlan can't guarantee to find the optimal solution. This is because the number of combinations for even a small table plan is [mind-bogglingly large](#). However PerfectTablePlan will usually get

quite close, fairly quickly.

The auto seat assign is only as good as the proximities you provide.

A combination of auto seat assignment and drag and drop often gives the best results. [Lock](#) any guests that you don't wish the auto seat assignment to move next time you run it.

See also:

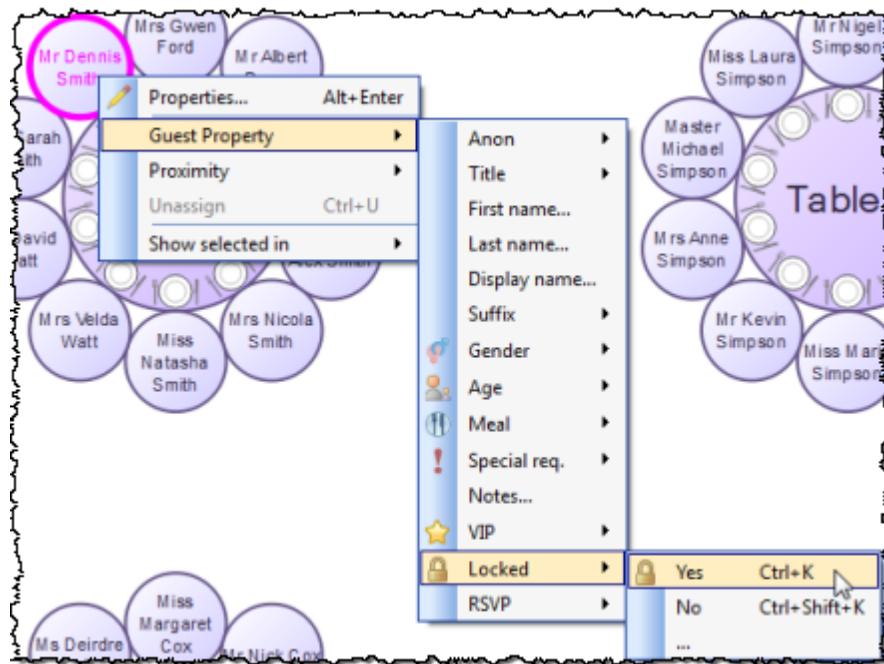
- [Automatic seat assignment](#)
- [Only assign guests who have accepted](#)
- [Assign seating by guest type/category](#)

### 3.2.7 Lock guests to seats

You can lock guests to a seat (or to no seat) to stop them being re-assigned by drag and drop or automatic seat assignment.

To lock (or unlock) the seat assignment for a guest:

1. Select the guests.
2. Right click and select **Guest Property>Locked>Yes (No)** from the pop-up menu or use the keyboard accelerators *Ctrl+K/Shift+Ctrl+K*.



You can also lock all the guests in a group or at a table by right clicking on the group/table and selecting **Guest Property>Locked>Yes** from the pop-up menu.

### 3.2.8 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**, **Guest Chart** or **VDU 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 an electronic version that can be accessed by a standard web browser but is not guaranteed to be confidential, choose web export.
- 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/report 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 *Ctrl+C*, this only copies selected text).
3. Start Excel/Word.
4. Select **Edit>Paste** in Excel/Word.



Alternatively just click the  or  buttons at the top of the pane.

See also:

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

### 3.4.3 Export guest and seating data to Excel

To export guest and seating data into a form that 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.

See also:

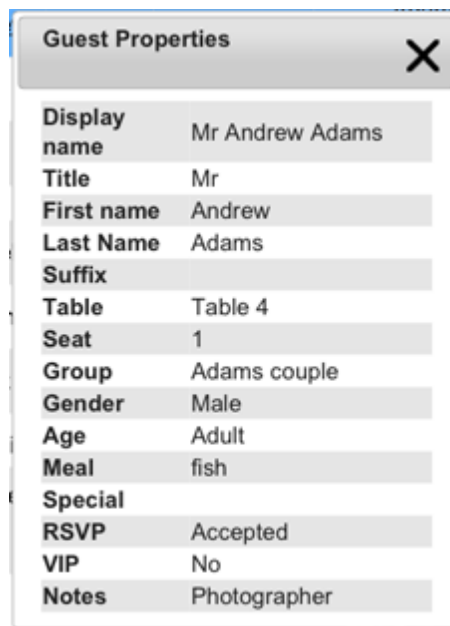
- [Export a chart/report to Excel/Word](#)



### 3.4.4 Export to web, iPad, Android and other devices



You can [export to web](#) and access your plan via any web-enabled device, including an iPad. The web version of the plan contains all the information about guests, groups and tables. For example, you could have a single laptop running PerfectTablePlan at a venue and 5 people viewing the plan using a web browser on their iPads via wifi. Any changes you make on the laptop and export to the web are then pushed out simultaneously to all 5 iPads.



Display name	Mr Andrew Adams
Title	Mr
First name	Andrew
Last Name	Adams
Suffix	
Table	Table 4
Seat	1
Group	Adams couple
Gender	Male
Age	Adult
Meal	fish
Special	
RSVP	Accepted
VIP	No
Notes	Photographer

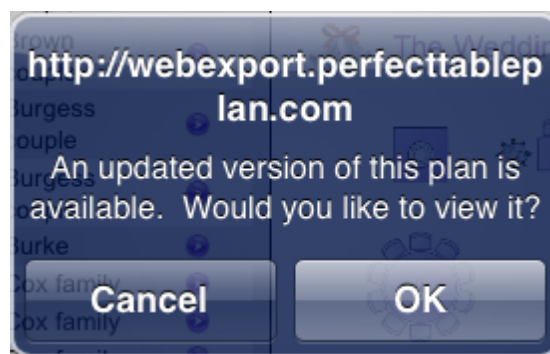
Hovering over a guest in the left pane shows where they are seated in the right pane. You can also search guests and groups and change between interfaces more suitable for mouse-based and touch-based devices.



Search names and groups

Tablet / Touch Device

You can't edit the plan from a web browser, but you can re-export your plan to web and anyone looking at the plan in a browser will automatically be prompted on whether they wish to load the updates.








**Note** Web export is via our server. We provide this as a free service. We cannot guarantee 100% availability.



If the device has an email connection and can display PDFs you can also [export to PDF](#) and then email it to the device as an attachment. You can also share

PDFs with an iPad using [Dropbox](#) or iTunes + the free iBooks app.

 [Video with audio \(2:29 minutes\)](#)

### 3.4.5 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 Windows

On Windows you can use the free **PDF-Creator** software. Once installed PDF-creator appears as a another printer, but when you print to it creates a PDF document.

- [PDF-creator home page](#)
- [PDF-creator download page](#)
- [PDF-creator readme file](#)

PDF-Creator is an open source software package. It is available free of charge, but you must obey the terms of the licence. PDF-creator is available under the [Gnu Public Licence](#) or the (more restrictive) [Alladin Free Public Licence](#). If you find this tool useful we suggest you support them with a small donation.

Note that PDFs produced by PDF Creator are likely to be lower quality than PDFs produced by exporting. However the PDF file may also be significantly smaller.



We are not able to offer any support for third party software. Use of third party software is entirely at your own risk.

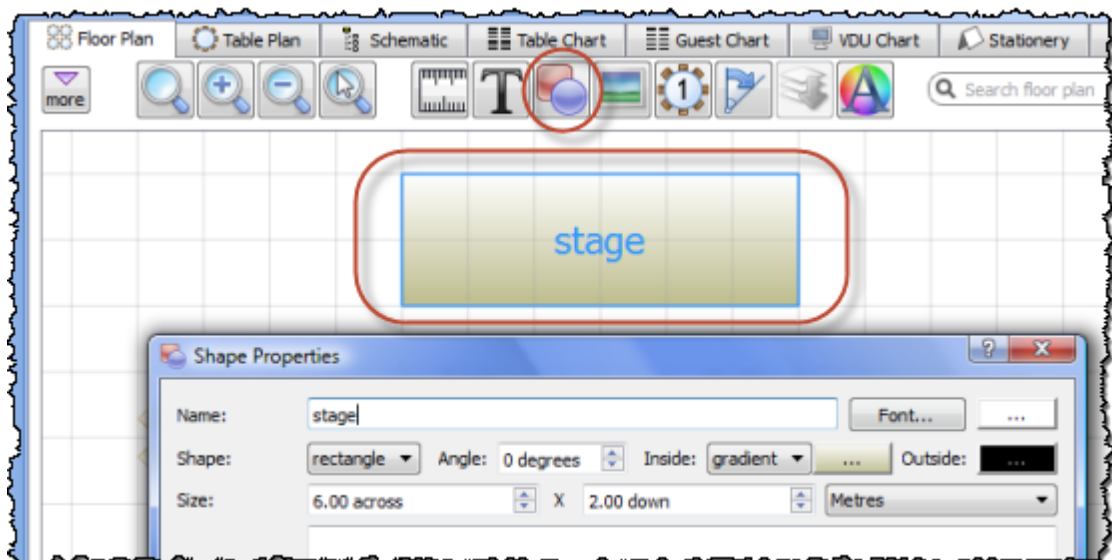
## Checking the output

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 floor plan


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.






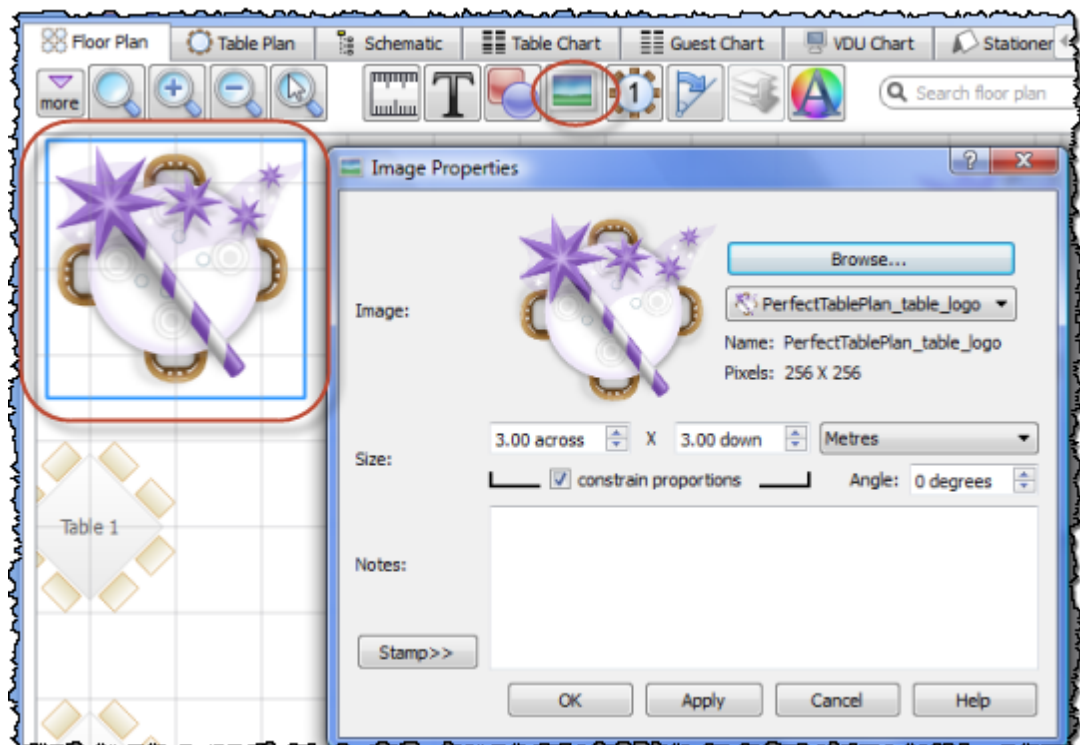
See also:

- [Add a graphic/image/clipart to the floor plan](#)
- [Add a title or text into the floor plan](#)

### 3.5.2 Add a graphic/image/clipart to the floor plan

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.



 [Video with audio \(1:11 minutes\)](#)


See also:

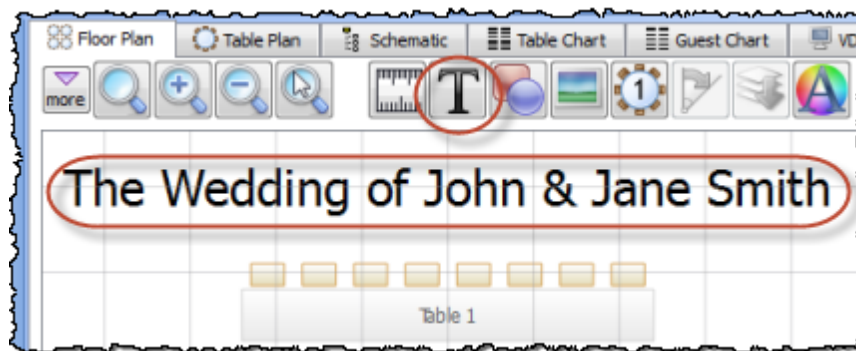
- [Find free clipart](#)
- [Find free textures](#)
- [Use an image of the venue](#)

- [Add a dance floor, stage etc to the floor plan](#)
- [Add a title or text into the floor plan](#)

### 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.

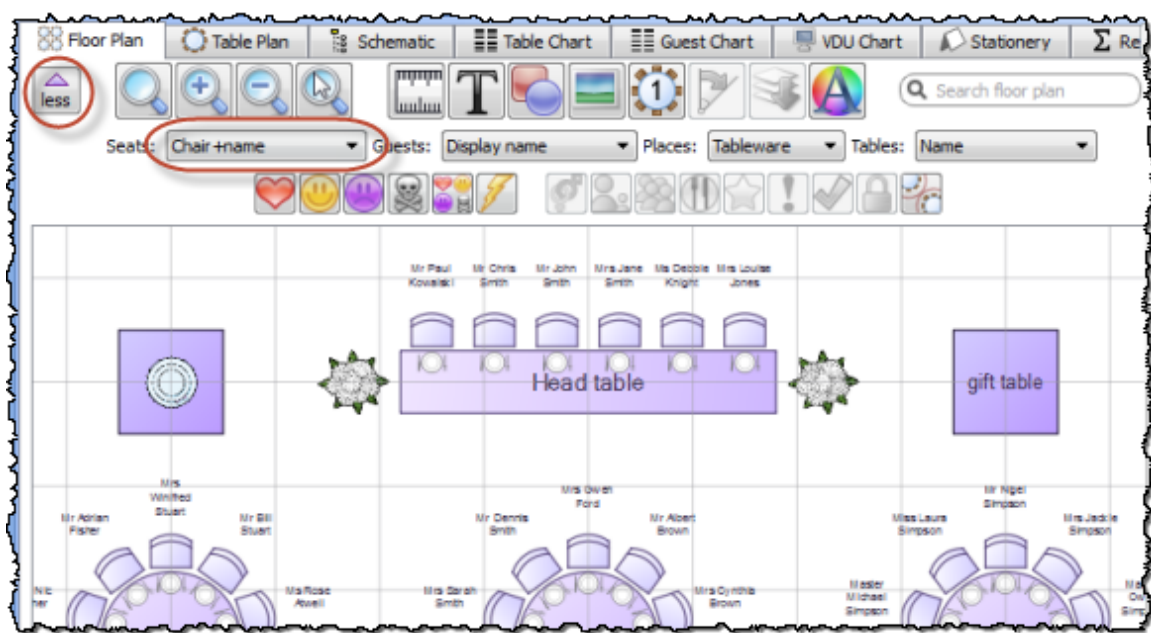
### 3.5.4 Change how seats and guest names are displayed

To change how the names of guests are displayed in the  Floor plan and  Table plan panes (e.g. J. Smith or Mr John Smith):

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

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.

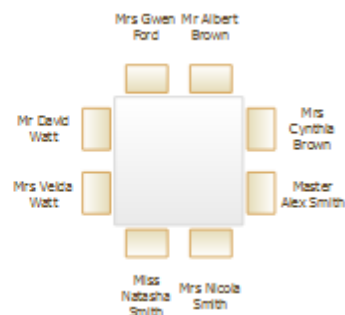


Example layouts for different **Seats** settings:

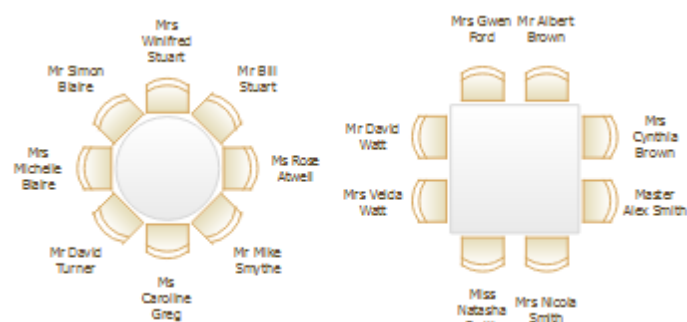
Circular+name



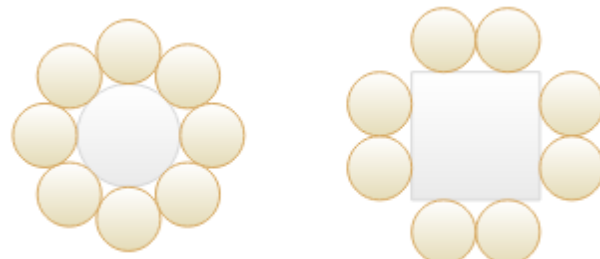
Rectangular+name



Chair+name



Circular



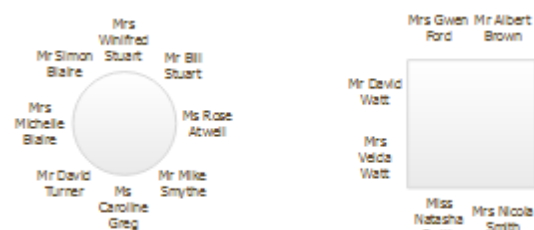
Rectangular



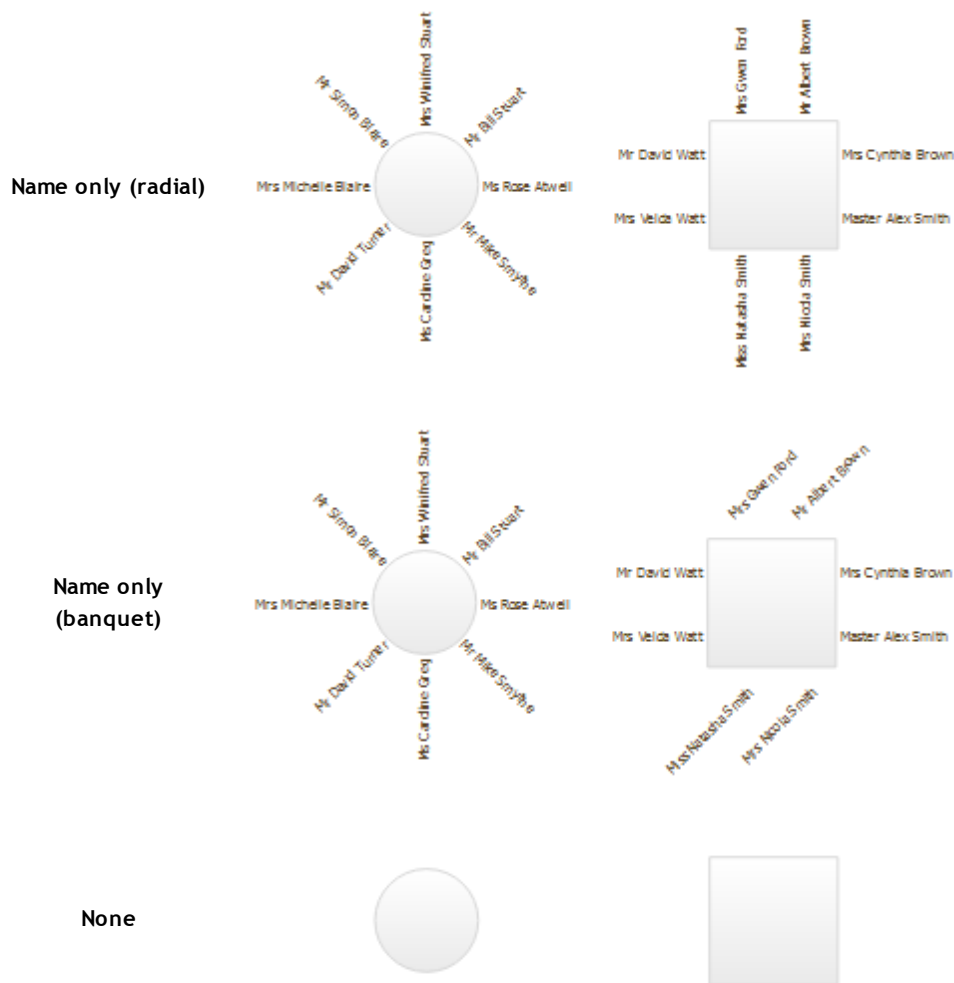
Chair



Name only







**Note** If the name of a guest can't be fitted into the space available in the **Floor Plan** or **Table Plan** pane, the font will automatically be scaled smaller for that name to try to make it fit.

See also:

- [Names and titles](#)
- [Show unassigned seats](#)
- [Show VIP/Special/RSVP/Locked](#)

### 3.5.5 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**.

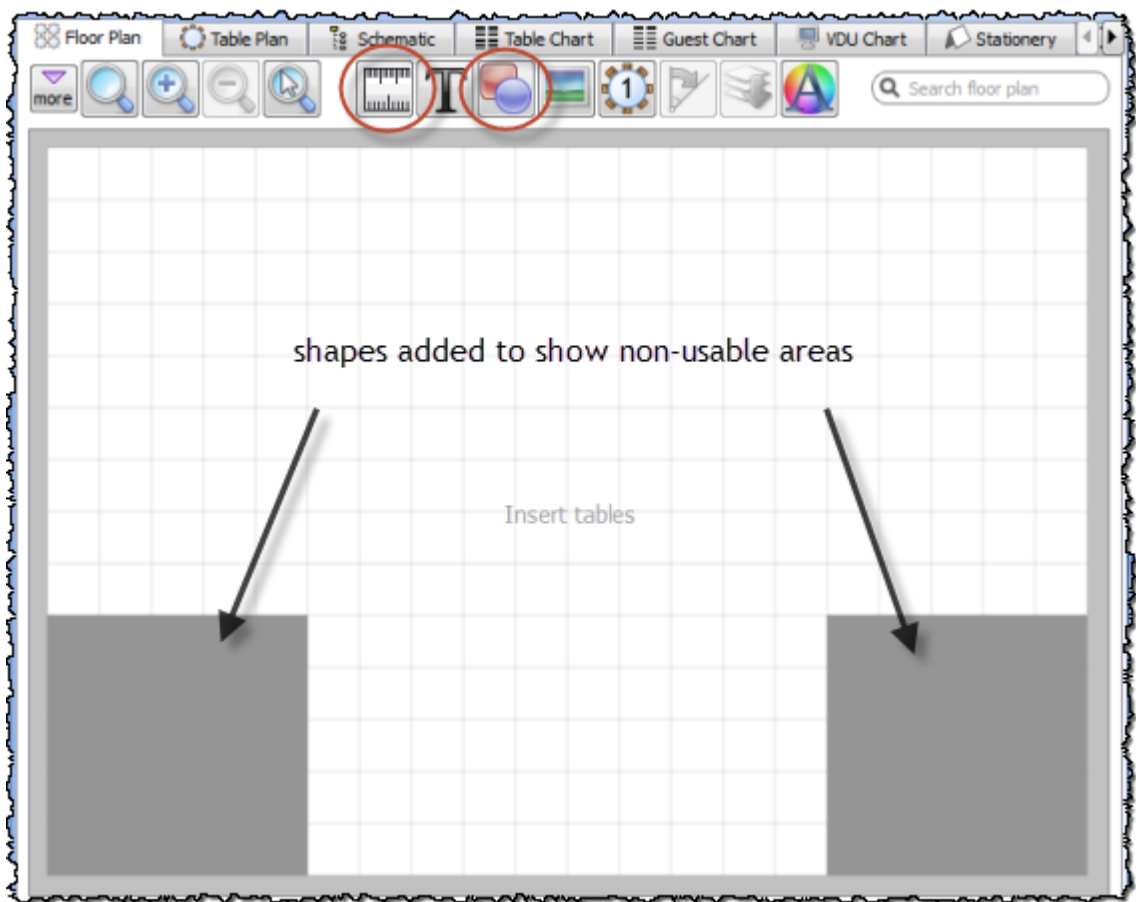
See also:

- [Create a non-rectangular room](#)
- [Handle multiple rooms](#)
- [Space tables correctly](#)

### 3.5.6 Create a non-rectangular room

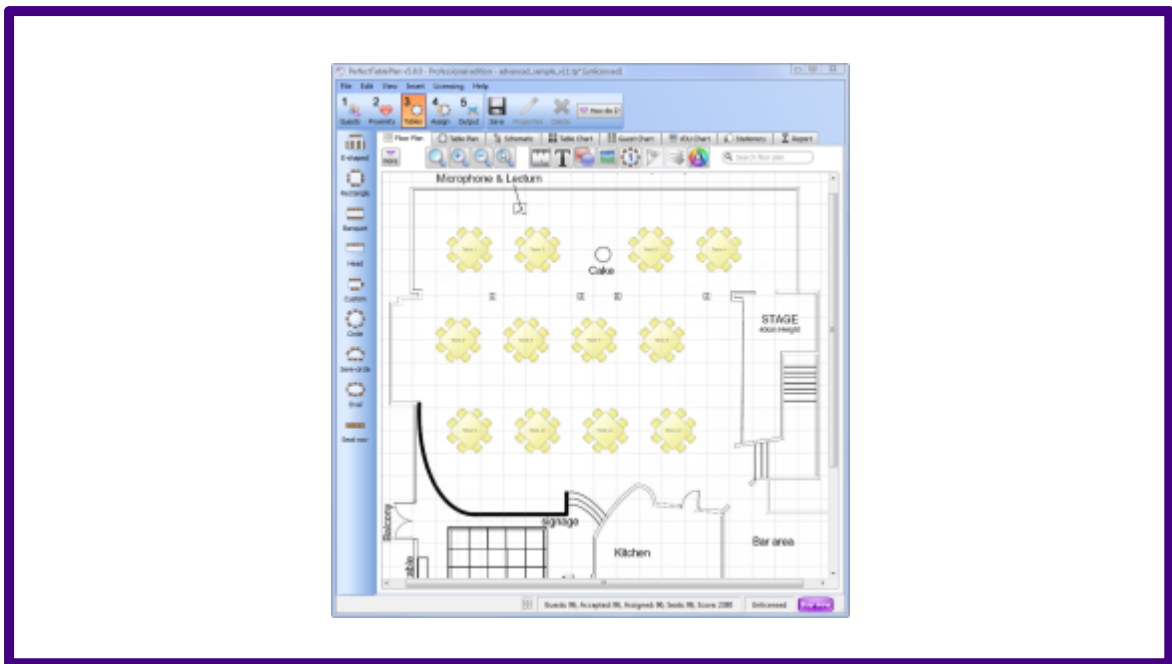
To create a non-rectangular room (e.g. 'T' shaped or 'L' shaped):

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 editions only](#)

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

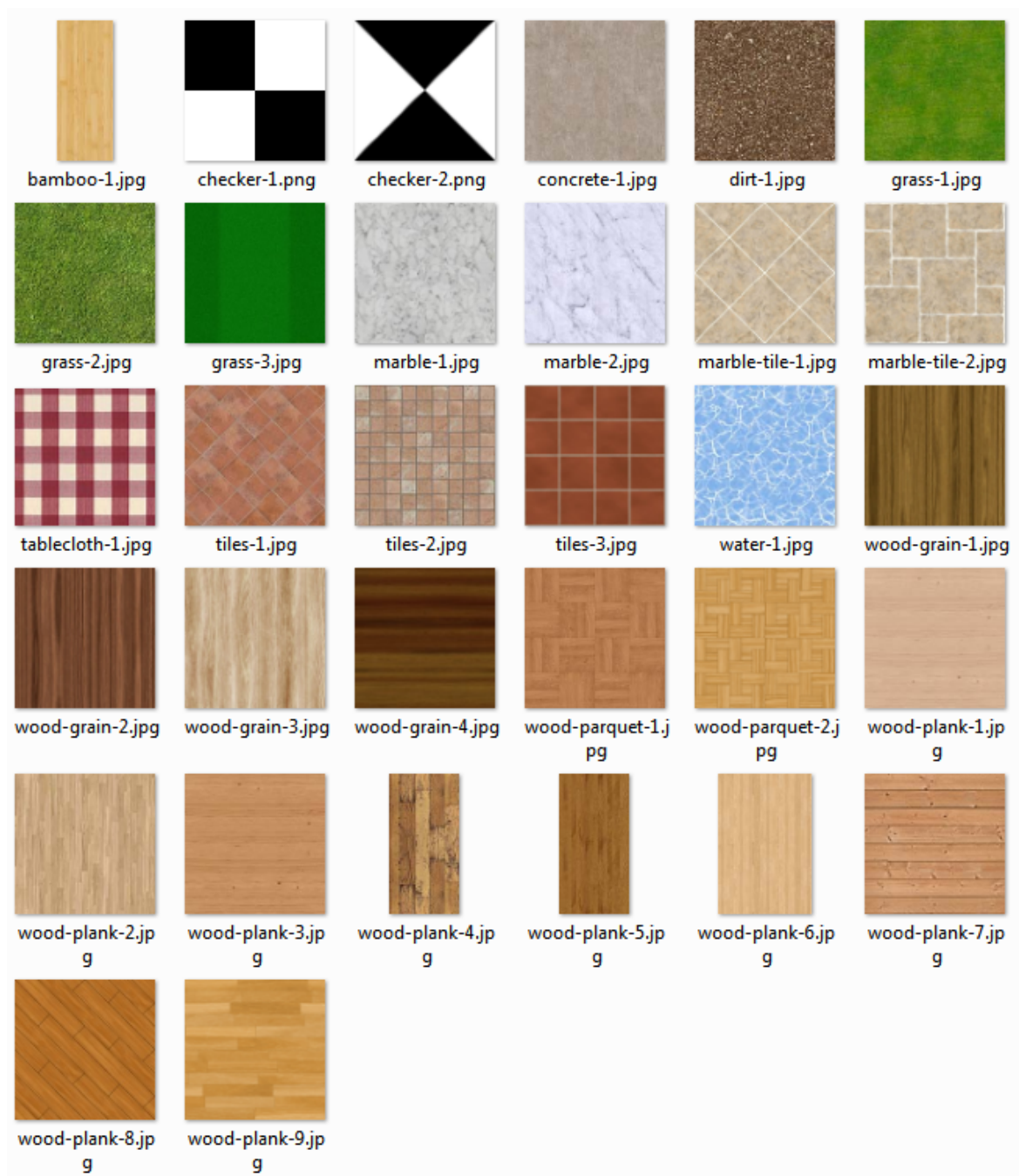


See also:

- [Create a re-usable template plan](#)
- [Change the size of the room](#)
- [Handle multiple rooms](#)

### 3.5.7 Find free textures

We install a range of textures with PerfectTablePlan. Usually these are installed into sub-folders of your Documents/PerfectTablePlan/textures folder.



These textures all tile seamlessly, i.e. you can't see the joins where one tile ends and the next begins. There should be no need to mirror them.

Storing large texture images in your plan will make your plan file large and may slow down PerfectTablePlan.

You can use tools such as Google image search to find textures. Many are available free of charge. Search for terms such as "seamless textures". You can also find good quality free textures on a number of web sites, including:

<http://www.goodtextures.com/>

<http://www.3d-diva.com>

<http://textures-seamless.blogspot.it/>

<http://seamless-pixels.blogspot.co.uk/>

<http://textures101.com>

<http://zooboingreview.blogspot.co.uk>

Ideally a texture image should be in PNG or high quality JPG format and should have at least 40 pixels for each cm (100 pixels for each inch) that you want to print it at. E.g. If you want to repeat your texture every 2.5 cm (1 inch) across on your printout, it should be at least 100 pixels across.




Make sure you comply with the copyright/licensing terms of any textures you use. See the .txt file in the textures folder for more details on licensing of the textures we install with PerfectTablePlan.

See also:

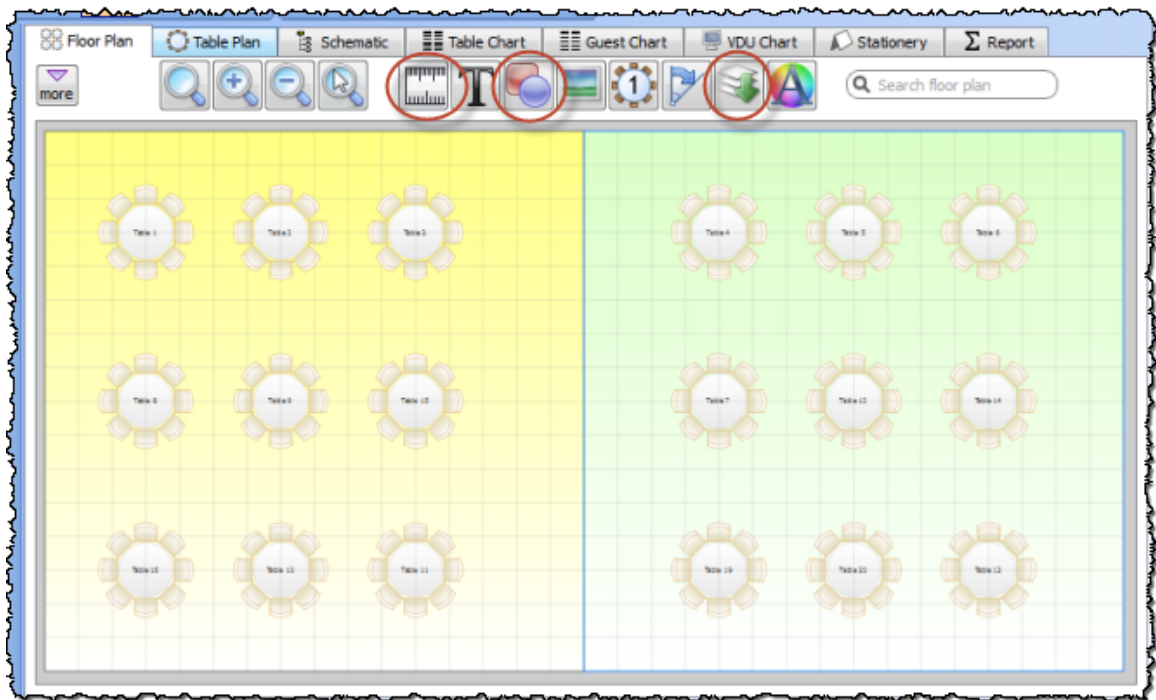
- [Select Texture window](#)
- [Find free clipart](#)
- [a Photoshop tutorial on how to create your own seamless textures](#)

### 3.5.8 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.







See also:

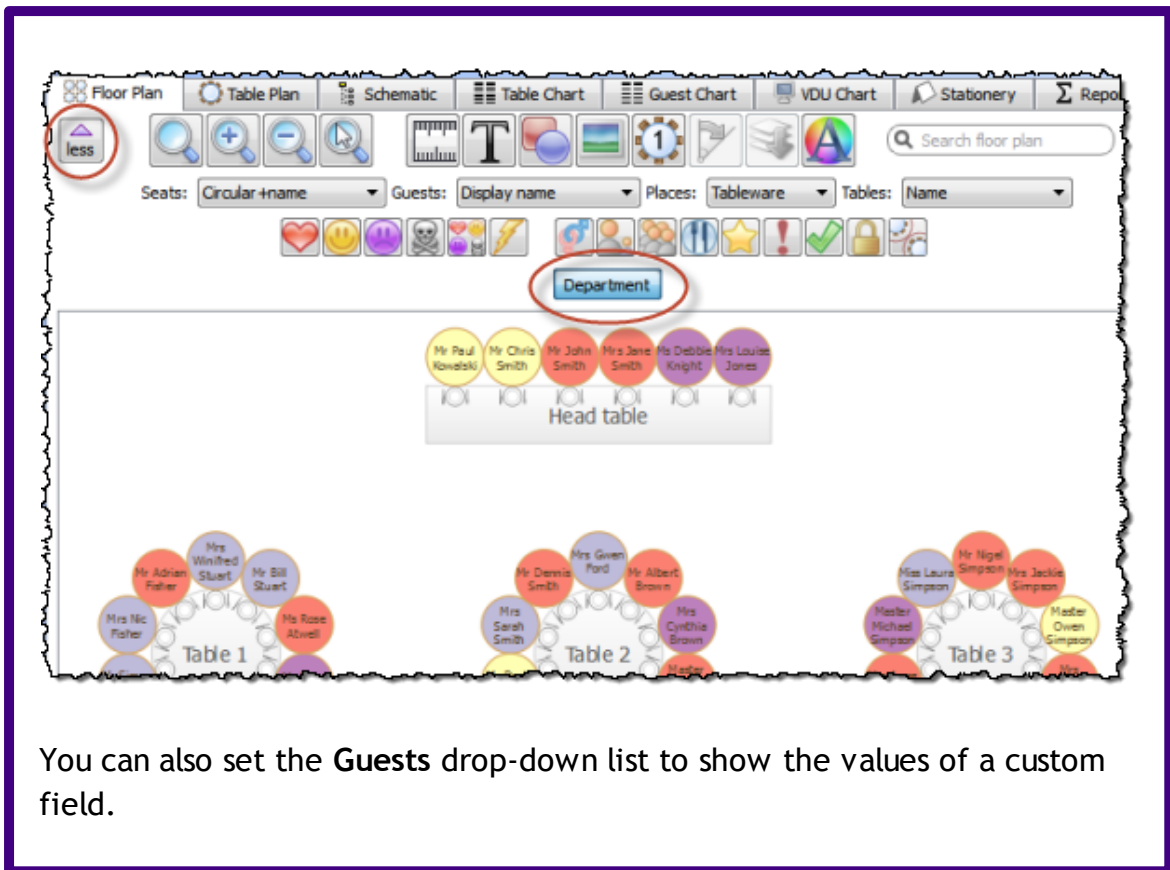
- [Change the size of the room](#)
- [Create a non-rectangular room](#)

### 3.5.9 Show custom fields

#### [Advanced and Professional editions only](#)

To show [custom field](#) values of type Yes/No, Selection or Tags 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 custom field button. You can change the colours used in the  [Visualization colours window](#).

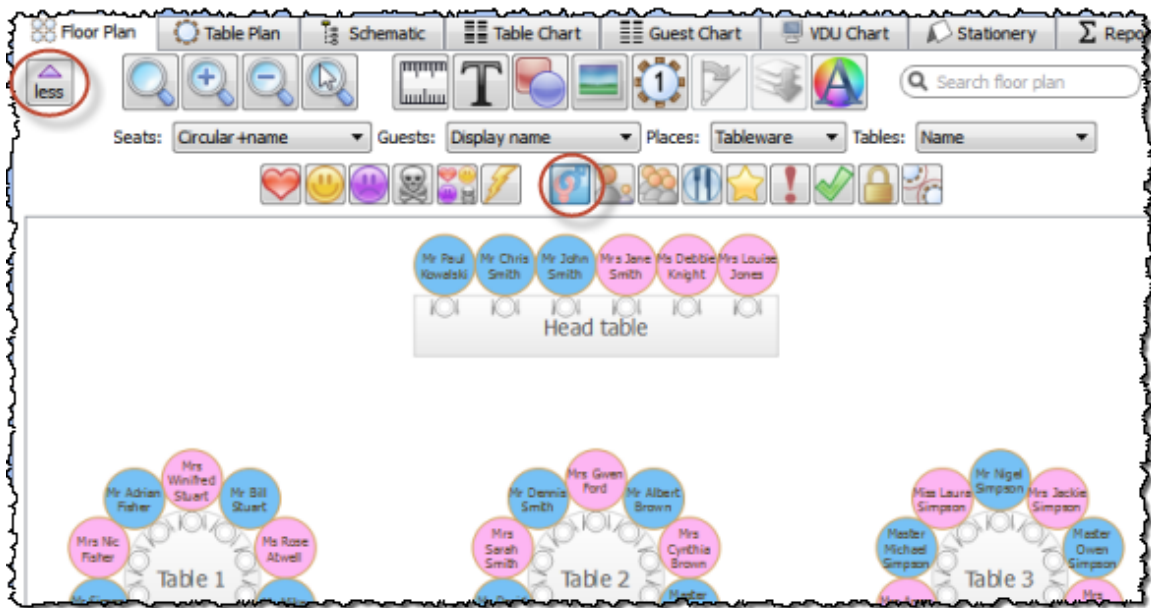


### 3.5.10 Show gender

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. You can change the colours used in the [Visualization colours window](#).





### 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 can change the colours used in the [Visualization colours window](#).



### 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 can change the colours used in the  [Visualization colours window](#).

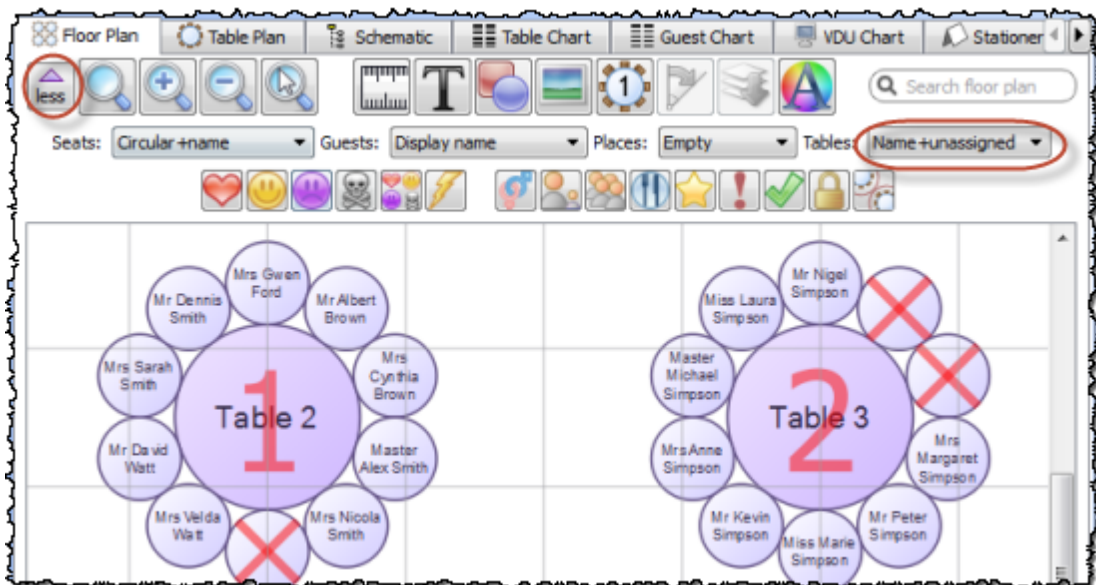


You can also set the **Guests** drop-down list to **Meal**.

### 3.5.13 Show unassigned seats

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

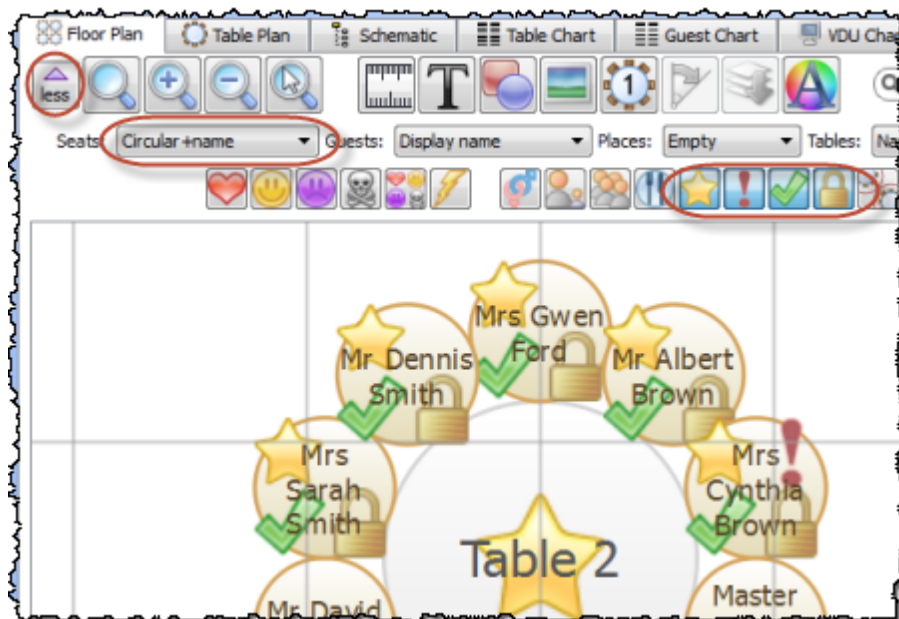
1. Click on the  button at the top-left of the pane.
2. Set the **Tables** drop-down list to **Name+unassigned**. The number of unassigned seats will be shown in the centre of each table and unassigned seats will be shown with a red cross.



### 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.



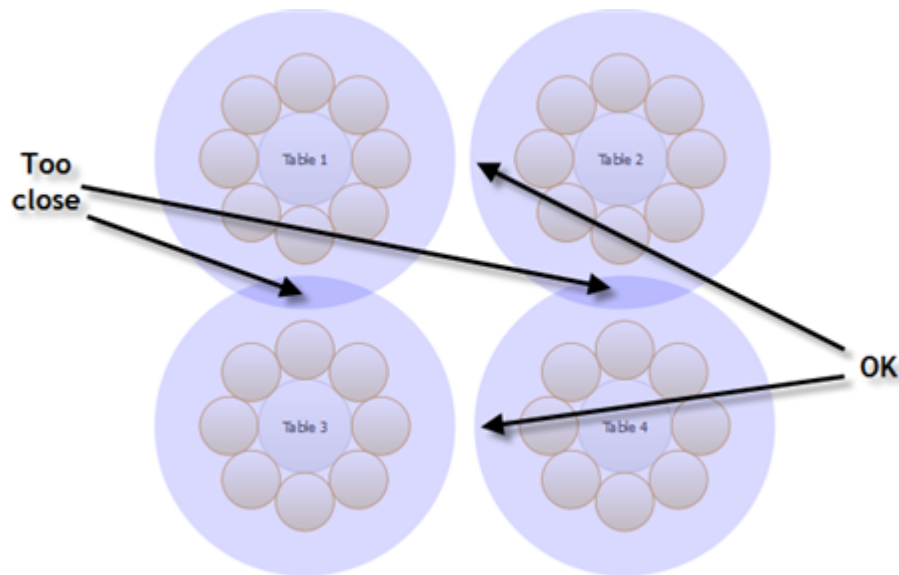
Note This option is only available if you are [displaying seats](#).


### 3.5.15 Space tables correctly

To show spacing guides around tables in the  **Floor Plan** pane:

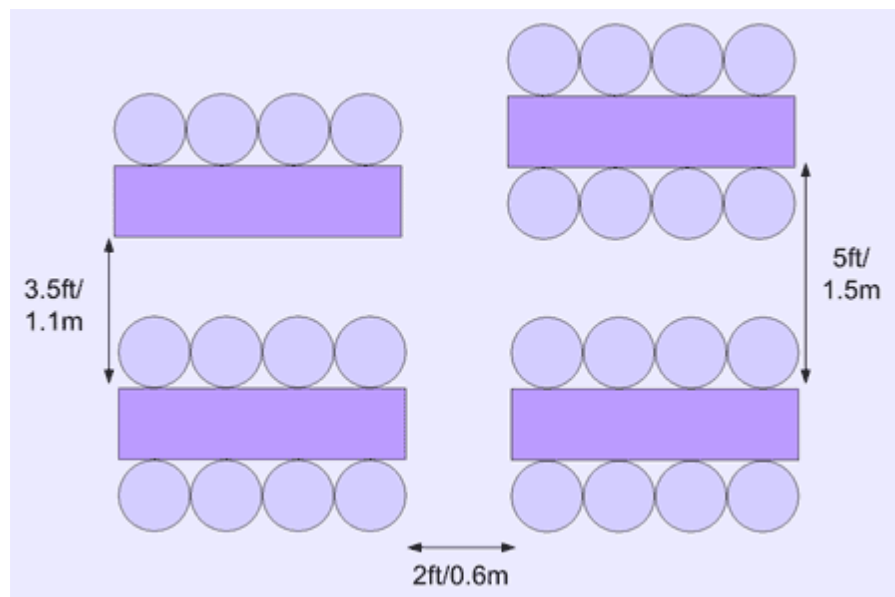
1. Click on the  button at the top-left of the pane.
2. Click on the  button.

A coloured guide will appear around each table according to the parameters in the **Table spacing** window. This makes it easy to see whether tables have been placed too close to each other. You can control the size, colour and the transparency of these guides.



Click the  button again to turn off the spacing guides.

Typically it is reckoned that the following spacings are a minimum for allowing guests and staff to move between tables:



These equate to values for **Spacing from side with seats** and **Spacing from side without seats** of 0.75m and 0.3m respectively. These are set as the default values.

Note The circular seats are not a realistic size. You may be better of [using rectangular seats, chairs or not displaying the seats](#).

If most of your tables are the same size and shape and you want to space them evenly, you can [create a snap grid](#) of the appropriate size. For example, if your tables are 2m in diameter and you want 1.5m between them, you can create a 3.5m snap grid to snap the table centres to.

Spacings are not shown for rows of seats.

Important Don't forget about emergency exit routes and fire regulations when you set-up your floor plan.




See also:


- [Change the size of the room](#)
- [Turn the floor plan grid on/off](#)

### 3.5.16 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). Every fifth line

of the drawn grid is shown darker to make it easier to count grid squares. 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**.

Note If you want to print or export the grid you have to check **Draw grid** and include in print/copy/export in the  **Dimensions** window.




See also:

- [Dimensions window](#)

### 3.5.17 Use an image of the venue

#### [Advanced and Professional editions 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 illustrated by the image (in metres or feet). It is important you get this correct or the floor plan won't be to scale (see below).
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

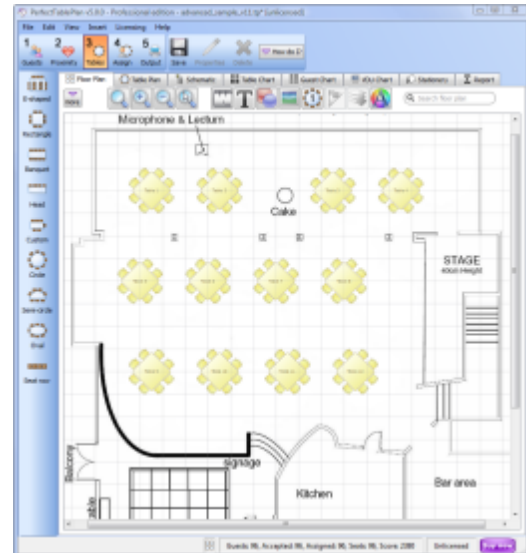


image used as floor plan background with tables added

## Scaling the image correctly

If you are using a background image it is important to scale it correctly. If the image is cropped to exactly the same size as the venue and you know the dimensions of the venue in metres or feet, this is no problem. But often the image will be larger than the room (e.g. include a border). In this case you can either crop the image to known size or you can calculate the size of the whole image. It is quite simple to work out the size of the whole image, as long as you know the size of an identifiable feature on the image (e.g. the width of a room). Here is how to do it:

You need to work out the width of the whole image in metres (IA).

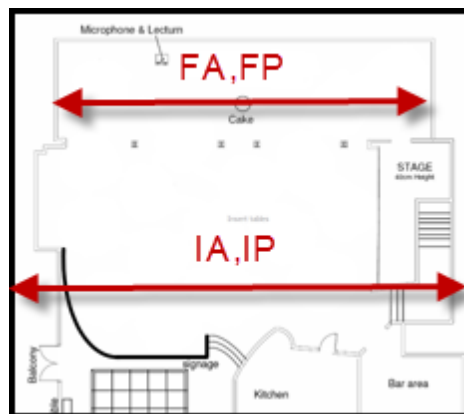
- Choose a horizontal feature on your image of a known size in metres (FA).
- Measure how big that feature is, in pixels, on your image (FP).
- Measure the width of the whole image in pixels (IP).

The ratio of pixels to metres is  $FP/FA$  which is the same as  $IP/IA$ . So the width of the whole image in metres,  $IA = IP \times FA/FP$ .

Note that you can change metres for feet or horizontal for vertical in the above, as long as you are consistent. We don't recommend using diagonal features, as this makes everything more complicated.

You can work out the size in pixels using a simple drawing tool, such as MSPaint on Windows.

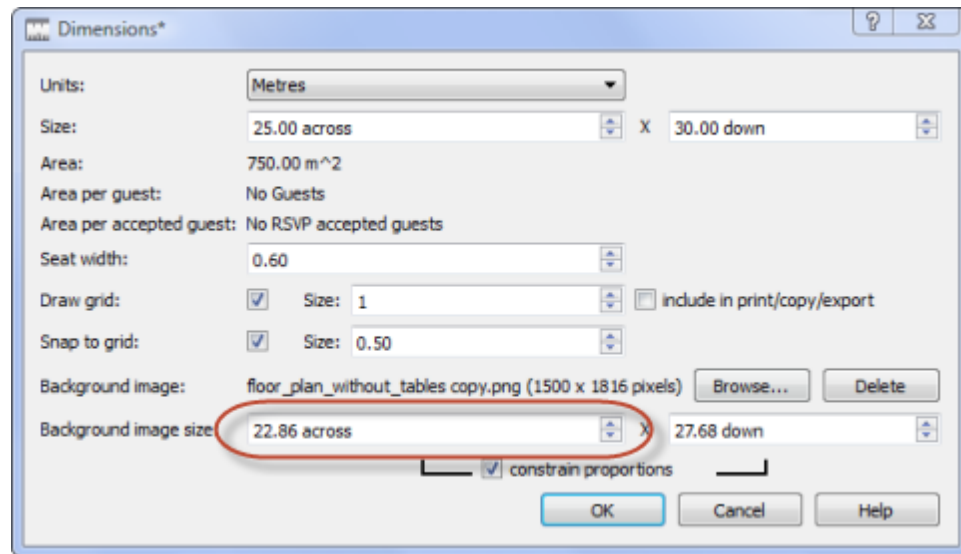
### Example



We have an image that is 800 pixels across (IP). We know the width of the room is 20 metres (FA). We can measure that the width of the room in pixels is 700 (FP). We need to know the width of the whole image (IA).

$IA = IP \times FA/FP = 800 \times 20 / 700 = 22.86$  metres . We can now set this as the across size of the **Background image size**.





The **down** part of the **Background image size** will be set automatically as long as you leave **constrain proportions** checked.

You can verify that you got the scale correct by inserting a table or [shape](#) the same size as a known feature of the floor plan and checking that the size matches.


If maths isn't your thing and you get really stuck on this, [contact support](#).

 [Video with audio \(0:26 minutes\)](#)

See also:


- [Change the size of the room](#)
- [Turn the floor plan grid on/off](#)


### 3.5.18 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.

Toggle the  button on/off to magnify the area under the mouse cursor. Magnification allows you to read a large plan without having to zoom in and out.

You can pan from side to side while zoomed in by left-clicking on the  **Floor Plan** pane background and dragging it.

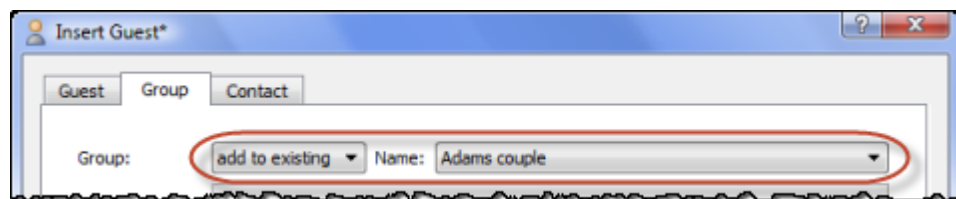
You can also zoom and pan using the wheel on your mouse (if you have one) depending on the **Floor/Table Plan pane mouse wheel behaviour** settings in the  [Preferences window](#).

## 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.

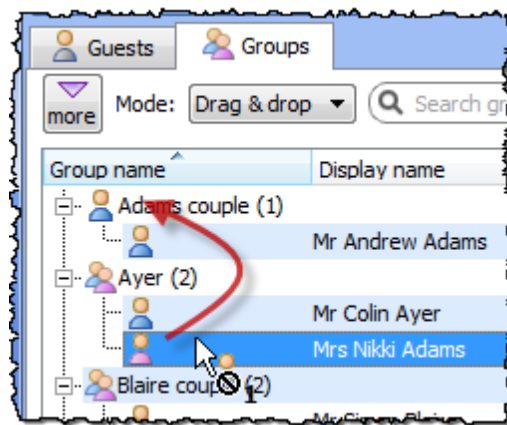


See also:

- [Move a guest from one group to another](#)

### 3.6.2 Move guests from one group to another

Select the guest in the  **Groups** pane and drag them to the appropriate group.



Alternatively you can use **Edit>Change Group** or set the  **Guests** pane **Mode** to **Edit** and edit the **Group** column.

See also:


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

## 3.7 Guests

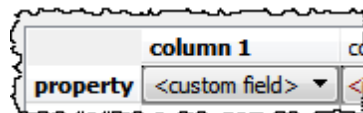
### 3.7.1 Add custom fields

#### Advanced and Professional editions 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>X Custom fields...**
2. Click the  **Add** button.
3. Select the **Type** (+Allowed values for selection type) and **Default value**.
4. Click **OK**.

You can also create custom fields during import by selecting **<custom field>** from the drop-down menu at the top of an import column.




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

 [Video with audio \(1:52 minutes\)](#)

### 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 *Ctrl+period* (in the **Main** window hold down the *Ctrl* 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](#).

See also:

- [Customize standard guest titles](#)

### 3.7.3 Check-in guests

You can use PerfectTablePlan to [check-in guests electronically](#) as they arrive at an event. You can use [barcodes and a USB scanner](#) to speed up this process. You can even [\(re\)assign seats in real time](#) as guests arrive.

### 3.7.4 Copy guests from one plan to another

Just drag the guests from one plan to the other:

1. Start 2 instances of PerfectTablePlan.
2. Select the guests you want to copy from the **Guests** or **Groups** pane of the first instance of PerfectTablePlan (*Ctrl*+*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.



See also:

- [Create a re-usable template plan](#)

### 3.7.5 Customize 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.

See also:

- [Handle post nominal titles](#)
- [Edit a property for multiple guests](#)
- [Add or remove dots at the end of titles](#)

### 3.7.6 Edit a property for multiple guests

To change a property for multiple guests in a single operation:

1. Select multiple guests in the  **Guests**,  **Groups**,  **Floor plan**,  **Table plan** or  **Schematic** panes using *Ctrl+click/Shift+click* (*Ctrl+A* to select all). Note that you can select tables or groups to edit the properties of all guests sat at those tables or belonging to those groups.
2. Select **Edit>Guest Property** and then choose the appropriate property and value. Choosing ... will display the [Edit Guest Property window](#).

**Note** You can use menu keyboard accelerators to access this menu without using the mouse. For example, you can type *Alt+E+Y+G+M* to change the selected guests to Male. This is quicker than using the mouse to select **Edit>Guest property>Gender>Male**. Hold down the *Alt* key to see the menu keyboard accelerators.

 [Video with audio \(1:48 minutes\)](#)

See also:

- [Select multiple items](#)
- [Change proximity for multiple guests](#)

### 3.7.7 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** or **Num. in group** 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.

[Video with audio \(0:29 minutes\)](#)

### 3.7.8 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 **Suffix** field in the  **Guest Properties** window. For example you might have:

Field	Example
Title	Sir
First name	John
Last name	Smith
Suffix	PhD
Display name	Sir John Smith PhD

See also:

- [Names and titles](#)

### 3.7.9 Organize guests by company/organization

You can place all the guests from the same organization in a group together. Note however:

- you won't be able to further group couples within this group (groups within groups are not supported)
- all guests within a group share a single set of contact details

If using groups isn't convenient you can list the organization in the guest **Notes** field instead.

You can also list the organization on a separate line by using **\*\*** in the guest **Display name** field, e.g.:

Mr John Smith\*\*Acme Ltd

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



### [Advanced and Professional editions only](#)

Alternatively you can [add a custom field](#) of type **Selection** or **Text** and store the organization name in this field. Using a custom field of type **Selection** has several advantages, including: better reporting, the ability to [visualize the different organizations in different colours](#) and (in the Professional edition) the option to use it in [custom seat assignment](#).


See also:

- [Edit a property for multiple guests](#)
- [Handle sponsored tables](#)
- [Groups](#)

### 3.7.10 **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".

### 3.7.11 **Turn on/off guest name capitalisation**

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

## 3.8 **Importing**

### 3.8.1 **Import guest details from a website or application**

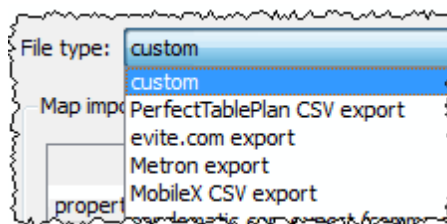
PerfectTablePlan can import guest details from a wide range of websites and applications, including:

- event registration websites (e.g. eventbrite.com)

- RSVP websites (e.g. evite.com and paperlesspost.com)
- wedding websites (e.g. theknot.com)
- CRM systems (e.g. Microsoft Dynamics)
- databases (e.g. Microsoft Access)

You just need to export the data from the website as an Excel .xls/.xlsx file or in text delimited form (e.g. rows separated by carriage returns and columns separated by tabs, spaces or commas) - CSV (comma separated value) is usually the easiest. Then you can [import it into PerfectTablePlan](#).

We have already set-up a number of commonly used import mappings for you in the [Import Data window](#):



#### [Advanced and Professional editions only](#)

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.

Note We are not able to offer any support for third party websites or software. Use of third party software is entirely at your own risk.

See also:

- [Example import formats](#)
- [Import non-English characters](#)
- [Import guests tutorial](#)

### 3.8.2 Import guest details from Apple Address Book

Apple AddressBook is not available on Windows.

### 3.8.3 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](#).

See also:

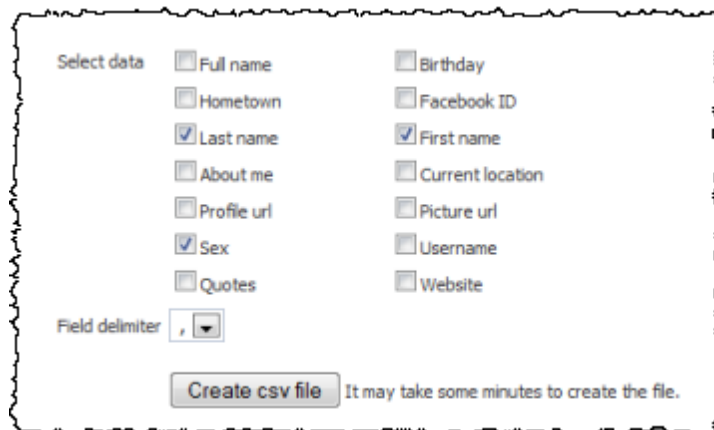
- [Importing](#)
- [Import guests tutorial](#)

### 3.8.4 Import guest details from Facebook

To import your guest details from Facebook:

In Facebook:

1. Login to your [facebook.com](https://facebook.com) account.
2. Go to the [Friends to CSV application](#).
3. Check the boxes as shown below and click **Create CSV file**.



The screenshot shows a web interface for selecting data to export from Facebook. It features two columns of checkboxes under the heading "Select data". The first column includes "Full name", "Hometown", "Last name" (checked), "About me", "Profile url", "Sex" (checked), and "Quotes". The second column includes "Birthday", "Facebook ID", "First name" (checked), "Current location", "Picture url", "Username", and "Website". Below these columns is a "Field delimiter" dropdown menu set to a comma. At the bottom is a "Create csv file" button and a note: "It may take some minutes to create the file."

4. Save the .csv file created.

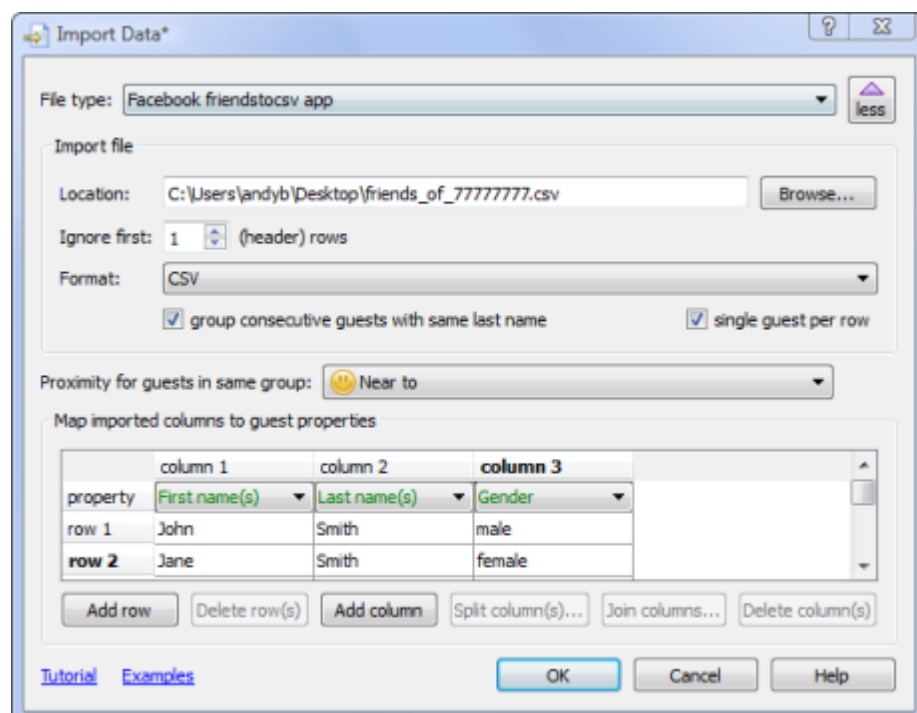
In PerfectTablePlan:

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

6. Select **Excel/CSV/text file** and click **OK**. A file open window will appear.

7. Select the .csv file. The **Import data** window will appear.

8. From **File type** select **Facebook friends to CSV app**.



9. Click **OK**.

Note We are not able to offer any support for third party software. Use of third party software is entirely at your own risk.

See also:



- [Importing](#)
- [Import guests tutorial](#)


### 3.8.5 Import guest details from Outlook

If you already have guest information in Microsoft Outlook™ you can import it, rather than re-typing it.

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

#### Method 1: Drag and drop

1. Start Microsoft Outlook (we can accept no liability for you installing or using third party software).
2. Select **Tools>Address book** to display the Outlook **Address Book** window.
3. Select one or more guests in the **Address Book** window.
4. Drag the guests to the PerfectTablePlan  **Guests** pane or  **Groups** pane.

Note You can easily rearrange guests into groups afterwards by dragging guests between groups in the PerfectTablePlan  **Groups** pane.

#### Method 2: Import CSV file

1. Start Microsoft Outlook (we can accept no liability for you installing or using third party software).
2. Select **File>Import and Export**. The **Import and Export Wizard** window will appear.
3. Select **Export to a file** and click the **Next** button.
4. Select **Comma separated values (Windows)** and click the **Next** button.
5. Select **Contacts** and click the **Next** button.
6. Choose a name and location for the exported file e.g. outlook.csv and click the **Next** button.
7. Click **Finish**.
8. Start PerfectTablePlan.

9. Select **File>Import**, select **text/CSV file** and click **OK**. An **Open** window will appear.
10. Navigate to the Outlook export file and click the **Open** button. The **Import Data** window will appear
11. In the table select **First name(s)** in the drop-down for the column with the first name and **Last name(s)** in the drop-down for the column with the last name. You can also choose other guest properties as appropriate.

Map imported columns to guest properties

	column 1	column 2
property	First name(s)	Last name(s)
row 1	John	Smith
row 2	Jane	Smith
row 3	Albert	Brown
row 4	Cynthia	Brown

12. Edit the text in the preview as appropriate.
13. Click the **OK** button. The guests will now be added to the plan.

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

1. Have a groups column in your spreadsheet.
2. Use the same name in the group column for each person in the couple, family or group.
3. Make this column the **Group** field during import.

Map imported columns to guest properties

	column 1	column 2	column 3
property	First name(s)	Last name(s)	Group
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

These guests will then be placed in the same group with the proximity you have

selected in the **Proximity for guests in same group** drop-down list. You can easily change the proximity by right clicking on the group and selecting the appropriate proximity later.

For more information see  [Import Data window](#) and Microsoft Outlook™ documentation. See also:



- [Importing](#)
- [Example import formats](#)
- [Import guests tutorial](#)


### 3.8.6 Import guest details from Outlook Express

If you already have guest information in Microsoft Outlook Express™ you can import it, rather than re-typing it.

Note The user interface of Outlook Express may differ between different versions.

#### Method 1: Drag and drop

1. Start Microsoft Outlook Express (we can accept no liability for you installing or using third party software).
2. Select **Tools>Address book** to display the Outlook Express **Address Book** window.
3. Select one or more guests in the **Address Book** window.
4. Drag the guests to the PerfectTablePlan  **Guests** pane or  **Groups** pane.

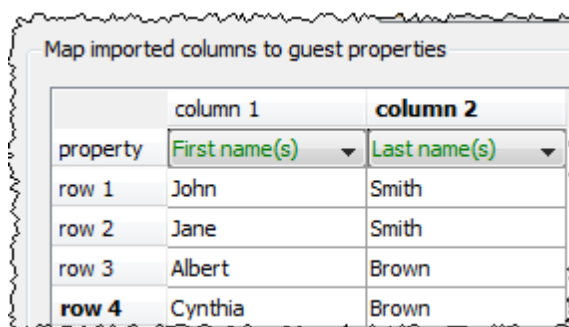
Note You can easily rearrange guests into groups afterwards by dragging guests between groups in the PerfectTablePlan  **Groups** pane.

#### Method 2: Import CSV file

1. Start Microsoft Outlook Express (we can accept no liability for you installing or using third party software).
2. Select **File>Export>Address book**. The **Address Book Export Tool** window

will appear.

3. Select **Text file (Comma Separated Values)** and click on the **Export** button. The **CSV Export** window will appear.
4. Choose a sensible name and location for the export file and click the **Next** button.
5. Check all the fields you wish to export. This should include **First Name** and **Last Name**.
6. Click the **Finish** button.
7. Click the **OK** button.
8. Start PerfectTablePlan.
9. Select **File>Import**, select **text/CSV file** and click **OK**. An **Open** window will appear.
10. Navigate to the Outlook Express export file and click the **Open** button. The **Import Data** window will appear.
11. In the table select **First name(s)** in the drop-down for the column with the first name and **Last name(s)** in the drop-down for the column with the last name. You can also choose other guest properties as appropriate.



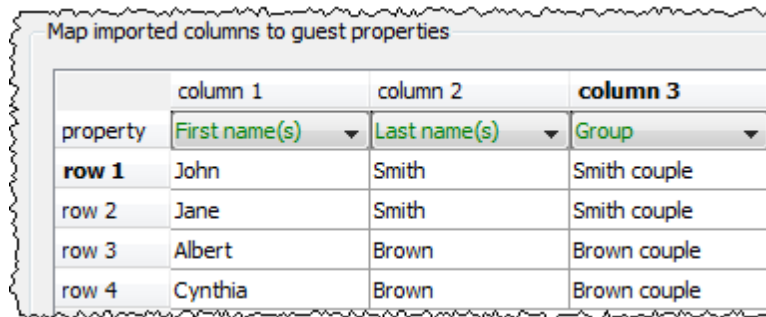
	column 1	column 2
property	First name(s) ▼	Last name(s) ▼
row 1	John	Smith
row 2	Jane	Smith
row 3	Albert	Brown
row 4	Cynthia	Brown

12. Edit the text in the preview as appropriate. Use the **Add row** and **Delete row** buttons to add and remove rows.
13. Click the **OK** button. The guests will now be added to the plan.

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



- Have a groups column in your spreadsheet.
- Use the same name in the group column for each person in the couple, family or group.
- Make this column the **Group** field during import.



	column 1	column 2	column 3
property	First name(s) ▼	Last name(s) ▼	Group ▼
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

These guests will then be placed in the same group with the proximity you have selected in the **Proximity for guests in same group** drop-down list. You can easily change the proximity by right clicking on the group and selecting the appropriate proximity later.

For more information see [Import Data window](#) and Microsoft Outlook™ Express documentation.

See also:

- [Importing](#)
- [Example import formats](#)
- [Import guests tutorial](#)

### 3.8.7 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](#).

Map imported columns to guest properties

	column 1	column 2	column 3
property	First name(s)	Last name(s)	Group
row 1	John	Smith	Smith couple
row 2	Jane	Smith	Smith couple
row 3	Albert	Brown	Brown couple
row 4	Cynthia	Brown	Brown couple

See also:

- [Importing](#)
- [Import proximity data](#)
- [Example import formats](#)
- [Import guests tutorial](#)

### 3.8.8 Import non-English characters

If your guest data contains non-ASCII characters (e.g. Chinese or Russian characters) you need to save it in a form that supports Unicode (UTF-8 or UTF-16) characters. E.g. save it from Excel as **Unicode Text** rather than **CSV (Comma delimited)**. PerfectTablePlan should then be able to import it.

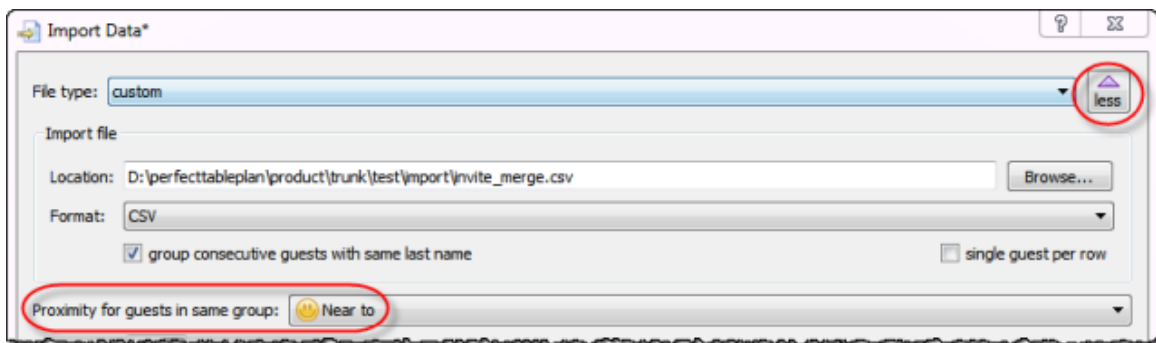
If you get really stuck on this, [contact support](#).

See also:

- [Add a special character not on my keyboard](#)

### 3.8.9 Import proximity data

You can set the proximity for guests [imported in groups](#).



### Professional edition only

To import proximity data by guest:

1. Select **File** > **Import**.
2. Choose **Excel/CSV/text file**.
3. Click **OK**.
4. Select a file to import. The **Import Data** window will appear.
5. Set guest name and other columns as usual.
6. Set the **Next to**, **Near to**, **Not next to** and/or **Not near to** columns.
7. Click **OK**.


Map imported columns to guest properties

	column 1	column 2	column 3	column 4	column 5	column 6
property	Full name(s)	ID	Group	Next to	Near to	Not next to
row 1	John Smith		00001 Smith	Jane Smith, Bill Brown		
row 2	Jane Smith		00002 Smith			00004
row 3	Bill Brown		00003 Brown	Jenny Brown		Jones
row 4	Jenny Brown		00004 Brown			
row 5	William Jones		00005 Jones	Claire Jones		
row 6	Claire Jones		00006 Jones			

Note:

- Guests referenced during proximity import must already exist in the plan

or be created during the import (i.e. have their own row).

- Each cell in a **Next to**, **Near to**, **Not next to** or **Not near to** column can contain 0 or more guest IDs, guest display names, guest first + last names or group names. If there is more than 1, they need to be separated by commas (,).
- When cross referencing proximities against guests PerfectTablePlan will match in the following order:
  - cross reference=guest ID
  - cross reference=guest display name
  - cross reference=group name
  - guest first and last name contained in cross reference
- If no case sensitive match can be found, then case insensitive matches will be looked for.
- If you set guest A 'next to' guest B, then guest B 'next to' guest A will be set automatically.
- These proximities override the default proximity for members of a group.
- If you have problems you can  **Edit>Undo** the import and try again.


See also:

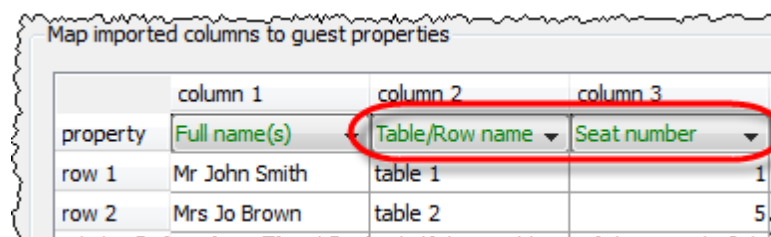
- [Importing](#)
- [Example import formats](#)
- [Import guests tutorial](#)

### 3.8.10 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).
- The case of table names and custom seat names is ignored during import.
- If the table cell is left blank the guest will not be assigned a seat.

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

 [Video with audio \(0:25 minutes\)](#)

See also:

- [Importing](#)
- [Example import formats](#)
- [Import guests tutorial](#)

## 3.9 Plans

### 3.9.1 Close the current plan

To close the current plan and open an existing plan: select **File>Open...** or **File>Open Recent...** .

To close the current plan and open a new, empty plan: select **File>New** .

### 3.9.2 Create a re-useable template plan

To create a template plan that you can re-use for similar events:

1. Create the plan that you want to be the template.
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. Modify the plan for the new event.
4. **File>Save**.

[Advanced and Professional editions only](#)

1. Create the plan that you want to be the template.
2. **File>Save As Template** to a new template file, e.g. 'template.tpt'.

Each time you need to create a new plan based on the template:



1. **File>Open** the template plan you created.
2. Modify the plan for the new event.
3. **File>Save**.

See also:

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

### 3.9.3 Email my plan

To email a copy of your plan to someone with PerfectTablePlan:

1. **File>** **Save** your plan.
2. Select **File>** **Email Plan**. Your normal email program should now appear.
3. Send the email.

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](#) (usually [PDF](#)).
2. Compose an email and add the exported file as an attachment.

#### 3.9.4 Find a missing plan file

If you are having difficulty remembering where you stored a file, you can search your haddisk using the [Find plan files window](#).

Note PerfectTablePlan never deletes plan files.

See also:

- [Most Recently Accessed window](#)
- [Backup files](#)

#### 3.9.5 Retrieve old versions of the plan

You may be able to access old versions of your plan from automatic [backup files](#) made by PerfectTablePlan.

### 3.10 Printing

#### 3.10.1 Change the printer or paper size

PerfectTablePlan can print to any size of paper that your printer supports. To change the paper size select **File>Page Setup...** or click on the **Setup...** button in the **Print** window.

If you have more than one printer you can change printer by clicking the **Setup...** button in the **Print** window.


See also:

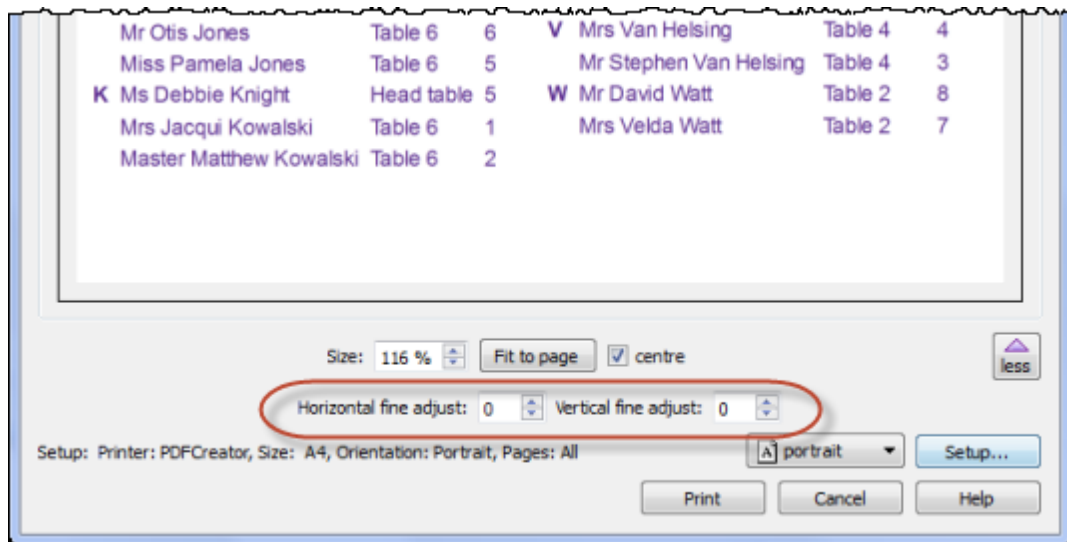
- [Print window](#)
- [Page Setup window](#)
- [Print Setup window](#)






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

### 3.10.2 Change the print pagination

To change the print pagination use the fine adjust controls in the **Print** window. Click on the  button to show them.





Note that you can also export the contents of the  **Guest Chart**,  **Table Chart** or  **Report** pane [to Microsoft Excel or Word](#) or similar applications and print them from there.



See also:

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

### 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 for lots of guests 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 number** 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. If the name of a guest can't be fitted into the space available in the  **Floor Plan** or  **Table Plan** pane, the font will automatically be scaled smaller for that name to try to make it fit.
- Shorten the names displayed in the  **Floor Plan** pane, e.g. by selecting **F. Last.** from the **Guests** drop-down list at the top of the pane. This will allow you to increase the font size.

#### [Advanced and Professional editions only](#)

- For an E-shaped table you can increase the distance between the 'legs' by making the 'top' sprig longer. This will give more space for names

between the leg sprigs if you are displaying them as **Name only (radial)** or **Name only (banquet)**.

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.
- [Display the plan on a VDU or plasma screen](#).

### 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](#).


See also:

- [Display seating on a VDU or plasma screen](#)
- [Print legible plans on a small format printer](#)


## 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/*Ctrl*+click/*Shift*+click to select the appropriate guests in the  **Guests** pane.
2. Right click.
3. Select the proximity from the pop-up menu.

Professional edition only

To edit 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. Click on the **Bulk Edit...** button. The [Bulk Edit Proximity window](#) will be displayed.
3. Set the drop-down list according to the changes you want to make.
4. Click **OK**.




 [Video with audio \(1:08 minutes\)](#)

See also:

- [Import proximity](#)

### 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](#)

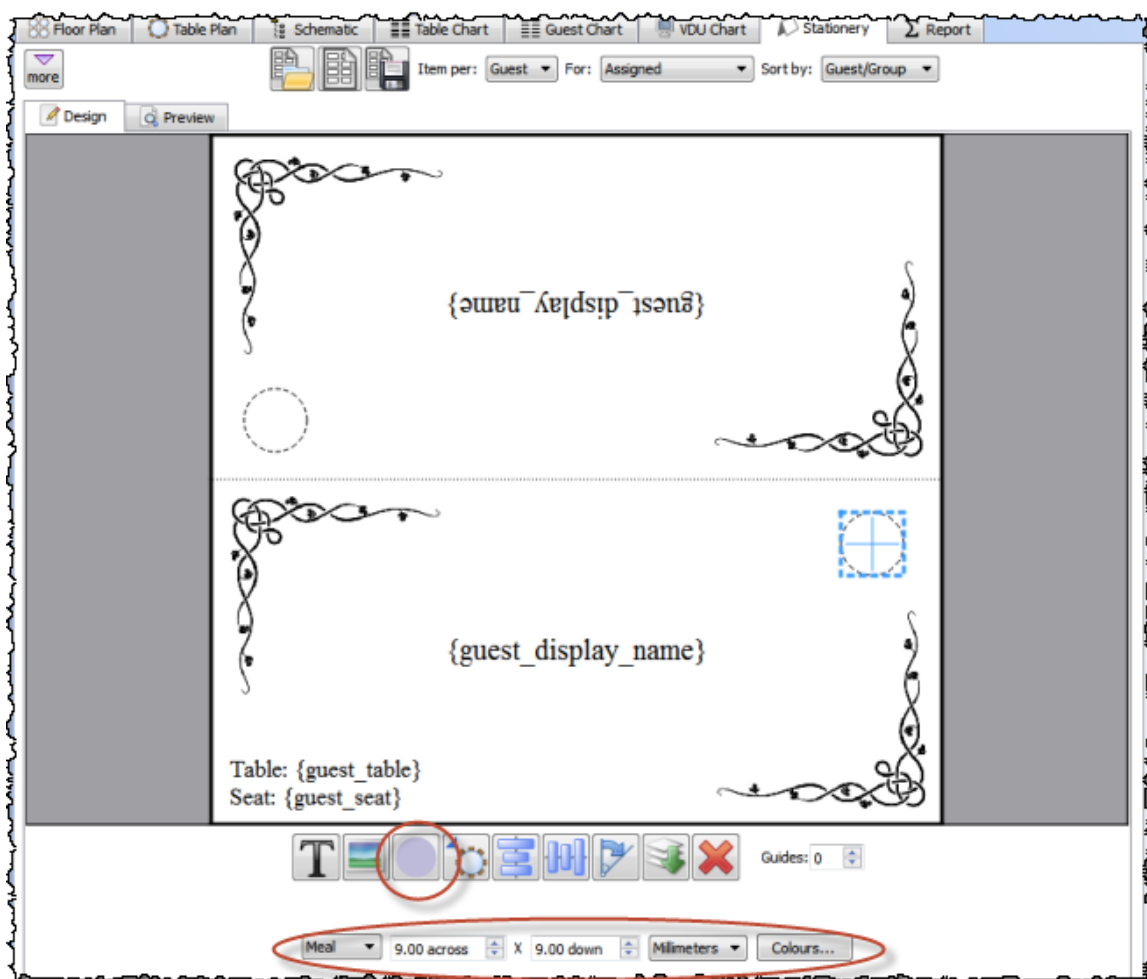
## 3.12 Stationery

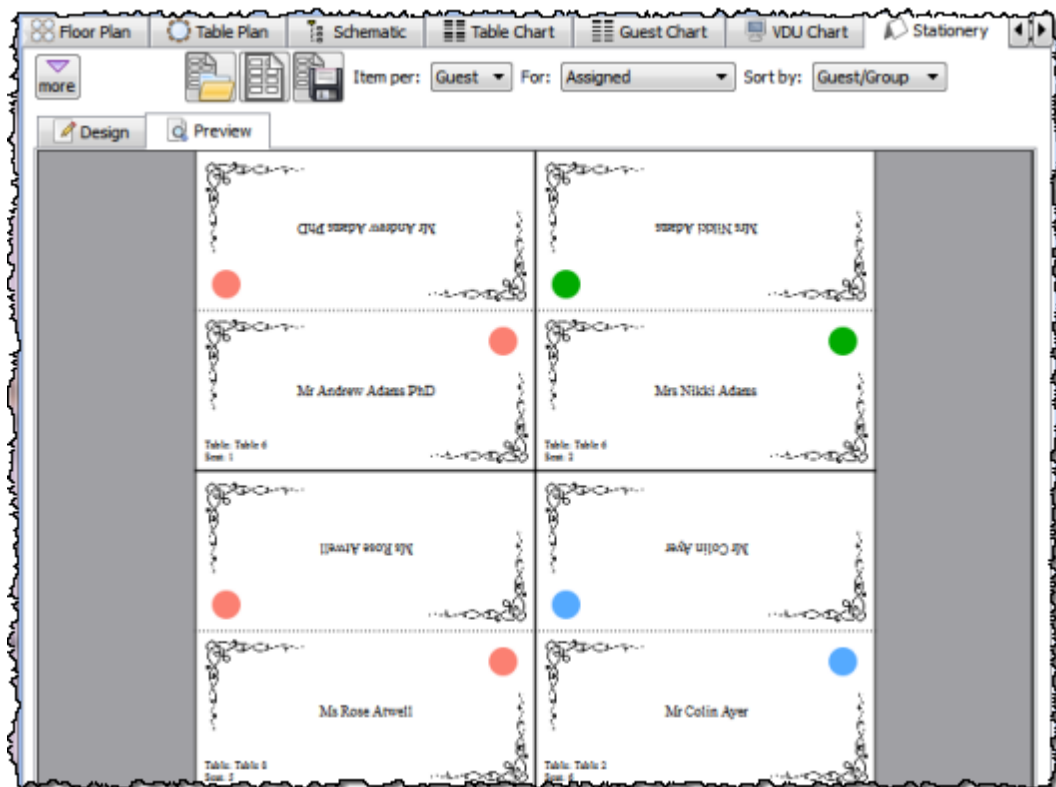
### 3.12.1 Add a colour coded spot to the stationery


Colour coded spots can be a useful way to convey information on stationery. For example you can put colour coded spots on place cards to tell the serving staff what meal has been ordered (e.g. red=beef, blue=chicken, green=vegetarian). You can also use it to discretely convey information you might not wish to put in text form, e.g. whether a guest has paid!

To add colour coded spots to your stationery:


1. Ensure that the  **Design** tab of the  **Stationery** pane is at the front and the **Item per** drop-down list is set to **Guest**.
2. Click on the  **Insert Colour spot** button at the bottom of the  **Stationery** pane.
3. Click the cross hair cursor where you want to place the centre of the colour spot.
4. Click on the drop-down list to choose which guest property you wish to represent (Gender, Group, Meal or [custom field](#) of type Yes/No, Selection or Tags).
5. Set the colour spot **across** and **down** size. Note that this is a bounding area and the colour spots may not fill all of it. If you expect to have to have multiple colour spots (e.g. because you have multiple meal selections) you may need to set a rectangular (rather than square) bounding area.
6. Click on the  **Preview** tab of the  **Stationery** pane to see how the spots will appear when merged.





You can click on the **Colours...** button to change the colours used in the  [Visualization colours window](#).

The number of colour spots varies. E.g. If you are using colour spots to represent meal selection or custom fields of type Tags, a colour spot will be displayed for each comma separated value. So if the meal choice is listed as "soup,fish,ice cream" then 3 colour spots will be displayed.

Colour coded spots are not shown in  **Preview** tab or in print outs if the **Item per** drop-down list is set to **Group** or **Table**.








 [Video with audio \(1:39 minutes\)](#)

See also:

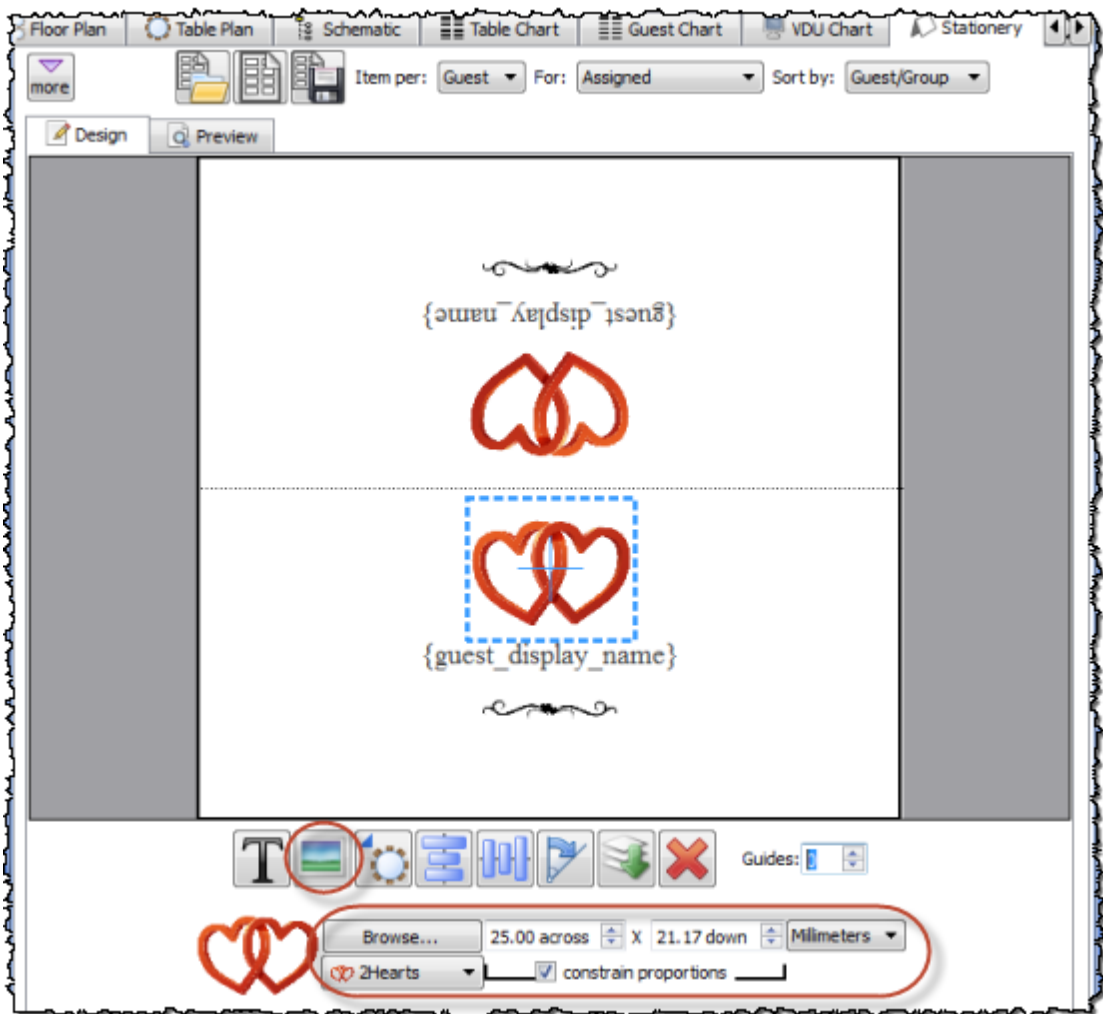
- [Print stationery tutorial](#)
- [Add a graphic/image/clipart to the stationery](#)
- [Add a personalised map to the stationery](#)
- [Merge guest names into stationery](#)

### 3.12.2 Add a graphic/image/clipart to the stationery

To add an image to your stationery:


1. Ensure that the  **Design** tab of the  **Stationery** pane is at the front.
2. Click on the  **Insert Image** button at the bottom of the  **Stationery** pane.
3. Click the cross hair cursor where you want to place the centre of the image.
4. Click on the **Browse...** button and select an image file (or select from the drop-down list if the image has been added previously).
5. Set the image **across** and **down** size.
6. Click  **Rotate** to rotate the image as required.
7. Click on the  **Preview** tab of the  **Stationery** pane to see how the images will appear when merged.





 [Video with audio \(1:39 minutes\)](#)

### [Advanced and Professional editions only](#)

You can use the  **You are here** button to [insert a personalised location map](#) into each item of stationery.


See also:

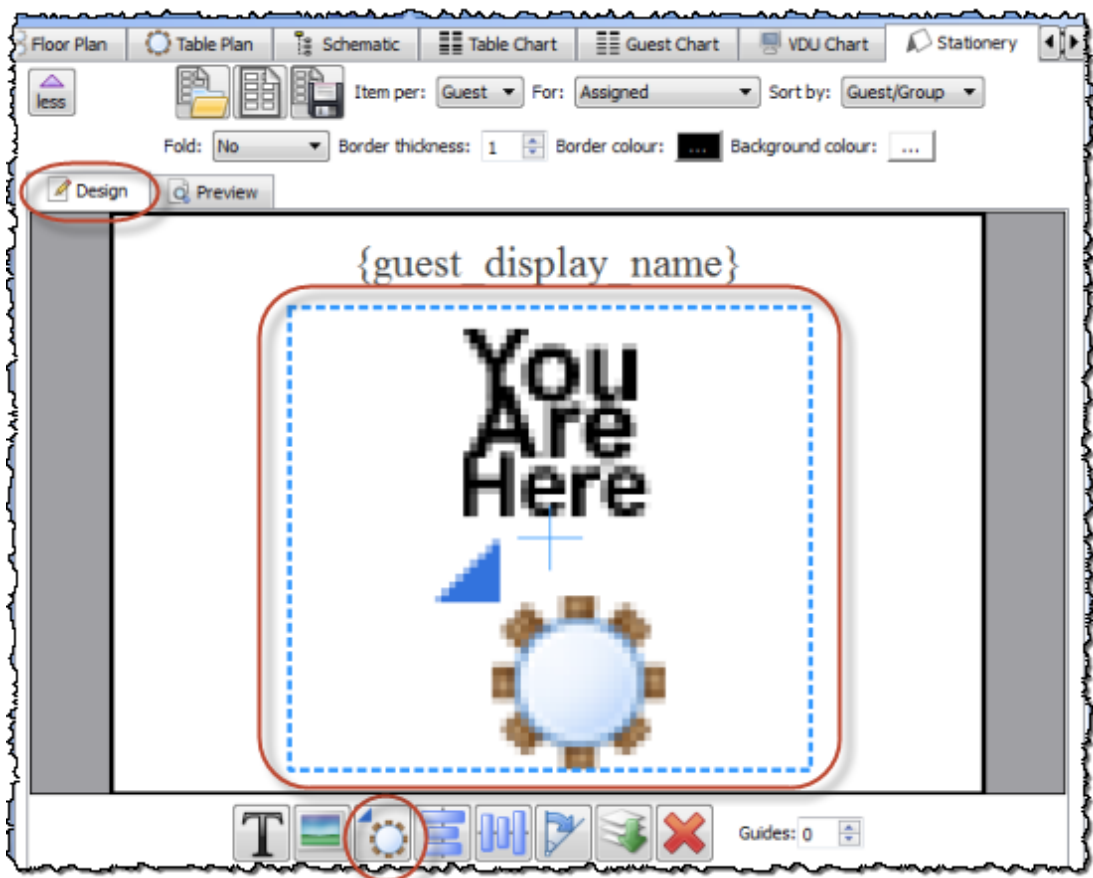
- [Find free clipart](#)
- [Load sample stationery](#)

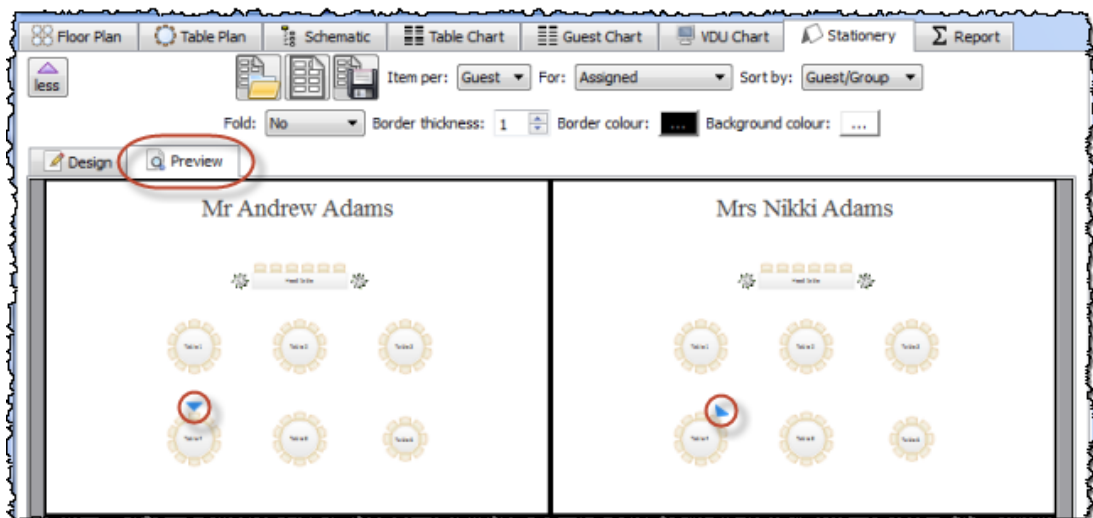
- [Print stationery tutorial](#)
- [Add a personalised map to the stationery](#)
- [Add a colour coded spot to the stationery](#)
- [Merge guest names into stationery](#)

### 3.12.3 Add a personalised map to the stationery

#### [Advanced and Professional editions only](#)

You can use the  **You are here** button to add a personalised map image into each item of stationery. This map will show the appropriate seat, seats or table, depending on whether the **Item per** drop-down list is set to **Guest**, **Group** or **Table**.





You may need to make the 'You are here' image quite large for it to be legible, especially if you have lots of tables.

To add a 'You are here' image in the **Stationery** pane:

1. Ensure that the **Design** tab is at the front.
2. Click on the **You are here** button at the bottom of the **Stationery** pane.
3. Click the cross hair cursor where you want to place the centre of the image.
4. Set the image **across** and **down** size.
5. Click **Rotate** to rotate the image as required.
6. Click on the **Preview** tab of the **Stationery** pane to see how the images will appear when merged.

[Video with audio \(0:49 minutes\)](#)




See also:

- [Print stationery tutorial](#)

- [Add a graphic/image/clipart to the stationery](#)
- [Add a colour coded spot to the stationery](#)
- [Merge guest names into stationery](#)

#### 3.12.4 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.



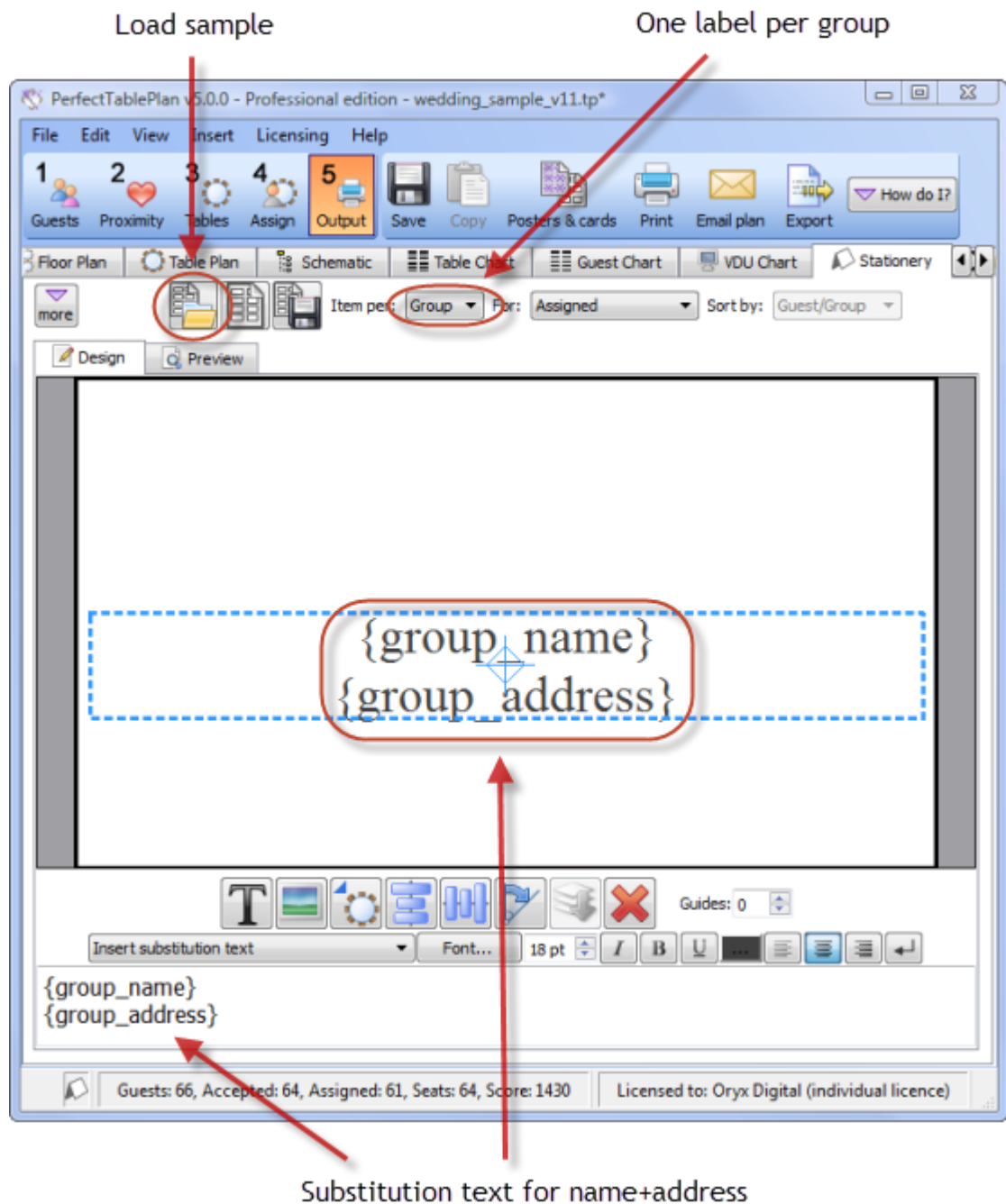
2. Set the various fields to the appropriate dimensions. You can choose **mm** or **inches**. Click on the **Nomenclature** tab for a visual representation of the various parameters. The layout is shown in the **Preview** tab.
3. Click **OK**. The **Save Stationery Layout** window will appear.
4. Complete the details for the new layout and click **OK** if you want it to be saved into the stationery database for next time.

See also:

- [Load sample stationery](#)
- [Show one stationery item per couple/family/group](#)

#### 3.12.5 Create address labels

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



See also:

- [Load sample stationery](#)
- [Print stationery tutorial](#)
- [Merge guest names into stationery](#)
- [Show one stationery item per couple](#)

### 3.12.6 Load sample stationery

Some sample stationery templates (both A4 and letter sized) are installed with PerfectTablePlan. To load a sample click on the **Load stationery** button at the top of the **Stationery** pane.



The samples are usually installed into Documents\PerfectTablePlan.






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

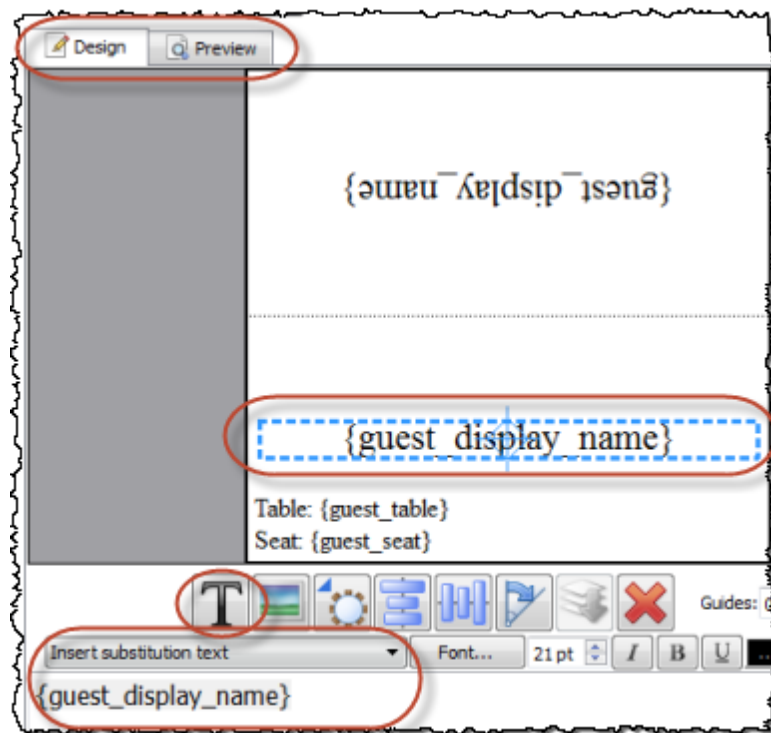
See also:

- [Add a new stationery layout](#)

### 3.12.7 Merge guest names into stationery

You can easily merge guest names (and other data from your table plan) into place cards and other stationery.

1. Go to the  **Design** tab of the  **Stationery** pane.
2. Click on the  **Insert text** button and then click on the location you want to merge the text into.
3. Select [the text you want to merge](#) from the **Insert substitution text** drop-down list.
4. Click on the  **Preview** tab of the  **Stationery** pane to see the text merged.



See also:

- [Load sample stationery](#)
- [Print stationery tutorial](#)
- [Order place cards](#)
- [Add a graphic/image/clipart to the stationery](#)
- [Add a colour coded spot to the stationery](#)
- [Add a personalised map to the stationery](#)
- [Show one stationery item per couple/family/group](#)


### 3.12.8 Order place cards

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

See also:

- [Print stationery on press-out sheets](#)

### 3.12.9 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 if you want someone else to print it for you.



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

Note that PerfectTablePlan is not a fully fledged wordprocessor/DTP package. If your stationery includes lots of text and/or graphics you might be better [exporting](#) all the data into a .csv file and then importing it into a wordprocessing/DTP package, such as Microsoft Word.

See also:



- [Merge guest names into stationery](#)
- [Order place cards](#)
- [Printing stationery](#)
- [Create address labels](#)
- [Show one stationery item per couple/family/group](#)

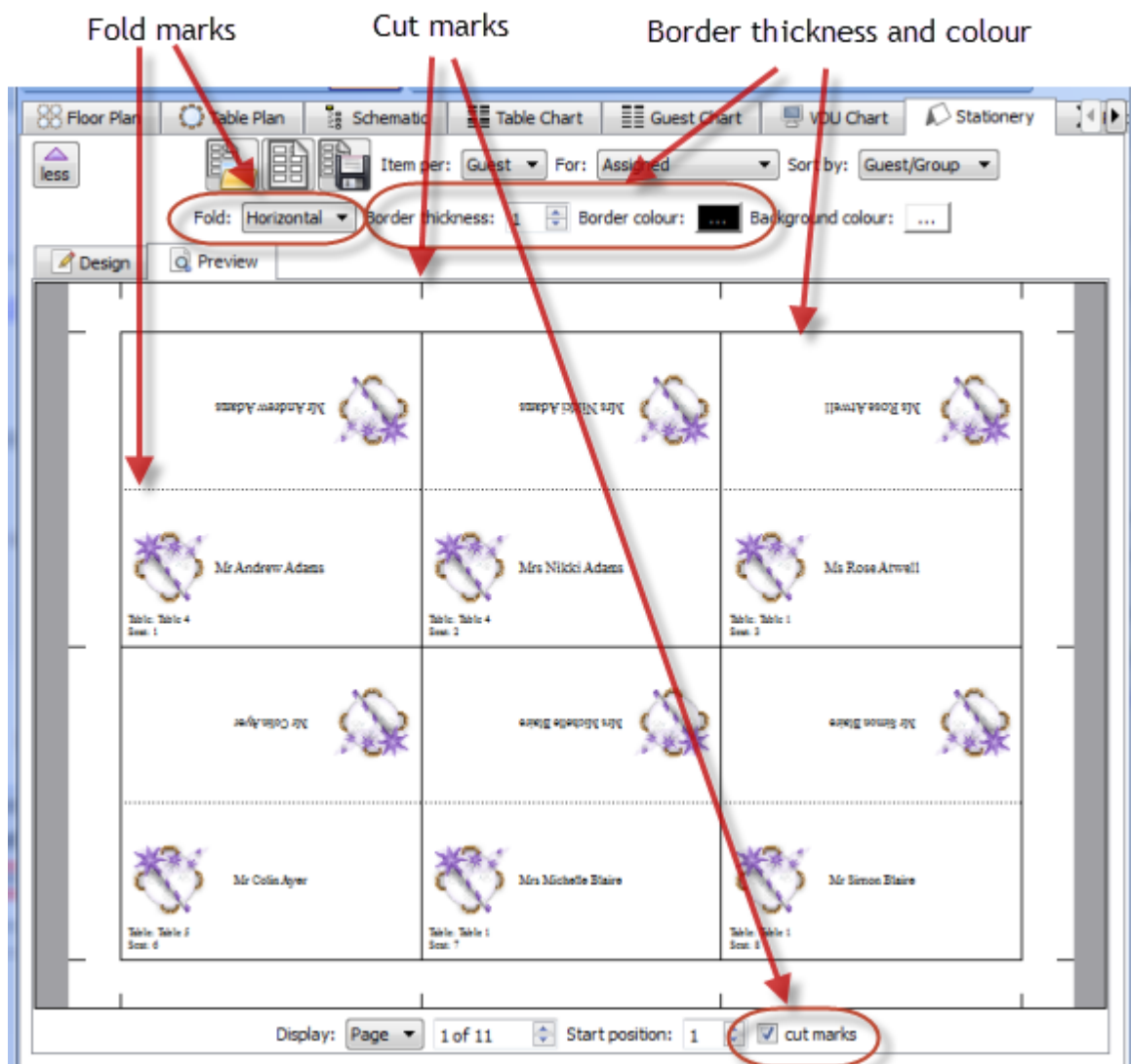
### 3.12.10 Print stationery on blank sheets

1. At the top of the  **Stationery pane** click the  **Stationery layout** button and [set-up the dimensions and layout of your stationery](#).
2. [Design your stationery](#).
3. The stationery will be easier to fold and cut if you use fold lines, borderlines and/or cut lines. For the best results we recommend you use **cut marks** and a



guillotine:

- Click on the  button at the top left of the pane and optionally set the **Fold**, **Border thickness** and **Border colour** options.
  - Click on the **Preview** tab and optionally check the **cut marks** check box.
4. Once you are happy with your design select **File>Print**.







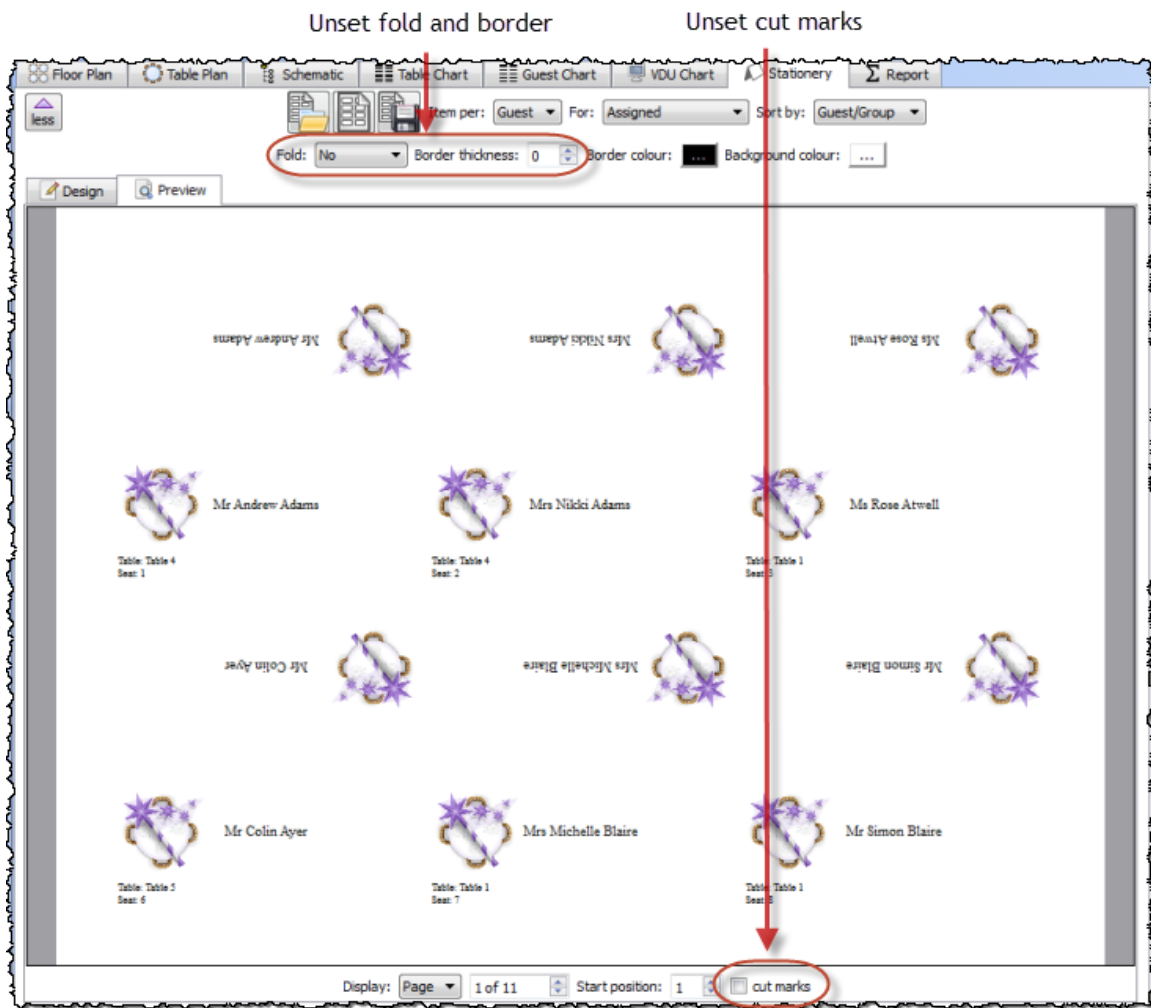
See also:

- [Print stationery on press-out sheets](#)
- [Remove a stationery border or fold line](#)

- [Merge guest names into stationery](#)
- [Show one stationery item per couple/family/group](#)

### 3.12.11 **Print stationery on press-out sheets**


1. At the top of the  **Stationery** pane click the  **Stationery layout** button and [set-up the dimensions and layout of your stationery](#).
2. [Design your stationery](#).
3. If you are using pre-scored press-out sheets you shouldn't need to print fold lines, borders or cut-marks:
  - Click on the  button at the top left of the pane and optionally set the **Fold**, **Border thickness** and **Border colour** options.
  - Click on the **Preview** tab and uncheck the **cut marks** check box.
4. Once you are happy with your design select **File>**  **Print**.



See also:

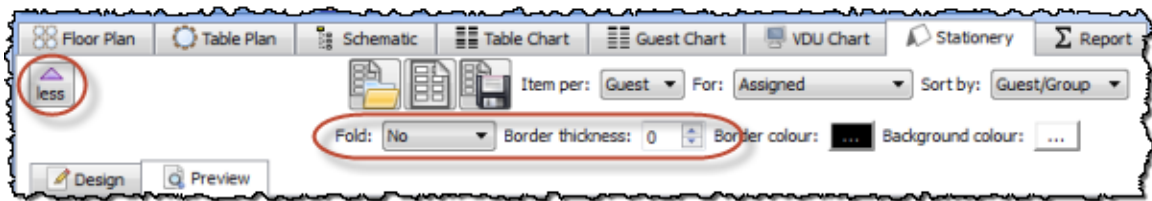
- [Print stationery on blank sheets](#)
- [Remove a stationery border or fold line](#)
- [Merge guest names into stationery](#)
- [Order place cards](#)
- [Show one stationery item per couple/family/group](#)

### 3.12.12 Remove a stationery border or foldline

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

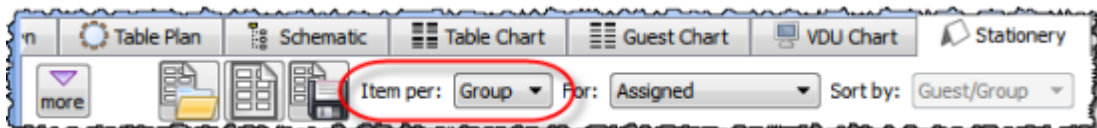
- To remove the border from stationery set the **Border thickness** to **0**.

- To remove the fold lines from stationery set **Fold** to **No**.



### 3.12.13 Show one stationery item per couple/family/group

For some types of stationery (e.g. invitations or escort cards) it may be appropriate to only print one item of stationery per couple/family/group. You can do this by setting the **Item per** drop-down list at the top of the [Stationery pane](#) to **Group**.



Note {group\_members} will show either the first name (e.g. Mr & Mrs John Smith) or initials (e.g. Mr & Mrs John Smith) depending on the setting of the **Display group members as** field in the **Names** tab of the [Preferences window](#).

## 3.13 Tables

### 3.13.1 Add a single seat to a rectangular/banquet table




If you want to add a single extra seat to a rectangular or banquet table you need to first convert it to a [custom table](#). You can then separately control how many seats there are on each of the 4 sides.

See also:

- [Change table size or shape](#)

### 3.13.2 Change table size or shape

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

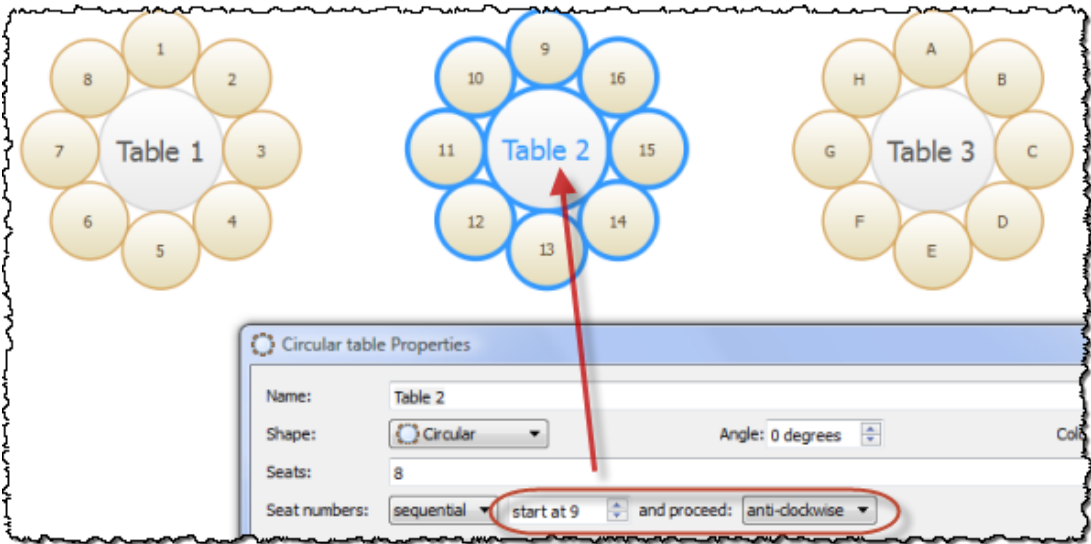
1. Double-click on the table in the  Floor Plan,  Table Plan or  Schematic pane. The [Table properties window](#) will appear.
2. Change the **Size** or **Shape** fields, as required.
3. Click **OK**.

See also:

- [Add a single seat to a rectangular/banquet table](#)

### 3.13.3 Change the seat numbering


[Advanced and Professional editions only](#)



The diagram illustrates three circular tables. Table 1 has seats numbered 1 through 8. Table 2 has seats numbered 9 through 16. Table 3 has seats labeled A through H. A red arrow points from the 'start at 9' field in the 'Circular table Properties' window to the seat number 9 on Table 2.

**Circular table Properties**

Name: Table 2

Shape:  Circular Angle: 0 degrees

Seats: 8

Seat numbers: sequential start at 9 and proceed: anti-clockwise

To change the seat numbering:

1. Double click on a table or row of seats to show the [Table properties window](#).
2. Either:
  - Set the **Seat numbers** to **sequential** to change the number of the first seat and whether the seats are ordered clockwise or anti-clockwise; or




- Set **Seat numbers** to **custom** to change them to anything you like (including letters or names) in the [Custom seat numbering window](#) (click the **Change...** button if **custom** is already set).





 [Video with audio \(0:51 minutes\)](#)

See also:






- [Show seat numbering](#)

#### 3.13.4 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**.

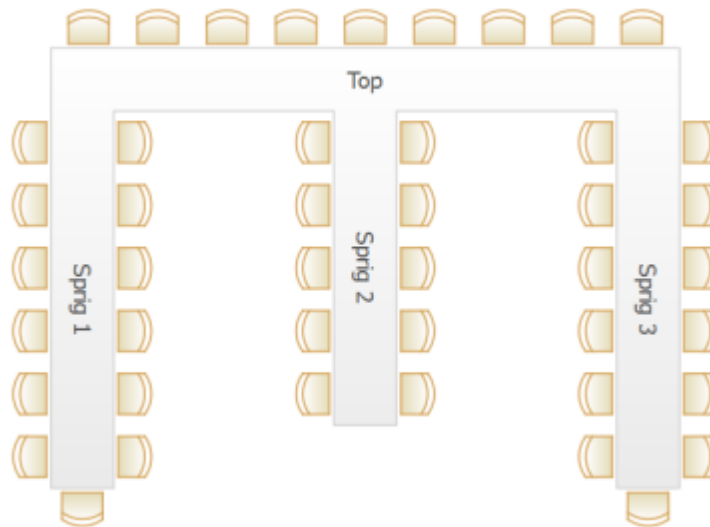
See also:

- [Table Order window](#)

### 3.13.5 Create an E-shaped table

#### [Advanced and Professional editions only](#)

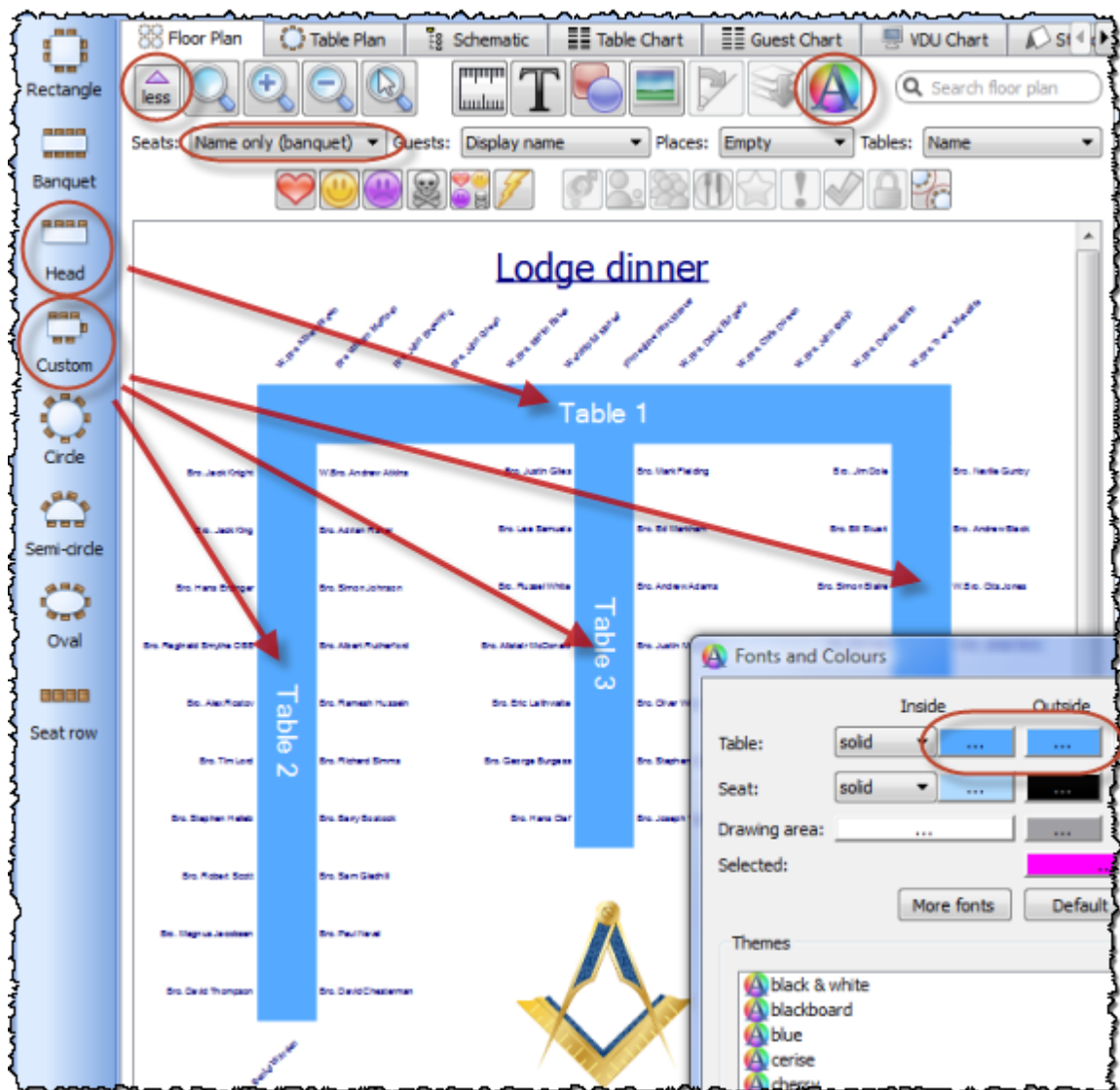
You can add an E-shaped table by selecting **Insert>E-shaped Table...**



 [Video with audio \(3:39 minutes\)](#)

If you have PerfectTablePlan [Home edition](#) you can create an E-shaped table (and other complex table types) by composing it from basic table 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\_Home\_edition' 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.

#### 3.13.6 Create rectangular tables with seats on 1,2 or 3 sides

- For a rectangular table with seats on 3 sides or a different number of seats on each side use a custom table.
- For a rectangular table with an equal number of seats on 2 sides use a banquet



table.

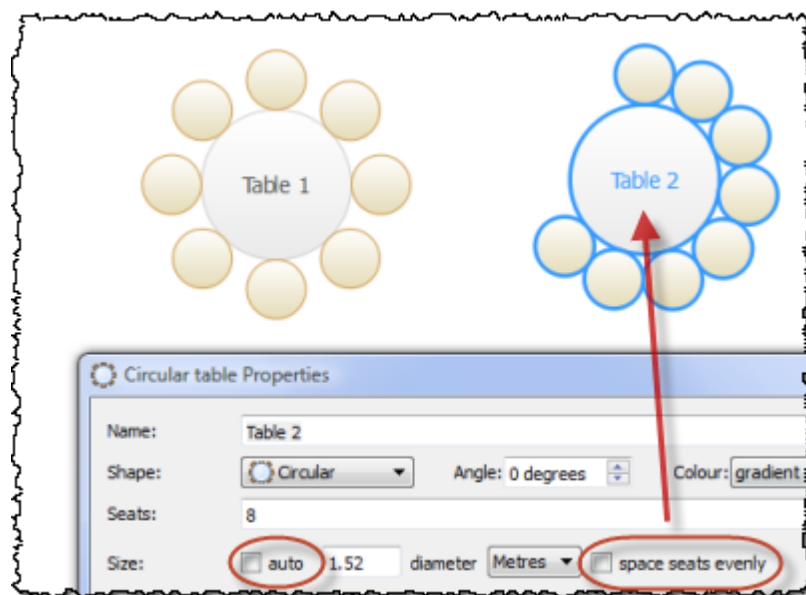
- For a rectangular table with seats on 1 side use a head table.

See also:

- [Create an E-shaped table](#)

### 3.13.7 Create sweetheart/cabaret style tables

If you have a circular table that is big enough to have gaps between the seats, you can choose to space the seats evenly or group them all together. The latter is useful if you want to use sweetheart or cabaret style seating. Note that grouping seats together is only possible for circular tables when there are gaps between the seats (there will be no gaps if **auto** is checked).




### 3.13.8 Handle sponsored tables

Corporate and charity events will often have tables sponsored by companies or individuals. One way to accommodate this is to:

1. Include the sponsor name in the table name, e.g. 'Table 1 (Acme Corp)'.
2. If a guest is associated with a particular sponsor, add a comment to the guest's **Notes** field. If you don't know the name of the sponsored guests you can set their last name to 'Acme guest 1', 'Acme guest 2' etc. (If you have PerfectTablePlan Advanced or Professional edition you can use a custom field

to record which sponsor each guest is associated with).

3. Select a host for each sponsored table and make them a **VIP** guest. Drag them to a seat on that table and **Edit>Guest Property>Locked>**  **Yes** them there.
4. Select a sponsor and all the groups you would like to sit with them by *Ctrl* +clicking the sponsor and the groups in the **Groups** pane. Set them to have proximity 'near to' using **Edit>Proximity**.
5. Run the automatic seat assignment **File>Auto assign seats**.
6. Use drag and drop and visualization to fine-tune the assignments.

#### Professional edition only

You can use a custom selection field to record which sponsor each guest is associated with and then set the proximity for that field so that all guests with the same sponsor sit together.





We don't recommend you group people by sponsor unless they have the same contact details (or you don't care about contact details).


See also:

- [Organize guests by company/organization](#)


### 3.13.9 Rename/renumber tables

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.

[Professional edition only](#)

You can use the  [Renumber/rename tables window](#) to quickly rename large numbers of tables in the  **Floor Plan** pane.

 [Video with audio \(0:44 minutes\)](#)

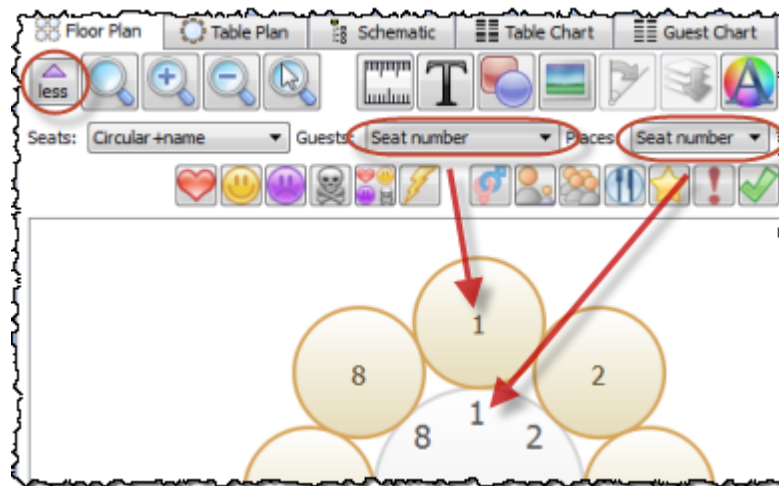
To change the default name given to new tables change the **New table name** format field in the **Names** tab of the  [Preferences window](#).

### 3.13.10 Show seat numbers

#### Floor plan pane

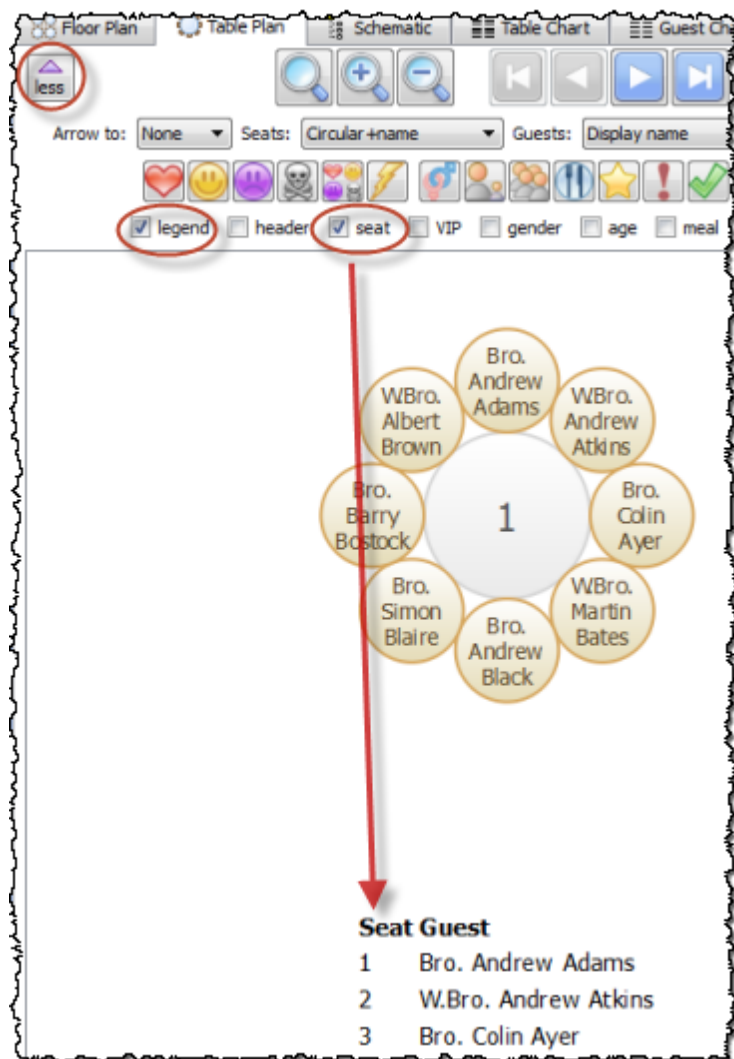
You can show seat numbers in place of guest names by selecting **Seat number** (small, medium or large) from the **Guests** drop-down list.

Alternatively, if you need to show both guest names and seat numbers, you can select **Seat number** from the **Places** drop-down list.



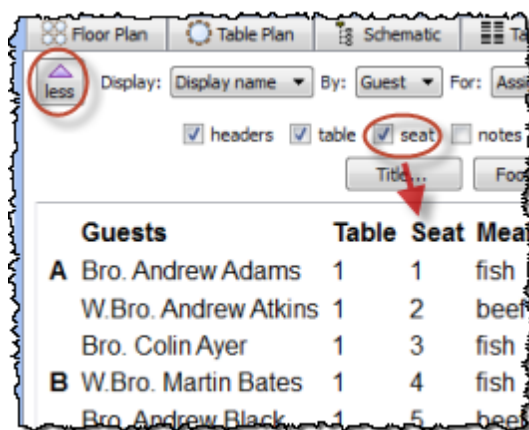
## Table plan pane

As per the **Floor plan** pane, above, but you can also show seat numbers in the legend by checking the **seat** check box.



## Guest chart pane

You can show seat numbers by checking the **seat** check box.



## Stationery pane

You can show seat numbers by using the {guest\_seat} [substitution text](#).

See also:

- [Change seat numbering](#)

### 3.14 Other

#### 3.14.1 Add a special character not on my keyboard

PerfectTablePlan supports a very wide range of symbols using Unicode, which is now the leading standard for encoding non-Latin character sets. However you need to have another Unicode compliant application to create the symbol and copy from. If you copy and paste from another application that isn't using Unicode (such as from **Insert>Symbol** in MSWord 2000) it may not work.

The simple way around this is to copy and paste the symbol from your web browser to PerfectTablePlan. For example copy the symbol from this page:






<http://www.htmlhelp.com/reference/html40/entities/symbols.html>



and paste it into PerfectTablePlan. We have tested this with recent versions of both IE and FireFox browsers and it works fine, but older AOL and Netscape browsers may have problems. Just be careful not to paste in unwanted characters (such as 'end of line' characters).

See also:

- [Import non-English characters](#)

#### 3.14.2 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.






**Note** If the name of a guest can't be fitted into the space available in the  **Floor Plan** or  **Table Plan** pane, the font will automatically be scaled smaller for that name to try to make it fit.

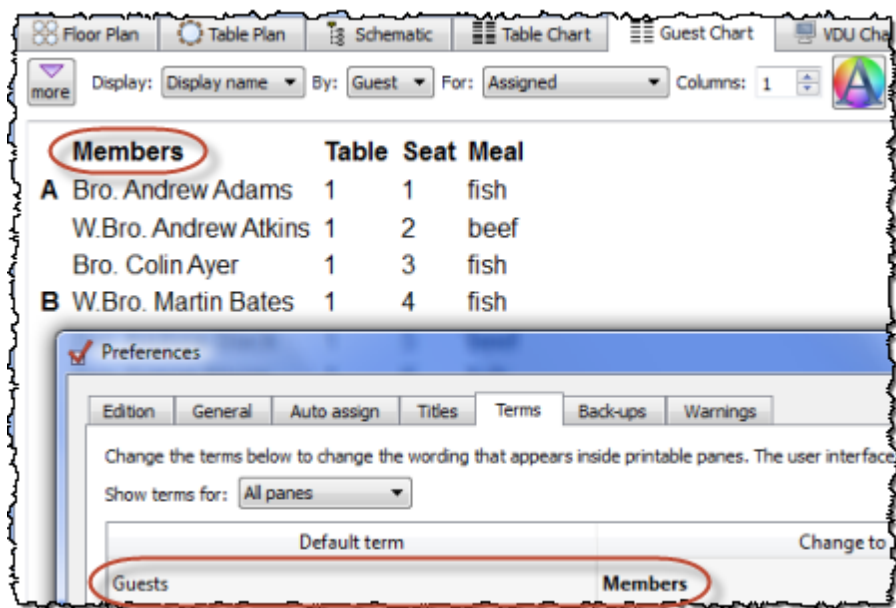
In the  **Stationery** pane select the appropriate text and click on the **Font** and **Colour** buttons at the bottom of the  **Design** tab.

See also:


- [Find free textures](#)
- [Visualization Colours window](#)

### 3.14.3 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.



### 3.14.4 Display seating on a VDU or plasma screen

You can display full screen scrolling text (like film credits) showing seat assignments in the  [VDU Chart pane](#). For example you might be able to connect the VDU output of a PC or Mac laptop to a plasma screen at a venue. We strongly recommend you test this before an event to ensure that your hardware/ software is compatible with the screen and you have the correct cable.

The chart below shows the (approximate) time taken for the display to scroll through a full cycle at a readable speed::

	Columns of guests displayed
--	-----------------------------

Seated guests	1	2	4
100	48 seconds	24 seconds	12 seconds
200	1 minute 36 seconds	48 seconds	24 seconds
500	4 minutes	2 minutes	1 minute
1000	8 minutes	4 minutes	2 minutes
2000	16 minutes	8 minutes	4 minutes



Anything over a minute may not be acceptable.

 [Video with audio \(2:17 minutes\)](#)

See also:

- [Assign \(or reassign\) seats in real time](#)

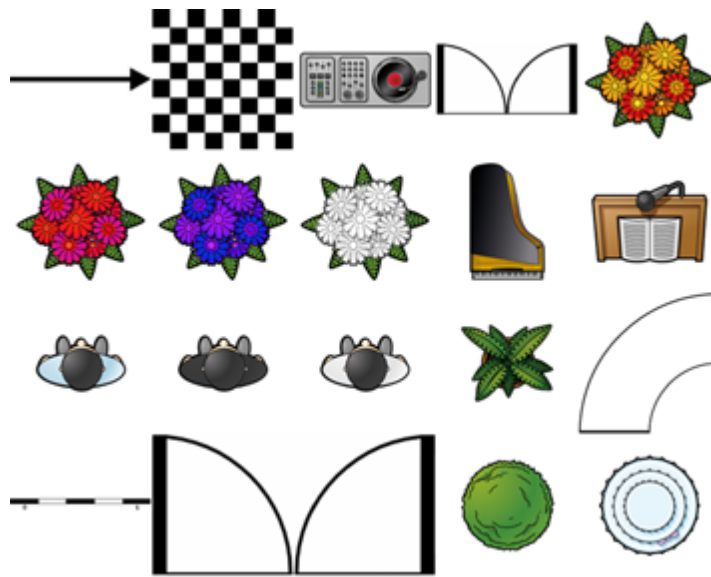
### 3.14.5 Estimate numbers and budget

Select **File** >  **Numbers and Budget...** and use the  [Numbers and Budget window](#) to estimate guest numbers and help keep track of your budget.

### 3.14.6 Find free clipart

We install a range of free floor plan, wedding, Masonic, decorative and PerfectTablePlan clipart with PerfectTablePlan. Usually this is installed into sub-folders of your `Documents/PerfectTablePlan/Clipart` folder.





floor plan clipart



wedding clipart



Masonic clipart



decorative clipart



PerfectTablePlan clipart

You can also use tools such as Google image search to find images.

Ideally the image should be in PNG format and should have at least 40 pixels for

each cm (100 pixels for each inch) that you want to print it at. E.g. If you want to display a crest 5 cm (2 inches) across on your printout, it should be at least 200 pixels across.

Storing large images in your plan will make your plan file large and may slow down PerfectTablePlan.

Make sure you comply with the copyright/licensing terms of any images you use. The licensing terms for our clipart are contained in a .txt file in each clipart sub-folder.


See also:

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

### 3.14.7 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 view your plan (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, meal choices and table shapes/sizes


You can print or export this information from the **Summary** report in the  $\Sigma$  **Report** pane (note that meal courses and special requirements will be totalled separately 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](#).

### [Professional edition only](#)



You can create a report of meal by table (and various other custom reports)

using the [Detailed \(summary\) report](#).

## General layout 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](#). Most people can read PDF and PNG format files.

## 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 are 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.

### 3.14.8 Select multiple items

In the  **Guests**,  **Groups** or  **Schematic** pane:

- To select multiple individual items *Ctrl*+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 *Ctrl*+click on the first item in each group and *Shift+Ctrl*+click.

To select multiple items in the  **Floor Plan** or  **Table plan** pane:

- Hold down the left mouse button and drag a 'rubber box' around the items you want to select; or
- *Ctrl*+click on each item.

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

Note You can edit a property for multiple guests by selecting **Edit>Guest** property.

## 4 Frequently asked questions

### 4.1 Frequently asked questions

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

## 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, print or scroll the VDU chart for plans with 30 or fewer guests.

To purchase a licence key go to [www.perfecttableplan.com](http://www.perfecttableplan.com) .

To fully activate the software select **Licensing>Licence** and enter the key into the  [Licence window](#).

If you purchased the software electronically off the Internet, the key will have been emailed to you.

If you purchased the software as a CD, the licence key will either be printed inside the box or will have been emailed to you.

To retrieve a licence you have previously purchased from [www.perfecttableplan.com](http://www.perfecttableplan.com) select **Licensing>Retrieve Key**.

Note A 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 1-4 licence keys are not valid for version 5. You can [upgrade to version 5 for a small fee](#).

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

### 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](mailto:sales@perfecttableplan.com) and we will attempt to fix them. Please include:

- a description of the bug
- your operating system (e.g. Windows 7)
- 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](mailto: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](mailto: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. v5.0.0 and v5.1.1 will both work with a v5 licence key). Major updates require a licence key upgrade (e.g. a v4 licence key will not work with version 5.0.0). 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.

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