PerfectTablePlan v7.1.0 for Mac

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Getting started

1 Getting started

1.1 Introduction

1.1.1 Introduction

PerfectTablePlan v7.1.0 for Mac

PerfectTablePlan helps you to quickly create table plans and seating charts for weddings, parties, banquets and events. It's a lot easier and faster 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 buy 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. Frequent users who have been using PerfectTablePlan for a while should read the Expert tips.

Note We have a separate version of this document for Windows. 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 ⌘+*G*, which means hold down the ⌘ Key and press the *G* key.

Hyperlinks are shown in conventional hyperlink format.

Underline is used for emphasis.

'Click' means clicking the left mouse button, unless stated otherwise. If you have a single button mouse you can simulate right-click by holding down the ⌘ key and clicking the left mouse button.

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1.1.3 System requirements

The minimum requirements for running this software are:

Processor	Operating systems
Intel	macOS 11.x to 15.x
ARM (M series)	macOS 11.x to 15.x

If your operating system is older or newer than the above check our website to find a compatible version of PerfectTablePlan.

If in doubt, try running an unlicensed trial version before you buy a licence.

1.1.4 The help system

Help is available in a number of different ways.

Context sensitive help

Context sensitive help provides detailed information on the use of each pane and window. To access context sensitive help press ⌘*?* or click on a ? button.This opens help in a separate window.

The Mac Help Viewer

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

Contents

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

Index

Displays the Help index.

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Search

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

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.

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.

There are 5 simple steps to creating a table plan:

1. Add guests.

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2. Decide who to sit together.

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.

Add guests

Start PerfectTablePlan, if you haven't already done so.

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

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

Each guest has the following properties:

Property	**Meaning**
Anon	Check this if you don't know the guest's name yet.
Title	The guest's title.
First name(s)	The guest's first (given) name(s). You can also record middle names or

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	initials, if you wish.
Last name(s)	The guest's last (family) name(s).
Suffix	Any title or role that comes after the name.
Display name	The name you wish to display for the guest (which may include qualifications, job title and other information).
Gender	Whether the guest is male or female.
Age	Whether the guest is an adult or a child.
Meal	The guest's choice of meal (separated by commas if there are choices in multiple courses).
Special req	Any special requirements the guest has, e.g. diabetic or in a wheelchair (separated by commas if there is more than one special requirement).
Notes	Used to record useful information not recorded elsewhere.
Image	An image or icon representing the guest, up to 128 x 128 pixels.
VIP	Used to mark a Very Important Person. For a wedding this may be a member of the wedding party, for a conference it may be a keynote speaker and for a business lunch it may be a table sponsor.

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RSVP	Whether the guest has been sent an invitation, accepted, declined, cancelled or arrived.
Work phone, Home phone, Mobile	Phone numbers for the guest.
Email	The email for the guest.

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** in the **Guests** and **Groups** pane if they have not been assigned a seat. You can also add custom properties in the Advanced and Professional editions of PerfectTablePlan.

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

If you already have guest data (for example in a spreadsheet, text file, contacts 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>Event Information...** and check the number of attendees and cost using **File>Numbers and Budget...**.

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

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Decide who to sit together

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

You may want to have some guests sitting close to each other (for example: couples, friends and people who you think might be compatible) and some sitting far apart (for example: divorced couples!). The automatic assignment function will take 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.
Near not next to		Should be placed on the same table, but not next to each other.
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.

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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) (Advanced and Professional editions 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. It can have rounded ends.
Circular		A circular table with seats all around it.

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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.
Serpentine		A 180 degree curved table (Advanced and Professional editions only).
Half serpentine		A 90 degree curved table (Advanced and Professional editions only).
Row of seats		A row of seats (no table). Can be curved.

Each table has the following properties:

Property	Meaning
Name	The name displayed for the table. The default name is "Table 1" , "Table 2" etc, but you can set any name.
Shape	See above.
Angle	The rotation angle of the table in the **Floor Plan** and **Table Plan** panes (in degrees).
Colour	The colour of the table in the **Floor Plan** and **Table Plan** panes. This overrides any colour set for the pane.

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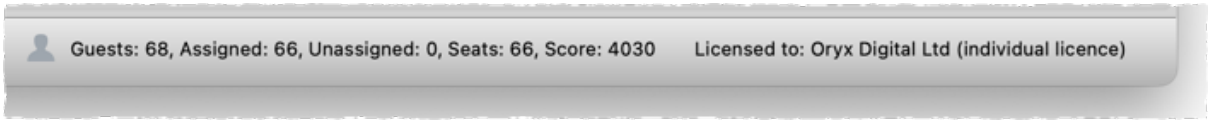
Seats	The number of seats for the table.
Size	The size of the table (in metres or feet). Check the **auto** check box to size the table automatically (according to the seat size and the number of seats).
VIP	Check the box to designate a VIP table. The automatic seat assignment attempts to assign VIP guests to VIP tables.
Notes	Used to record useful information not recorded elsewhere.

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

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

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



New tables will be placed in an empty space near the centre of the **Floor Plan** pane. You can move tables in the **Floor Plan** by dragging them (left-click on the centre of a table, hold down the left mouse button and drag to the appropriate position). You can zoom in and out of the **Floor Plan** using the and buttons (or a 'pinch' gesture, if your device supports gestures), 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 or dragging the bottom right hand corner of the room.

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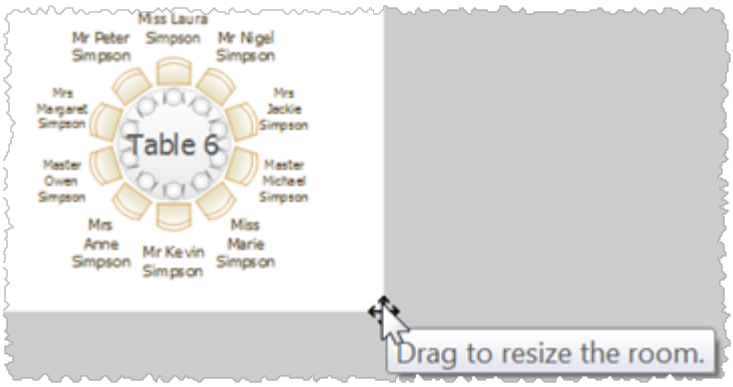

Use the **Insert Line**, **Insert text** , **Insert image** and **Insert shape** buttons to add lines, text, images and shapes to the **Floor Plan** pane. Lines can be used to represent walls and other linear features. Text can be used for titles, headers and footers. Images can be used for decorations, logos or clipart. Shapes can be used to represent dance floors, stages and other features of your floor plan.

Rotate a table, shape or text 45 degrees clockwise or anti-clockwise by clicking the **Rotate clockwise** or **Rotate anti-clockwise** buttons.

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**.

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 ⇧+click or ⌘

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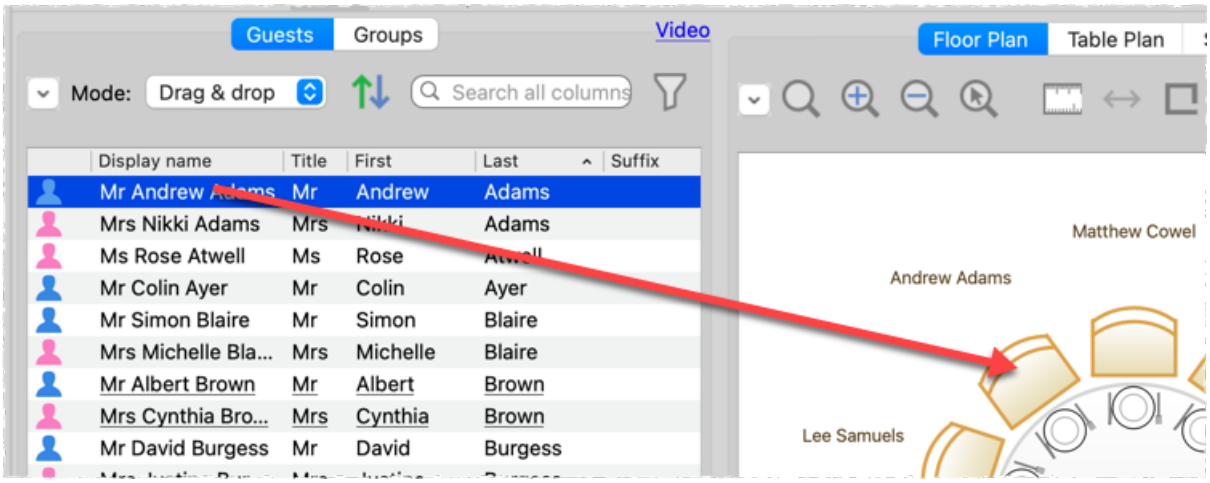
+click). Drag a whole group by holding down the ⇧ key when you start to drag a member of that group. Make sure the **Guests** or **Groups** pane is set to **drag and drop** mode.



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 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. Multiple levels of undo are supported.

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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 also select a seat and choose **Edit>Guest Suggestions** to get a ranked list of guests to place in this seat. The difference that assigning this guest will make to the overall seating score is shown in brackets. Select a guest if you want to place them in the seat (swapping them with any existing guest).

You can see how good your seat assignment is by:

- Pressing the button at the top of the **Floor Plan** or **Table Plan** panes. Guest will be coloured from green (happy) to red (unhappy).

- 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).

- Looking at the scores in the **Schematic** pane (check **show scores**, positive scores are good, negative scores are bad).

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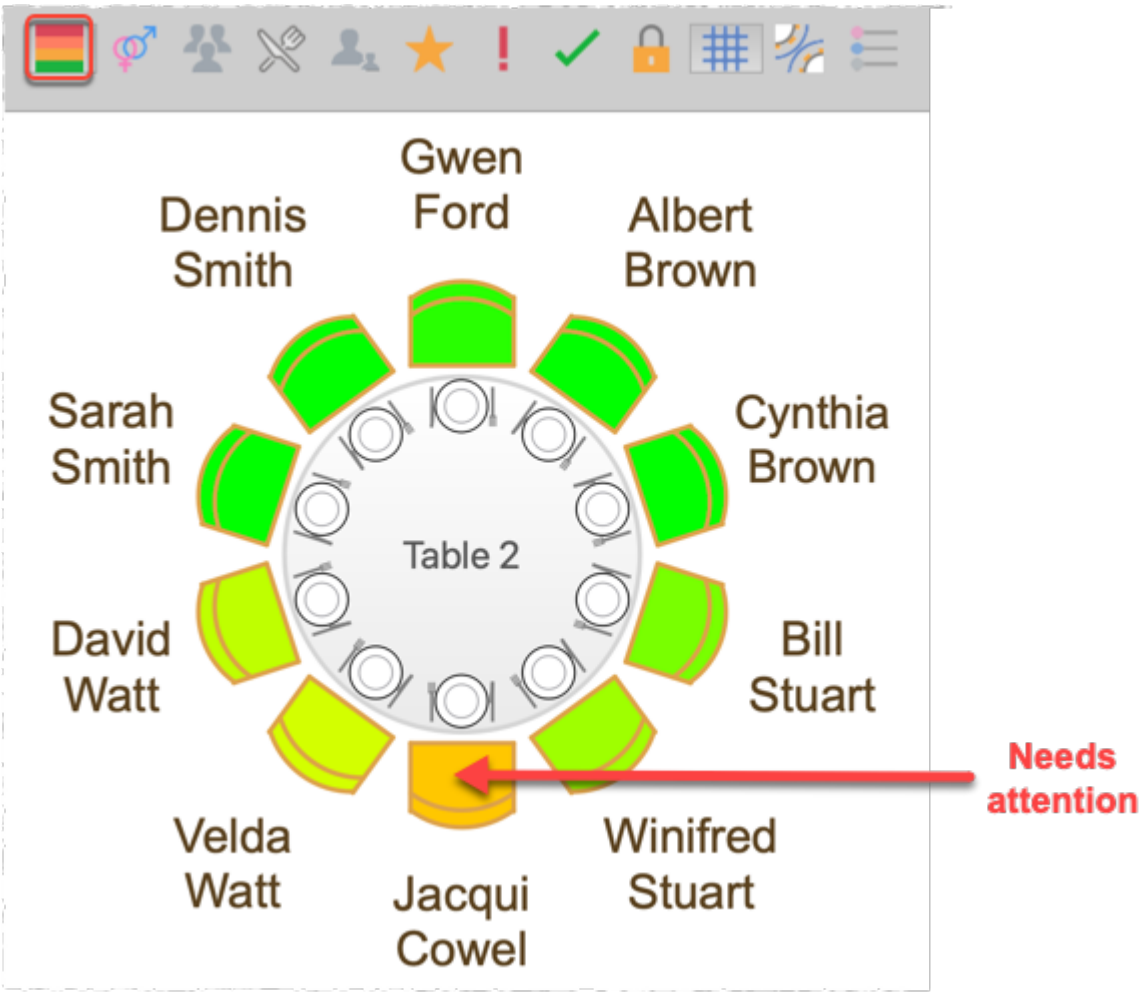

To see these proximity buttons you will need to click on the button in the **Floor Plan** or **Table Plan** pane. Obviously, what makes a good table plan is hard to fully define in mathematical terms, but the score will usually give a fair indication.

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.

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Output

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

When you are happy with your table plan you can:

- Print off the **Floor Plan** , **Table Plan**, **Table Chart**, **Guest Chart**, **Stationery** and/or **Report** panes using **File>Print** or the equivalent **Main** tool bar button.
- Copy the contents of the **Floor Plan** , **Table Plan**, **Table Chart**, **Guest Chart** and/or **Report** panes into the clipboard using **Edit>Copy.**
- 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
- How do I?
- Expert tips

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1.3 Tutorial

1.3.1 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 >>

1.3.2 1. Getting started

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

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

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

You can also print the PDF version of the help.

Warning The PDF help is more than 300 pages!

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

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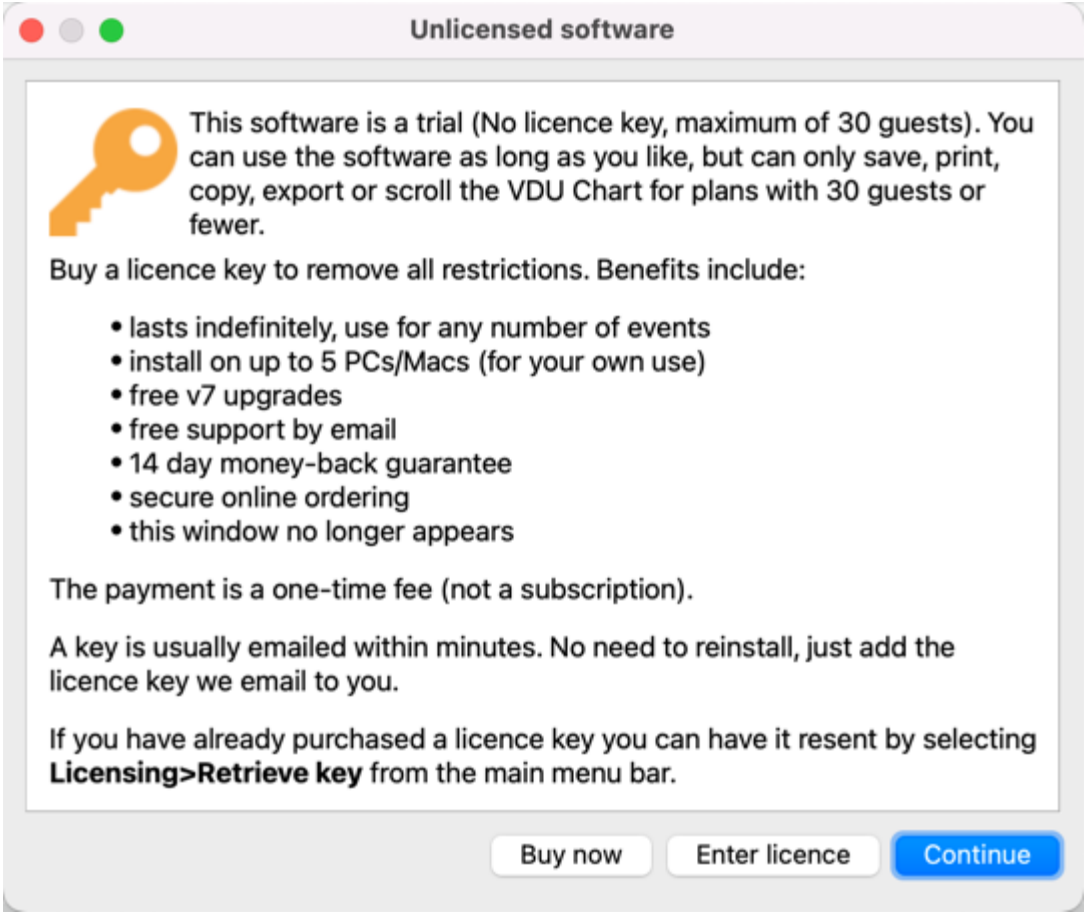

If you have a licence key you can enter it now, however you can complete the tutorial without it. Click the **Continue** button.

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.

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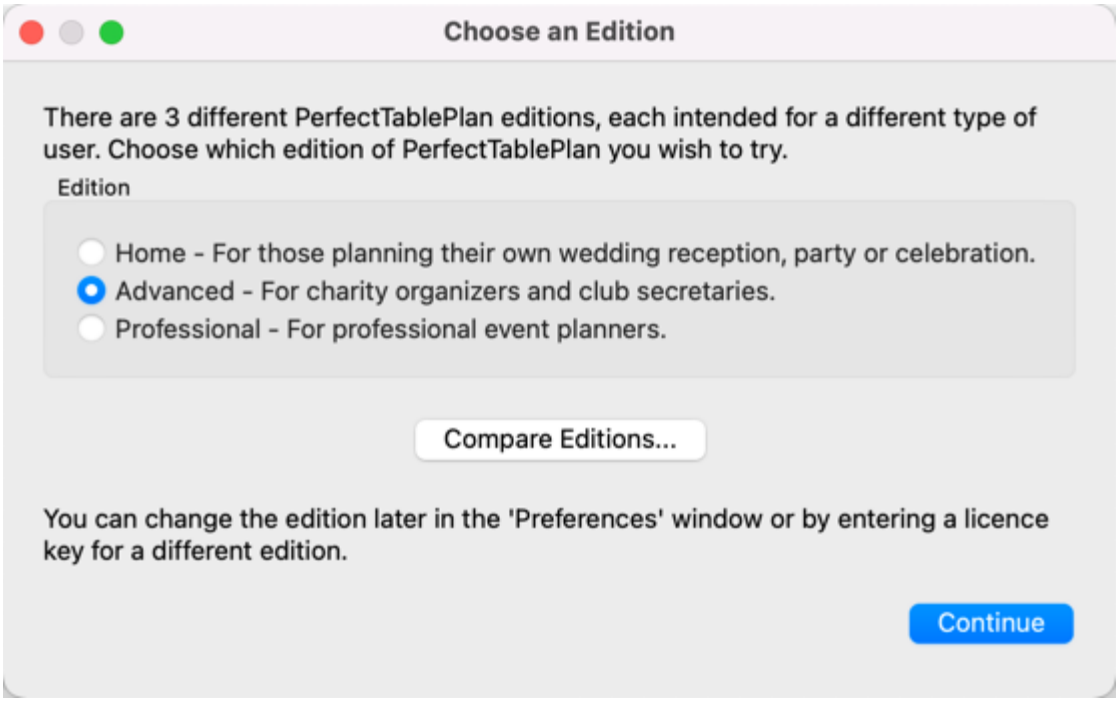

The **Getting Started** window may now appear.

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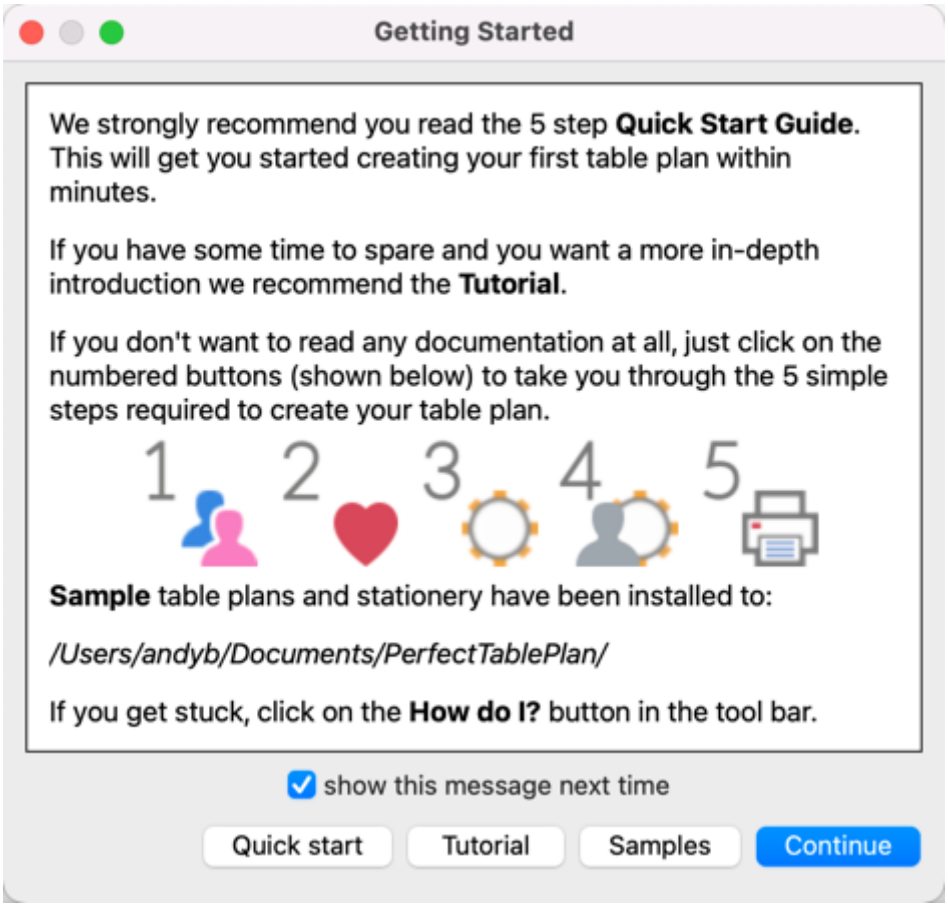

If you don't want to see this window again, uncheck the **show this message next time** check box. Click the **Continue** button. You should now see the **Main** window. Click on the **1.Guests** button in the **Task** tool bar, if it isn't already selected.

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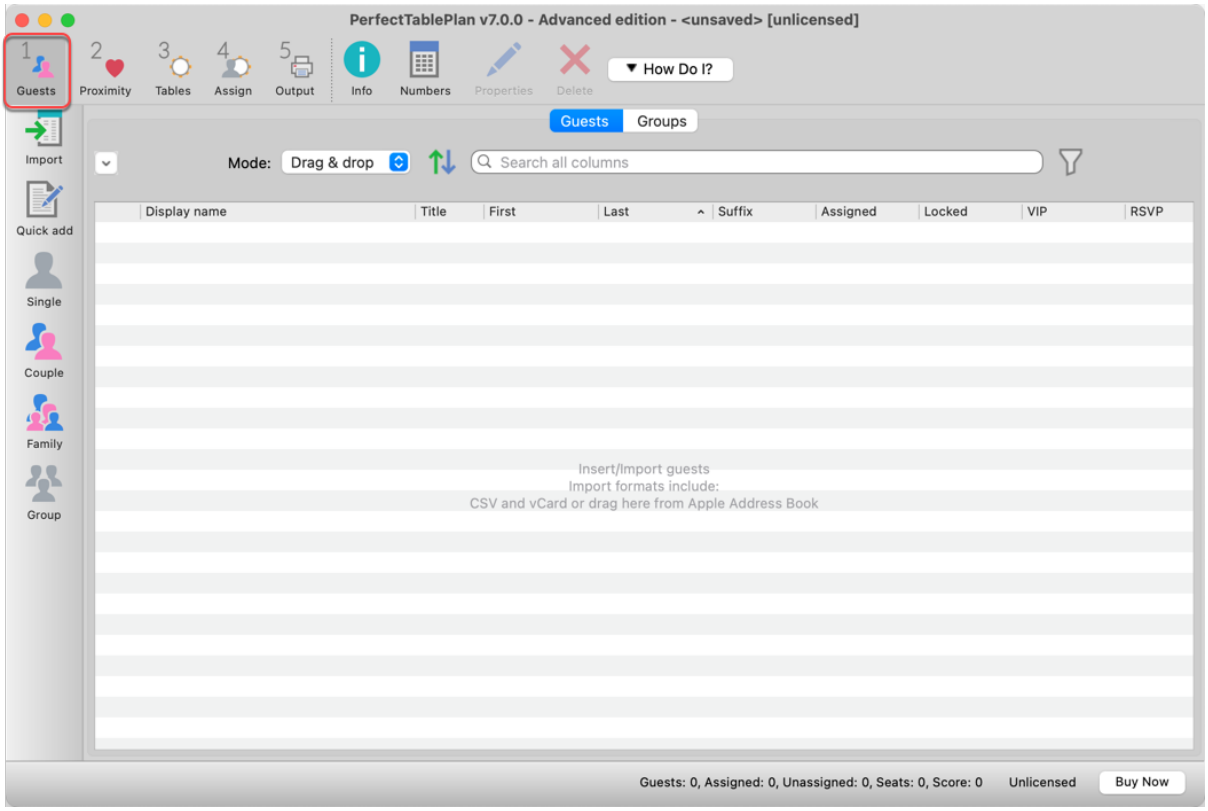

Take a minute to investigate the various menu items and tool bar buttons. If you hover the mouse cursor over a tool bar button, a **Tool tip** window will appear with some helpful text.

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

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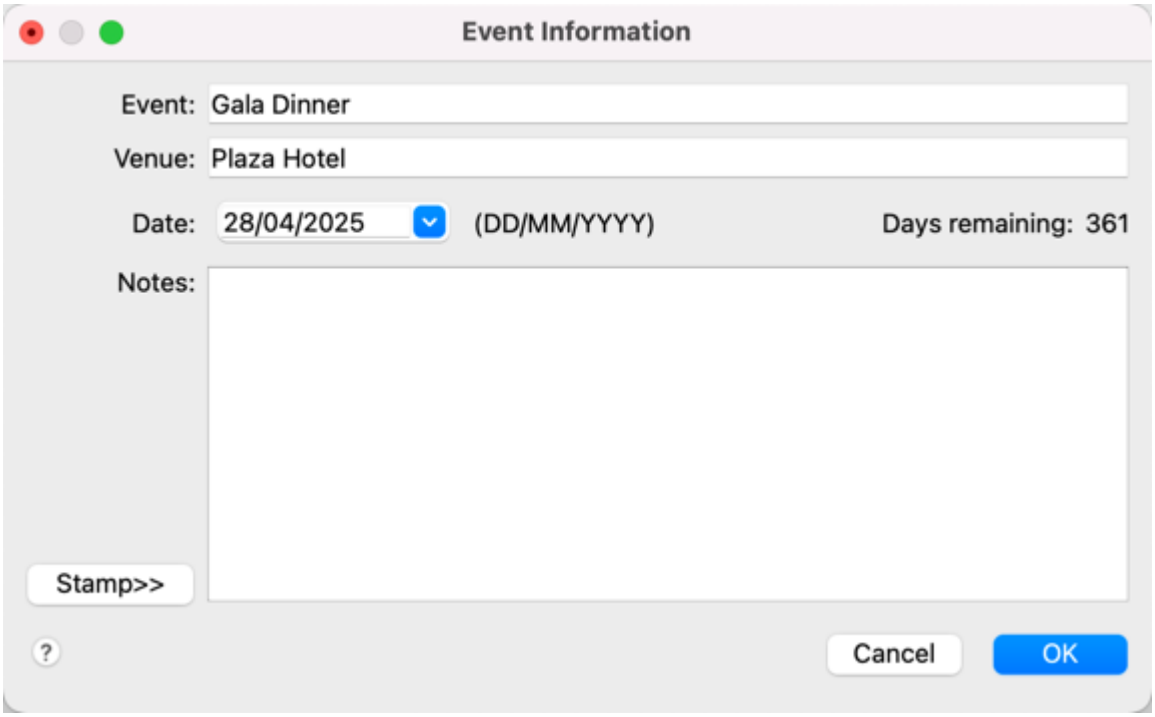

Click **OK**.

Next: 2. Add guests >>

1.3.3 2. Add guests

The first step to creating your table plan is to add information about your guests. You can import guests from an existing guest list, but we are going to add them directly here.

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

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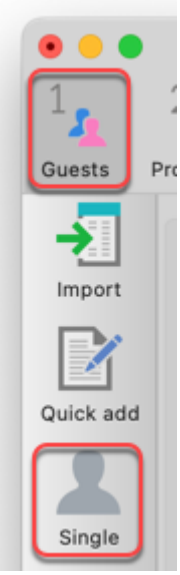
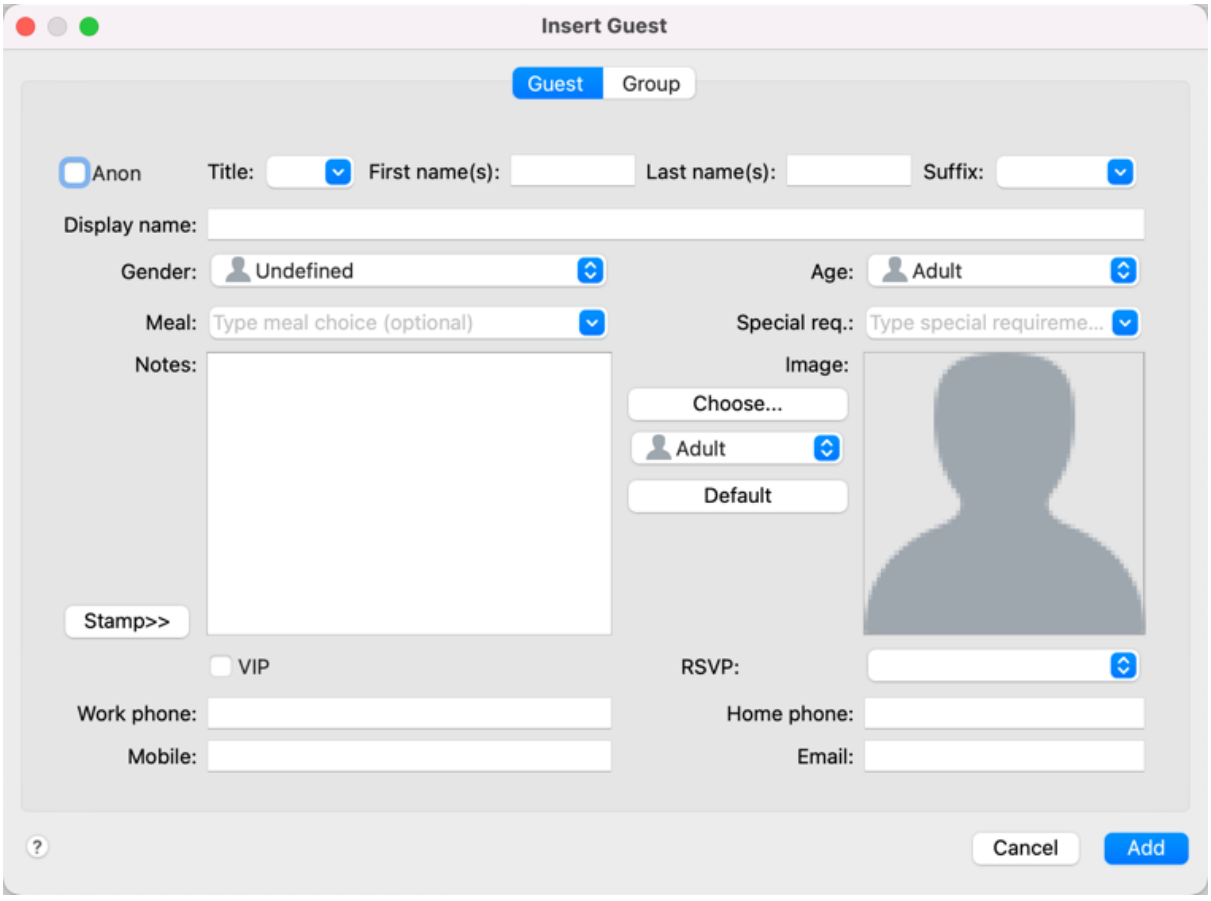


The **Insert Guest** window will appear.



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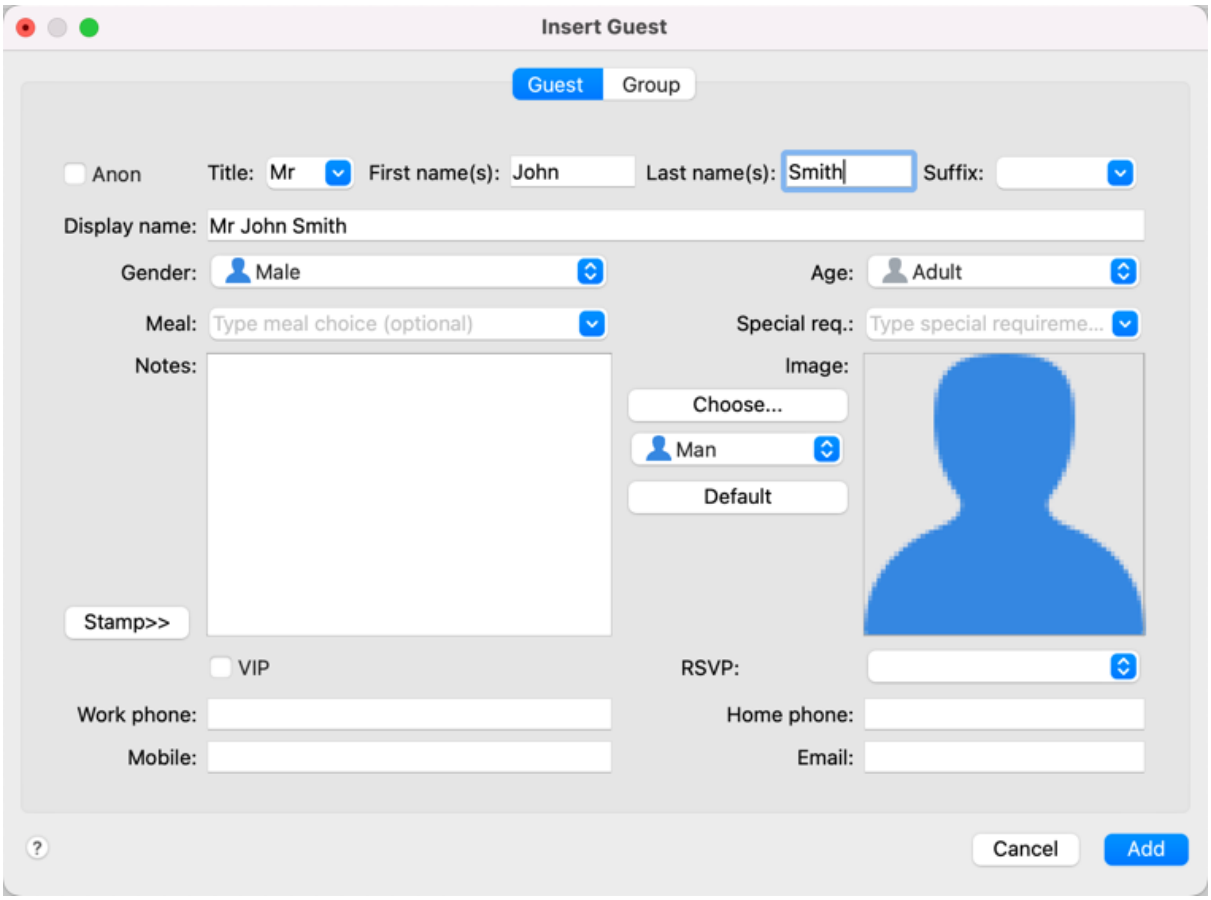
Select **Mr** from the **Title** drop-down list. Note that the **Gender** has now been set to **Male**.

Type `John` in the **First name(s)** field. Press the keyboard *Tab* key to move to the next field.

Type `Smith` in the **Last name(s)** 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.

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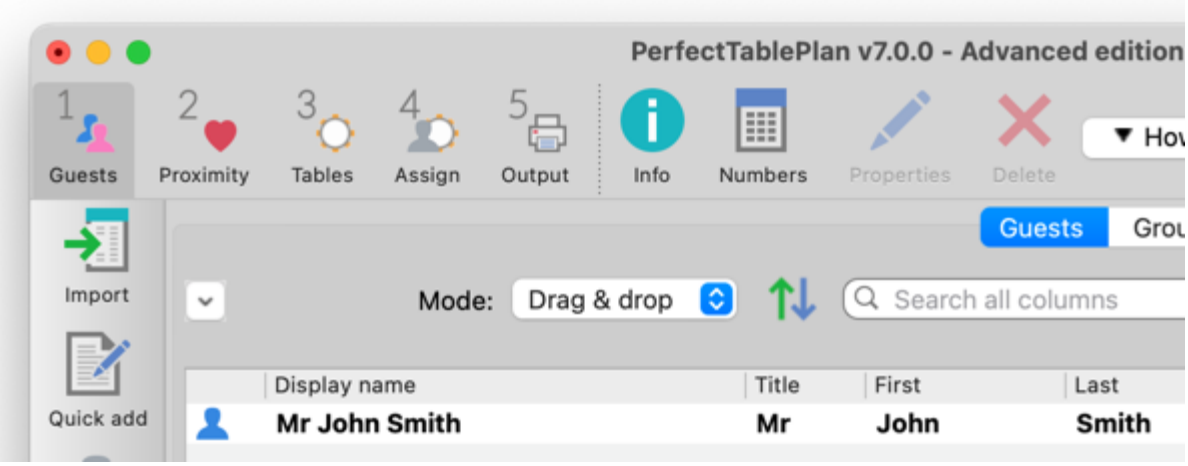

Click on the **Insert guest couple** button in the left (**Insert**) tool bar. The **Insert Couple** window will appear. Fill in the details of the first guest of the couple, as below. Click on the **VIP** check box to show that this is a particularly important guest:

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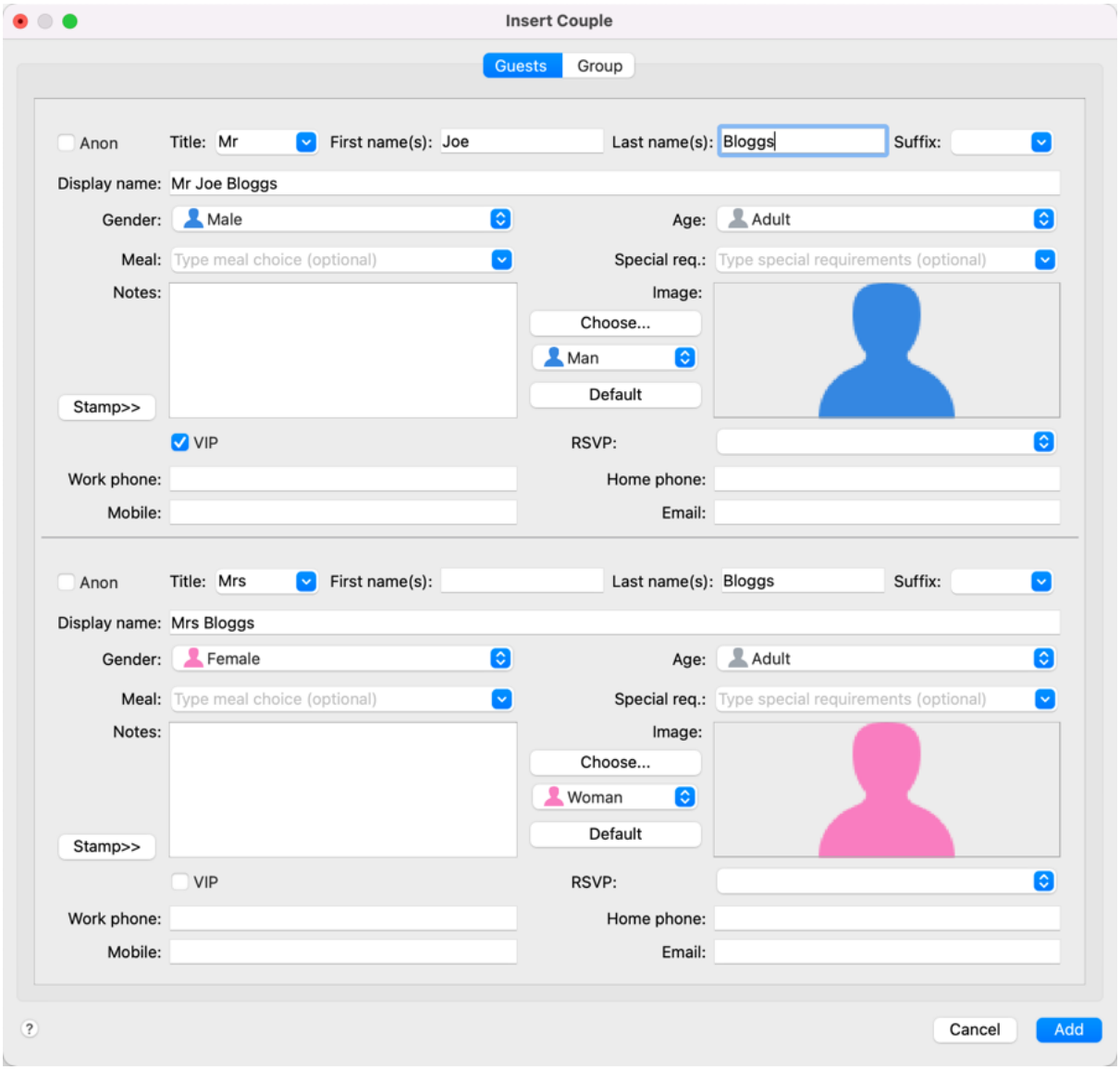

Now complete the details of the second guest of the couple, as below:

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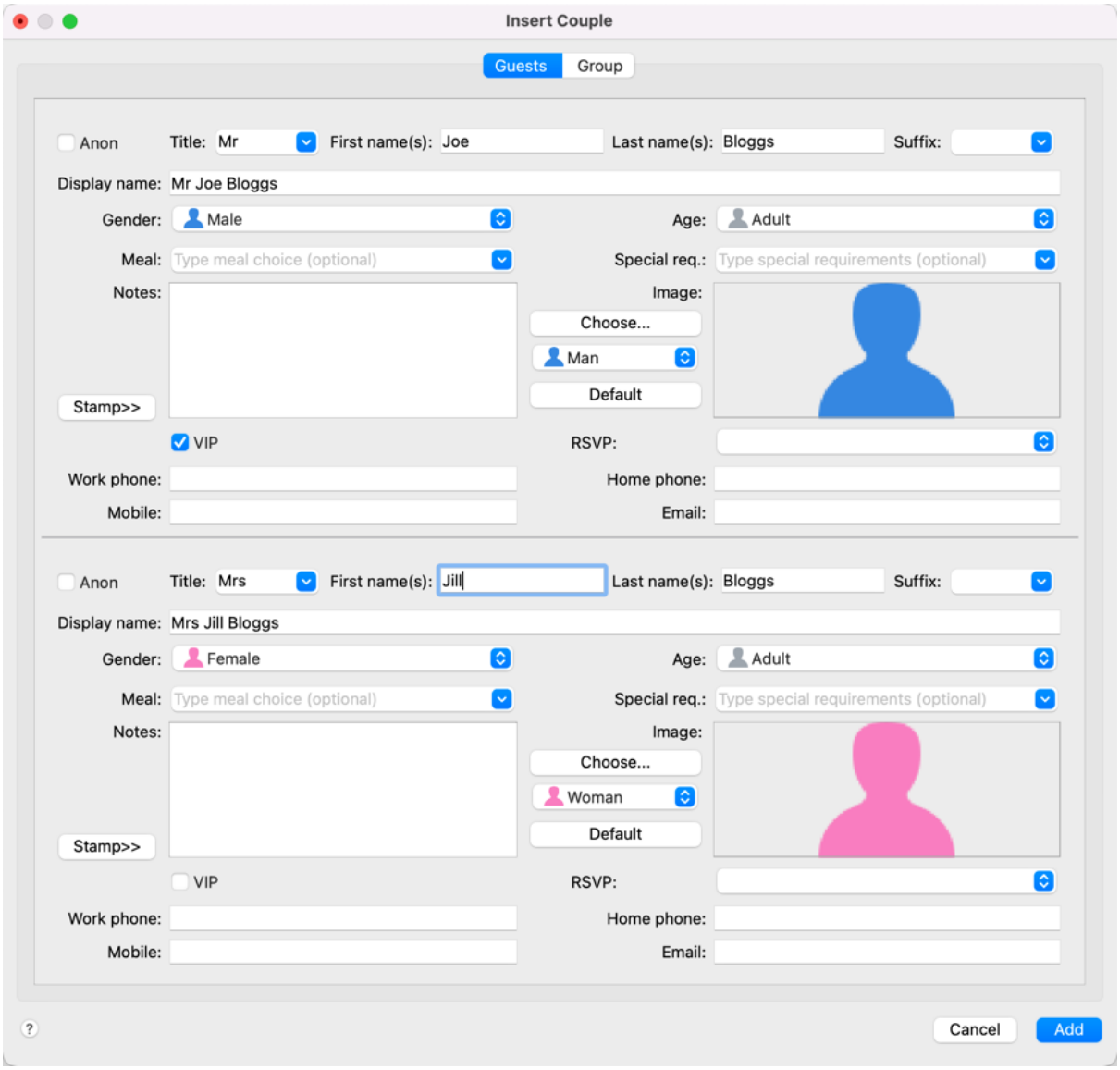

Click the **Add** button.

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

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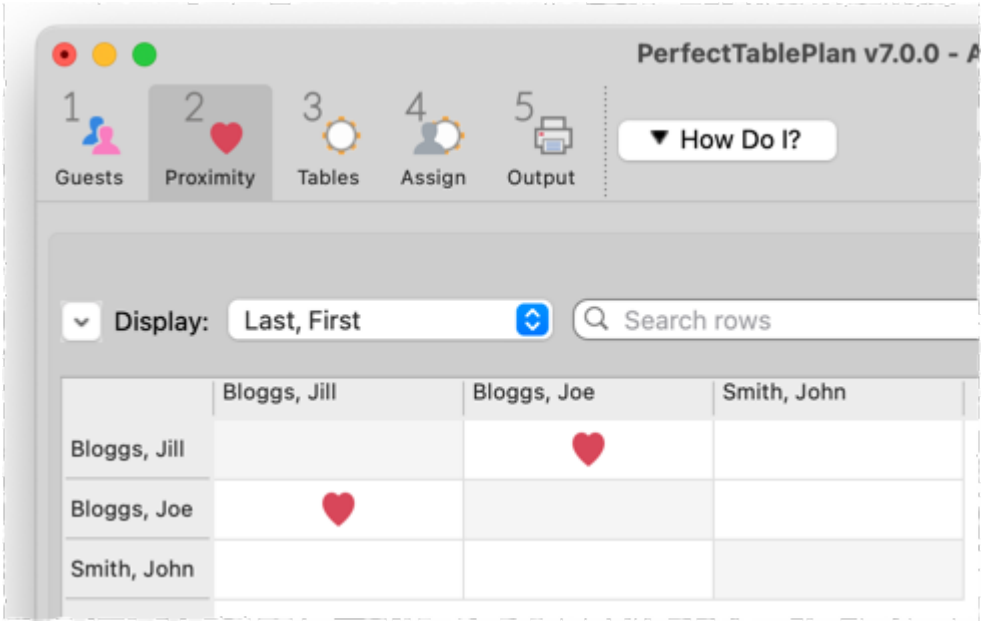

This means that Joe Bloggs and Jill Bloggs should be placed on a table next to each other.

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

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

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

Note that you will have to scroll down the window to add all the guest details.

Click the **Add** button.

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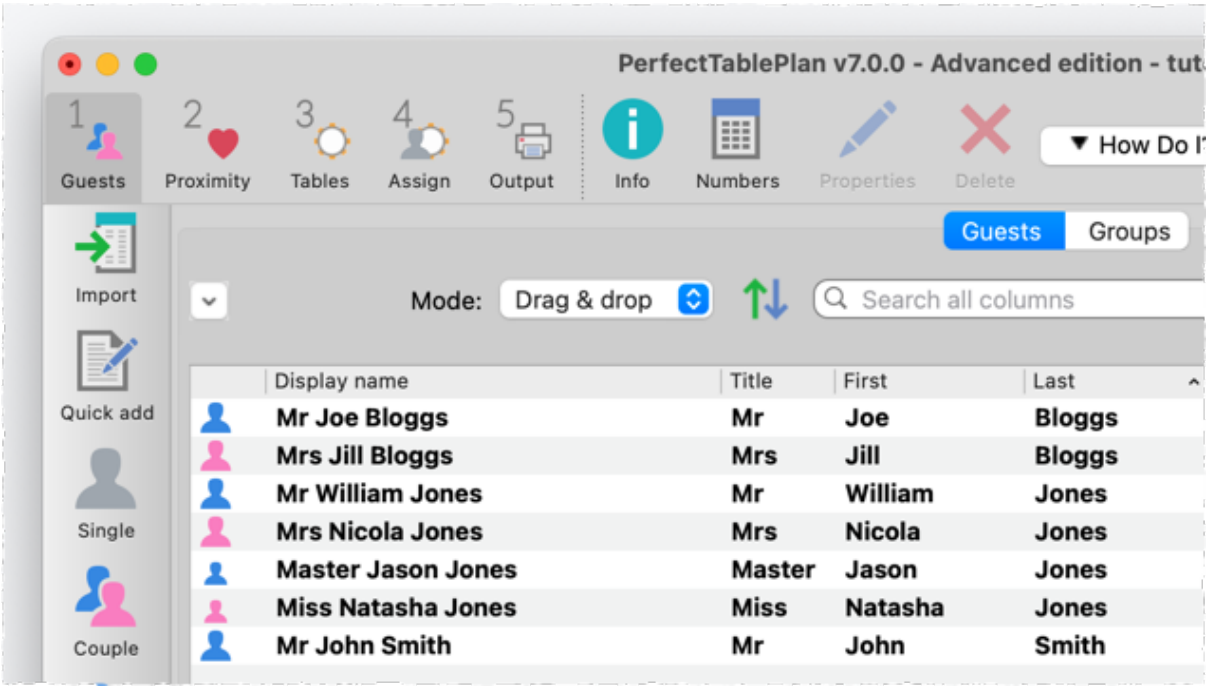
Click on the **2.Proximity** button in the **Task** tool bar. Notice that a is displayed in the **Proximity** pane for Mr and Mrs Jones. A is displayed for all the other family members. This means that Mr and Mrs Jones should be placed on a table next to each other, and the rest of the family members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

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

Look at the **Guests** pane.



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.

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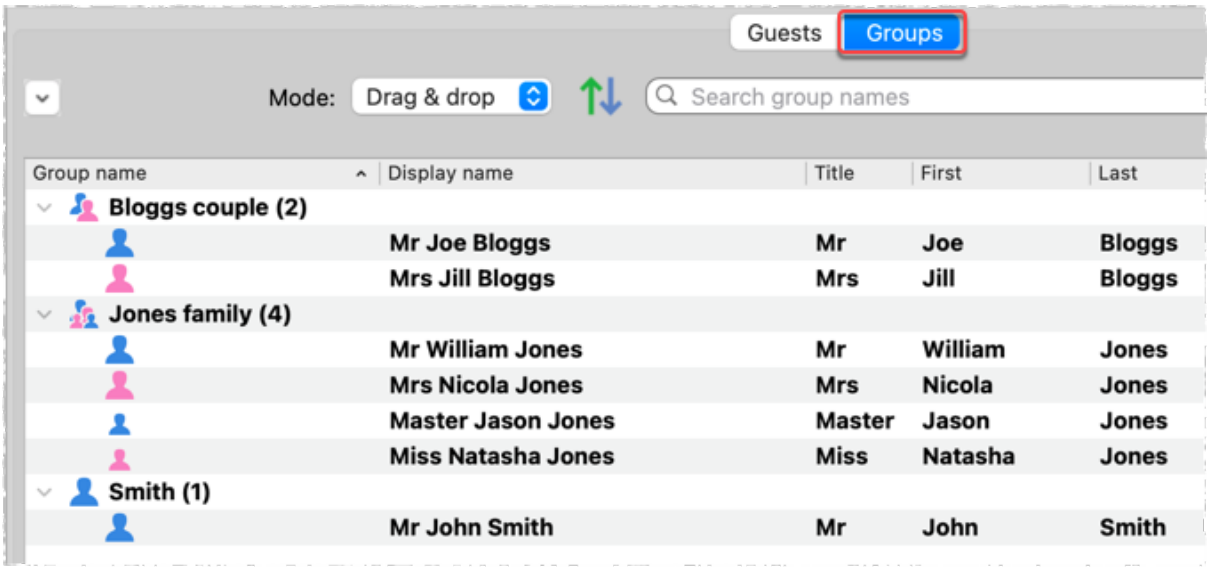
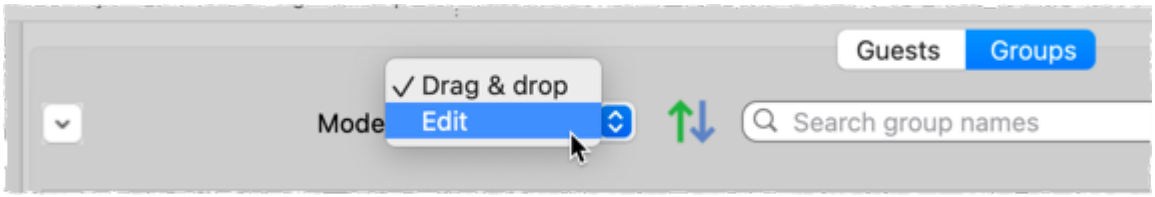


Notice that the guests have been grouped as a couple, a family and a single person (you can easily re-arrange the groups using drag and drop).

Select **Edit** mode:



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

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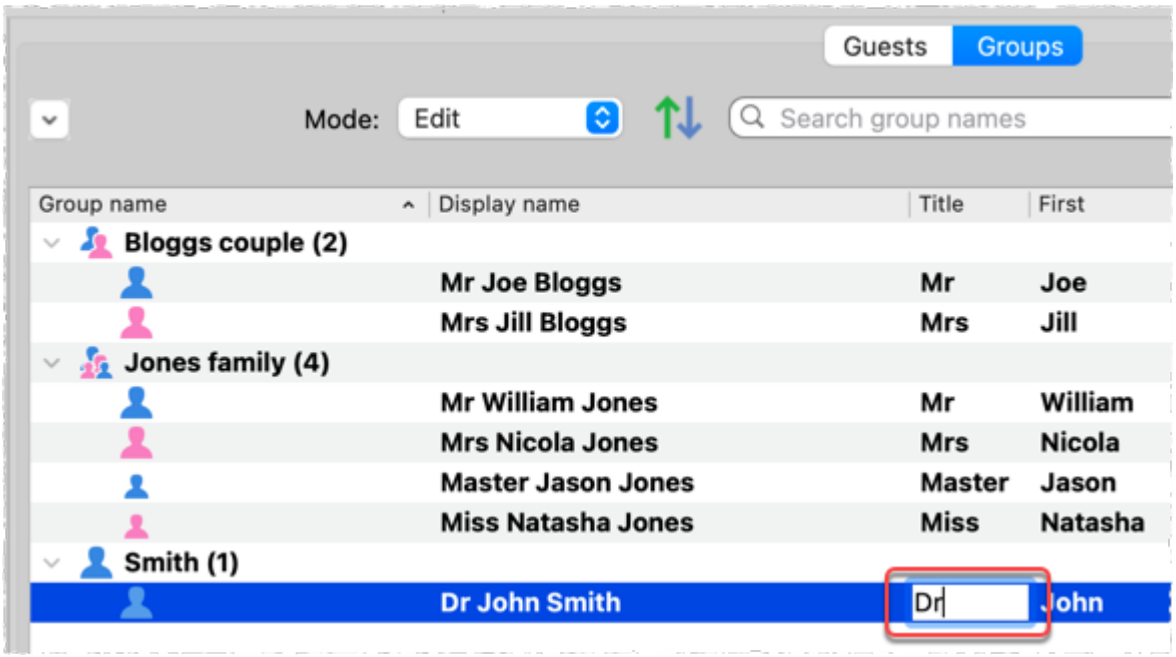

Note the **Display name** is also updated (unless you have previously edited it). You can view/edit this guest by double-clicking on his icon to display the **Guest Properties** window.

You can also set your guest's image, 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 and Numbers. This can save you a lot of typing. Importing is covered in Tutorial 9.

Next: 3. Set proximity >>

1.3.4 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 **2.Proximity** button in the **Task** tool bar to show the **Proximity** pane:

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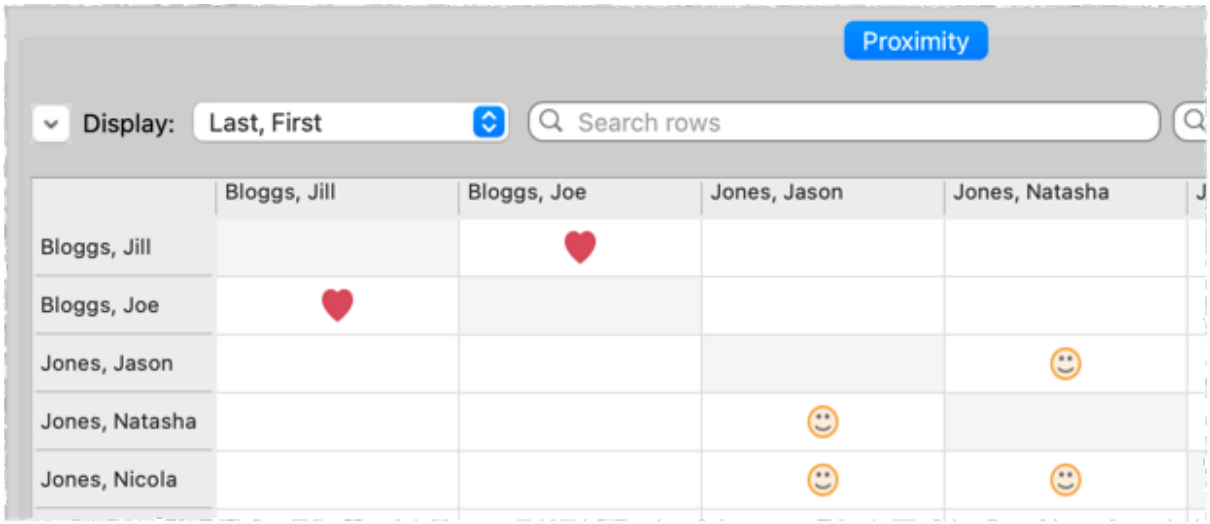
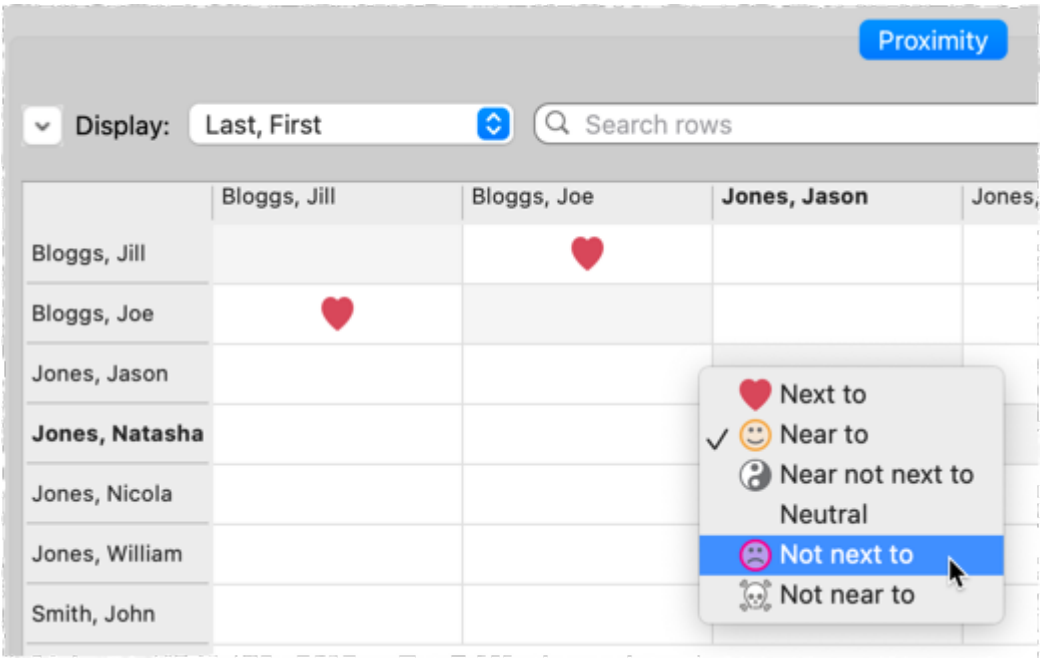


The ❤️ means that these guests should be placed next to each other. The 🙂 means that these guests should be placed near to each other, either next to or on the same table, but lower priority than ❤️.

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



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

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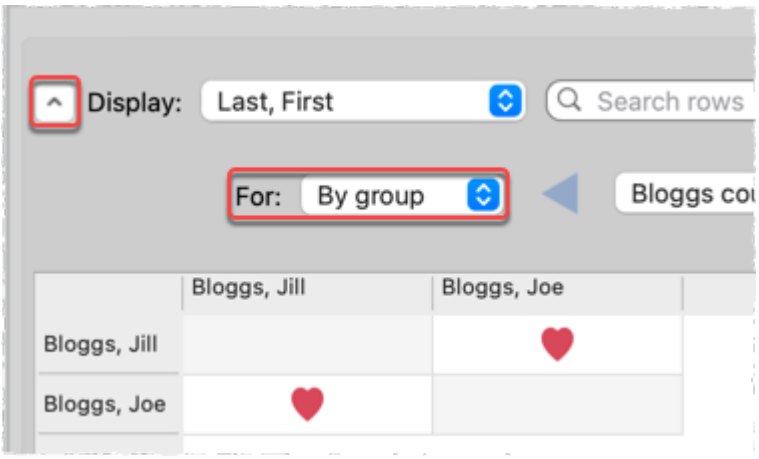
Click on the button at the top of the pane to show additional options. Select **By group** from the **For** drop-down list. The **Proximity** pane now shows just one group at a time.



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

Next: 4. Add tables >>

1.3.5 4. Add tables

The next step 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.

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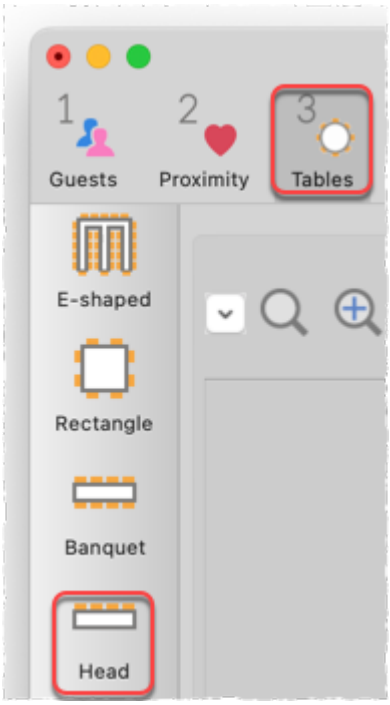
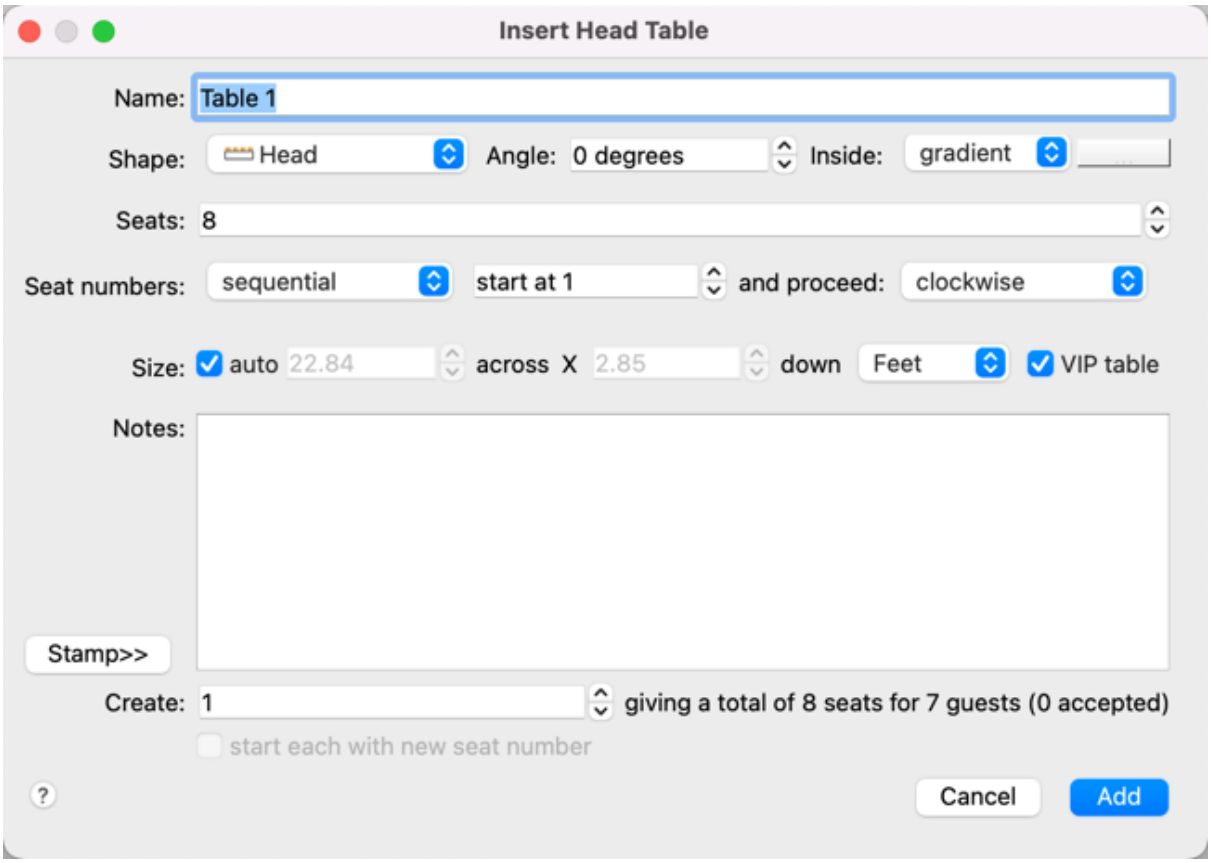


The **Insert Head Table** window will appear.



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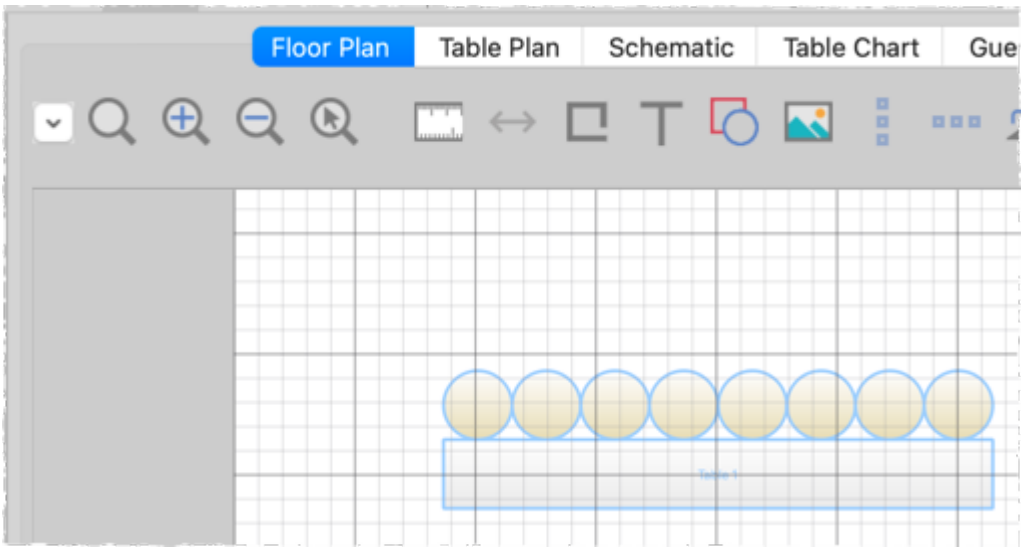
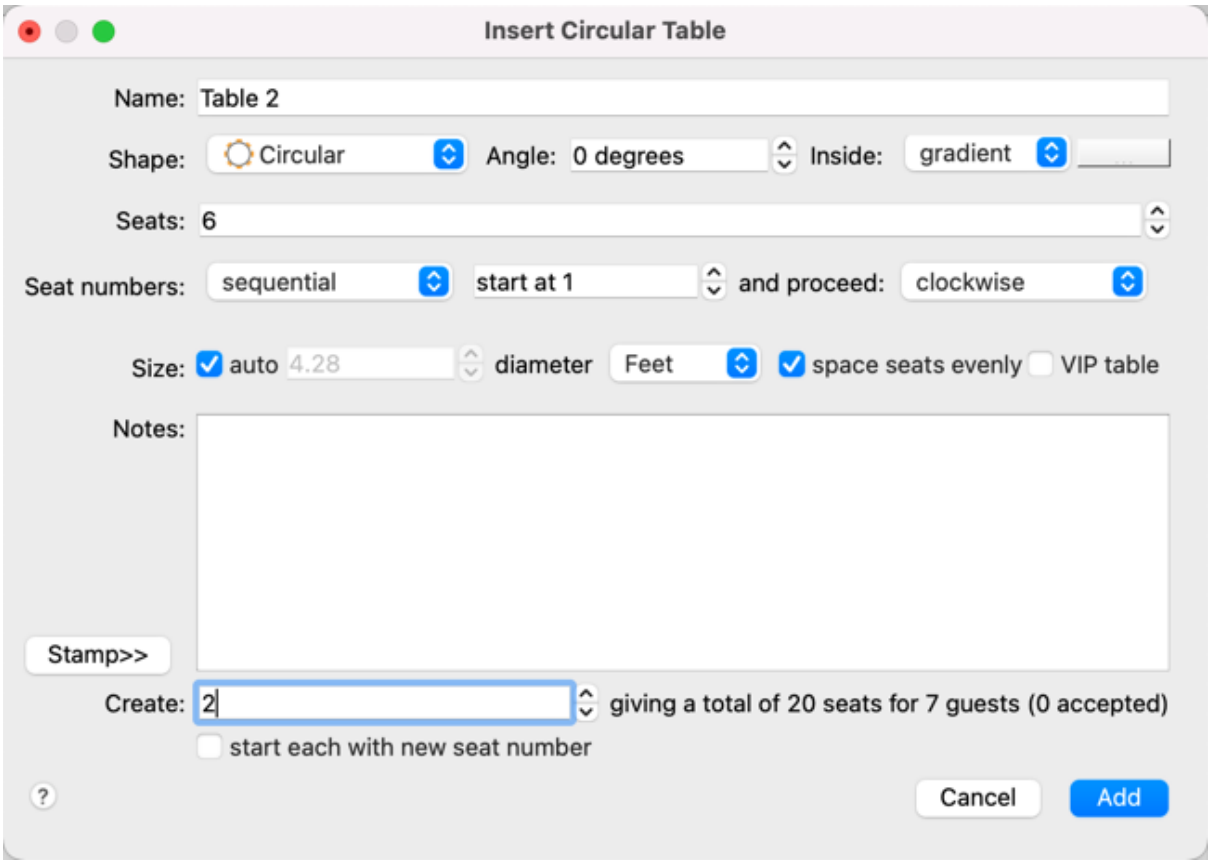
Click the **Add** button. A long rectangular table with 8 seats down one side will now appear near the centre of the **Floor Plan** pane.



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



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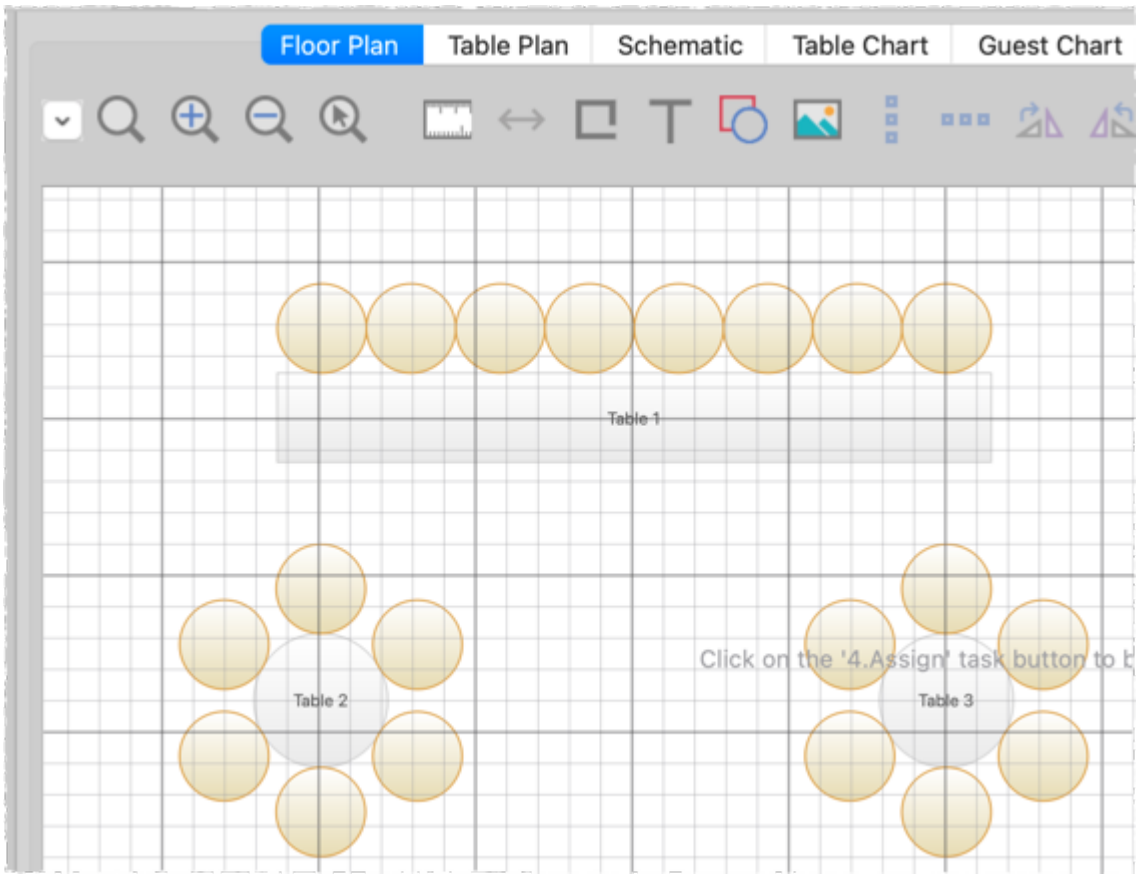
Leave the **auto** box checked to allow PerfectTablePlan to set a table size based on the number of seats and the **Seat width** set in the **Dimensions** window.

Next to the **Create** field 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 the tables to the approximate positions shown below. Currently both tables are selected. Left-click and release on a table to select just that table. Left-click on the table again and, holding down the mouse button, drag it to the desired position and release. Repeat for the other table.



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

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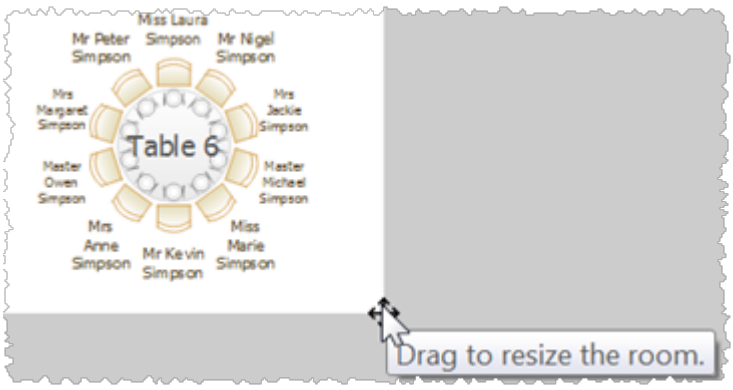
Note You can also use the mouse wheel (if you have one) for zooming or scrolling (depending on the setting in the **Preferences** window).

You can change the size of the floor plan using the button or by dragging the bottom-right corner of the room. This allows you to enter the dimensions of the venue in which the event will take place.

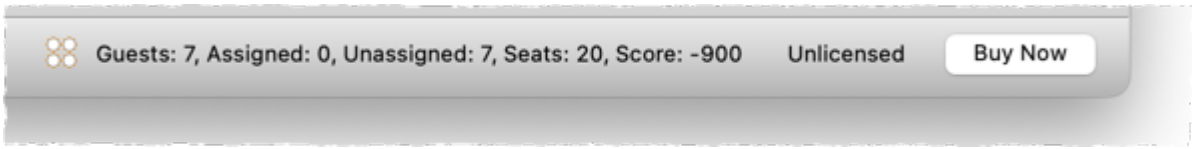


You can add lines, shapes, images and text to the floor plan by clicking on the , , and buttons.

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

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

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



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

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

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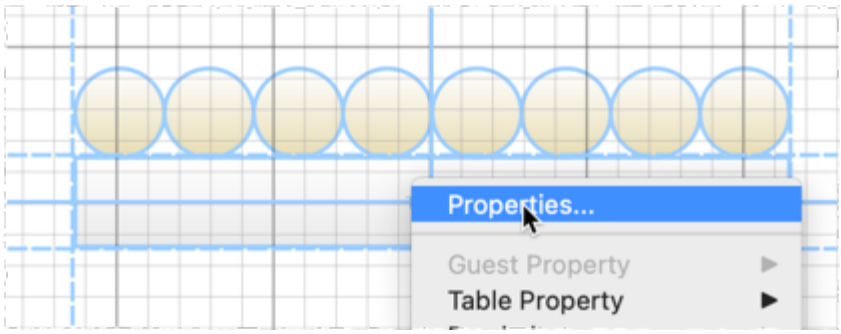

Change the number of seats to 6. Click the **OK** button.

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 >>

1.3.6 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.

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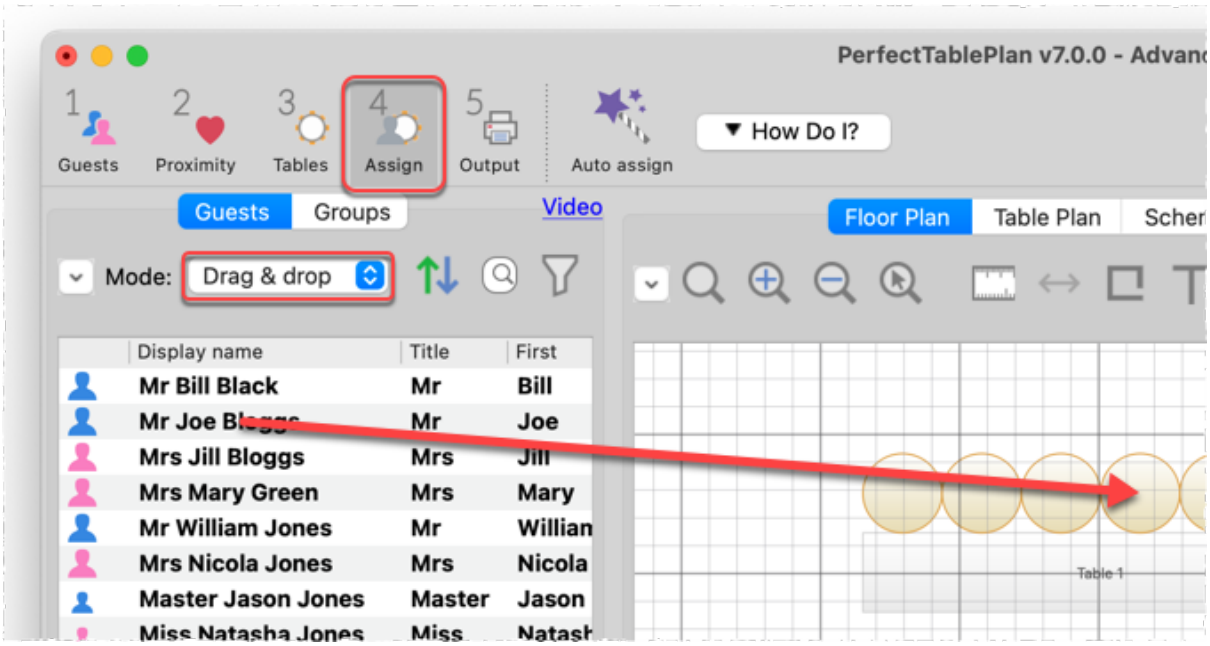
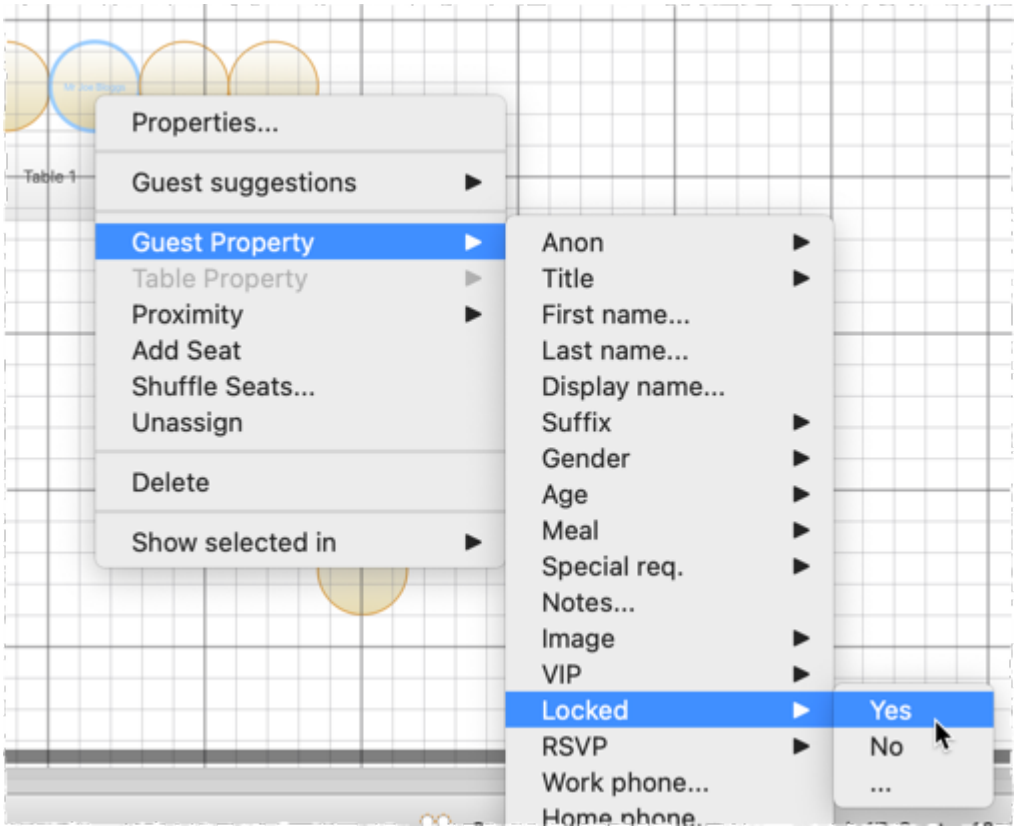


Right-click on the seat you have dragged `Mr Joe Bloggs` to in the **Floor Plan** pane and select **Guest Property>Locked>Yes**.



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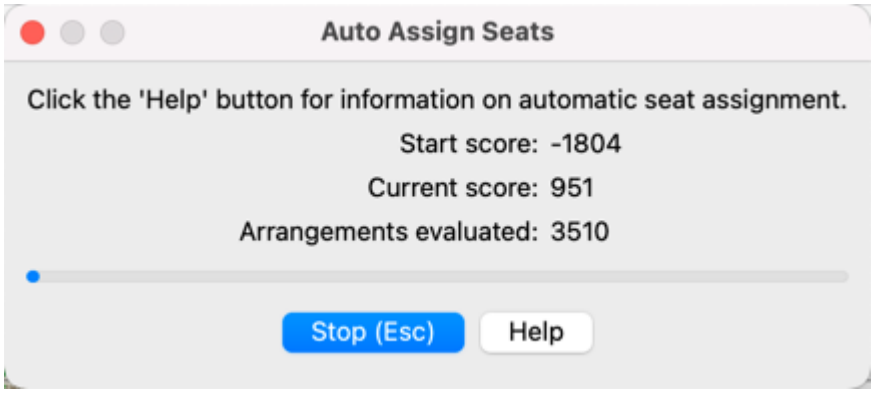
A locked guest cannot be re-assigned until they have been unlocked. This is particularly useful for stopping the **Auto seat assign** from moving guests who you wish to remain in their assigned seat. You can also select a table and lock all the guests on it.

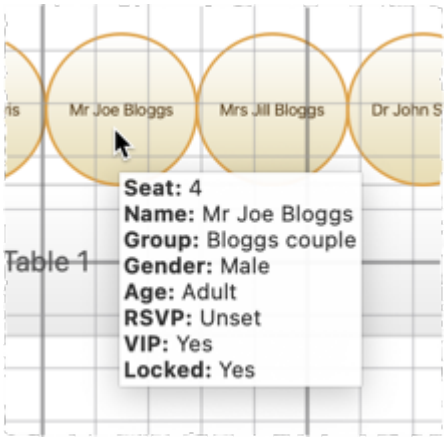
Drag `Mrs Jill Bloggs` to the next seat to `Mr Joe Bloggs` and lock her, in the same way. Note that locked guests appear underlined in the **Guests** and **Groups** panes.

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:



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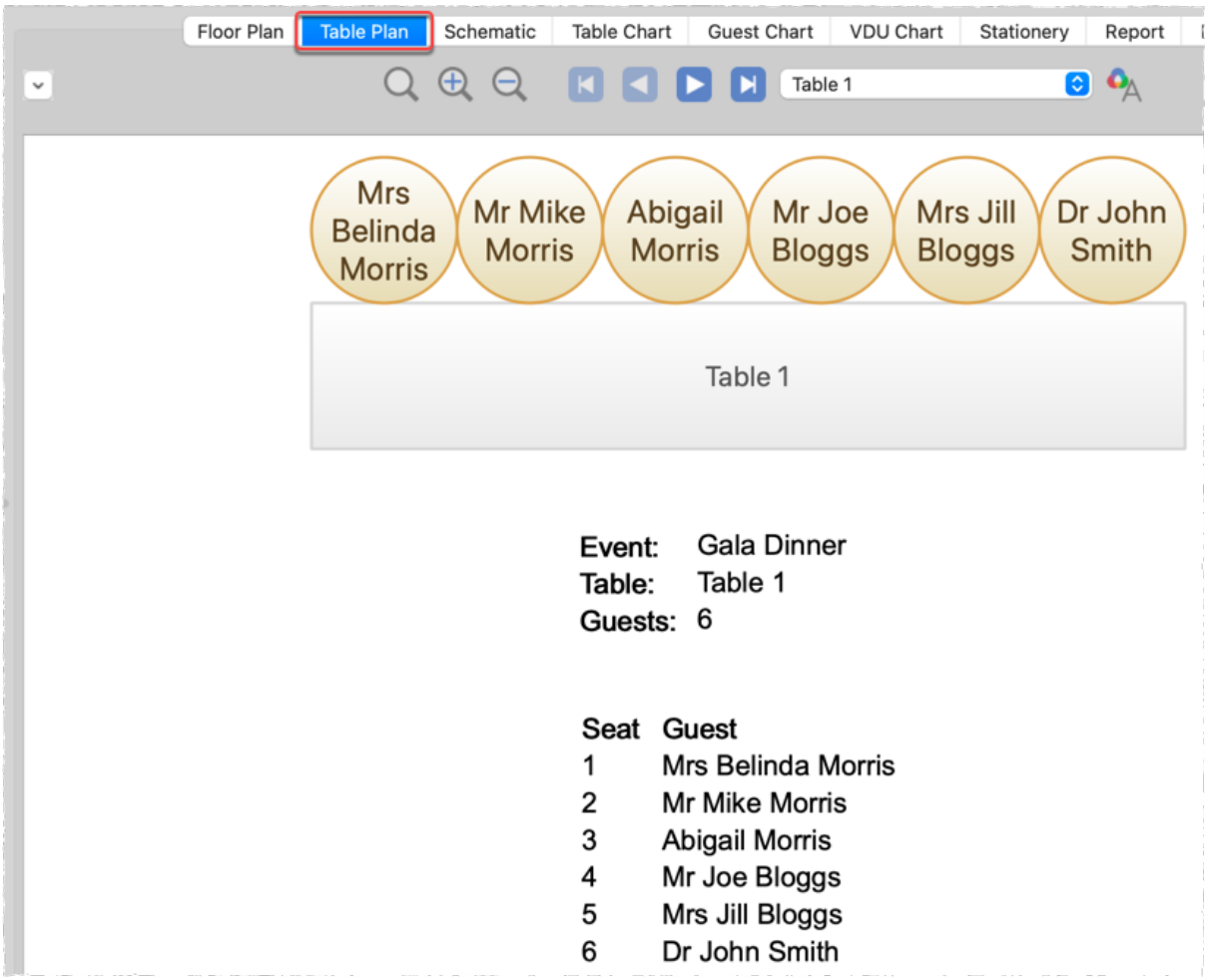
Notice that the locked guests have not been moved and that guests that are assigned to seats are no longer displayed in bold in the **Guests** and **Groups** pane.

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 >>

1.3.7 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**

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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:

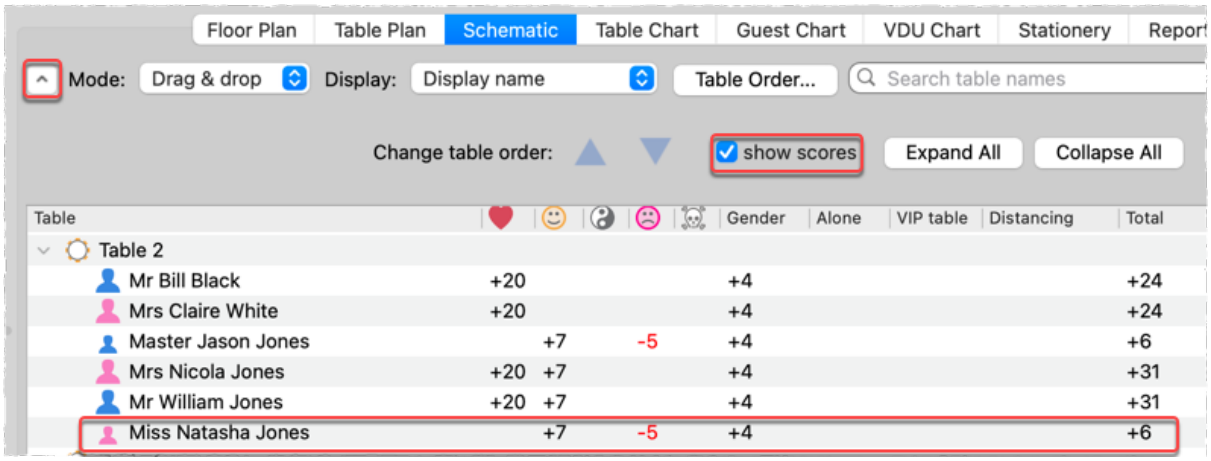
+5 for being next to Mrs Nicola Jones with 🙂 proximity

+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

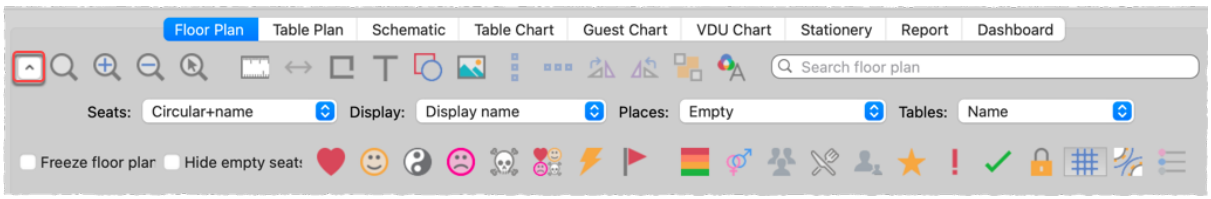
= +6 total



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.



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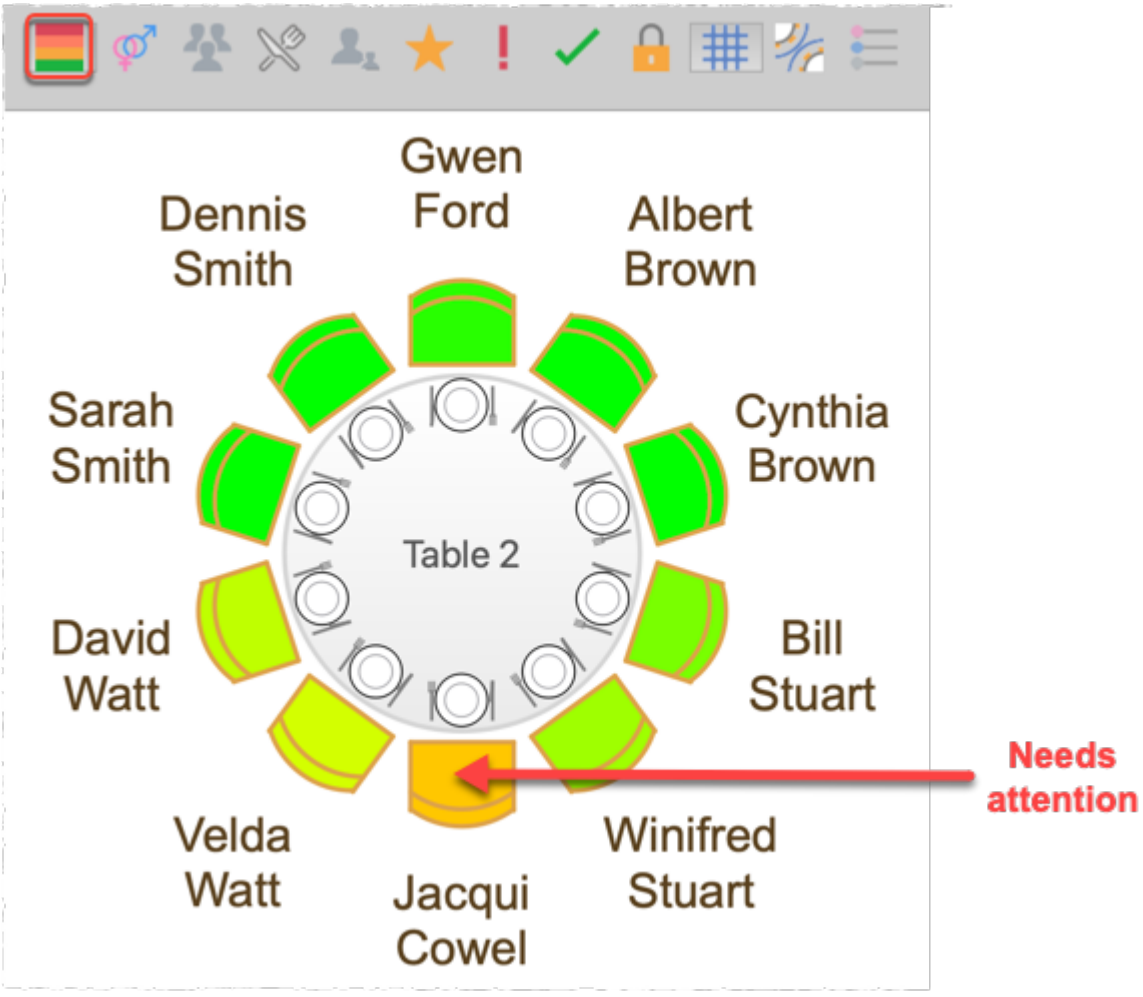
Holding down any of the ❤️ 🙂 ☯️ ☹️ ☠️ buttons will draw lines between guests who have this proximity. Holding down the 💑 button shows all proximities. The lines are coloured according to the proximity, e.g. red for ❤️.

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 guests according to how well seated they are based on the proximity of nearby guests; green for well seated and red for poorly seated.



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

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

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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 age (children are shown smaller).

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.

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 >>

1.3.8 7. Print plan

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

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

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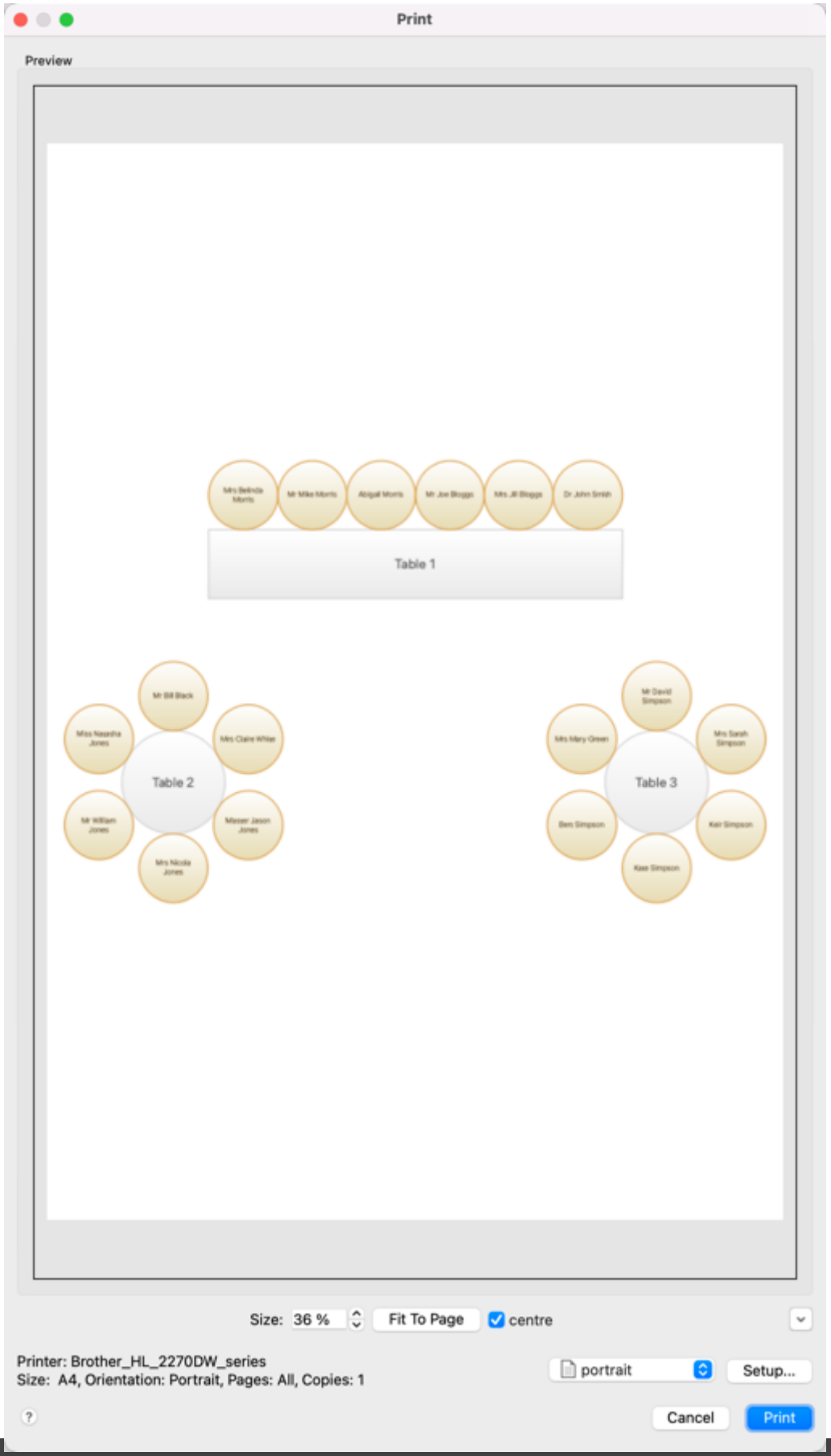

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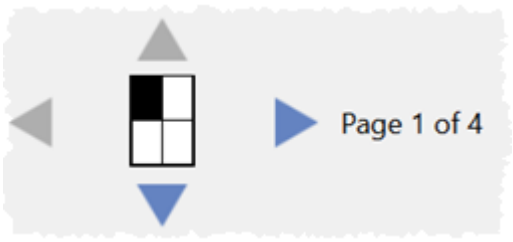
Increase the **Size** until the plan will be printed across 4 pages (setting it to 140% should be about right). Click on the navigation control to preview different pages.



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 a chart ordered by table.

Print the **Guest Chart** pane to see a chart ordered by guest or group.

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.**

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 >>

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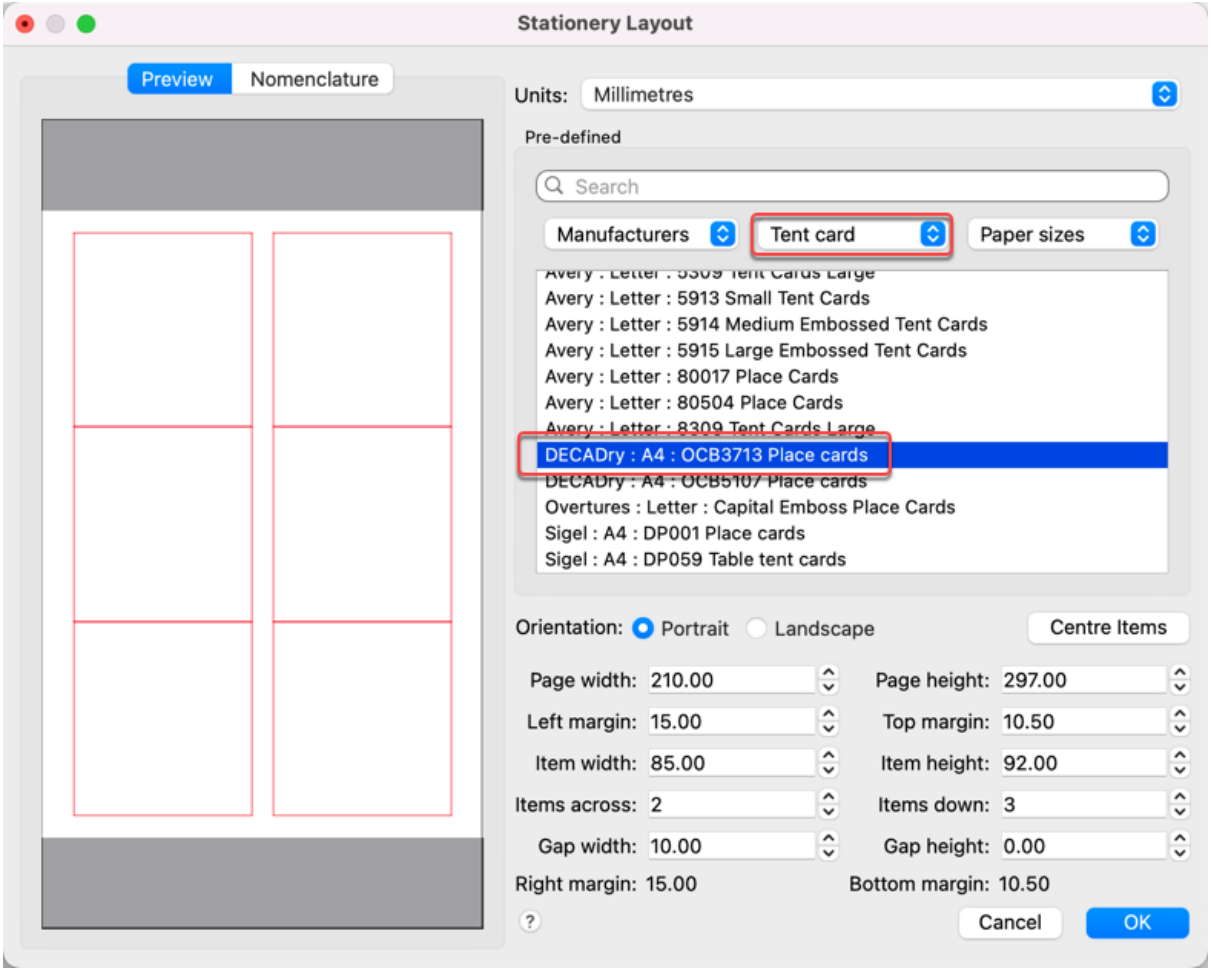
1.3.9 8. Print stationery

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**.



Make sure the **Design** tab is at the front.

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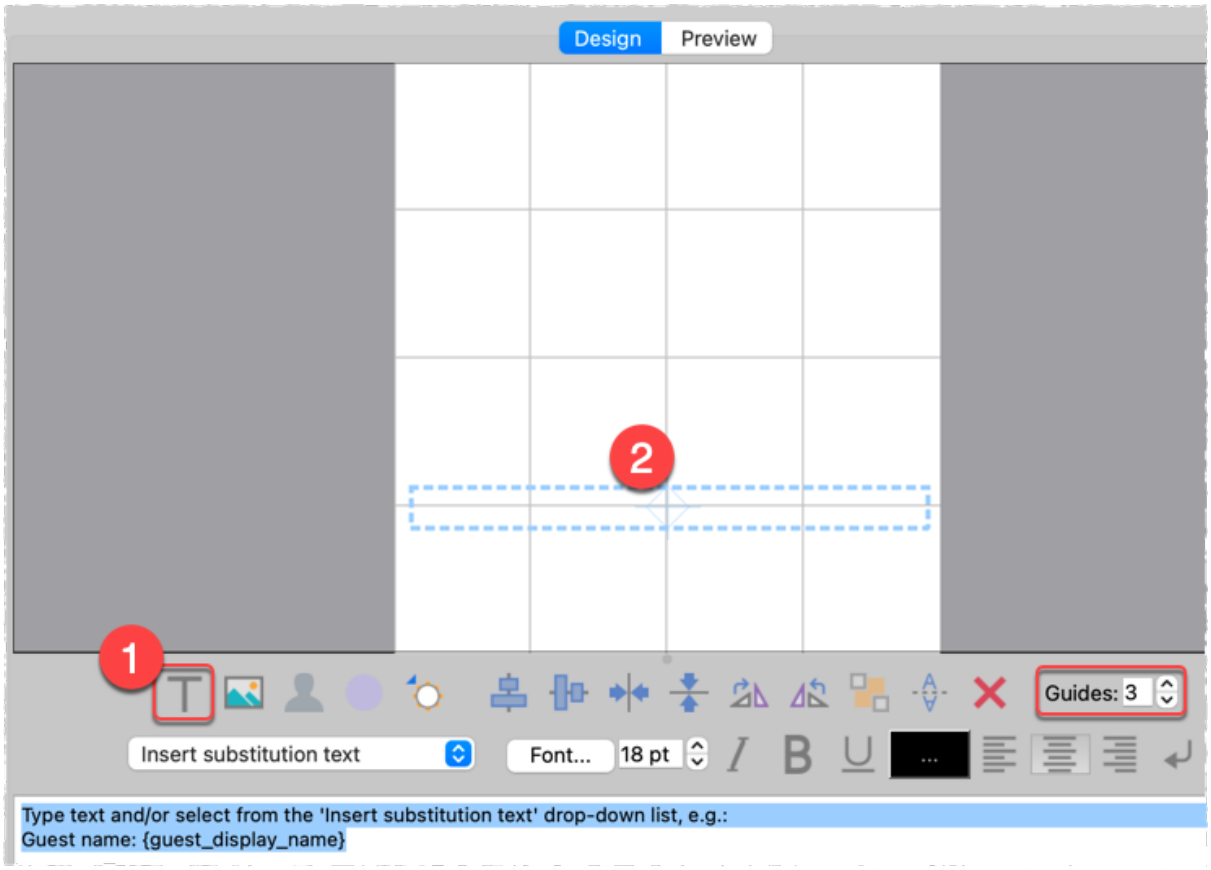
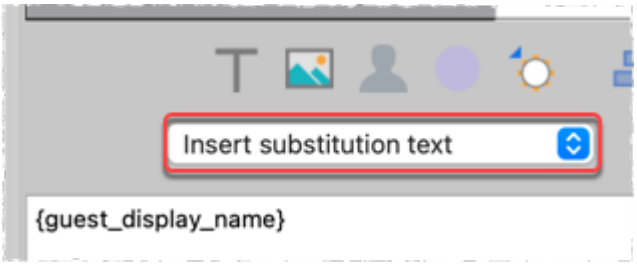
Set the number of **Guides** to 3 in the **Stationery** pane. These help to position the text. Now click on the **Add text** button. The cursor will change to a crosshair. Click on the bottom centre of the place card (as shown below).



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



Make sure the text on the card is selected and click Mirror.

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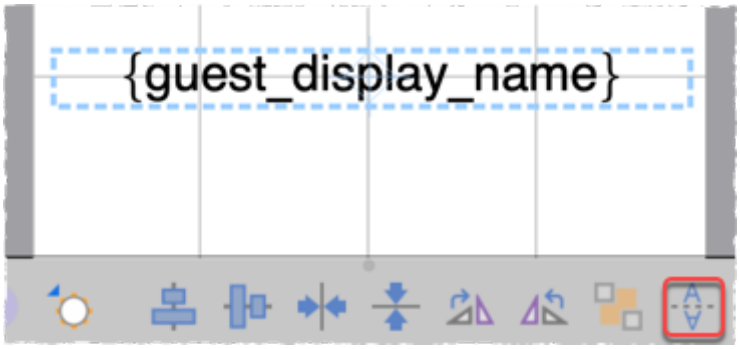

The text will be mirrored on the other side of the card.

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.

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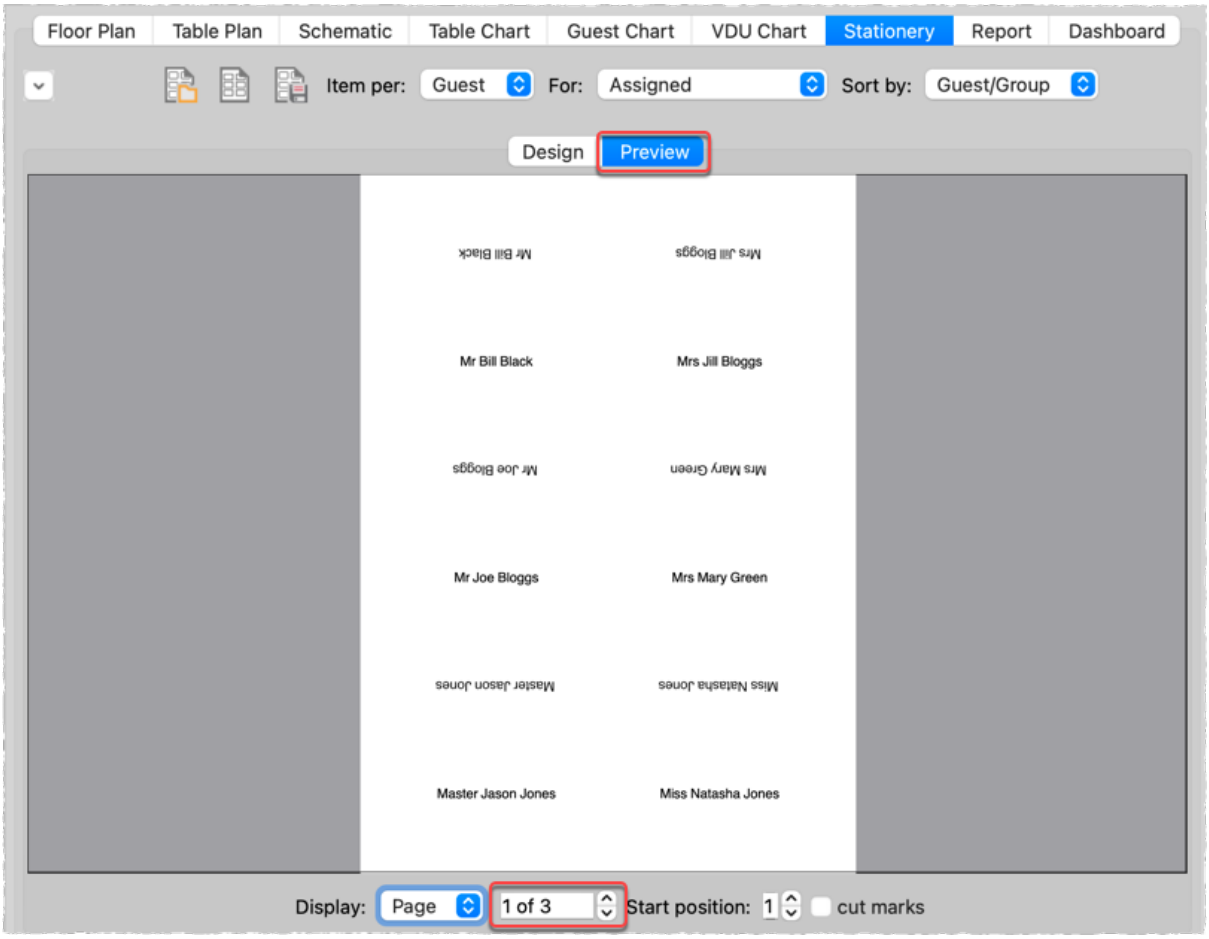
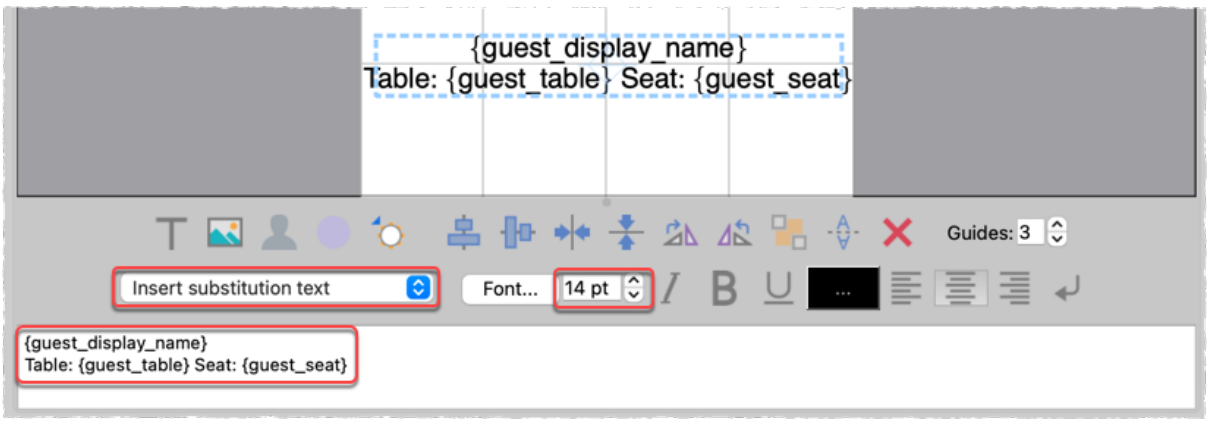


We now want to add additional text to help the staff to lay out the cards. Bring the **Design** tab back to the front. Click on the bottom text on the card and add the additional text as below by a combination of typing and using the **Insert substitution text** drop-down. Reduce the font size so the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



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

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

You can also add images, guest images, colour coded spots and personalised maps to your stationery.

Note You can order blank 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 >>

1.3.10 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 and save it:

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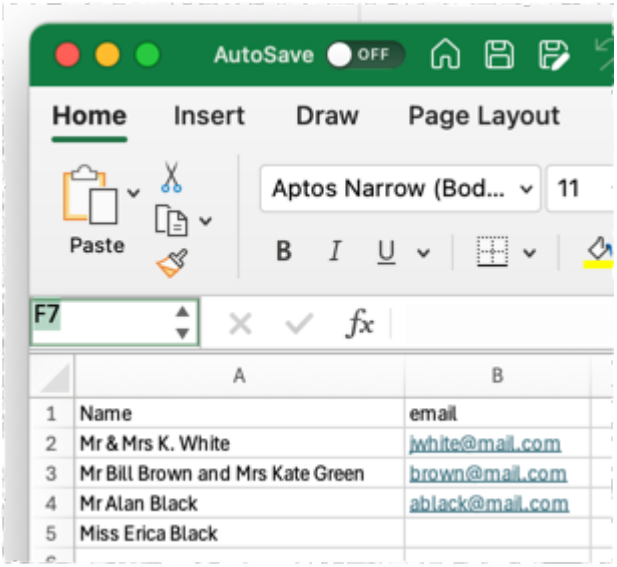
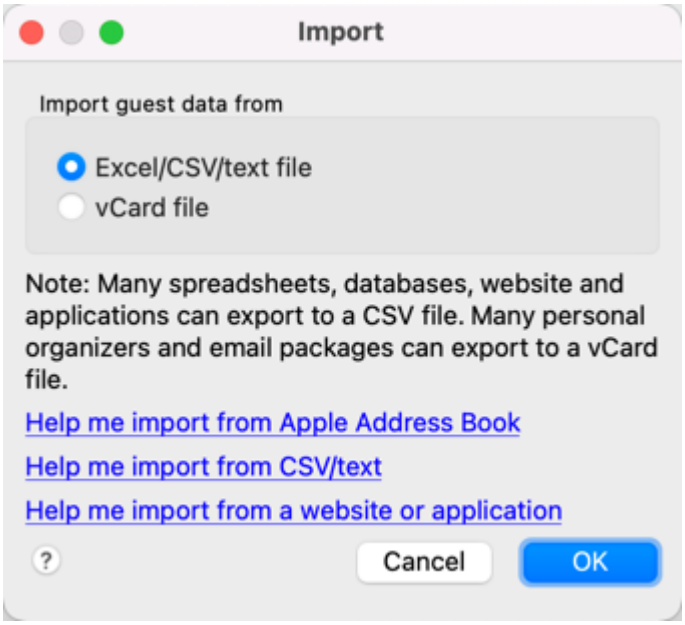


Create a new plan by selecting **File>New**.

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.

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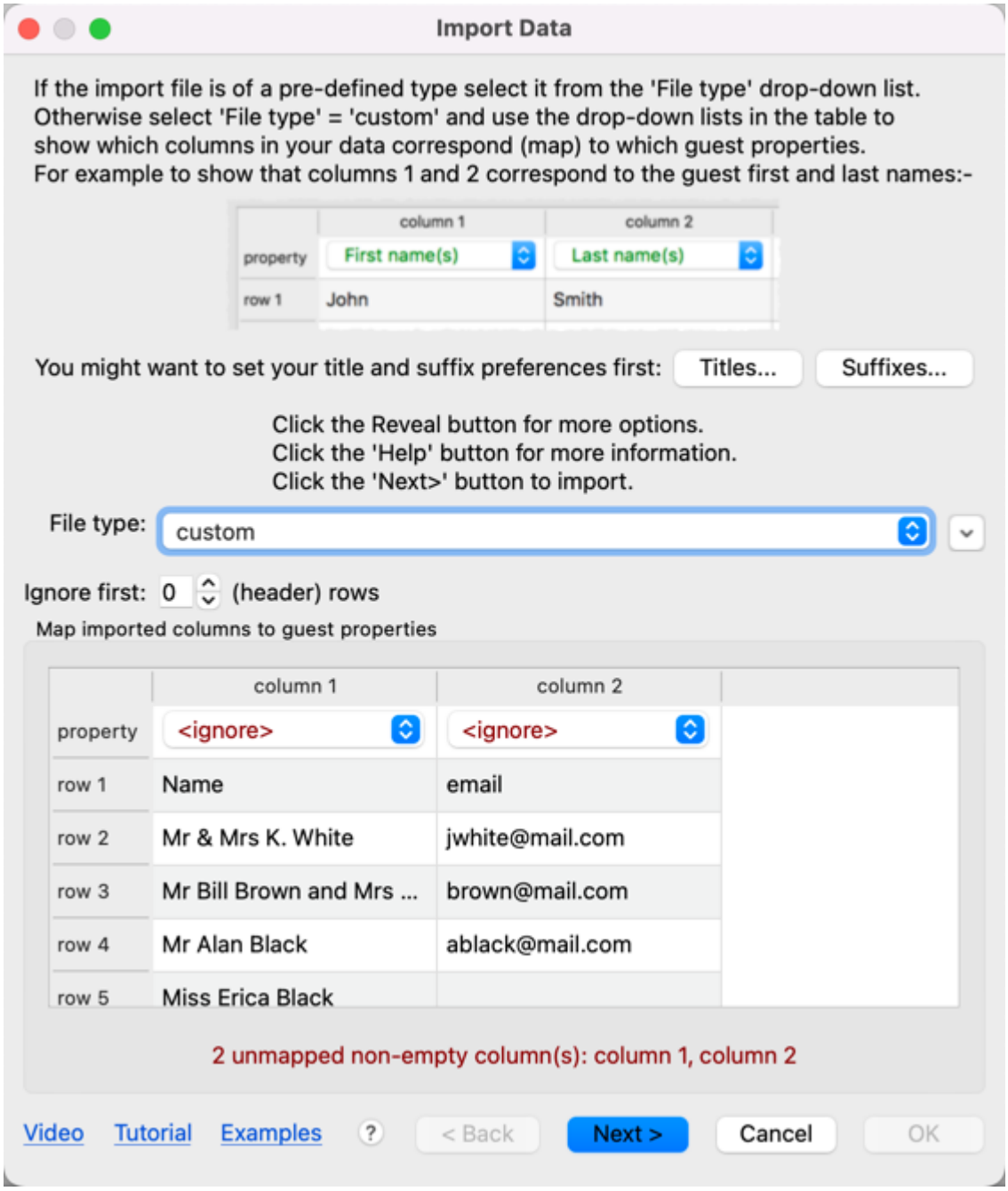

Tell PerfectTablePlan which columns correspond to which guest properties and to ignore the first row, as shown below.

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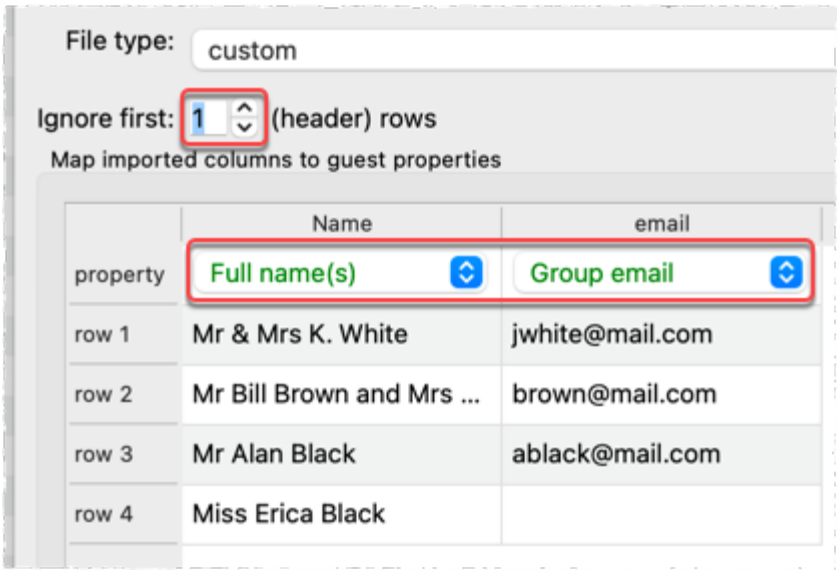
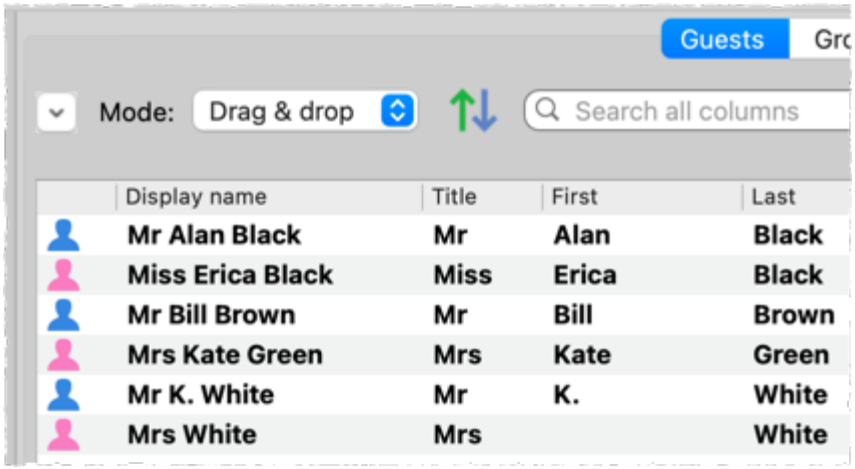


Note that you can edit the data in the table before you import it. This will not affect the original .csv file.

Click the **Next>** button (if you want to change anything you can then click **<Back**).

Click **OK**. If you are prompted to **Save this import mapping to use again?** click **Don't save**. The guests should now be imported as below.



If it has imported anything incorrectly you can easily change it in **Edit** mode or **Edit>Undo** the import.

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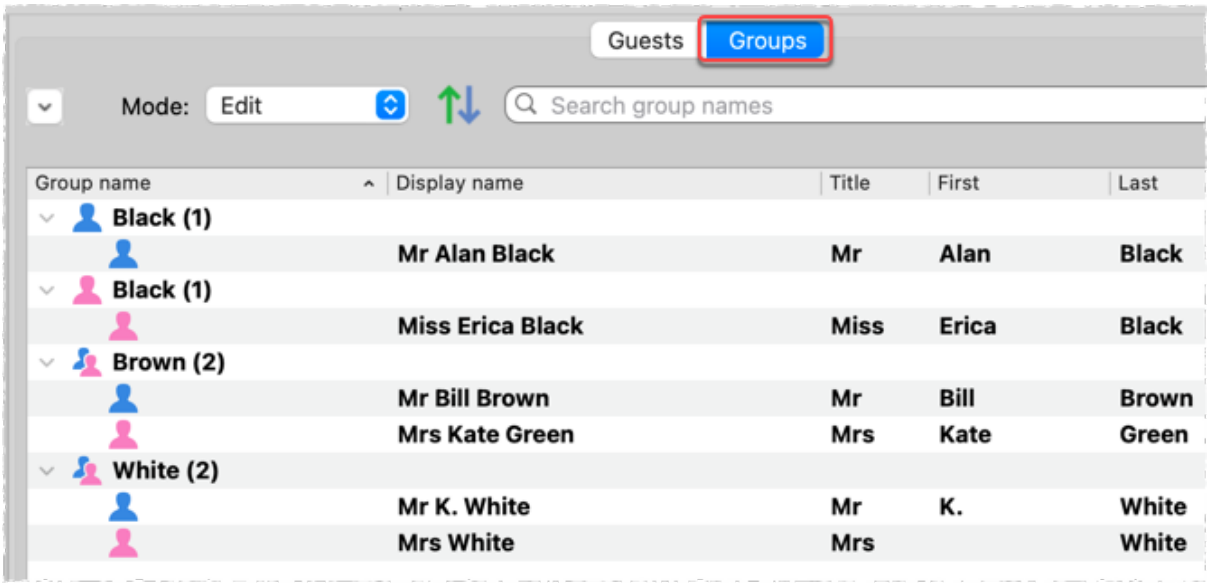
The email address has been added to the group contact information. This is shared by everyone in the group.

Click the **Groups** tab to see how guests have been placed into groups.



If you don't like how they have been grouped you can easily drag guests between groups in **Drag and drop** mode in the **Groups** pane. E.g. You can drag Miss Erica Black into the same group as Mr Alan Black.

If you look in the **Proximity** pane you will see it has set default proximities for the guests in each group according to the settings in the **Proximities** tab of the **Preferences** window.

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

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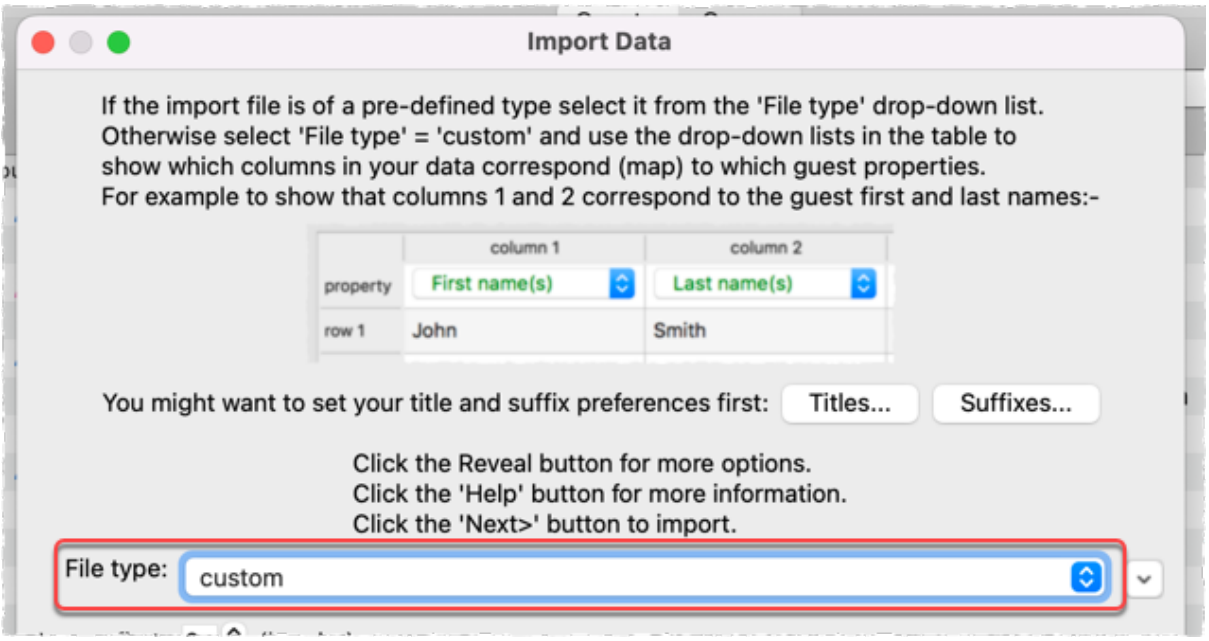
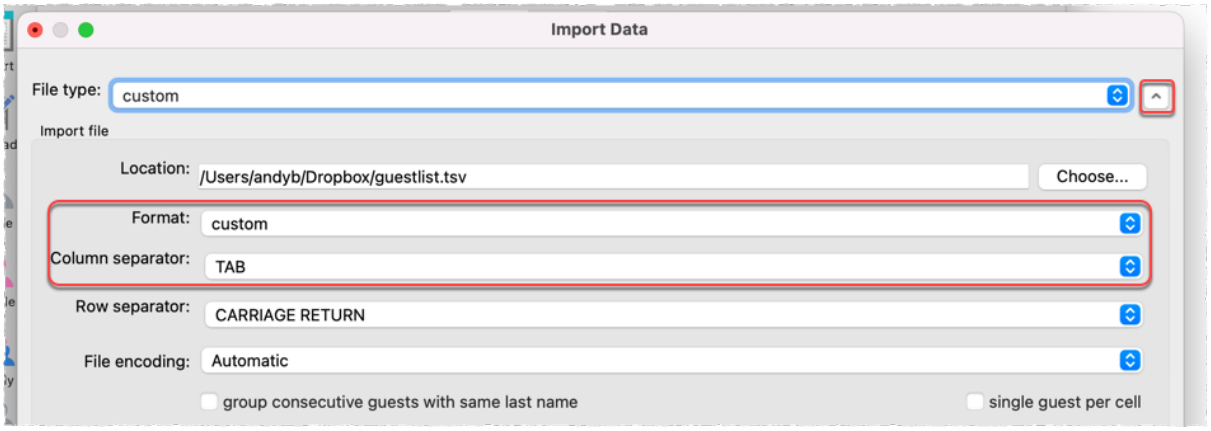


Click on the button in the **Import Data** window to show additional options. These options give you full control over how the import file is interpreted. For example you can specify that columns in the import file are separated by *Tab* characters, rather than commas:



PerfectTablePlan can import complex guest lists with multiple guests per row in one multiple columns, including addresses, meal choice, VIP status, RSVP status etc. . See example import formats for more details.

You can also import guest name data using the simpler (but less flexible) **Quick Add Guests** window.

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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.

Next: 10. Check-in guests >>

1.3.11 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.

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Guest Ids

PerfectTablePlan v7 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 by 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 fewer) 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

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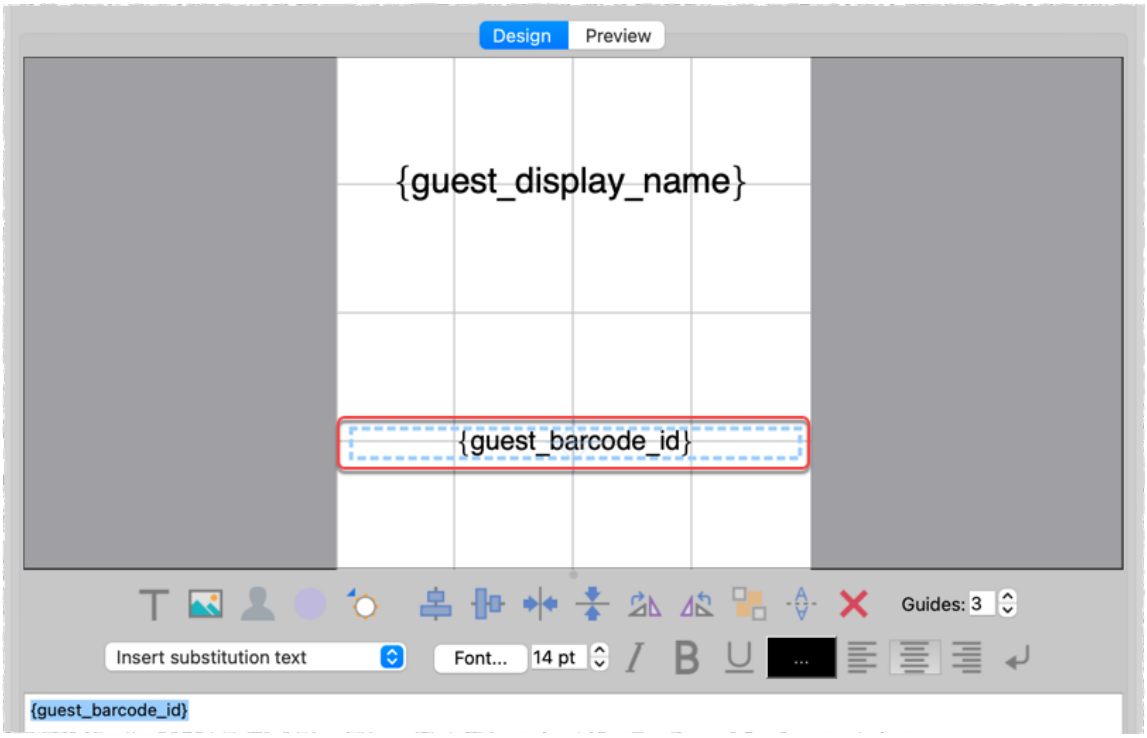
- `{group_members_barcode_ids_multi_line}` (if you are printing a stationery item per group)



Do not select **Word wrap**.

Now set the substitution text to the barcode font you have installed. 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.

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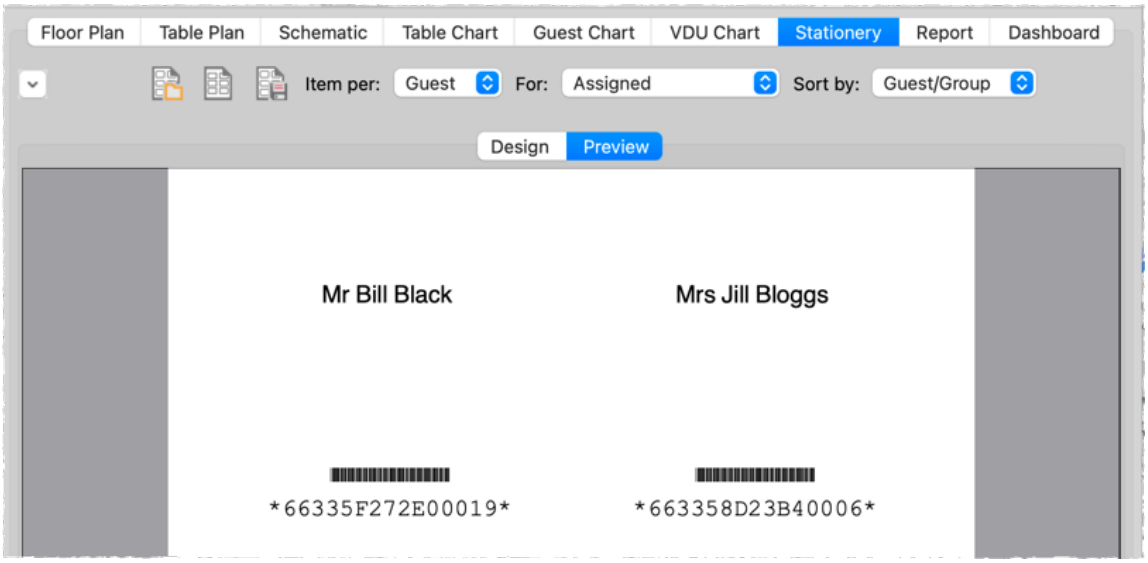
Make sure you leave some blank space around the barcode so it is easy for the scanner to read.

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.

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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 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.

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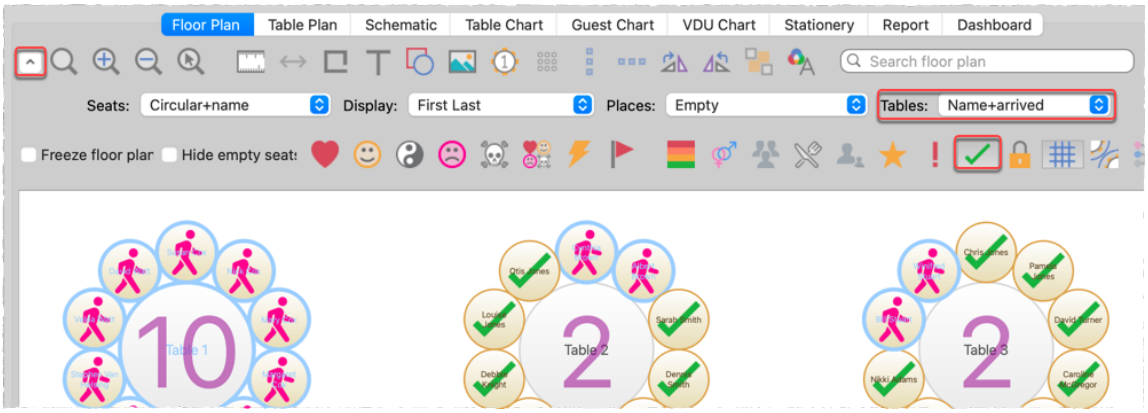
Step 4. Print your stationery

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.

Limitations

PerfectTablePlan does not support multiple users on different computers updating the same table plan at the same time. This means that you can:

1. Check-in using PerfectTablePlan on a single computer/laptop. This will allow you to easily see the total number of guests checked-in and empty seats. However, this isn't practical for large numbers of guests.

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or

2. Check-in using PerfectTablePlan on a multiple computers/laptops, each with a copy of the plan. This will allow you to check-in larger events. But it won't allow you to easily see the total number of guests checked-in or empty seats.

1.4 Editions

1.4.1 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 their own wedding reception, party or bar/bat mitzvah*	*Charity organizers, club secretaries, lodge secretaries and other frequent users*	*Professional event planners*
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	✓	✓	✓
Import guest data	✓	✓	✓

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Rectangular, Banquet, Head, Custom Circular, Semi-circular, Oval tables + rows of seats	✓	✓	✓
Add images/textures to floor plan	✓	✓	✓
Add images to stationery	✓	✓	✓
Add background image to floor plan	✗	✓	✓
E-shaped tables	✗	✓	✓
Serpentine tables (90 and 180 degrees)	✗	✓	✓
'You are here' maps in stationery	✗	✓	✓
Save import mappings	✗	✓	✓
Custom seat numbering	✗	✓	✓
Save a plan as a template	✗	✓	✓
Custom guest fields	✗	maximum 2	maximum 20
Edit VDU chart footer	✗	✗	✓
Custom automatic seat assignment	✗	✗	✓
Automatically assign multiple seatings in one operation	✗	✗	✓
Import seating data	✗	✗	✓

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Import proximity data	✗	✗	✓
Import/export record Ids	✗	✗	✓
Add barcoded Ids to stationery	✗	✗	✓
Check-in guests with a USB barcode scanner (scanner not included)	✗	✗	✓
Bulk edit proximity	✗	✗	✓
Fast table renumbering/renaming	✗	✗	✓
Fast table layout	✗	✗	✓
Merge changes during import	✗	✗	✓
Reports	summary troubleshooting	summary troubleshooting multi-plan summary/matrix/pairs/ guest seating (up to 3 plans)	summary troubleshooting multi-plan summary/matrix/pairs/ guest seating (up to 50 plans) detailed (summary) detailed (guests)
Price per user	see website		

Upgrade to a higher edition

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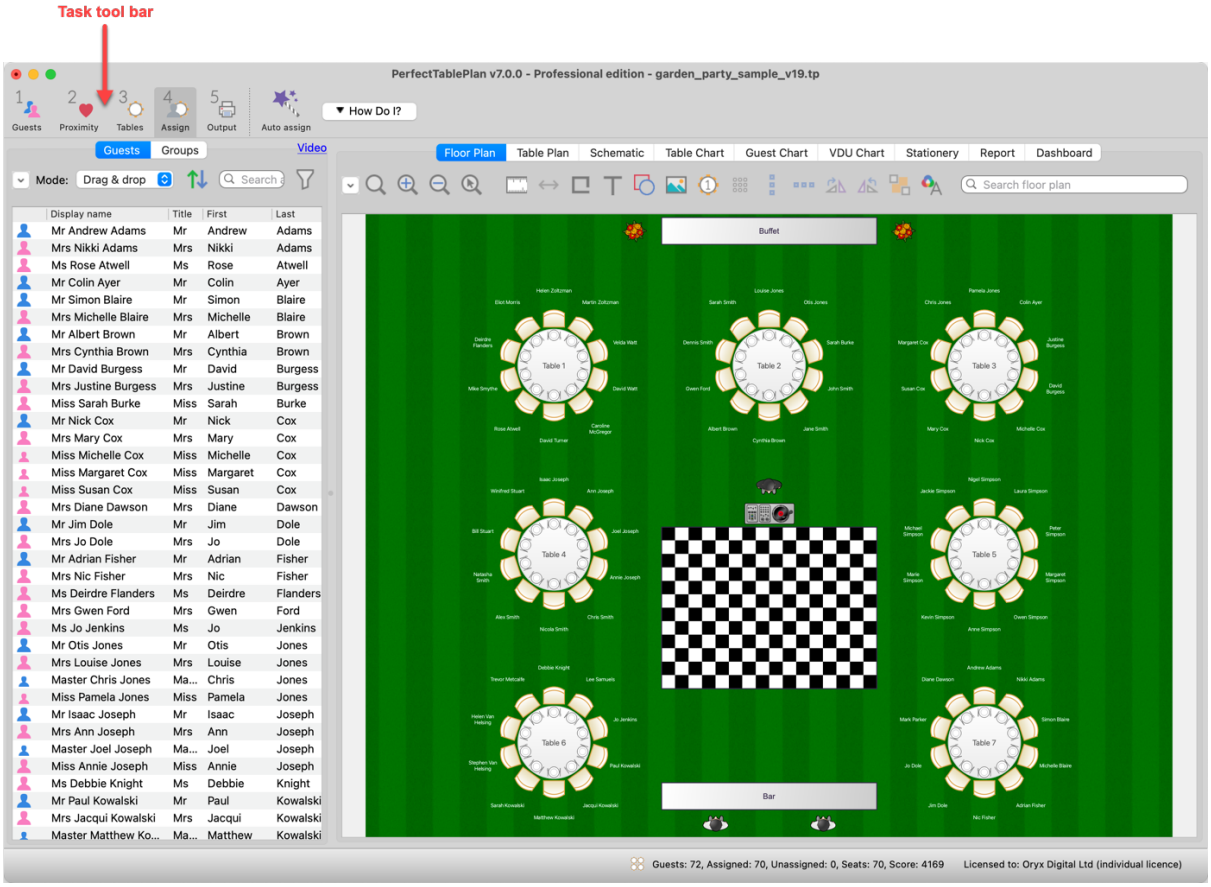
Reference

2 Reference

2.1 User interface

2.1.1 Main window



This is the main window of the application. The tool bar buttons and panes visible will depend on the button selected in the **Task** tool bar. Use the buttons at the top of the window to minimise, maximise or close it.

See also:

- **Menu** bar
- **Task** tool bar
- **Main** tool bar
- **Insert** tool bar

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- **Status** bar
- **Guests** pane
- **Groups** pane
- **Proximity** pane
- **Custom Field Proximity** pane
- **Floor Plan** pane
- **Table Plan** pane
- **Schematic** pane
- **Table Chart** pane
- **Guest Chart** pane
- **VDU Chart** pane
- **Stationery** pane
- **Report** pane
- **Dashboard** pane
- Windows
- Drag and drop
- Keyboard accelerators

2.1.2 Menu bar

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

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

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

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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 ⌘+*O*..

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.

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

2.1.4 Main tool bar

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

Note Only icons appropriate to the current task are displayed.

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You can also show the tool bar buttons for basic actions by unchecking **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
	Event Information window
	Numbers and Budget window
	Copy to clipboard contents of **Right** pane
	Show/edit properties of selected item
	Delete selected item(s)
	Automatic seat assignment
	Order poster prints and place cards
	Print

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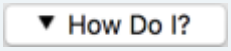
	Email plan as an attachment (not available on Mac)
	Export plan in various formats
	Show list of tasks you might need help with

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

2.1.5 Insert tool bar

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

Note 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

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	Insert E-shaped table (Advanced and Professional editions only)
	Insert rectangular table
	Insert banquet table
	Insert head table
	Insert custom table
	Insert circular table
	Insert semi-circular table
	Insert oval table
	Insert 180 degree curved table (Advanced and Professional editions only)
	Insert 90 degree curved table (Advanced and Professional editions only)
	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.

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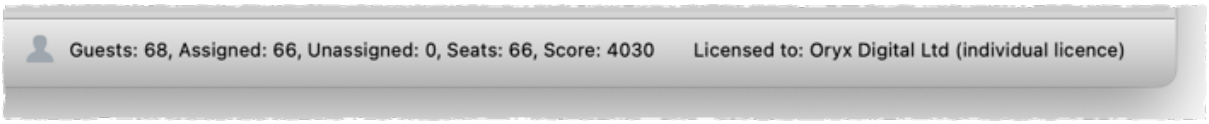
2.1.6 Status bar



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)
- numbers related to the current plan, click on the numbers to configure this in the **Status bar** tab of the **Preferences** window
- whether the software is licensed (and a **Buy now** or **Upgrade now** button, if it isn't)

2.1.7 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.

You can change the column order by dragging and dropping the columns.

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

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

Click on the button to sort the guests in a multi-level sort (e.g. by last name then first name). Alternatively click on any of the column headers (for example on **Display name**) to sort by just that column. Clicking a column again reverses the sort order.

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 one or more of their properties (case is ignored). Click the cancel icon or press the *Esc* key to clear the field. Click

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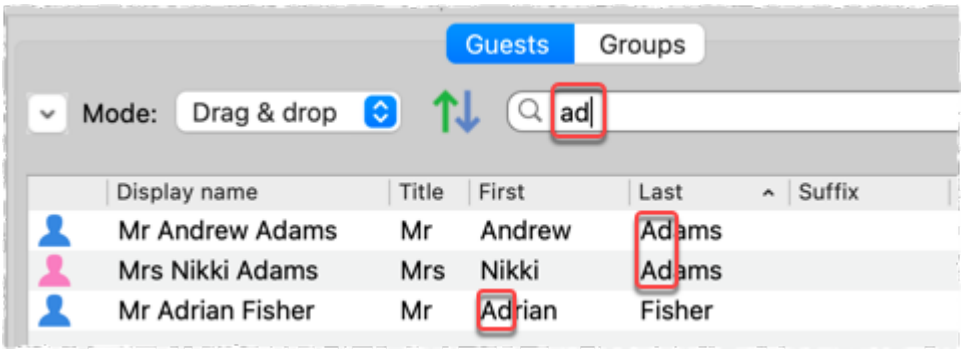
on the button to show/hide drop-down lists for filtering guests. Choose from the assignment status and RSVP status drop-down lists to hide guests with non-matching assignment and RSVP status.



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.

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

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

Drop a plan file from Mac onto this pane to open it. Drop an Excel, vCard, text or CSV file from Mac onto this pane to import it.

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

Mode

Drag & drop

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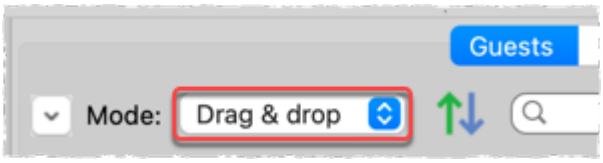

Left-click on one or more guests and drag them to a seat or table in the **Floor Plan**, **Table Plan** or **Schematic** panes to assign them to a seat. Hold down the ⇧ key to also drag all the other members of their group.

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

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

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

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

Edit

Click on a guest property to edit it.

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

See also:

- Add or remove dots at the end of titles
- Add custom fields
- Edit a property for multiple guests
- Importing guests
- Print a guest list

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2.1.8 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.

You can change the column order by dragging and dropping the columns.

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

Groups with one or more guests who have declined or cancelled are shown with ~~strikethrough~~ text. Groups with one or more guests who have not been assigned to seats are shown in **bold**. Groups with one or more 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).

Click on the button to sort the guests in a multi-level sort (e.g. by last name then first name). 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 Guests are always sorted within their group in the **Groups** pane

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.

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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.

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.

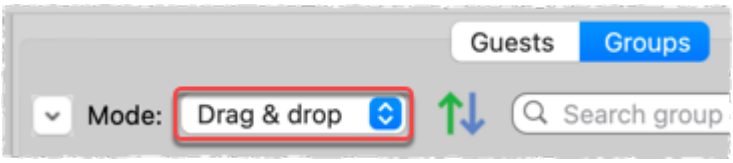
Drop a plan file from Mac onto this pane to open it. Drop an Excel, vCard, text or CSV file from Mac onto this pane to import it.

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

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

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

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

Edit

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Click on a guest or group property to edit it.

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

See also:

- Move guests from one group to another
- Insert a new guest into an existing group
- Edit a property for multiple guests
- Importing guests
- Import guests in couples/families/groups
- Print a guest list

2.1.9 Proximity pane

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

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

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

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

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

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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.

You can change the default proximities for couples, families and groups in the **Preferences** window.

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.

Select from **Columns**:

- **Show all**: show all columns.
- **Hide non-empty:** hide columns that have at least one non-neutral proximity.
- **Hide empty:** hide columns that have only neutral proximity.

Note Columns hidden by **Columns** are in addition to columns hidden by **Search column.**

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

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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.

See also:

- Bulk edit proximity (video with audio, 1:08 minutes)

See also:

- Change the proximity for multiple guests
- Proximity

2.1.10 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.

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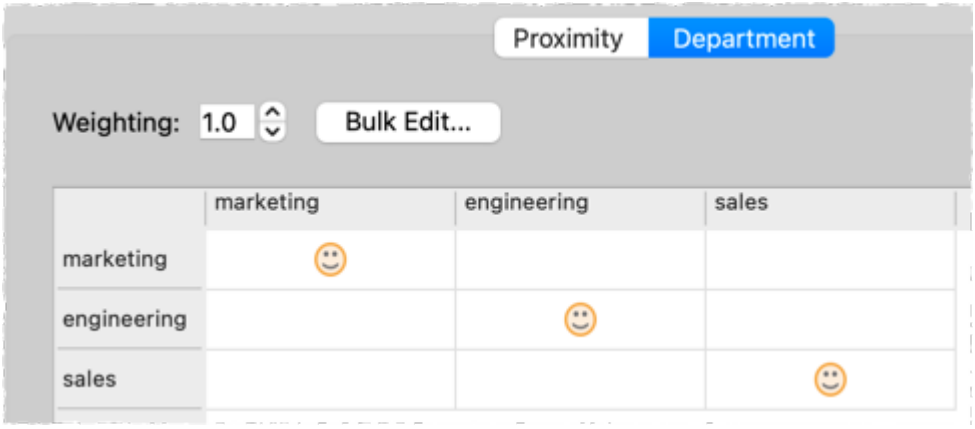

You can set multiple custom proximities at the same time. E.g. you could seat guests together (or apart) depending on their geographical area, seniority and department.

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.

If the table is large, editing it one cell at a time can be quite tedious. Click on the **Bulk Edit...** button to edit multiple cells in a single operation using the **Bulk Edit Custom Proximity** window. This button is only available for custom fields of type 'selection'.

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

See also:

- Custom proximity (video with audio, 1:04 minutes)

See also:

- Add custom fields
- Assign seating by guest type/category

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2.1.11 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

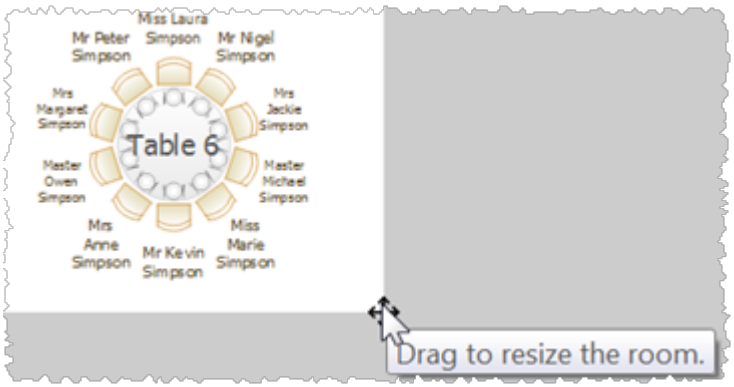
Clicking on the and buttons zooms in and out. Clicking on the button zooms and scrolls (pans) the display to show all the items in your plan. You can also use a 'pinch' gesture to zoom, if your device supports gestures. When you are zoomed in you can move around by clicking on the scroll bars or by holding 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).

You can also change the size of the floor plan by dragging the bottom-right corner.



Advanced and Professional editions only

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Click the **Scale background image** button to resize a background image to the same scale as your floor plan.

Click the **Insert Line** button to add a line or wall to the floor plan.

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 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). You can also drag an image from your operating system or web browser onto the **Floor Plan** pane.

Professional edition only

Click the **Renumber/rename table** button to quickly rename lots of tables.

Click the **Layout tables** button to layout selected tables in a grid.

Click the **Align vertical** button to align (same X position) the selected item centres under the top-most item selected.

Click the **Align horizontal** button to align (same Y position) the selected item centres right of the left-most item selected.

Click the or buttons to rotate the selected table, shape or text item 45 degrees clockwise or anti-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.

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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 **Display** 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 and guest names to be displayed.

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

Advanced and Professional editions only

Set the **Display** drop-down list to **Custom name...** to choose your own name format. This can include HTML tags and custom fields. For example:

```
{last}, {title} {f}<br><i>({position})</i>
```

Where `position` is a custom field.

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.

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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.

You can also use the keyboard arrow keys to move selected items. If grid snap is not on, you can hold down the ⇧ key to make smaller movements.

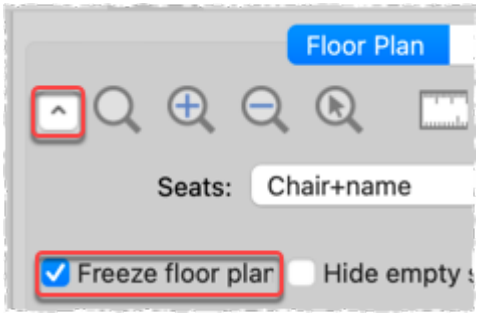
Guests can be dragged between seats or from the **Guests** pane or **Groups** pane (set the **Left** pane **Mode** to **drag & drop**). Drop a guest away from a seat or table to unassign them.

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.

Ctrl+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.

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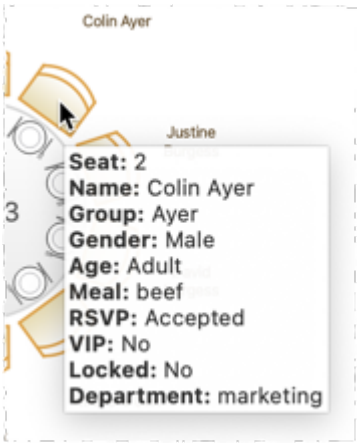
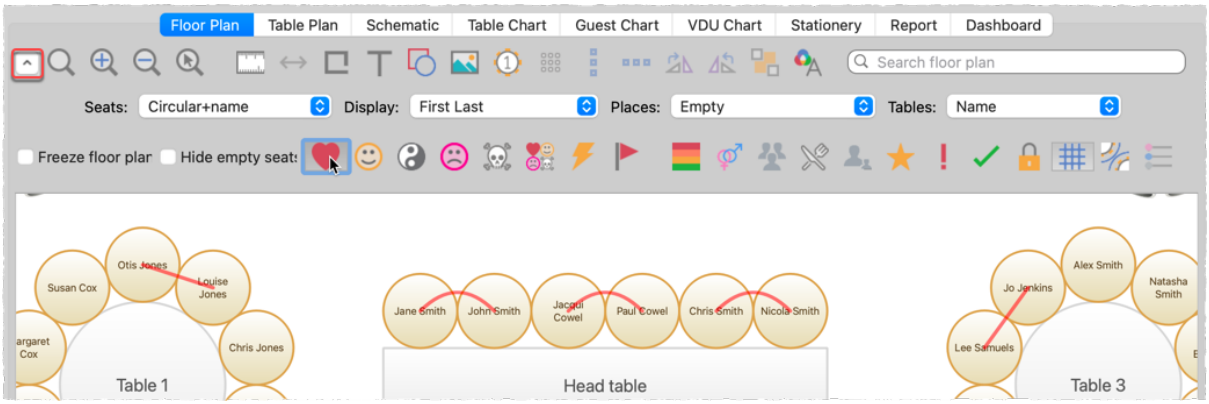
Check **Hide empty seats** to hide seats with no assigned guest (and any corresponding place settings). This makes drag and drop harder and is generally only recommended when you are printing or exporting.

Assessing your plan



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 be sitting near but not next to each other.

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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.

If you hold down the ⇧ 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.

Professional edition only

If you hold down the ⌥ key while pressing any of the above 6 buttons, custom proximities will also be shown. This can be a lot of proximities, so you may need to use it when selecting a subset of guests and also holding down the ⇧ key.

Depress the button to colour code guests according to how well seated they are based on the proximity of nearby guests; green for well seated and red for poorly seated.

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.

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"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 guides lines when you select a single floor plan item.

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

Depress the button to show a colour key when you are using to colour to visualize gender, groups, meals and custom fields.

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

Mouse wheel

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

Keyboard accelerators

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

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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**.

See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Change the size of the room
- Create a non-rectangular room
- Space tables correctly
- Space seats correctly

2.1.12 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. You can also use a 'pinch' gesture to zoom, if your device supports gestures.

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. You can also select a table from the drop-down list.

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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 and guest names to be displayed.

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

Advanced and Professional editions only

Set the **Display** drop-down list to **Custom name...** to choose your own name format. This can include HTML tags and custom fields. For example:

```
{last}, {title} {f}<br><i>({position})</i>
```

Where `position` is a custom field.

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 **Event 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.

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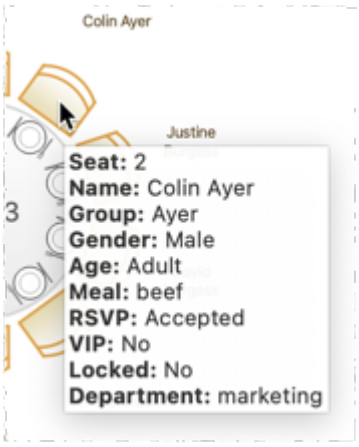
Note If you drag a guest on to a seat where another guest is already assigned, the guest will swap seat with the guest being dragged.

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

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

Check **Hide empty seats** to hide seats with no assigned guest (and any corresponding place settings). This makes drag and drop harder and is generally only recommended when you are printing or exporting.

Assessing your plan



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 be sitting near but not next 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.

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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.

If you hold down the ⇧ 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.

Professional edition only

If you hold down the ⌥ key while pressing any of the above 6 buttons, custom proximities will also be shown.

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

Depress the button to colour code guests according to how well seated they are based on the proximity of nearby guests; green for well seated and red for poorly seated.

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

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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 a colour key when you are using to colour to visualize gender, groups, meals and custom fields.

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

Keyboard accelerators

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

2.1.13 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.

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

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

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

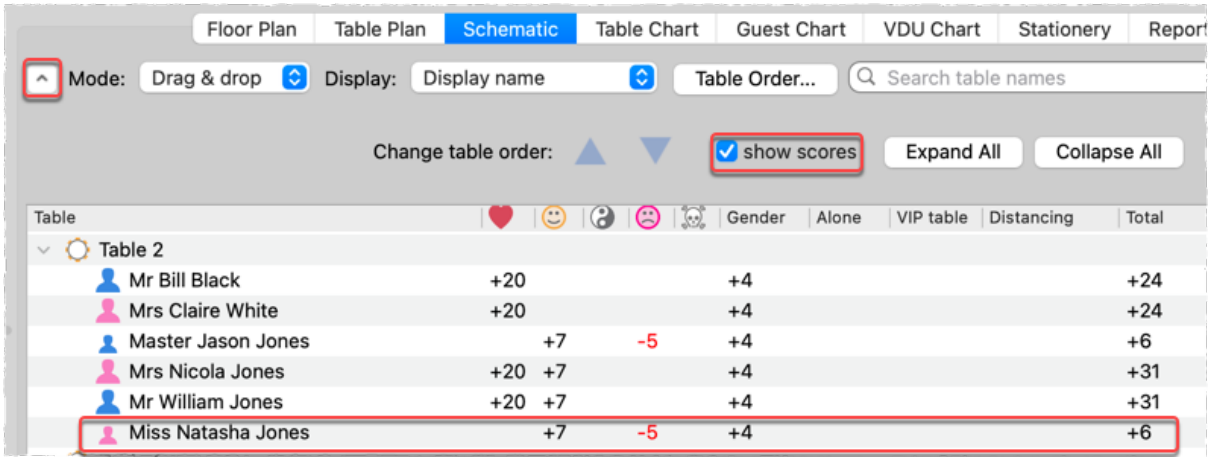
The order of the tables can be changed by clicking on the **Table order** button to display the **Table Order** window.

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

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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 ⇧ key to also drag all the other members of their group. You can also drag guests from the **Guests** pane or **Groups** pane to the **Schematic** pane.

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

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

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

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

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

Select more than one guest or table by using ⇧+click or ⌘+Click. Use ⌘+*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 ⌘+arrow keys to change row or column. Use the *Space* or *arrow down* keys to edit a drop-down list.

See also:

- Change the table order

2.1.14 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.

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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 on the button to show additional options.

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

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

The order of the tables can be changed by clicking on 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 or Numbers spreadsheets.

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

See also:

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- Change the table order
- Change the order of guests in a group

2.1.15 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. If you are displaying by group, the groups will be ordered by the last name of the first guest in each group.

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 on the button to show additional options.

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

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

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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 or Numbers spreadsheets.

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

See also:

- Print a guest list
- Change the order of guests in a group

2.1.16 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 a venue. But we strongly recommend you test this before an event to ensure that you 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:

- **Last First** to display by guest, with the last name in column 1 and first name in column 2. Ordered alphabetically by last name. Anonymous guests are not shown.
- **First Last** to display by guest, with the first name in column 1 and last name in column 2. Ordered alphabetically by last name. Anonymous guests are not shown.

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- **Display name** to display by guest, with the display name in column 1. Ordered alphabetically by last name. Anonymous guests are not shown.

- **Group** to display by group, with the group name in column 1. Ordered alphabetically by group name.

Advanced and Professional edition only

- Select custom field of type selection to display by the values of that field. Ordered alphabetically by value.

Change the **By** drop-down depending on whether you wish to show seat numbers along with the table/row.

Advanced and Professional edition only

If you have a single E-shaped table, then the name of the section (sprig) is shown instead of the table name.

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

Change the **Text** percentage to change the percentage of the space 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.

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Click on the button to show additional options.

Click the **Font** 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.

Note Large fonts can be slow to draw and cause a jerky effect.

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

Check the **contrast** check box if you want to show alternate rows in a contrast colour.

Change the **Floor plan** drop-down list to change whether the floor plan image is displayed on the left of the scrolling text or on top of the scrolling text.

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

Professional edition only

Click the **Footer...** button to add/edit footer text.

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

See also:

- VDU chart (video with audio, 2:17 minutes)
- Assign (or reassign) seats in real time
- Display seating on a VDU or plasma screen

2.1.17 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).

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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.

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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. You can also drag an image from your operating system or web browser onto the **Design** tab of the **Stationery** pane.

Click on the **Insert guest image** button to add a guest image. If **Item per** is set to **Group** or **Table** this will display all the images of the guests for the group or assigned to the table.

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 the **Horizontal centre** or **Vertical centre** buttons to horizontally/vertically centre the currently selected item.

Click the **Snap horizontal** and **Snap vertical** buttons to horizontally/vertically snap the currently selected item to the nearest guide line. At least 1 guide line must be displayed.

Click the or buttons to rotate the selected item 90 degrees clockwise or anti-clockwise.

Click the **Move to Back** button to move the selected item behind any other item.

Click the **Mirror** button to vertically mirror the currently selected item.

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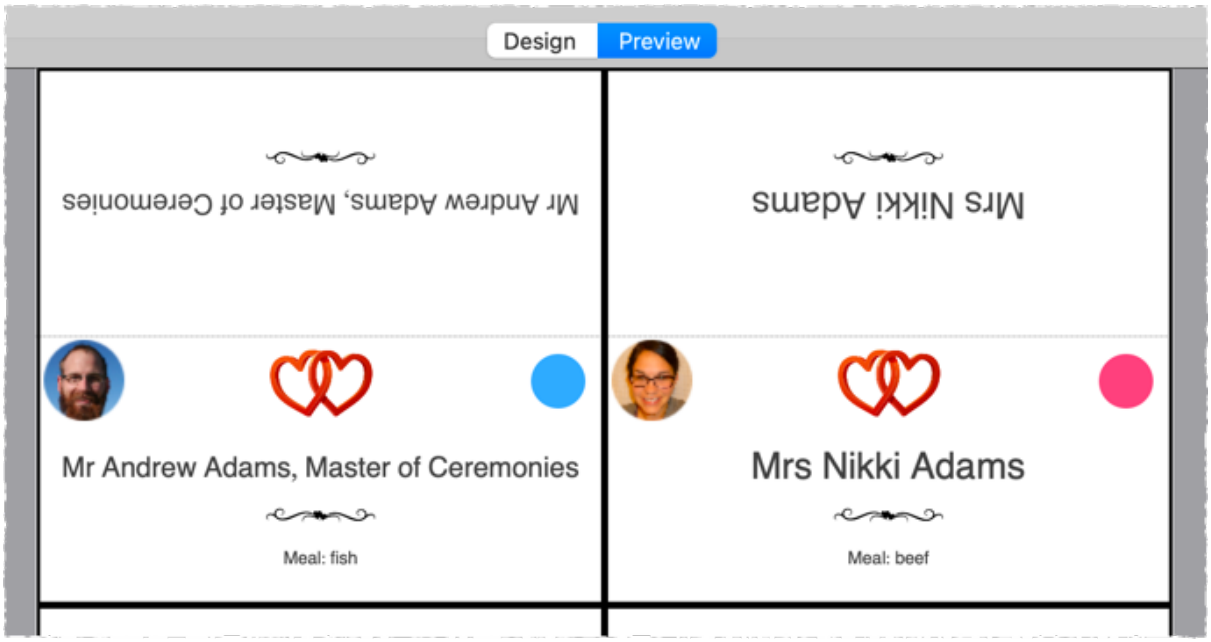
Click the **Delete** button to delete the currently selected item.

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**, **Bold** and **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.

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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 **Event Information** window	31/1/2010	Guest, group or Table
{event_name}	event name from **Event Information** window	Gala dinner	Guest, group or Table

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{event_notes}	event notes from **Event Information** window		Guest, group or Table
{event_venue}	event venue from **Event Information** window	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_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

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{group_country}	the address country	England	Guest or Group
{group_email}	group email address	email@email.com	Guest or Group
{group_home_phone}	group 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 (Professional Edition only)	*1234567890* *2345678901*	Guest or Group
{group_members_multi_line}	list of group members, one per line	Mr J Smith Mrs K Smith	Guest or Group
{group_members}	list of group members on one line	Mr & Mrs J. Smith or Mr & Mrs John Smith (depending on the setting of the **Display group members as** field in the **Names** tab of the **Preferences** window)	Guest or Group
{group_members_first}	first member of group	Mr J Smith	Guest or Group

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{group_mobile}	group 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_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_tables}	the table(s) the group is assigned to	table 1	Guest or group
{group_town_city}	the address town/city	The Town	Guest or Group
{group_work_phone}	group work phone number	111-111-1111	Guest or Group

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{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_email}	guest email address	email@email.com	Guest
{guest_first_name}	guest first name(s)	John	Guest
{guest_first_name_initials}	guest first name(s) as initials	J.	Guest
{guest_gender}	guest gender	male	Guest
{guest_home_phone}	guest home phone number	111-111-1111	Guest
{guest_last_name}	guest last name(s)	Smith	Guest
{guest_last_name_initials}	guest last name(s) as initials	S.	Guest

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{guest_meal_multi_line}	guest meal, one course per line	soup fish	Guest
{guest_meal}	guest meal	soup,fish	Guest
{guest_mobile}	guest mobile number	111-111-1111	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 Professional Editions only)	A	Guest
{guest_table}	table guest assigned to	Table 3	Guest
{guest_title}	guest title	Mr	Guest
{guest_vip}	guest VIP status	VIP	Guest

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{guest_work_phone}	guest work phone number	111-111-1111	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_guest_meals_multi_line}	list of guests and meals for table, one per line	Mr J Smith: beef Mrs K Smith: fish	Table
{table_guests_alpha_multi_line}	list of guests at table in alphabetic last name order, one guest per line	Mrs K Jones Mr J Smith	Table
{table_guests_alpha}	list of guests at table in alphabetic last name order, on one line		Table
{table_guests_multi_line}	list of guests at table in seat order, one guest per line	Mr J Smith Mrs K Jones	Table
{table_guests}	list of guests at table in seat order, on one line	Mr & Mrs J Smith	Table
{table_meals_multi_line}	list of guest meals for table,	beef x3	Table

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	one meal per line	fish x2	
{table_meals}	list of guest meals for table on one line	beef x3 + fish x2	Table
{table_name}	the name of the table	Table 1	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

The final text will:

- have any leading or trailing spaces removed
- have multiple consecutive spaces replaced with a single space

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:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Print stationery tutorial
- Merge guest names into stationery

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- Load sample stationery
- Create address labels
- Change the order of guests in a group

2.1.18 Report pane

The Σ**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	• how many guests have accepted their invitation • how many males vs females • how many of each meal have been ordered by guests	all
Troubleshooting	Identifies issues that may need attention in the current plan	• guests with 'Not near to proximity' that have been placed on a table together • tables with duplicate names • groups with no guests	all
Multi-plan (summary)	Shows where guests were seated across multiple plans in a textual form	• which events Mr John Smith attended and who he sat next to at each event • any guests without 'near to' or 'next to' proximity who have sat next to each other at 2 or more events	Advanced (up to 3 plans) and Professional (up to 50 plans)

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Multi-plan (pairs)	Shows how guest pairs were seated across multiple plans in a tabular form	• checking how often pairs of guests were sat next to each other or at the same table across multiple events	Advanced (up to 3 plans) and Professional (up to 50 plans)
Multi-plan (matrix)	Shows how guests were seated relative to other guests across multiple plans in a tabular form	• checking for guests sat next to each other at more than one event	Advanced (up to 3 plans) and Professional (up to 50 plans)
Multi-plan (guest seating)	Shows where guests were seated across multiple plans in a tabular form	• giving to people attending networking events	Advanced (up to 3 plans) and Professional (up to 50 plans)
Detailed (summary)	A detailed summary of a particular aspect of the current plan	• how many guests ordered each meal by table • total of 'amount owing' custom field by group	Professional
Detailed (guests)	Similar to a **Detailed (summary)** report, but also lists guest names	• which guests ordered each meal by table • the names of guests listed by special requirement and table	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.

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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 or Numbers spreadsheets.

Summary report

The summary report gives overall statistics for your plan.

Troubleshooting report

The trouble shooting report checks for the following 47 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 adjacent seats and 'near to' means seated 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

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	the number of duplicates is shown in brackets	
Guests without titles		if ≥75% of guests have titles
Guests without first names		if ≥75% of guests have first names
Guests without last names		if ≥75% of guests have last names
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 ≥75% of guests have defined genders
Guests without a guest or group phone number		if ≥75% of guests have at least 1 guest or group phone number (work, home or mobile)
Guests without a guest or group email		if ≥75% of guests have a guest or group email
Guests with unset RSVP		if ≥75% of guests have RSVP set
RSVP Declined/Cancelled guests assigned to seats		always

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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 ≥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 seated near but not next to each other	unassigned guests are ignored	always
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

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Guests with all 'Next to' and 'Near to' proximities unfulfilled	guest has at least 1 'Next to' or 'Near to' proximity set but none of these proximities are satisfied the number of 'next to' and 'near to' proximities unfulfilled is shown in brackets unassigned guests are ignored	always
Guests with all 'Next to' proximities unfulfilled	guest has at least 1 'Next to' proximity set but none of these proximities are satisfied the number of 'next to' proximities unfulfilled is shown in brackets not shown if displayed in "All 'Next to' and 'Near to' Proximities unfulfilled" unassigned guests are ignored	always
Guests with no proximity	unassigned guests are ignored	if ≥75% of assigned guests have proximities set
Guests with >2 'Next to' proximities	a guest can only sit next to a maximum of 2 other guests unassigned guests are ignored	always

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Guests with >n 'Next to' and 'Near to' proximities	if the biggest table is 10 seats then a guest can only sit next to or near to a maximum of 9 other guests unassigned guests are ignored	if there is at least 1 table
Duplicate group names	case insensitive the number of duplicates is shown in brackets	always
Groups with no members		always
Groups with anonymous members	the number of anonymous members is shown in brackets	always
Groups on more than one table	the tables are shown in brackets	always
Groups with incomplete contact details	groups with the 'Address 1' or 'City' contact fields not set	if ≥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 ≥75% of tables have no empty seats

See also:

- Troubleshooting report (video with audio, 1:10 minutes)

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Advanced and Professional editions only

Multi-plan reports

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).

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.

Click **Go** to create the report.

Multi-plan (summary) report

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

Multi-plan (pairs) report

Set **Show guests sat** depending on whether you are interested in guests sat at the same table (table section for E-shaped tables) or just guests sat next to/opposite each other.

Set the **times** value to set the threshold for how many times a pairing has to occur before it is displayed. For example, to show guests that are sat on the same table more than once, set **Show guests sat** to **same table/section** and **times** to **>1**.

Proximity is shown by colour (see the key in the report). Potential problems are highlighted in yellow, the greater the issue the darker the yellow.

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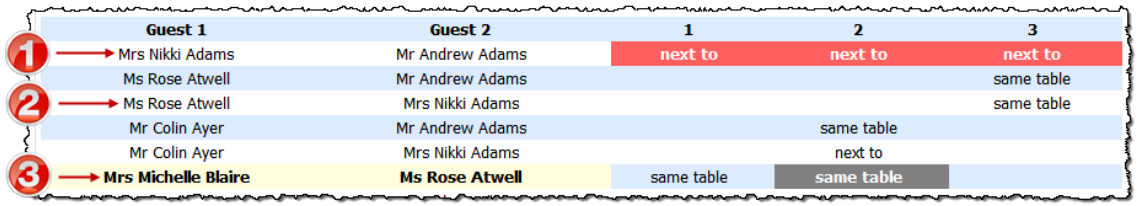

	Guest 1	Guest 2	1	2	3
1	Mrs Nikki Adams	Mr Andrew Adams	next to	next to	next to
	Ms Rose Atwell	Mr Andrew Adams			same table
2	Ms Rose Atwell	Mrs Nikki Adams			same table
	Mr Colin Ayer	Mr Andrew Adams		same table	
	Mr Colin Ayer	Mrs Nikki Adams		next to	
3	**Mrs Michelle Blaire**	**Ms Rose Atwell**	same table	same table	

In the above example we can see that:

1. Mr Andrew Adams and Mrs Nikki Adams were seated next to each other in seatings 1,2 and 3. The proximity for all 3 seatings was 'Next to' (denoted by the red background colour).

2. Mrs Rose Atwell sat on the same table as (but not next to or opposite) Mrs Nikki Adams for seating 3. Their proximity was neutral.

3. Mrs Michelle Blaire was sat at the same table as (but not next to or opposite) Mrs Rose Atwell for seatings 1 and 2. The proximity for seating 2 was 'Not next to' (denoted by the grey background colour). The yellow background colour of the cell shows that there is a potential issue (guests with 'Not next to' proximity sat at the same table).

Multi-plan (matrix) report

Set **Show guests sat** depending on whether you are interested in guests sat at the same table (table section for E-shaped tables) or just guests sat next to/opposite each other.

Proximity is shown by colour (see the key in the report). Potential problems are highlighted in yellow, the greater the issue the darker the yellow.

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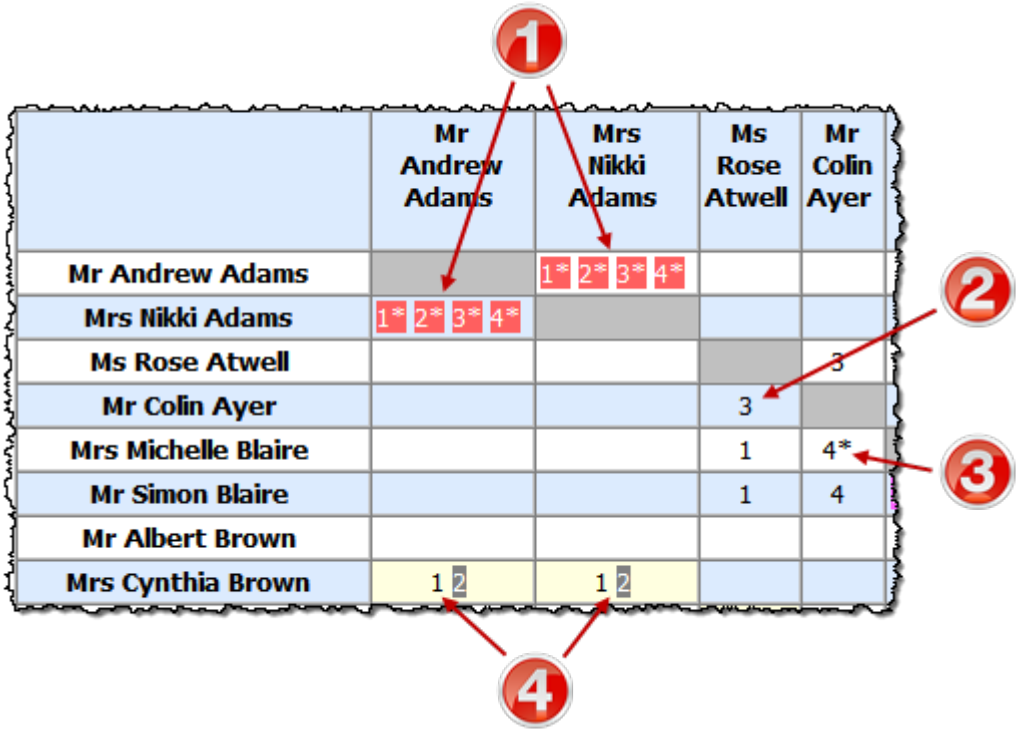

	Mr Andrew Adams	Mrs Nikki Adams	Ms Rose Atwell	Mr Colin Ayer
Mr Andrew Adams		1* 2* 3* 4*		
Mrs Nikki Adams	1* 2* 3* 4*			
Ms Rose Atwell				3
Mr Colin Ayer			3	
Mrs Michelle Blaire			1	4*
Mr Simon Blaire			1	4
Mr Albert Brown				
Mrs Cynthia Brown	1 2	1 2		

In the above example we can see that:

1. Mr Andrew Adams and Mrs Nikki Adams were seated next to (denoted by a '*') each other in seatings 1,2,3 and 4. The proximity for all 4 seatings was 'Next to' (denoted by the red colour).

2. Mrs Rose Atwell sat on the same table as (but not next to or opposite) Mr Colin Ayer for seating 3. Their proximity was neutral.

3. Mrs Michelle Blaire sat next to or opposite Mr Colin Ayer for seating 4. Their proximity was neutral.

4. Mrs Cynthia Brown was sat at the same table as (but not next to or opposite) Mr Andrew Adams and Mrs Nikki Adams for seatings 1 and 2. The proximity for seating 2 was 'Not next to' (denoted by the grey colour). The yellow colour of the cell shows that there is a potential issue (guests with 'Not next to' proximity sat at the same table).

Multi-plan (guest seating) report

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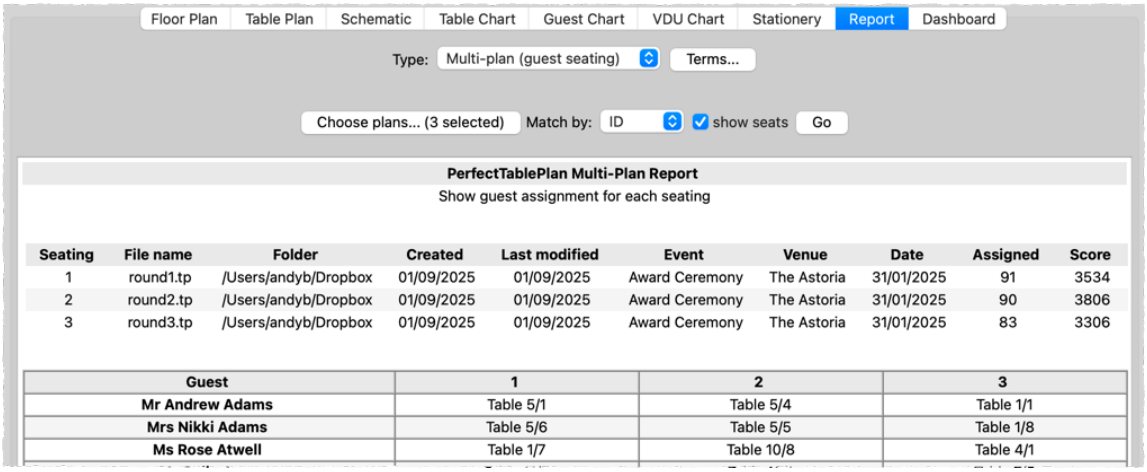
Set **Show seats** if you want to show seats as well as tables.



Seating	File name	Folder	Created	Last modified	Event	Venue	Date	Assigned	Score
1	round1.tp	/Users/andyb/Dropbox	01/09/2025	01/09/2025	Award Ceremony	The Astoria	31/01/2025	91	3534
2	round2.tp	/Users/andyb/Dropbox	01/09/2025	01/09/2025	Award Ceremony	The Astoria	31/01/2025	90	3806
3	round3.tp	/Users/andyb/Dropbox	01/09/2025	01/09/2025	Award Ceremony	The Astoria	31/01/2025	83	3306

Guest	1	2	3
Mr Andrew Adams	Table 5/1	Table 5/4	Table 1/1
Mrs Nikki Adams	Table 5/6	Table 5/5	Table 1/8
Ms Rose Atwell	Table 1/7	Table 10/8	Table 4/1

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'.

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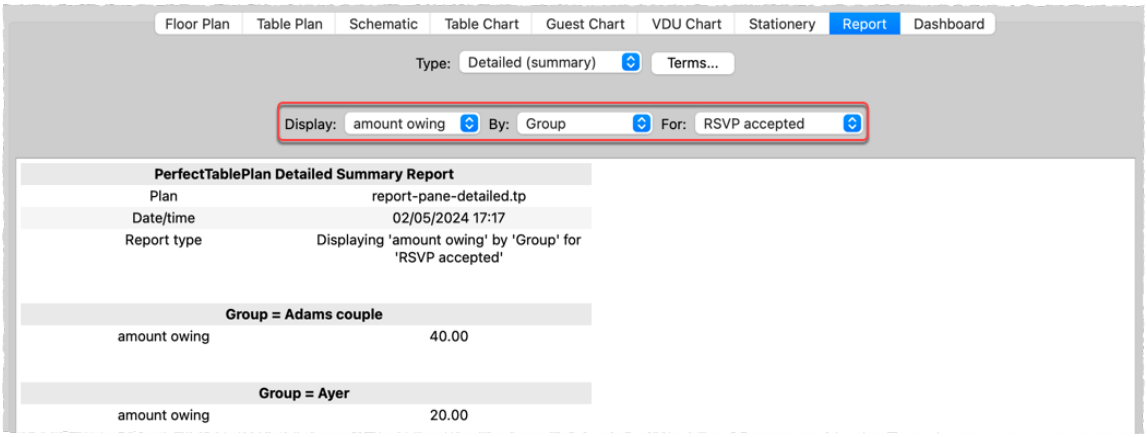

See also:

- Detailed reports (video with audio, 0:40 minutes)

2.1.19 Dashboard pane

The **Dashboard** pane shows a quick visual overview of the state of your plan.

Set **Chart type** depending on whether you prefer **Donut** or **Pie** charts.

Set **Legend** depending on how you want the legend (colour key) displayed.

Set **Columns** according to how many charts you want displayed across the pane.

Click on the button to show additional options.

You can check which charts you want to display. There are 8 standard charts:

Chart	Meaning
Guests Assigned	Guests with seats assigned or unassigned.
Seats Assigned	Seats with guests assigned or unassigned.

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Tables/Rows Filled	The tables and seat rows with either all seats filled or not all seats filled.
All RSVP	The RSVP statuses of all guests.
Unassigned RSVP	The RSVP statuses of guests not assigned to seats.
Assigned RSVP	The RSVP statuses of guests assigned to seats.
Gender	All guests by gender.
Age	All guests by age.

Advanced and Professional edition only

Custom fields of type **Selection** or **Yes/No** can be displayed in this pane.

Click on the **Colours...** button to change the colours used to denote gender or custom fields.

Click on the **Terms...** button to change the words used inside the pane.

You can copy the **Dashboard** pane to the clipboard using **Edit>Copy** and print it using **File>Print**.

Export the dashboard using **File>Export>dashboard to PDF/PNG/JPG/BMP file**.

2.1.20 Windows

2.1.20.1 Windows

Help on the following windows is available:

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About window

Auto Assign Multiple Seatings window

Bulk Edit Custom Proximity 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

Edit Table Colour window

Edit Table Seats window

Edit Table Size window

Event Information window

Export window

Export Data window

Export PDF window

Export VCard window

Find Plan Files window

Fonts and Colours window

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Group Properties window

Guest Properties window

Image Properties window

Import window

Import Data 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

Multi-Level Sort window

Numbers and Budget window

Page Setup window

Preferences window

Print window

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Print Setup window

Quick Add Guests window

Renumber/Rename tables window

Replace Text window

Save Stationery Layout window

Select Gradient window

Select Groups window

Select Guests window

Select Texture window

Shape Properties window

Shuffle Seats window

Show Guest Details window

Split Columns window

Stationery Layout window

Table Layout window

Table Order window

Table Properties window

Table Section Properties window

Text Properties window

Visualization colours window

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2.1.20.2 About window

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

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

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

2.1.20.3 Auto Assign Multiple Seatings window

Professional edition only

The **Auto Assign Multiple Seatings** window allows you to assign multiple seating in a single operation. It is particularly useful for events where you want to sit different guests together for consecutive seatings, e.g. a business networking dinner. To display this window select **File>Auto Assign Multiple...** .

Set **Number of seatings** to the number of seating plans you wish to create.

Set **New plans folder** to the folder you wish the new plans to be created in (one for each seating). Check **prompt before overwriting** if you wish to confirm overwriting any files with the same name. **New plan files** shows the names of the files that will be created.

Auto assign shows the settings that will be applied to the automatic seat assignment for each seating. Click the **Change...** button if you wish to change them.

Set the **After each seating** drop-down list according to how you want guest proximity to change after each seating.

Set the **On completion** drop-down list according to which multi-plan report you wish to show on completion.

Notes:

- A new plan file is created for each seating.

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- When the proximities are changed after each seating it will only make a proximity 'worse'. E.g. it will change 'Not next to' 'Not near to', but not vice versa.'
- You can set up additional constraints using custom proximities. These are remain unchanged between seatings.
- You can edit the plans created 'by hand' (e.g. to unassign a guest who couldn't make a particular seating) and re-run the multi-plan report.

See also:

- Arrange multiple seatings for an event

2.1.20.4 Bulk Edit Custom Proximity window

Professional edition only

The **Bulk Edit Custom Proximity** window allows you to change large numbers of cells in the **Custom Field Proximity** pane in a single operation. To display this window Click on the **Bulk Edit...** button at the top of the **Custom Field Proximity** pane.

For example, if you have a custom field 'State' with 50 possible values (Alabama, Alaska, Arizona ... etc), and you want to set custom proximity so that people from the same State sit 'near to' each other, you will have to set all 50 diagonal cells to 'near to'. This is tedious to do one cell at a time. However you can use this window to do it in a single operation by setting **Change cells** to **Diagonal, With proximity** to **Any** and **To proximity** to **Near to**.

Set the **Change cells** drop-down list according to which cells you want to change. Typically this will be the diagonal cells (i.e. where 2 guests have the same value for a custom field).

Set the **With proximity** drop-down list according to which proximity values you want to change. For example, you might only want to change

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proximities that are currently neutral so that you don't change cells that you have previous changed.

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

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

This window is only available for custom fields of type 'selection'.

See also:

- Add custom fields
- Assign seating by guest type/category

2.1.20.5 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

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proximities that are currently neutral so that you don't overwrite existing proximities.

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

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

See also:

- Bulk edit (video with audio, 1:08 minutes)

2.1.20.6 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.

2.1.20.7 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.

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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 in the footer!

2.1.20.8 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. From the adjacent drop-down list you can choose whether to show **All** details or **Selected...** details.

Check **show guest image** if you want to show the guest image 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.

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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 chose this window.

See also:

- Checking-in guests
- Check-in guests tutorial
- Assigning (or reassigning) seats in real time

2.1.20.9 Choose Plans window

Advanced and Professional editions only

The **Choose plans** window allows you to choose plans for the **Multi-plan** reports in the Σ**Report** 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.

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Check/uncheck **include current plan** to include or exclude the current plan. it will use the version in memory (including any unsaved changes) rather than the version last saved to disk.

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

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

Click **Up** to move the selected plans(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.

2.1.20.10 Custom Fields window

Advanced and Professional editions only

The **Custom 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 **Del** to delete the selected custom fields.

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

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

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

The properties of each custom field are:

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

The types of custom field are:

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

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See also:

- Custom fields

2.1.20.11 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.

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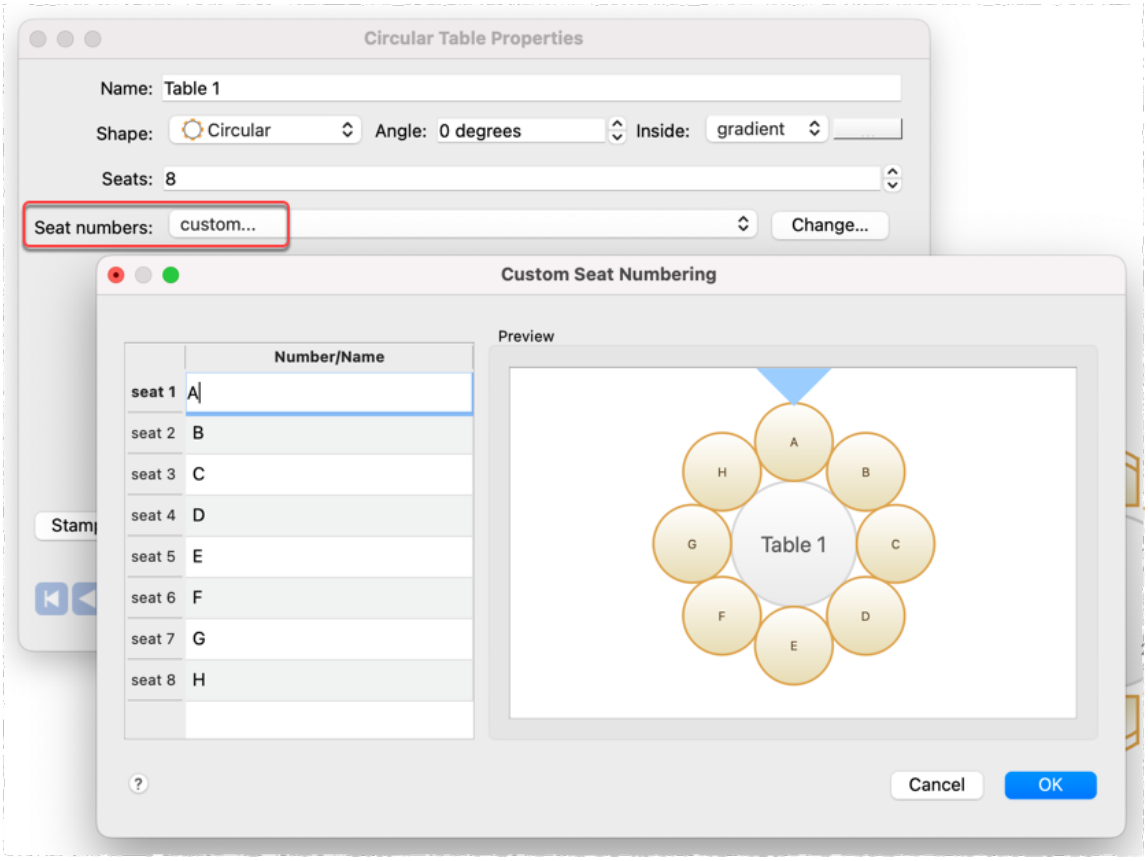

Click **OK** to accept the changes. Click **Cancel** to discard the changes.

See also:

- Change the seat numbering
- Rename/renumber tables

2.1.20.12 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).

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Area is **across** x **down**, in m^2 or ft^2 (depending on your choice of units).

Area per guest is the amount of area per guest, in m^2 or ft^2 (depending on your choice of units).

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

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

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

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

Check **Draw grid** if you would like a visible grid to be drawn in the **Floor Plan** pane. If checked you can set the drawn grid **Size** in the chosen units. 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.

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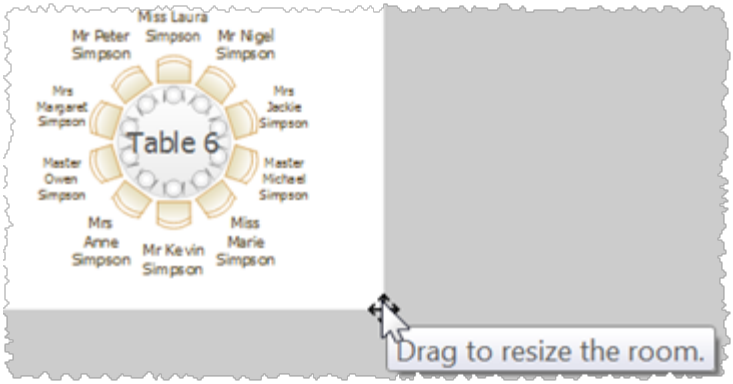
Check **Snap to grid** if you would like the centres of items in the **Floor Plan** pane to be constrained to a grid. If checked you can set the snap to grid **Size** in the chosen units. If you turn **Snap to grid** on or change the snap grid **Size**, you will be given the option to snap all tables,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

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

You can also re-size the floor plan by dragging the bottom right corner.



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.

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scaled floor plan image

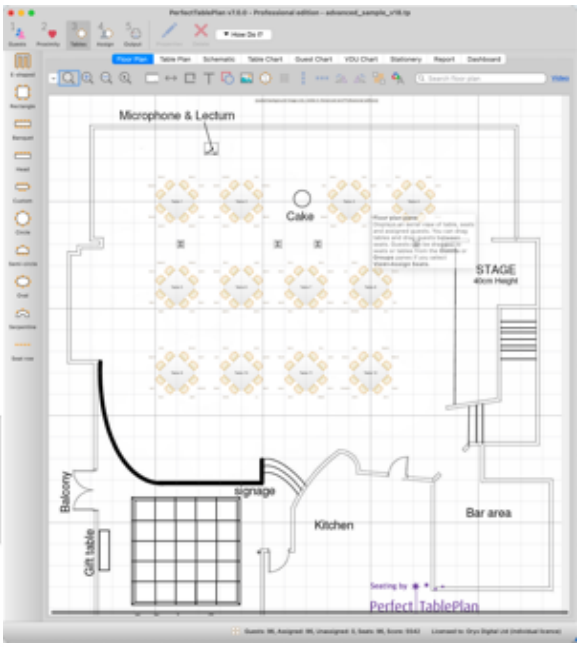

image used as floor plan background with tables added

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

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

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

Use background image scaling to correctly scale the image.

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

Note A very large image may cause your plan to be slow to load, draw and save. You can use a graphics package such as Adobe Photoshop to resize

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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:

- Create a floor plan (video with audio, 10:27 minutes)
- Space tables correctly
- Use an image of the venue

2.1.20.13 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

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2.1.20.14 Edit Table Colour window

The **Edit Table Colour** window allows you to change the inside (fill) colour for multiple tables in a single operation. To display this window select the tables you wish to edit in the **Floor plan**, **Table plan** or **Schematic** panes and then select **Edit>Table Property>Colour...**.

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.

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

See also:

- Edit a property for multiple tables
- Set transparent as colour

2.1.20.15 Edit Table Seats window

The **Edit Table Seats** window allows you to change the number of seats for multiple tables in a single operation. To display this window select the tables you wish to edit in the **Floor plan**, **Table plan** or **Schematic** panes and then select **Edit>Table Property>Seats...**.

Note All of the selected tables must be of the same shape. You can set them to the same shape using **Edit>Table Property>Shape.** You cannot remove seats with locked guests.

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

Advanced and Professional editions only

You cannot change the number of seats for an E-shaped table this way. Double-click on the E-shaped table and click on the **Sections** button.

See also:

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- Edit a property for multiple tables

2.1.20.16 Edit Table Size window

The **Edit Table Size** window allows you to change the size of multiple tables in a single operation. To display this window select the tables you wish to edit in the **Floor plan**, **Table plan** or **Schematic** panes and then select **Edit>Table Property>Size...**.

Note All of the selected tables must be of the same shape. You can set them to the same shape using **Edit>Table Property>Shape.**

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

Advanced and Professional editions only

You cannot change the size of an E-shaped table this way. Double-click on the E-shaped table and click on the **Sections** button.

See also:

- Edit a property for multiple tables

2.1.20.17 Event Information window

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

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

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

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

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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.

2.1.20.18 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 Mac.

Check **display the folder containing the document** to display the folder exported to in

2.1.20.19 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 Excel/CSV/delimited 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.

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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 Excel, CSV or a delimited text format (e.g. fields separated by *Tab* characters). If you are using **delimited text** format, set **Field separator** and **Record separator** to the field and record separators you want in the export file.

Note Excel, Numbers 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 **Choose...** 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

2.1.20.20 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.

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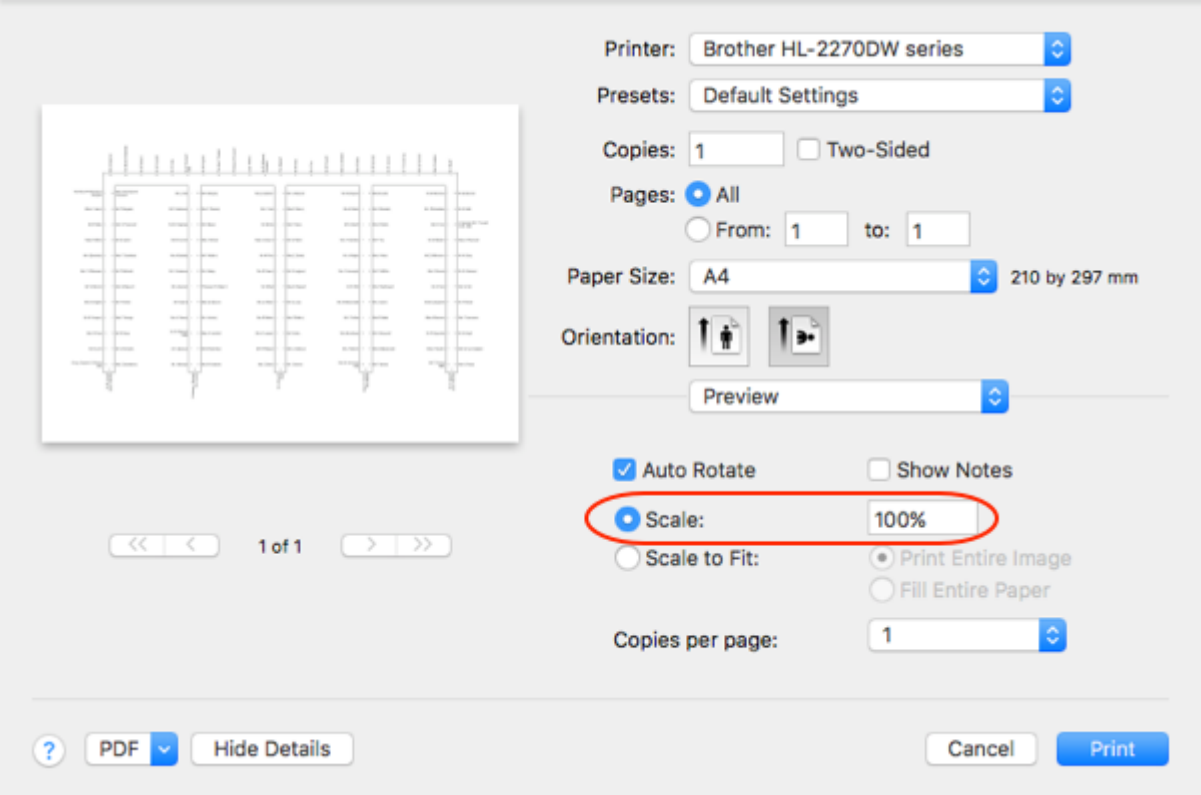
Click **OK** to create the PDF document and close the window. Click **Cancel** to cancel the export process.

Note When printing a PDF, make sure you set the scale to 100% (no scaling) to print the PDF at the correct size.



See also:

- Export formats

2.1.20.21 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.

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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.

Select from the **in** drop-down list, depending on which format of vCard you want to export in:

- vCard format version 3.0 is recommended.
- vCard format version 2.1 is an old format that does not support UTF-8 encoding. This means that some non-English characters may not be supported. It is included for compatibility with older software.

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 **Choose…** 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

2.1.20.22 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 **Choose…** 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)

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to open the selected plan or backup file and close this window. 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

2.1.20.23 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 **Auto size** to set the seat text font size to the optimal size (the largest it can be without any text having to be sized smaller to fit).

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.

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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.

See also:

- Set transparent as colour

2.1.20.24 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**.

Order is the order to display the group members. For example in the **Table Chart** , **Guest Chart** or **Stationery** pane.

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.

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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.

2.1.20.25 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. Common titles can also be configured in the **Preferences** window.

First name(s) is the guest's first (given) name(s). You can also record middle names or initials, if you wish.

Last name(s) 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'). Common suffixes can also be configured in 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. You can also use HTML tags to control the appearance of the guest **Display name** field. 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.

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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 Σ**Report** 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**.

Image is an image to optionally display for this guest. To change the image, either:

- Click on the **Choose...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported. You can also click on the image to select an image file; or
- Drag and drop an image onto **Image**; or
- Select an image from the drop-down list; or
- Click **Default** to set the default image for the guest gender and age.

Guest images larger than 128 x 128 pixels will be automatically resized to fit with 128 x 128 pixels.

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.

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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.

Use **Work phone**, **Home phone**, **Mobile** and **Email** to store guest contact details. It is also possible to store contact details for the group in the **Group** tab.

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**.

Order is the order to display the group members. For example in the **Table Chart** , **Guest Chart** or **Stationery** pane.

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

The contact details in this tab are shared by everyone in the group. This information is optional. It can be useful for creating stationery, such as address labels. You can also store phone numbers and emails for each guest.

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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

2.1.20.26 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 Mac Finder or a web browser.

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

Click on the **Choose...** 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.

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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

2.1.20.27 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 Apple Address Book
- Importing guests from Excel files
- Importing guests from text and CSV files
- Importing guests from vCards

2.1.20.28 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

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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.

Mapping imported columns to guest properties

Setting up common titles and suffixes will often help PerfectTablePlan to make better sense of the data you are importing. Click on the **Titles** and **Suffixes** buttons to set your 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 **File type** is set to **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>	Meal
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, last name or suffixes are not in separate columns, PerfectTablePlan will do it's best to unravel them. For example it can handle all the following:

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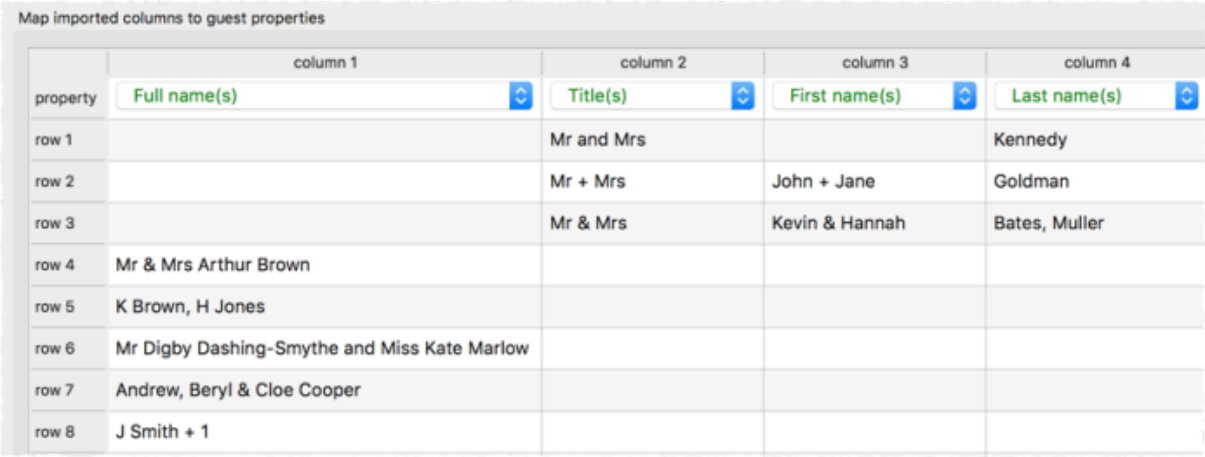
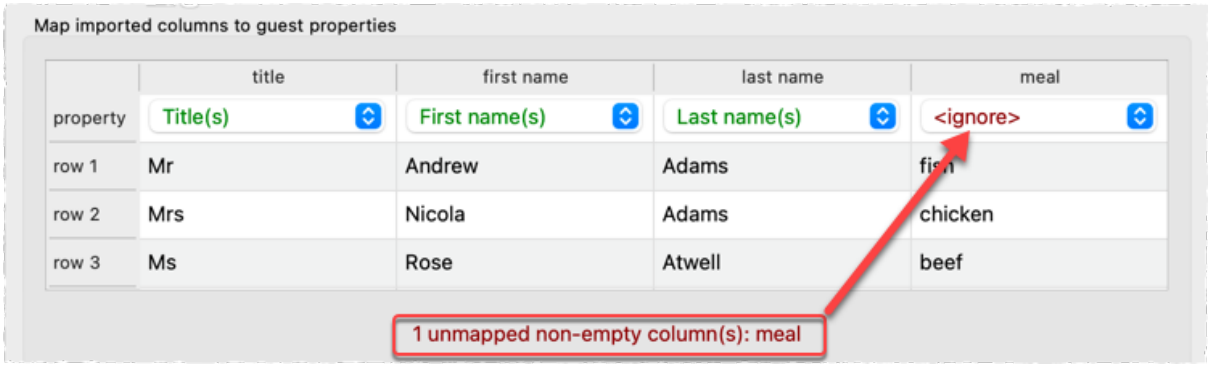


You will be warned of any unmapped input columns:



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, RSVP**, **Icon file** and **Import this row Y/N?**, which are based on the values below:

Column	Values
Gender	Text must start with: • 'F' or 'f' for a female

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	• 'M' or 'm' for male otherwise the guest is imported with unknown gender
Age	Text must start with: • 'C' or 'c' for a child otherwise the guest is imported as an adult
VIP	Text must start with: • 'V', 'v', 'Y' or 'y' for a VIP otherwise the guest is imported as an non-VIP
RSVP	Text must be: • 'Arrived' for arrived, case unimportant • 'Opened', 'Unopened', 'Delivered' or 'Unconfirmed' for sent, case unimportant (for integration with paperlesspost.com, pingg.com and zankyou.com) • '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

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	Otherwise the RSVP status is unset.
Guest image	This needs to be the full path (location) of the image file. E.g. `/Users/Andy/Documents/PerfectTablePlan/guesticon.png`. The images should be PNG or JPEG format. Images larger than 128 x 128 pixels will be scaled down.
Import this row Y/N?	The row will not be imported if the cell contents are empty or contain text beginning with 'N', 'n', 'F' or 'f'.

Changes made to text in the import table will not change the import file. You can also edit any of these properties later, after completing the import.

Advanced and Professional editions only

Importing custom fields

You can import custom field values as below:

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

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	Otherwise set to default
Currency	Valid whole numbers or decimal numbers imported Otherwise set to default
Selection	Allowed selections imported Otherwise set to default Commas are removed from values
Tags	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.

Advanced and Professional editions only

Custom fields are saved in import mappings. For example, if you set up a new import mapping assigning a column to be imported to a custom field with name 'region' and type selection, if you choose that import mapping in future:

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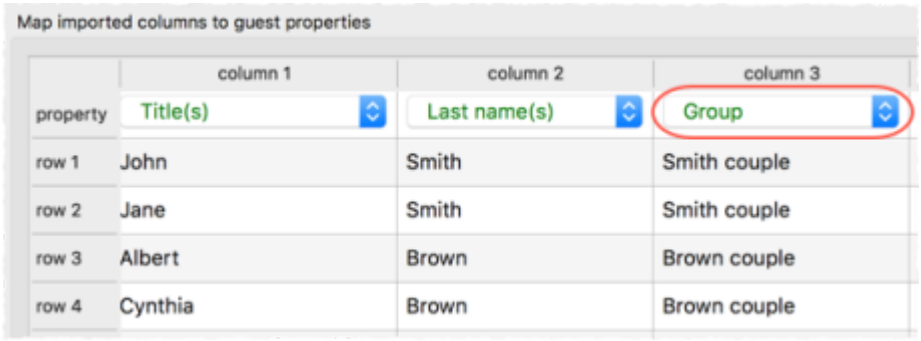
- If a custom field with name 'region' exists then the column will be imported into that.
- If no custom field with name 'region' exists then a new custom field of type 'region' and type selection will be created (assuming you aren't exceeding the maximum custom fields allowed).

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** column during import



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 set a group column.

You can set the default proximities for guests imported as members of couples, families and/or groups in the **Preferences** pane.

When you import group properties (such as group contact details) these are taken from the first guest in the group.

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

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Smith" and **Num. guests** field is 2 the guests "John Smith" and 2 anonymous guests will be added (all in the same group).

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 fewer than the number of named guests, it will be ignored.

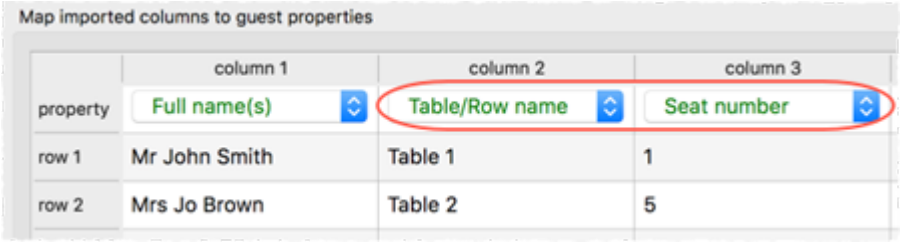
Note You can set the **Num. guests** or **Num. in group** column, but not both.

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.



For more information see Import seating data.

See also:

- Import seating data (video with audio, 0:25 minutes)

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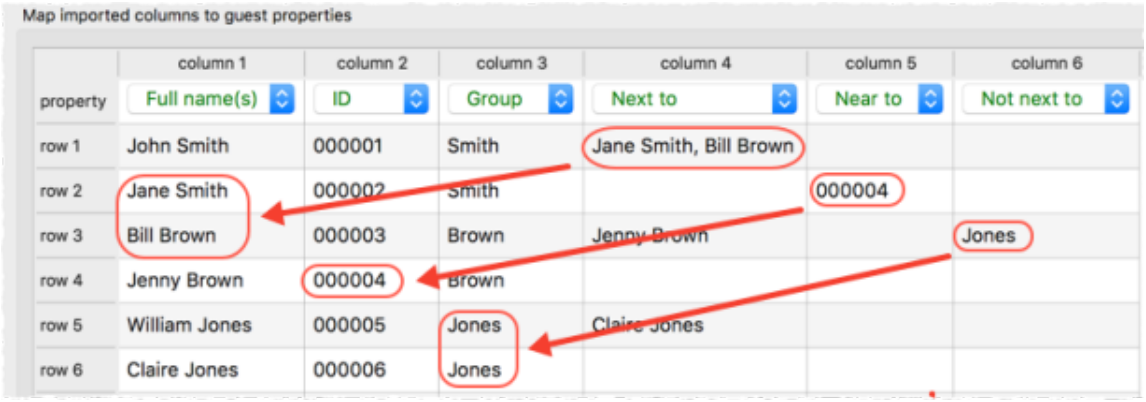
Importing guest proximities

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



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 **Choose...** 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 **Encoding** to set the text encoding for text based input files, such as CSV files. **Automatic** guesses the encoding and will be the right choice in the vast majority of cases.

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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 cell** 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 **Copy column(s)...** to make copies of one or more selected columns. The copies are added to the right of the selected columns.

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.

For more details see joining and splitting columns.

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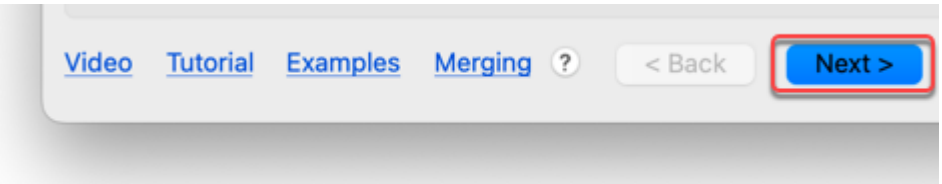
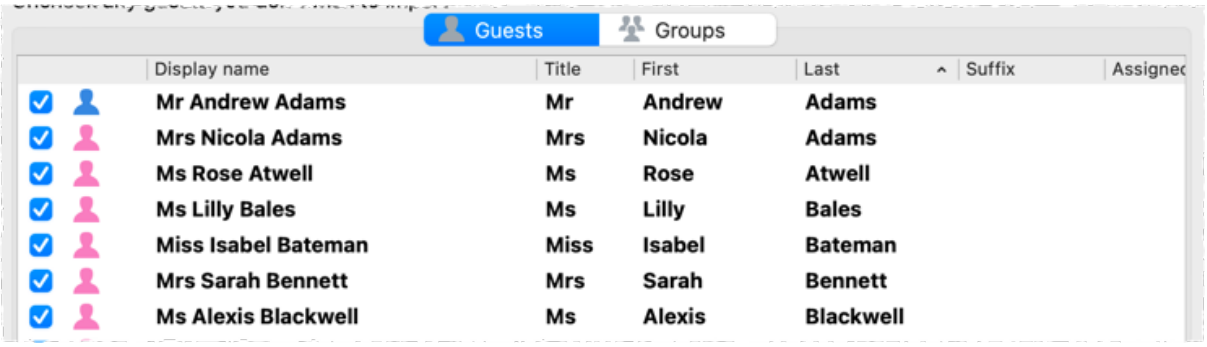
Preview

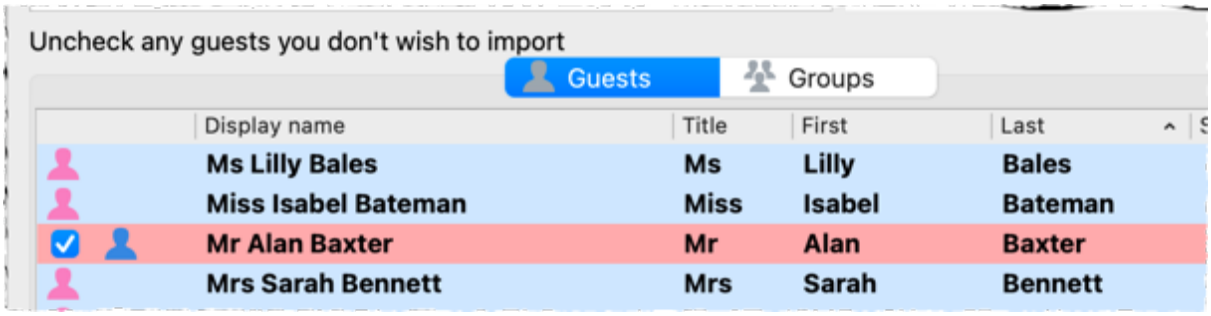
One you have mapped all the columns to PerfectTablePlan properties click **Next>**.



You will then get the chance to preview the changes, before updating your plan. Uncheck any guests you don't wish to import.



If there are existing guests in your plan, guests will be colour coded. Blue for existing guests. Pink for new guests.



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Merging changes

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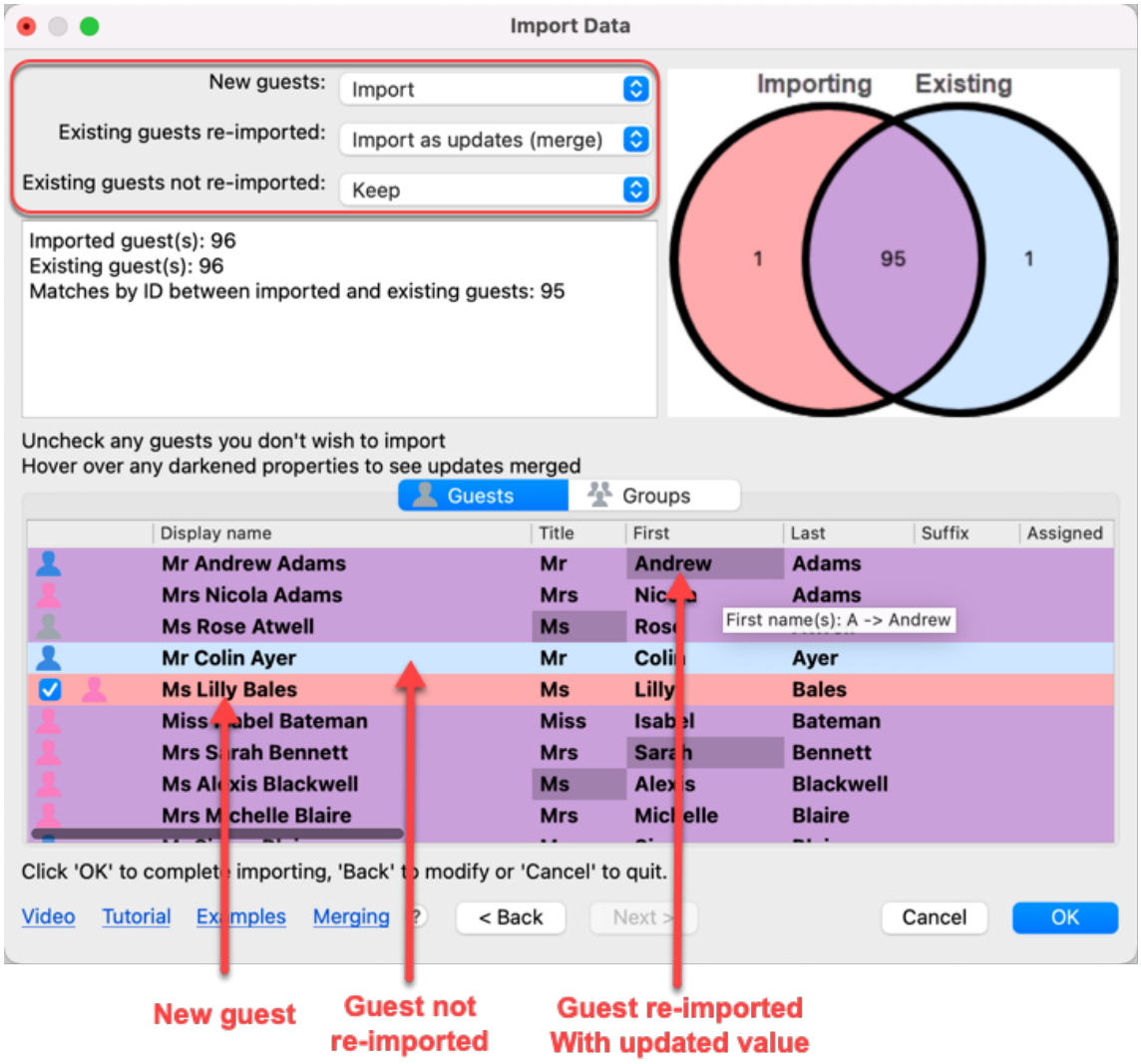
You can also merge changes to already imported guests.



You will be warned about potential issues, such as duplicate names or Ids.

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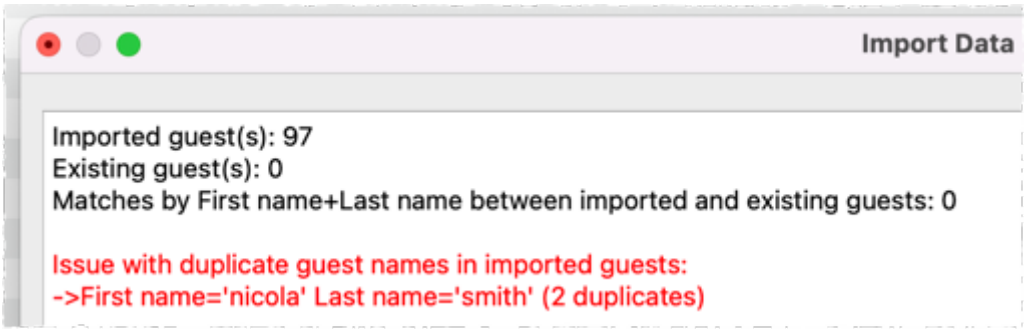
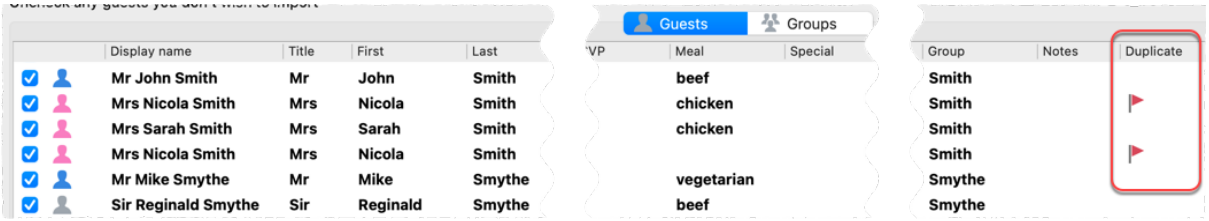


The duplicates are also marked with a flag icon in the last column.



Uncheck any guests that you don't want to import. Use the **Uncheck imported**, **Check imported**, **Uncheck imported duplicates** or **Check imported duplicates** to speed this up.

Click **<Back** to make changes. Click **Cancel** to discard the import. Click **OK** to import the data and close the window.

See also:

- Import your guest list (video with audio, 11:59 minutes)
- Edit guest list data during import (video with audio, 1:16 minutes)
- Importing
- Merge import
- **Quick Add Guests** window
- Importing guests from Apple Address Book
- Importing guests from Excel files
- Importing guests from text and CSV files

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- Importing guests from vCards
- Example import formats

2.1.20.29 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(s) is the guest's first (given) name. You can also record middle names or initials, if you wish.

Last name(s) 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'). Common suffixes can also be configured in the **Preferences** window.

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 new 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**

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window), but you can change this at any time. You can also use HTML tags to control the appearance of the guest **Display name** field. 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**.

Image is an image to optionally display for this guest. To change the image, either:

- Click on the **Choose...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported. You can also click on the image to select an image file; or
- Drag and drop an image onto **Image**; or
- Select an image from the drop-down list; or
- Click **Default** to set the default image for the guest gender and age.

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Guest images larger than 128 x 128 pixels will be automatically resized to fit with 128 x 128 pixels.

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.

Use **Work phone**, **Home phone**, **Mobile** and **Email** to store guest contact details. It is also possible to store contact details for the group in the **Group** tab.

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.

You can jump between guests using *Page Up* and *Page Down* keys.

Advanced and Professional editions only

You can add your own custom fields.

A couple will be given proximity **Next to** by default. 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.

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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**.

The contact details in this tab are shared by everyone in the group. This information is optional. It can be useful for creating stationery, such as address labels. You can also store phone numbers and emails for each guest.

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

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.

2.1.20.30 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. Common titles can also be configured in the **Preferences** window.

First name(s) is the guest's first (given) name(s). You can also record middle names or initials, if you wish.

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Last name(s) 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'). Common suffixes can also be configured in the **Preferences** window.

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 new 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. You can also use HTML tags to control the appearance of the guest **Display name** field. 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.

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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**.

Image is an image to optionally display for this guest. To change the image, either:

- Click on the **Choose...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported. You can also click on the image to select an image file; or
- Drag and drop an image onto **Image**; or
- Select an image from the drop-down list; or
- Click **Default** to set the default image for the guest gender and age.

Guest images larger than 128 x 128 pixels will be automatically resized to fit with 128 x 128 pixels.

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.

Use **Work phone**, **Home phone**, **Mobile** and **Email** to store guest contact details. It is also possible to store contact details for the group in the **Group** tab.

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**.

You can jump between guests using *Page Up* and *Page Down* keys.

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You can add your own custom fields.

Adult in a family will be given proximity **Next to** each other by default. The rest of the members of the family with 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**.

The contact details in this tab are shared by everyone in the group. This information is optional. It can be useful for creating stationery, such as address labels. You can also store phone numbers and emails for each guest.

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

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.

2.1.20.31 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

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and floor plan items that are not well represented by shapes. To display this window click the **Insert image** button at the top of the **Floor Plan** pane.

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

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

Click on the **Choose...** 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.

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You can also insert an image by dragging an image file from your operating system or web browser into the **Floor Plan** pane.

- Add a graphic/image/clipart to the floor plan
- Find free clipart

2.1.20.32 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. Common titles can also be configured in the **Preferences** window.

First name(s) is the guest's first (given) name(s). You can also record middle names or initials, if you wish.

Last name(s) 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'). Common suffixes can also be configured in the **Preferences** window.

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

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checked **automatically capitalise new 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. You can also use HTML tags to control the appearance of the guest **Display name** field. 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**.

Image is an image to optionally display for this guest. To change the image, either:

- Click on the **Choose...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported. You can also click on the image to select an image file; or

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- Drag and drop an image onto **Image**; or
- Select an image from the drop-down list; or
- Click **Default** to set the default image for the guest gender and age.

Guest images larger than 128 x 128 pixels will be automatically resized to fit with 128 x 128 pixels.

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.

Use **Work phone**, **Home phone**, **Mobile** and **Email** to store guest contact details. It is also possible to store contact details for the group in the **Group** tab.

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**.

You can jump between guests using *Page Up* and *Page Down* keys.

Advanced and Professional editions only

You can add your own custom fields.

All the members of the group with be given proximity **Near to** each other by default. You can change this at any time in the **Proximity** pane.

Group

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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**.

The contact details in this tab are shared by everyone in the group. This information is optional. It can be useful for creating stationery, such as address labels. You can also store phone numbers and emails for each guest.

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

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.

2.1.20.33 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. Common titles can also be configured in the **Preferences** window.

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First name(s) is the guest's first (given) name(s). You can also record middle names or initials, if you wish.

Last name(s) 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'). Common suffixes can also be configured in the **Preferences** window.

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 new 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. You can also use HTML tags to control the appearance of the guest **Display name** field. 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

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should be separated by commas, the Σ**Report** pane will then total each separately.

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

Image is an image to optionally display for this guest. To change the image, either:

- Click on the **Choose...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported. You can also click on the image to select an image file; or
- Drag and drop an image onto **Image**; or
- Select an image from the drop-down list; or
- Click **Default** to set the default image for the guest gender and age.

Guest images larger than 128 x 128 pixels will be automatically resized to fit with 128 x 128 pixels.

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.

Use **Work phone**, **Home phone**, **Mobile** and **Email** to store guest contact details. It is also possible to store contact details for the group in the **Group** tab.

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.

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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**.

The contact information is optional. It can be useful for creating stationery, such as address labels. You can also store phone numbers and emails for each guest.

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

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.

2.1.20.34 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.

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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 **Edge** 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.

See also:

- Add a dance floor, stage etc to the floor plan
- Set transparent as colour

2.1.20.35 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>Serpentine Table**, **Insert>Half Serpentine 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.

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.

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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) (Advanced and Professional editions 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 can have rounded ends
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

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Serpentine		a 180 degree curved table (Advanced and Professional editions only)
Half serpentine		a 90 degree curved table (Advanced and Professional editions only)
Row of seats		a row of seats (no table), can be curved

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 or serpentine 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.

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- If you set **Create** to 2 or more, **Seat numbers** to **sequential** and check **start each with new seat number** then the first seat of each table/row will start with a new seat number, consecutive from the previous one.

Set the **Display** 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. The tooltip shows many you need to create to add to seat all guests and all RSVP=accepted guests.

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.

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See also:

- Add/remove a single seat to/from a table
- Change the seat numbering
- Create rectangular tables with seats on 1,2 or 3 sides
- Create an E-shaped table
- Create a horseshoe shaped table
- Create sweetheart/cabaret style tables
- Set transparent as colour

2.1.20.36 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.

See also:

- Add a title or text into the floor plan

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- Set transparent as colour

2.1.20.37 Join Columns window

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

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

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

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

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

Click **Cancel** to discard the changes.

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

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

See also:

- Edit guest list data during import (video with audio, 1:16 minutes)
- **Split columns** window

2.1.20.38 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 ⌘+*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.

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

Click **Upgrade V6 to V7** if you have a version 6 key and wish to upgrade to version 7.

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

2.1.20.39 Multi-Level Sort window

Use this window to sort guests by more than one column (e.g. by last name then by first name). To display this window click the button at the top of the **Guests** pane or **Groups** pane.

Click **Add** to add a new sort level.

Click **Delete** to delete the selected sort level(s).

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

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

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

Note If you just want to sort by a single column, you can just click the appropriate column header (click it again to reverse the sort direction).

See also:

- Assign seating by order of precedence
- Order guests by title or suffix

2.1.20.40 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>).

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

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2.1.20.41 Numbers and Budget window

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

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

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

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

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

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

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

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

Estimated cost is derived from the cost data 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.

See also:

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- **Report** pane

2.1.20.42 Page Setup window

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

See also:

- **Print** window
- **Print Setup** window

2.1.20.43 Preferences window

The **Preferences** window allows you to change the behaviour of the software according to your preferences. Changes apply to all plans edited by the current user henceforth, not just the current plan. To display this window select **PerfectTablePlan>Preferences**.

The Window has 9 tabs:

- Edition
- General
- Auto assign
- Proximity
- Names
- Titles
- Suffixes
- Status bar
- Terms
- Backups
- Warnings

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- Transfer

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

Check **hide 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 **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 Mac file **Open** and **Save** windows. We only recommend unchecking this if you have problems with the native file open/save windows.

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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**.

Set **Default units** according to whether you want newly created plans to default to **Metres** or **Feet**.

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 when you move the mouse wheel backwards in the **Floor Plan** pane and **Table Plan** pane . Hold down the ⌘ key while moving the mouse wheel to get the alternate (zoom->scroll, scroll->zoom) behaviour.

Note The scroll direction will be reversed if Mac System Preferences **Mouse>Point and click>Scroll direct natural** is unchecked.

Select **Allow seat assignment with RSVP** according to which RSVP statuses you wish to allow guests to be assigned with. Changing the selection can cause guests to be unassigned from their seats if their RSVP status is incompatible with the new setting.

Set **User name for stamp** to include a user name each time you click on a **Stamp>>** button. This can be useful to seeing who made changes to a shared plan. You can leave it blank.

Set **User interface scaling** according to how you want to handle display scaling. This typically affects high resolution displays, such as 4K and Mac Retina displays. If your operating system scaling is set to 100%, then this setting will have no effect.

- **Standard** keeps the operating system scaling. E.g. If the display scaling is set to 150% then the user interface is scaled 150%.
- **Round up** rounds up the scaling to a whole number. E.g. If the display scaling is set to 150% then the user interface is scaled 200% (looks bigger).
- **Round down** rounds down the scaling to a whole number. E.g. If the display scaling is set to 150% then the user interface is scaled 100% (looks smaller).

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You need to exit and re-start PerfectTablePlan for the change to take effect.

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

Set **Store these preferences in** according to how you wish to store your preferences. Saving to a .ini file is useful if you want to run PerfectTablePlan from a portable device, such as a USB drive.

Auto assign

Select **in any order** if you want the auto seating to assign to tables in any order. This is recommended if **according to guest proximity** is checked, to get the best (highest scoring) seating. Select **in the order shown in the schematic pane** to assign guests to tables in the order in which the tables are displayed in the **Schematic** pane (top to bottom).

Select **according to guest proximity** if you want the auto seating to assign guests according to the proximities set in the **Proximity** pane. Select **in the order shown in the Guests pane to** assign guests in the order they are listed in the **Guests** pane. Select **randomly** to assign guests to seats completely randomly (this may be useful for some types of events).

Check **animate in Floor Plan** if you want to see the auto seat assignment animated. Note that this slows down the auto seat assignment a little.

Select **decided by PerfectTablePlan** to let PerfectTablePlan choose when to stop the automatic assignment. PerfectTablePlan will try to calculate a good seating arrangement without taking too much time.

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 **generations without improvement** if you wish the automatic assignment to stop after a specified number of generations without improving the score. We recommend you allow at least 50 generations without improvement. 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 of the above 2 happens first** to stop when either of the above two criteria is met, e.g. the automatic assignment has run for x seconds or y generations without an improvement.

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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 **social distancing** if you want the automatic assignment to try not to put guests from different groups next to each other. Only works if there are more seats than guests.

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.

Select **Prefer next to guests seated** depending on whether you want 'next to' proximity couples with the female to the left or right of the male. This also affects the order in which groups of guests are placed on tables by drag and drop.

Proximity

You can set the default proximity for couples, families and groups. This only applies when the couple, family or group is first created e.g. using **Insert>Guest Couple** or during import. Changes here will not affect existing guest proximities.

Names

Check **automatically capitalise new guest names** to automatically capitalise guests titles, first names, last names and suffixes as they are typed (e.g. convert `mr john smith phd` automatically to `Mr John Smith Phd`). This only works when adding new guests through **Insert>Single Guest...**, **Insert>Guest Couple...** etc, not for editing existing guests.

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.

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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.

If you change the **New table name format** or **New seat row name format** you will be given the option to update table names for existing tables.

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.

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You can also use custom fields in the **Default display name format**.

You can use the HTML tags to control how the **Display name** field appears in the **Floor Plan**, **Table Plan**, **Table chart** and **Guest chart** panes.

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

Particules is a comma separated list of last name prefixes (e.g. the 'da' in 'Leonardo da Vinci' is a particule).

- particules are matched regardless of case (e.g. 'da' matches 'da', 'Da' and 'DA')
- particules can be combined (e.g. 'van de' will be recognized as a particule if 'van' and 'de' are listed)
- particules are used to split names into first name and last name when importing (e.g. to split 'Leonardo da Vinci' into first name = 'Leonardo' and last name='da Vinci').
- particules are ignored when sorting by last name or group name if **ignore particules when sorting** is checked (e.g. 'da Vinci' is sorted as 'V' instead of 'd')

Titles

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Titles that you add here will be available in the guest **Title** field for all plans. They will also be used when importing full names to determine which parts of the name are titles. Titles vary widely between different countries and types of event. Add titles appropriate to your usage.

Note This is intended for titles that come before the name (e.g. Dr, Herr, Colonel etc). Titles that come after the name (e.g. PhD, MBE) should be added as Suffixes.

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 **Clear** to delete all of the titles in the list.

Click **Import from plan** to import titles from the current plan into the preferences.

Click **Add text list...** to add a list of titles in text form.

Select from **Add pre-defined...** to add lists of pre-defined titles/ranks.

Set **Sort titles in 'Guests' and 'Groups' panes** depending on whether you want titles to be sorted alphabetically or according to the order in this tab (any titles not listed will be sorted alphabetically, after those listed).

Set **Default couple** to the titles you wish to use as the default when adding a couple or family.

Suffixes

Suffixes that you add here will be available in the guest **Suffix** field for all plans. They will also be used when importing full names to determine which parts of the

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name are suffixes. Suffixes vary widely between different countries and types of event. Add suffixes appropriate to your usage.

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

Click **Delete** to delete the selected suffix(es).

Click **Up** to move the selected suffix(es) up one row.

Click **Down** to move the selected suffix(es) down one row.

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

Click **Clear** to delete all of the suffixes in the list.

Click **Import from plan** to import suffixes from the current plan into the preferences.

Click **Add text list...** to add a list of suffixes in text form.

Set **Sort suffixes in 'Guests' and 'Groups' panes** depending on whether you want titles to be sorted alphabetically or according to the order in this tab (any suffixes not listed will be sorted alphabetically, after those listed).

Status bar

You can customize the numbers that appear in the status bar.

Set **Numbers displayed** to the numbers and associated text you want to appear. Use the substitution text shown, e.g. `{guests}` to show the total number of guests. Substitution text is not case sensitive.

See a preview of what the numbers will look like for the current plan in the **Preview** field.

Click **Reset** to set **Numbers displayed** back to the default.

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".

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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.

Set **In folder** to an existing folder that you want to create the backup files in.

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.

Transfer

You can copy your Preference settings from one computer to another using a .tpp file. This can be useful for transferring PerfectTablePlan to a new computer or for just storing a set of Preferences.

Click **Export Preferences...** to export the current preferences to a .tpp file.

Click **Import Preferences...** to import preferences from a .tpp file.

The following are not exported or imported:

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- **Preferences>General>User interface scaling**
- **Preferences>General>Store these preferences in**
- your licence key

Buttons

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

2.1.20.44 Print window

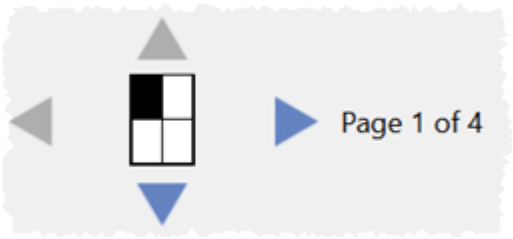
The **Print** window is displayed when you print the front pane. To display this window select **File>Print** or the equivalent **Main** tool bar button. You can only print the **Floor Plan**, **Table Plan**, **Table Chart**, **Guest Chart**, **Stationery** and **Report** panes. The exact controls visible 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).

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Select **landscape** or **portrait** to change the orientation of the print out.

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

2.1.20.45 Print Setup window

The **Print Setup** window allows you to change printer settings. To display the **Print Setup** window click the **Setup...** button in the **Print** window.

Select a printer from the **Printer** drop-down menu.

Select a preset printer settings from the **Presets** drop-down menu.

Use **Copies** to set the number of copies you want to print.

Select **Preview** to change other printer settings, such as the page orientation.

Click on the **Print** button to 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

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2.1.20.46 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...** and **Suffixes...** buttons to set-up standard titles and suffixes in the **Preferences** window. This will help PerfectTablePlan make better guesses about how to split names correctly into titles, first names, last names and suffixes and set gender and age.

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

The proximities for groups of guests are set according to your Preferences.

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

2.1.20.47 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

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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.

See also:

- Fast table renumber (video with audio, 0:44 minutes)
- Create a floor plan (video with audio, 10:27 minutes)
- Rename/renumber tables
- Change the seat numbering

2.1.20.48 Replace Text window

Use this window to change 1 or more text properties for guests, groups and tables. To display this window select **Edit>Replace Text...**.

Professional edition only

You can also replace text in custom fields of type **Text** or **Tags**.

Set the **Replace** drop-down list and text according to what you want to replace:

- Select **Part text** to replace any part(s) of text that match the **Replace** text by the text in **With**. E.g. 'Mr' matches 'Mr' and the first 2 letters of 'Mrs'.
- Select **Whole text** to replace text that matches the whole of the **Replace** text by the text in **With**. E.g. 'Mr' matches 'Mr' but not 'Mrs'.

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- Select **Empty text** to replace empty text by the text in **With**. Text containing white space is not considered empty.

Professional edition only

- Select **Regex** to replace any parts of text that match the **Replace** regular expression by the text in **With**.

Regular expressions are an esoteric pattern matching language. If you haven't come across regular expressions before, you can probably ignore this!

Check **case sensitive** for case sensitive text matching.

Check the appropriate check boxes for the properties you want to replace text in.

A preview of any changes is shown. If you mess things up, you can **Edit>Undo** the changes after closing the window.

Note that changing guest properties may also update any guest default display names, depending on **Preferences>Names>Default display name format**.

See also:

- Edit a property for multiple guests
- Edit a property for multiple tables

2.1.20.49 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".

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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.

See also:

- Add a new stationery layout
- Load sample stationery

2.1.20.50 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 **Colour 1** to **Colour 2** in the direction set by the **Direction** dial.

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

See also:

- Set transparent as colour

2.1.20.51 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.

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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 ⌘+click and/or ⇧+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.

2.1.20.52 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 ⌘+click and/or ⇧+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.

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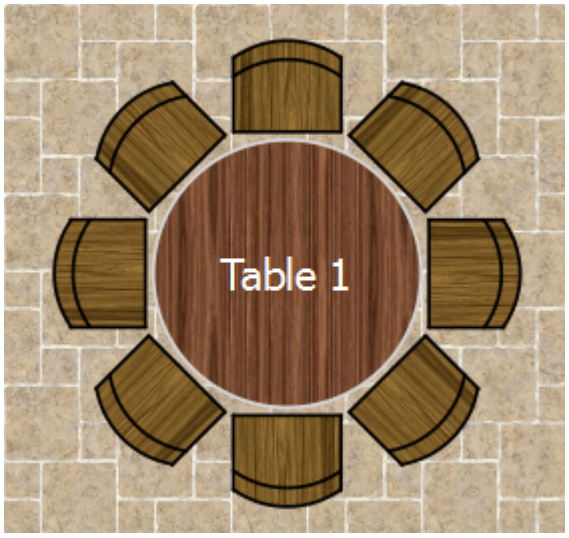
Click **Cancel** to discard the changes.

2.1.20.53 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 Mac Finder 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 **Choose...** button to select an image file to load. PNG, JPEG and BMP image file formats are supported.

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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

2.1.20.54 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 **Edge** colour button to set a colour for the outside of the shape.

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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.

See also:

- Set transparent as colour

2.1.20.55 Show Guest Details window

Professional edition only

The **Show Guest Details** window allows you to select which guest properties to display in the **Check-In Guests** window. To display this window:

1. Select **File>Check-In Guests...** .

2. Check **show guest details.**

3. Select **Selected...** from the adjacent drop-down list

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

See also:

- Checking-in guests

- Check-in guests tutorial

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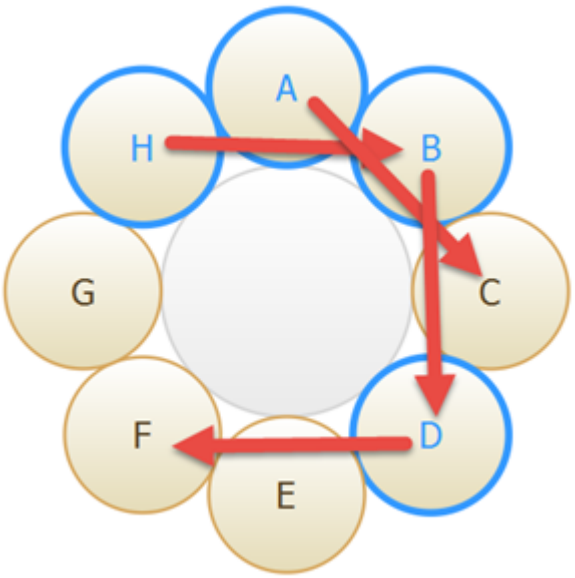
2.1.20.56 Shuffle Seats window

Use this window to move 1 or more selected guests 1 or more seats clockwise or anti-clockwise on the same table. This is different to rotating the table because guests change seats, but the table and seats are not changed. To display this window select **Edit>Shuffle Seats...**.

Set **seats(s)** to the number of seats you want to move the selected guests.

Set **Clockwise/Anti-Clockwise** to the direction you want to move them.

For example shuffling guests A, B, D and H by 2 seats clockwise:



Will have the following end result:

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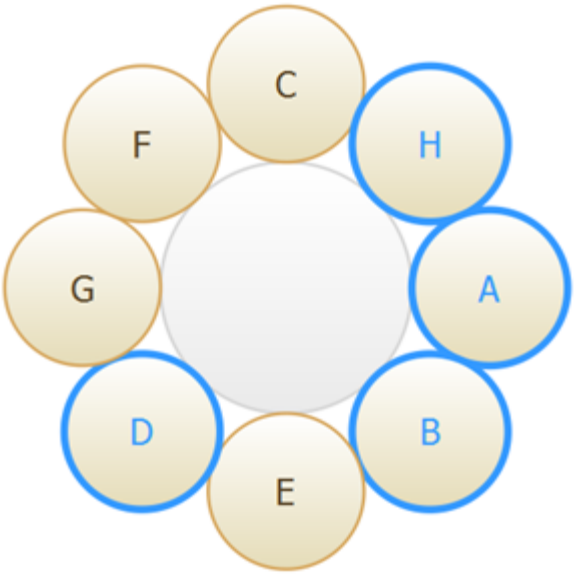

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The shuffle function can be very useful when you have resized an E-shaped table.

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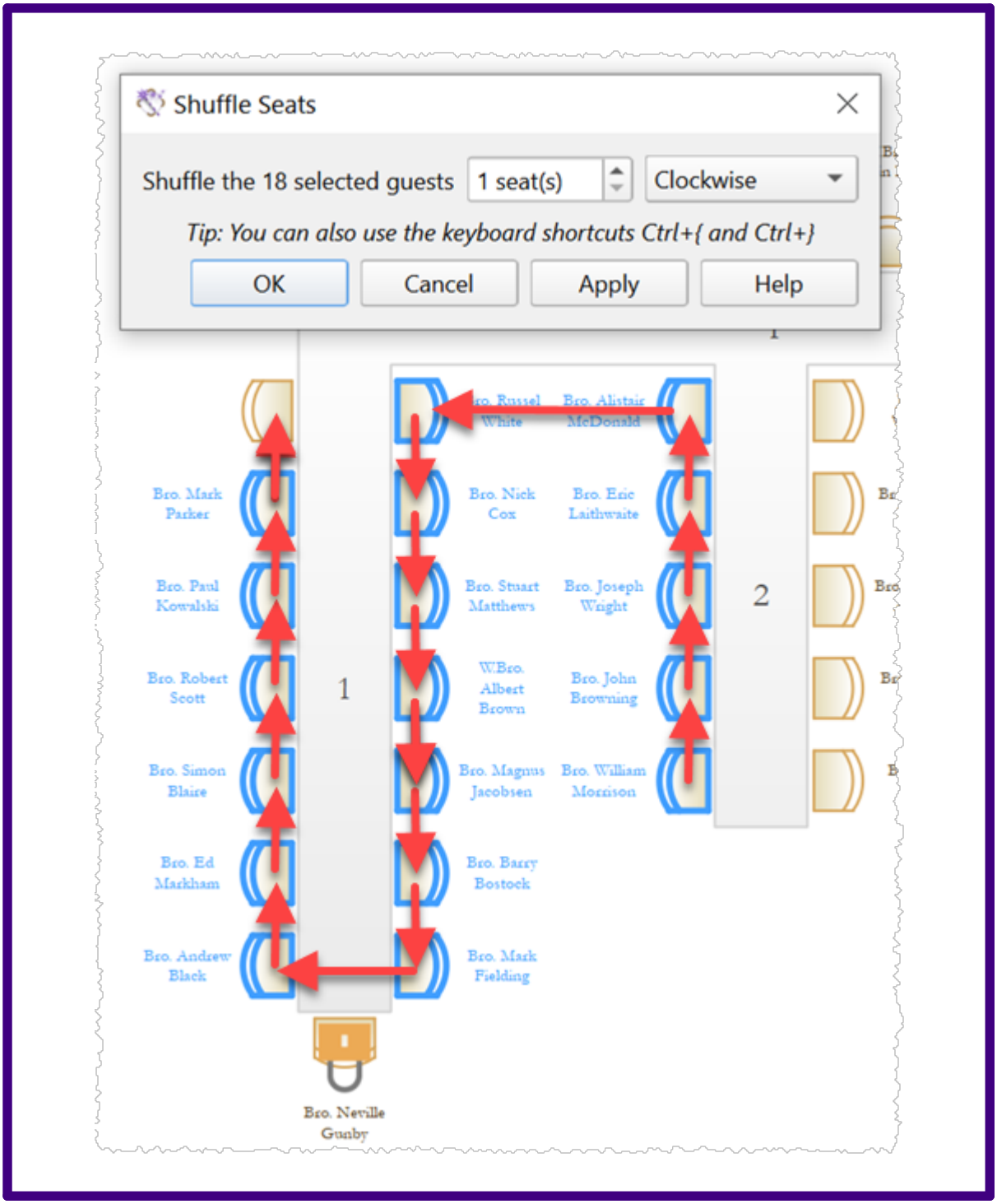

Locked seats are ignored (flowed around) when calculating the seat shuffled to.

If you want to select a number of seats to shuffle, but not a whole table:

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- Left-click and drag a 'rubber box' in the **Floor Plan** pane to select the seats.
- Use ⌘+Click to unselect any seats or tables you didn't intend to select.

If shuffling seats is slow, trying hiding the legend in the **Table Plan** pane.

Hint You can also use keyboard accelerators ⌘+} and ⌘+{ to shuffle selected guests 1 seat clockwise or anti-clockwise.

2.1.20.57 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"

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-	every	"John Smith, CEO, Smith industries" "UK"

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

See also:

- Edit guest list data during import (video with audio, 1:16 minutes)
- **Join Columns** window

2.1.20.58 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).

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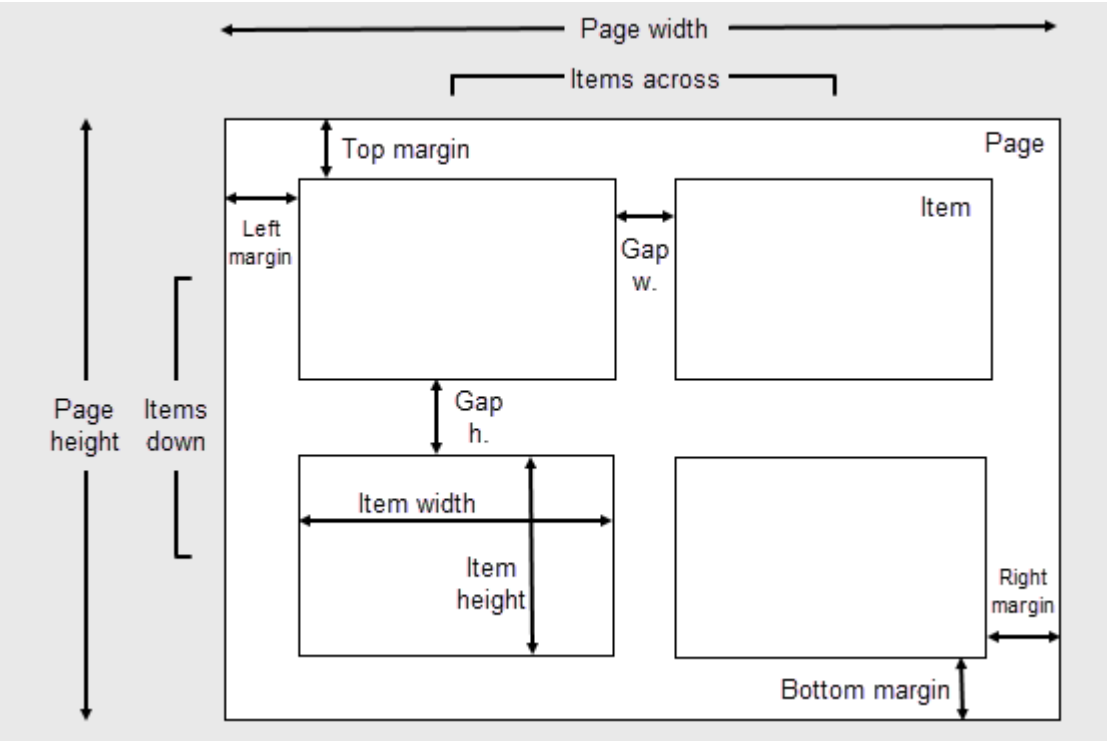

Change **Units** to change between mm and inches.

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:

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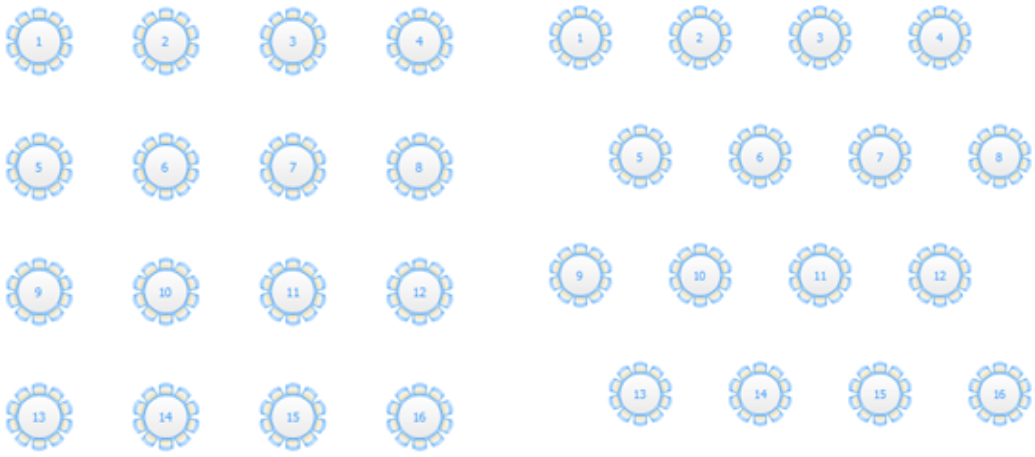
- Create place cards and other stationery (video with audio, 10:08 minutes)
- Add a new stationery layout
- Load sample stationery
- Print stationery on blank sheets
- Print stationery on press-out sheets

2.1.20.59 Table Layout window

Professional edition only

The **Table Layout** window allows you quickly layout large numbers of tables in a wide range of different layouts and orderings. To display this window click the button at the top of the **Floor Plan** pane. You need to select at least 2 tables and not have the **Freeze floor plan** box checked for this button to be enabled.

Grid allows you to set the size and alignment of the grid.



Aligned grid **Offset grid**

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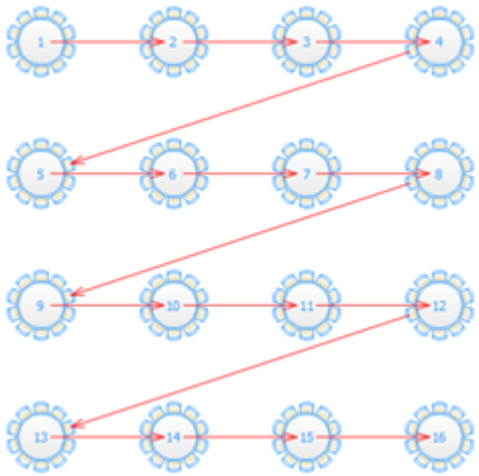
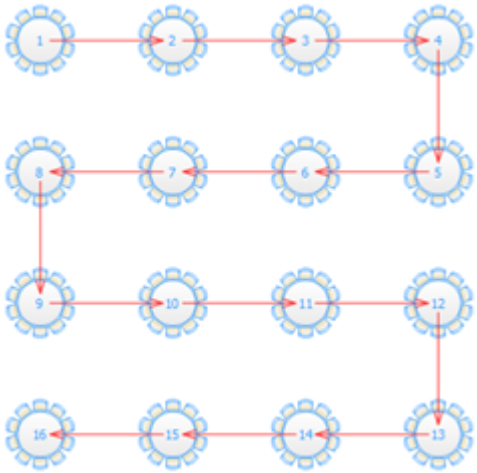
Spacing allows you to set the horizontal and vertical distance between table centres. If **Snap to grid** is set on (in the **Dimensions** window) then you can only set the spacing in multiples of the snap grid.

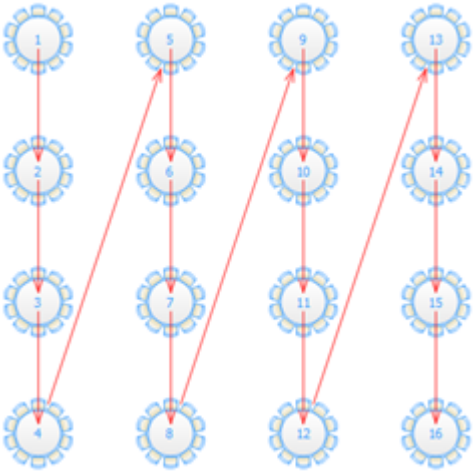
Ordering allows you to specify in what order the tables are laid out: left to right/right to left, top to bottom/bottom to top, horizontally/vertically, typewriter/snake.

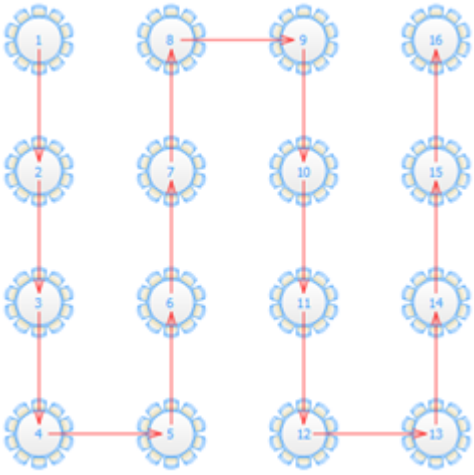


Horizontally/Typewriter



Horizontally/Snake





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Vertically/Typewriter **Vertically/Snake**

Click the **Table Order...** button to change the order in which the tables are laid out in the **Table Order** window. Note that this will also affect ordering in other panes, e.g. the **Table Chart** pane.

Preview shows you what the new table layout will look like. Check **show table order** to easily see the layout order of the tables.

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

You can drag the selected tables to any position in the floor plan after you close this window.

See also:

- Create a floor plan (video with audio, 10:27 minutes)
- **Dimensions** window
- **Table Order** window
- Space tables correctly
- Edit a property for multiple tables

2.1.20.60 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** or **Schematic pane** panes.

Select a table and use the **Top**, **Up,** **Down** and **Bottom** buttons to change its order.

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Click on the **Sort** button to order tables. The sort is basically alphabetic, but it will try to intelligently handle numbers and mixes of numbers and letters. E.g. to sort "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.

See also:

- Change the table order

2.1.20.61 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 an change this to anything you like. The name doesn't have to be unique and can be blank.

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) (Advanced and Professional editions only)

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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 can have rounded ends
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
Serpentine		a 180 degree curved table (Advanced and Professional editions only)
Half Serpentine		a 90 degree curved table (Advanced and Professional editions only)

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Row of seats	----	a row of seats (no table), can be curved

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 or serpentine 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 **Display** 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.

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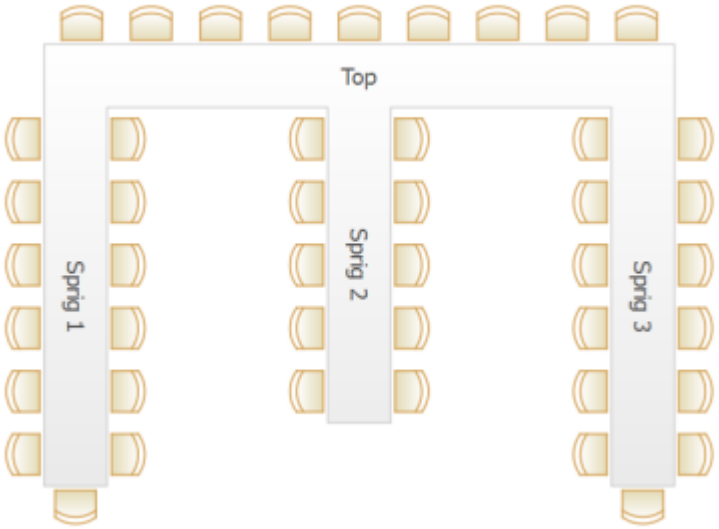
If you have a circular table bigger than the auto size you can uncheck **space seats evenly** to group all the seats together. This is useful for 'sweetheart' or 'cabaret' style seating.

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.

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See also:

- Add/remove a single seat to/from a table
- Change the seat numbering
- Create rectangular tables with seats on 1,2 or 3 sides
- Create an E-shaped table
- Create a horseshoe shaped table
- Create sweetheart/cabaret style tables
- Edit a property for multiple tables
- Set transparent as colour

2.1.20.62 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.

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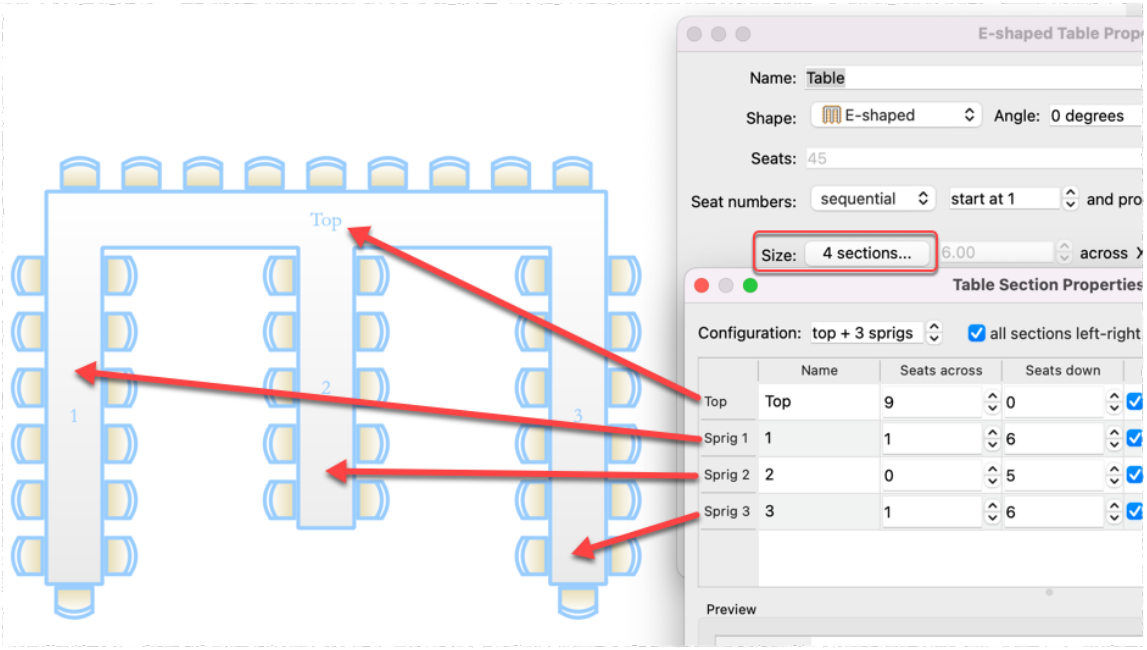

The first section listed is always the top section. The remaining sections are the sprigs, from left to right. Each section has the following properties:

- **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.

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- **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.

See also:

- Create an E-shaped table

2.1.20.63 Text Properties window

The **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.

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See also:

- Add a title or text into the floor plan

2.1.20.64 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.

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See also:

- Changing visualization colours (video with audio, 1:20 minutes)
- Show custom fields
- Show gender
- Show groups
- Show meals

2.1.21 Drag and drop

The following drag and drop operations are supported:

Item	Modifier key	From	To	Result
group(s) or guest(s)	none	**Guests** pane, **Groups** pane, **Schematic** pane, **Floor Plan** pane or **Table Plan** pane	seat, table or background in **Floor Plan** pane, **Table Plan** pane or **Schematic** pane	guest(s) (re) assigned/unassigned
guest(s)	⇧	**Guests** pane, **Groups** pane, **Schematic** pane, **Floor Plan** pane or **Table Plan** pane	seat, table or background in **Floor Plan** pane, Table Plan pane or **Schematic** pane	all members of group(s) (re) assigned/unassigned
group(s) or guest(s)	none	**Groups** pane	**Groups** pane	group membership changed

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background	none	**Floor Plan** pane or **Table Plan** pane	different position (right mouse button)	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 Chart** pane, **Guest Chart** pane or **Report** pane	import vCard
Excel/CSV/text file	none	operating system	**Guests** pane, **Groups** pane, **Schematic**	import Excel/text/CSV file

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			pane, **Floor Plan** pane, **Table Plan** pane, **Table Chart** pane, **Guest Chart** pane or **Report** pane	
image file	none	operating system or web browser	**Floor Plan** pane	import image
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

2.1.22 Keyboard accelerators

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

Key	Accelerator	Action
1	⌘*1*	Add guests task
2	⌘*2*	Proximity task
3	⌘*3*	Add tables task
4	⌘*4*	Assign seats task

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5	⌘*5*	Print task
A	⌘*A*	Select all (but not hidden items)
B	⌘*B*	Numbers and Budget
C	⌘*C*	Copy
	⌥*C*	Collapse all in **Groups** pane or **Schematic** pane
D	⌘*D*	Show selected in **Floor Plan** pane
	⌥⌘*D*	Show selected in **Table Plan** pane
	⌥⇧⌘*D*	Show selected in **Schematic plan** pane
	⇧⌘*D*	Show selected in **Guests plan** pane
	⌥⇧*D*	Show selected in **Groups plan** pane
E	⌘*E*	Export
F	⌘*F*/⌥⌘F	Find in **Guests**, **Groups**, **Floor plan**, **Schematic** or **Proximity** pane
G	⌘*G*	Insert single guest
	⌥⌘*G*	Insert guest couple
	⇧⌘*G*	Insert guest family
	⌥⇧⌘*G*	Insert guest group
H	⌘*H*	Hide PerfectTablePlan

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	⌥⌘*H*	Hide others
I	⌘*I*	Import
	⇧⌘*I*	Event Information
J	⌘*J*	Quick insert guests
K	⌘*K*	lock selected guests
	⇧⌘K	unlock selected guests
L	⌘*L*	Auto Assign Seats
M	⇧⌘*M*	Insert custom table
N	⌘*N*	New plan
O	⌘*O*	Open plan
	⇧⌘*O*	Open Recent
P	⌘*P*	Print
Q	⌘*Q*	Quit PerfectTablePlan
R	⌘*R*	Insert rectangular table
	⌥⌘*R*	Insert banquet table
	⇧⌘*R*	Insert head table
S	⌘*S*	Save plan
	⇧⌘*S*	Save plan as

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T	⌘*T*	Insert circular table
	⌥⌘T	Insert semi-circular table
	⇧⌘*T*	Insert oval table
	⌥⇧⌘T	Insert row of seats
U	⌘*U*	Unassign guest
V	⌘*V*	Paste
W	⌘*W*	Close window
X	⌘*X*	Cut
	⌥*X*	Expand all in **Groups** pane or **Schematic** pane
Z	⌘*Z*	Undo
	⇧⌘*Z*	Redo
F1	⇧*F1*	Context sensitive help
F2	^*F2*	Move focus to menu bar
F4	⌘*F4*	Close window
F5	*F5*	Refresh
F12	⌘*F12*	Credits
Asterisk	⌘*	RSVP declined
Back slash	⌘\	RSVP unset

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Backspace	*Backspace*	Delete
Bracket	⌘[/⌘]	Previous/next table, guest, group in the **Floor Plan** pane, **Table Plan** pane, **Proximity** pane, **Table Properties** window, **Guest Properties** window or **Group Properties** window
	⌘{/⌘}	Shuffle the selected guests 1 seat anti-clockwise/clockwise
Comma	⌘,	Preferences
Del	*Del* ⌦	Delete
Enter	⌥↩	Properties
Escape	*Escape*	Close window
Forward slash	⌘/	RSVP accepted
Left/Right	*Left arrow/Right arrow*	Move selected items in **Floor Plan** pane. Moves 1 grid position if grid snap on. Otherwise moves 5 cm / 2 inches per key press.
	⌘*Left arrow*/⌘ *Right arrow*	Start/end of line
	⌥*Left arrow*/⌥ *Right arrow*	Select next/previous table in **Floor Plan** or **Table Plan** pane
Period	⌘.	Globally add/remove "." from titles e.g. "Mr" <-> "Mr."
	⌘⇧.	Rotate selected item 45 degrees clockwise in **Floor Plan**

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Plus/Minus	⌘+/⌘-	Zoom in/zoom out
Question mark	⌘?	Context sensitive help
Semi-colon	⌘;	Add an extra seat in the position of the selected seat(s)
Tab	*Tab*/⇧*Tab*	Next field/previous field
Up/Down	*Up arrow/Down arrow*	Move selected items in **Floor Plan** pane. Moves 1 grid position if grid snap on. Otherwise moves 5 cm / 2 inches per key press.
	⌥*Up arrow*/⌥ *Down arrow*	Select next/previous seat in **Floor Plan** or **Table Plan** pane

2.1.23 Gestures

If your device supports gestures, you can 'pinch' to zoom in the **Floor Plan** and **Table Plan** panes.

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), Numbers and many other types of applications. Columns and rows are delimited by commas and carriage returns, respectively. " and , characters are quoted.

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- **Delimited text data** - A text file with the user's choice of delimiters (separators). Many applications can produce data in this form. 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 your guest list (video with audio, 11:59 minutes)
- **Import** window
- Importing guests from Excel files
- Importing guests from text and CSV files
- Importing guests from vCard files
- Import guests tutorial
- Example import formats
- Merge import

2.2.2 Importing guests from Excel files

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

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.

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See also:

- Import your guest list (video with audio, 11:59 minutes)
- 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 and Numbers 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:

- Import your guest list (video with audio, 11:59 minutes)
- Example import formats
- Import guests in couples/families/groups

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- Import proximity data
- Import seating data
- Importing guests from Excel files
- **Quick Add Guests** window
- Import guests tutorial

2.2.4 Importing guests from vCard files

PerfectTablePlan can import guest information from vCard files. Many types of applications can export contact information in vCard format, including personal organizers and email packages such as Apple AddressBook.

To import guest information from a vCard file:

- drag the vCard(s) files (extension .vcf) onto the **Guests** pane or **Groups** pane; or
- select **File>Import**, choose **vCard file** and click **OK**. Select the vCard file to import and click **Open**

In some 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

PerfectTablePlan has been tested with vCard version 2.1, 3.0 and 4.0 formats. It expects version 2.1 vCards to be encoded in ASCII and version 3.0 or 4.0 vCards to be encoded in UTF-8.

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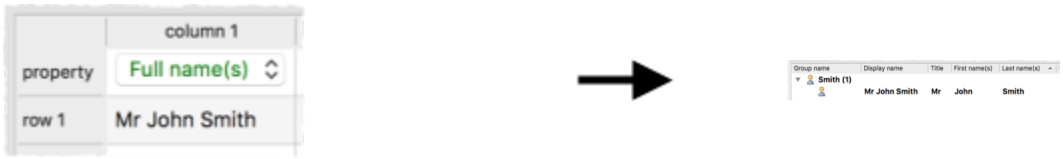
See also:

- Importing guests from Excel files
- Importing guests from text and CSV files
- Import guest details from the Apple Address Book

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. We recommend setting up common titles and suffixes in the **Preferences** window before importing.

A single guest name per row in a single column



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 cell**.

If you want to import multiple guests per group you should add a group column.

A single guest name per row in multiple columns

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 cell**.

If you want to import multiple guests per group you should add a group column.

Multiple guest names per row in a single column

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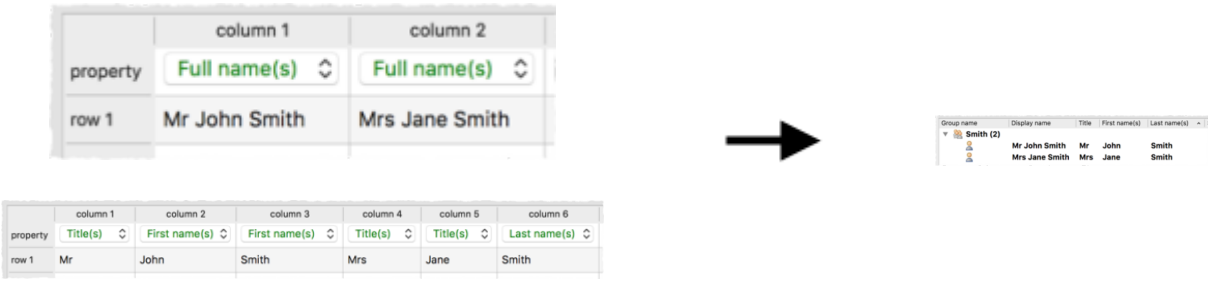
Various naming formats are handled, including:

```
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



The guests will all be placed into a single group.

Column for number of additional guests

The guests will all be placed into a single group.

Column for number of total guests

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The guests will all be placed into a single group.

If you get stuck on importing, contact support.

See also:

- Import your guest list (video with audio, 11:59 minutes)
- Import guests tutorial
- **Import Data** window
- Import guests in couples/families/groups
- Import proximity data
- Import seating data
- Joining and splitting columns

2.2.6 Merge import

Professional edition only

If guest information changes outside of PerfectTablePlan (for example in a CRM or event registration system) you can merge these changes into your current plan in various ways, rather than creating duplicate guest records.

Set **New guests** to:

- **Import** if you want to import guests that aren't already in the plan.
- **Don't import** if you want to ignore imported guests that aren't already in the plan.

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Set **Existing guests re-imported** to:

- **Import as updates (merge)** to merge guest records with matching guests already in the plan.
- **Import as duplicates** to create new guest records for every imported guest.
- **Don't import** to ignore guest records with matching guests already in the plan.

Set **Existing guests not re-imported** to:

- **Keep** if you want to keep guests that are already in the plan, but not re-imported.
- **Delete** if you want to delete guests that are already in the plan, but not re-imported.

If you import into a plan with existing guests, guests and groups are colour coded:

- Pink: Newly imported guests.
- Purple: Existing guests that are being re-imported.
- Blue: Existing guests that are not being re-imported.

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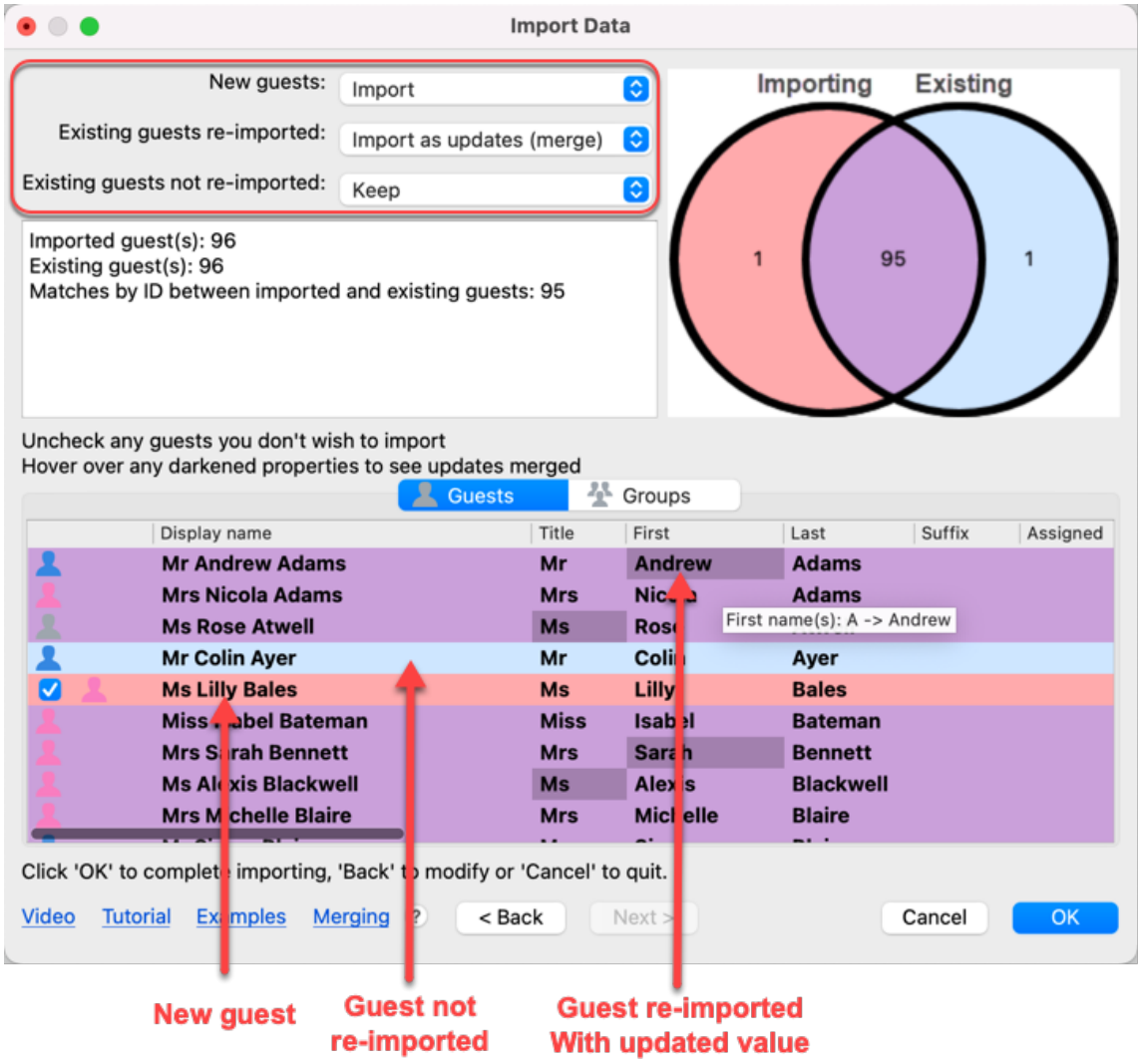

Matching between existing and imported guests can be by either:

- unique guest ID, matching that previously imported; or
- guest first name + last name (case insensitive)

If you don't import an **ID** column, then the first name + last name will be used. Unique guest Ids are preferred, as it allows you to merge changes in guest names and also handles guests with duplicate names (you might legitimately have two guests with the same name).

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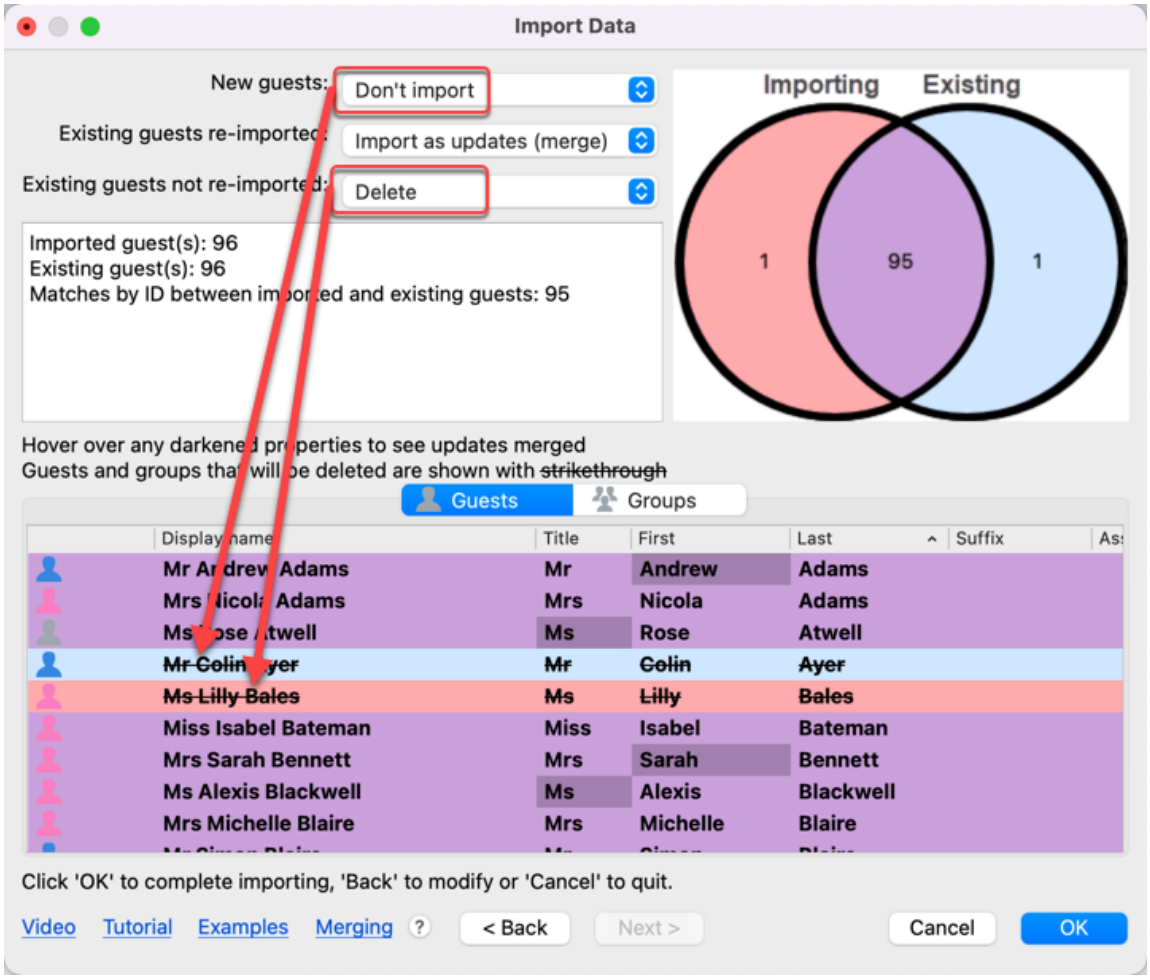
It is recommended to import a **Group** column, to control how guests are merged into new and existing groups.

During merge import, any imported values will overwrite previous values. Existing proximity values that are not overridden are kept. You should delete all proximities before import if you want to import proximities from scratch.

Guest fields that will be updated from a merge import are shown in a darker purple. Hover over the field to see what the change is. E.g. if Andrew Adams has meal 'beef' and then Andrew Adams is re-imported with meal 'fish', then the existing Andrew Adams guest will have their meal value updated from 'beef' to 'fish'. This will be shown with a darker colour and a tooltip.

Guests that will be deleted after the import is complete, e.g. due to setting **New Guests** to **Don't import**, are shown with strikeout text.



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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.

First name(s) is the guest's first (given) name(s). You can also record middle names or initials, if you wish.

Last name(s) is the guest's last (family) name(s). If the last name contains particules (e.g. the 'da' in 'da Vinci') these can be specially handled.

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').

You can configure titles and suffixes in the **Preferences** window - this can be particularly useful for military ranks, Masonic titles etc.

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 are adding guests via the **Insert** menu and have checked **automatically capitalise new 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 override this for each guest.

You can use HTML tags to control the appearance of the guest **Display name** field. For example:

```
John <b>Smith</b><br><small><i>Director</i></small>
```

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See also:

- Adding and removing dots at the end of titles
- Customize standard guest titles
- Handle post-nominal titles
- Use particules in names
- Turn on/off guest name capitalisation

2.4 HTML tags

2.4.1 HTML tags

You can use the following HTML tags to control how the guest **Display name** field appears in the **Floor Plan**, **Table Plan**, **Table chart** and **Guest chart** panes:

HTML tag	Syntax
Line break	
Bold	...
Italic	...
Big	<big>...</big>
Small	...

Only the <br> tag is taken account of in the **Stationery** pane.

For example:

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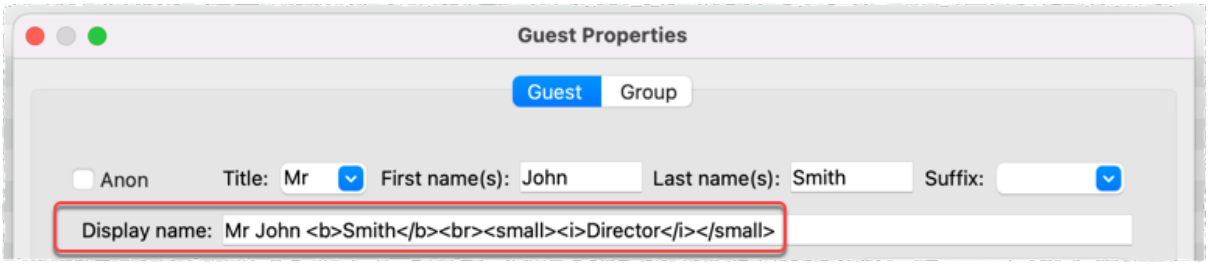
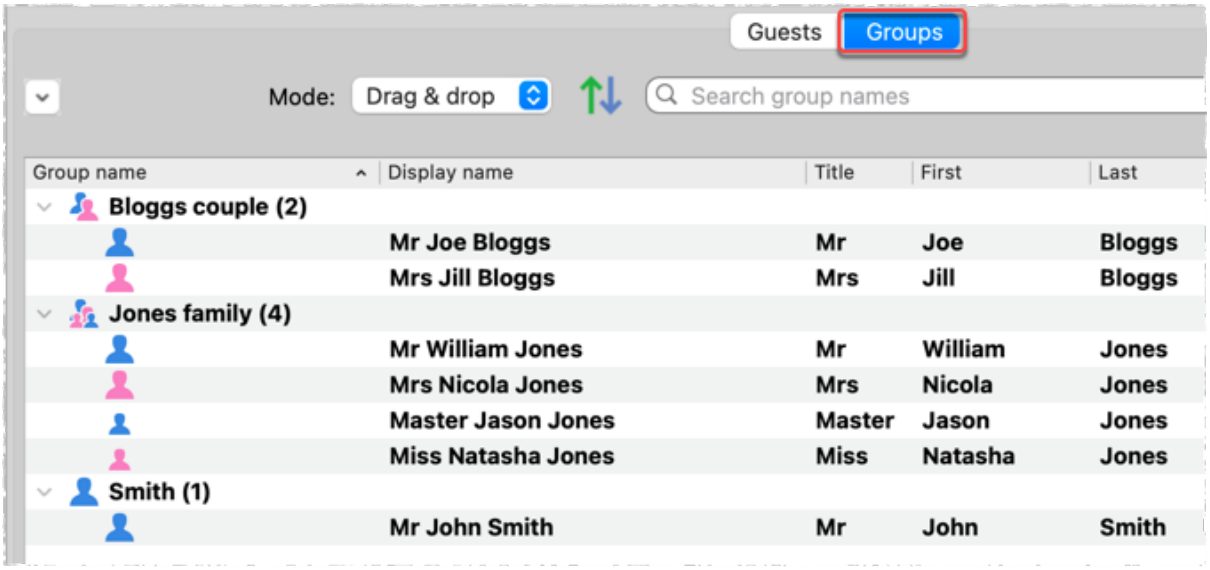


Is shown in the **Floor Plan** pane as:

2.5 Groups

2.5.1 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...**.

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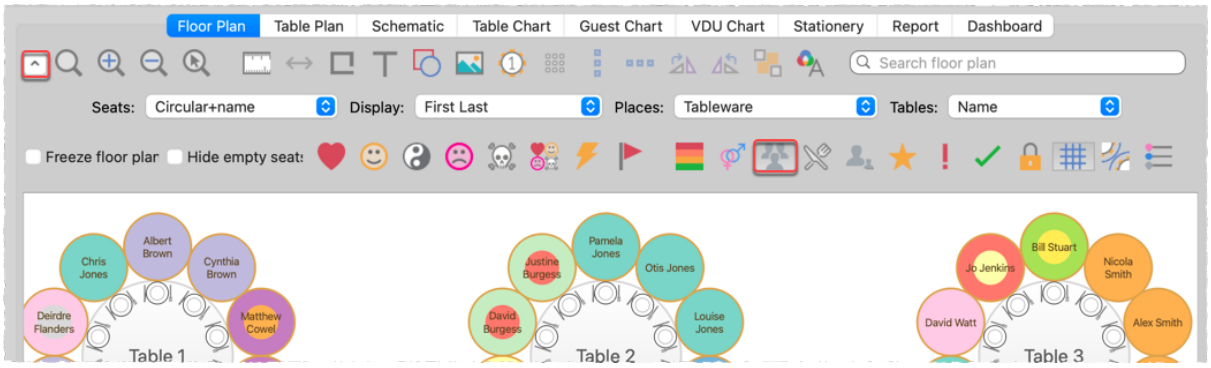
You can drag a whole group to the **Floor Plan**, **Table Plan** or **Schematic** panes by either:

- 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
- Change the order of guests in a group
- Move guests from one group to another
- Organize guests by company/organization

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2.6 RSVP status

2.6.1 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.

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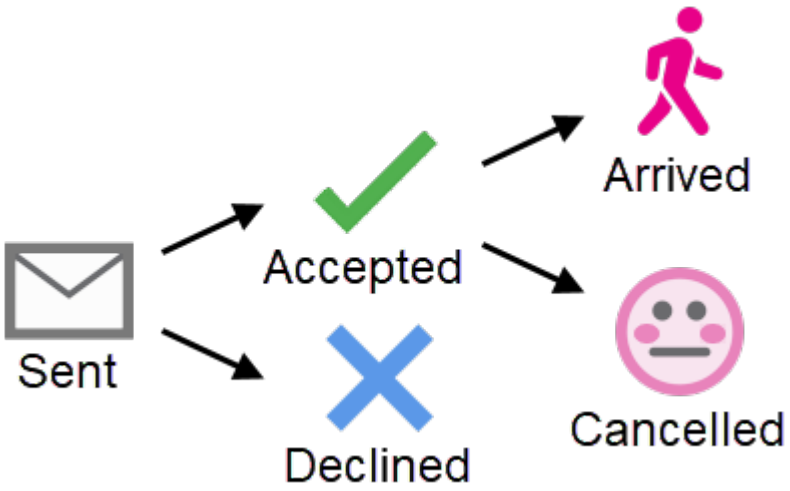

RSVP workflow

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 or Dashboard pane. You can estimate guest numbers and budget from RSVP status in the **Numbers and Budget** window.

See also:

- Edit a property for multiple guests

2.7 Meal selection

2.7.1 Meal selection

You can record guest meal selections in the **Meal** field of the **Guest properties** window. You can either select an existing meal choice from the drop-down list or type a new meal choice.

If you have multiple courses you can separate them by commas.

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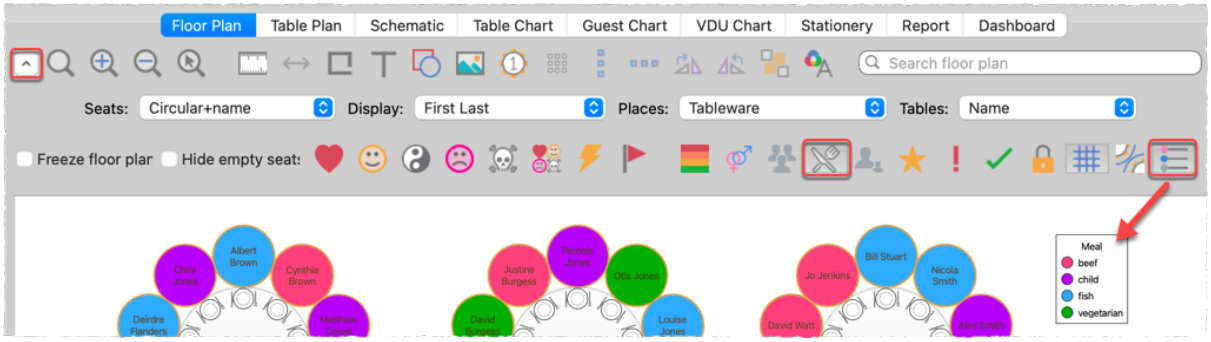
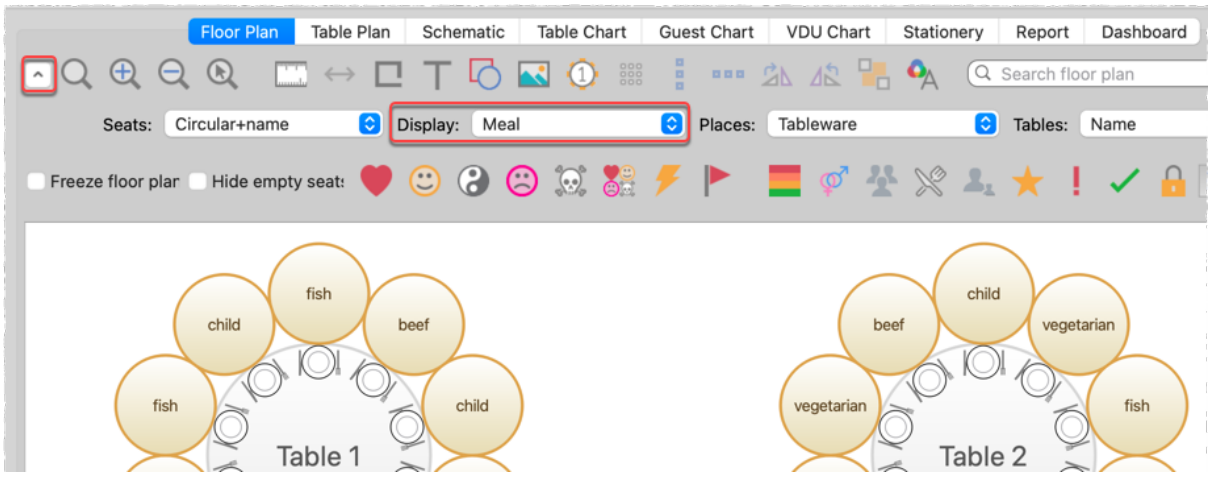
The drop-down list is created automatically from all the meal choices in the current plan and you cannot edit it directly.

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. You can change the colours used in the **Visualization colours** window.



Displaying meal selection using colour coding in the Floor Plan pane



Displaying meal selection as text in the Floor Plan pane

Advanced and Professional editions only

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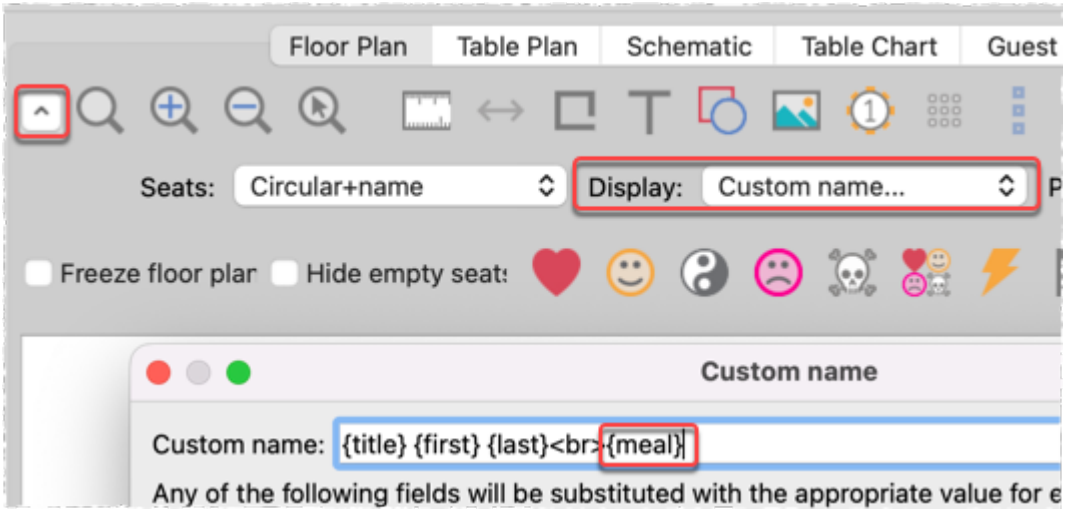
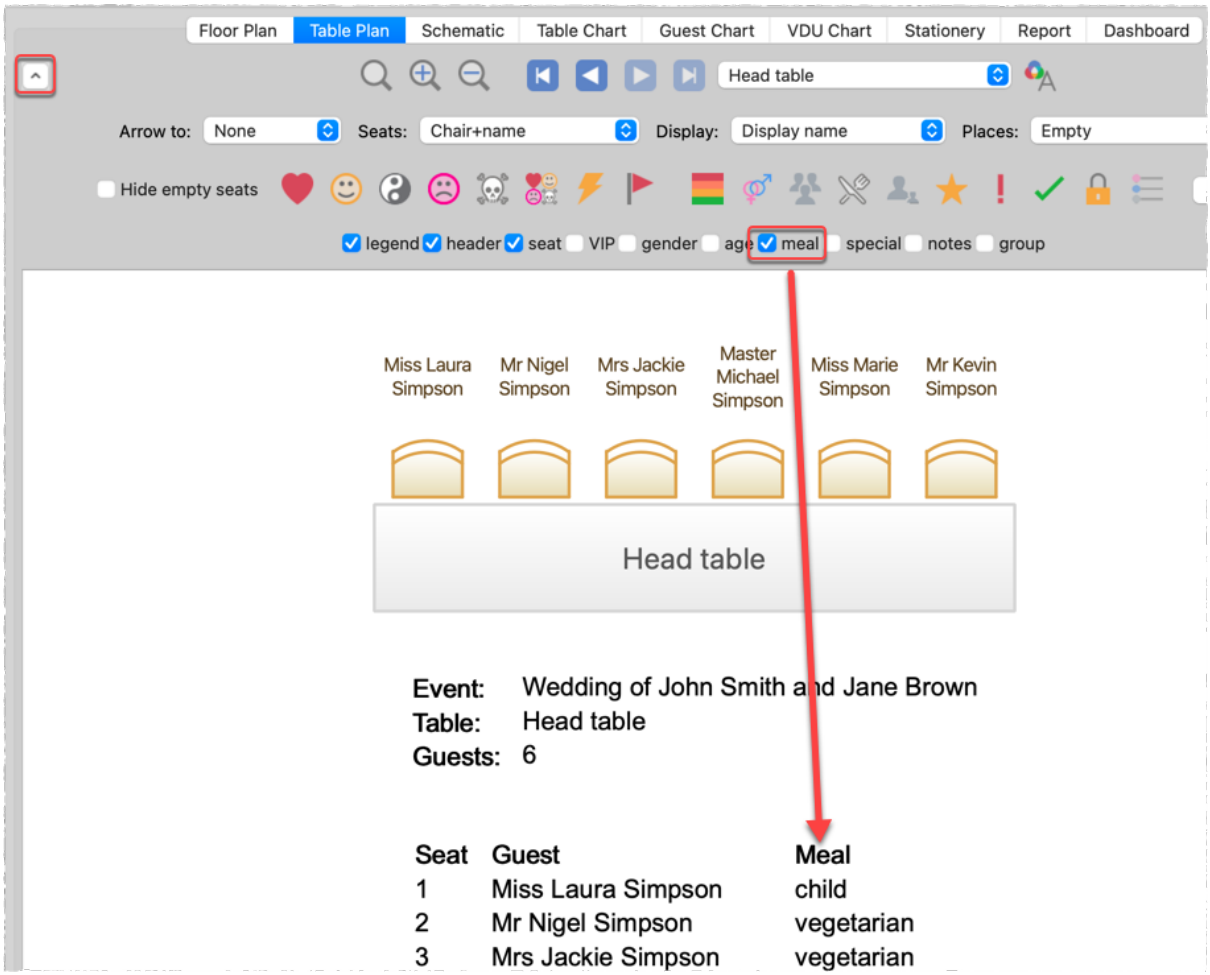


Displaying the meal as part of custom naming in the Floor Plan pane



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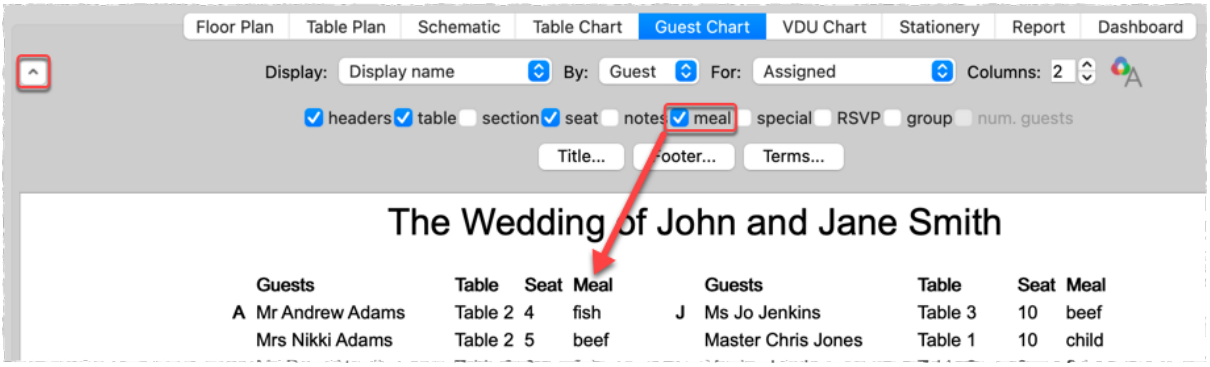
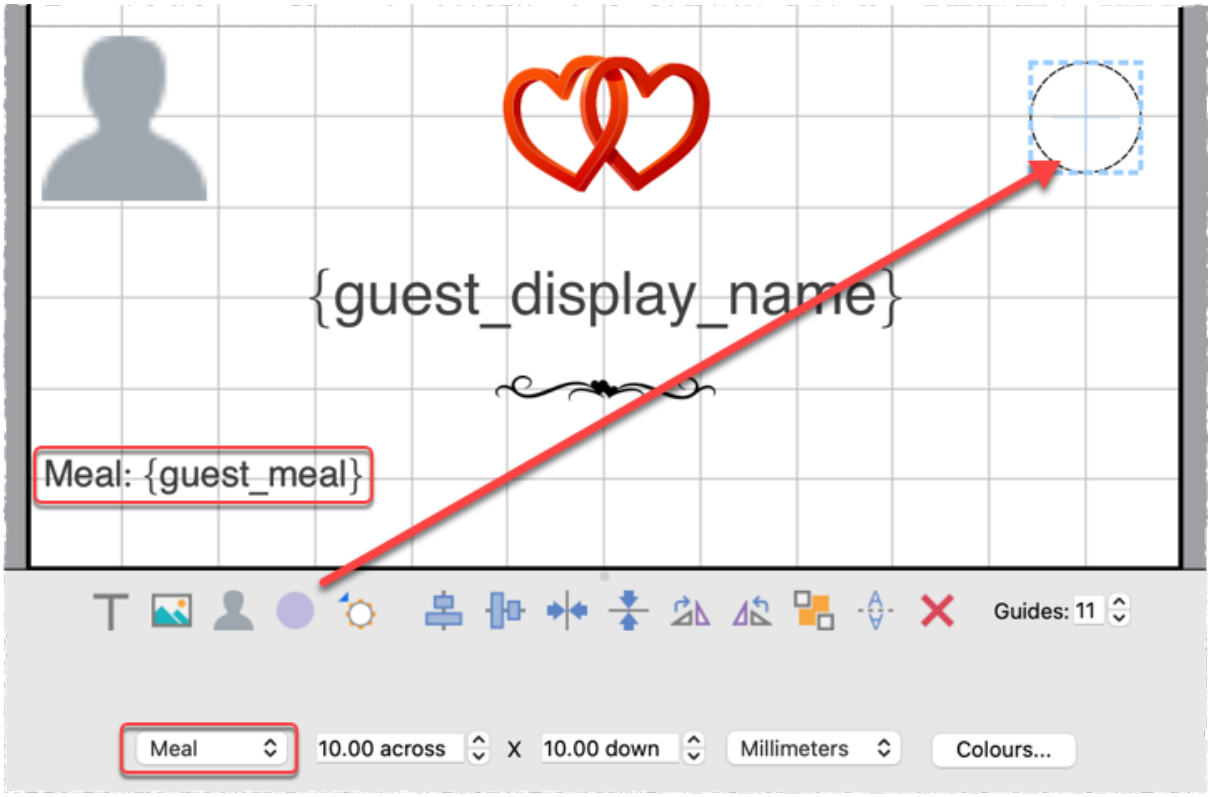
Displaying meal selection in the Table Plan pane (you can also click the Meal icon or select Meal from the Display drop-down list)



Displaying meal selection in the Guest Chart pane



Displaying meal selection in the Stationery pane

You can add coloured spots representing meal choices to place cards and other stationery.

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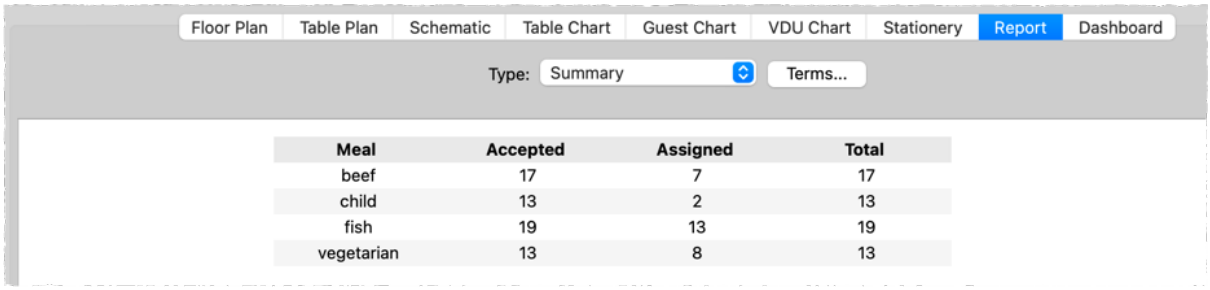
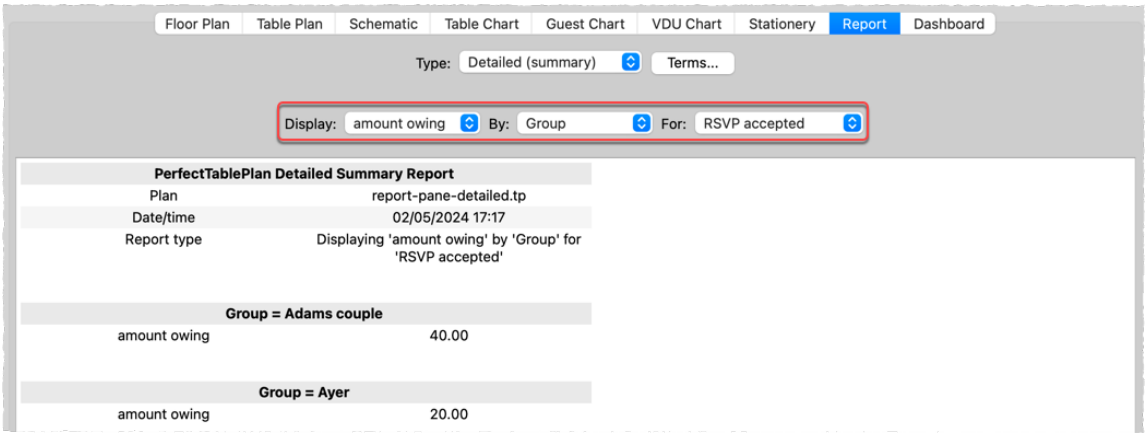


Summarising meal selections in the Report pane

Professional edition only

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



Summarising meal selections by table in the Report pane

See also:

- Edit a property for multiple guests

2.8 Special requirements

2.8.1 Special requirements

You can record guest special requirements, such as food allergies or mobility restrictions, in the **Special Req.** field of the **Guest properties** window. You can either select an existing special requirement from the drop-down list or type a new special requirement.

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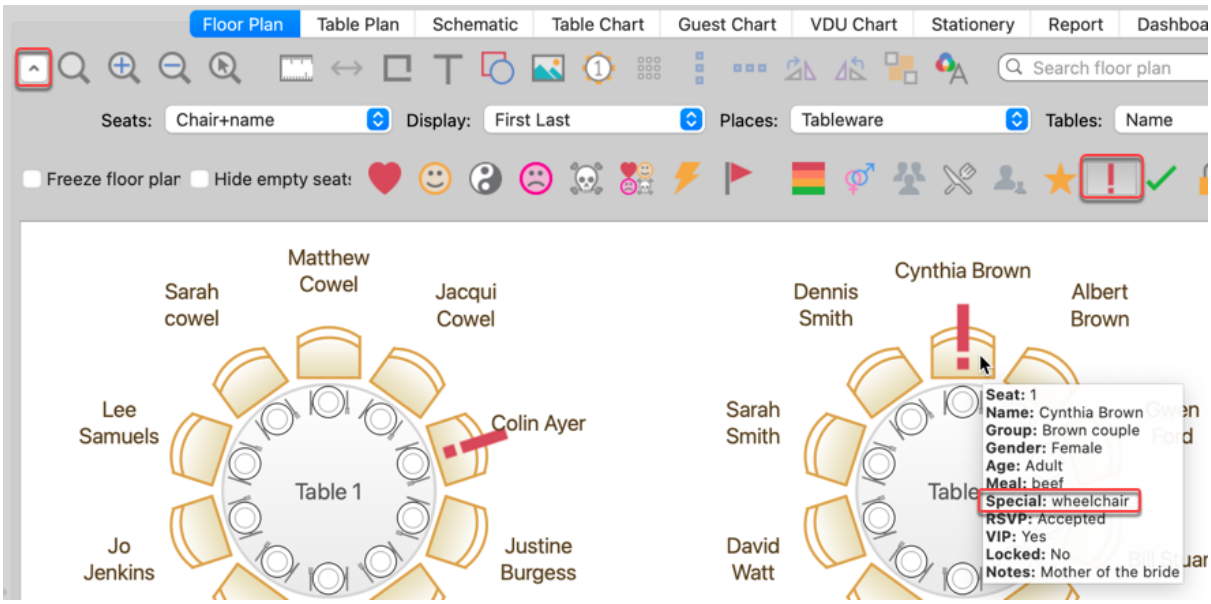
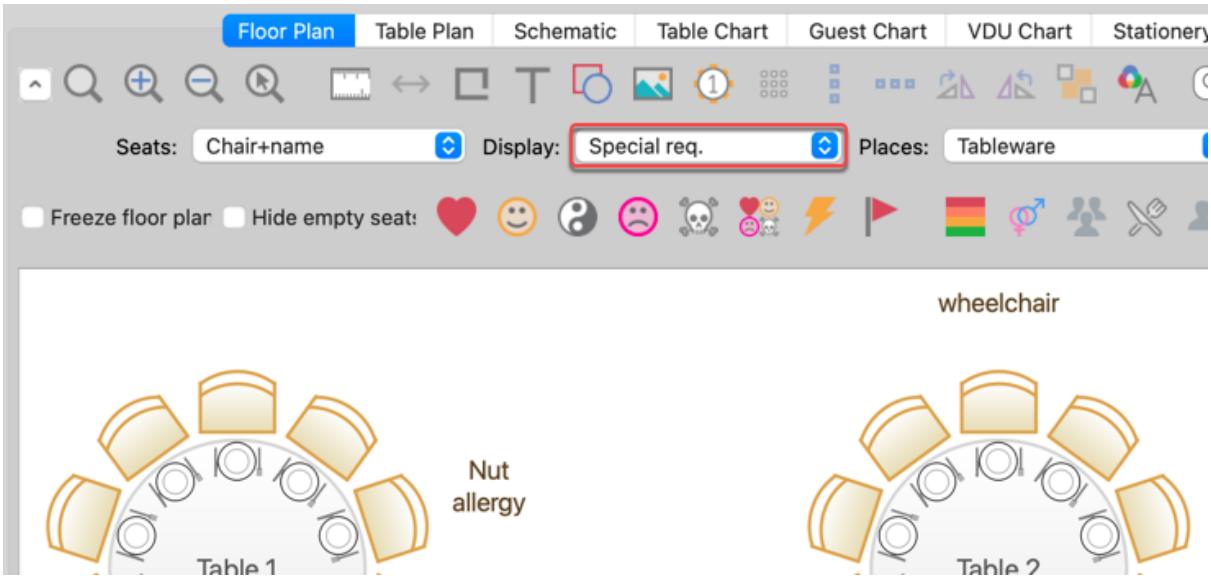
The drop-down list is created automatically from all the special requirements in the current plan and you cannot edit it directly.

Special requirements can be displayed in the **Floor Plan**, **Table Plan**, **Table Chart**, **Guest Chart**, **Stationery** and **Report** panes.



Displaying special requirements using icons in the Floor Plan pane



Displaying special requirements as text in the Floor Plan pane

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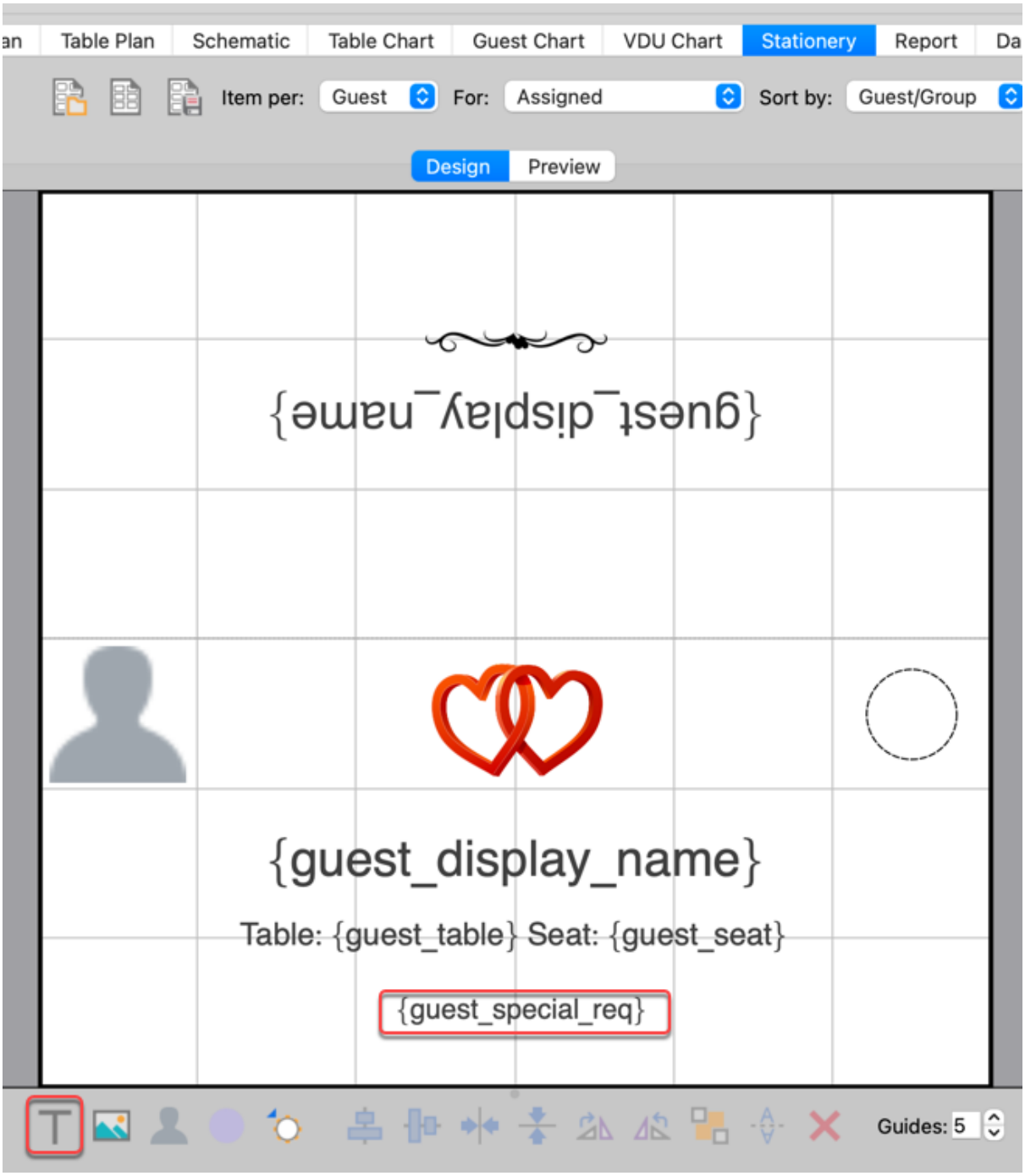

Displaying special requirements in the Stationery pane

Professional edition only

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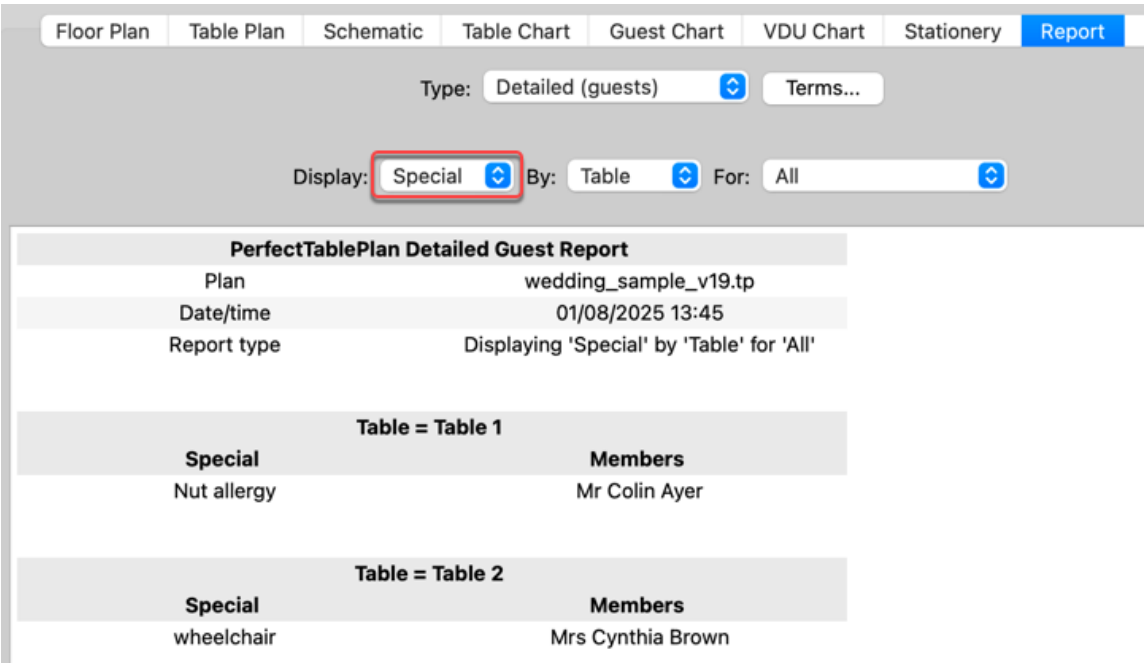
You can report special requirements by table, group or other property in the Σ**Report** pane.



Summarising special requirements by table in the Report pane

See also:

- Edit a property for multiple guests

2.9 Custom fields

2.9.1 Custom fields

Advanced and Professional editions only

PerfectTablePlan comes with a number of standard fields: First name(s), Last name(s), 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.

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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
Number	Any whole number (integer).	Bottles of wine ordered
Currency	Any floating point number. Accurate to two decimal places.	Amount owing
Selection	One of a comma separated list of items.	Employer
Tags	0, 1 or many comma separated items.	Languages spoken

For example you might create a:

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

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

Custom fields affect PerfectTablePlan in the following ways:

Guests pane and Groups pane

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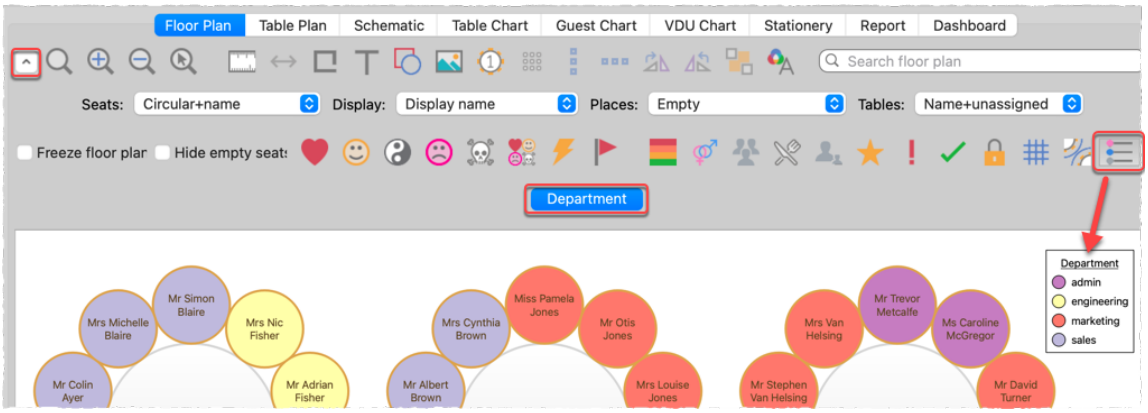
An additional column appears for each custom field. You can show/hide these fields by clicking on the button and checking/unchecking the appropriate box.

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 **Display** drop-down list.

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

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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

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Custom fields values can be exported.

See also:

- Add custom fields
- Edit a property for multiple guests

2.10 Table shapes

2.10.1 E-shaped table

Advanced and Professional editions only

An E-shaped table comprises a top section and between 2 and 25 sprig sections.

Add an E-shape table using **Insert>E-shaped Table...** .

Click on the **Sections** button in the **Table Properties** window to change the number of sprig sections and/or the size of sections in the **Table Section properties** window.

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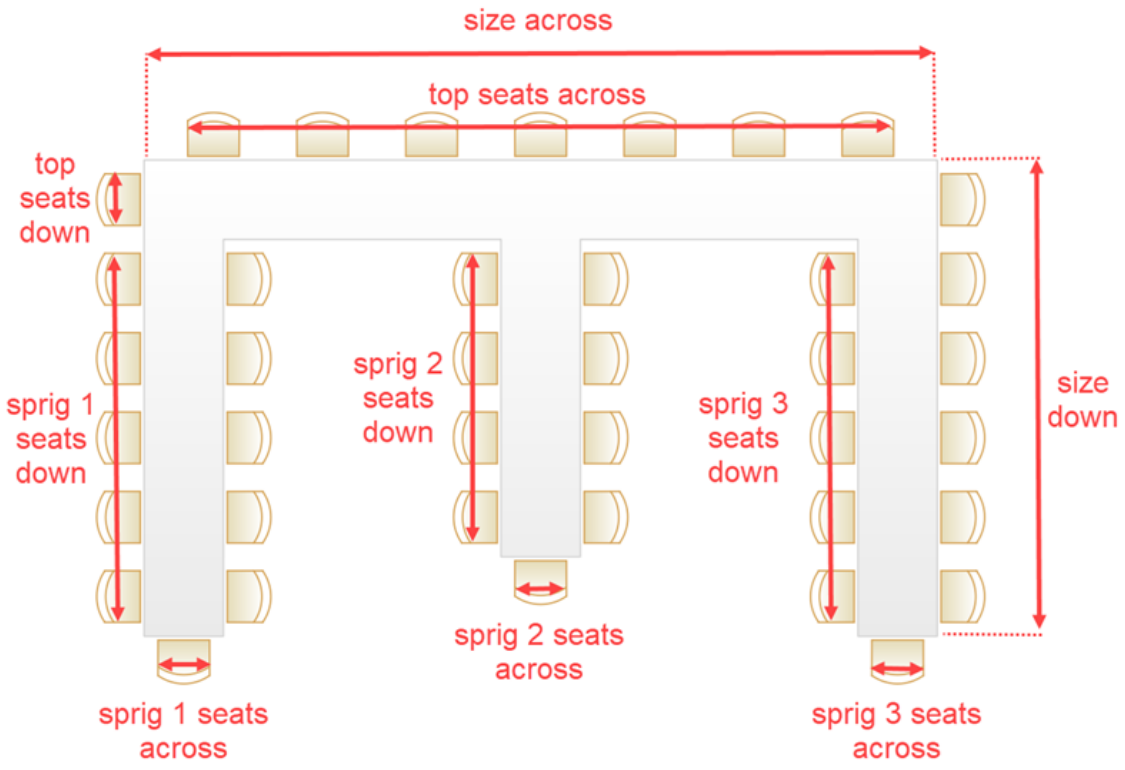

Uncheck **all sections left-right symmetrical** if you want to set different numbers of seats down 2 sides of a section.

Check **by section** if you want to number the seats in each section separately.

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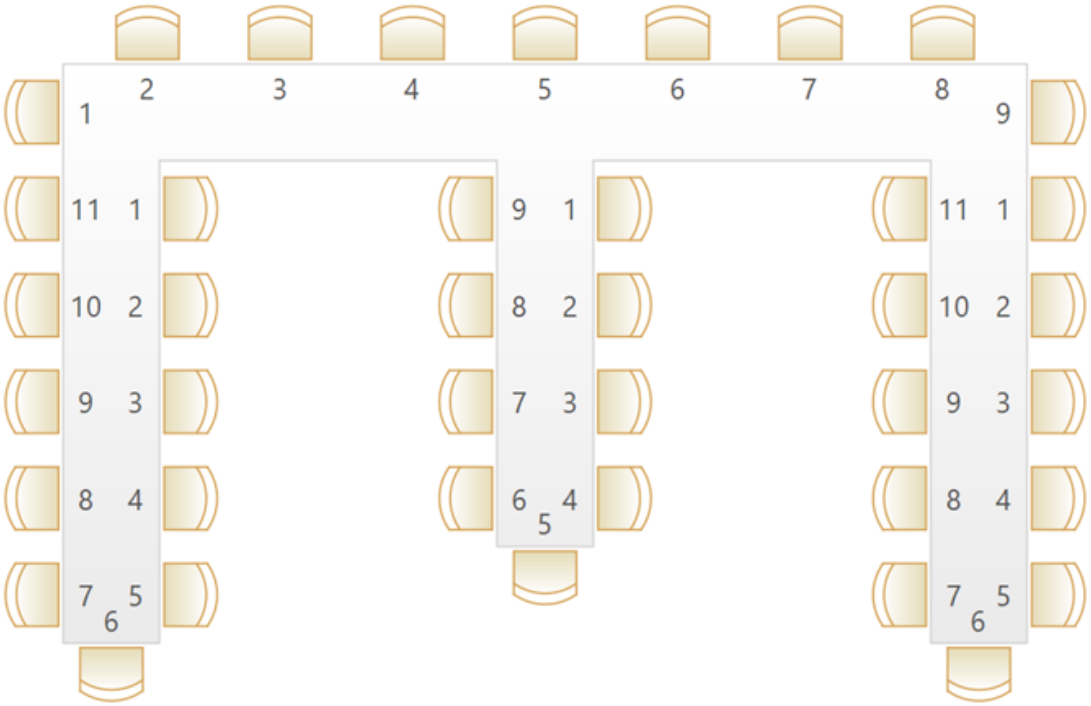

If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

See also:

- Create an E-shaped table

2.10.2 Rectangular table

A rectangular table has seats on 4 sides, with the same number of seats on opposite sides.

Add a rectangular table using **Insert>Rectangular Table...** .

Set seats **across** = seats **down** for a square table.

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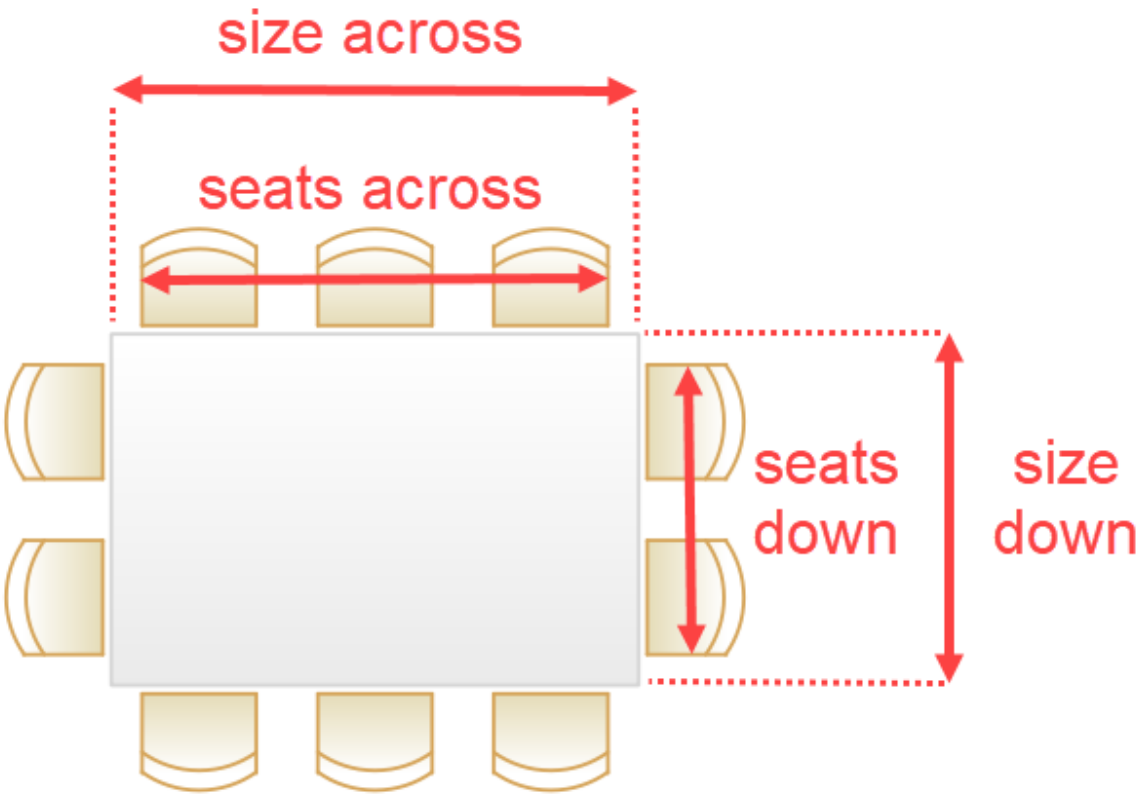

If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

If you want different numbers of seats on opposite sides, use a custom table.

2.10.3 Banquet table

A banquet table is a rectangle with an equal number of seats on 2 opposite sides.

Add a banquet table using **Insert>Banquet Table...** .

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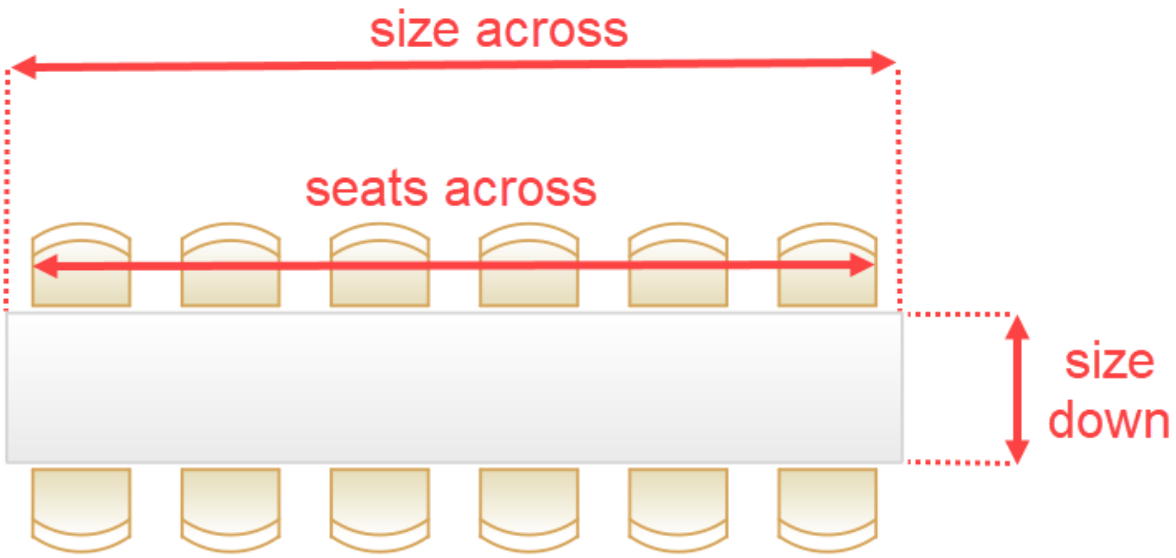


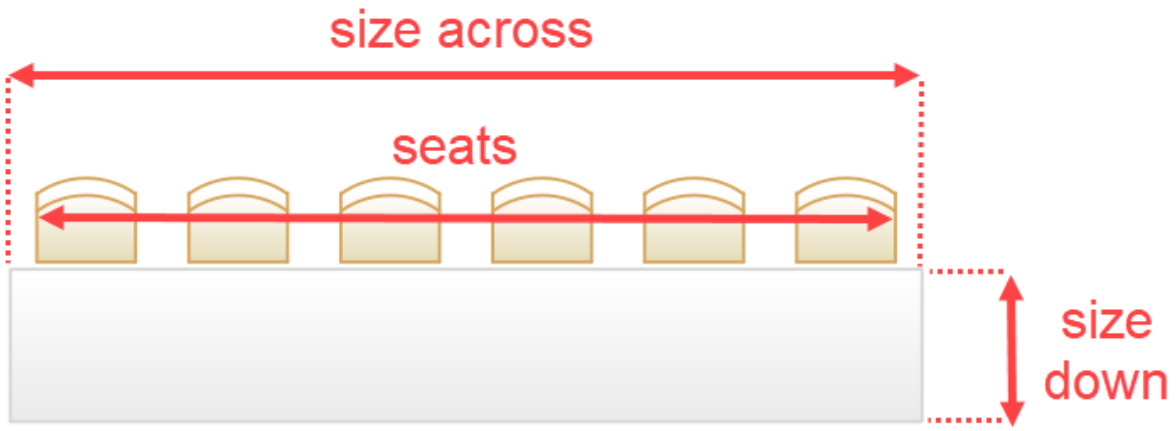
If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

If you want different numbers of seats on opposite sides, use a custom table.

2.10.4 Head table

A head table is a rectangle with seats on 1 side.

Add a head table using **Insert>Head Table...** .



If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

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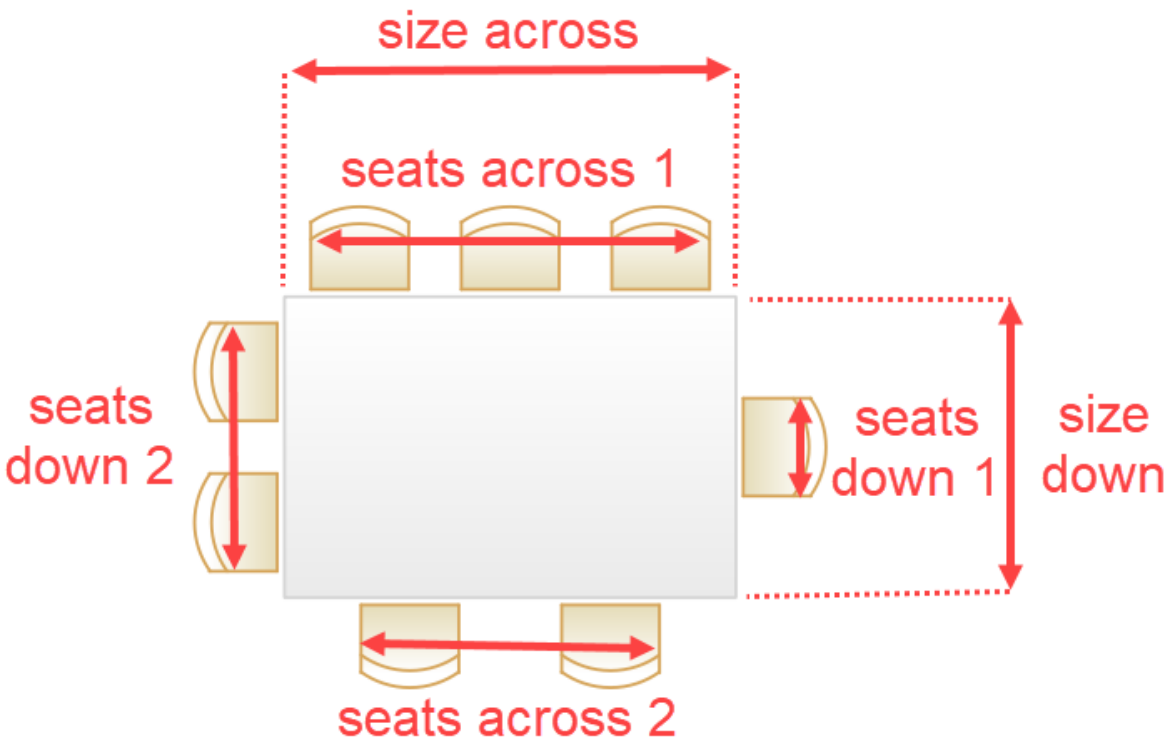
2.10.5 Custom table

A custom table is a rectangle where you can set the number of seats on each of the 4 sides independently. It can also have curved table ends.

Add a custom table using **Insert>Custom Table...** .



To add round ends set **End 1 curve** and **End 2 curve** to the appropriate degree of curvature (0 degrees=no curve, 180 degrees=maximum curve).

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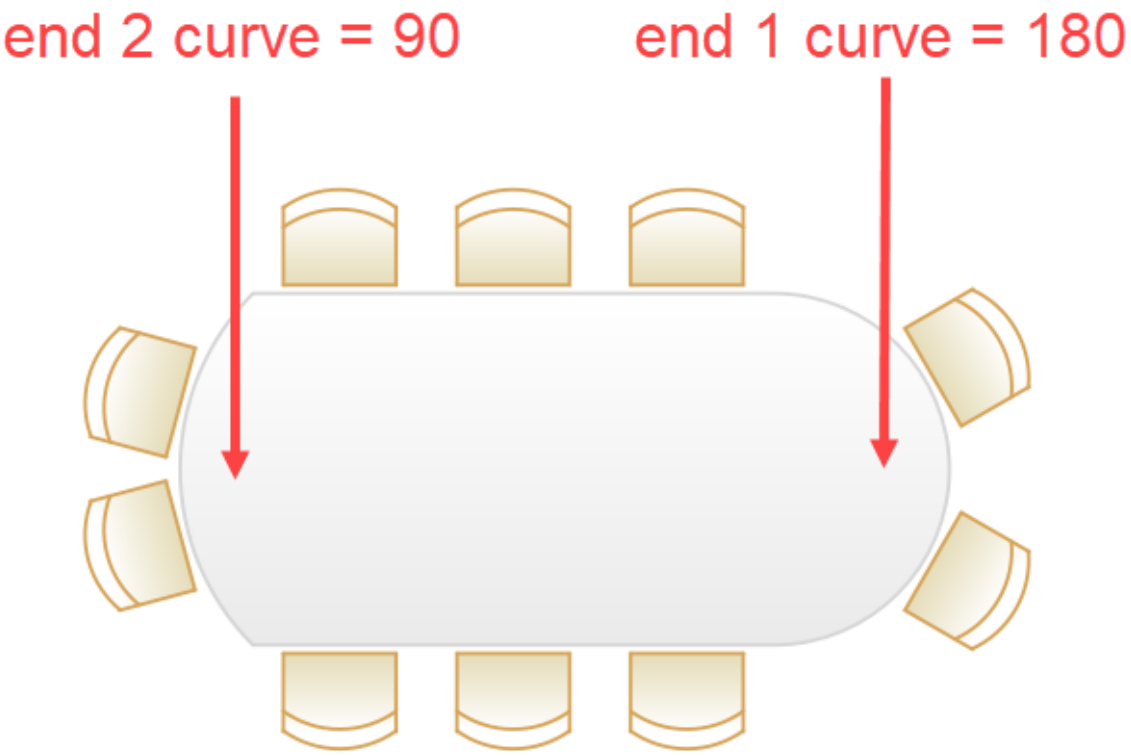

If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

2.10.6 Circular table

A circular table is a circle with seats all around.

Add a circular table using **Insert>Circular Table...** .

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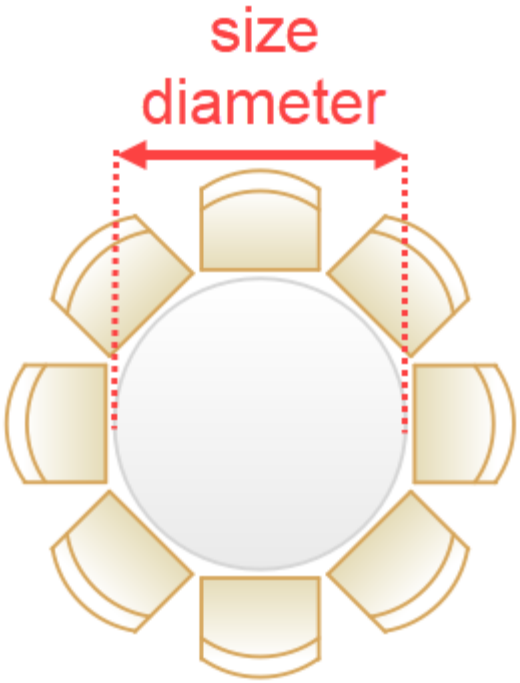
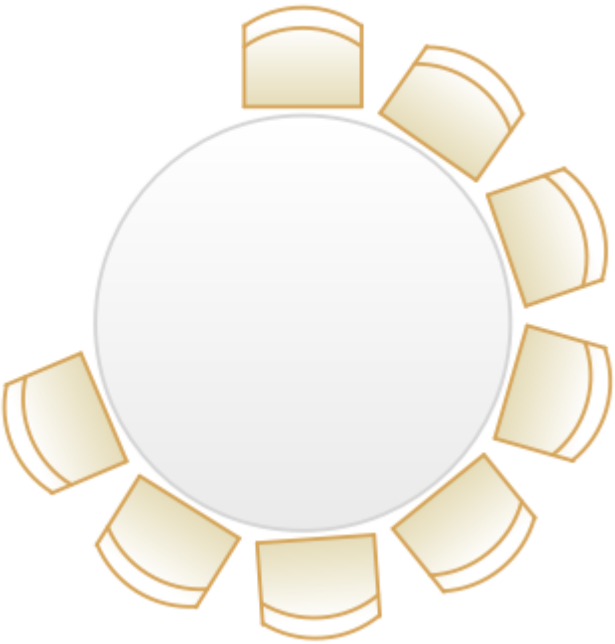


If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

Set the table diameter larger than the **auto** size and uncheck **space seats evenly** for cabaret style seating.



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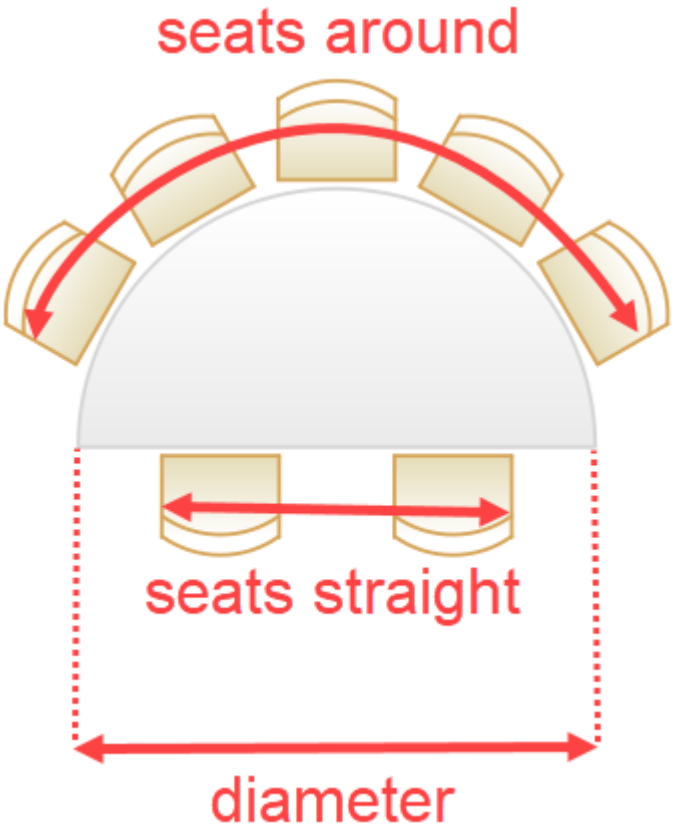
See also:

- Create sweetheart/cabaret style tables

2.10.7 Semi-circular table

A semi-circular table is a semi-circle (D-shape) with seats on 2 sides.

Add a semi-circular table using **Insert>Semi-Circular Table...** .



If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

See also:

- Serpentine table

2.10.8 Oval table

An oval table is an ellipse with seats all around.

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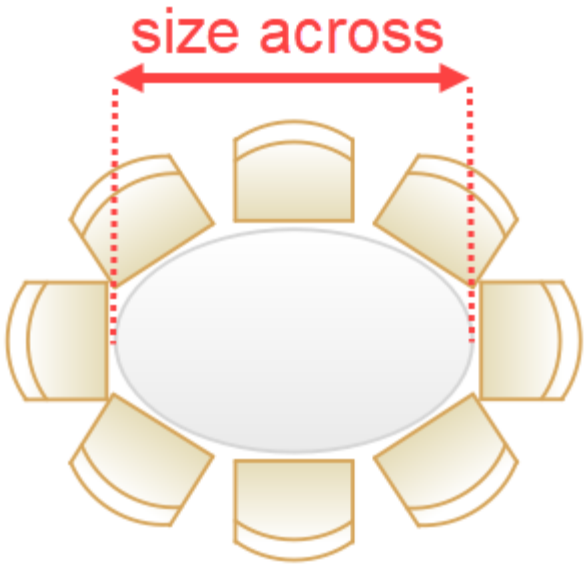
Add an oval table using **Insert>Oval Table...** .



If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

2.10.9 Serpentine table

Advanced and Professional editions only

A serpentine table is a 180 degree curved table (C-shape) where you can set the number of seats on each of the 4 sides independently.

Add a serpentine table using **Insert>Serpentine Table...** .

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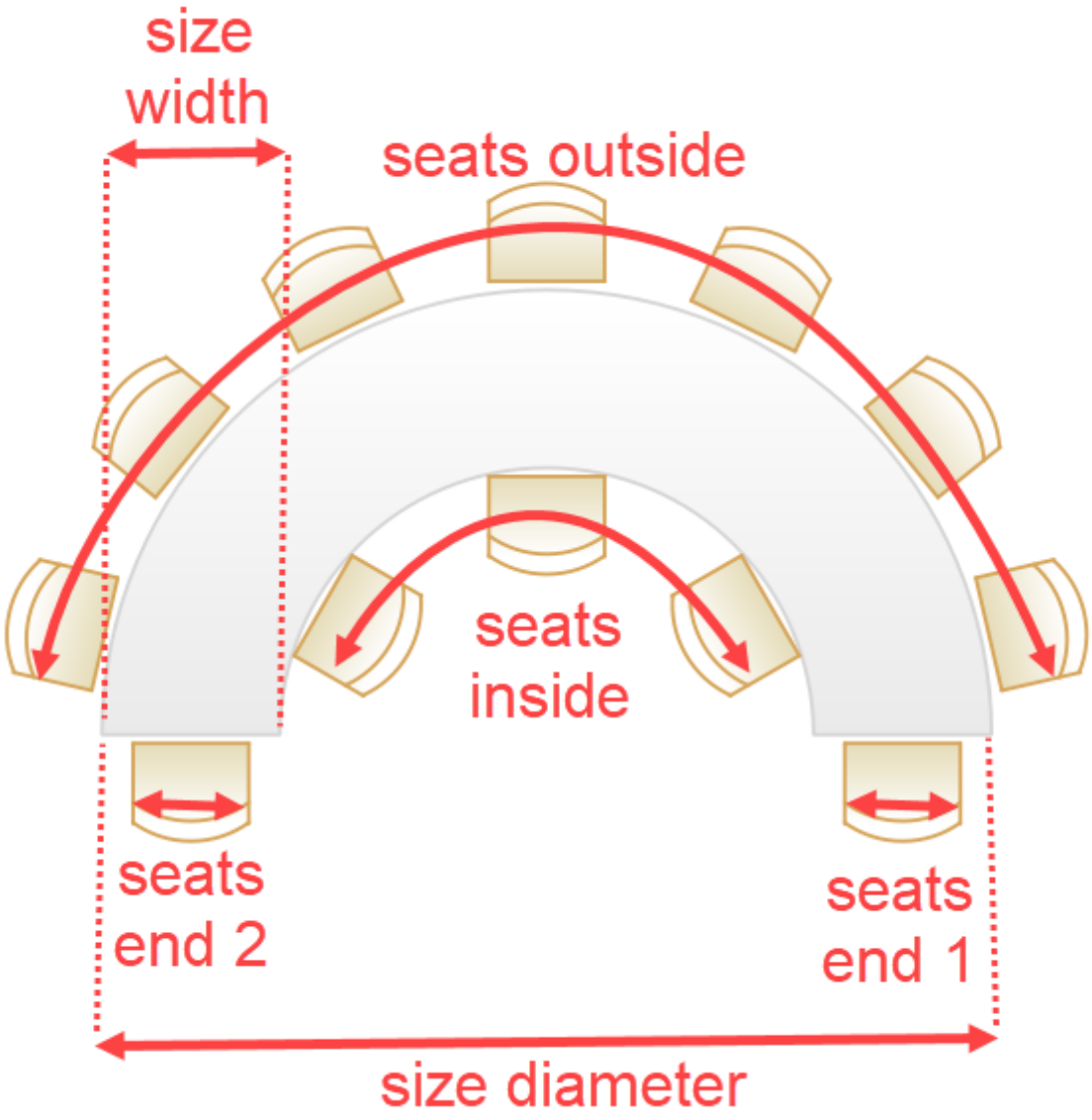

If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

See also:

- Half serpentine table
- Semi circular table

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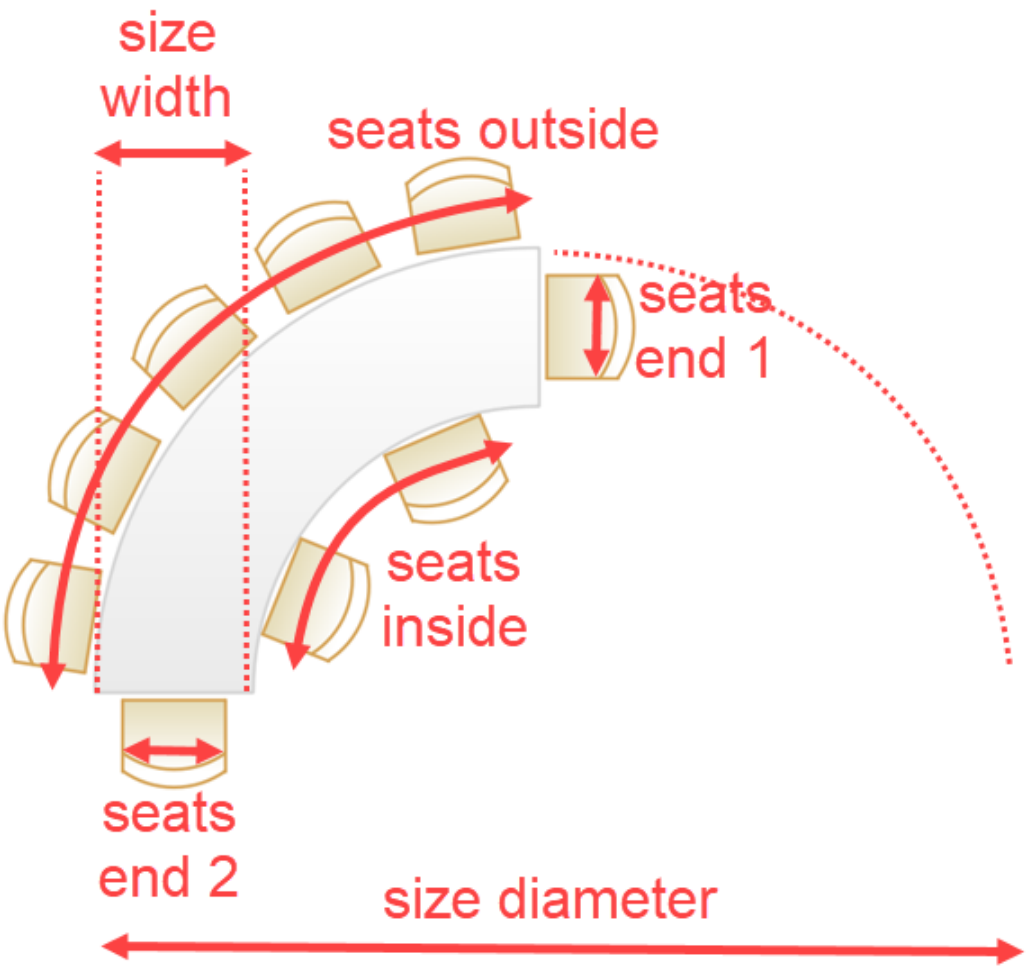
2.10.10 Half serpentine table

Advanced and Professional editions only

A half serpentine table is 90 degree curved table (half of a serpentine table) where you can set the number of seats on each of the 4 sides independently.

Note that diameter is the diameter the table would have if it was a full circle.

Add a serpentine table using **Insert>Half Serpentine Table...** .



If **auto** is checked the table size will be automatically adjusted to the number and size of seats.

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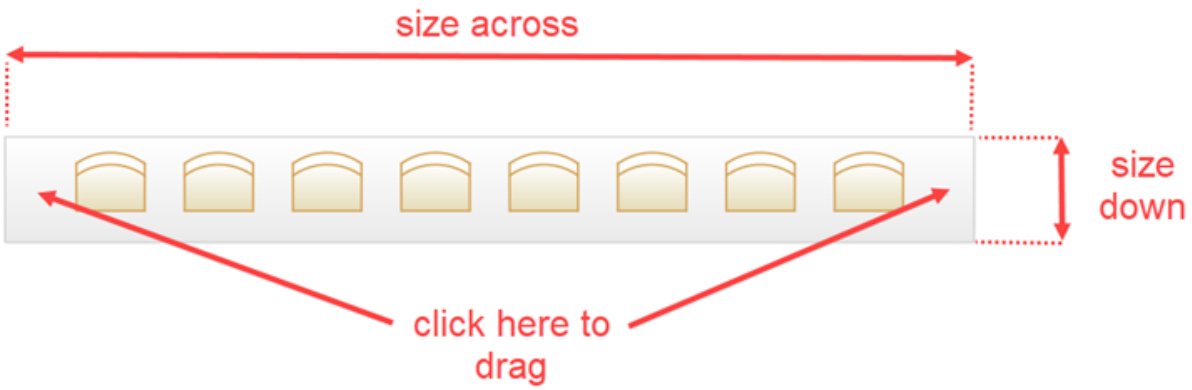
See also:

- Serpentine table

2.10.11 Row of seats

A row of seats is a straight or curved row of seats with no table.

Add a row of seats using **Insert>Row of Seats...** .



To drag a seat row, click on either end of the row (not the seats).

For a curved row of seats set **Curve** to a non-zero value.

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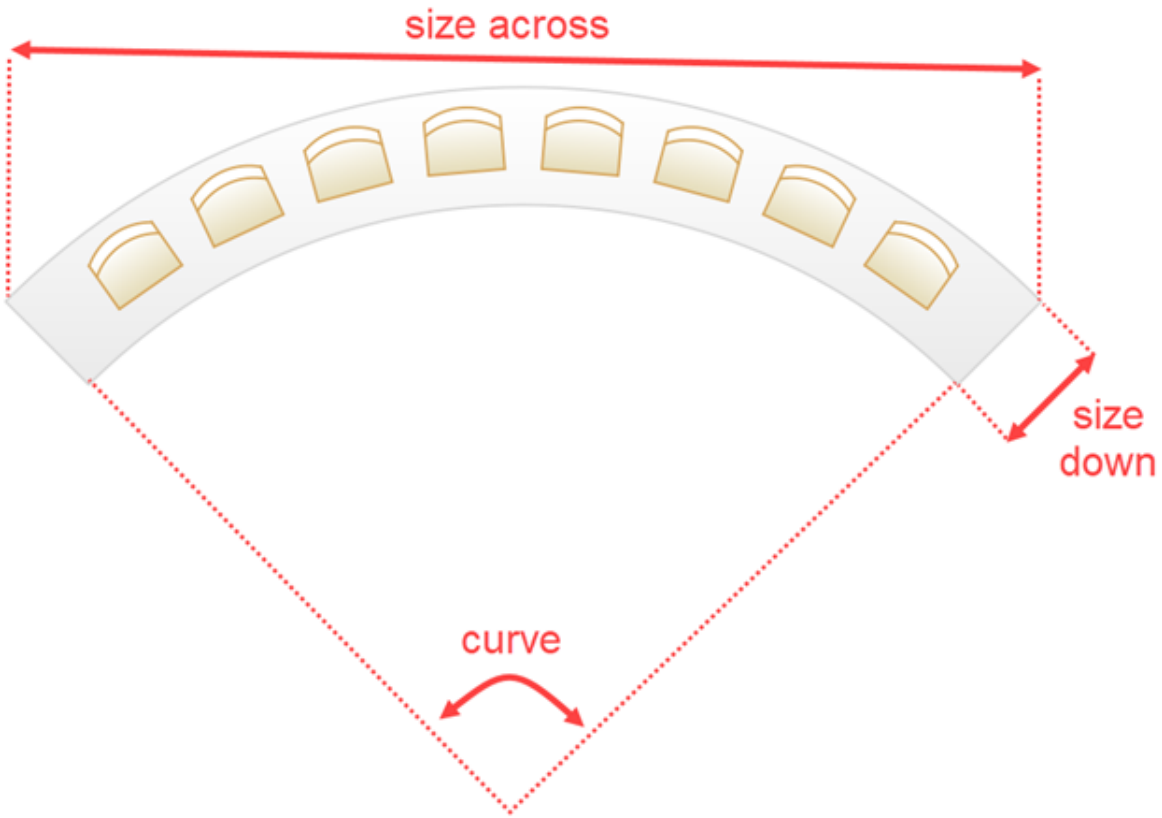

The curvature can vary between 0 and 180 degrees.

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If **auto** is checked the seat row will be automatically adjusted to the number and size of seats.

2.11 Proximity

2.11.1 Proximity

You can use proximity to tell PerfectTablePlan where you want pairs of guests to sit, relative to each other.

The available proximities are:

Proximity	Meaning
Next to	Try to place in descending order of preference: 1) in adjacent seats, 2) on the same table, 3) on a nearby table.
Near to	The same as **Next to**, but not as strongly weighted (**Next to** gets priority).
Near not next to	Try to place in descending order of preference: 1) on the same table, but not at adjacent seats, 2) on a nearby table.
Neutral	It isn't important where these guests are placed relative to each other.
Not Next to	The same as **Not near to**, but not as strongly weighted (**Not near to** gets priority).
Not Near to	Try to place in descending order of preference: 1) on a different table that isn't nearby, 2) on a different table.

Professional edition only

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You can also set proximity rules for custom fields of type **Selection** or **Yes/No**. E.g. to put guests of particular types or categories together or apart.

See also:

- Automatic assignment by guest proximity
- Proximity pane
- Proximity Preferences

2.12 Seat assignment

2.12.1 Seat assignment

Guests can be assigned to seats by:

- automatic seat assignment; and/or
- dragging and dropping guests or groups onto seats

You can check you have enough seats by looking at the **Status** bar.

To get the best results it is often 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.

Assigning multiple seatings

PerfectTablePlan Professional edition can assign multiple seatings in a single operation (e.g. when you have an event where you want guests to sit with different people for every meal or course).

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:

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- 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 guests to seats (video with audio, 13:01 minutes)
- Assign (or reassign) seats in real time
- Check where a guest is seated across multiple seatings
- Check who a guest was seated next to at previous events
- Arrange multiple seatings for an event

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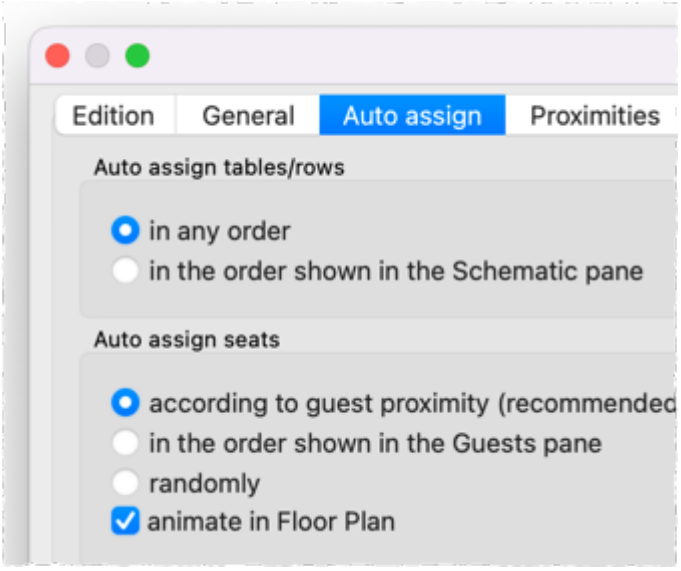
2.12.2 Automatic seat assignment

PerfectTablePlan will do an automatic seat assignment if you select **File>Auto Assign Seats** or the equivalent **Main** tool bar button.

Set the **Auto assign** tab of the **Preferences** window to automatically assign seats:

- according to proximities you have set; or
- according to the current order of guests in the Guests pane; or
- randomly



See also:

- Assign guests to seats (video with audio, 13:01 minutes)

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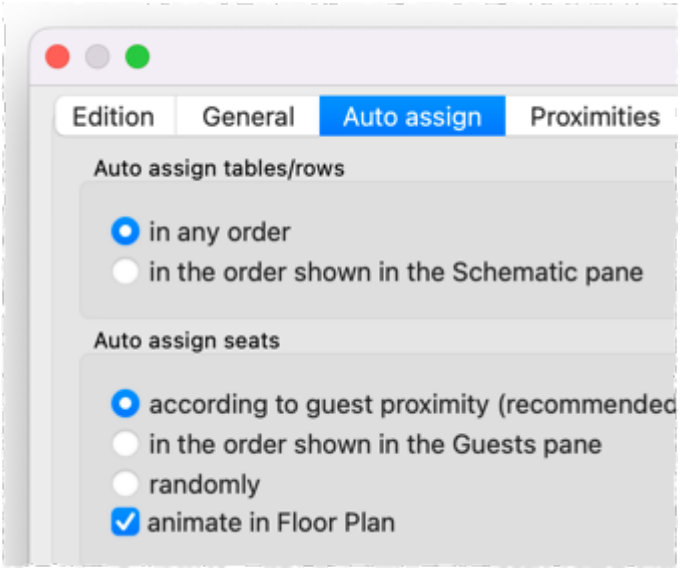
2.12.3 Automatic assignment by guest proximity

If you have set **Auto assign seats** to **according to guest proximity** in the **Auto assign** tab of the **Preferences** window, then PerfectTablePlan will try to automatically assign guests to seats according to their proximities. This is useful when trying to seat particular groups of people together.



It will attempt to:

- put people near to (or not near to) each other, according to your settings in the **Proximity** pane
- not leave empty seats between guests (depending on your choice for **social distancing** in the **Preferences** window)
- alternate males and females (depending on your choice for **alternate males and females** in the **Preferences** window)
- seat guests opposite or next to each other on narrow (e.g. banquet and E-shaped) tables (depending on your choice for **On narrow tables prefer near to/next to guests seated** in the **Preferences** window)
- seat males to the left/right of females (depending on your choice for **Prefer next to guests seated** in the **Preferences** window)
- assign VIP guests to VIP tables
- prioritise VIP guests

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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 or have the wrong RSVP status (depending on the **Allow seat assignment with RSVP** settings in the **Preferences** window) will not be (re)assigned by 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.

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.

Table assignment order

The order in which guests are assigned to tables/rows is set in the **Auto assign** tab of the **Preferences** window:

- Set **in any order** to try filling the tables in different orders. This gives the automatic seat assignment the best chance to maximize the score, so is usually recommended.
- Set in **the order shown in the Schematic pane** to fill tables in the order shown in the **Schematic** pane. You can change this order.

Scoring

A plan is scored as follows:

Criterion	Score

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❤️ Next to proximity guests on adjacent seats *[1]*	+20 *[2]*
🙂 Near to proximity guests on adjacent seats *[1]*	+5 *[2]*
☯️ Near not next to proximity guests on adjacent seats *[1]*	-5 *[2]*
☹️ Not Next to proximity guests on adjacent seats *[1]*	-10 *[2]*
☠️ Not Near to proximity guests on adjacent seats *[1]*	-40 *[2]*
❤️ 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 table)	+2
☯️ Near not next to proximity guests on same table (or same section of an E-shaped table)	+4
☹️ 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 *[3]*	+2

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Near to proximity guests on adjacent tables *[3]*	+1
Near not next to proximity on adjacent tables *[3]*	+1
Not Next to proximity guests on adjacent tables *[3]*	-2
Not Near to proximity guests on adjacent tables *[3]*	-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 *[4]*
♥ Next to proximity male to right/left of female	+3 *[5]*
★ 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
Guests from different groups on adjacent seats to each other *[1]*	-30 *[6]*

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

[1] 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.

*[2] 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.*

[3] 2 tables are considered adjacent if their centres are within 5m/15ft of each other.

*[4] 0 if **alternate males and females** is unchecked in the **Preferences** window.*

*[5] Depending on the setting of **Prefer next to guests seated** in the **Preferences** window.*

*[6] 0 if **social distancing** is unchecked 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

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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.

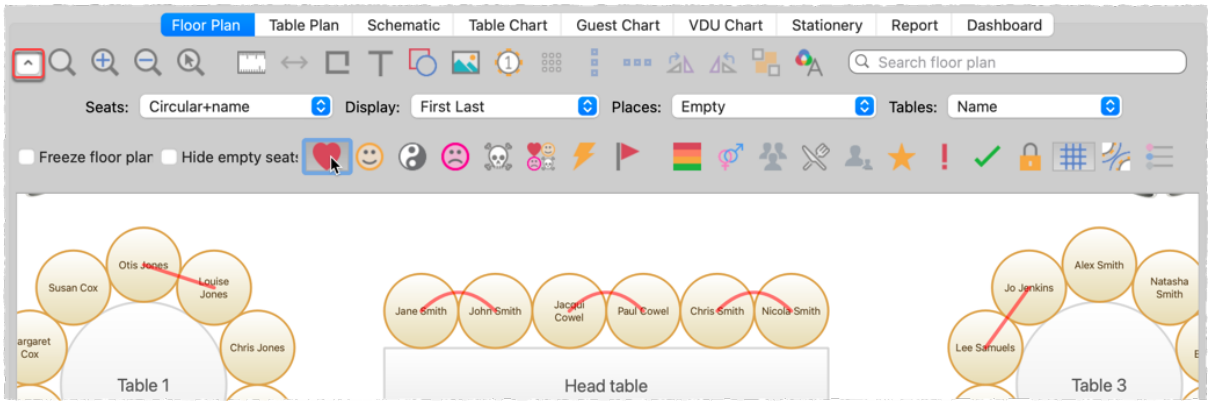
The longer the automatic assignment is run, generally the better it will be. Select **Edit>Preferences** and on the **Auto assignment** tab click on **seconds** and set an appropriate number of seconds (1 hour = 3600 seconds). Then select **File>Auto Assign Seats**.

Note The auto assignment will only run on 1 'core' of your computer CPU, so you should still be able to do other things while it is running.

Checking seat assignment by proximity

You can check how good your seat assignment by proximity is 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.

See also:

- Assign guests to seats (video with audio, 13:01 minutes)
- Improve the auto seat assignment

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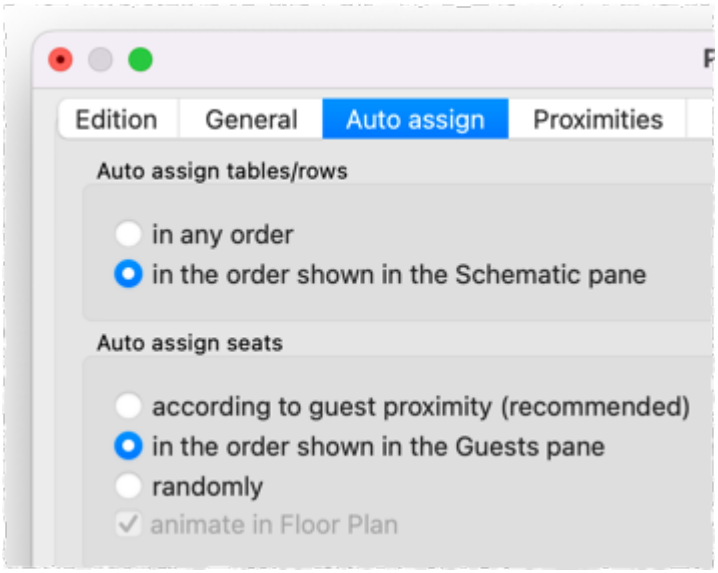
- Proximity

2.12.4 Automatic assignment by guest order

If you have set **Auto assign seats** to **in the order shown in the Guests pane** in the **Auto assign** tab of the **Preferences** window, then PerfectTablePlan will try to automatically assign guests to seats according to their current order in the **Guests** pane and the order of the tables. This can be useful for seating guests by precedence or rank at formal events.



For example:

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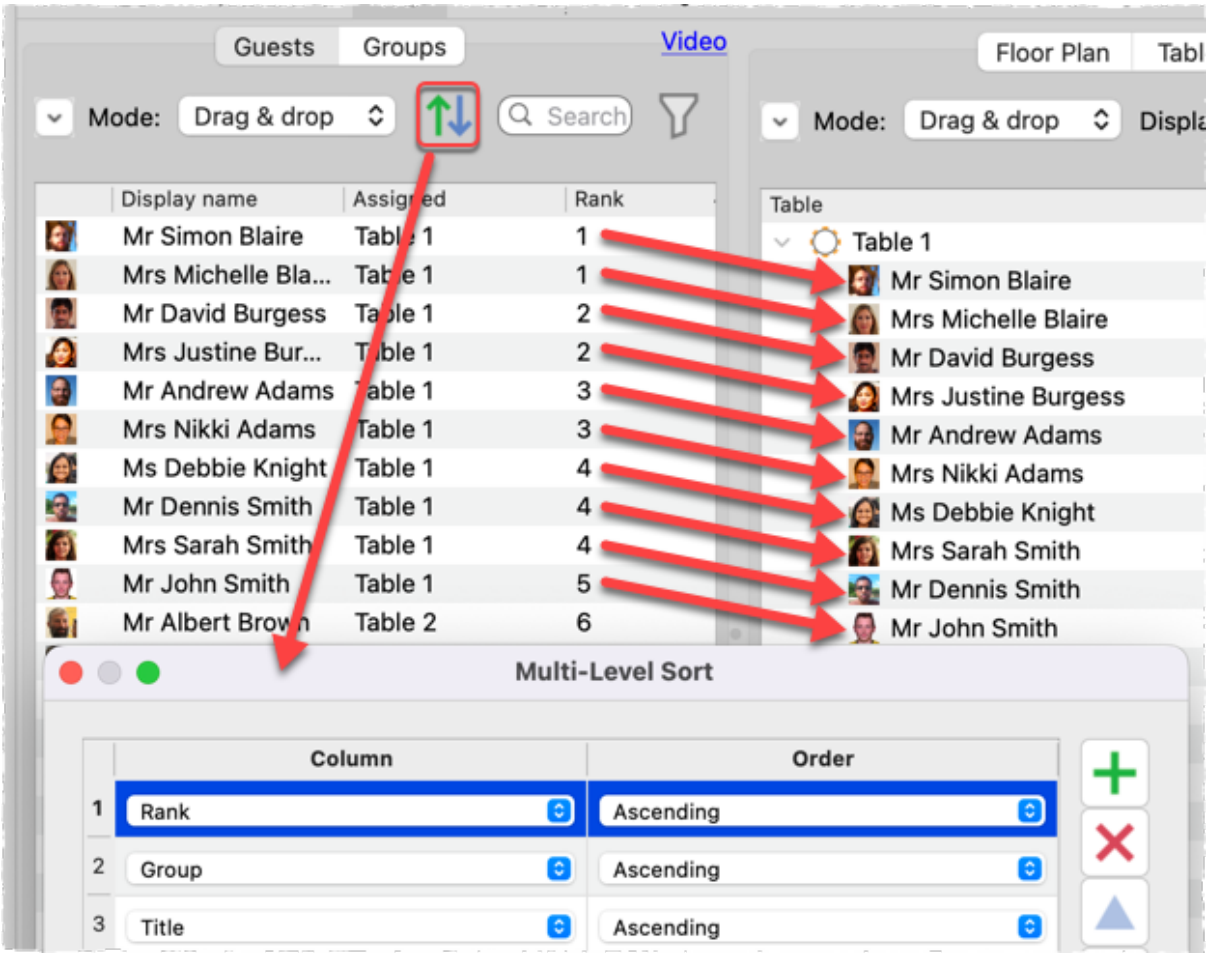

Guest assignment order

The guests are assigned in the order they are currently shown in the **Guests** pane, top to bottom.

To sort guests by a single column, click on the column header in the **Guests** pane.

To sort guests by multiple levels in the **Guests** pane, click on the ⇅ button at the top of the **Guests** pane to show the **Multi-Level Sort** window.

Generally text values are sorted alphabetically and numerical values are sorted numerically. But you can also arrange non-alphabetic sorting by guest title or suffix.

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Ordering by custom fields

You can use custom fields to store the precedence of each guest.

- Use a custom field of type **currency** if you wish to use a numeric scale. You can use decimal points. E.g. if a guest has a rank of '7.0' you could give their spouse a rank of '7.1'.
- Use a custom field of type **selection** if you have a limited number of classifications you want to rank by. You can colour-code these classes in the floor plan.
- Use a custom field of type **text** if to wish to store seniority. You should use a YYYY-MM-DD date format so that the dates are sorted in date order when sorted alphabetically. E.g. 2018-01-07 for 7th January 2018.

You can sort the **Guests** pane by multiple custom fields if there is more than one criteria. For example, you might want to sort by a numeric precedence value and then by seniority date.

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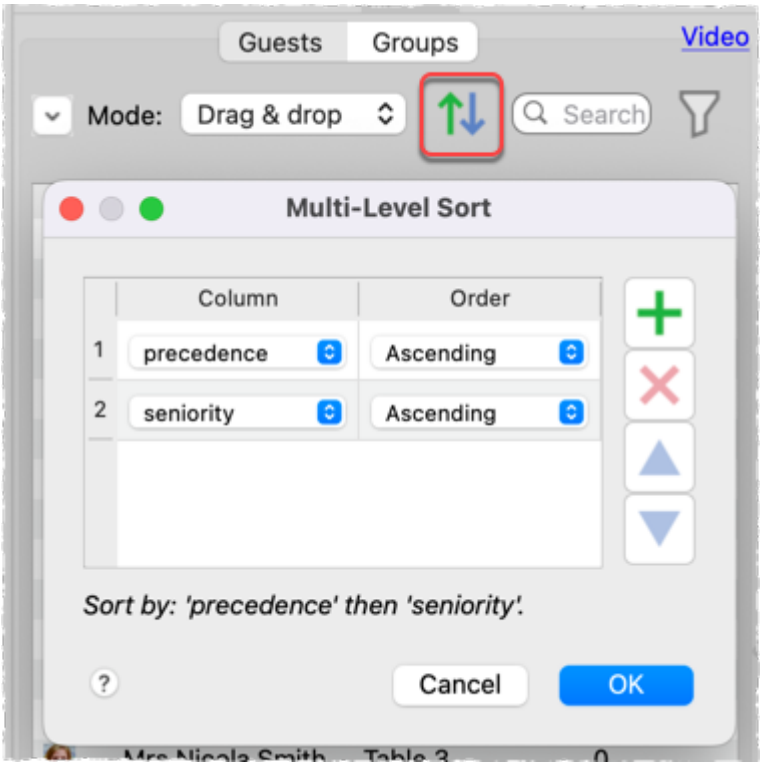

Table assignment order

The order in which guests are assigned to tables/row is set in the **Auto assign** tab of the **Preferences** window. Typically you will want to set **in the order shown in the Schematic pane** to fill tables in the order shown in the **Schematic** pane. You can change this order.

The order in which seats are filled depends on whether **Seat numbers** is set to clockwise or anti-clockwise for each table/row.

Other

You can run **File>Auto Assign Seats** as often as you like. However there is no random element and the result will always be the same for a given guest order, guest locking/RSVP properties and table order.

Note Guests who have been locked by you or have the wrong RSVP status (depending on the **Allow seat assignment with RSVP** settings in the **Preferences** window) will not be (re)assigned by automatic assignment.

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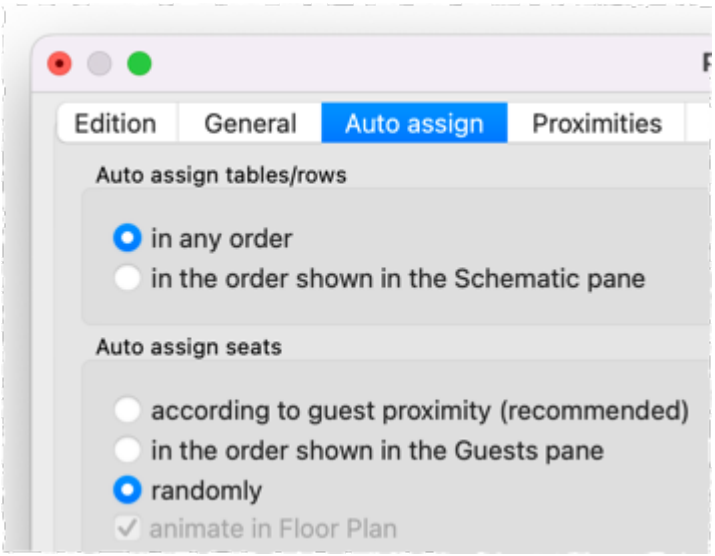
See also:

- Assign guests to seats (video with audio, 13:01 minutes)
- Assign seating by order of precedence

2.12.5 Automatically assign guests randomly

If you have set **Auto assign seats** to **randomly** in the **Auto assign** tab of the **Preferences** window, then PerfectTablePlan will try to automatically assign guests to seats at random. Guest proximity, group membership, VIP status and order in the **Guests** pane are ignored. This is useful in some type of events when you want to mix things up.



The order is which guests are assigned to tables/row is set in the **Auto assign** tab of the **Preferences** window:

- Set **in any order** to try filling the tables in different orders.
- Set in **the order shown in the Schematic pane** to fill tables in the order shown in the **Schematic** pane. You can change this order.

You can run **File>Auto Assign Seats** as often as you like. Each new run will create a new random layout.

Note Guests who have been locked by you or have the wrong RSVP status (depending on the **Allow seat assignment with RSVP** settings in the **Preferences** window) will not be (re)assigned by automatic assignment.

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See also:

- Assign guests to seats (video with audio, 13:01 minutes)

2.12.6 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.

When assigning guests by proximity, 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 though the possible assignments to find a good one in a reasonable time. PerfectTablePlan does this using a 'genetic algorithm'.

A genetic algorithm works by my 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 3x2x1. 10! is 10x9x8x7x6x5x4x3x2x1. This means that the difficulty of the problem rises very rapidly with the number of guests. For example:

```
25! = 15511210043330985984000000
```


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50! =
30414093201713378043612608166064768844377641568960512000000000
000

100! =
93326215443944152681699238856266700490715968264381621468592963
89
52175999932299156089414639761565182862536979208272237582511852
109168640
000000000000000000000000

200! =
78865786736479050355236321393218506229513597768717326329474253
32
44359449963403342920304284011984623904177212138919638830257642
790242637
10506192662495282993111346285727076331723739698894392244562145
166424025
40332918641312274282948532775242424075739032403212574055795686
602260319
04170324062351700858796178922222789623703897374720000000000000
000000000
000000000000000000000000000

500! =
12201368259911100687012387854230469262535743428031928421924135
88
38584537315388199760549644750220328186301361647714820358416337
872207817
72004807852051593292854779075719393306037729608590862704291745
478824249
12726344305670173270769461062802310452644218878789465754777149
863494367
78103764427403382736539747138647787849543848959553753799042324
106127132
69843277457155463099772027810145610811883737095310163563244329
870295638
96628911658974769572087926928871281780070265174507768410719624
390394322
53642260523494585012991857150124870696156814162535905669342381
300885624
92468915641267756544818865065938479517753608940057452389403357
984763639
44905313062323749066445048824665075946735862074637925184200459
369692981
02226397195259719094521782333175693458150855233282076282002340
262690789

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```
8342451712006207714640979456116127629145951237229913340169552363
638509428
8559201872743379517301458635757082835578015873543276888868012039
399882384
7021514676054454076635359841744304801289383138968816394874696588
1750450
6926365338175055478128640000000000000000000000000000000000000000
000000000
0000000000000000000000000000000000000000000000000000000000000000
000000000
000000
```

```
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

2.13 Copying to the clipboard

2.13.1 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 **Right** 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.

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.

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You can also use **File>Export** to transfer data to other applications via a file.

See also:

- Exporting

2.14 Printing

2.14.1 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 **Right** 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

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2.14.2 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:

- Merge guest names into stationery
- Ordering place cards
- **Stationery** pane
- Print stationery tutorial
- Show one stationery item per couple/family/group

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- Change the order of guests in a group

2.15 Emailing

2.15.1 Emailing

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

2.16 Exporting

2.16.1 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 Excel/CSV/delimited 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 database or other application you would typically export a 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

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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

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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

2.16.2 Export formats

PerfectTablePlan exports information in 8 major formats:

- **Excel** - Microsoft Excel's proprietary format.

- **CSV** (Comma Separated Value) - A text file readable by many applications including Microsoft Excel and Numbers. Columns and rows are delimited

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(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. 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

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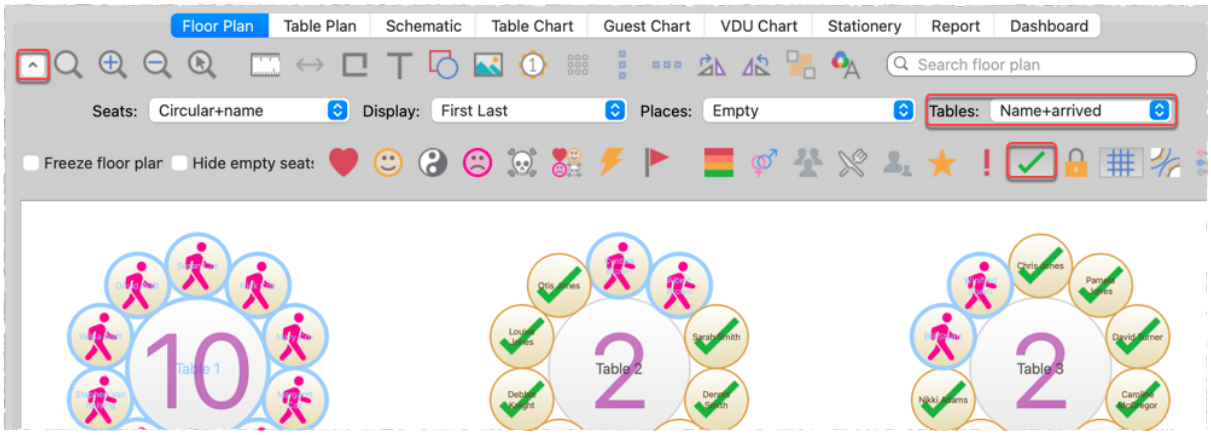
2.17 Checking-in guests

2.17.1 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**.

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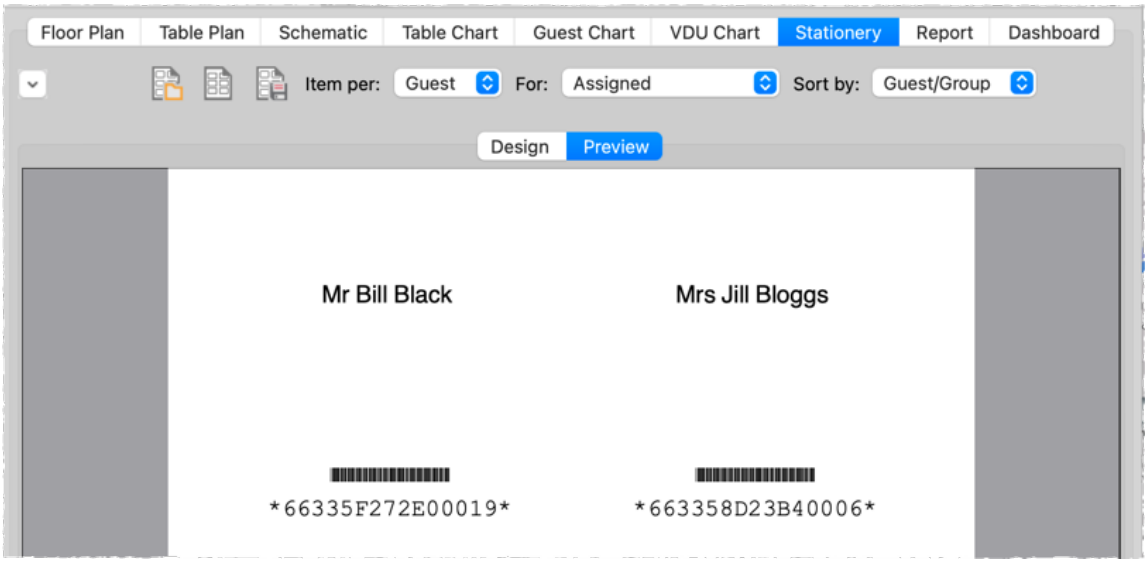

You can check in guests by printing a barcode of their unique guest ID on their invitation, ticket or badge and then scanning this barcode into PerfectTablePlan as they arrive. This is much faster and less error prone than trying to find and update guest records by typing into PerfectTablePlan. You will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

2.18 IDs

2.18.1 IDs

Items, such as guests, groups and tables, have associated Ids. The ID is a globally unique identifier for that item.

PerfectTablePlan creates 15 character hexadecimal codes. But any unique string of characters is permitted.

The ID is automatically assigned when an item is created and will not change. E.g. it will be the same value when exported/saved as it was when first created/imported/read in.

You cannot edit an ID through the PerfectTablePlan user interface.

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You can check for duplicate guest Ids using the Troubleshooting report.

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- If you create a guest 'Mr John Smith' in plan `myplan1.tp` and then **File>Save As...** the plan to `myplan2.tp`, then the guest will have the same ID in both plan files, even if you subsequently change their name in either plan. Which means you can run Multi-plan reports by ID.
- If you create a guest 'Mr John Smith' in plan `myplan1.tp` then **File>New** and create another 'Mr John Smith' in plan `myplan2.tp`., then the guest will not have the same ID in both plan files. So you will have to run Multi-plan reports by name.

Running Multi-plan reports by ID is preferred, because running Multi-plan reports by name causes issues if:

- The Title, First name or Last name is altered in any of the plans.
- 2 people in a plan have the same Title+First name+Last name (case insensitive).

Professional edition only

You can import and export guest Ids. This is useful for integrating PerfectTablePlan with other systems, such as event registration and CRM systems.

Guest Ids are also very useful for:

- merge imports
- importing proximity data
- guest barcodes

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2.19 Backup files

2.19.1 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 by default in a 'backup' folder in your plans folder. You can change the backup folder in the **Preferences** window.

Backup files 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

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2. select **Table planner backup Table planner backup** in the **Enable** drop-down.

3. navigate to the folder containing the backup files, usually `Documents\PerfectTablePlan\backups .`

4. 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.

See also:

- Find a missing plan file

2.20 Creating a good table plan

2.20.1 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.

2.21 Multiple user/computer access

2.21.1 Multiple user/computer access

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

File locking is not available on Mac. If you have 2 or more users accessing the same plan then you need to be careful that they don't overwrite each other's changes.

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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.	Multiple users can access the same plan from different machines.	Requires access to a shared network drive. File locking is not supported on the Mac version of PerfectTablePlan. This means that users can unknowingly overwrite each other's changes.
Store your plan files in a DropBox, synchronised across all your machines. (Do not synchronise your `Applications` folder, this could cause all sort of problems)	Changes on one machine are automatically synched to all other machines. Conflicts (.e.g. two users making changes to the same file at the same time) are handled automatically. Easily manage sharing with other users on a plan by plan basis.	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

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	You can still access your plan even if you have no Internet access. DropBox keeps a 1 month history of changes and allows edits and deletions to be undone. Works across Windows and Mac.	same time you will end up with 2 versions of the plan. An encrypted copy of your data is transmitted to and stored on the DropBox server. This may not be appropriate for highly confidential plans. DropBox requires a payment if you want to store more than 2GB of file.

Note You can store PerfectTablePlan and its preferences on a USB key as a portable application, along with your plans. This makes it easy to move between computers.

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
- Using on a USB drive

2.22 Using on a USB drive

2.22.1 Using on a USB drive

You can store your preferences in a .ini file in the same folder as your PerfectTablePlan .app. This allows you to store your preferences, along with your plans, on a portable device (e.g. a USB drive/memory stick). It is even portable between Windows and Mac computers.

To use PerfectTablePlan portably:

- Install PerfectTablePlan into an appropriate folder on the portable device, to which you have write permission.
- Start PerfectTablePlan.

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- Open the **Preferences** window.
- In the **General** tab select **a portable .ini file** for the **Store these preferences in** field.
- Click **OK**.
- Save your plans to the portable device.

If you are storing your preferences in a perfecttableplan.ini file, then recent files are stored with paths relative to the current executable. This means they should still work for plans stored on the device even after you have moved the device to another computer.

It is possible to have Windows and Mac versions of Hyper Plan on the same device sharing a single perfecttableplan.ini file and common plan files. Just make sure you install the Windows .exe and Mac .app into the same folder. We also recommend that they are the same version of PerfectTablePlan.

Note If you install PerfectTablePlan Mac .apps into 2 different folders and set them to use .ini files, they will each store their preferences in their own .ini file.

On Mac, for reasons we don't understand, you might need to set your Mac **System Preferences>Security & Privacy>Allow apps downloaded from to Anywhere** the first time you run PerfectTablePlan from a portable drive. Otherwise you may get spurious messages about the application being "damaged".

2.23 Integrating with PerfectTablePlan

2.23.1 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.

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For example to start up importing the file export.csv using the predefined 'theknot.com' mapping :

```
/Applications/PerfectTablePlan.app/Contents/MacOS/PerfectTablePlan -import export.csv -import_type theknot
```

Please email sales@perfecttableplan.com if you are interested in us adding a mapping for your import file format.

Integrate via XML file

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

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

```
/Applications/PerfectTablePlan.app/Contents/MacOS/PerfectTablePlan myplan.tp
```

PerfectTablePlan 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.

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

See also:

- PerfectTablePlan integration partners

2.23.2 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`

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-import_type <import type>	A pre-defined import file type. PerfectTablePlan will look through the list of pre-defined types until it finds one that contains the string passed in. For example `-import_type evite` will match the pre-defined type "evite" (case is unimportant). This argument is ignored if `-import` is not specified.	`-import_type evite`

See also:

- Integrating PerfectTablePlan

2.23.3 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 v7.1.0 or later you should set the version to 19, e.g.:

```
<version value="19"/>
```

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<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

ID attribute

Many of the items have a unique ID attribute. 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.

<images>...</images>

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

<guest_images>...</guest_images>

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

<textures>...</textures>

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

<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:

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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
12	E-shaped
13	Serpentine
14	Half serpentine

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

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- 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.

<floorplan_walls>..</floorplan_walls>

This section contains details of the walls/lines added to the floor plan.

<floorplan_images>..</floorplan_images>

This section contains details of the images 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.

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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
5	Near not next 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.

2.24 Uninstalling

2.24.1 Uninstalling

To uninstall PerfectTablePlan drag the PerfectTablePlan application from `Applications` (or wherever you installed) to the waste bin.

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Note You may also wish to delete any table plan files from the `Documents\PerfectTablePlan` folder.

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How do I?

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 guest image to the stationery

Add a new stationery layout

Add a personalised map to the stationery

Add a special character not on my keyboard

Add a title or text into the floor plan

Add/remove a single seat to/from a table

Add walls to the floor plan

Add custom fields

Add or remove dots at the end of titles

Align tables

Align printing with my stationery

Arrange multiple seatings for an event

Assign guests to seats

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Assign seating by guest type/category

Assign seating by order of precedence

Assign table captains

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 colour

Change table size or shape

Change text inside panes

Change the order of guests in a group

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 social distancing

Check where a guest is seated across multiple seatings

Check who a guest was seated next to at previous events

Check-in guests

Close the current plan

Choose a format to export to

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Copy guests from one plan to another

Create address labels

Create a horseshoe shaped table

Create a non-rectangular room

Create a re-usable template plan

Create an E-shaped table

Create a rounded ended table

Create a serpentine table

Create rectangular tables with seats on 1,2 or 3 sides

Customize standard guest titles

Display seating on a VDU or plasma screen

Edit a property for multiple guests

Edit a property for multiple tables

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

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Handle guests with unknown names

Handle multiple rooms

Handle post-nominal titles

Handle sponsored tables

Hide empty seats

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 proximity data

Import seating data

Improve the auto seat assignment

Insert a new guest into an existing group

Joining and splitting columns

Keep groups together

Liaise with caterers

Load sample stationery

Lock guests to seats

Make all names have the same font size

Merge guest names into stationery

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Move guests from one group to another

Only assign guests who have accepted

Order guests by title or suffix

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

Rotate tables

Seat couples on the same table but not adjacent

Select multiple items

Set transparent as a colour

Show custom fields

Show gender

Show groups

Show meals

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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

Space seats correctly

Space tables correctly

Track details of non-seated guests

Turn off guest name capitalisation

Turn the floor plan grid on/off

Use and image of the venue

Use social distancing

Use particules in names

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 seatings, you might wish to have each person sit with different people at each seating. PerfectTablePlan can help you achieve this.

Professional edition only

Select **File>Auto Assign Multiple….** The **Auto Assign Multiple Seatings** window will appear. Set ***Number of seatings***, how you want the guest

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proximities to change after each seating and the multi-plan report you wish to display, then click **OK**. The seatings will then all be calculated in a single operation and the report shown.

Example 1

We are planning a 3 course charity dinner and want to mix up the couples so they sit with different people each course, but still stay in their couples.

1. Create a plan with all the guests and the floor plan.

2. Give all the couples 'Next to' proximity (you can do this during import).

3. Select **File>Auto Assign Multiple...** .

4. Set:

    a. **Number of seatings** to **3.**

    b. **set guests next to each other with proximity** to **Neutral or Not next to** and ☠**Not near to**.

    c. **set guests at same table/section with proximity** to **Neutral or Not next to** and ☹**Not next to**.

5. Click **OK**.

This will set the proximity of guests sat next to each other as 'Not near to' and on the same table as 'Not next to' for the next seating, but preserve the initial 'Next to' and 'Near to' proximities. This means the couples should be kept together for every seating.

Example 2

We are planning 5 consecutive business dinners with a mix of investors and founders. We want to sit investors next to different founders for each

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dinner. Each founder has also expressed a preference for 3 investors they would most like to sit next to at one of the dinners.

1. Create a plan with all the guests and the floor plan.
2. Create a custom field 'guest type' of type 'selection' with possible values 'founder' and 'investor'. Set the values for the guests appropriately (you can do this during import).
3. For each founder set proximity 'Next to' for the 3 investors they would most like to sit next to (you can do this during import).
4. Create a custom proximity to sit guests of type 'founder' 'Next to' guests of type 'investor'.
5. Select **File>Auto Assign Multiple...** .
6. Set:
   a. **Number of seatings** to 5**.**
   b. **set guests next to each other with proximity** to **Any** and ☠**Not near to**.
   c. **set guests at same table/section with proximity** to **Neutral or Not next to** and ☹**Not next to**.
7. Click **OK**.

This will set the proximity of guests sat next to each other as 'Not near to' for the next seating, regardless of their initial proximity. This means a founder should only be sat next to a preferred investor once.

If a guest is unable to attend a particular seating, you can open that plan, unassign them and set their RSVP to **Declined** after you have generated all the plans.

It is also possible to do it step-by-step, however it is a lot more work.

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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 ⌘ +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 Summary, Pairs, Matrix and Guest seating **Multi-plan** reports in the Σ Report pane.

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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**.

See also:

- Check where a guest is seated across multiple seatings
- Check who a guest was seat next to at previous events

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:

- Assign guests to seats (video with audio, 13:01 minutes)
- Improve the auto seat assignment
- Assign seats by guest type/category
- Assign seating by order of precedence
- Only assign guests who have accepted
- Arrange multiple seating for an event
- Creating a good table plan

3.2.3 Assign seating by guest type/category

Professional edition only

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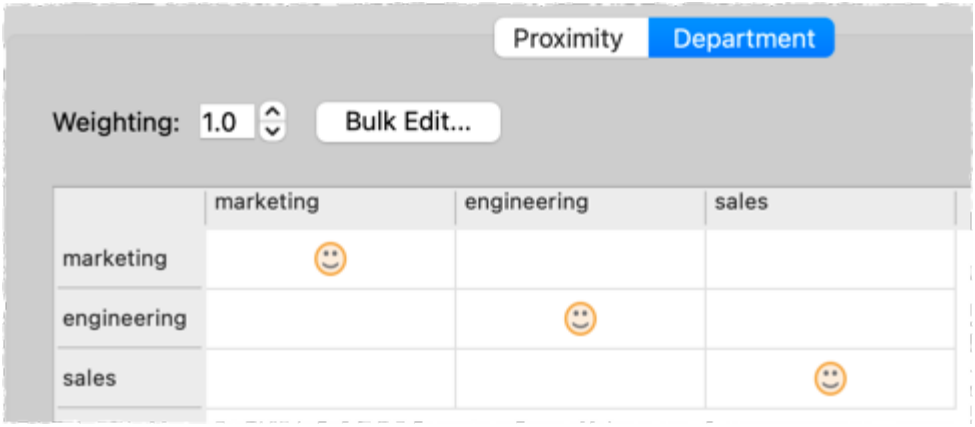
You can use custom fields to control the how the automatic seat assignment by proximity places different categories of guests. E.g. whether it should place guests from different departments or geographical areas together or apart. You can use **Weighting** to set different levels of importance to different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

Note If you set the **Weighting** to 1.0, this means that it is as important as individual proximity and couples, families and groups might be separated to satisfy the custom proximity. So you might want to set it to, say, 0.3 (30% as important).



See the **Custom field proximity** pane for more details.

See also:

- Custom proximity (video with audio, 1:04 minutes)
- Assign guests to seats (video with audio, 13:01 minutes)
- Show custom fields

3.2.4 Assign seating by order of precedence

'Order of precedence' seating is where guests are sat according to their precedence, rank, name of their organization or some other criteria. It is often used at more formal events, such as military and diplomatic events.

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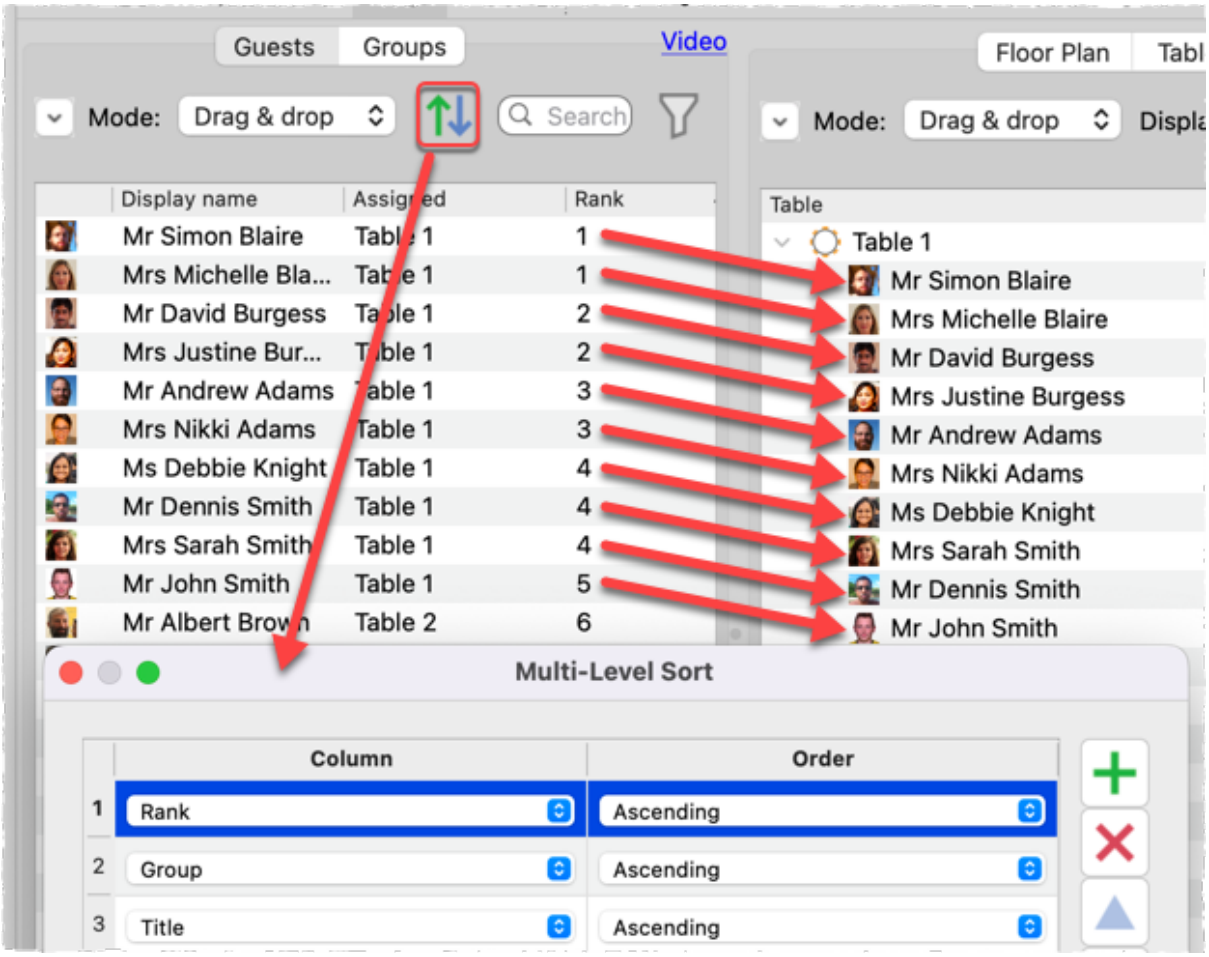
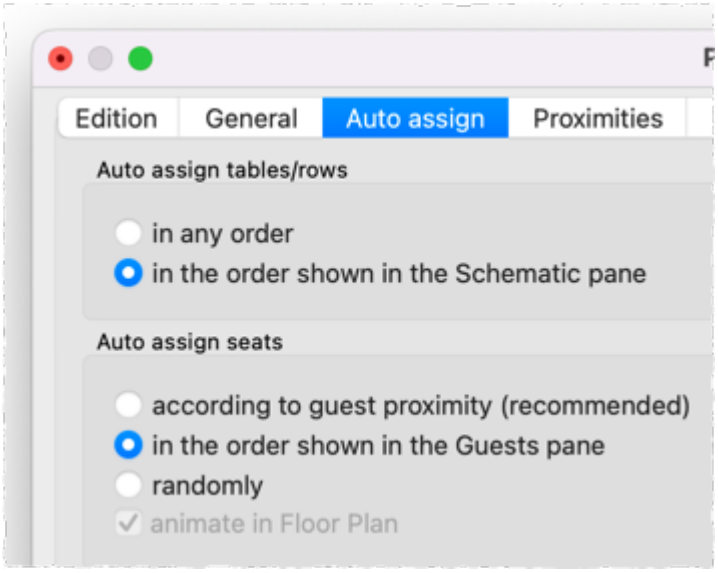


To seat by order of precedence, set the **Auto assign** tab of the [Preferences window] as shown below:



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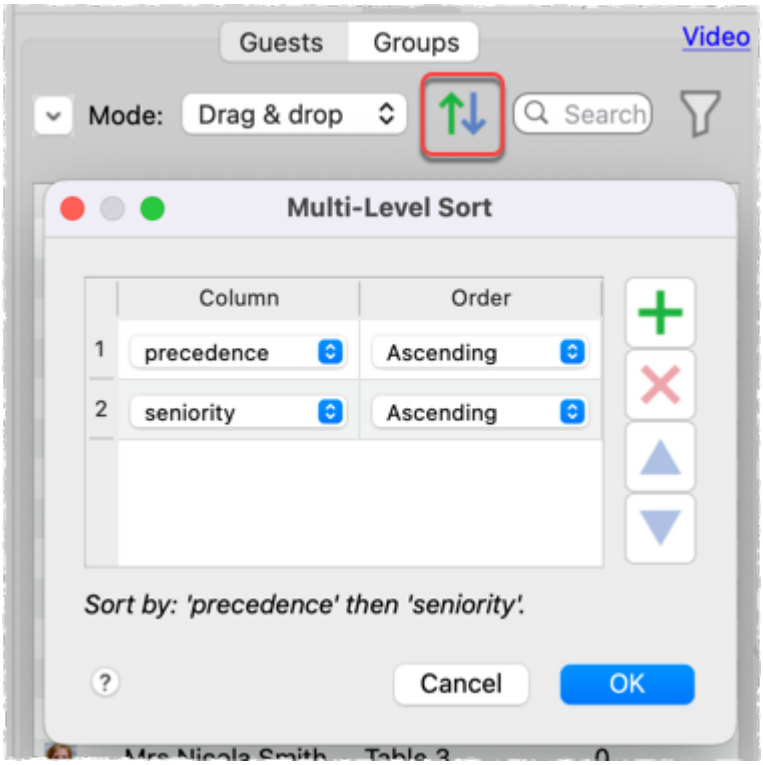
Click on the **Sort** button at the top of the **Guests** pane and order your guests in the order you want them to be assigned. You can set a special, non-alphabetic ordering by title or suffix.

See also:

- Assign guests to seats (video with audio, 13:01 minutes)

Advanced and Professional editions only

You can order by custom fields, such as precedence or seniority.



Lock any guests you don't want to (re)assigned.

Set the order of the tables/rows in the **Schematic** pane to the order you want them to be assigned.

The order in which seats are filled depends on whether **Seat numbers** is set to clockwise or anti-clockwise for each table/row.

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Select **File>Auto Assign Seats**.

See also:

- Automatic assignment by guest order

3.2.5 Assign table captains

Sometimes you want to assign 'table captains' to particular tables. For example, at business or charity events where these people have sponsored tables.

If you want to assign particular table captains to particular tables, you can do that by:

- Manually dragging each table captain from the **Guests pane** to their seat in the **Floor Plan** pane.
- Locking them to the assigned seat.

It might help to set table captains to have VIP status.

Once you have all the table captains assigned and locked, you can fill in all the other guests around them using automatic seat assignment.

Professional edition only

If you want to space out table captains, one per table, but don't care which tables they sit on:

- Add table captain as a type of guest using a custom field.
- Set guests of type table captain to sit **Not near to** each other.

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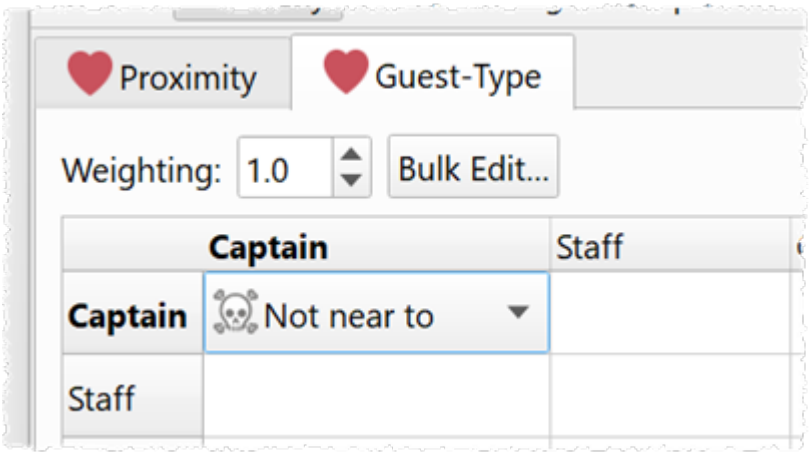

The automatic seat assignment will then try to space them out, one per table.

See also:

- Handle sponsored tables

3.2.6 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).

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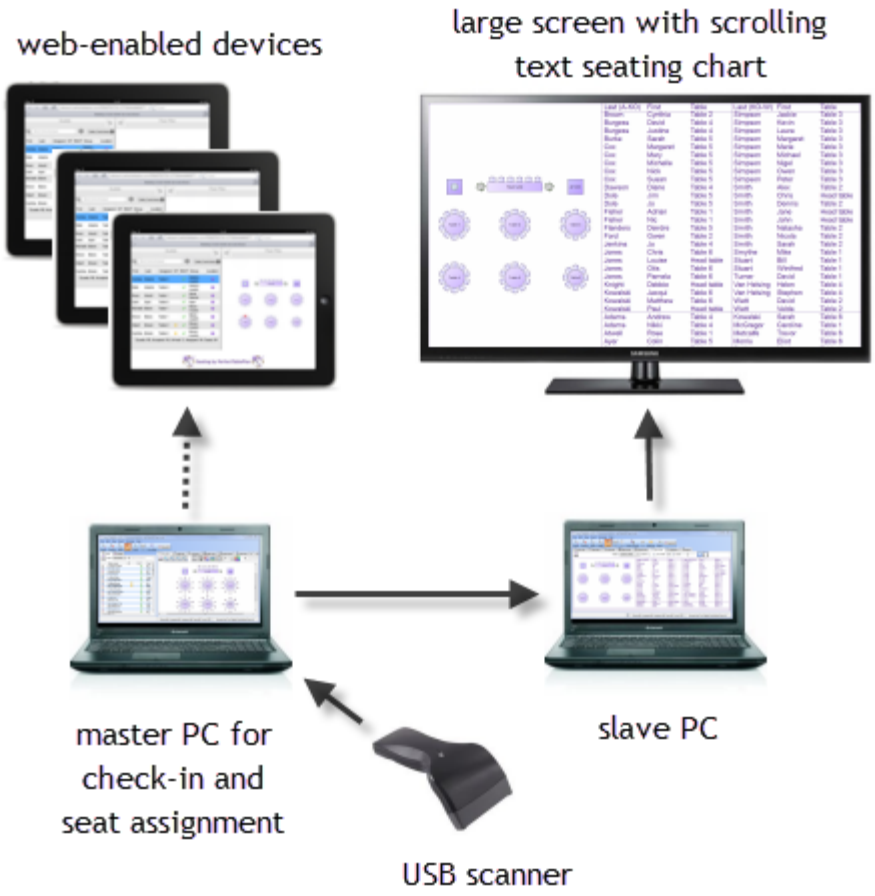

Example real time seat assignment setup

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).

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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.

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'.

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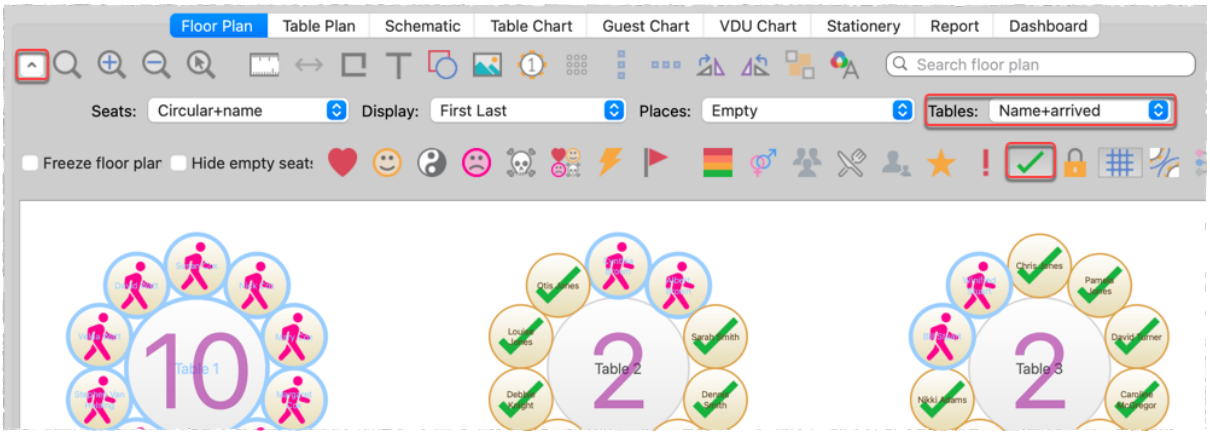

Displaying the seating on iPads or other web-enabled devices

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:

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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:

- Assign guests to seats (video with audio, 13:01 minutes)
- **VDU Chart** pane
- Display seating on a VDU or plasma screen
- Export to web, iPad and other devices
- Multi-user/computer access

3.2.7 Check where a guest is seated across multiple seatings

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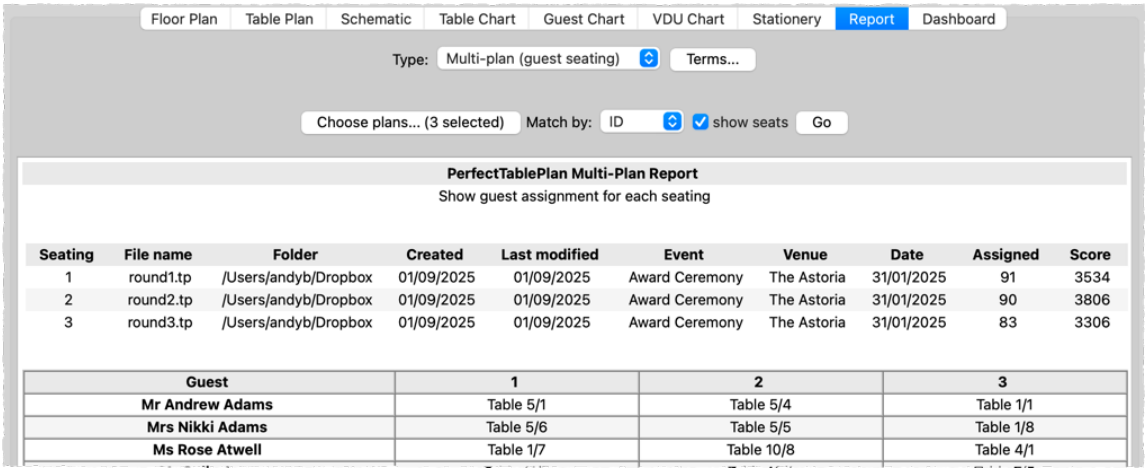
You can check which table a guest is seated on across multiple plans using the **Multi-plan (guest seating)** report in the Σ Report pane. You can **File>Print** or **File>Export** this report to give to people for networking events.



Seating	File name	Folder	Created	Last modified	Event	Venue	Date	Assigned	Score
1	round1.tp	/Users/andyb/Dropbox	01/09/2025	01/09/2025	Award Ceremony	The Astoria	31/01/2025	91	3534
2	round2.tp	/Users/andyb/Dropbox	01/09/2025	01/09/2025	Award Ceremony	The Astoria	31/01/2025	90	3806
3	round3.tp	/Users/andyb/Dropbox	01/09/2025	01/09/2025	Award Ceremony	The Astoria	31/01/2025	83	3306

Guest	1	2	3
Mr Andrew Adams	Table 5/1	Table 5/4	Table 1/1
Mrs Nikki Adams	Table 5/6	Table 5/5	Table 1/8
Ms Rose Atwell	Table 1/7	Table 10/8	Table 4/1

See also:

- Check who a guest was seat next to at previous events

3.2.8 Check who a guest was seated next to at previous events

Advanced and Professional editions only

Multi-plan report

You can use the summary, pairs and matrix **Multi-plan** reports to see who a guest was sat next to (or on the same tables as) across multiple events.

See also:

- Arrange multiple seatings for an event

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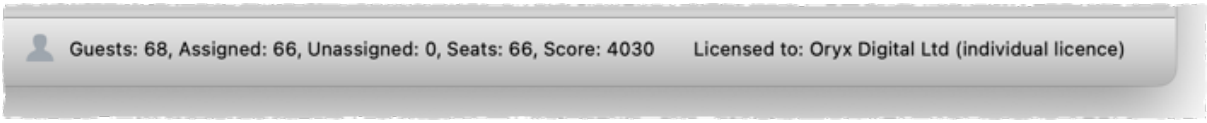
- Check where a guest is seated across multiple seatings

3.2.9 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. If you don't like the results you can **Edit>Undo** them.

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 50 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
- whether to sit female partners to the left or right of their male partners

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.

You can colour code guests according to their seating score. Happy guests (e.g. those sat next to guests with 'next to proximity') are shown in green. Unhappy guests are shown in red.

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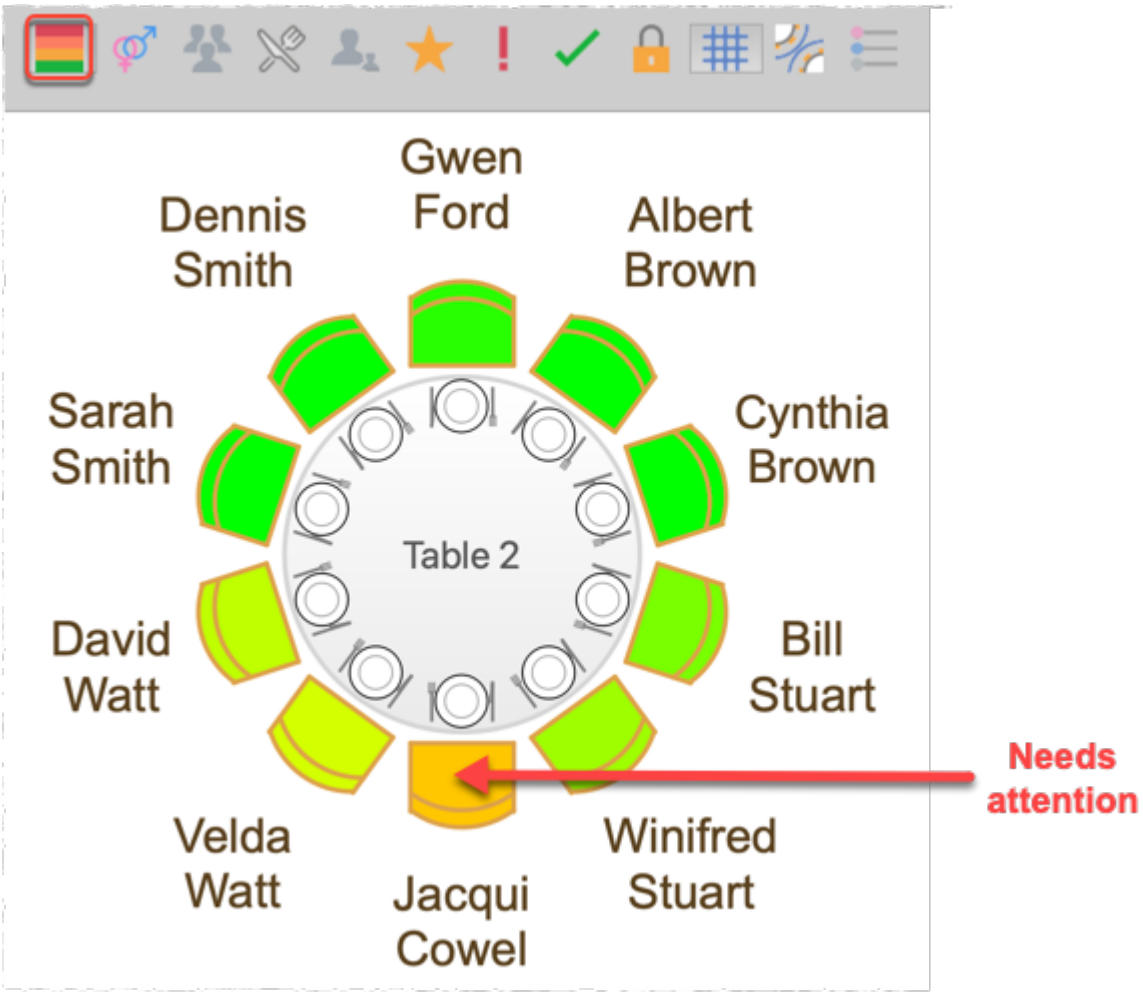

No matter how long you run it for, PerfectTablePlan can't guarantee to find the mathematically optimal (highest scoring) solution. This is because the number of combinations for even a small table plan is mind-bogglingly large. However PerfectTablePlan will usually get quite close, fairly quickly. Also 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.

You can also select a seat and choose **Edit>Guest Suggestions** to get a ranked list of guests to place in this seat. The difference that assigning this guest will make to the overall seating score is shown in brackets. Select a guest if you want to place them in the seat (swapping them with any existing guest).

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See also:

- Assign guests to seats (video with audio, 13:01 minutes)
- Automatic seat assignment
- Keep groups together
- Only assign guests who have accepted
- Assign seating by guest type/category
- Assign multiple seatings for an event

3.2.10 Keep groups together

Sometimes you want to keep groups together and sometimes you want to split them up.

To keep a group together when manually dragging them to a seat either:

- hold down the *Shift* key and then drag any guest in the group; or
- drag the group icon from the **Groups** pane

To keep a group together during automatic seat assignment, make the guests in the group have **Next to** proximity to each other. Also, each guest can sit next to a maximum of 2 people, so don't over-specify the seating with too many **Next to** proximities per guest.

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Even with proximities correctly set, the automatic seat assignment will sometimes split up groups. This might be because it is trying to balance lots of different factors (such as alternating gender, minimizing empty seats and custom proximity) not just guest proximity. But it may also be because combinatorial problems, such as seating, are really hard, even for a computer! Often you can improve the automatic seat assignment by running it again. Maybe set it to keep running while you have a long lunch.

Once a group is assigned to seats you can lock them, to prevent them being accidentally moved.

See also:

- Assign guests to seats (video with audio, 13:01 minutes)
- Improve the auto seat assignment

3.2.11 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 ⌘*K*/⇧⌘*K*.

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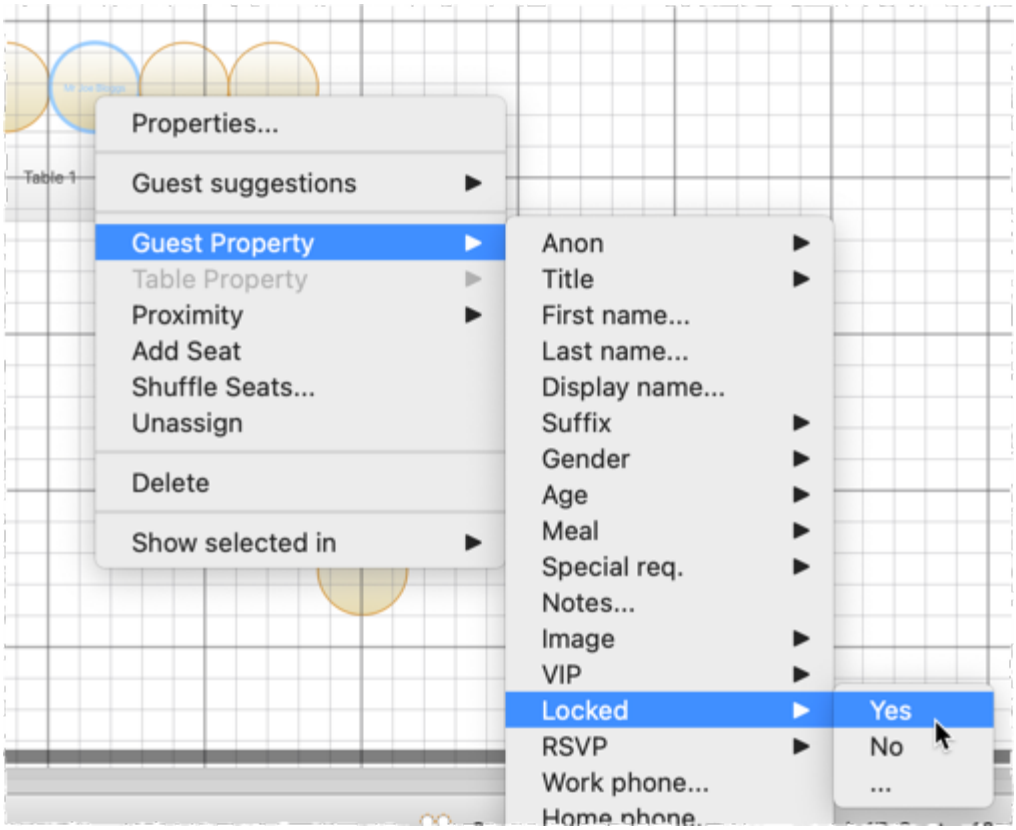

You can also lock all the guests in a group or at a table by right-clicking on the group/table and selecting **Guest Property>Locked>Yes** from the pop-up menu.

See also:

- Assign guests to seats (video with audio, 13:01 minutes)

3.2.12 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**.

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5. If you have unassigned guests select **File>Auto Assign Seats**. Only guests who have accepted will be assigned to seats.

See also:

- Assign guests to seats (video with audio, 13:01 minutes)
- RSVP status

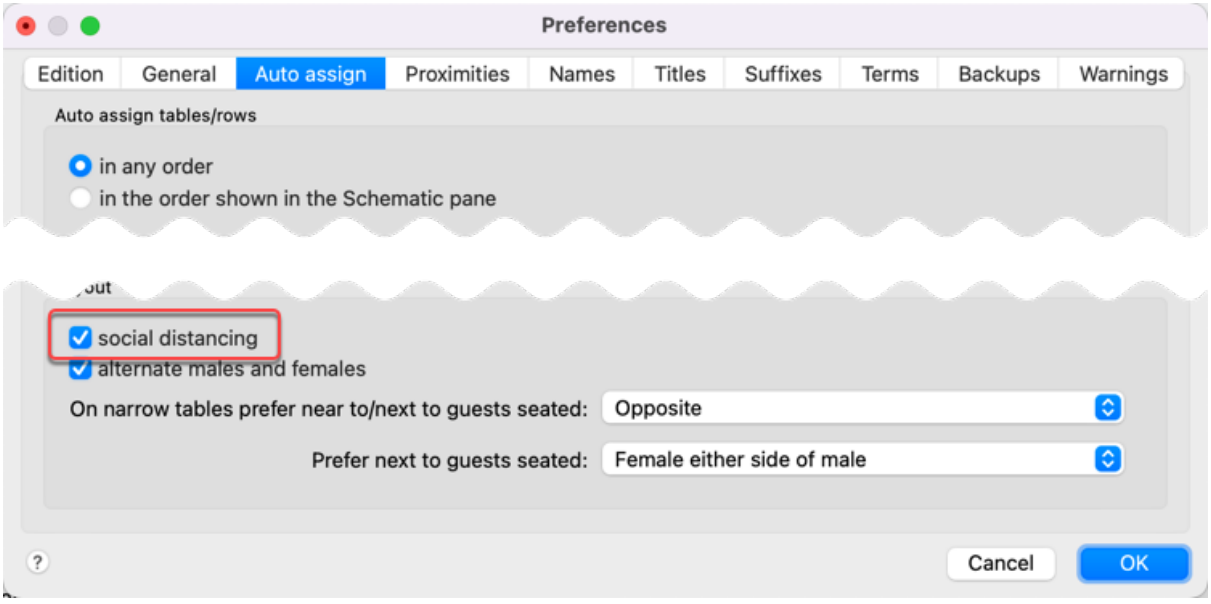
3.2.13 Seat couples on the same table but not adjacent

If you want to automatically assign couples to sit on the same table, but not on adjacent seats, you should set them to have **Near not next to** proximity.

You can set this to be the default for couples in Preferences.

3.2.14 Use social distancing

The PerfectTablePlan automatic seating algorithm will usually try to minimize the number of empty seats between guests. If you want it to socially distance guests (by putting empty seats between different groups) you can check **social distancing** in the **Auto assign** tab of the **Preferences** window.



For social distancing to work you need to have more seats than guests. Ideally, at least one extra seat per group.

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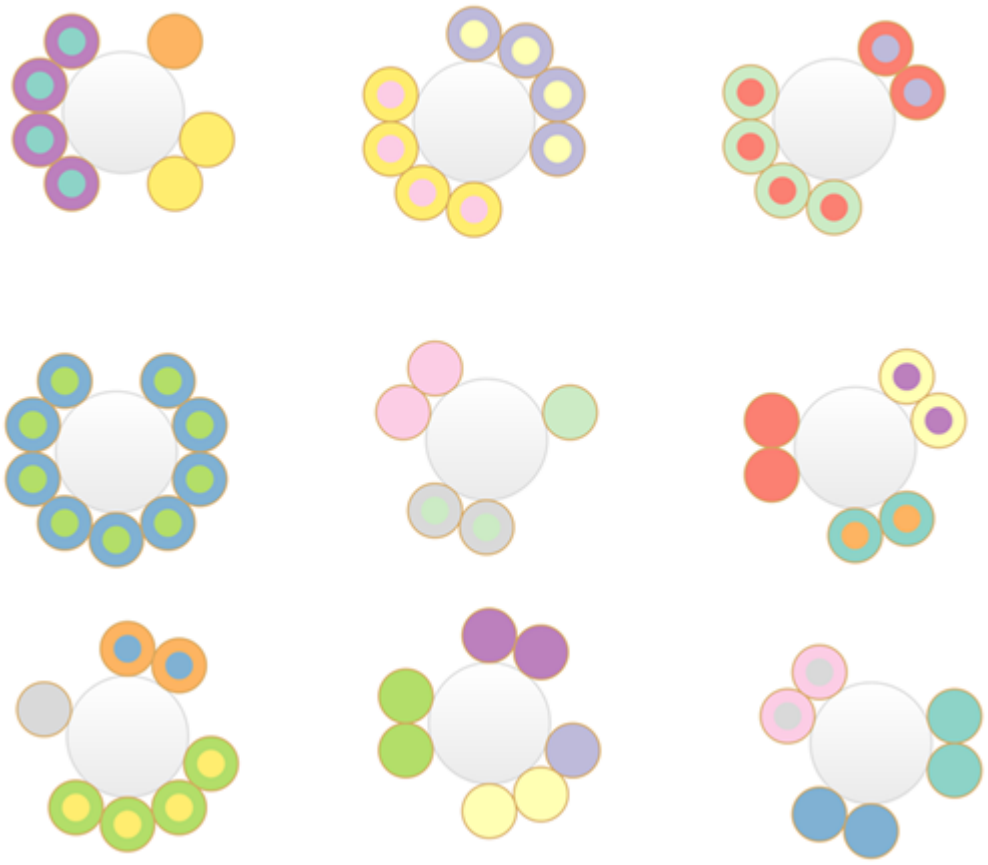
Socially distanced seating



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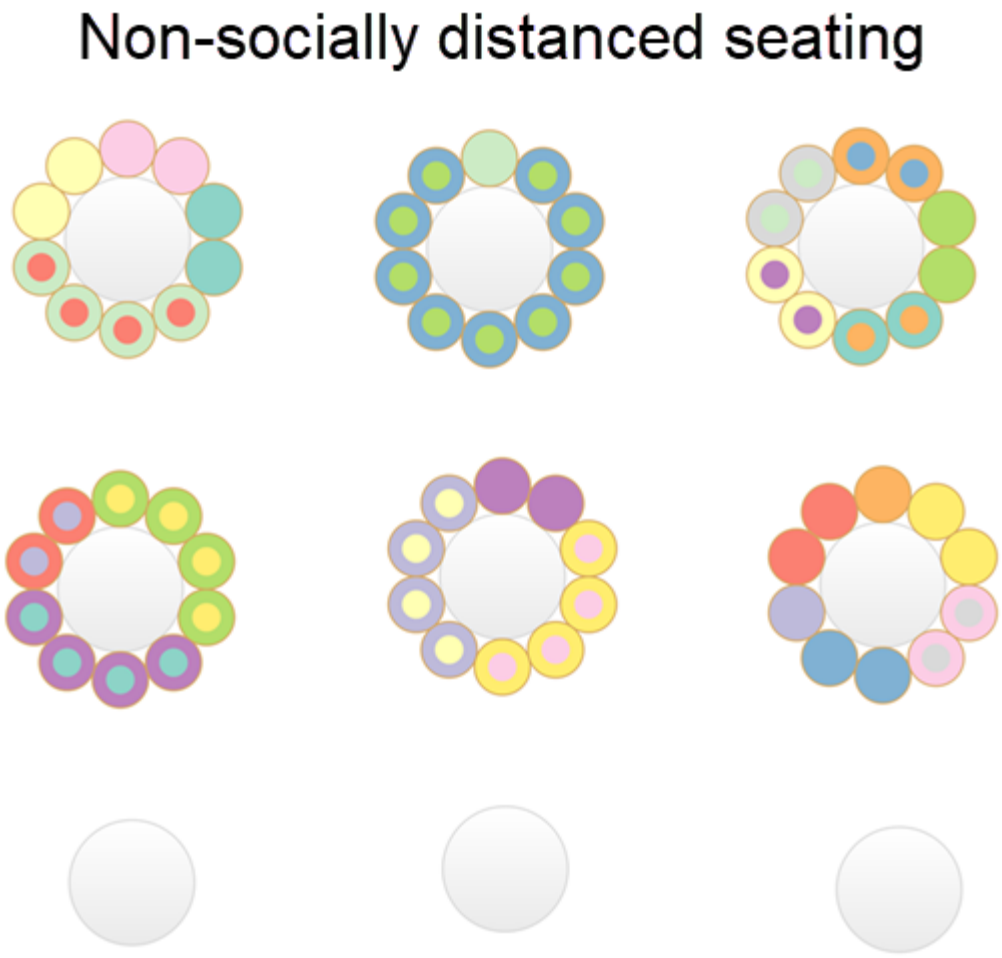

See also:

- Check social distancing

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.

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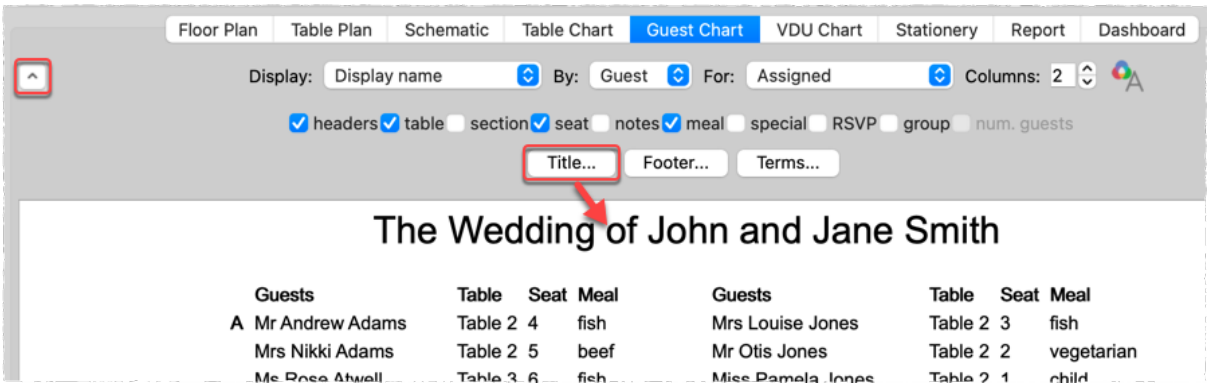
4. Click **OK.**



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 choose Excel.
- To import into Numbers, 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.

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2. Select **Edit>Copy** from the menu bar (not ⌘+*C*, this only copies selected text).

3. Start Excel/Word.

4. Select **Edit>Paste** in Excel/Word.

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 Excel/CSV/delimited text 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**.

4. Edit the **Export file** field or click on the **Choose...** button to set the output file.

5. Click **OK**.

Excel can also read CSV format files.

See also:

- Export a chart/report to Excel/Word

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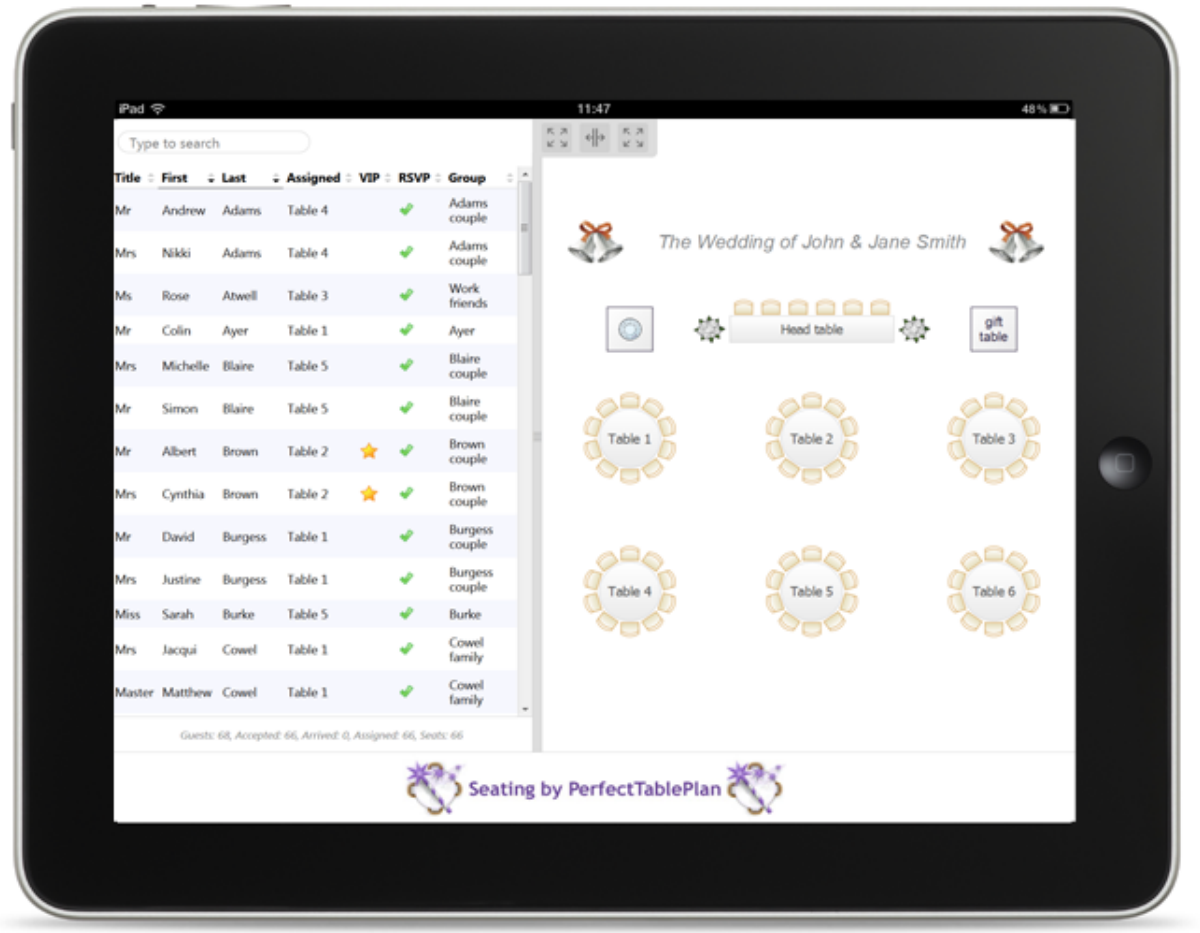
3.4.4 Export to web, iPad, Android and other devices



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.

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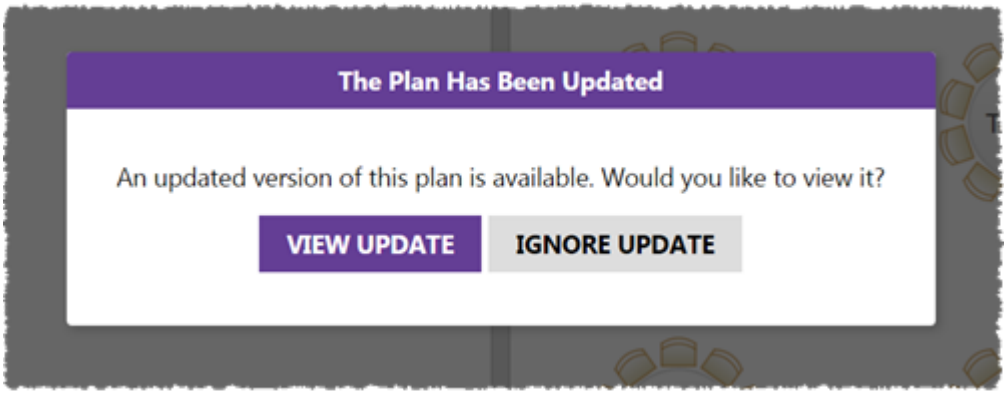
Hovering over a guest in the left pane shows where they are seated in the right pane. You can also search guests and groups.

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 do not guarantee 100% availability.

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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.

See also:

- Export to web or tablet (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 Mac

The ability to print straight to a PDF document is built into Mac, you don't need to install any additional software.

1. Select **File>Print**, the PerfectTablePlan **Print** window will appear.
2. Click the **Setup...** button, the Mac Print window will appear.
3. Drag the PDF button down to **Save as PDF....**
4. Choose a location for the file in the **Save** window and click **Save**, the **Print Setup** window will appear.

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5. Choose the print setup and click **OK.**

6. Click **OK** on the PerfectTablePlan **Print** window.

A PDF format document should now have been created.

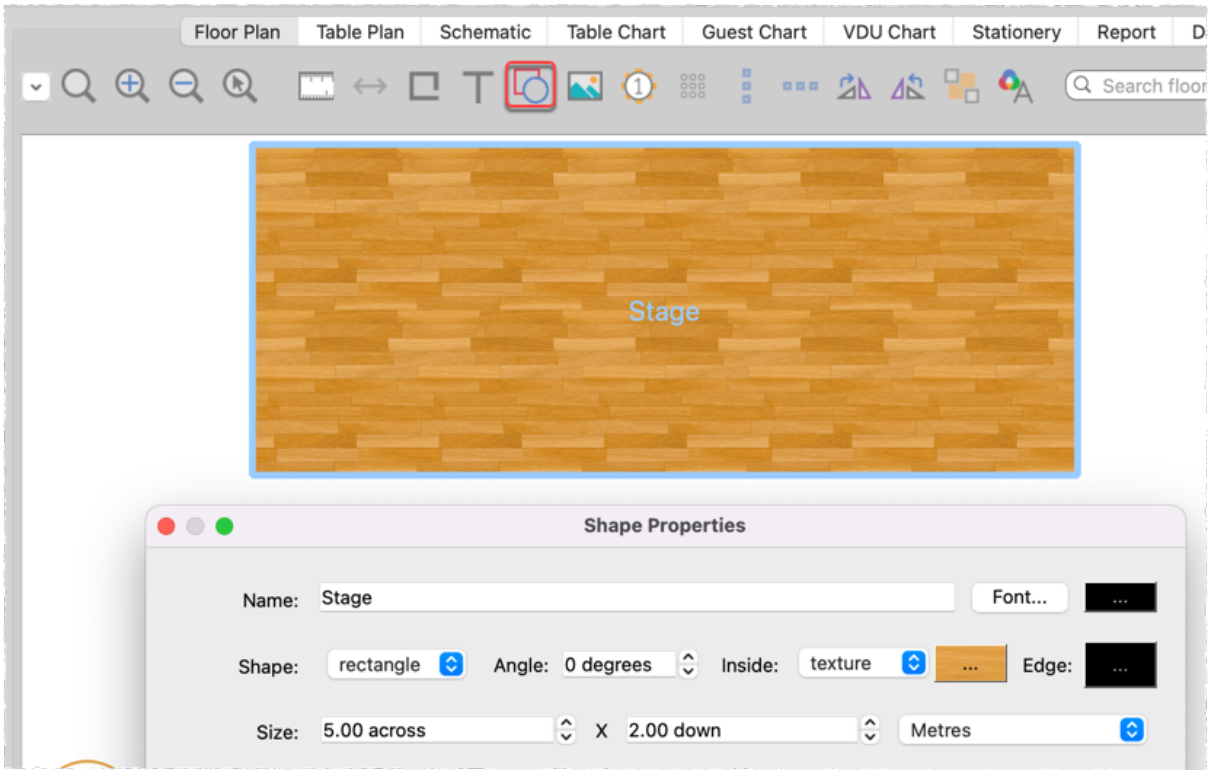
Checking the output

You can check that the PDF output is acceptable using the free Adobe Acrobat reader. Many web browsers can also read PDF files.

3.5 Floor plan

3.5.1 Add a dance floor, stage etc to the floor plan

You can use rectangular, square, elliptical or circular shapes to represent floor plan features such as dance floors and stages. Click on the **Shape** button at the top of the **Floor Plan** pane to add a shape to the floor plan.



See also:

- Create a floor plan (video with audio, 10:27 minutes)

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- Add a graphic/image/clipart to the floor plan
- Add walls 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 either:

1. Drag the image from Mac Finder or a web browser onto the **Floor plan** pane.
2. Double-click on the image to change its size, rotation etc.

Or:

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 **Choose...** 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.

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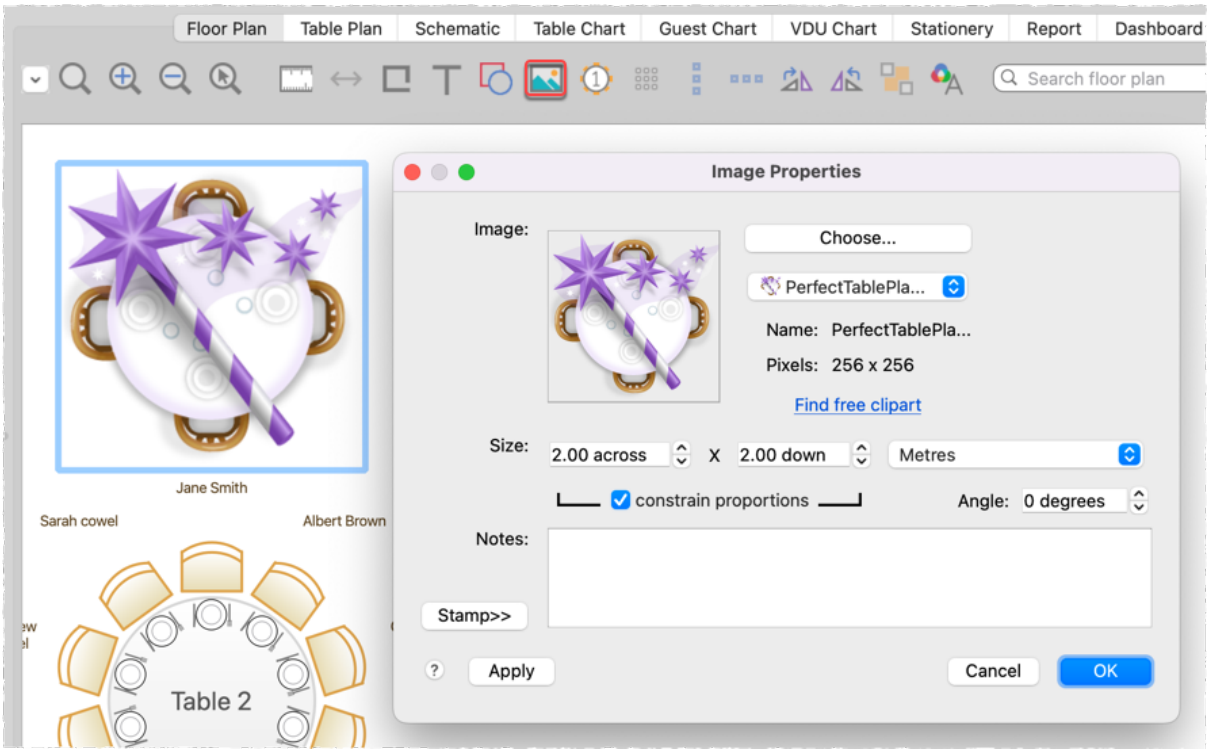

See also:

- Floor plan images (video with audio, 1:11 minutes)
- Create a floor plan (video with audio, 10:27 minutes)
- 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 **Insert text** button at the top of the **Floor Plan** pane. The **Insert Text** window will appear.

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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.

See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Add a dance floor, stage etc to the floor plan
- Add a graphic/image/clipart to the floor plan

3.5.4 Add walls to the floor plan

Click on the **Insert Line** button to draw a wall. Click on each corner in turn and double-click to finish. Press the *Escape* key to cancel. You may find it easier to place the lines with grid snap on. You may also need to zoom in.

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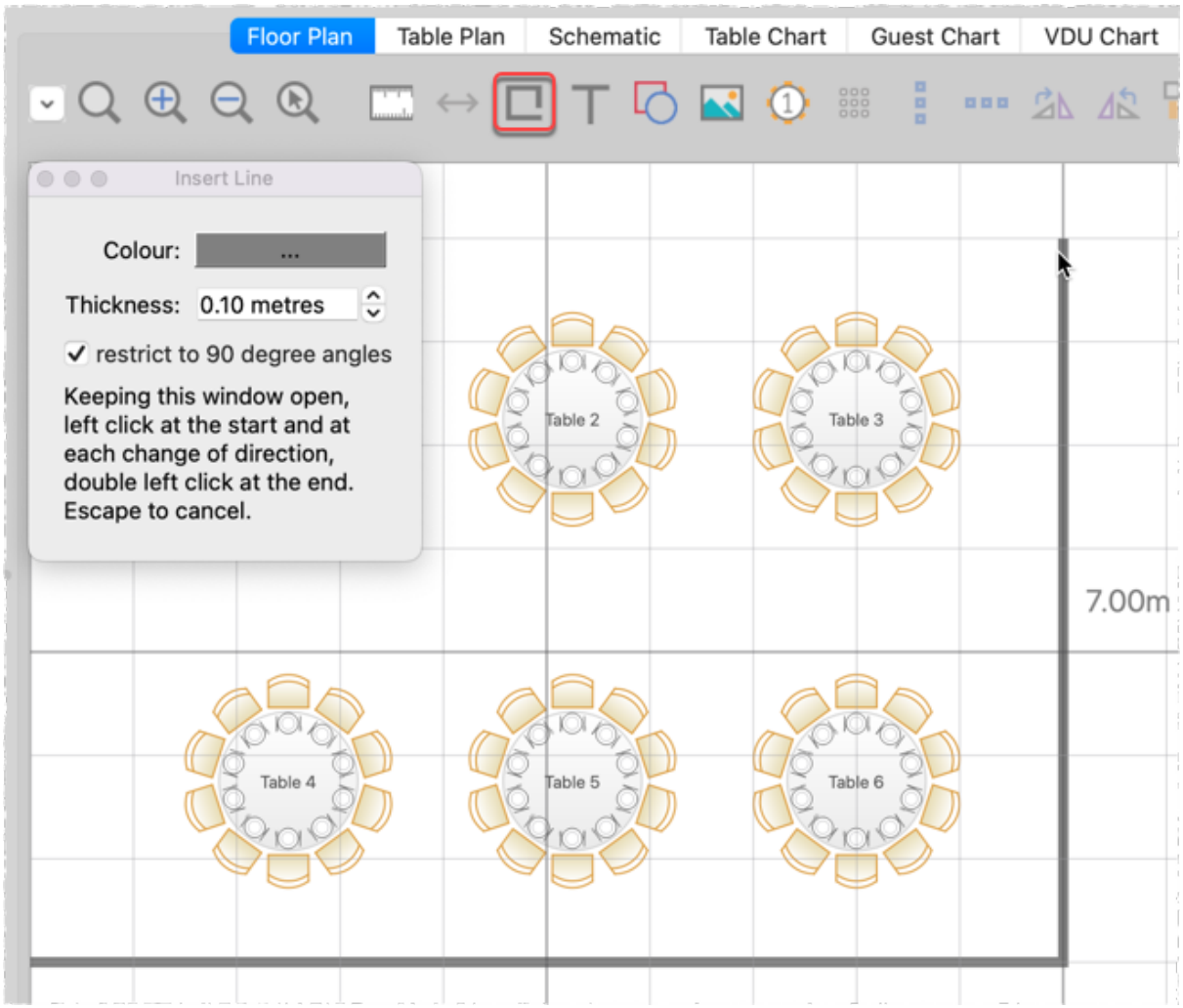

See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Add a dance floor, stage etc to the floor plan

3.5.5 Align items

You can easily align the centres of tables and other items to a grid by turning on grid snap.

You can also align selected items into a vertical or horizontal line using the **Align vertical** and **Align horizontal** buttons in the **Floor plan** pane.

You can move selected items using the mouse or keyboard arrow keys. If you press an arrow key when grid snap is on, the item will be moved one grid

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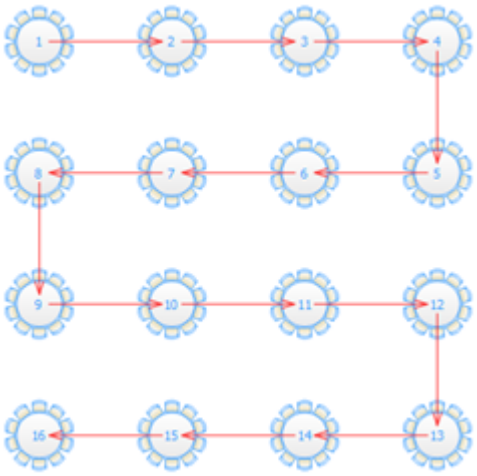
position. If you press an arrow key when grid snap is not on, the item will be moved 5 cm/2 inches (1 cm/0.4 inch if the ⇧ key is held down).

If you depress the # button at the top of the **Floor plan** pane, guides lines will be drawn when you move a single floor plan item.

Professional edition only

You can use the **Table Layout** window to quickly lay out tables in a wide range of configurations.



See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Space tables correctly
- Select multiple items

3.5.6 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 left of the pane.

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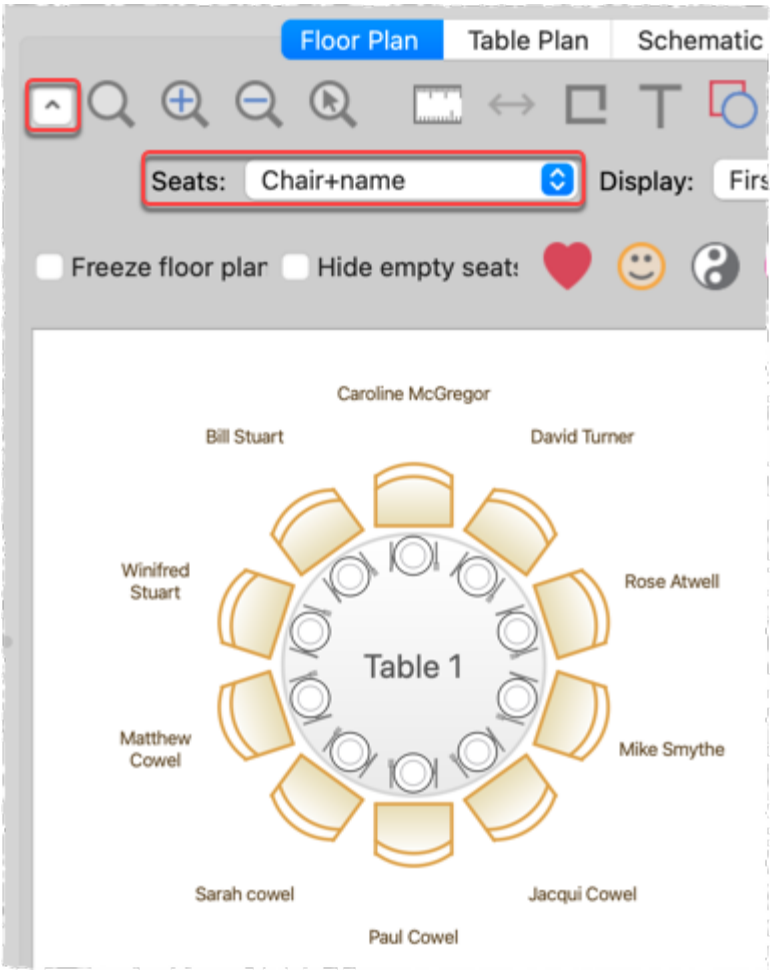
2. Select the appropriate entry from the **Display** drop-down list.

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

1. Click the button at the top left of the pane.

2. Select the appropriate entry from the **Seats** drop-down list.



Example layouts for different **Seats** settings:

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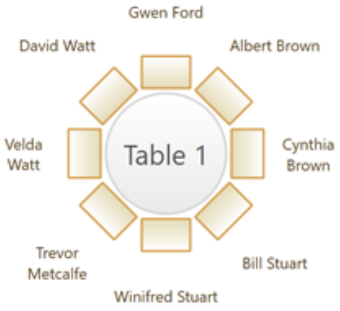
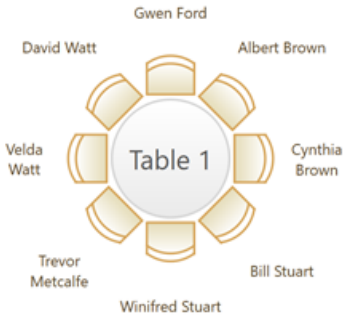
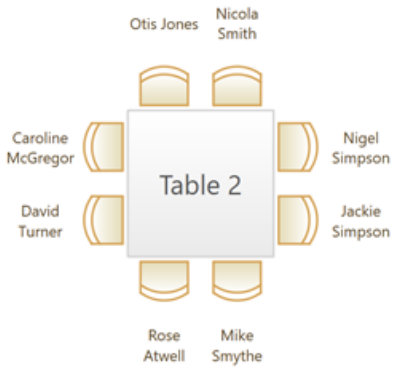
Circular+name

Rectangular+name

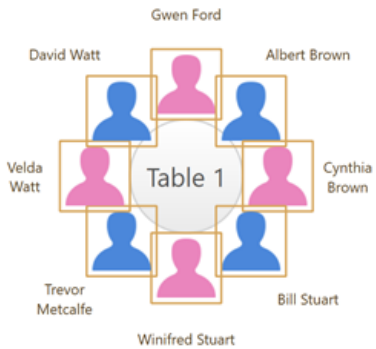


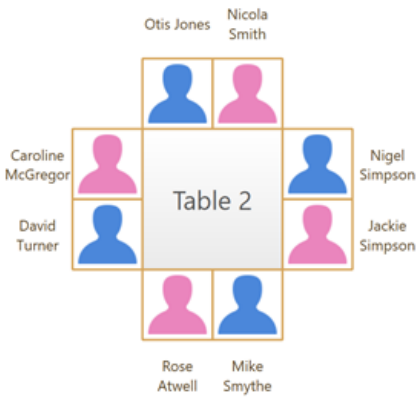
Chair+name





Square image+name





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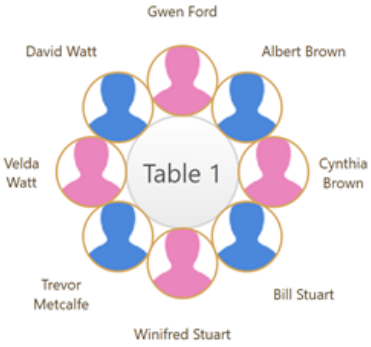
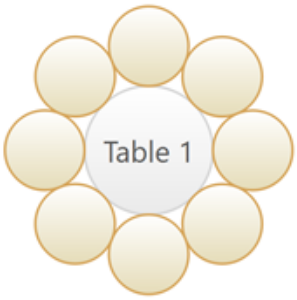
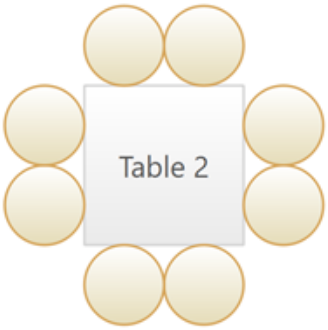
Circular image+name

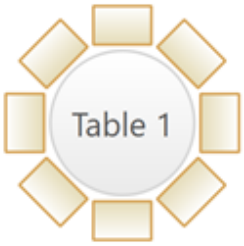


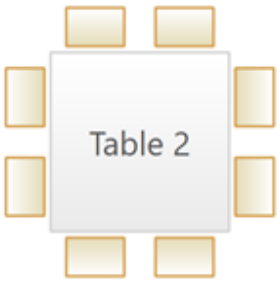
Circular



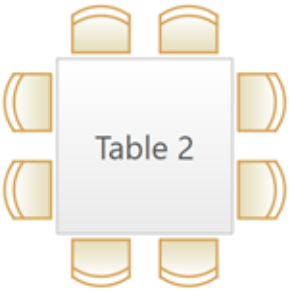


Rectangular





Chair



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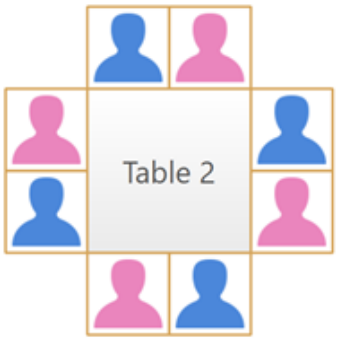
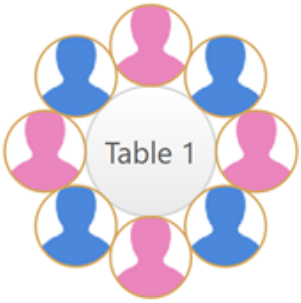
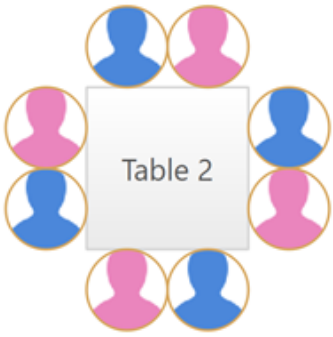
Square image



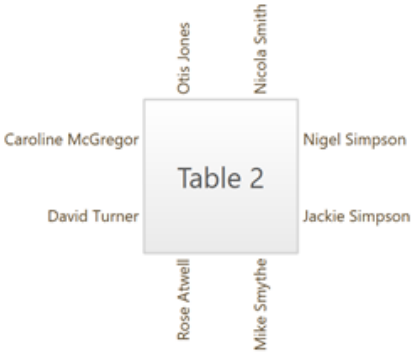
Circular image





Name only

Name only (radial)



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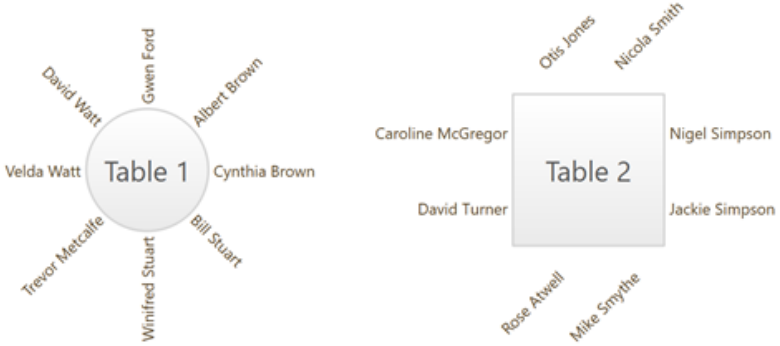
Name only (banquet)



None

Circular seats are the easiest to drag onto. You can always change to a more aesthetic layout later.

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 make it fit.

See also:

- Names and titles
- Show unassigned seats
- Show VIP/Special/RSVP/Locked

3.5.7 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**.

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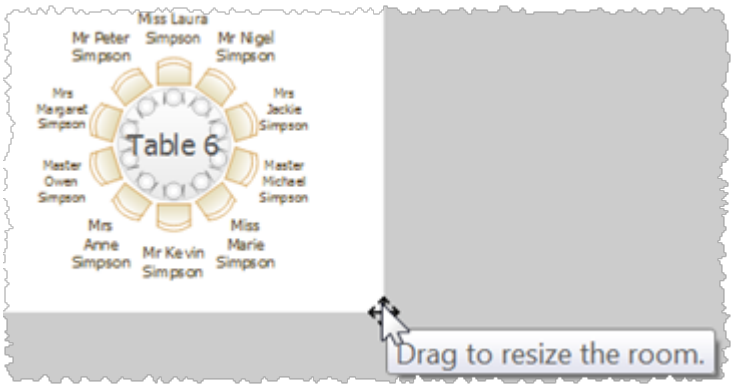
You can also change the size of the floor plan by dragging the bottom-right corner.



See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Create a non-rectangular room
- Handle multiple rooms
- Space tables correctly

3.5.8 Check social distancing

To show social distancing between groups in the **Floor Plan** pane:

1. Click on the button at the top-left of the pane.
2. Click on the button to show the **Table/Seat Spacing** window.
3. Set **Space** to **Seats**.
4. Set **Units** and **Spacing between seats** according to the minimum social distance spacing.

A coloured guide will appear around each seat according to the parameters in the **Table/Seat Spacing** window. The guide will have a diameter equal to **Spacing between seats**. This makes it easy to see whether seats are too close to each other as their circles will overlap. You can control the **Colour** and **Transparency** of these guides. No guides will be drawn for empty seats if empty seats are hidden.

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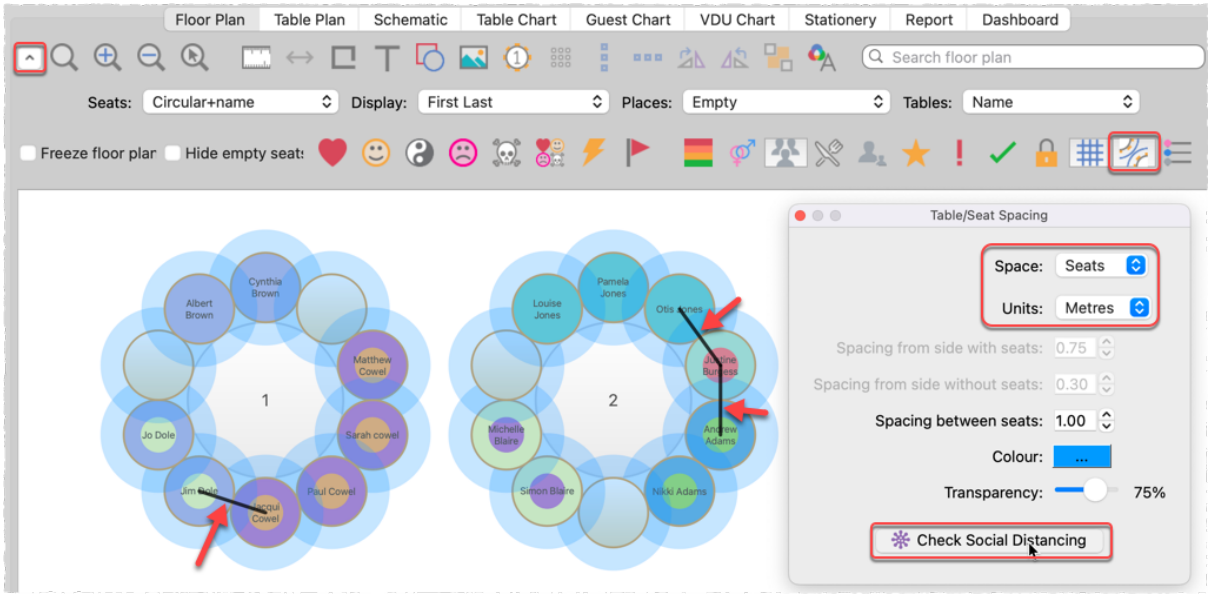
The guide is centred approximately on the position of the occupant's nose and mouth, so it is suitable for calculating social distancing.

Press and hold down the **Check Social Distancing** button to see any guests from different groups that are sat closer than the **Spacing between seats** distance.



You can colour guests by group so you can see if guests close to each other are in the same group.

Click the button again to turn off the spacing guides.

See also:

- Use social distancing
- Space seats correctly
- Space tables correctly

3.5.9 Create a curved row of seats

To create a curved row of seats, **Insert>Row of Seats...** and then set the **Curve** angle to greater than 0.

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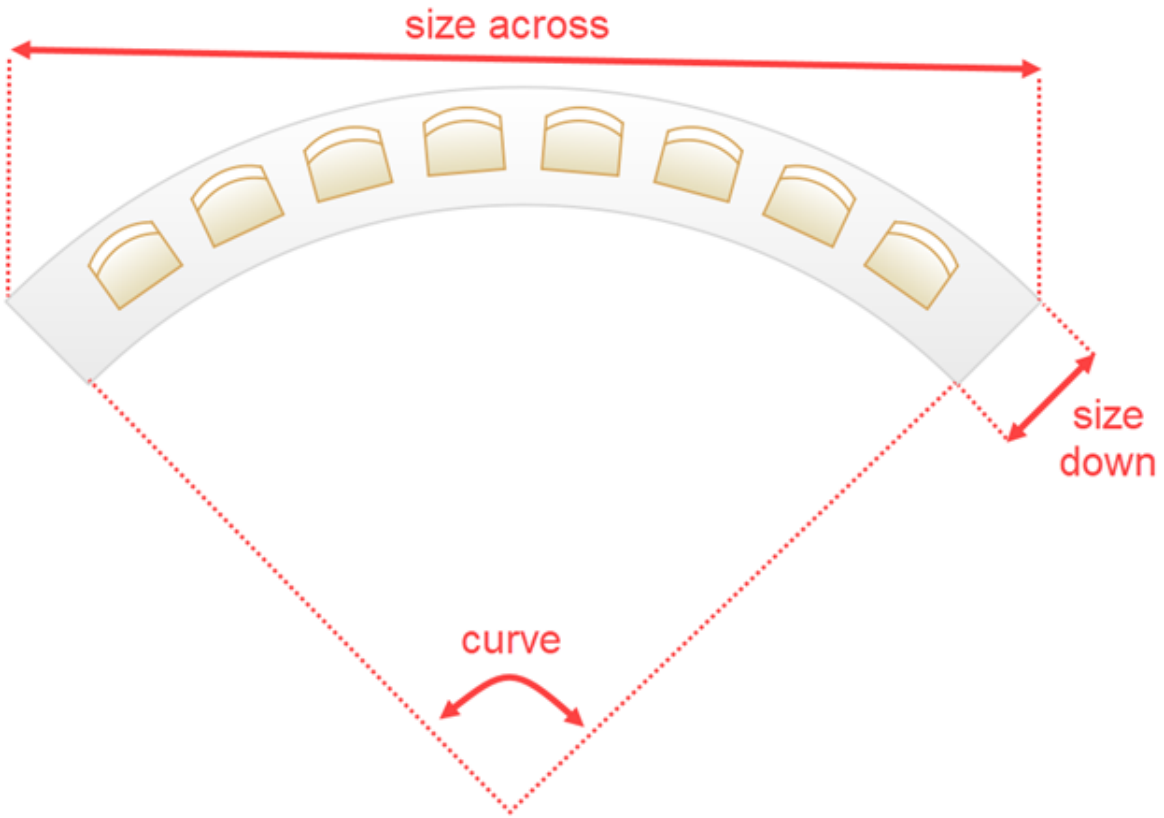

See also:

- Row of seats

3.5.10 Create a non-rectangular room

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

1. Add Walls to the **Floor Plan** pane.

or

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**.

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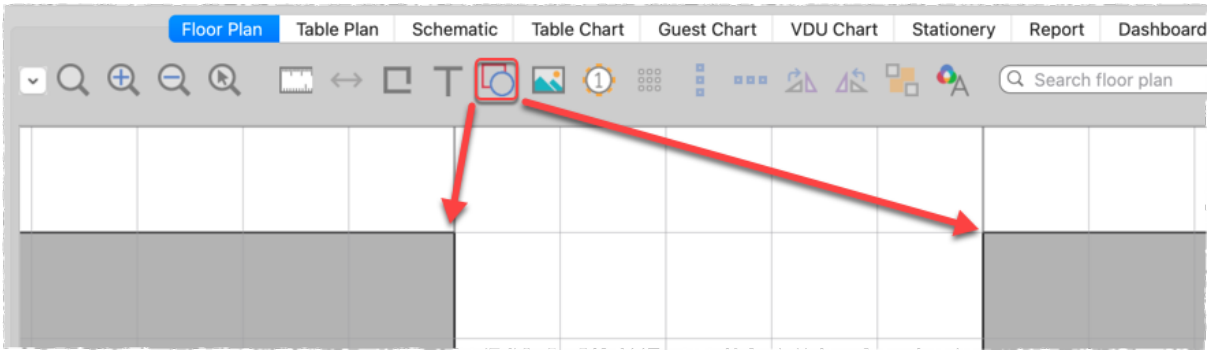
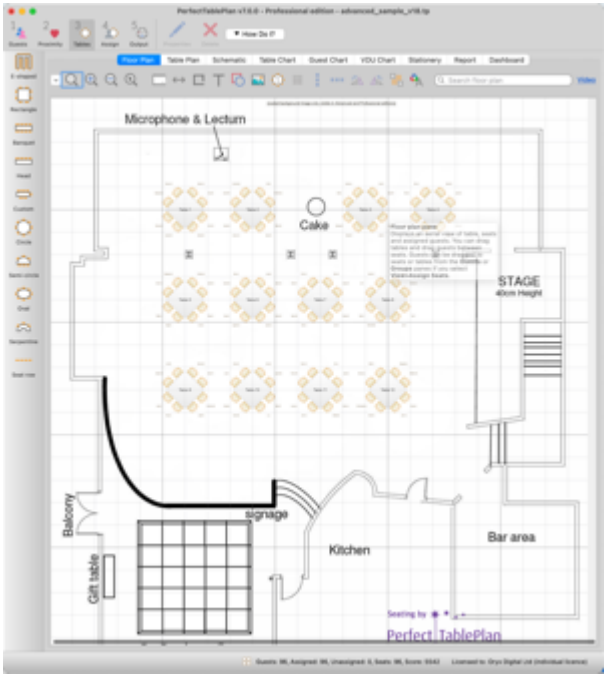
5. Drag the shape to the appropriate position.

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 it as the background to the floor plan.



See also:

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- 🎞Create a floor plan (video with audio, 10:27 minutes)
- Create a re-usable template plan
- Add walls to the floor plan
- Change the size of the room
- Handle multiple rooms

3.5.11 Find free textures

We install a range of textures with PerfectTablePlan. Usually these are installed into sub-folders of your `Documents\PerfectTablePlan\textures` folder.

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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.

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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

3.5.12 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.

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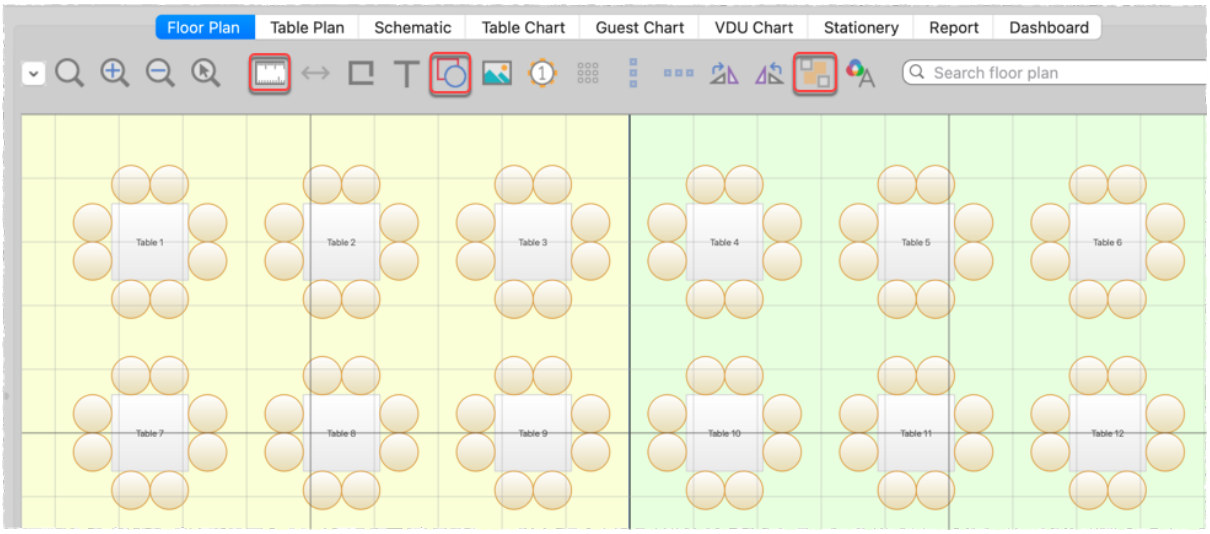

Alternatively you can add walls.

See also:

- Change the size of the room
- Add walls to the floor plan
- Create a non-rectangular room
- Use an image of the venue

3.5.13 Hide empty seats

You can hide empty seats in the **Floor plan** and **Table plan** panes by checking **Hide empty seats**. This can be useful if you want to show gaps in your seating.

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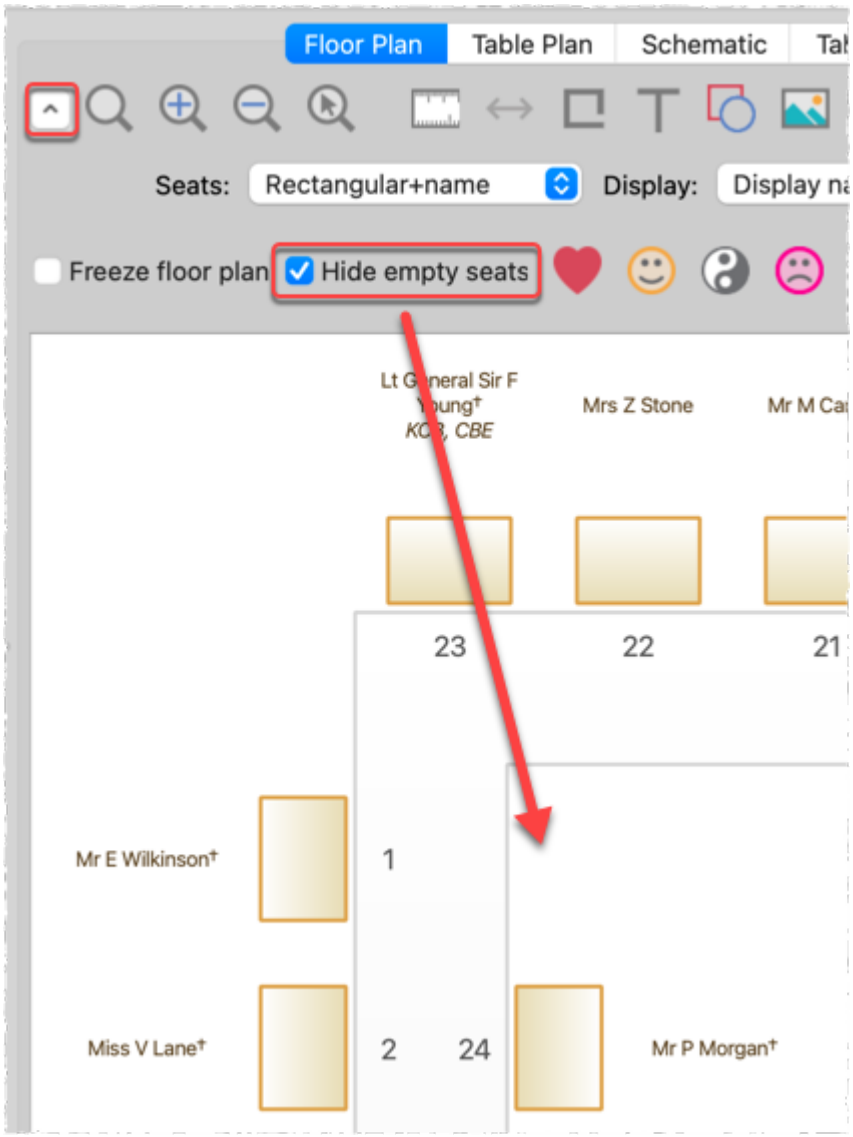

Note Hiding seats makes no difference to the automatic seat assignment algorithm.

See also:

- Create rectangular tables with seats on 1,2 or 3 sides
- Create sweetheart/cabaret tables

3.5.14 Make all names have the same font size

Some times you will see that different names have different font sizes. This is because we can't display all the names at the font size you have chosen. So we

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automatically set the longer names to a smaller font, to stop them being truncated.

If you want the names to use the same font size, you need to either:

1. Shorten the names (e.g. use initials); or

2. Reduce the font size.

You can automatically set the biggest font size that doesn't require any scaling by clicking the **Auto size** button in the **Fonts and Colours** window.

You might also find that it helps to change the name layout to **Name only (radial)** or **Name only (banquet)**.

Changing the font family can also help sometimes.

See also:

- Print legible plans on a small format printer

3.5.15 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.

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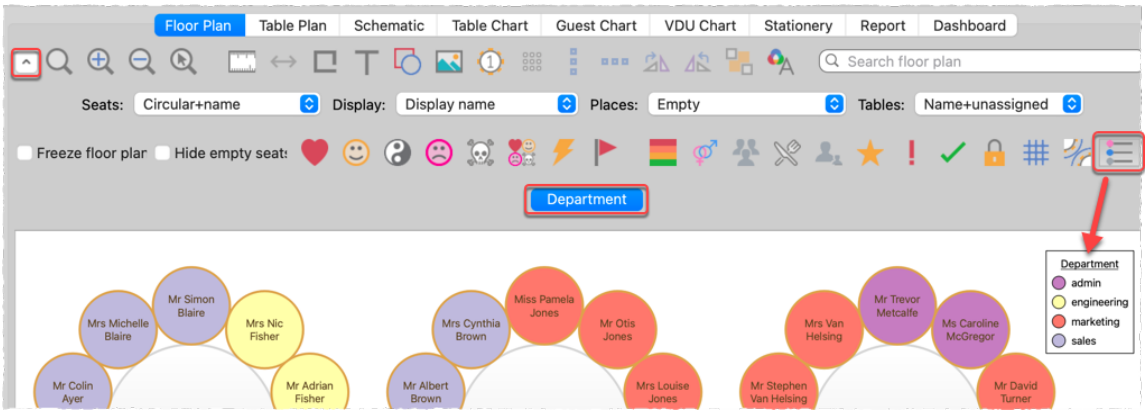

Note that this is only possible if a seat is displayed (e.g. not for **Seats** set to **Name only**).

Depress the button at the top of the pane to show a colour key.

You can also set the **Display** drop-down list to show the values of a custom field.

See also:

- Add custom fields
- Show gender
- Show groups
- Show meals
- Show VIP/Special/RSVP/locked
- Add a colour coded spot to the stationery

3.5.16 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.

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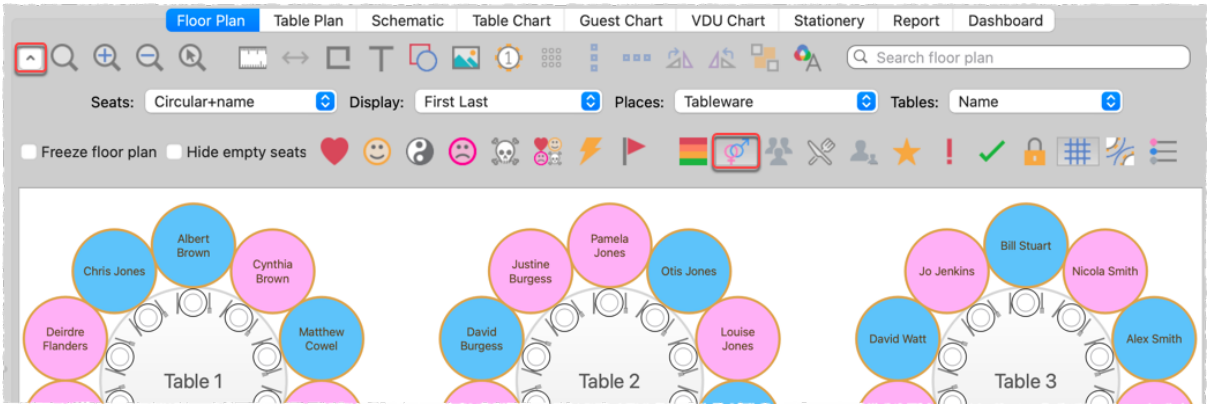
2. Click on the **Gender** button. Males will be shown in blue and females in pink. You can change the colours used in the **Visualization colours** window.



Note that this is only possible if a seat is displayed (e.g. not for **Seats** set to **Name only**).

Depress the button at the top of the pane to show a colour key.

See also:

- Show custom fields
- Show groups
- Show meals
- Show VIP/Special/RSVP/locked
- Add a colour coded spot to the stationery

3.5.17 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.

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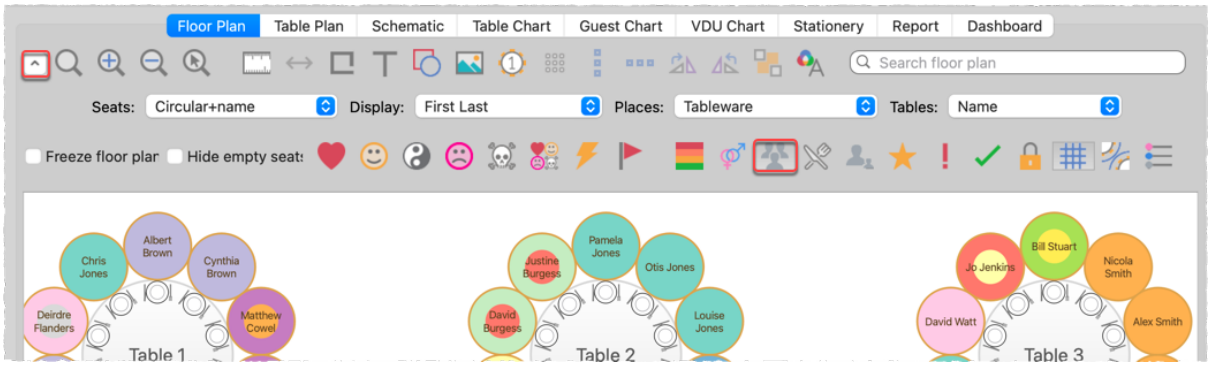

Figure 2:

Note that this is only possible if a seat is displayed (e.g. not for **Seats** set to **Name only**).

Depress the button at the top of the pane to show a colour key.

See also:

- Groups
- Show custom fields
- Show gender
- Show meals
- Show VIP/Special/RSVP/locked
- Add a colour coded spot to the stationery

3.5.18 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.

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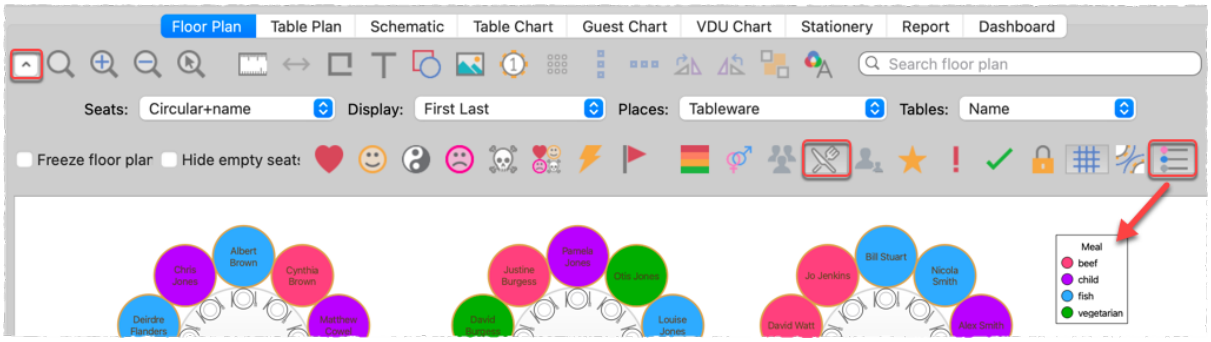

Note that this is only possible if a seat is displayed (e.g. not for **Seats** set to **Name only**).

Depress the button at the top of the pane to show a colour key.

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

See also:

- Meal selection
- Show custom fields
- Show gender
- Show groups
- Show VIP/Special/RSVP/locked
- Add a colour coded spot to the stationery

3.5.19 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.

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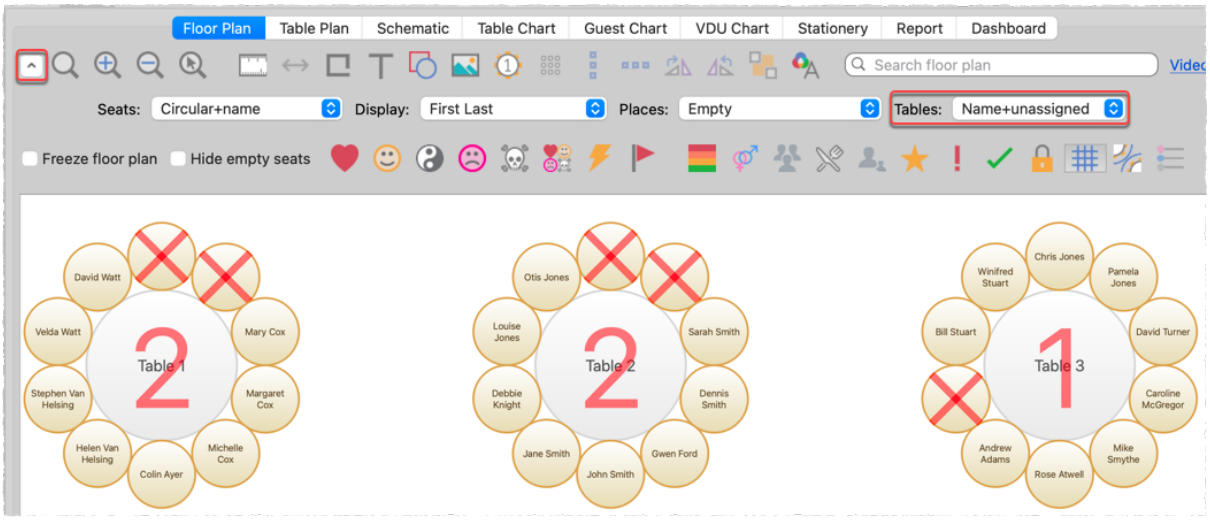
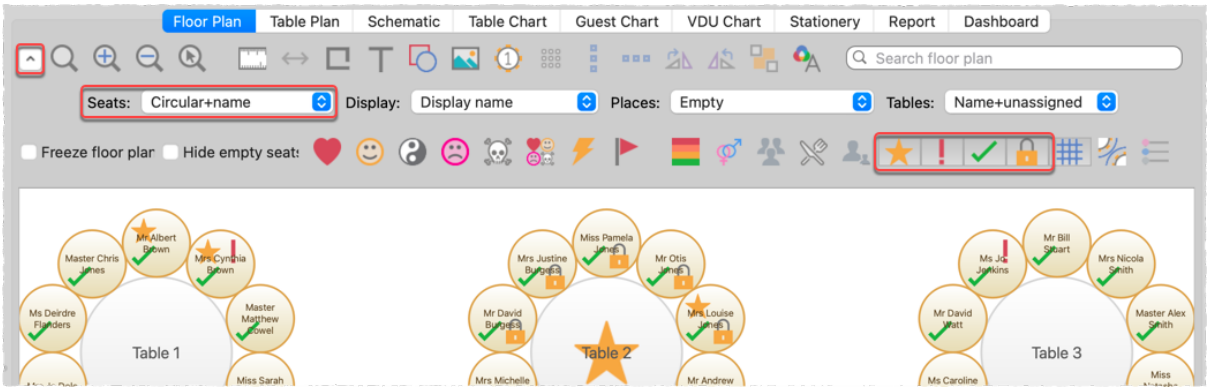


3.5.20 Show VIP/Special/RSVP/locked

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 that this is only possible if a seat is displayed (e.g. not for **Seats** set to **Name only**).

See also:

- RSVP status

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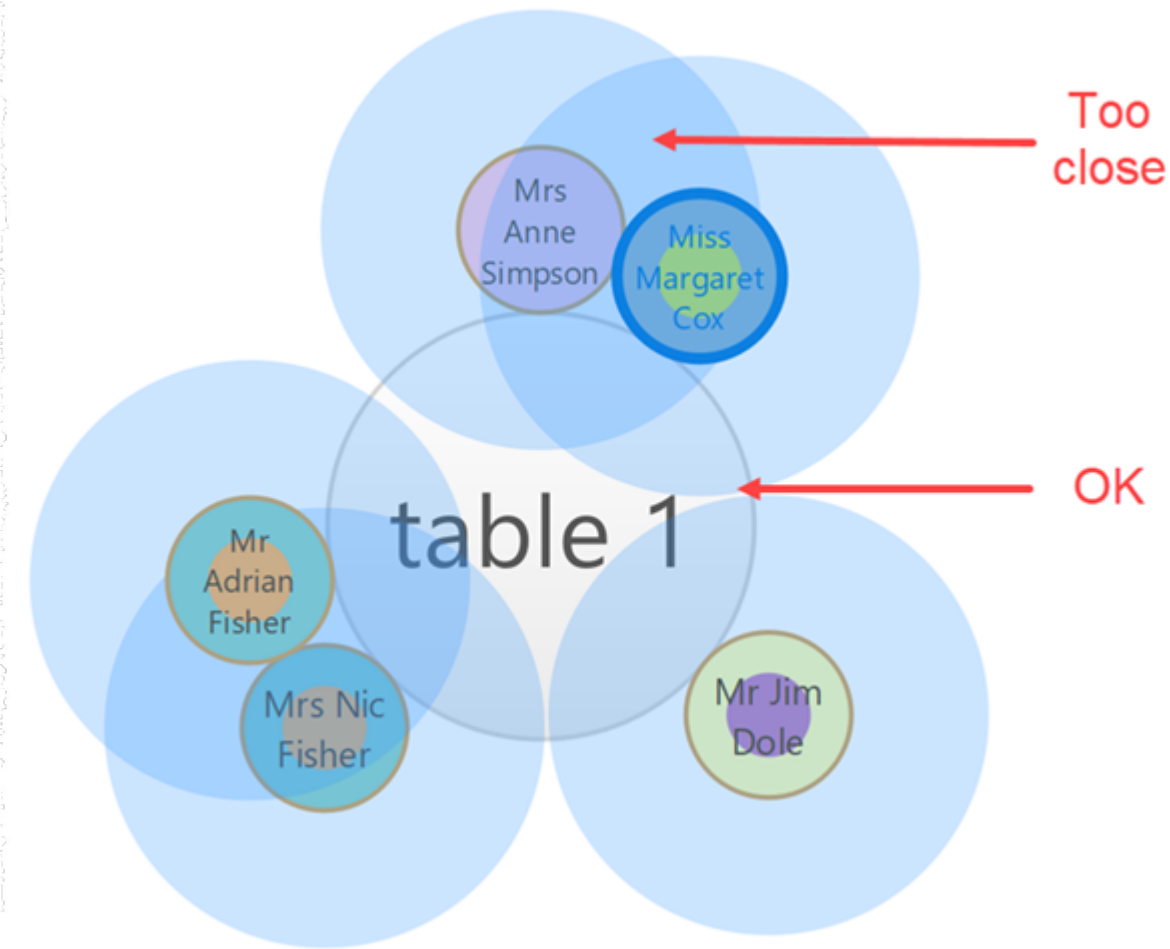
3.5.21 Space seats correctly

To show spacing guides around seats in the **Floor Plan** pane:

1. Click on the button at the top-left of the pane.
2. Click on the button to show the **Table/Seat Spacing** window.
3. Set **Space** to **Seats**.
4. Set **Units** and **Spacing between seats**.

A coloured guide will appear around each seat. The guide will have a diameter equal to **Spacing between seats**. This makes it easy to see whether seats are too close to each other as their circles will overlap. You can control the **Colour** and **Transparency** of these guides. No guides will be drawn for empty seats if empty seats are hidden.



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The guide is centred approximately on the position of the occupant's nose and mouth, so it is suitable for calculating social distancing.

You can colour guests by group so you can see if guests close to each other are in the same group.

Click the button again to turn off the spacing guides.

Note The circular seats are not a realistic size. You may be better off using rectangular seats, chairs or not displaying the seats.

See also:

- Check social distancing
- Space tables correctly
- Change how seats and guest names are displayed

3.5.22 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 to show the **Table/Seat Spacing** window.
3. Set **Space** to **Tables**.
4. Set **Units**, **Spacing from side with seats** and **Spacing from side without seats**.

A coloured guide will appear around each table. This makes it easy to see whether tables have been placed too close to each other. You can control the **Colour** and **Transparency** of these guides.

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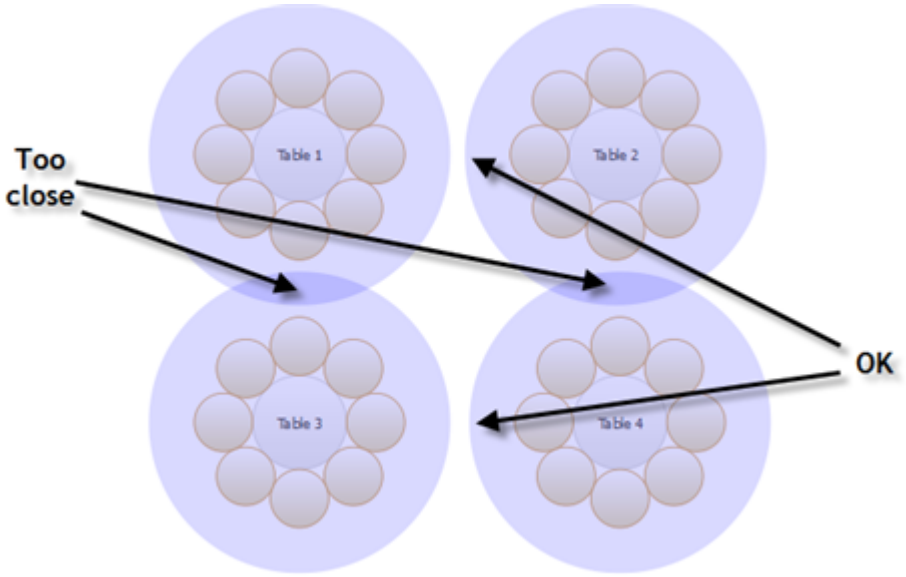
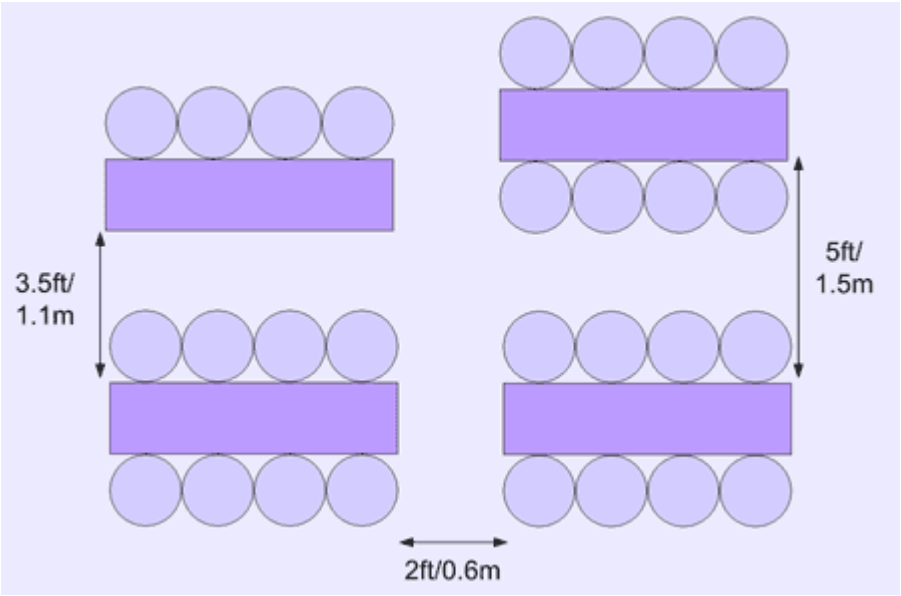


Click the button again to turn off the spacing guides.

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 off using rectangular seats, chairs or not displaying the seats.

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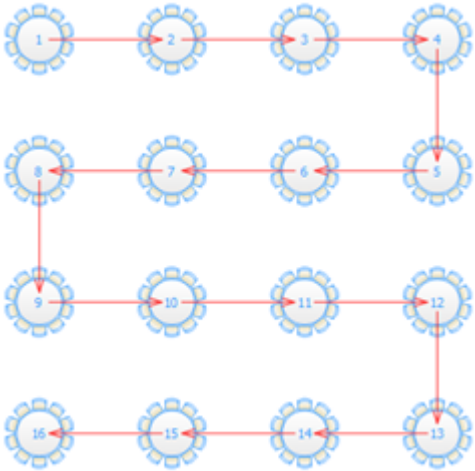
If most of your tables are the same size and shape and you want to space them evenly, you can create a snap grid of the appropriate size. For example, if your tables are 2m in diameter and you want 1.5m between them, you can create a 3.5m snap grid to snap the table centres to.

Spacings are not shown for rows of seats.

Professional edition only

You can use the **Table Layout** window to quickly lay out tables in a wide range of configurations with a choice of horizontal and vertical spacings.



Important Don't forget about emergency exit routes and fire regulations when you set-up your floor plan.

See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Check social distancing
- Space seats correctly
- Change the size of the room
- Turn the floor plan grid on/off

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- Align tables

3.5.23 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:

- Create a floor plan (video with audio, 10:27 minutes)
- **Dimensions** window
- Align tables
- Space tables correctly

3.5.24 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.

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Note If your image is in PDF format, you will need to convert to an image format (such as PNG) before you can import it to PerfectTablePlan. There are various ways to do this, for example you can use an online PDF to PNG converter such as zamzar.com, easypdf.com or pdf2png.com (use of third party websites is at your own risk). Our you can do a screen capture of the PDF and save it as a PNG image file.

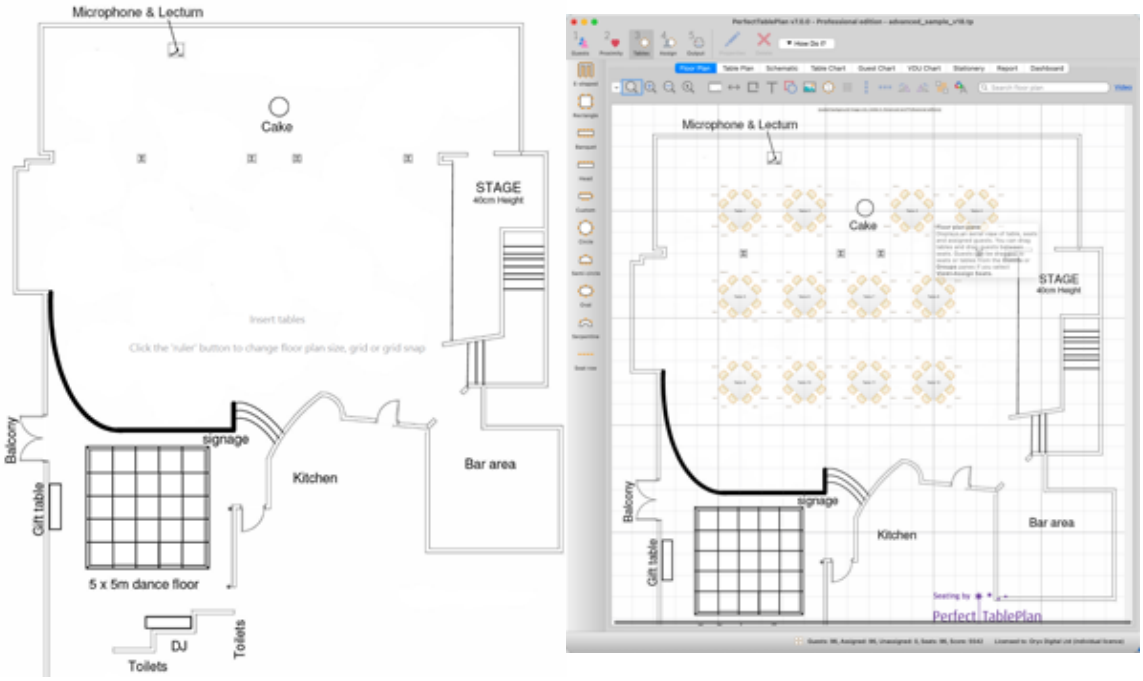
1. Click on the **Dimensions** button at the top of the **Floor plan** pane. The **Dimensions** window will appear.

2. Click on the **Choose...** button and select an image file.

3. Set the **Background image size** to the size the image should be in the floor plan (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.



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scaled floor plan image

image used as floor plan background with tables added

Scaling the image correctly

If you are using an image of the venue as a background image, it is important to scale it correctly. This is easy as long as you know the size of a feature on the floor plan:

- Add a background image, if you haven't done so already (see above).
- Identify a feature in the floor plan that you know the size of. This might be a scale marked on the floor plan or a wall or stage whose dimensions are known. For accuracy, the bigger the feature the better. Zoom in/out so this feature fills most of the screen.
- Click the ↔ button at the top of the **Floor plan** pane.
- The **Scale Background Image** window will appear. Choose **Free**, **Horizontal** or **Vertical** depending on the orientation of the feature identified.
- Click on one end of the feature. Release the mouse button (it isn't a drag operation).
- Move the mouse pointer to the other end of the feature. An arrow will be drawn between the mouse position and the first position clicked.
- Click on the other end of the feature.

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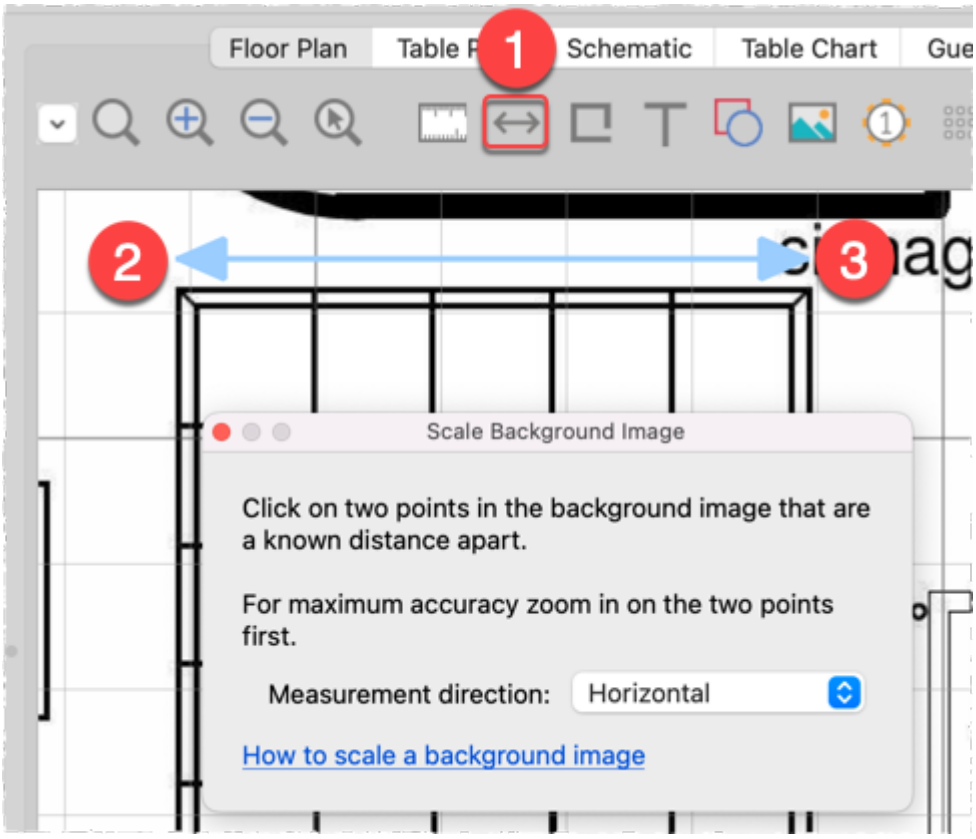
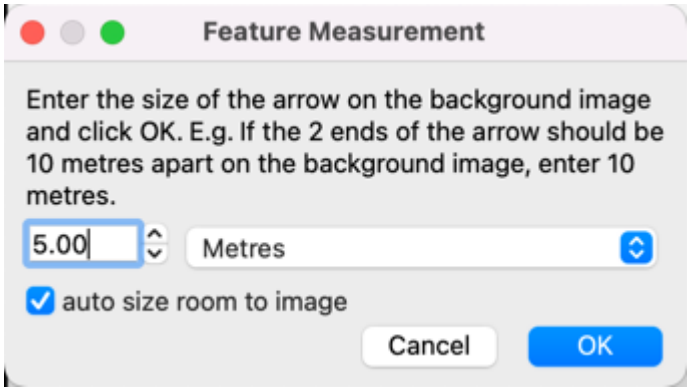


- The ↔**Feature Measurement** window will appear. Enter the size of the feature on the background image in the appropriate units. E.g. if the feature should be 5 metres in size, enter 5.00 metres. Generally you will want to leave **auto size room to image** checked, so that the room is sized to the image.



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- Click **OK**. The background image will now be scaled so that the feature you identified is the correct size.
- If you aren't happy with the results you can **Edit>Undo** the changes.

You can verify the feature is now the correct size by creating a rectangle of an appropriate size and comparing it to the feature in the background image.

Hint When the ↔**Feature Measurement** window appears, it shows the length of the arrow on the floor plan. This can be useful for measuring the distance between two points. Click **Cancel** if you don't want to change the scale.

See also:

- Scaled venue images (video with audio, 2:06 minutes)

See also:

- Create a floor plan (video with audio, 10:27 minutes)
- Change the size of the room
- Add walls to the floor plan
- Turn the floor plan grid on/off

3.5.25 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.

If your device supports gestures, you can also use a 'pinch' gesture to zoom in and out.

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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 Change the order of guests in a group

To change the order in which guests are displayed within a group, for example in the **Table Chart** , **Guest Chart** or **Stationery** pane:

- Double-click on a group in the **Groups** pane (or a guest belonging to that group in the **Guests** or **Groups** pane).
- In the **Group** tab, change the guest order by:
  - Selecting 1 or more guests and clicking the **Up** or **Down** buttons; or
  - Dragging the guests to new positions

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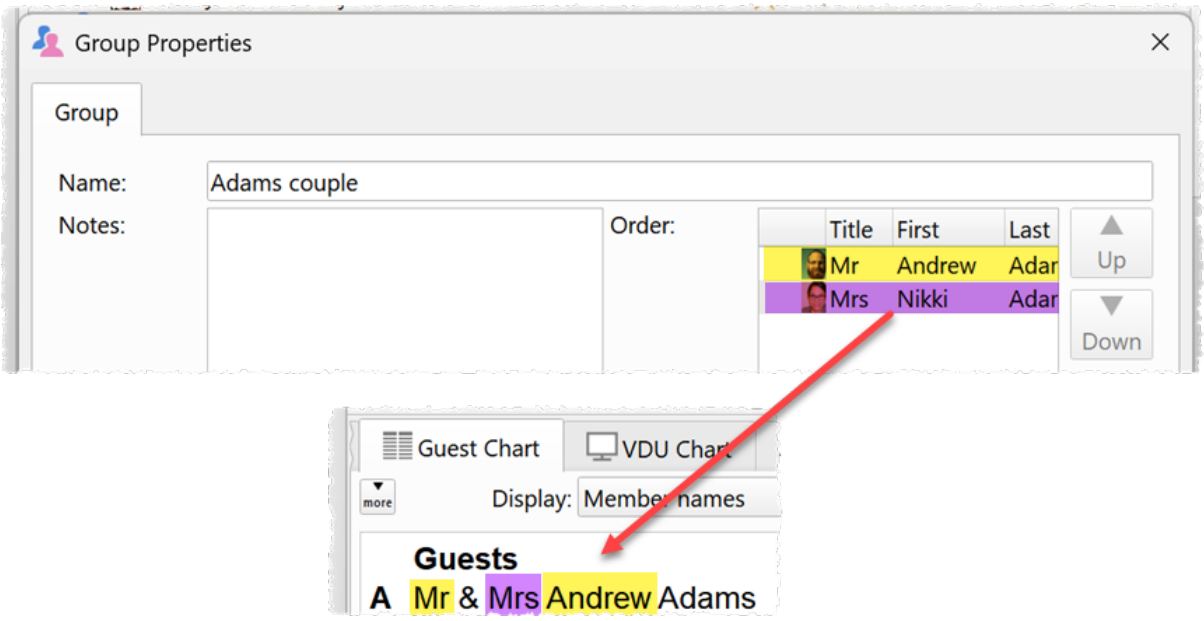

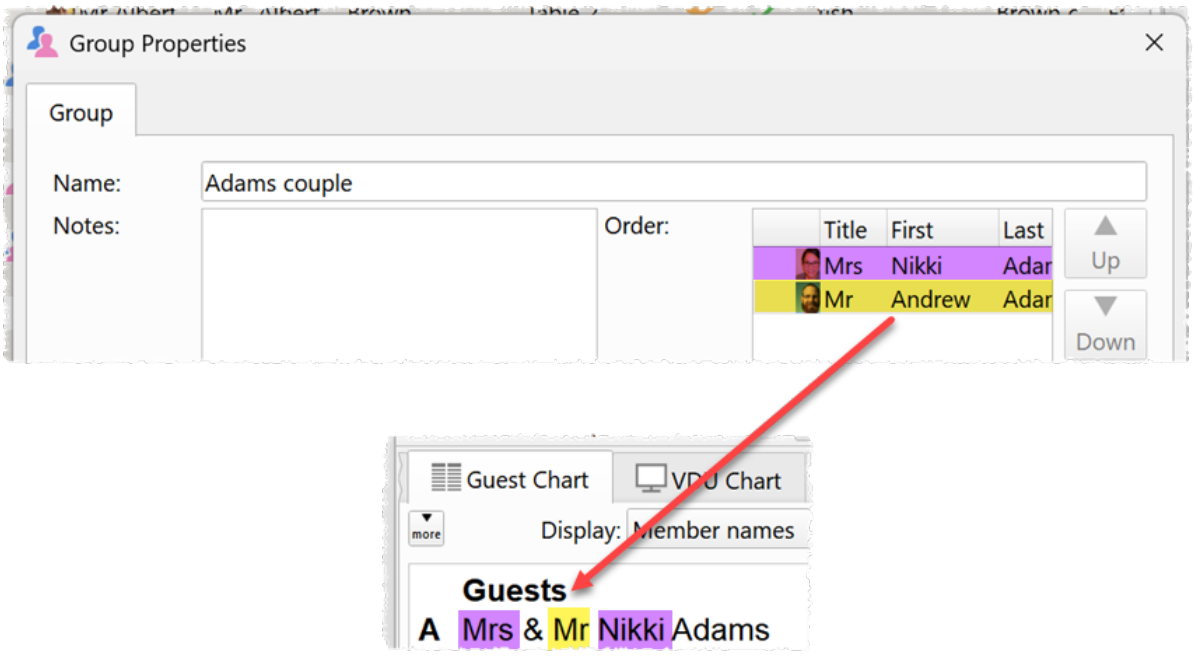

Note Guest order in the **Groups** pane depends on how the pane is sorted, not on the order in the **Group** tab.

3.6.2 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.

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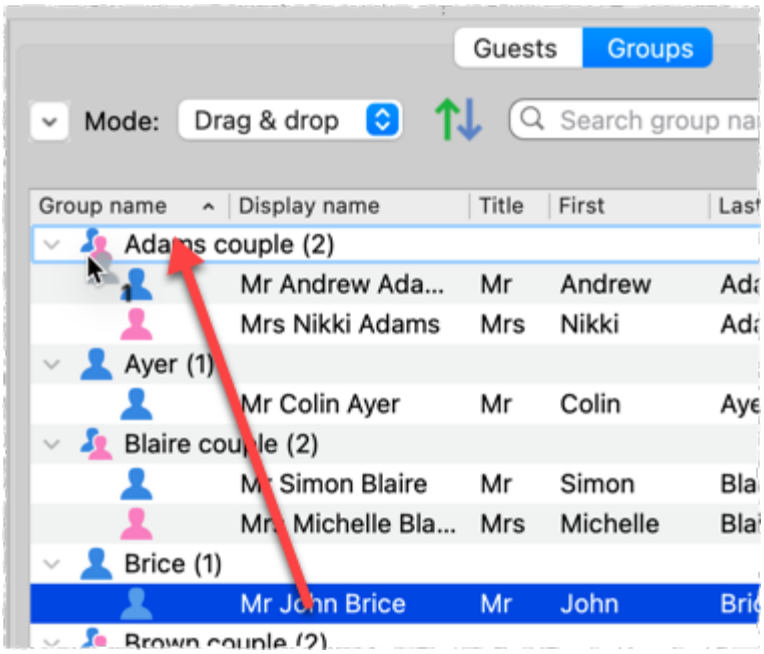
2. Choose **Add to existing** from the **Group** drop-down list in the **Group** tab.

See also:

- Move a guest from one group to another
- Change the order of guests in a group
- Groups

3.6.3 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.

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Note that changing does not change a guest's proximity for the automated seating. You can change the proximity of a couple to **Next to** by selecting both guests and then selecting **Edit>Proximity>Next to**.

You can delete any empty groups from the **Groups** pane once you have finished.

See also:

- Insert a new guest into an existing group
- Change the order of guests in a group
- Groups

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 fit into the standard fields. You can use a custom field to do this. To add a custom field:

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

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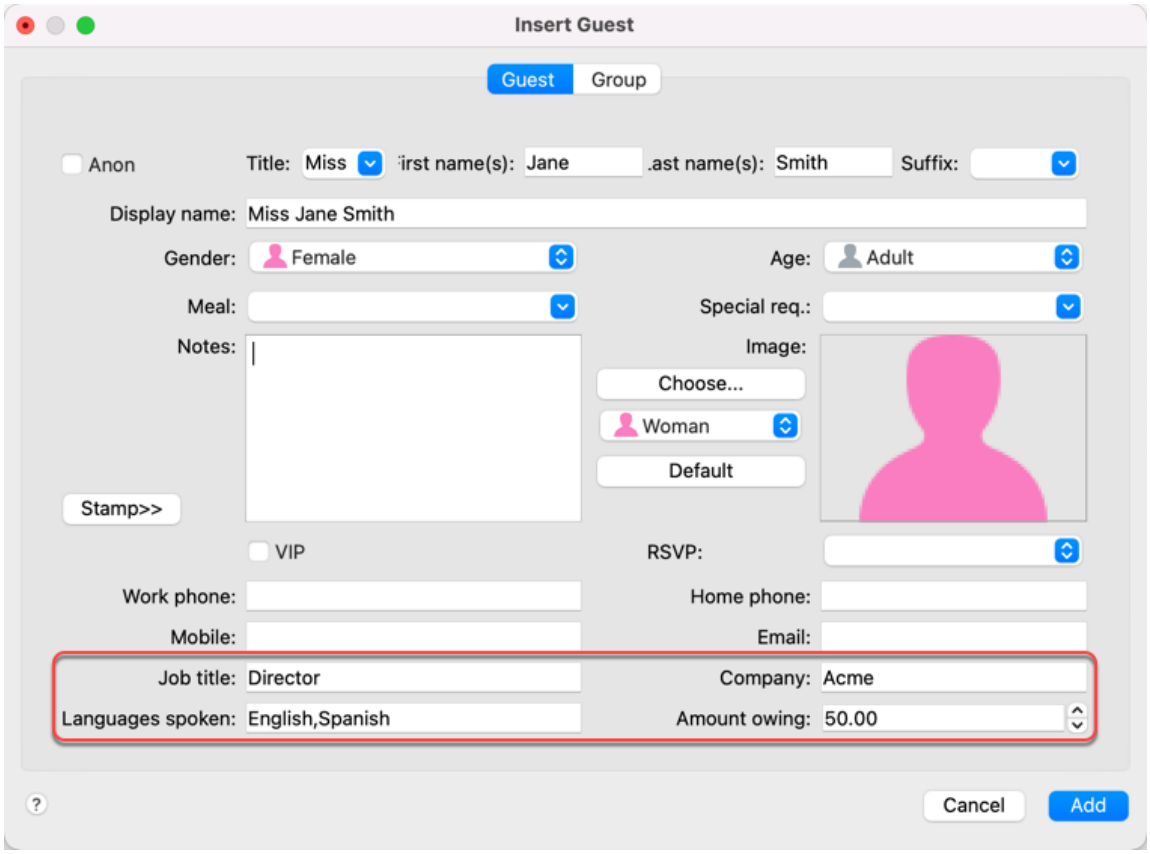

You can also create custom fields during import by selecting **<custom field>** from the drop-down menu at the top of an import column.

Custom fields are fully integrated into PerfectTablePlan. For more information see Custom fields.

See also:

- 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

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international relations you can toggle between the two by using the ⌘+*period* (in the **Main** window hold down the ⌘ key and press the '.' (*period)* key). If you don't like the results you can undo them.

If you want to use "Mr." (with a period) as standard you should edit the titles available in the **Titles** tab of the **Preferences** window.

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. You may have to duplicate the `PerfectTablePlan.app` file before you can do this.

2. Select the guests you want to copy from the **Guests** or **Groups** pane of the first instance of PerfectTablePlan (⌘+*A* to select all).

3. Drag the guests/groups to the **Guests** pane of the second instance of PerfectTablePlan.

You can also export the guest data to a .csv file and re-import it, but drag and drop is easier.

Custom fields are not copied when you drag guests between 2 plans. If you want to preserve custom fields you need to export the guest data to .csv and import.

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

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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. Either:

- Click on **Add**, to add one title with a default gender, age and VIP status; or
- Click on **Import from current plan** to import all the titles in the current plan; or
- Click on **Add text list...** to paste in a text list, one per line; or
- Click on **Add pre-defined** to add one of the pre-defined lists.

4. Click **OK**.

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
- Assign seating by order of precedence

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 ⌘+click/⇧+click (⌘+*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.

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2. Select **Edit>Guest Property** and then choose the appropriate property and value. Choosing **...** will display the **Edit Guest Property** window.

Or

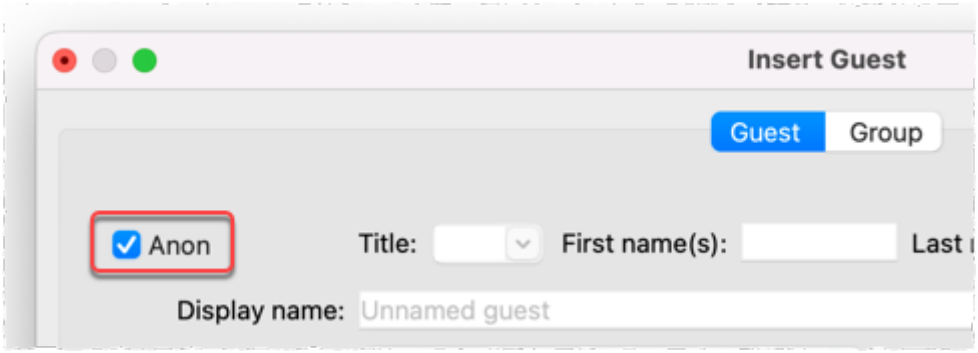
1. Use the **Replace Text** window (text properties only).

See also:

- Edit multiple guest properties (video with audio, 1:48 minutes)
- 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:

Or use "+n" in the **Quick Add Guests** window:

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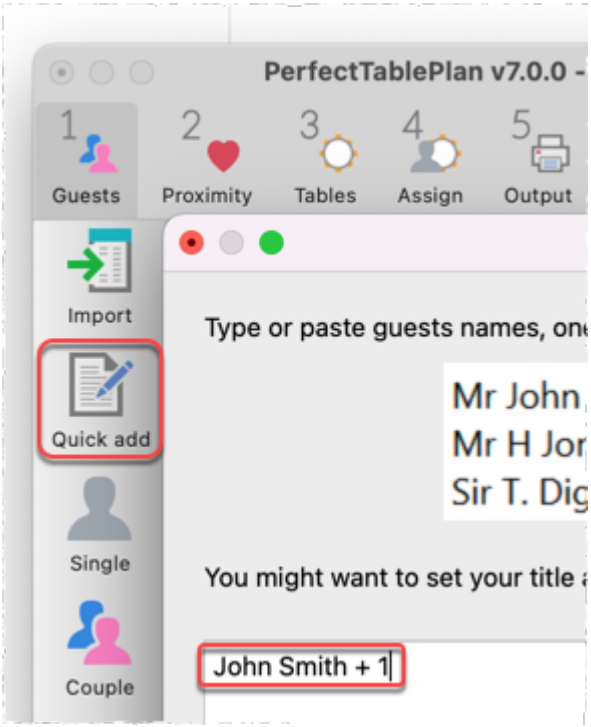

You can uncheck the **Anon** box and add their name if you find it out later.

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.

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(s)	John
Last name(s)	Smith
Suffix	PhD

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Display name	Sir John Smith PhD

You can add a list of standard suffixes to the **Suffixes** tab of the **Preferences** window. These suffixes will then be available on the **Suffix** drop-down list in every plan. PerfectTablePlan will also be able to recognize them as suffixes during import.

See also:

- Names and titles
- Customize standard guest titles

3.7.9 Keep guests in import order

PerfectTablePlan doesn't preserve the order that guests are imported.

Advanced and Professional editions only

If you want to keep the guests in the same order that you imported them:

1. Add a column with the numerical order to the guest list, before you import it.

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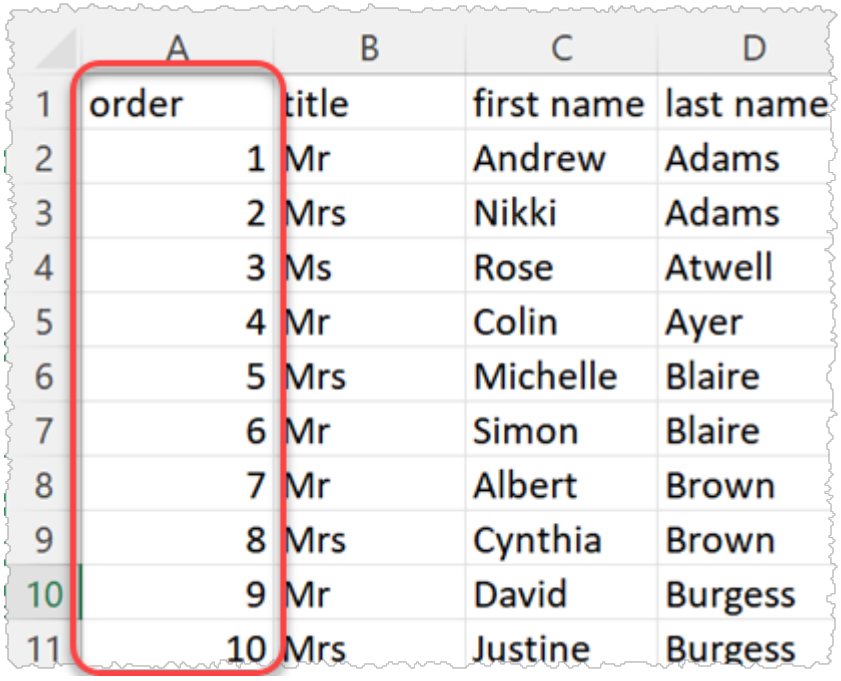
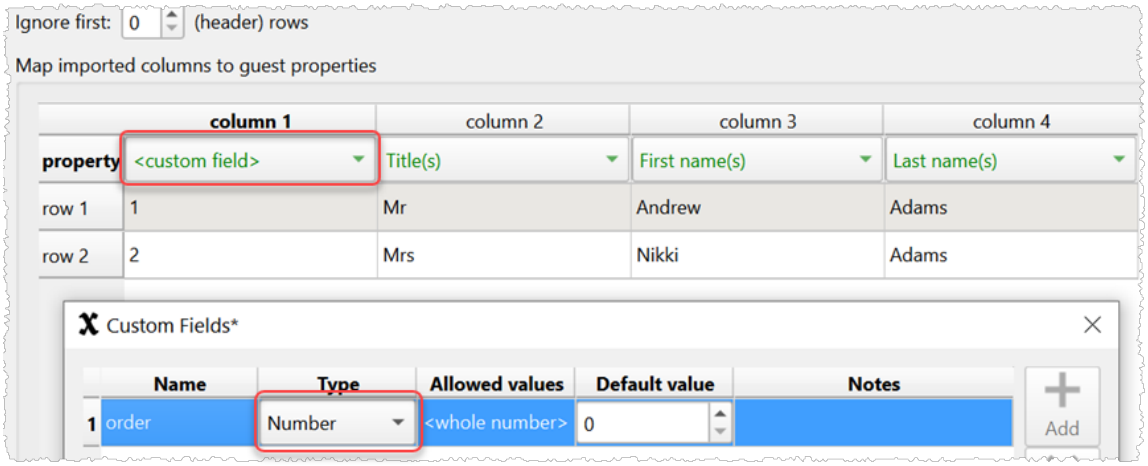


	A	B	C	D
1	order	title	first name	last name
2	1	Mr	Andrew	Adams
3	2	Mrs	Nikki	Adams
4	3	Ms	Rose	Atwell
5	4	Mr	Colin	Ayer
6	5	Mrs	Michelle	Blaire
7	6	Mr	Simon	Blaire
8	7	Mr	Albert	Brown
9	8	Mrs	Cynthia	Brown
10	9	Mr	David	Burgess
11	10	Mrs	Justine	Burgess

2. Import this column as a custom field of type **Number**.



3. Order guests by clicking on the header of the order column (click a second time to reverse the order) or using the **Multi-level Sort** window.

See also:

- Assign seating by order of precedence

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3.7.10 Order guests by title or suffix

You can order guests non-alphabetically by their title or suffix in the **Guests** pane and **Groups** pane.

Order by title

Enter all the titles into the **Titles** tab of the **Preferences** window.

- If you have already imported guests with their titles use **Import from current plan**.
- If you have a text list, you can paste it in using **Add text list...**.
- Or you might be able to use one of the lists provided in **Add pre-defined...**.

Sort your titles into order using the **Up** and **Down** arrows, with the highest ranking at the top.

Set **Sort titles in 'Guests' and 'Groups' pane** to **As shown above**.

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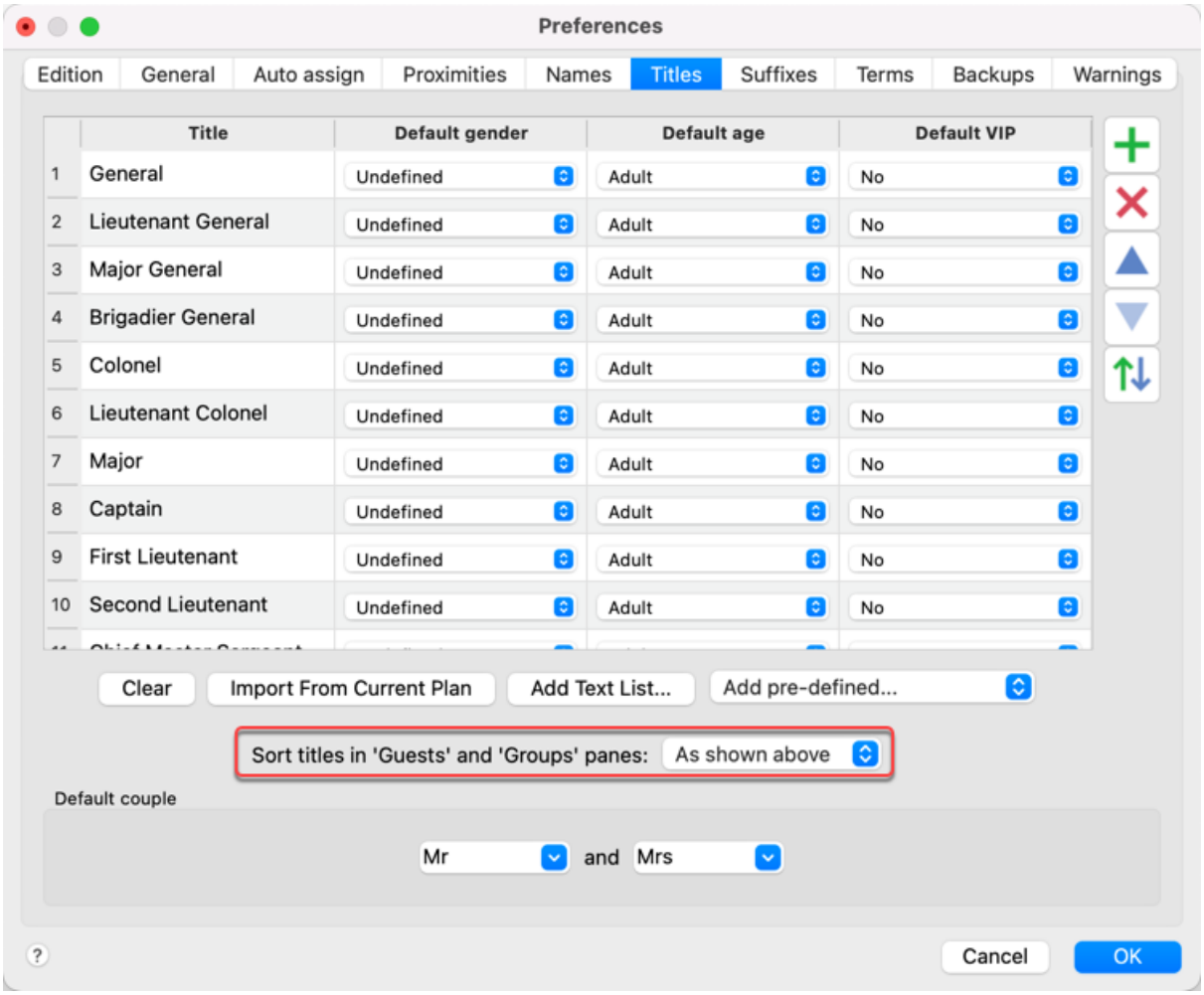
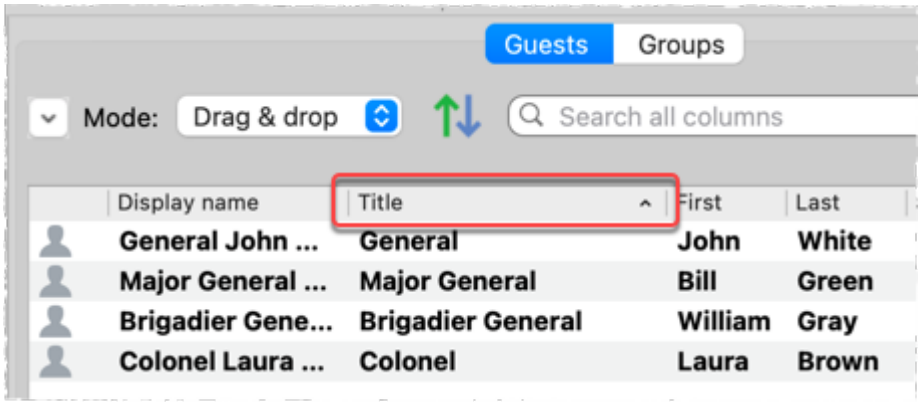


Go to the **Guests** pane and click on the **Title** column The guests will now be sorted by their title, in rank order. Click again to reverse the order.



Order by suffix

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Similarly you can order non-alphabetically by suffix using the **Suffixes** tab of the **Preferences** window.

3.7.11 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 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 the HTML line break tag *
* in the guest **Display name** field, e.g.:

```
Mr John Smith<br>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

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3.7.12 Track details of non-seated guests

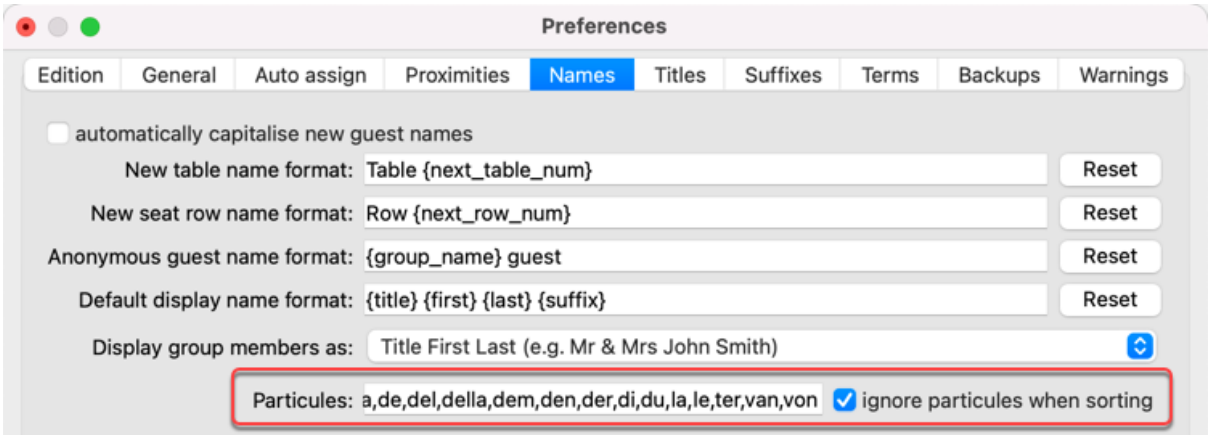
You may have guests that are attending your event, but won't require a seat at the dinner. We recommend that you track their RSVPs as normal but lock them with no seat assigned to ensure they won't be inadvertently assigned a seat. You might also want to add a reminder in their **Notes** field, e.g. "evening only guest".

3.7.13 Turn on/off guest name capitalisation

To turn on/off the automatic capitalisation of new names typed in the **Insert Guest**, **Insert Couple**, **Insert Family** or **Insert Group** window, check/uncheck **automatically capitalise new guest names** in the **Names** tab of the **Preferences** window.

3.7.14 Use particules in names

PerfectTablePlan can handle 'particules' (last name prefixes used in French, Dutch, German, Italian and other languages). For example 'Johannes van der Waals' has last name 'van der Waals' but can be optionally listed under 'W' (rather than 'v') in the **Guest Chart** pane. PerfectTablePlan will also know to split 'Johannes van der Waals' into first name='Johannes' and last name='van der Waals' when importing. You can specify particule behaviour using the **Particules** and **ignore particules when sorting** fields in the **Names** tab of the **Preferences** window.



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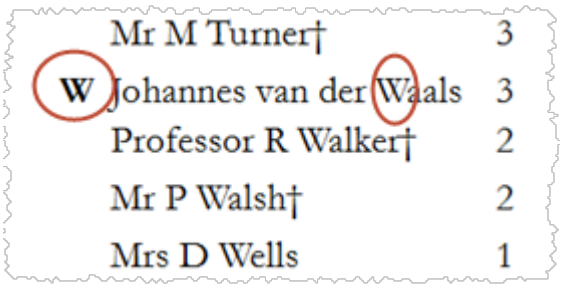

3.8 Importing

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:

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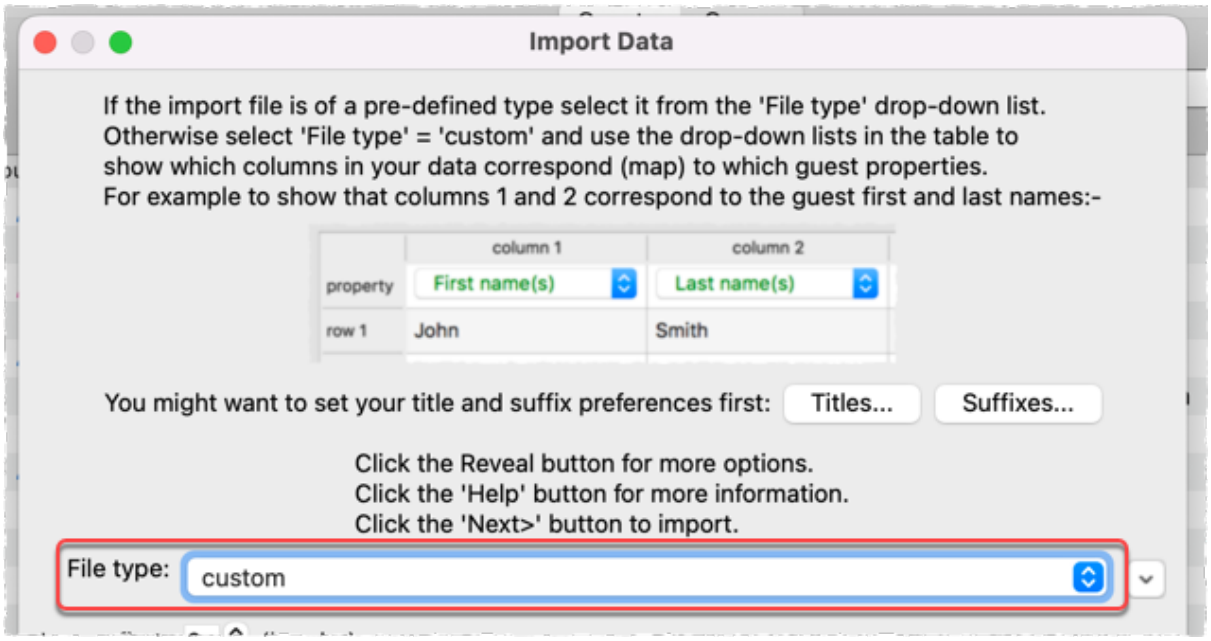

Advanced and Professional editions only

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:

- Import your guest list (video with audio, 11:59 minutes)
- Example import formats
- Import guests tutorial

3.8.2 Import guest details from Apple Address Book

To import guests from Apple Address Book to PerfectTablePlan:

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1. select the appropriate group(s) or person(s) in the Apple Address Book

2. drag them to the **Guests** pane or **Groups** pane in PerfectTablePlan

Guests in the same group will have their proximity set to 'Near to'. You can easily change this by right-clicking on the group and changing the proximity. PerfectTablePlan will attempt to maintain groups, but you can easily rearrange guests into groups afterwards by dragging guests between groups in the PerfectTablePlan **Groups** pane.

See also:

- Importing guests from vCard files
- Importing

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:

- Import your guest list (video with audio, 11:59 minutes)
- Import guests tutorial
- Example import formats

3.8.4 Import guest details from Outlook

Outlook is not available on Mac.

3.8.5 Import guest details from Outlook Express

Outlook is not available on Mac.

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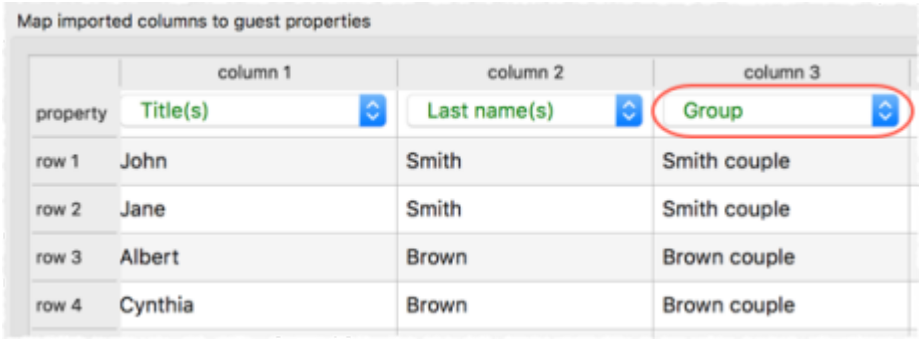
3.8.6 Import guests in couples/families/groups

You can import guests in groups by using a 'group' column during import. For more details see Importing groups here.



By default, guests imported in groups will have proximity set for that type of group in the **Preferences** window.

See also:

- Import your guest list (video with audio, 11:59 minutes)
- Import proximity data
- Example import formats
- Import guests tutorial

3.8.7 Import proximity data

Professional edition only

To import proximity data by guest:

1. Select **File>Import.**

2. Choose **Excel/CSV/text file.**

3. Click **OK.**

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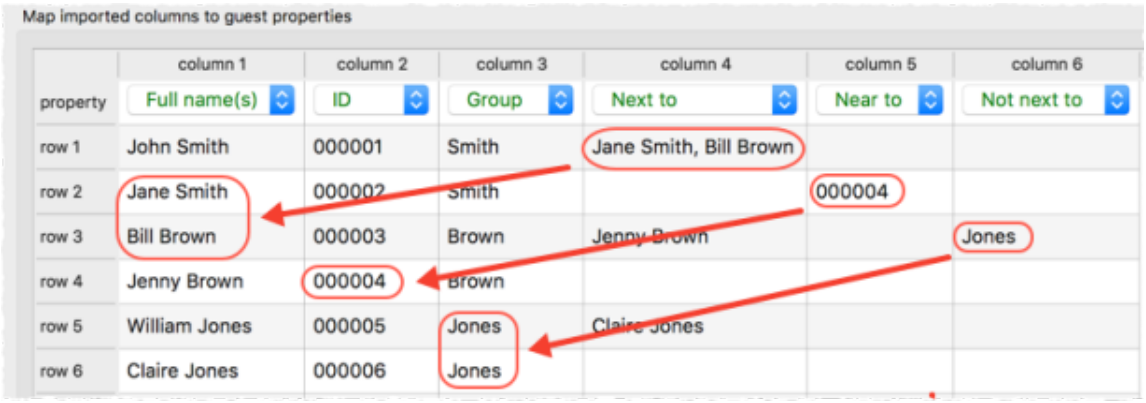
4. Select a file to import. The **Import Data** window will appear.

5. Set guest name and other columns as usual.

6. Set the **Next to**, **Near to**, **Near not next to**, **Not next to** and/or **Not near to** columns.

7. Click **OK**.



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**, **Near not next 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 (,).
- Proximities are set in the following order: **Near not next to** then **Near to** then **Not next to** then **Next to** then **Not near to**. E.g. if 2 guests are set to have both **Near to** and **Next to** proximity, the **Next to** proximity will 'overwrite' the **Near to** proximity.
- When cross referencing proximities against guests PerfectTablePlan will match in the following order:

  o cross reference=guest ID

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o cross reference=guest display name

o cross reference=group name

o 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
- Change proximity for multiple guests

3.8.8 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.**

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3. Choose **Excel/CSV/text file.**

4. Click **OK.**

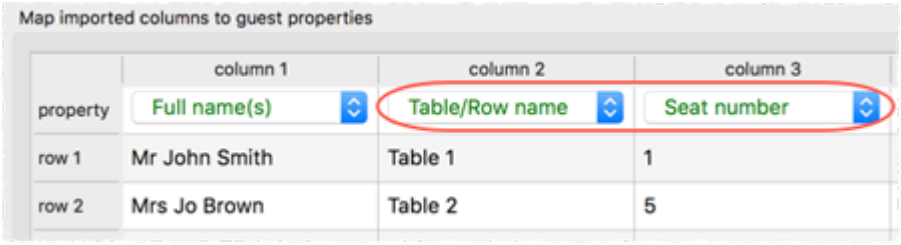
5. Select a file to import. The **Import Data** window will appear.

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**.



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.

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See also:

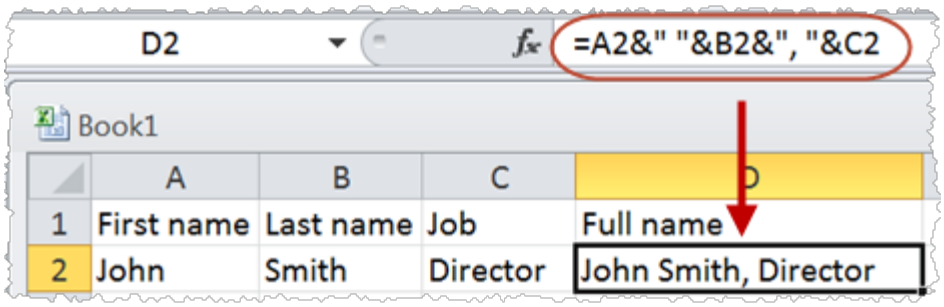
- Import seating data (video with audio, 0:25 minutes)
- Import your guest list (video with audio, 11:59 minutes)
- Example import formats
- Import guests tutorial

3.8.9 Join and split columns

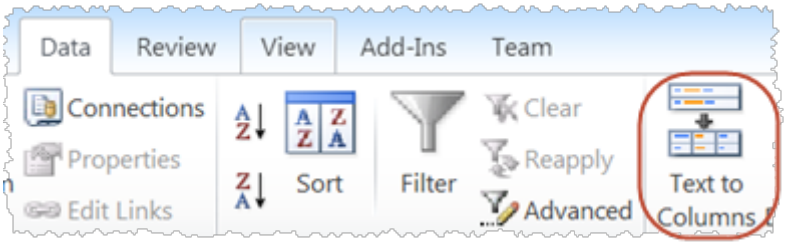
PerfectTablePlan can handle many different import formats for guest lists. But sometimes you might need to join or split columns in your guest list to get it into the correct format for importing. You can do this either in a spreadsheet before you import or using PerfectTablePlan join and split operations after you import.

Joining and splitting columns in Excel

You can use the Excel concatenation operation (&) in Excel to join 2 columns. For example:



You can use the **Text to Columns** operation in Excel to split a column.



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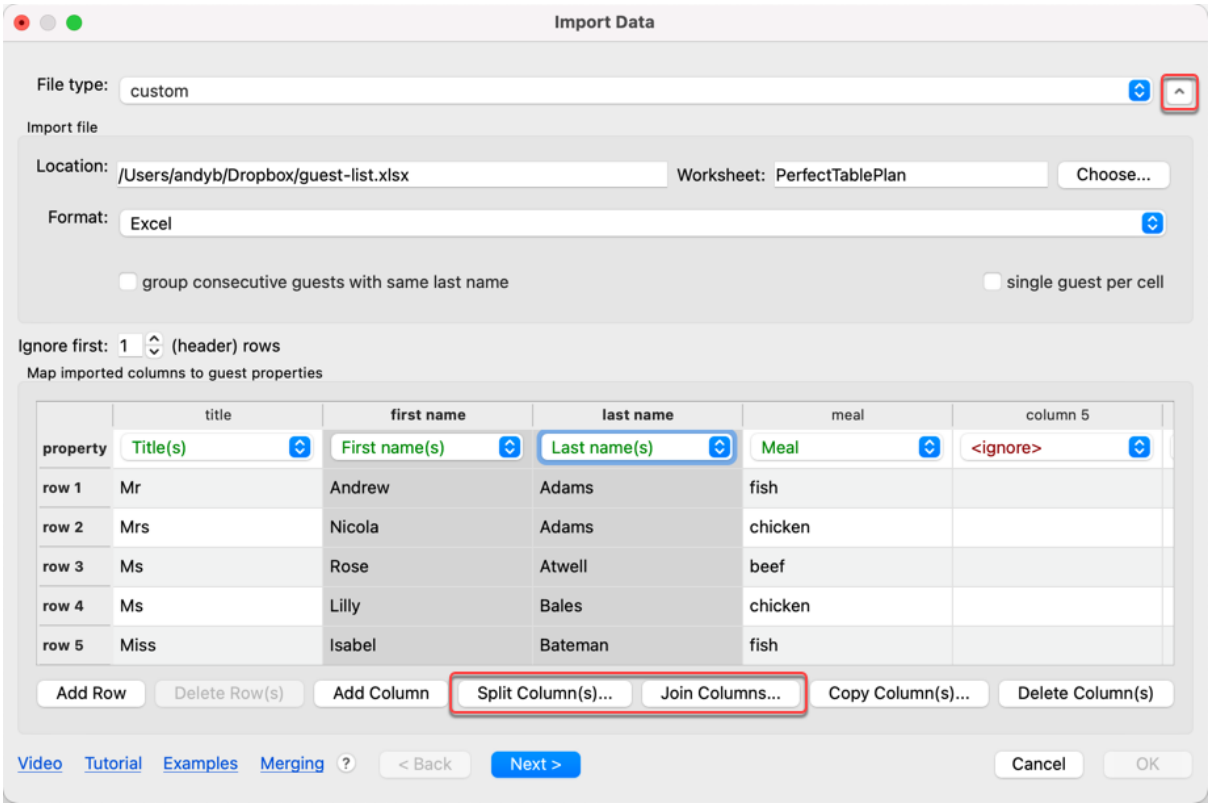
Joining and splitting columns in PerfectTablePlan

To join or split columns in PerfectTablePlan you need to import the guest list and then use the built in join and split functions. Click on the ⌄ button to reveal the buttons.

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 ⇧+*click* or ⌘+Click.

Note Join and split create new columns. They don't change existing columns.

For example, you can use the Join feature to convert names in two columns into a single column.

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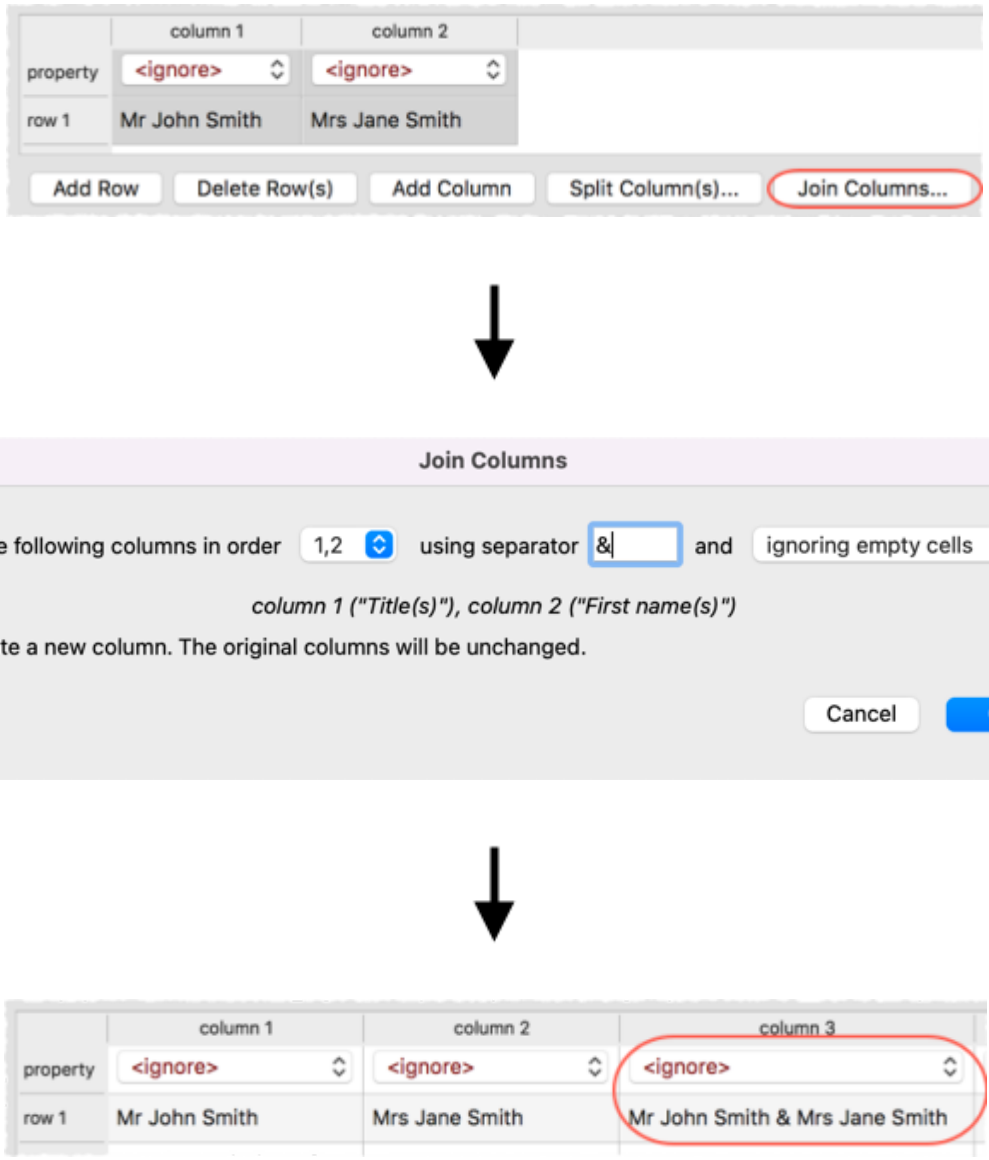

See also:

- Edit guest list data during import (video with audio, 1:16 minutes)
- Example import formats

3.8.10 Merge updates when re-importing

See Merge import.

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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, including any custom fields.

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.

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3. **File>Save**.

If a guest in the template is not attending, you can set their RSVP status to declined, rather than deleting them.

See also:

- Copy guests from one plan to another
- Find a missing plan file

3.9.3 Delete a plan

There is no way to delete a plan file from PerfectTablePlan. However a plan file is just a text file. So you can delete it using Apple Finder. If you aren't sure where the file is stored you can quickly search your harddisk using the **Find plan files** window.

3.9.4 Email my plan

To email a copy of your plan to someone with PerfectTablePlan:

1. **File>Save** your plan.
2. Compose an email in your standard email package and attach the saved plan (.tp) file.

Note If they don't need to save, print or export your plan they can download and use the free trial version of PerfectTablePlan.

To email a copy of your plan to someone without PerfectTablePlan:

1. Export your plan into the appropriate format (usually PDF).
2. Compose an email and add the exported file as an attachment.

Alternatively you can export your plan to the web and email a link.

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3.9.5 Find a missing plan file

If you are having difficulty remembering where you stored a file, you can search your harddisk using the **Find plan files** window.

Note PerfectTablePlan never deletes plan files.

See also:

- **Most Recently Accessed** window
- Backup files
- Delete a plan

3.9.6 Retrieve old versions of the plan

You may be able to access old versions of your plan from automatic backup files made by PerfectTablePlan.

See also:

- Find a missing plan file

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

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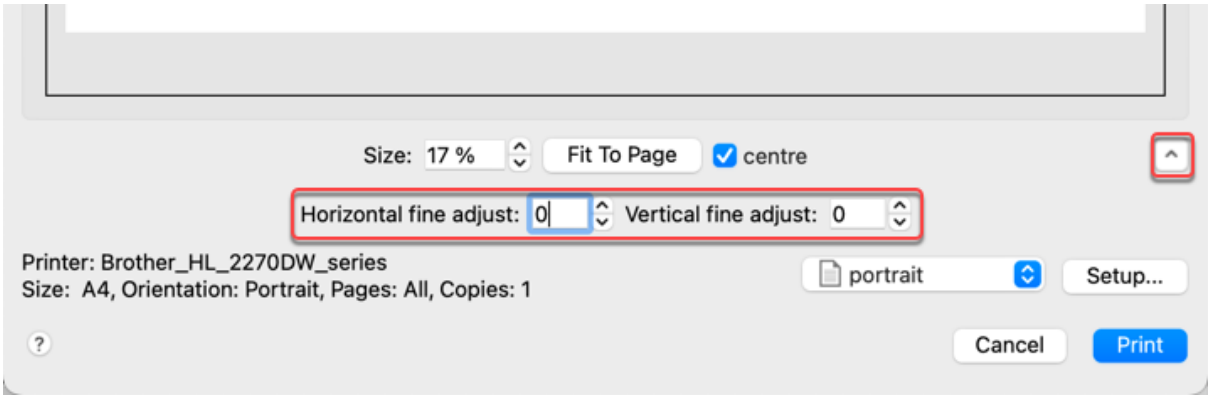
- Print legible plans on a small format printer

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 **Right** 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.

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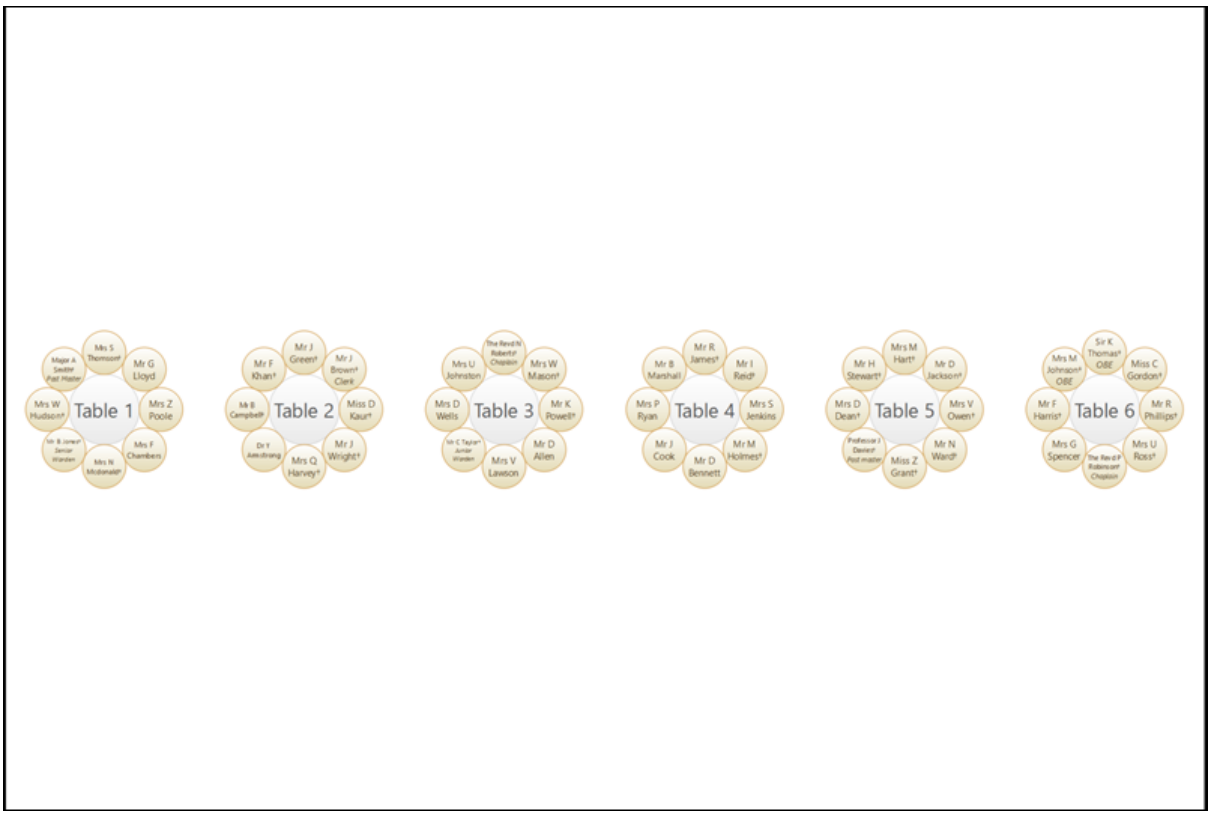
3.10.4 Print legible plans on a small format printer

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:

- Try printing in **Landscape** instead of **Portrait** mode (or vice versa) to better match the aspect ratio (height to width ratio) of the paper to the aspect ratio of your plan.

- Try to modify the layout of the tables and other items in your **Floor Plan** so the width:height ratio of the bounding box around them is approximately the same width:height ratio as the page.



A floor plan with different width:height as page means lots of unused space and smaller text on the printed page

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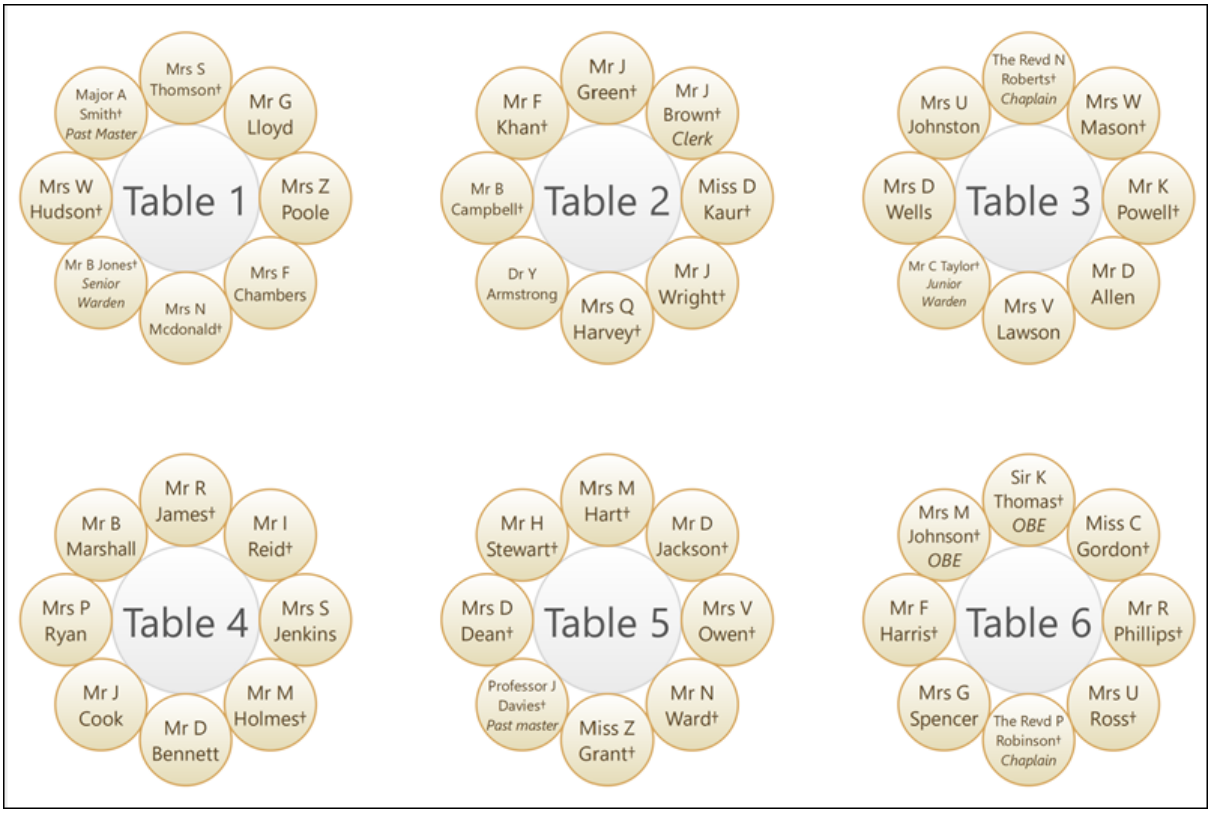

A floor plan with similar width:height as page means less unused space and bigger text on the printed page

- Minimize the amount of empty space in the **Floor Plan** pane, for example by moving the tables closer together. This may seem counter-intuitive, but will allow text to appear bigger when the floor plan is scaled to fit the page. Below you can see the same table plan output to a A4 page, with and without large spacing between the tables:

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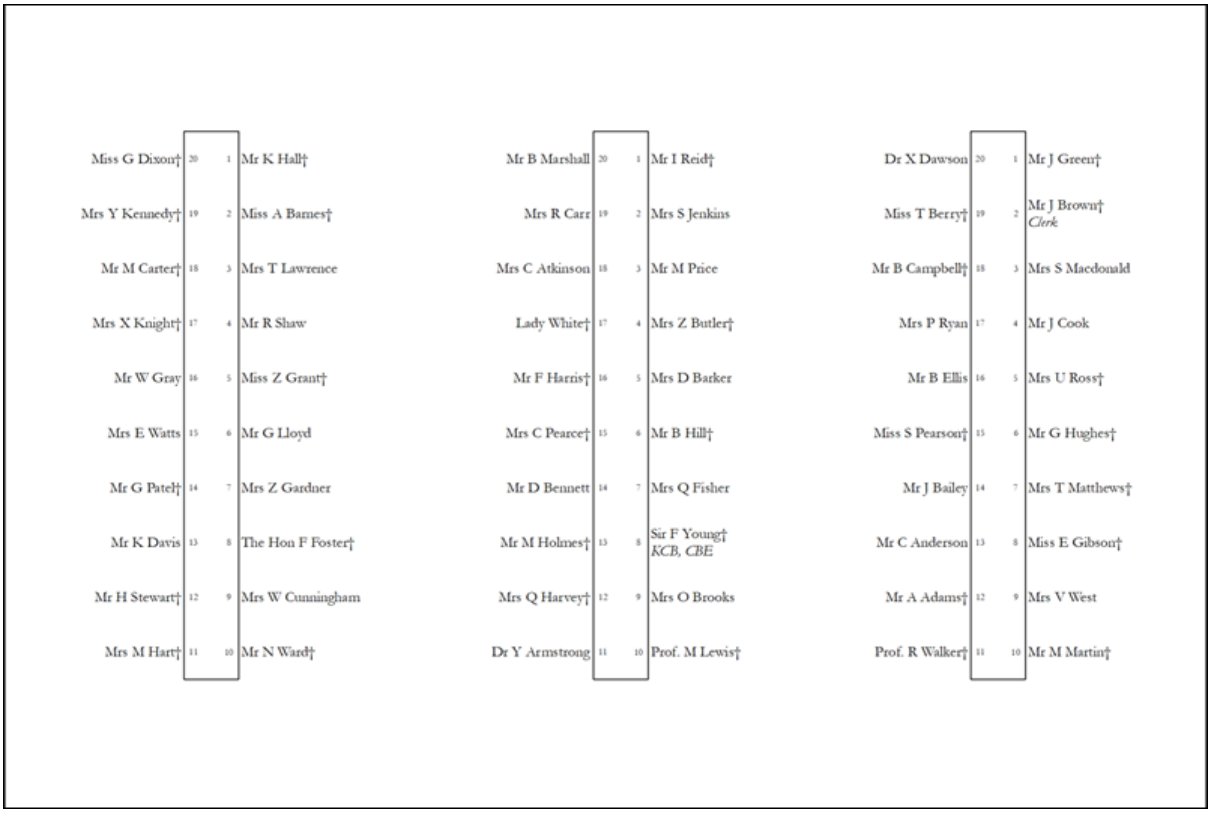

Tables spaced well apart means lots of unused space and small text on the printed page

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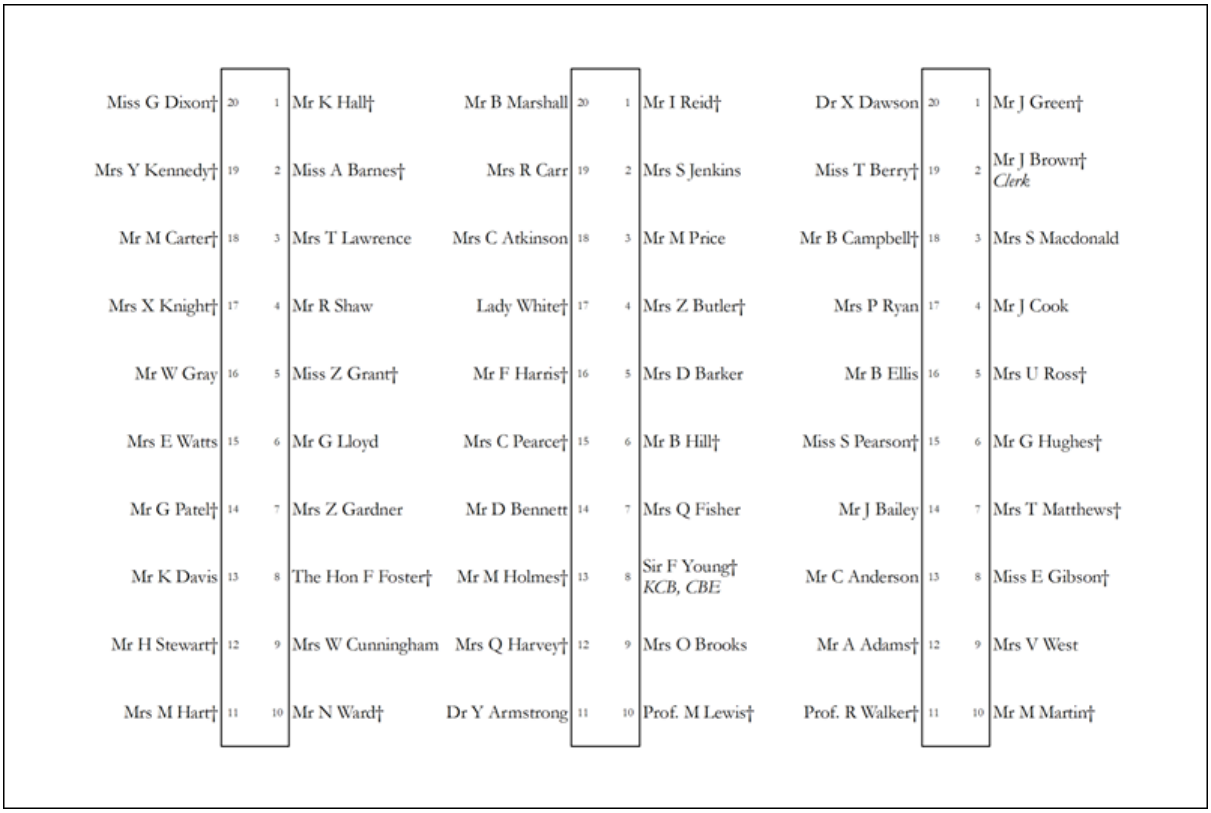

Tables spaced closer together means less unused space and larger text on the printed page

- 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.

- Shorten the names displayed in the **Floor Plan** pane, e.g. by selecting **F. Last**. from the **Display** drop-down list at the top of the pane. This will allow you to increase the font size.

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- 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. But note that the text will be shrunk to fit so that it doesn't overlap other text.

- Try a more legible font, e.g. Helvetica, Georgia or Verdana.

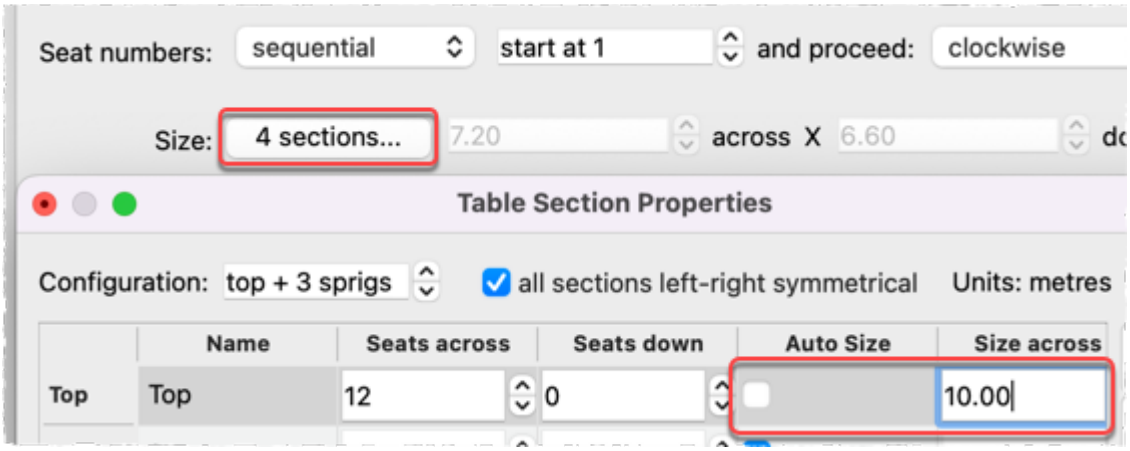
Advanced and Professional editions only

- Use an E-shaped table type instead of making an E-shaped table from individual head and custom tables (the E-shaped table is more intelligent about how much space can be given to each name).

- For E-shaped tables

  o Move longer names to the 'external' sides of (i.e. not between 2 sprigs).

  o Increase the distance between the 'legs' by making the 'top' sprig longer.



NB/ Doubling the size of the tables, seats and fonts won't help, because then PerfectTablePlan will just scale them 50% smaller to fit on the page!

Alternatively:

- Export the floor plan as a PDF and send it to someone with a larger format (e.g. A3 or A2) printer

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- 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/⌘+click/⇧+click to select the appropriate guests in the **Guests** pane.
2. Right-click.
3. Select the proximity from the pop-up menu.

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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**.

See also:

- Bulk edit proximity (video with audio, 1:08 minutes)

See also:

- Import proximity data

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

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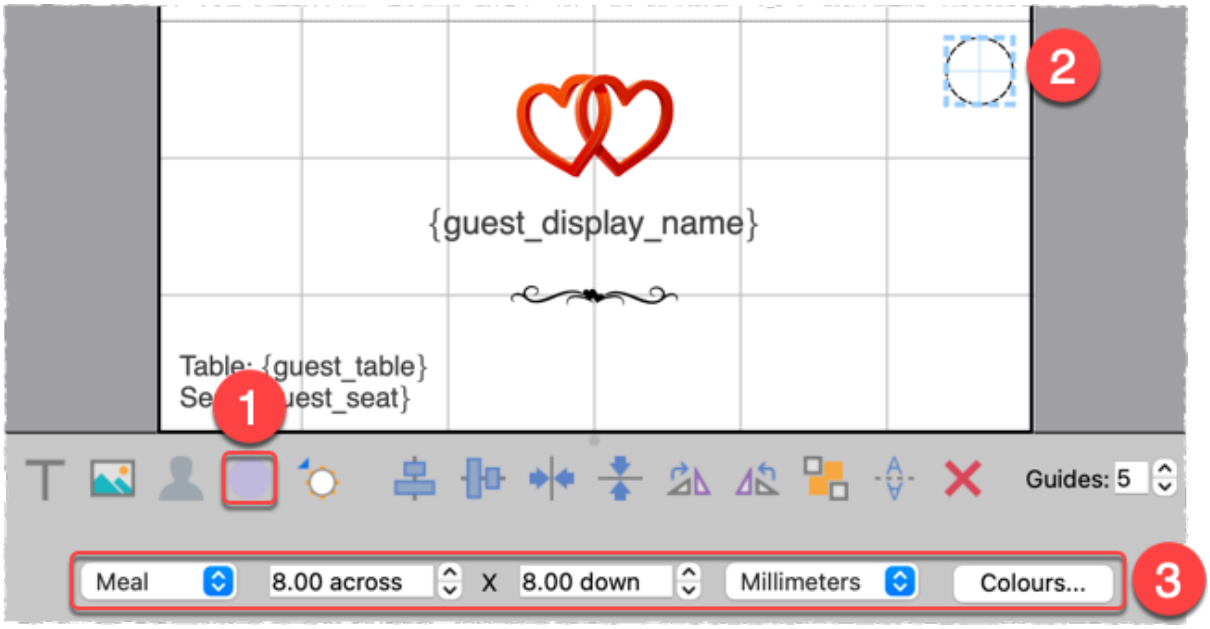
what meal has been ordered (e.g. red=beef, blue=chicken, green=vegetarian). You can also use it to discretely convey information you might not wish to put in text form, e.g. whether a guest has paid!

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.

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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**.

See also:

- Colour coded dots (video with audio, 1:39 minutes)
- Create place cards and other stationery (video with audio, 10:08 minutes)
- Print stationery tutorial
- Add a graphic/image/clipart to the stationery
- Add a guest image 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. Drag the image from Mac Finder or a web browser onto the **Design** tab of the **Stationery** pane.
3. Set the image **across** and **down** size.
4. Click or buttons to rotate the image as required.
5. Click on the **Preview** tab of the **Stationery** pane to see how the images will appear when merged.

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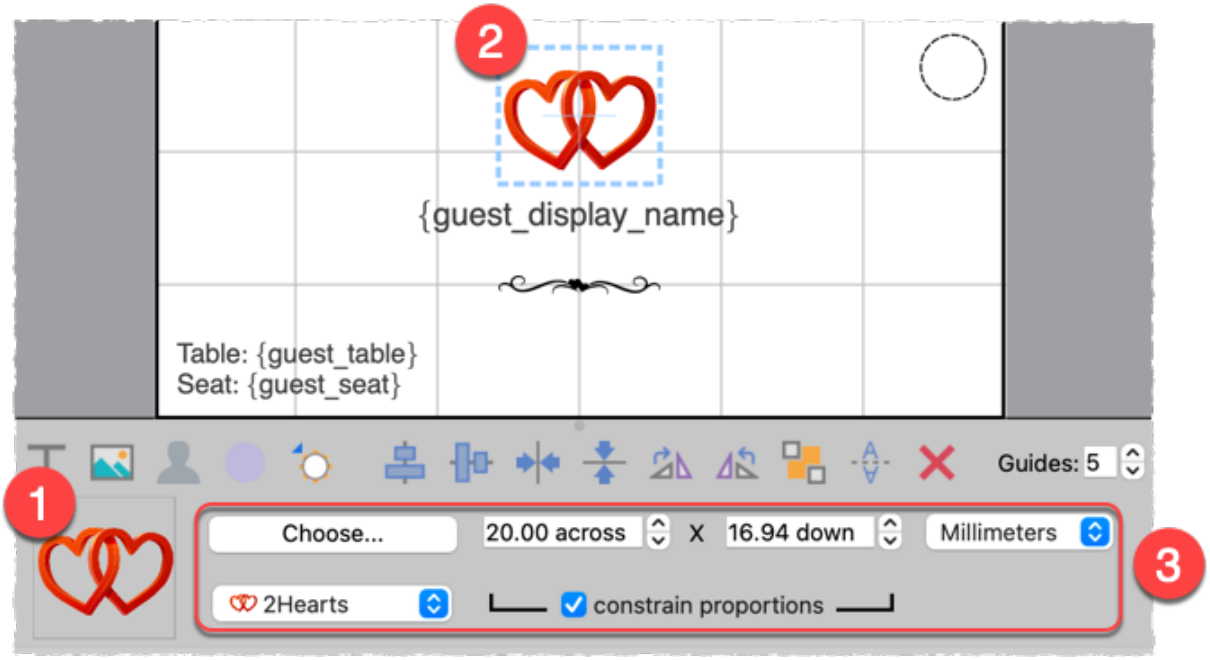
Or:

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 **Choose...** 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 or buttons 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.



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You can use the **You are here** button to insert a personalised location map into each item of stationery.

See also:

- Stationery images (video with audio, 1:39 minutes)
- Create place cards and other stationery (video with audio, 10:08 minutes)
- Find free clipart
- Load sample stationery
- Print stationery tutorial
- Add a guest image to the stationery
- 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 guest image to the stationery

To add a guest image to your stationery:

1. Ensure that the **Design** tab of the **Stationery** pane is at the front.
2. Click on the **Guest 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. Set the image size **across** and **down**.
5. Option change the image shape from **Square** to **Circular**.
6. Click on the **Preview** tab of the **Stationery** pane to see how the guest images will appear when merged.

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See also:

- Print stationery tutorial

3.12.4 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**.

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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.

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5. Click or buttons 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.

See also:

- You are here maps (video with audio, 0:49 minutes)
- Create place cards and other stationery (video with audio, 10:08 minutes)
- Print stationery tutorial
- Add a graphic/image/clipart to the stationery
- Add a guest image to the stationery
- Add a colour coded spot to the stationery
- Merge guest names into stationery

3.12.5 Add a new stationery layout

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

1. At the top of the **Stationery pane** click the **Stationery layout** button. The **Stationery Layout** window will appear.

2. Set the various fields to the appropriate dimensions. You can choose **mm** or **inches**. Click on the **Nomenclature** tab for a visual representation of the various parameters. The layout is shown in the **Preview** tab.

3. Click **OK**. The **Save Stationery Layout** window will appear.

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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:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Load sample stationery
- Show one stationery item per couple/family/group

3.12.6 Align printing with my stationery

If the printing doesn't align correctly with your stationery there are a number of possible causes:

- The stationery template dimensions don't match the stationery. Verify the measurement against the stationery (including the units) and correct the stationery template if required.
- The paper size set for your printer is incorrect.
- Your printer positioning is incorrectly calibrated. Most printers have a built-in calibration function that can fix this. Try Googling: `<your printer model> calibration`.
- The printer scaling property is not set to 100%.

To access your printer properties:

1. Select **File>Print** in PerfectTablePlan.
2. Click on the **Setup...** button in the **Print** window.
3. Select the printer (if more than one).

If none of the above works, try using the fine adjust controls or change the scaling property for your printer to compensate for the inaccuracy.

Even the best set-up printer is unlikely be millimetre perfect and most printers can't print right to the edge of the page. So we recommend that you:

- Don't position text or graphics close to the edge of a card.

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- Don't print borders or fold lines or pre-scored stationery (e.g. Avery place cards).

- Don't try to print within a 5-10 mm margin around the edge of the page.

You can also try exporting the stationery to PDF format and printing from Adobe Acrobat (or similar). Note that Adobe Acrobat has a scaling property that may not be set to 100% by default.

See also:

- Print stationery on blank sheets

- Print stationery on press-out sheets

3.12.7 Create address labels

If you have completed the contact information for each group you can print address labels from the **Stationery** pane.

We include A4 and Letter address label templates with PerfectTablePlan, which you can load.

Or you can create your own design.

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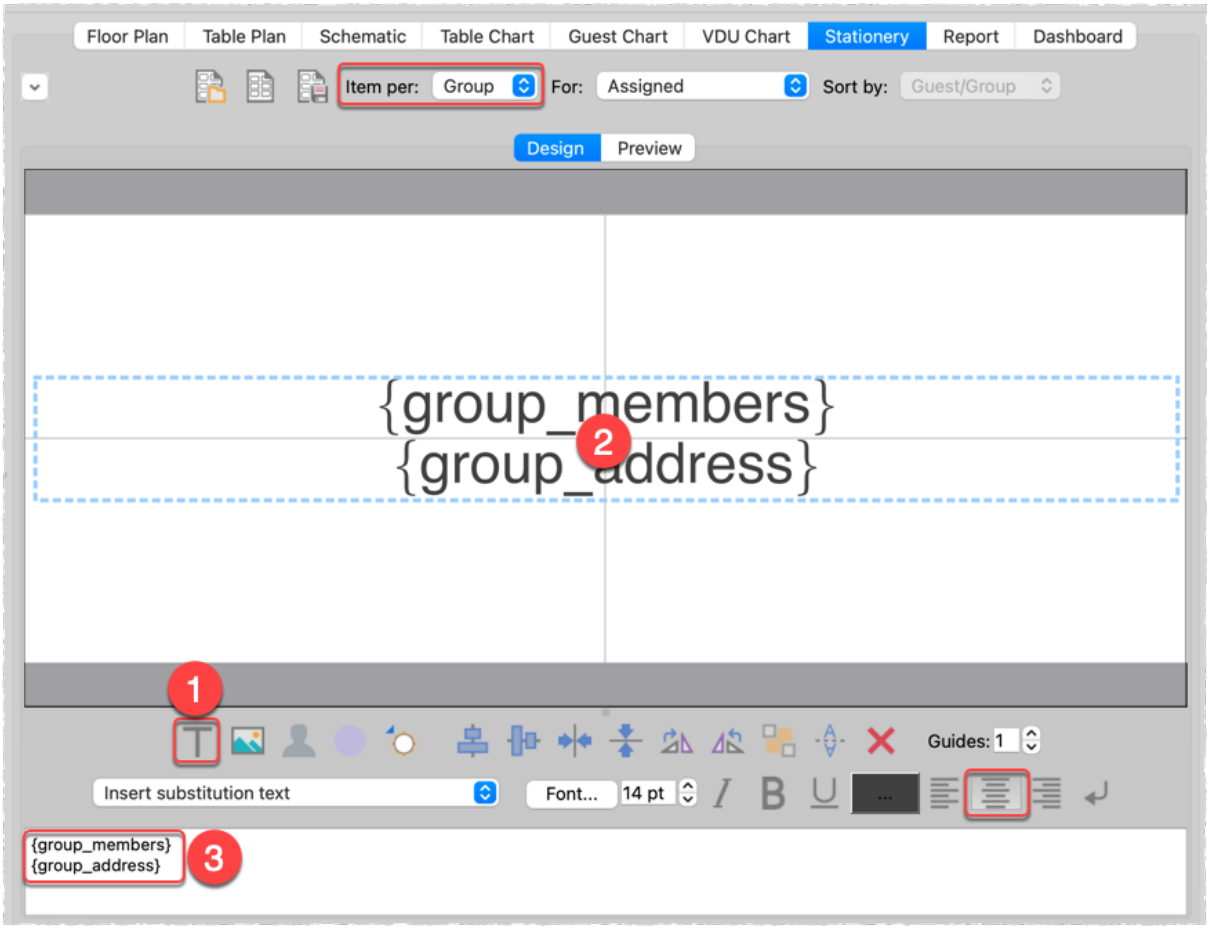

See also:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Load sample stationery
- Print stationery tutorial
- Merge guest names into stationery
- Show one stationery item per couple
- Change the order of guests in a group

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3.12.8 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:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Add a new stationery layout
- Remove a stationery border or fold line

3.12.9 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 place the merged text.
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.

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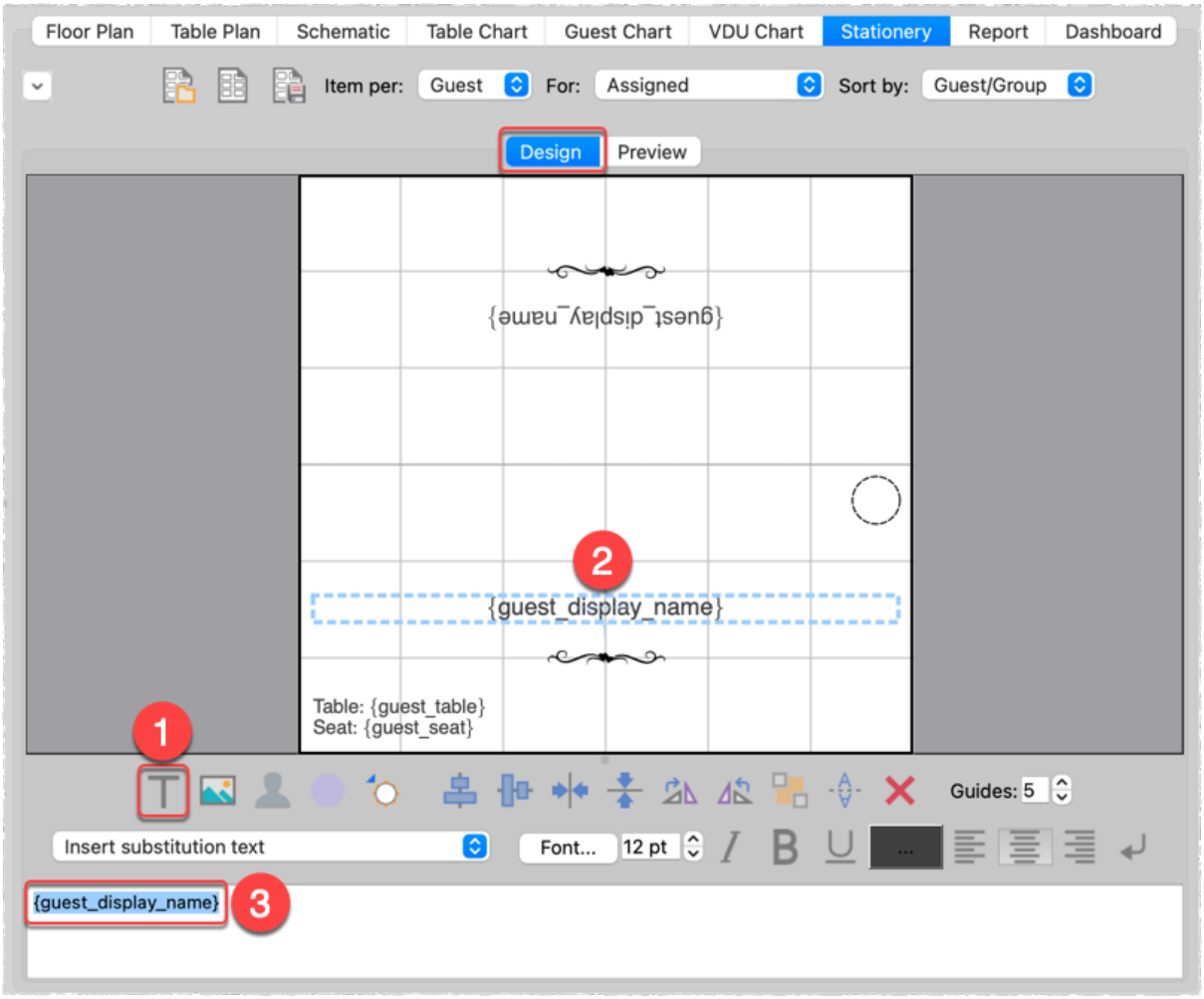

See also:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Load sample stationery
- Print stationery tutorial
- Order place cards
- Add a graphic/image/clipart to the stationery
- Add a guest image to the stationery
- Add a colour coded spot to the stationery

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- Add a personalised map to the stationery
- Show one stationery item per couple/family/group

3.12.10 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

3.12.11 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:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Merge guest names into stationery
- Order place cards
- Printing stationery

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- Create address labels
- Show one stationery item per couple/family/group
- Change the order of guests in a group

3.12.12 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**.

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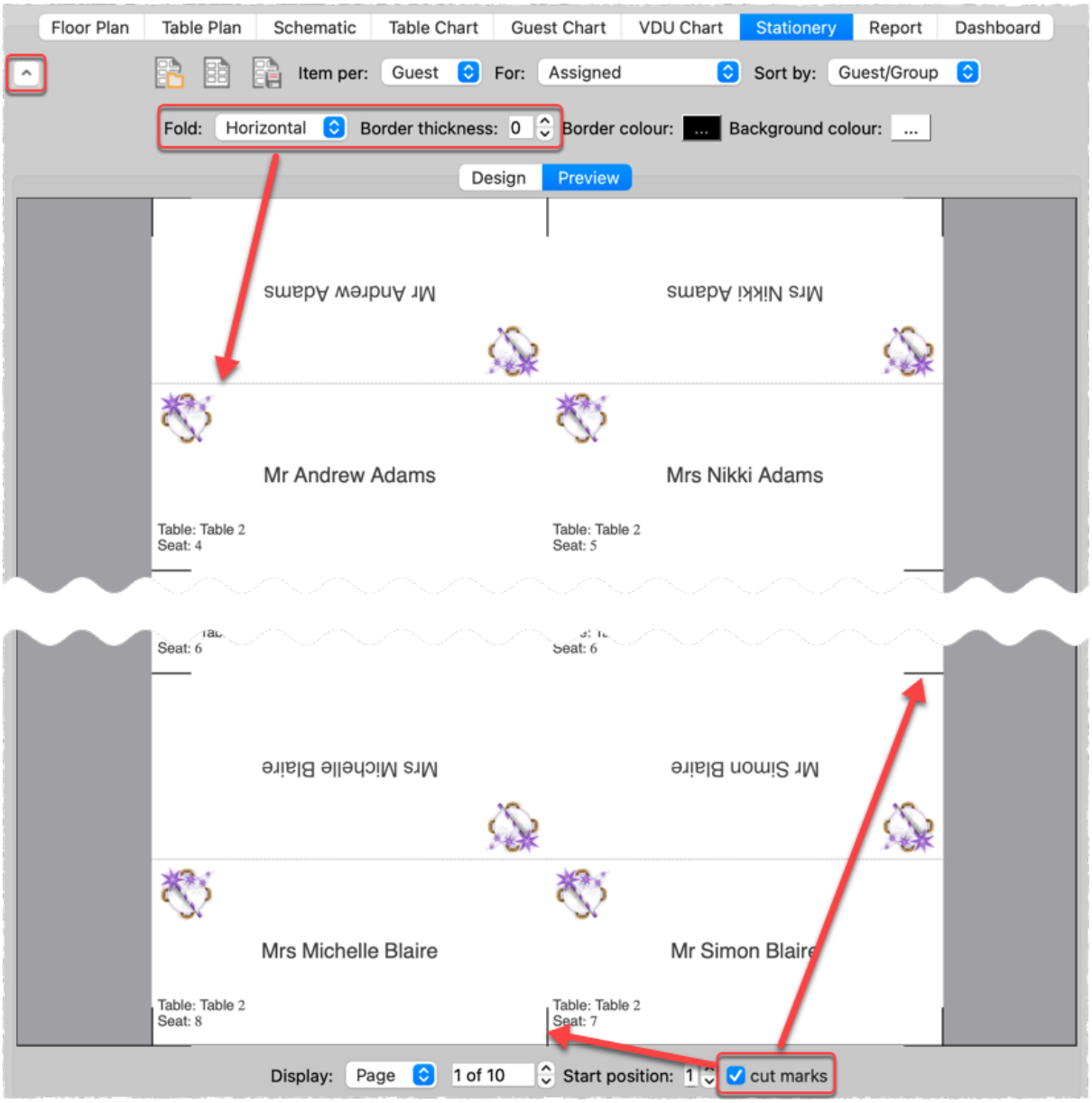

See also:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- 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

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3.12.13 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**.

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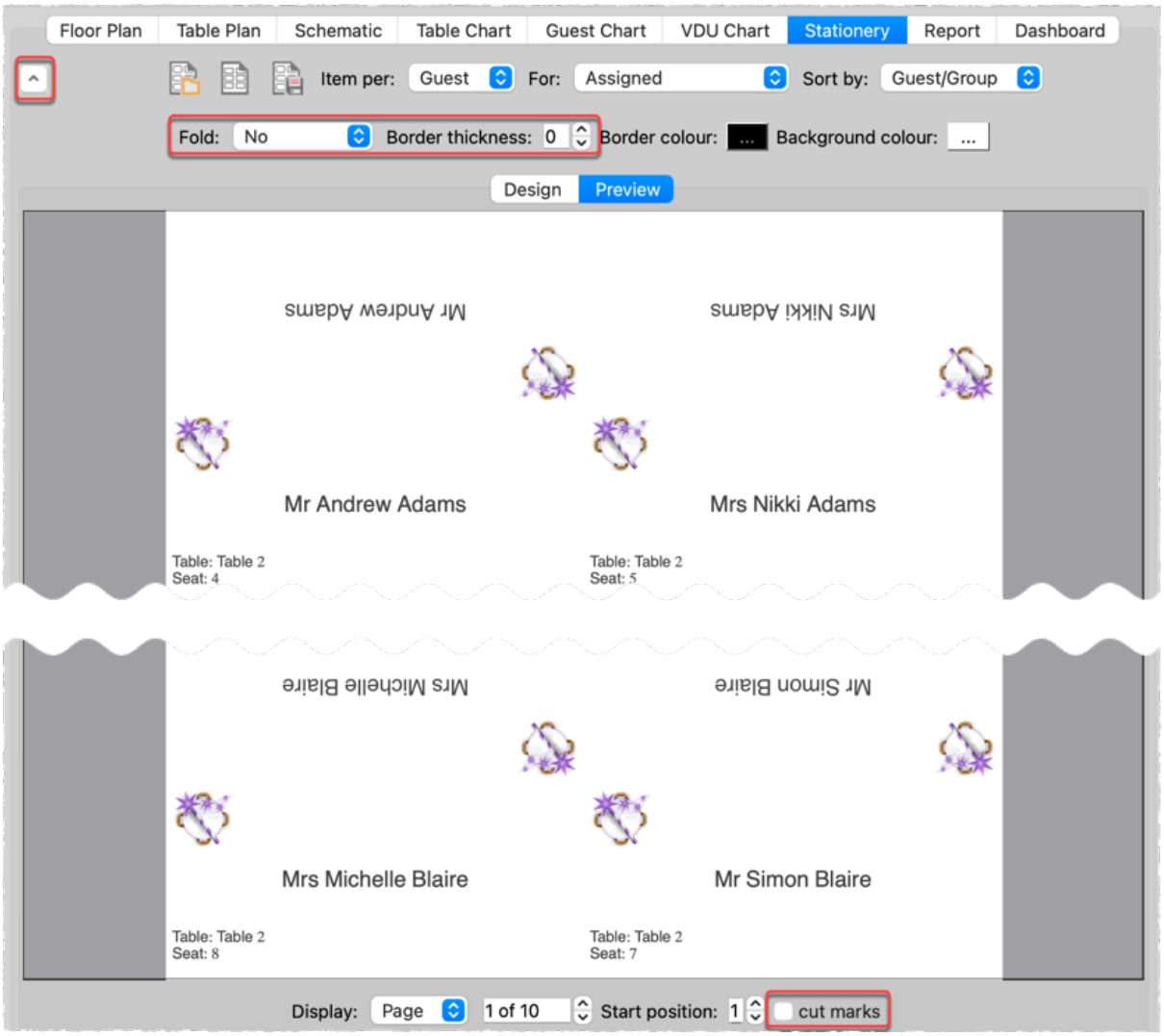

See also:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- 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

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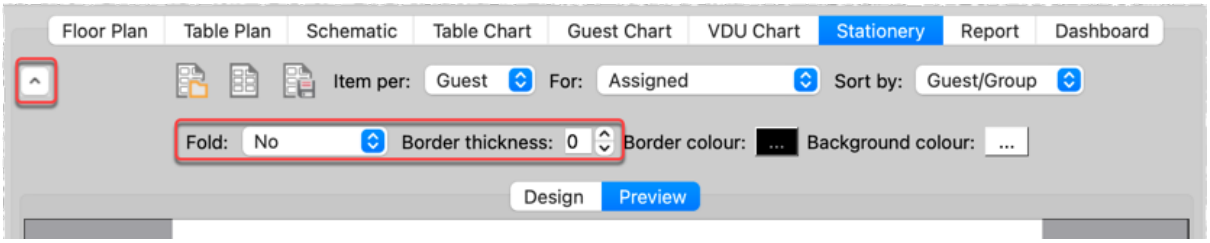
3.12.14 Remove a stationery border or foldline

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**.

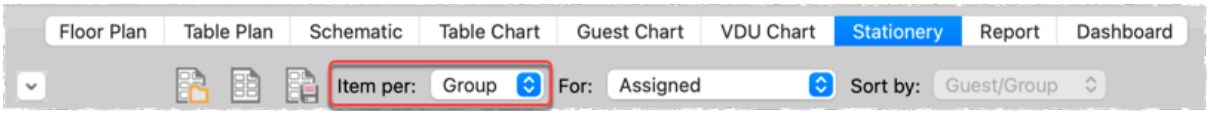


See also:

- Create place cards and other stationery (video with audio, 10:08 minutes)

3.12.15 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.

See also:

- Create place cards and other stationery (video with audio, 10:08 minutes)
- Move guests from one group to another

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3.13 Tables

3.13.1 Add/remove a single seat to/from a table

Right-click on a seat and select **Add Seat** or **Delete**. If you add a seat it will be added clockwise from the selected seat.

To add/remove single seats from a rectangular or banquet table you can also double-click on the table and change 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
- Hide empty seats

3.13.2 Change table size or shape

To change the size (dimension or number of seats) or shape of a single 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**.

To change the size of multiple tables:

1. Select the tables you wish to change in the **Floor Plan** or **Schematic** pane.
2. Select **Edit>Tables Properties>Size...** .
3. Change the size in the **Edit Table Size** window.
4. Click **OK**.

Note All tables must be the same shape.

To change the shape of multiple tables:

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1. Select the tables you wish to change in the **Floor Plan** or **Schematic** pane.

2. Select the shape in the **Edit>Tables Properties>Shape** menu.

See also:

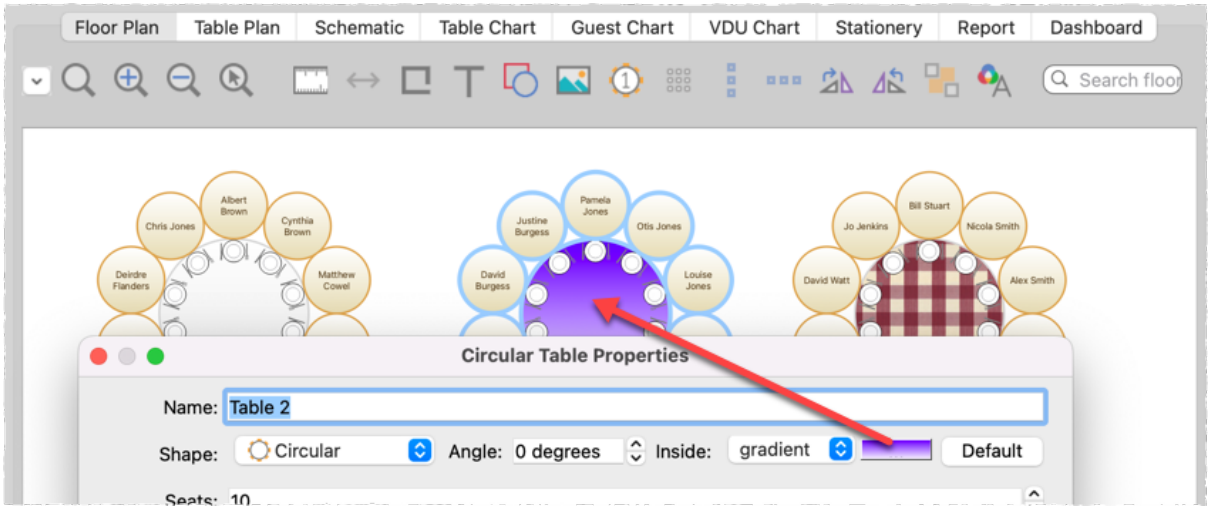
- Add/remove a single seat to/from a table

- Change table colour

3.13.3 Change table colour

To set the default colours for tables in the **Floor Plan** or **Table Plan** panes click on the **Colours and fonts** button at the top of the pane.

You can also set each table to have a different solid colour, gradient or texture different to the default colour. This can improve the aesthetics and allow you to easily identify different table types in your floor plan.



To change the colour of a single table:

1. Double-click on a table or row of seats to show the **Table properties** window.

2. Choose **solid**, **gradient** or **texture** from the drop-down list and set the appropriate colour or texture.

3. Click **OK**.

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To change the colour of multiple tables:

1. Select the tables you wish to change in the **Floor Plan** or **Schematic** pane.
2. Select **Edit>Tables Properties>Colour…** .
3. Change the colour in the **Edit Table Colour** window.
4. Click **OK**.

To change the colour of multiple tables:

1. Select the tables you wish to change.
2. Select **Edit>Table Property>Colour…** .
3. Choose **solid**, **gradient** or **texture** from the drop-down list and set the appropriate colour or texture.
4. Click **OK**.

See also:

- Set transparent as colour

3.13.4 Change the seat numbering

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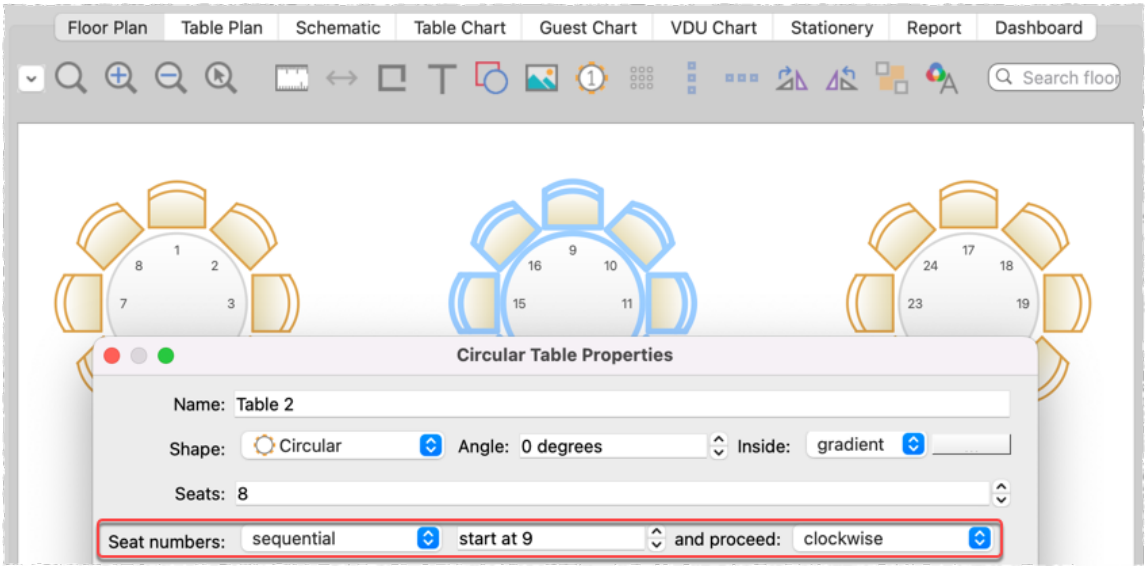

To change the seat numbering:

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).

See also:

- Flexible seat numbering (video with audio, 0:51 minutes)

See also:

- Show seat numbering

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3.13.5 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

3.13.6 Create a horseshoe shaped table

You can create a horseshoe table (and other complex table types) by composing it from basic table shapes. Typically you will use a serpentine 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.

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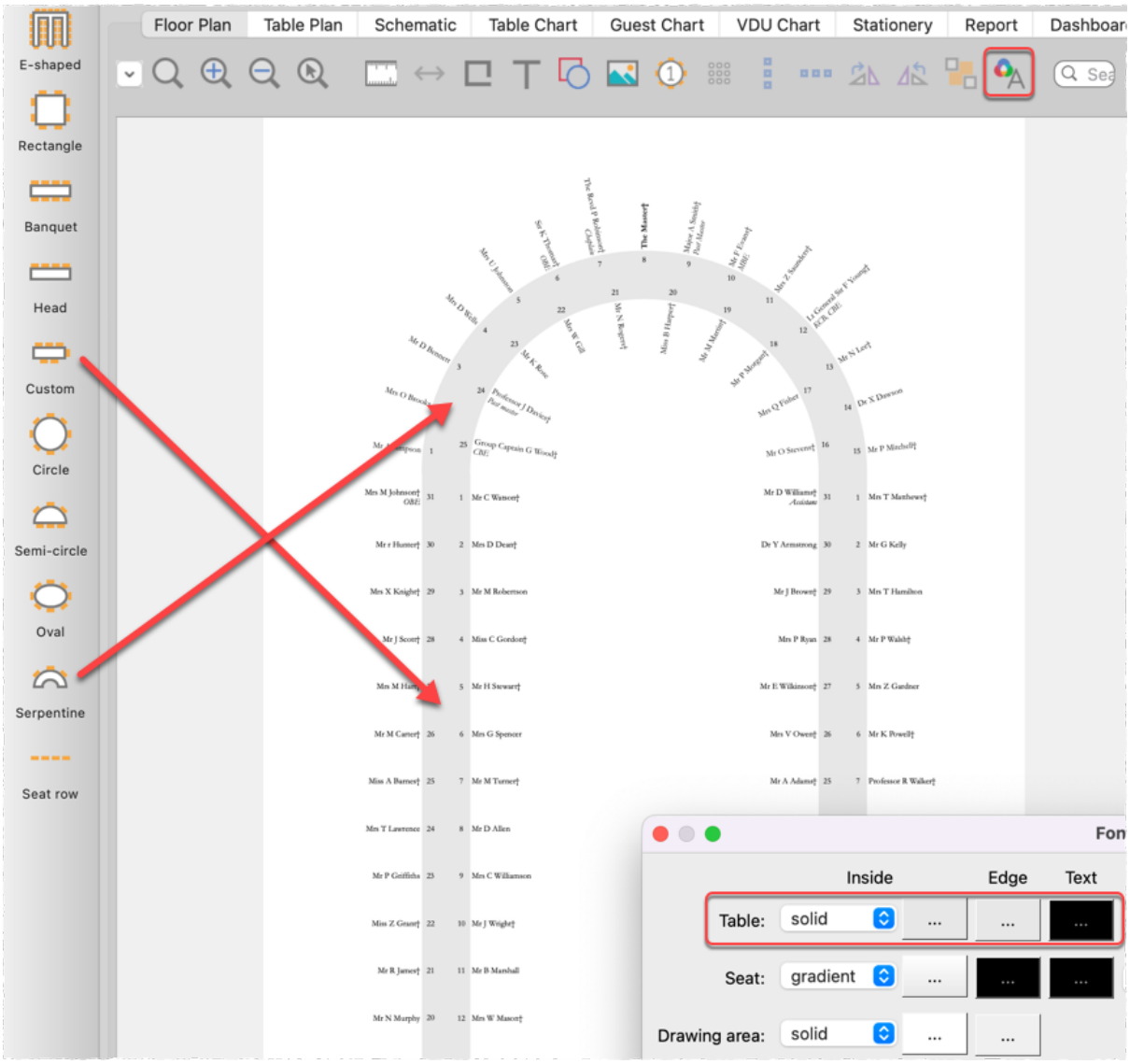

See the sample horseshoe table plan shipped with PerfectTablePlan for an example. The samples are usually installed into `Documents\PerfectTablePlan`.

Hints:

- Set the **Inside** and **Edge** colours of the tables the same in the **Fonts and Colours** window so that you won't see where the tables overlap.
- Turn the grid snap off.
- Use the keyboard arrow keys to make small adjustments to the positions of selected tables.

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See also:

- Create an E-shaped table
- Hide empty seats

3.13.7 Create an E-shaped table

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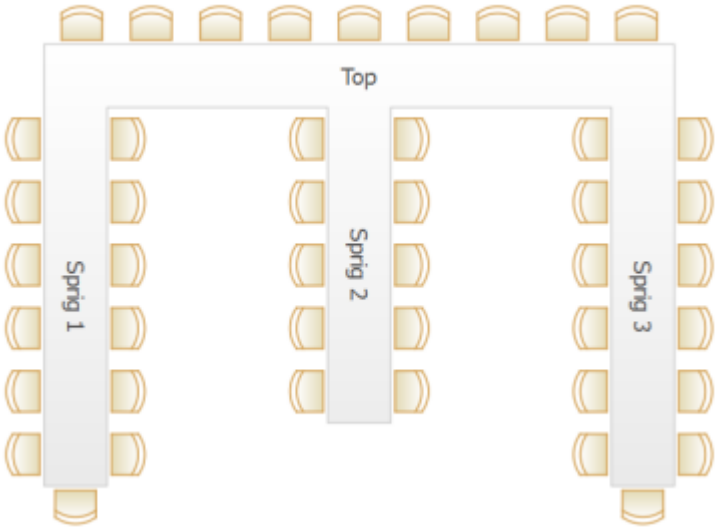
You can add an E-shaped table by selecting **Insert>E-shaped Table...** .



See also:

- 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.

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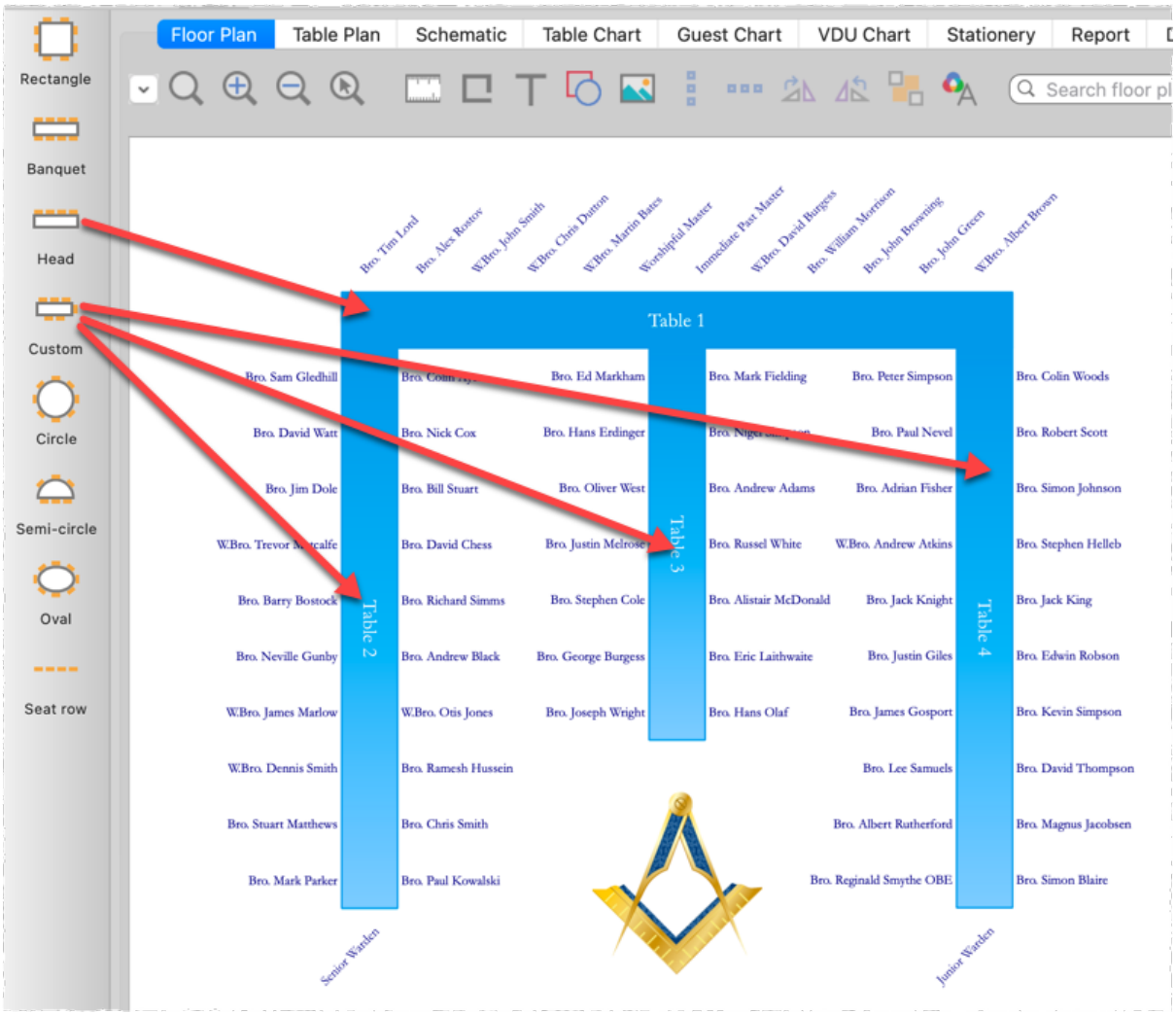

Hints:

- Set the **Inside** and **Edge** 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.
- Turn the grid snap off.
- Use the keyboard arrow keys to make small adjustments to the positions of selected tables.

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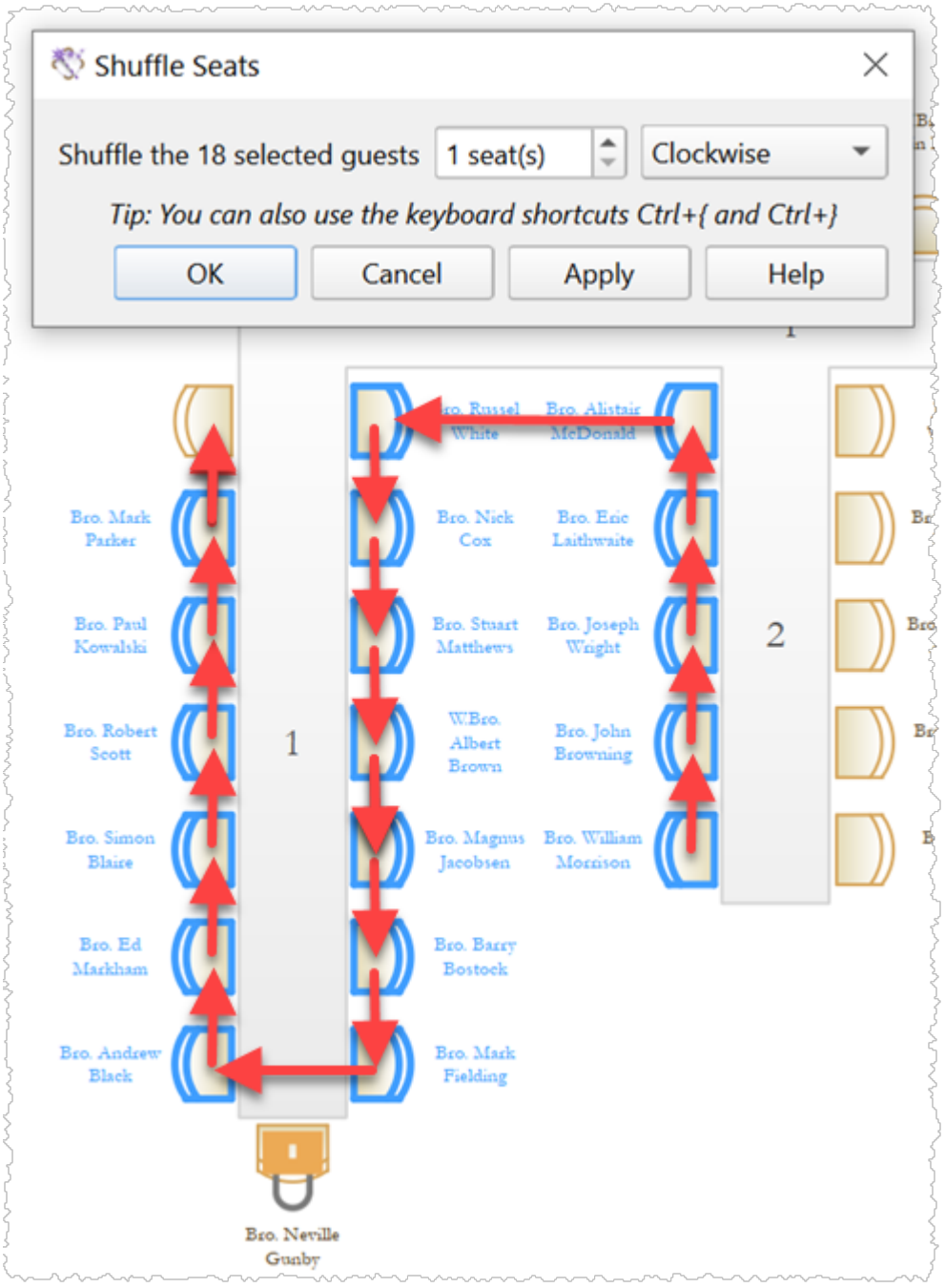
- Use the **Shuffle Seats** window to move blocks of seated guests around the table, e.g. after changing the table size.



See also:

- E-shaped table

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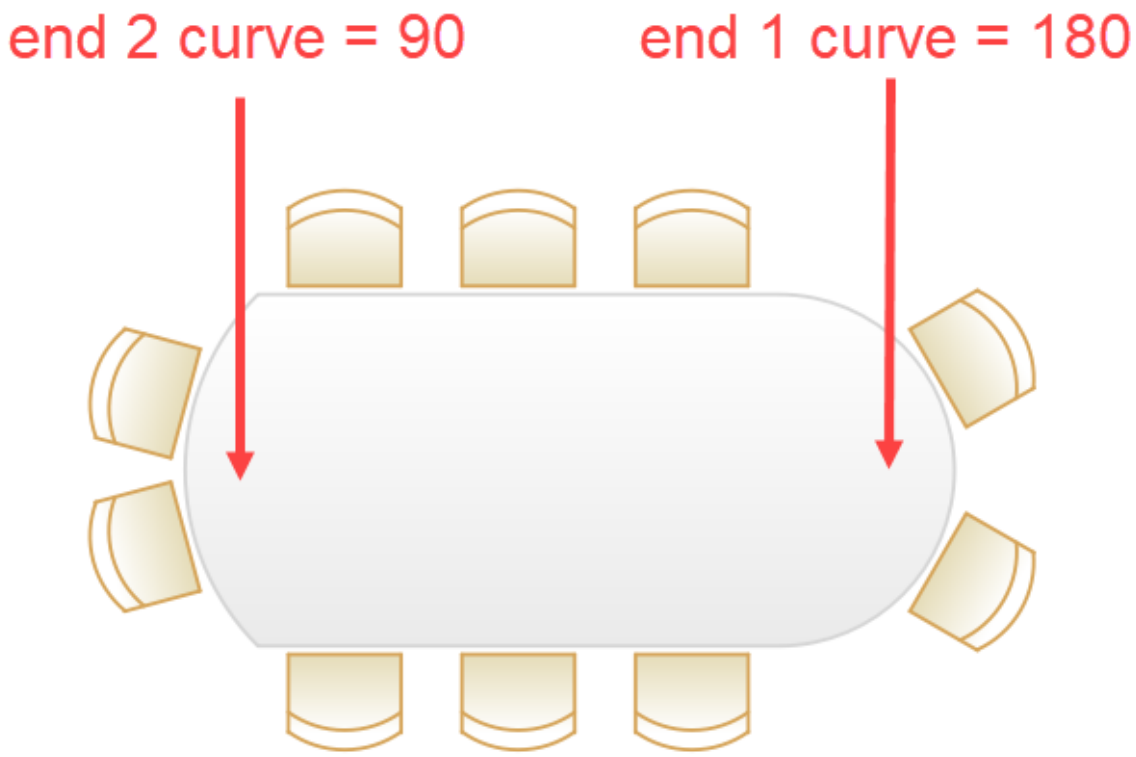
- Create a horseshoe shaped table

3.13.8 Create a round ended table

You can create a round ended table by adding a custom table and setting **End 1 curve** and **End 2 curve** to the appropriate degree of curvature (0=no curvature, 180=maximum curvature).



See also:

- Custom table

3.13.9 Create a serpentine table

Advanced and Professional editions only

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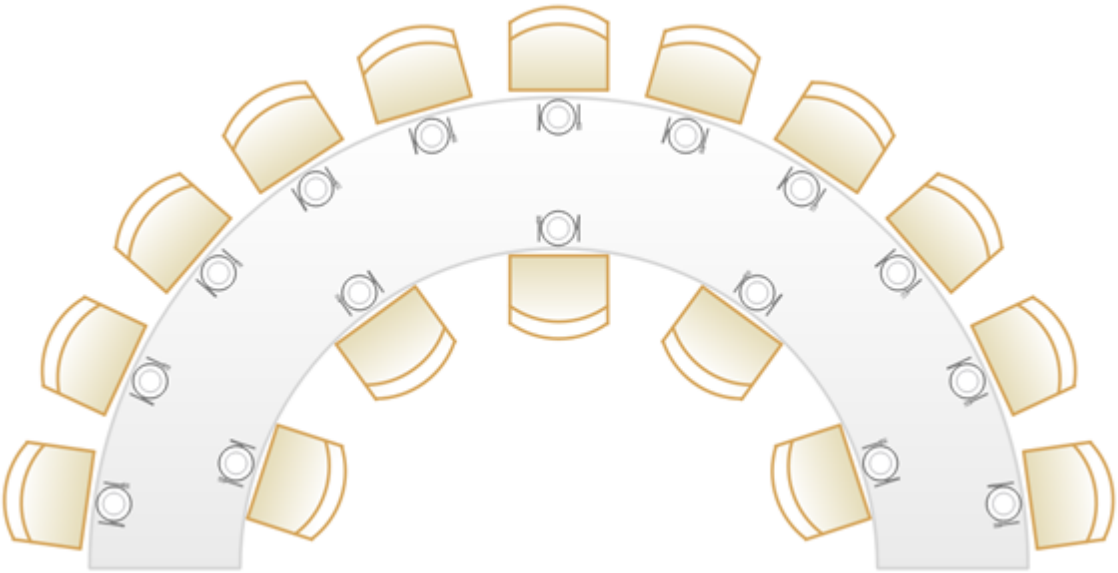
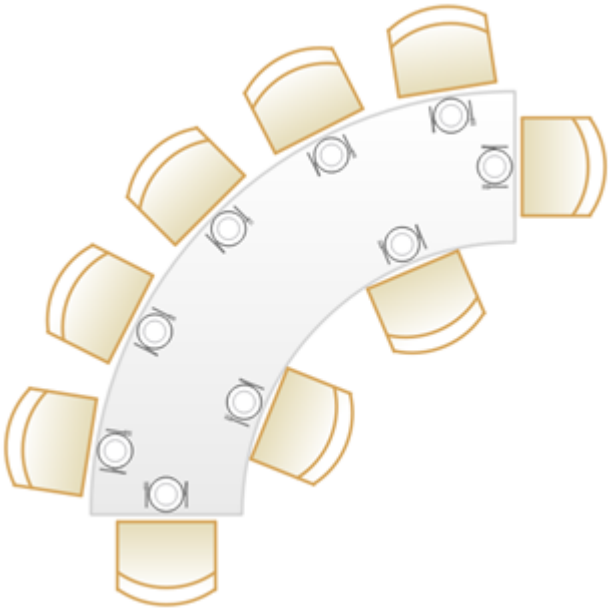
You can add 180 or 90 degree serpentine tables by selecting **Insert>Serpentine Table...** or **Insert>Half Serpentine Table...**. You can set the number of seats separately on each of the 4 sides.





You can join 2 serpentine tables together to make an S-shaped table. You may need to turn the grid-snap off to align them.

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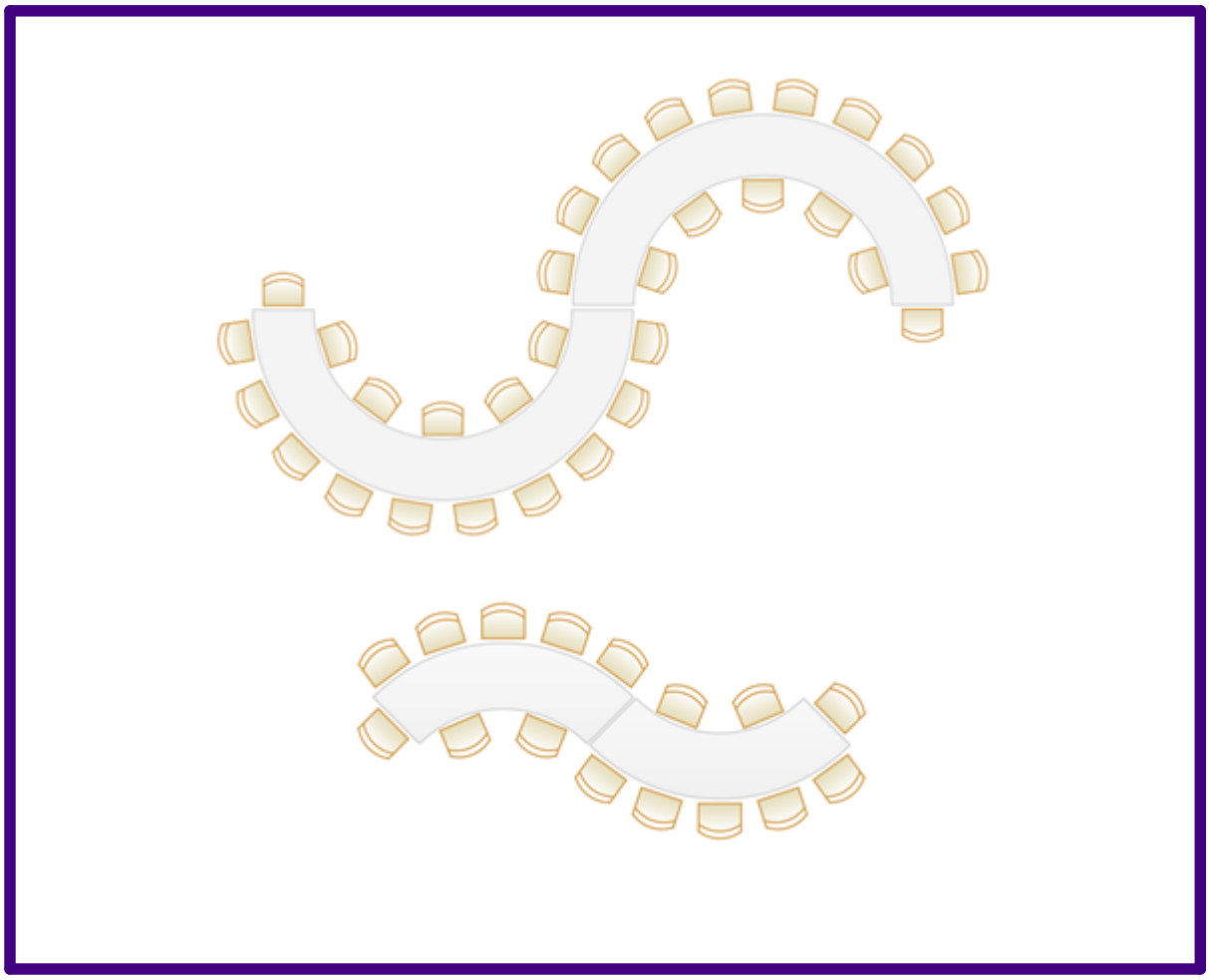

See also:

- Serpentine table
- Half Serpentine table
- Create a horseshoe shaped table
- Hide empty seats

3.13.10 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.

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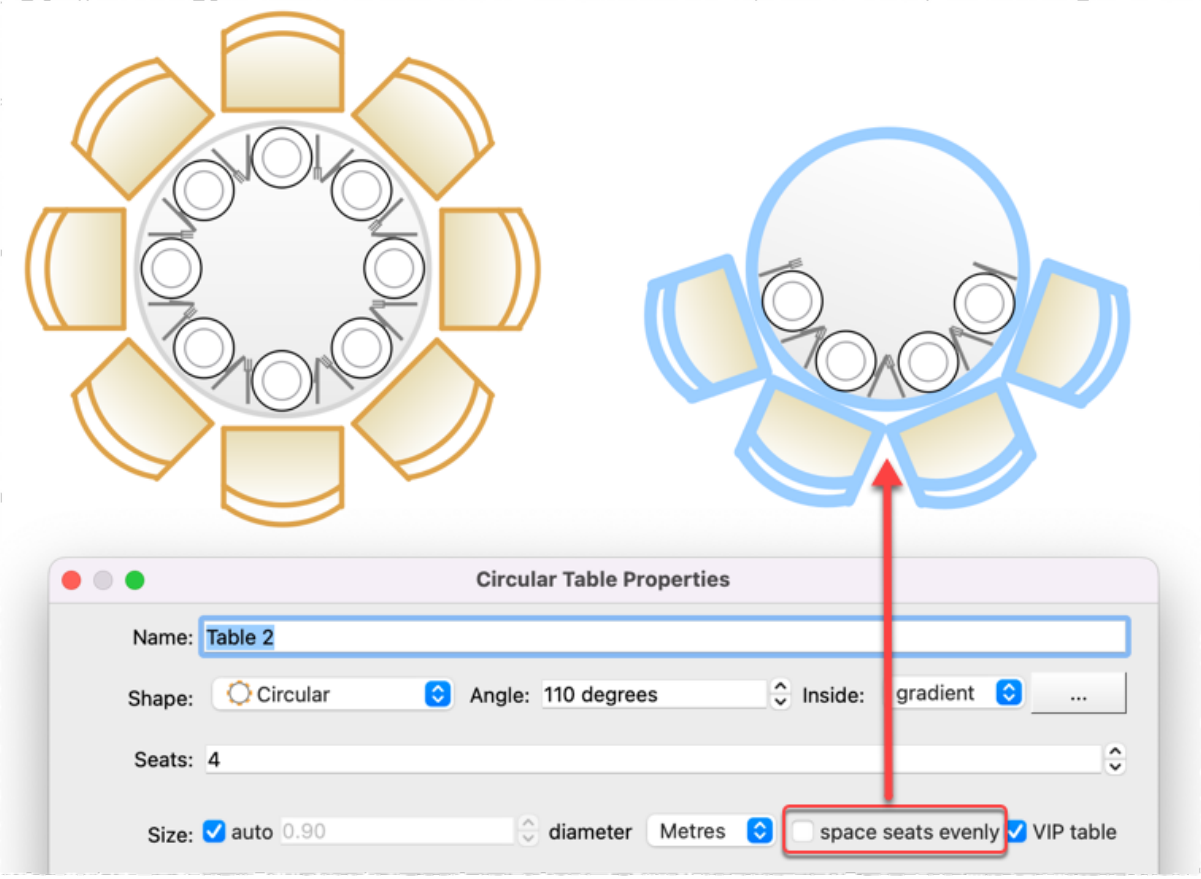
- For a rectangular table with seats on 1 side use a head table.

See also:

- Create an E-shaped table
- Hide empty seats

3.13.11 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).



See also:

- Circle table

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- Hide empty seats

3.13.12 Edit a property for multiple tables

To change the shape, colour, number of seats or size for multiple tables in a single operation:

1. Select multiple tables in the **Floor plan** or **Schematic** panes using ⌘+click/⇧+click (⌘+*A* to select all). In the floor plan you can also drag a selection box.

2. Select **Edit>Table Property** and then choose the appropriate table property to edit.

Note All the selected tables must be the same shape to edit the seats or size in this way.

See also:

- Select multiple items

- Edit a property for multiple guests

3.13.13 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 ⌘+clicking the sponsor and the groups in the **Groups** pane. Set them to have proximity 'near to' using **Edit>Proximity**.

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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:

- Assign table captains
- Organize guests by company/organization
- Show custom fields
- Assign seating by guest type/category
- Lock guests to seats

3.13.14 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**.

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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. Use the **Replace Text** window, with **Tables>Name** checked.

Or

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.

See also:

- Fast table renumber (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.

See also:

- Change the seat numbering

3.13.15 Rotate tables

To rotate one or more tables:

1. Select the table(s) in the **Floor Plan** pane.

2. Select **Edit>Properties** from the menu bar.

3. Edit the **Angle** field.

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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 rotate the selected table(s) 45 degrees clockwise or anti-clockwise click on the or buttons at the top of the **Floor Plan** pane.

See also:

- **Shuffle Seats** window

3.13.16 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 **Display** 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.

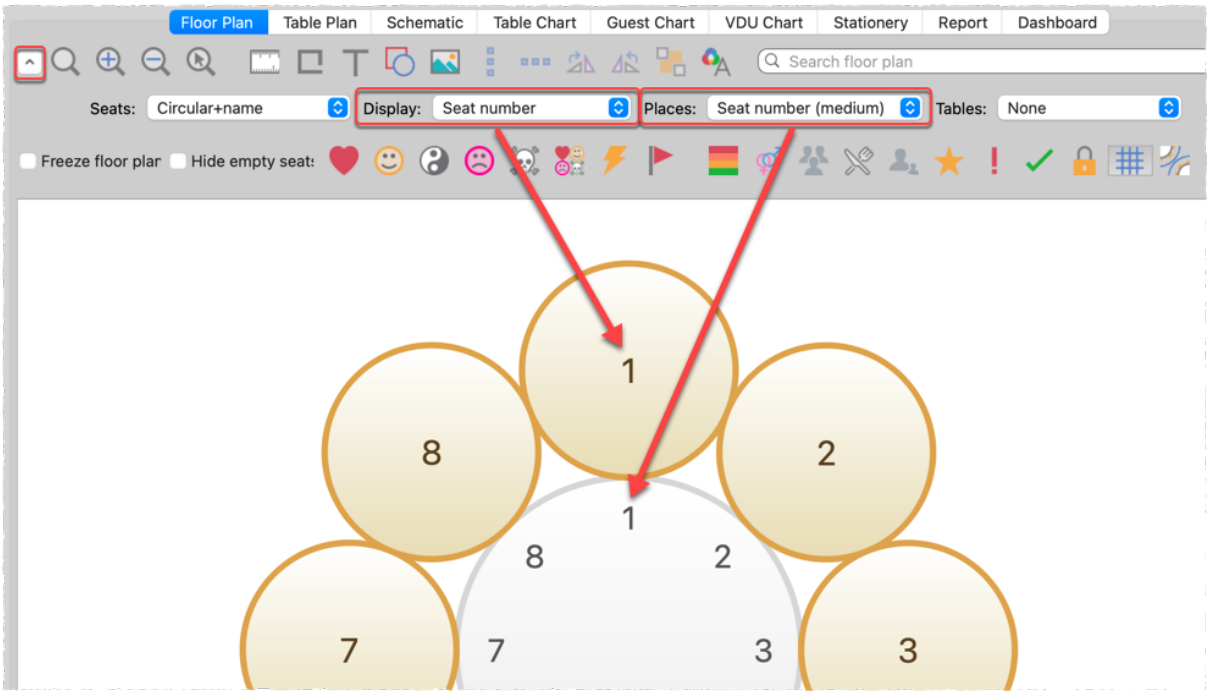

Table plan pane

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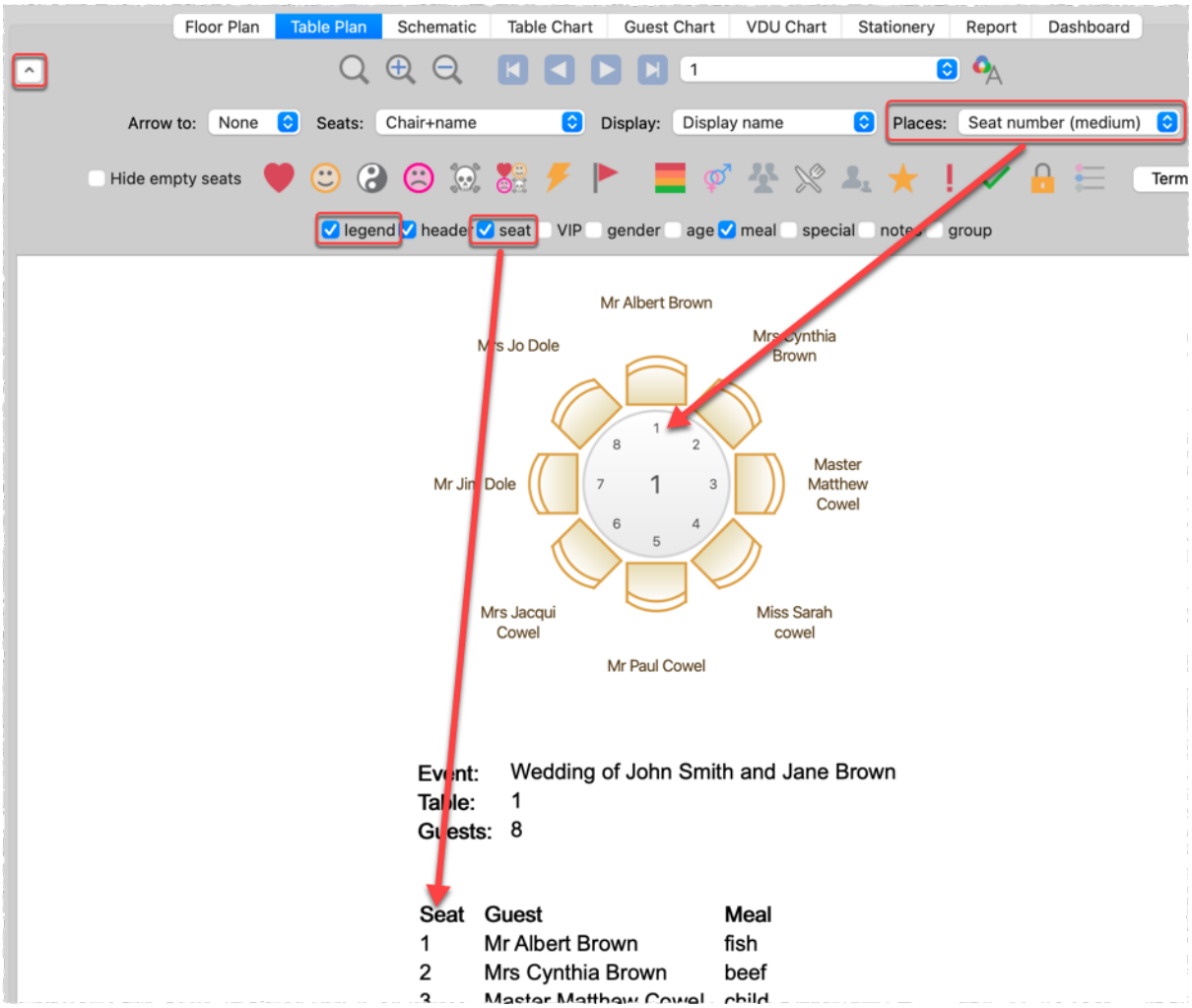
As per the **Floor plan** pane, above, but you can also show seat numbers in the legend by checking the **seat** check box.



Guest chart pane

You can show seat numbers by checking the **seat** check box.

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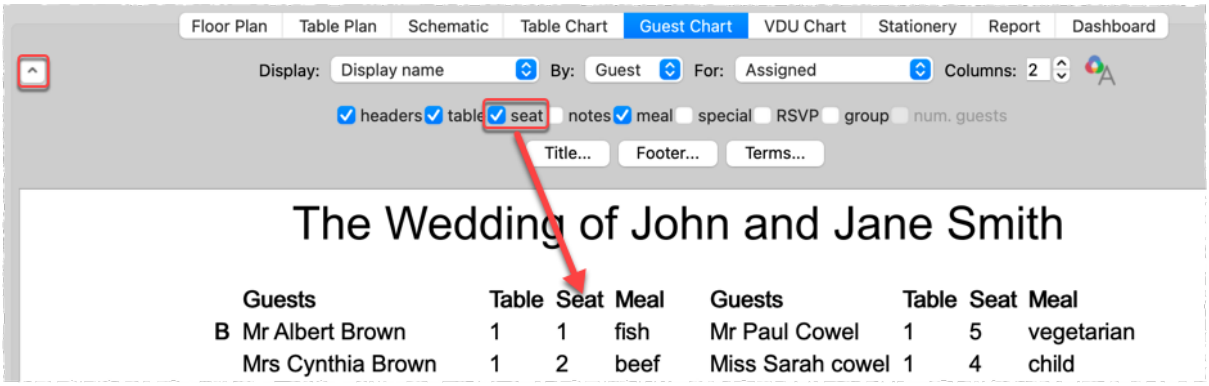

Stationery pane

You can show seat numbers by using the `{guest_seat}` substitution text.

See also:

- Change the 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).

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.

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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
- Change table colour
- Set transparent as colour

3.14.3 Change the dashboard charts displayed

To change the charts shown in the **Dashboard** pane:

- Click on the button at the top left of the pane to show additional options.
- Check the charts you want displayed.

3.14.4 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.

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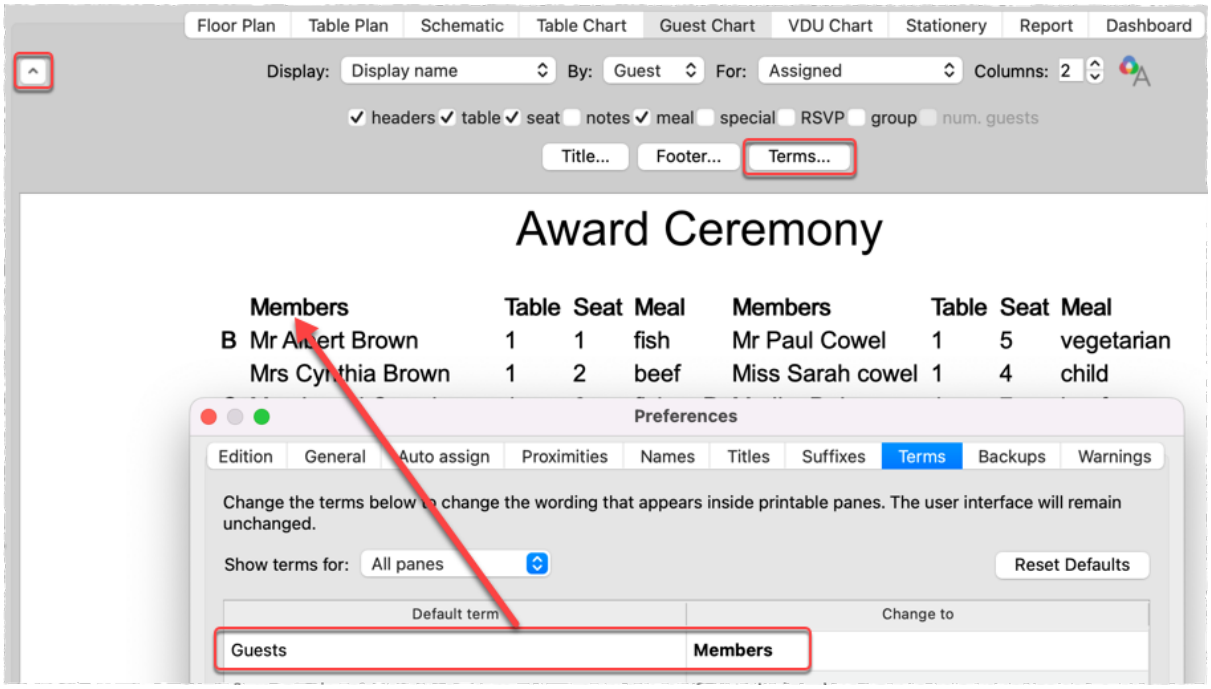

See also:

- Terms (video with audio, 0:28 minutes)

3.14.5 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

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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.

See also:

- VDU chart (video with audio, 2:17 minutes)
- Assign (or reassign) seats in real time

3.14.6 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.

3.14.7 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.

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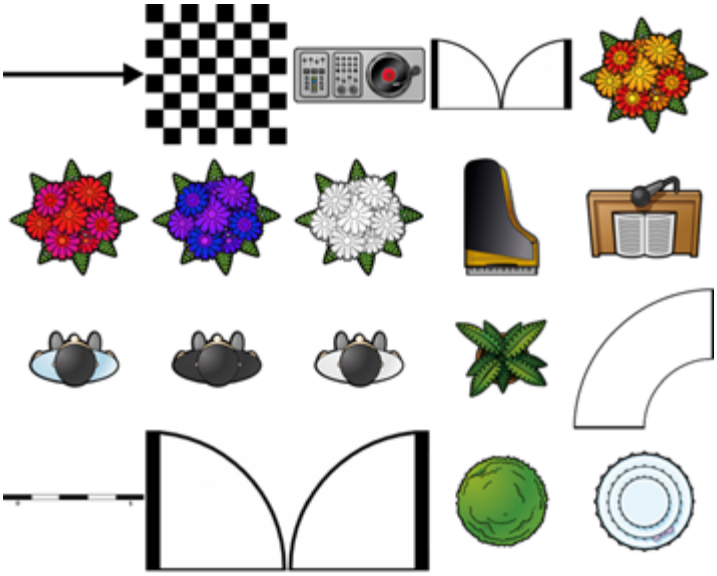

floor plan clipart

wedding clipart

© 2025 Oryx Digital Ltd

Masonic clipart

decorative clipart

PerfectTablePlan clipart

You can also use tools such as Google image search to find images.

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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

3.14.8 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 Σ **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

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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.

3.14.9 Select multiple items

In the **Guests**, **Groups** or **Schematic** pane:

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

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

See also:

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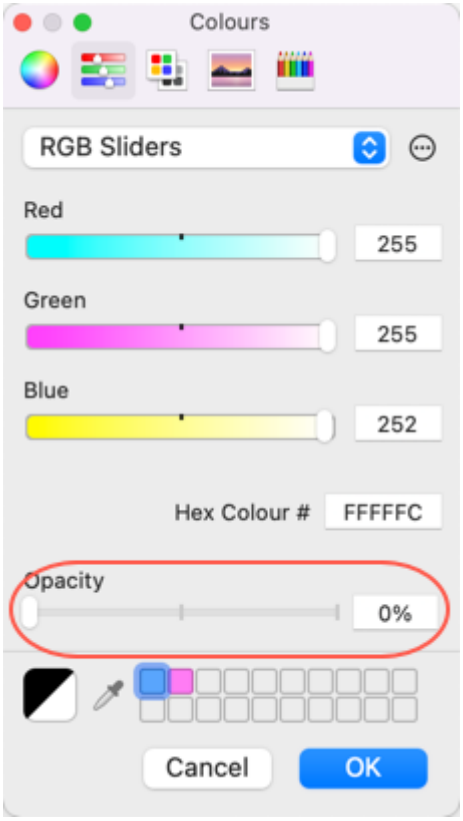
- Edit a property for multiple guests
- Edit a property for multiple tables

3.14.10 Set transparent as a colour

You can set a colour to be partially or completely transparent in the **Select Colour** window.

- For full transparency set the **Opacity** to 0%.
- For 50% transparency set the **Opacity** to 50%.
- For a standard (opaque) colour set the **Opacity** to 100%.



Using transparency allows you to hide the inside and edge of rows of seats.

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It can be tricky to find something you have made fully transparent! However you can drag a 'rubber box' in the **Floor Plan** pane (by left clicking away from items, holding down the mouse and dragging) to select transparent items.

See also:

- Change fonts and/or colours

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Frequently asked questions

4 Frequently asked questions

4.1 Frequently asked questions

For an up-to-date list of frequently asked questions see our www.perfecttableplan.com FAQ page.

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Expert tips

5 Expert tips

5.1 Expert tips

We have added a lot of features to PerfectTablePlan, with the aim of making your life easier. However, quite a few of them are hidden away to prevent the user interface from becoming too overwhelming for novice users. Below is a list of useful things you might not know about PerfectTablePlan. Taking 10 minutes to read through them could save you a lot of time, especially if you are a frequent user. Note that not all features are available in all editions.

All editions

Drag a group

If you hold down the ⇧ key while dragging a guest, it will drag all members of that group.

HTML tags

You can use HTML tags to control the use of bold, italic, line breaks etc in **Display name** field.

Textures and gradients

You can use textures and gradients for tables and shapes to liven up your floor plan. We ship a number of textures with PerfectTablePlan, including grass, tiles, marble and wood.

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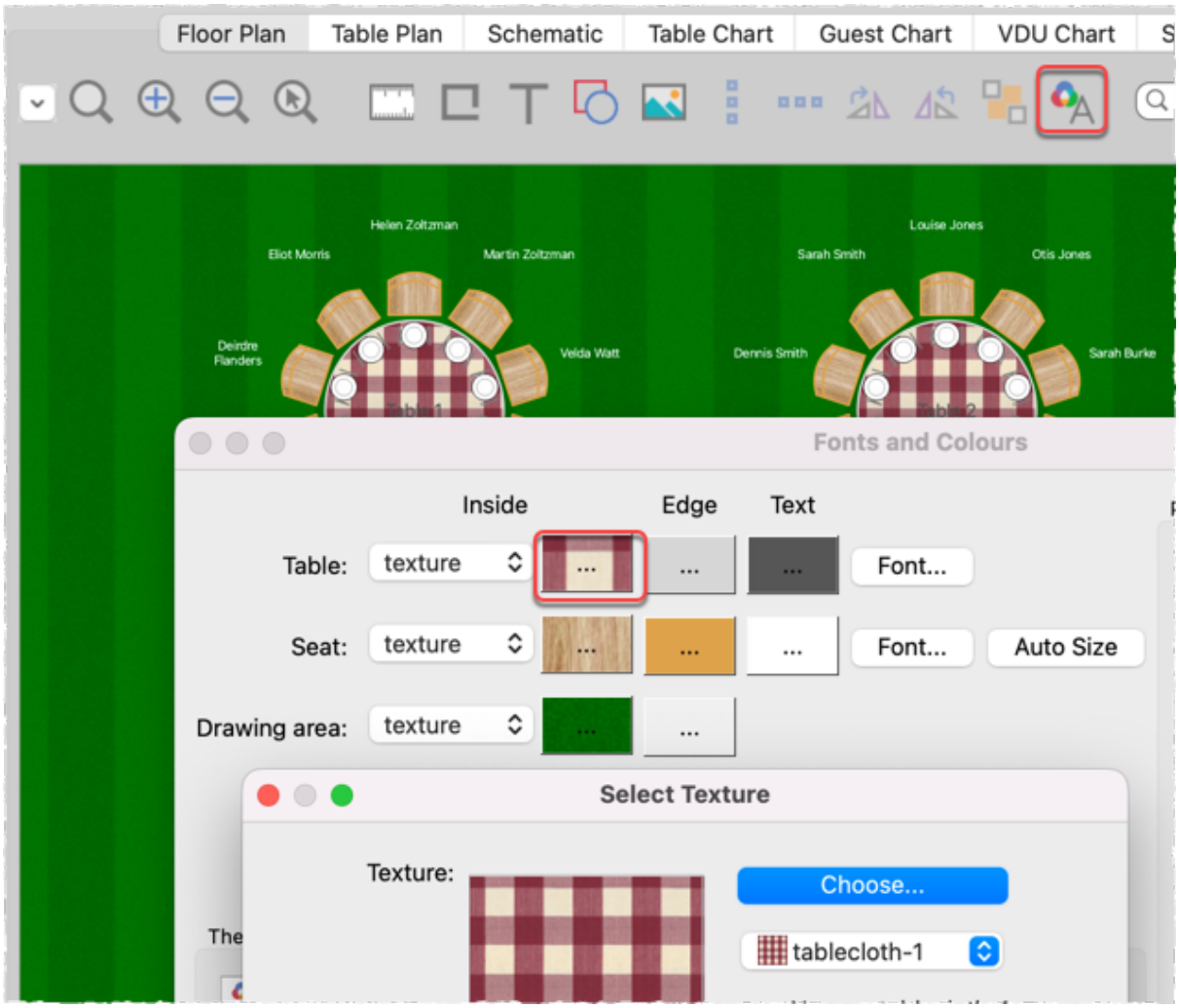
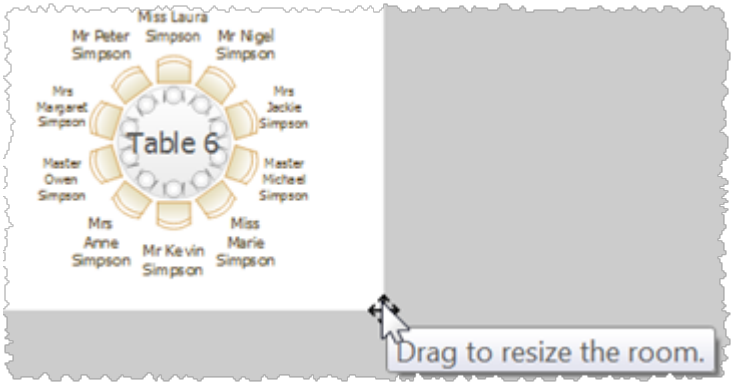


Resize the room by dragging

Change the size of the room in the **Floor plan** pane by dragging the bottom-right corner.



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Multiple meal courses

PerfectTablePlan can handle multiple meal courses. Just separate them by commas in the **Meal** field. They will be totalled separately in the **Summary** report in the Σ**Report** pane.

Resize text to fit

If you choose too large a font for guests in the **Floor plan** or **Table plan** panes, the font will be scaled smaller to fit. This will result in different font sizes. You can avoid this by auto sizing the font.

Keyboard accelerators

You will be much faster at using PerfectTablePlan if you memorize some of the keyboard accelerators.

Accelerator	Result
⌘*A*	Select all non-hidden items
⌘*G*	Insert single guest
⌘*K*	Lock selected guests
⇧⌘*K*	Unlock selected guests
⌘*O*	Open a plan
⌘*S*	Save the plan
⌘*U*	Unassign the selected guest(s)
⌘*Z*	Undo

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⌘+/⌘-	Zoom in/zoom out
⌥*Left* / ⌥*Right*	Select previous/next table
⌥*Up* / ⌥*Down*	Select previous/next guest

There is a full list of accelerators here.

Edit multiple guests

To change a property for multiple guests, select the guests, select **Edit>Guest Property** from the main menu and then select the appropriate sub-menu.

Edit multiple guest properties video

Edit multiple tables

To change a property for multiple tables, select the tables (e.g. by dragging a box around them in the floor plan), select **Edit>Table Property** from the main menu and then select the appropriate sub-menu.

Auto seat assignment

You can select **File>Auto Assign Seats** as often as you like. Each time it will start with the current seat assignments and try to improve them. The more you run it, the better the result is likely to be. Change the settings in the **Auto assign** tab of the **Preferences** window if you want it to run for more or less time.

Check guest happiness

You can colour code guests in the **Floor plan** and **Table plan** panes by how happy they are with where they are seated, based on their proximity settings. Green=happy, Red=unhappy. This is a quick way to spot any potential issue you need to address.

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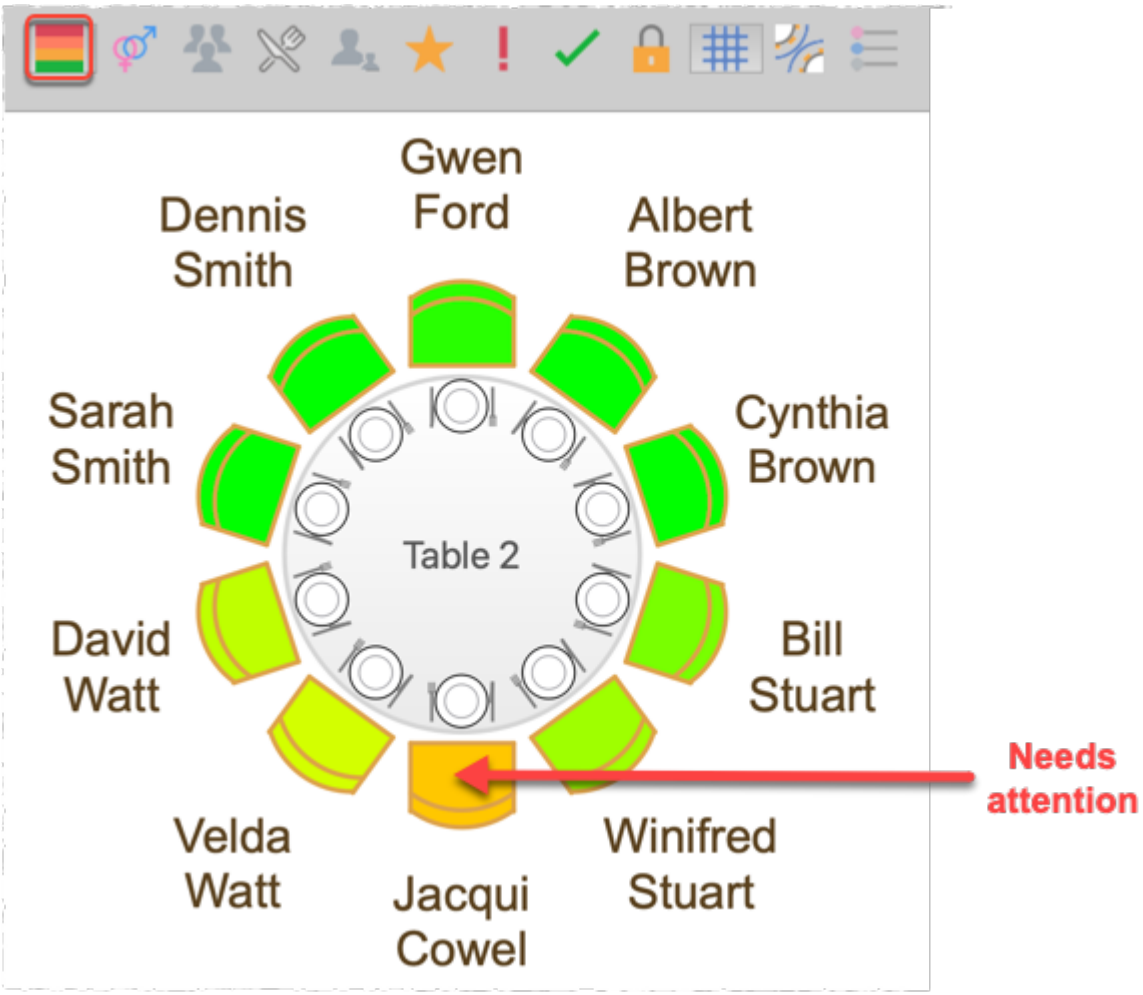

Dragging in the Floor Plan pane

If you left-click and drag you will drag out a selection rectangle. Everything inside or touching the rectangle will be selected when you release.

If you right-click and drag on the background of the floor plan, you can scroll the floor plan horizontally and vertically.

If you are zoomed in and drag a guest near to the edge of the floor plan, the pane will scroll automatically.

You can add an image by dragging it straight onto the floor plan.

Use 'Near not next to' proximity for couples

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Sometimes you want couples to sit on the same table, but not next to each other. You can use **Near not next to** proximity for this. You can set this as the default proximity for couples in the **Preferences** window.

Align tables

Aligning tables and other items in the floor plan is much easier if you turn on grid snap.

You can also select items and move them using the arrow keys. If grid snap is on it will move them one grid spacing. If grid snap is not on, the item will be moved 5 cm/2 inches (1 cm/0.4 inch if the ⇧ key is held down).

Remove/Hide empty seats

You can remove all the empty seats in a single operating using **Edit>Remove Empty Seats**. Alternatively you can hide empty seats.

Change the order guests are displayed in a group

You can change the order in which guests are displayed within a group, for example in the **Table Chart** , **Guest Chart** or **Stationery** pane, in the **Group** tab of **Guest Properties** or **Group properties** windows:

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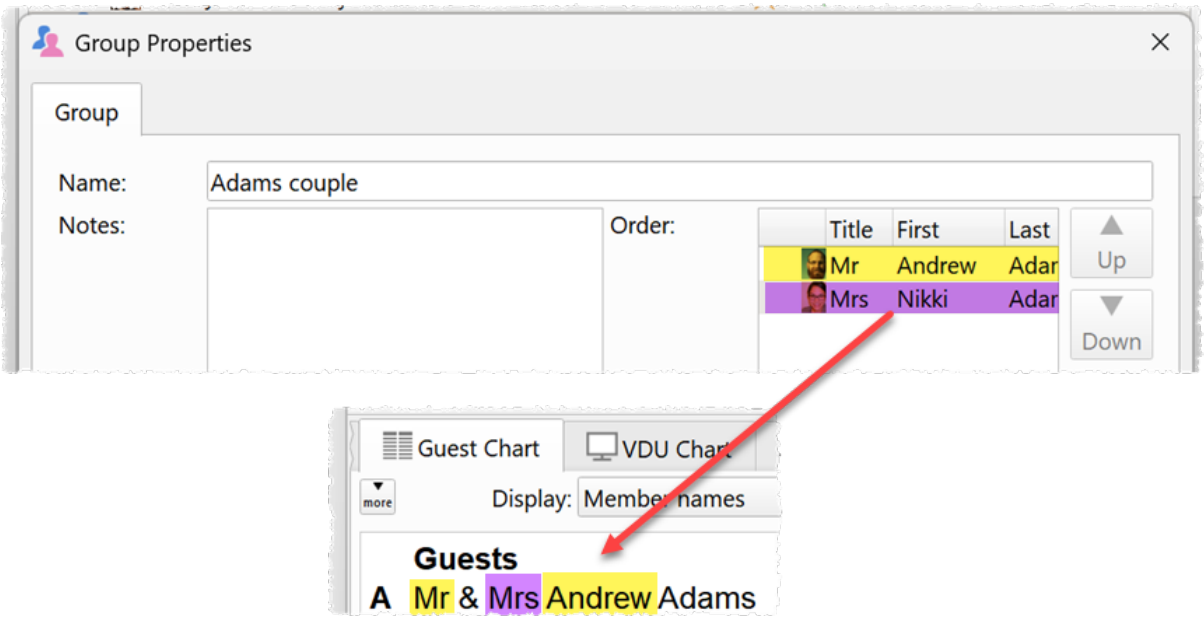

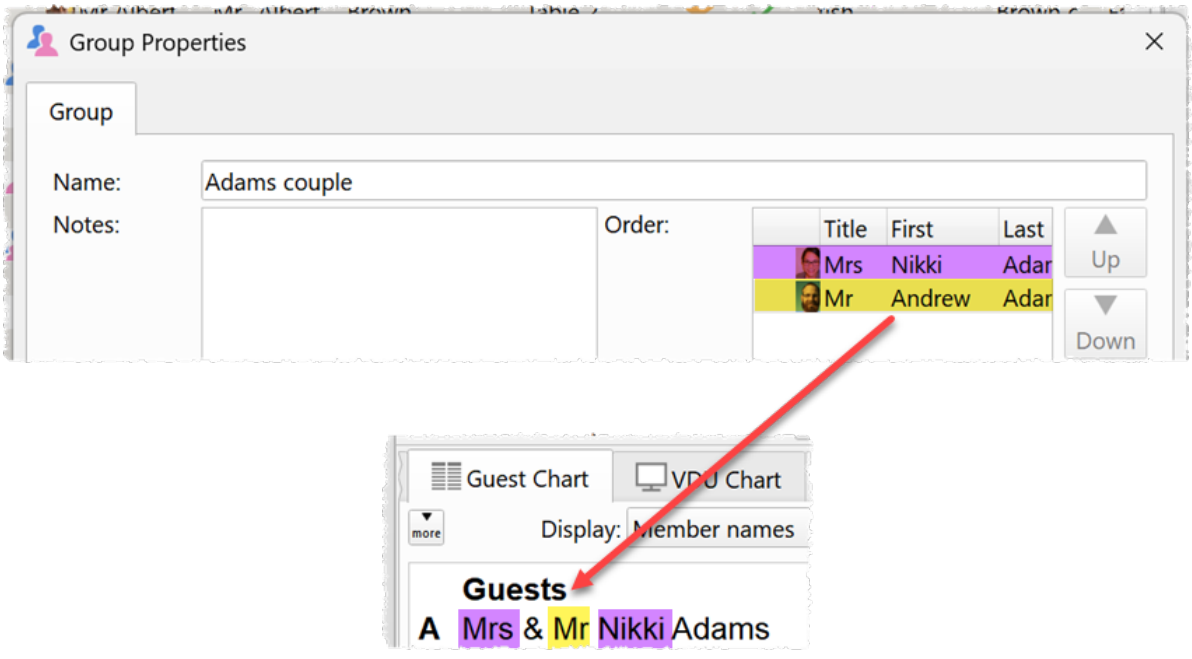

Sweetheart/cabaret tables

You can arrange seats around a circular table in a sweetheart/cabaret style arrangement.

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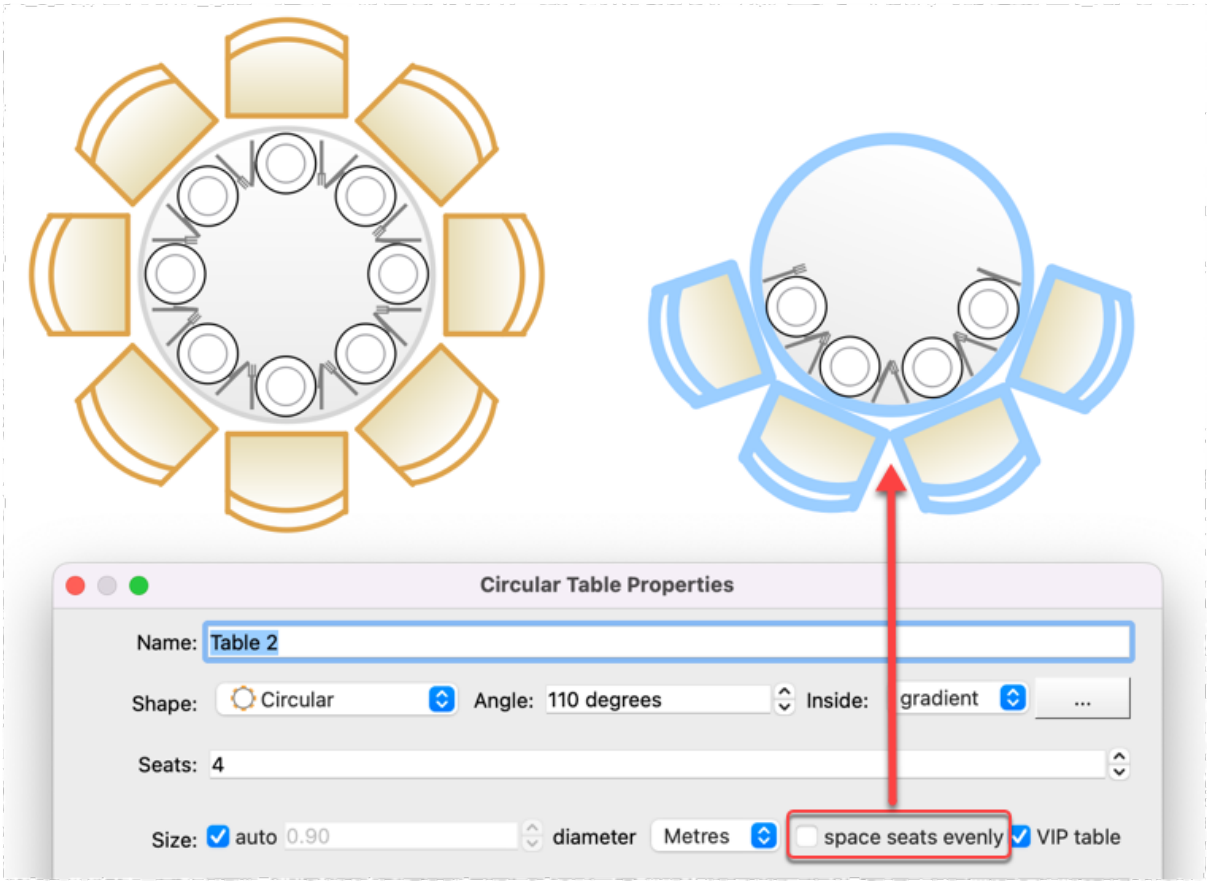

Round ended tables

You can have tables that are round at one or both ends.

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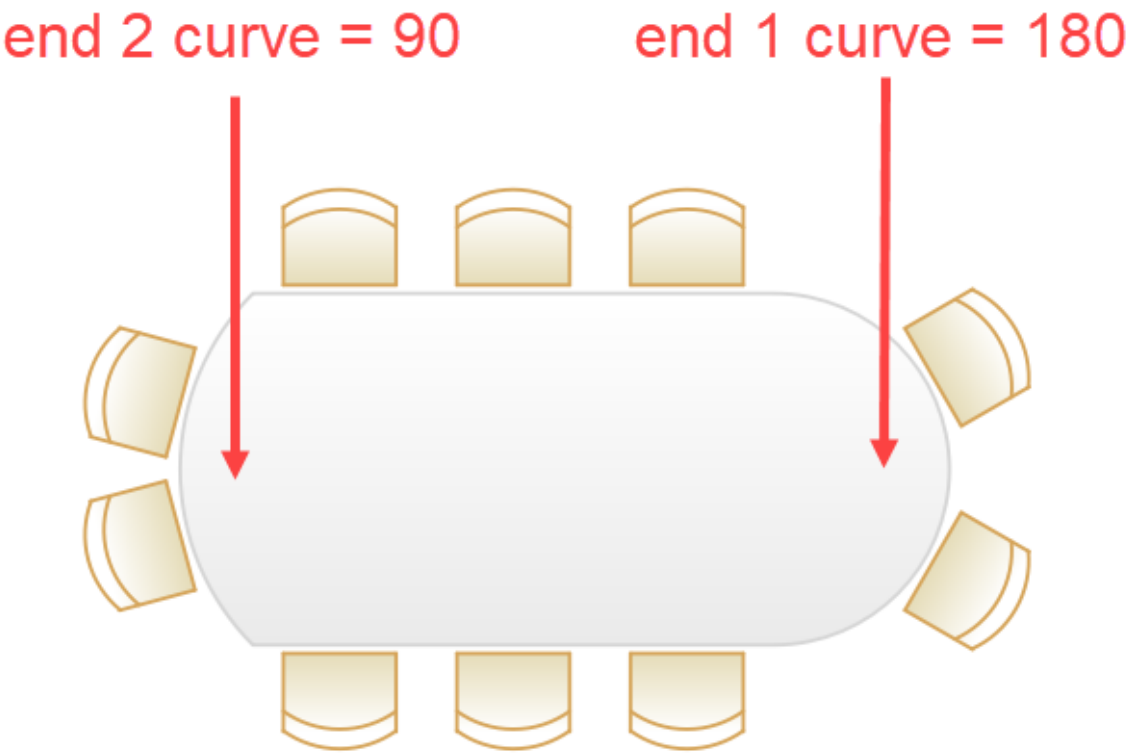
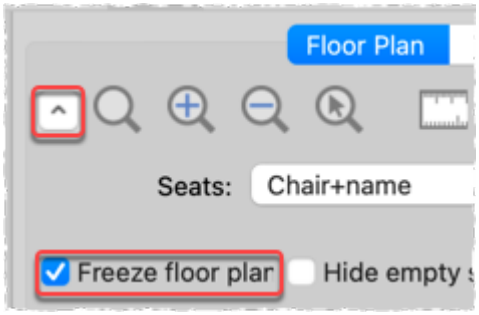


Freeze the floor plan

If you want to avoid accidentally moving tables after you have set-up your floor plan, you can freeze the floor plan.



Quick add guests

If you have a list of guest names, you can select **Insert>Quick Add Guests...** and paste the names straight in.

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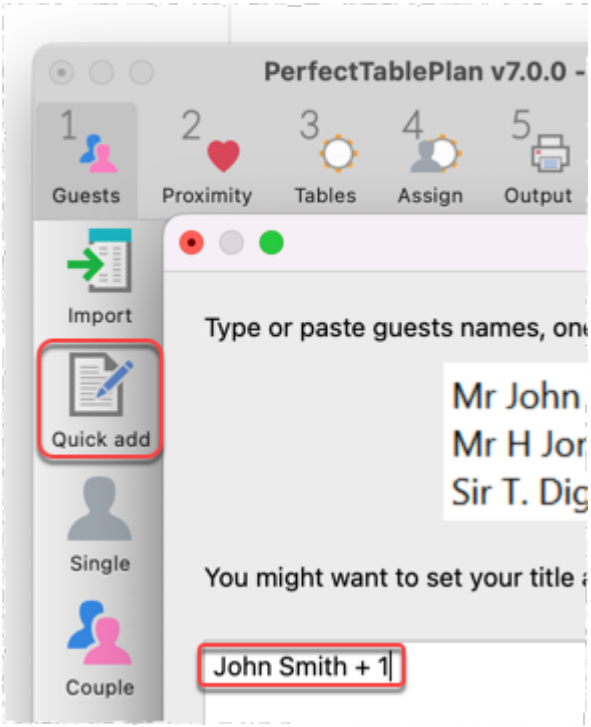

Change columns during import

If you click the **More** button in the **Import Data** window you can add, delete, split and join columns in the imported data.

Troubleshooting

The **Troubleshooting** report in the **Report** pane gives you a quick overview of any potential issues in a textual form, e.g.:

- 'Next to' guest pairs not seated near to each other
- Guests without titles
- RSVP accepted guests not assigned to seats
- Guests with no meal assigned
- Tables with empty seats

Troubleshooting report video

Export to web

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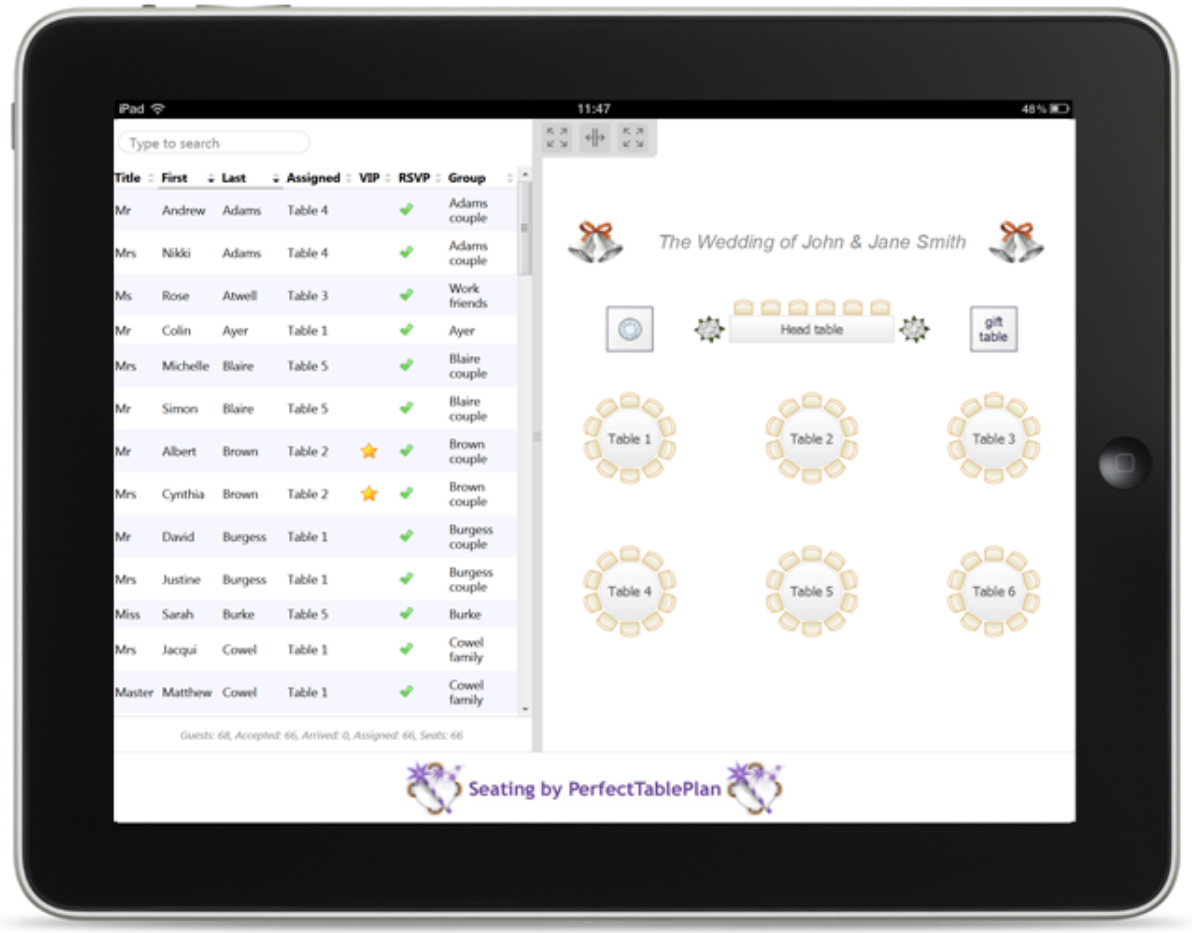
Using **File>Export...** you can export a web version of your plan that can be accessed by anyone with a web enabled device (e.g. a tablet). This can be very useful for sharing a plan with a client or to allow staff to show guests to seats at the event.



Export to web or tablet video

Show unassigned seats

You can highlight unassigned seats using the **Tables** drop-down list in the **Floor plan** pane.

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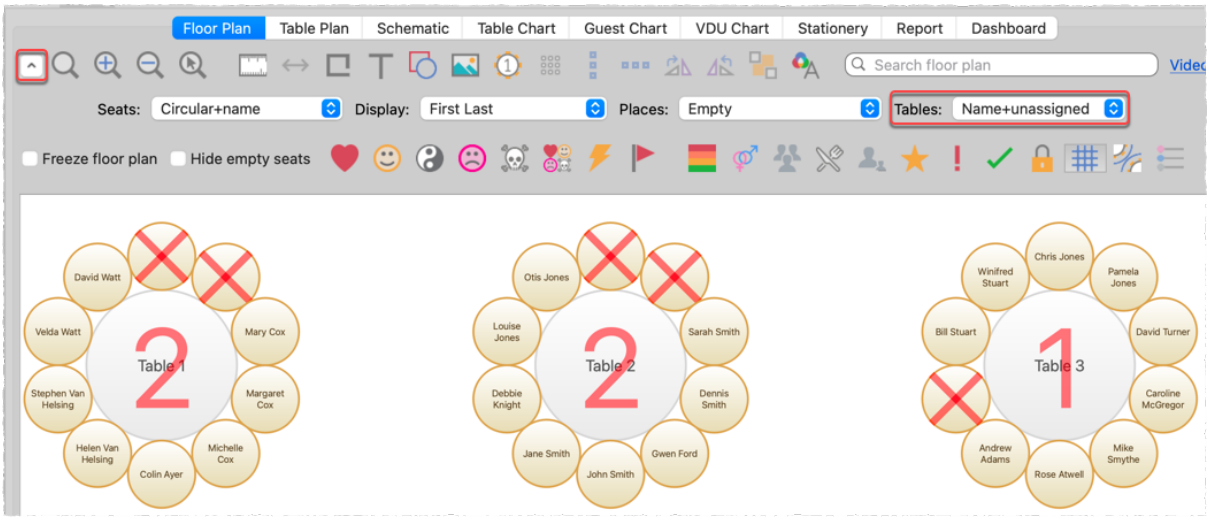
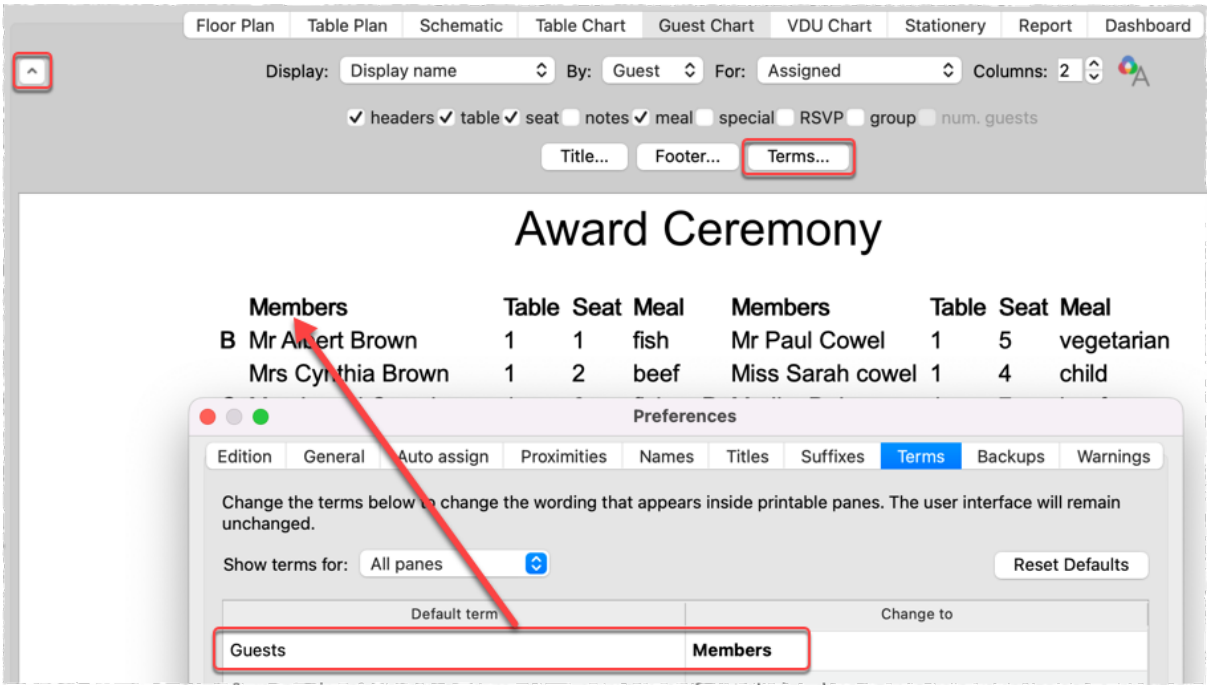


Toggle fullstops in titles

If you press *Cmd+.* PerfectTablePlan will toggle a fullstop on the titles of all guests. E.g. it will convert "Mr" to "Mr." and "Mr." to "Mr".

Change headings in charts and reports

You can change words in printouts (e.g. to a different language) using the **Terms** button.



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Terms video

Use an electronic seating chart

Guests have a bad habit of changing their minds as soon as you have printed your guest chart. You can avoid this by displaying your plan on a large VDU or Plasma screen. You can even update it in real time.

VDU chart video

Run PerfectTablePlan from a USB drive

You can run PerfectTablePlan from a portable USB drive (memory stick).

Gesture support

If your device supports gestures, you can 'pinch' to zoom in the **Floor Plan** and **Table Plan** panes.

Backup files

PerfectTablePlan automatically creates backup files for you. You can control how often and where these files are created in the **Backups** tab of the **Preferences** window. You can list backup files by selecting **File>Backups...**.

Note that this won't save you from a harddisk crash. So always backup your plans to another device. You can even email them to yourself or a colleague.

How do I? help

At the end of the main menu there is a **How do I? button**. Click on this to get context sensitive help.

Edit mode

You can easily edit individual guests in the **Guests** or **Groups** pane using **Edit** mode. Remember to switch back to **Drag and drop** mode to drag and drop guests to seats.

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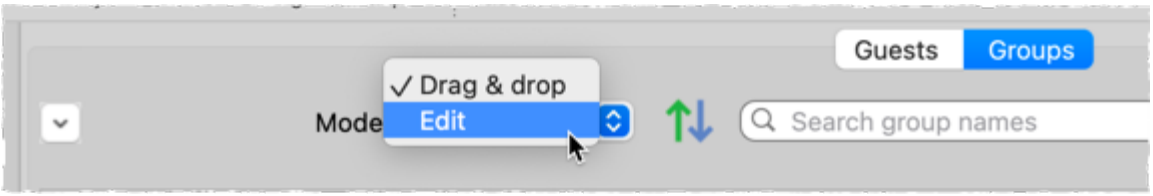
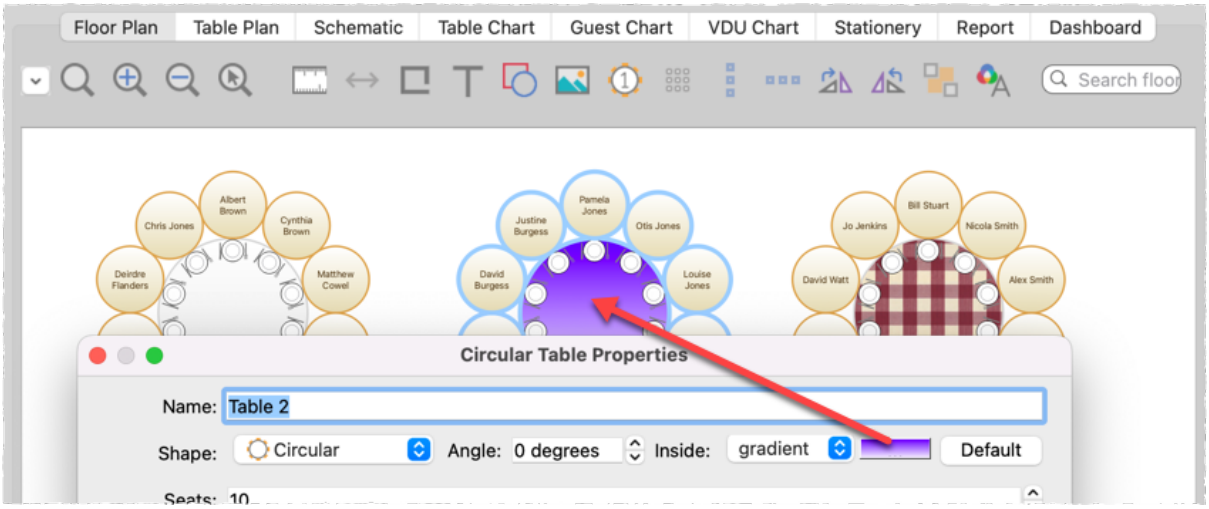


Drag and drop files

You can drag a plan file onto the **Guests**, **Groups** or **Floor plan** pane to open it. Similarly you can drag an Excel or CSV file on to PerfectTablePlan to import it.

Colour tables

You can colour tables individually in the **Floor plan** and **Table plan** panes via the **Table Properties** window.



Coloured dots on stationery

PerfectTablePlan can add coloured dots to your place cards or other stationery based on guest properties such as: gender, meal choice or custom field value. This can be useful for conveying information to serving staff.

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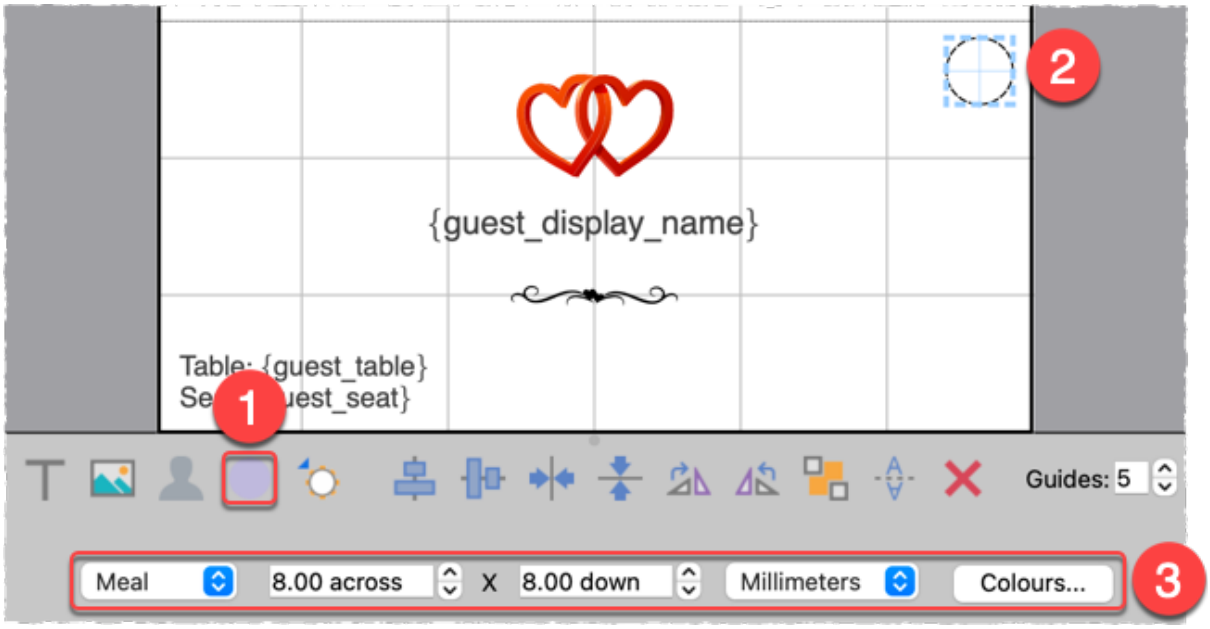
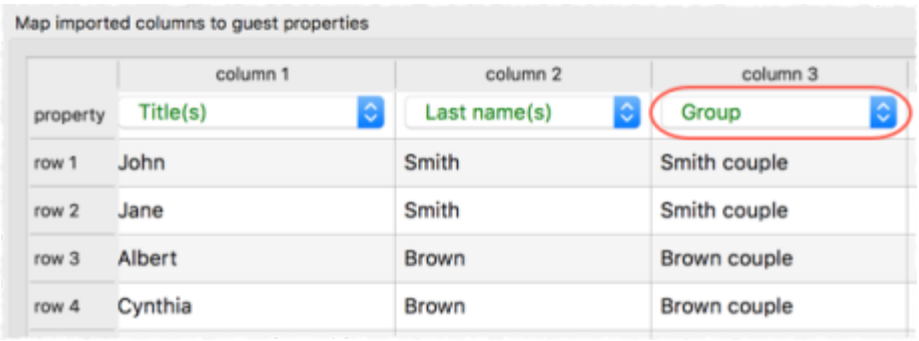


Colour coded dots video

Importing a group column

You can control how PerfectTablePlan imports guests into groups by importing a **Group** column.



Import your guest list video

Capitalise new guest names

You can automatically capitalise new guest names by checking the **automatically capitalise new guest names** check box in the **Names** tab of the **Preferences** window. This can save time if you are typing lots of names.

Custom titles and suffixes

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PerfectTablePlan is configured to recognise standard titles such as "Mr" and "Mrs". You can customize the standard titles in the **Titles** tab of the **Preferences** window. These titles will then be available in the **Titles** drop-down list in every plan. You can also associate a gender, age and VIP status with a title to make importing more intelligent.

Similarly you can customize the list of suffixes in the **Suffixes** tab of the **Preferences** window.

Sort guests by rank

You can sort guests by the rank of their title or suffix (rather than in alphabetical order).

Export to PDF

Names can be hard to read from A4 or letter sized printouts. However you can export to PDF and send the PDF to someone with a larger format printer. We list a few companies that will print PDFs for you here.

Schematic pane

The **Schematic** pane can be a useful alternative to the **Floor Plan** pane when you are dragging and dropping guests. You can also drag and drop tables into a different order (e.g. to change the order they appear in the **Table chart** pane).

Show proximity by group

The **Proximity** pane can be a bit unwieldy if you have large numbers of guests. However you can view proximity one group at a time by setting the **For** drop-down list to **By group** (to show a group at a time) or **By group+** (to show a group at a time, plus all the guests that members in that group have non-neutral proximity to).

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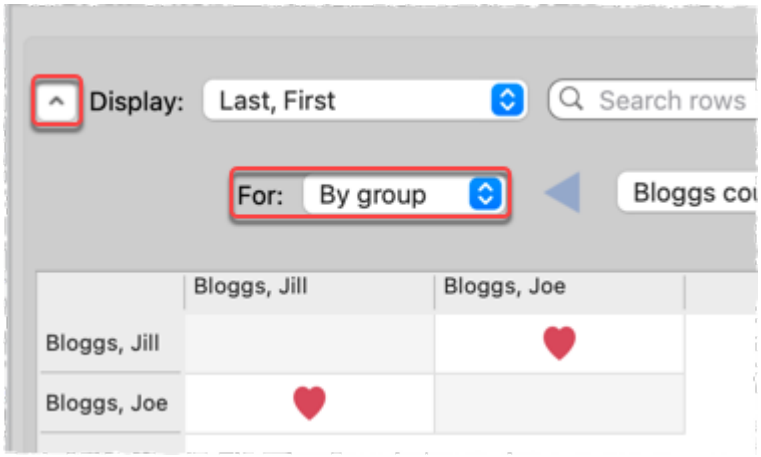

Editing the plan file directly

PerfectTablePlan plan files are stored in text files in XML format. If you are feeling brave you can edit the file using a text editor. We recommend you make a copy first though, as PerfectTablePlan won't be able to read it back in if it is not a valid XML file.

Finding plan files

If you aren't sure where a plan file is saved, you can quickly search your harddisk for it using **File>Find...** in PerfectTablePlan.

Table naming

PerfectTablePlan defaults to naming tables "Table 1", "Table 2" etc. But you can change this in the **New table name** format field in the **Naming** tab of the **Preferences** window. Use `{next_table_letter}` to default to letters and `{next_table_num}` to default to numbers.

Visualization colours

You can change the colours used to visualise meal choice, group etc.

Changing visualization colours video

Colour keys

You can display a colour key for visualisation colours.

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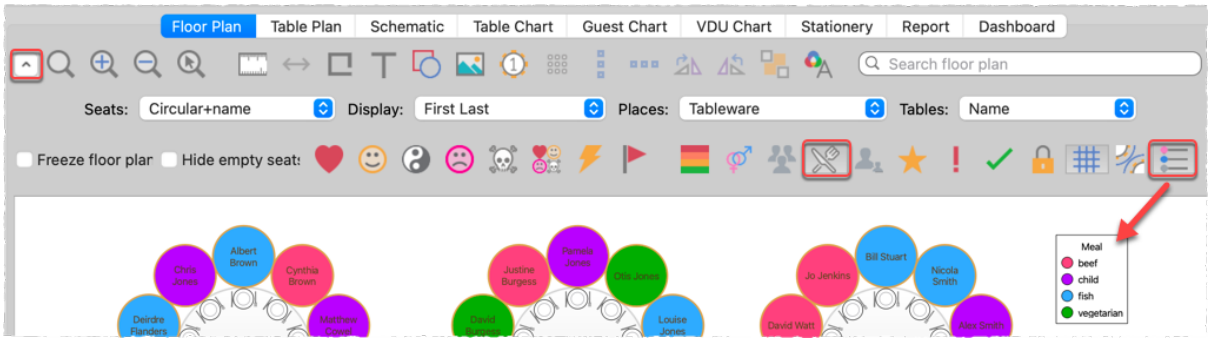

Use transparency as a colour

It can sometimes be useful to set transparent as a colour.

Estimate numbers

You can make a simple estimate of event numbers and costs in PerfectTablePlan. Just select **File>Numbers and Budget...**.

Apple Contacts

You can drag guests straight from Apple Contacts into the PerfectTablePlan **Guests** or **Groups** panes.

Replace text

Replace text in the text properties of guests, groups and tables using the **Replace Text** window.

Transfer Preferences

You can quickly transfer your **Preference** window settings from one computer to another using a .tpp file.

- On the computer you want to copy preferences from, create a .tpp file by clicking **Export Preferences...** in the **Transfer** tab of the **Preferences** window.
- Copy the exported .tpp file to the recipient computer.
- On the recipient computer, click **Import Preferences...** in the **Transfer** tab of the **Preferences** window and select the .tpp file to import.

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Advanced and Professional editions

Use a drawing of the venue

If you have a scale drawing of the venue, you can use it in your floor plan.

scaled floor plan image

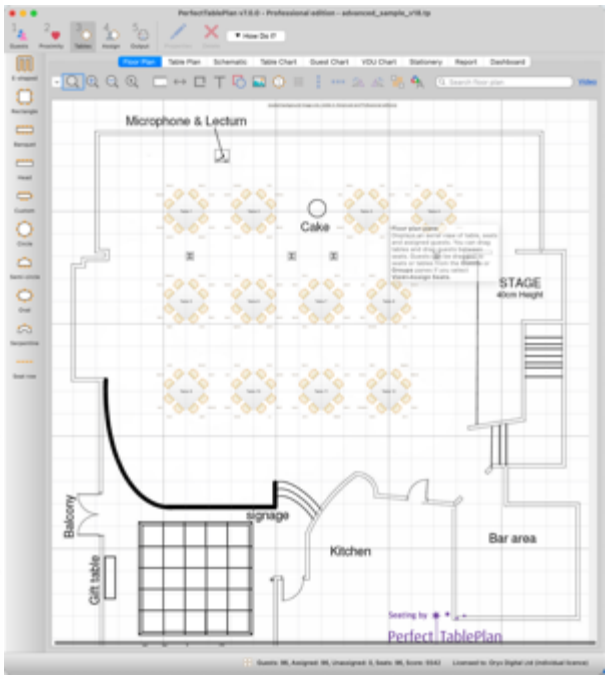

image used as floor plan background with tables added

Scaled venue images video

Use your own custom naming

In the **Floor Plan** and **Table Plan** panes you can set the **Display** drop-down list to **Custom name...** to set your own custom name format, including HTML tags and custom fields.

Add a new custom field during import

If you want to import a custom field, you don't need to add the field first. Just select **<custom field>** from the drop-down list in the **Import data** window.

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Create a template file

If you are going to use the same floor plan and/or guest list for multiple events, you can create a template file.

Personalised seating plans

You can easily print out or export to PDF table plans that are personalised to show each guest their seat.

You are here maps video

Use custom seat numbers

You can set custom seat numbers.

Flexible seat numbering video

Professional edition only

Auto assign multiple seatings

If you have an event with multiple seatings (e.g. consecutive nights at a business event) you can assign all the seatings in a single operation using **File>Auto Assign Multiple...**.

Networking event seating video

Fast table renumbering/renaming

If you have a lot of tables to rename/renumber, you can do it quickly using the **Renumber/Rename tables** window.

Fast table renumber video

Bulk edit proximity

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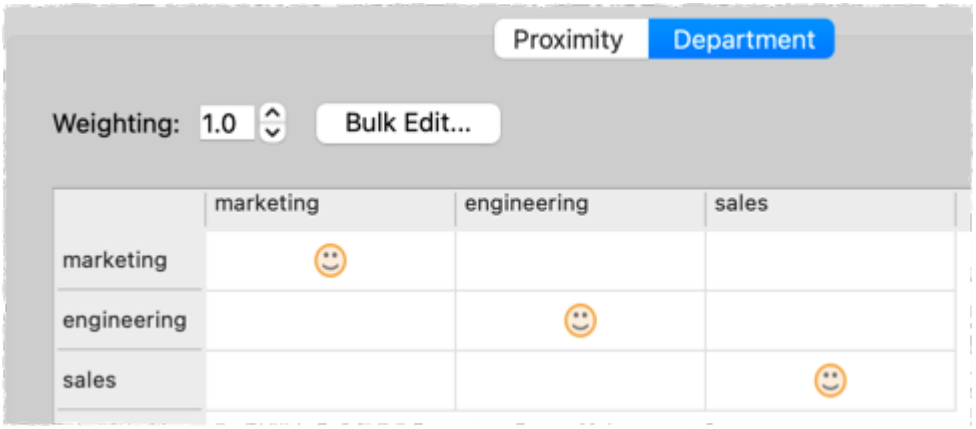
You can change lots of proximities in one operation using the **Bulk Edit Proximity** window.

Bulk edit proximity video

Set proximity by category

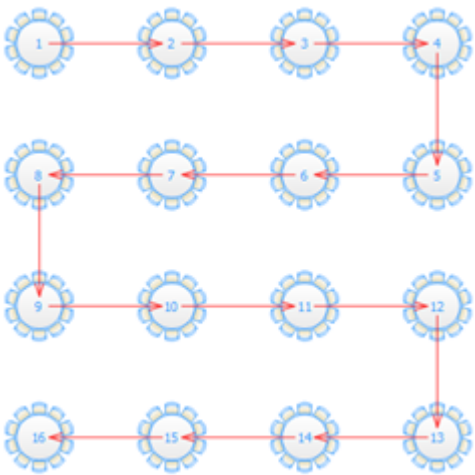
If you have categories of users you want to sit together or apart you can use custom proximity.



Custom proximity video

Fast table layout

If you have lots of tables to position in a grid, you can do it quickly using the **Table Layout** window.



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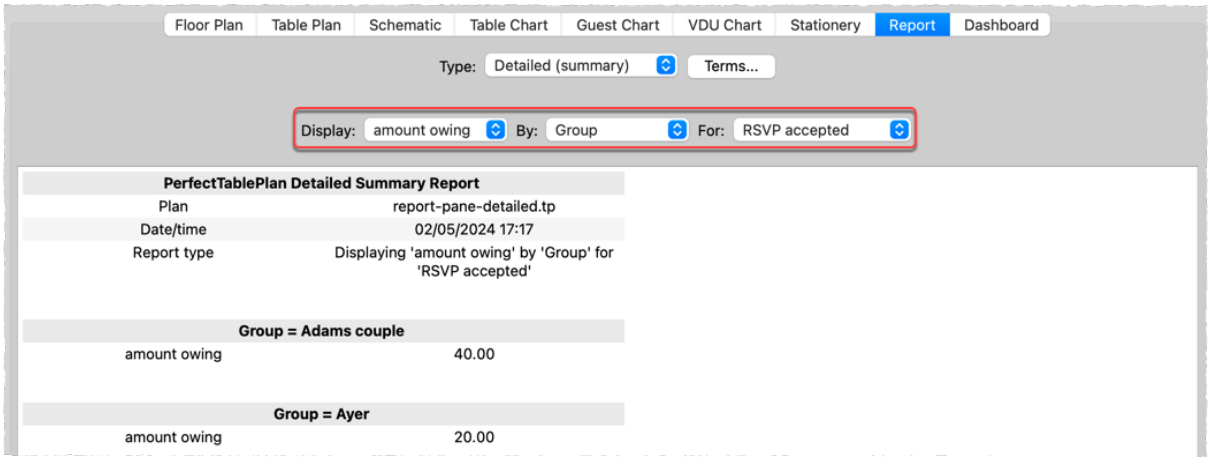
Create detailed reports

If you want to create detailed reports, e.g.: meals selected by table or the special requirements by group, you can do this using the **Detailed (summary)** and **Detailed (guests)** reports.



Detailed reports video

Print barcodes

You can print barcodes on stationery and use a barcode scanner to check-in guests. Select **File>Check-In Guests...** to activate check-in.

Import seating and proximity

You can import seating and proximity data.

Import seating data video

Merge import

It is possible to merge changes in a guest list into your plan.

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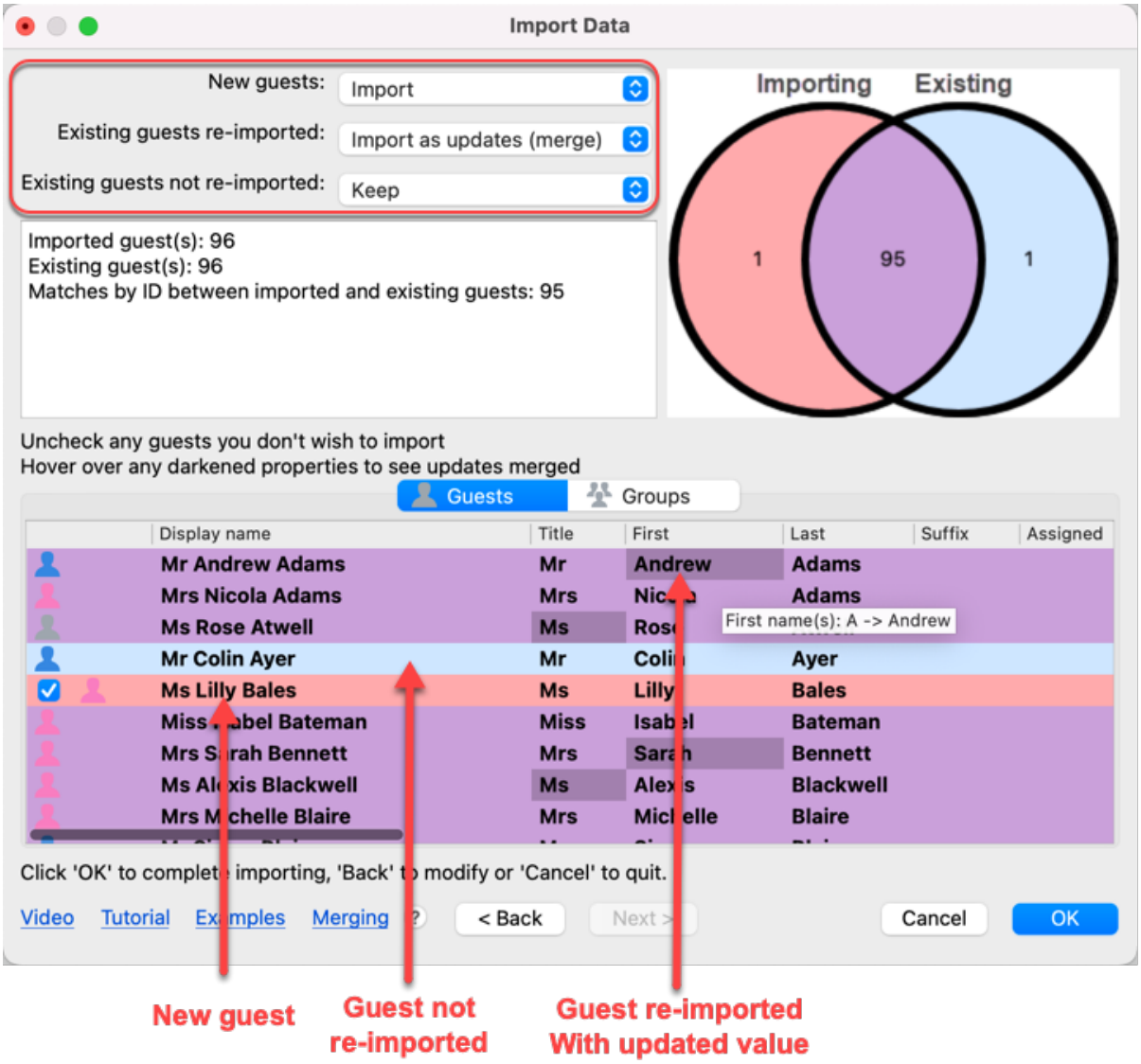

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Licensing

6 Licensing

6.1 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 buy a licence key go to www.perfecttableplan.com .

To fully activate the software select **Licensing>Licence** and enter the key into the **Licence** window.

If you purchased the software electronically off the Internet, the key will have been emailed to you.

To retrieve a licence you have previously purchased from www.perfecttableplan.com select **Licensing>Retrieve Key**.

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

Note A standard licence entitles one named person to use this software on up to 5 computers. If you have more than one person using the software you should purchase a licence key for each user. However, we allow to share your licence key with 1 immediate family member, if you are planning the same event.

You can also purchase an organizational licence.

Version 1-6 licence keys are not valid for version 7. You can upgrade to version 7 for a small fee.

You can also upgrade your edition, e.g. from PerfectTablePlan Home edition to PerfectTablePlan Advanced edition.

6.2 Qt

PerfectTablePlan uses the Qt cross-platform framework under a commercial licence.

Third party licences used by Qt are described here.

6.3 LibXL

PerfectTablePlan uses the LibXL Excel library under a commercial licence.

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Support

7 Support

7.1 Contact support

If you are having problems with the software please check if your question has already been answered in this documentation or on the www.perfecttableplan.com FAQ page. If you can't find an answer here or on the web site then email us at support@perfecttableplan.com . We will reply as quickly as we can.

7.2 Report a bug

We take every effort to deliver high quality software. However, the sheer complexity of software and the number of platforms and configurations we have to support means that we can't guarantee our software is completely bug free. Please report any bugs you find to sales@perfecttableplan.com and we will attempt to fix them. Please include:

- a description of the bug
- your operating system (e.g. macOS 14.0)
- the version of PerfectTablePlan (from the **About** window)
- a step-by-step description of how we can reproduce the problem
- a screen capture can often be helpful

The step-by-step description is particularly important - if we can't reproduce your problem, then we probably won't be able to fix it.

To assist us in fixing bugs we have added email-based error reporting. When PerfectTablePlan detects that something has gone horribly wrong it will try to email a report to sales@perfecttableplan.com (with your permission). Please send the email and add any relevant details.

7.3 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 .

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Updates

8 Updates

8.1 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. v7.0.0 and v7.1.1 will both work with a v7 licence key). Major updates require a licence key upgrade (e.g. a v6 licence key will not work with version 7.0.0). 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.

8.2 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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