
CRW120 Work with Seminars

Overview

This system creates and manages training sessions and seminars and integrates within the Bookmaster CRM and Project system. The “seminar” project contains seminar information, financial information regarding costs/revenue and links to delegates attending the seminar.

A venues file has also been developed to allow multiple venues per seminar and capturing venue specific information.

The process of registering Attendees is captured through order entry, using designated charge codes which will enables us to link single or multiple attendees per customer.

Seminars have also been integrated with CRM allowing the users to view the seminars. The contacts are registered for invoice for the registration and their status i.e. paid, attending etc.

Purpose

This panel allows you to:

- Display existing seminar.

- Work with Resource, Speaker, Attendee and Organizers.

Examples

This section illustrates examples concerning:

- [Example 1: Work with Seminars](#)

- [Example 2: Display Resource](#)

- [Example 3: Display Event Manager](#)

- [Example 4: Display Speaker](#)

- [Example 5: Display Attendee](#)

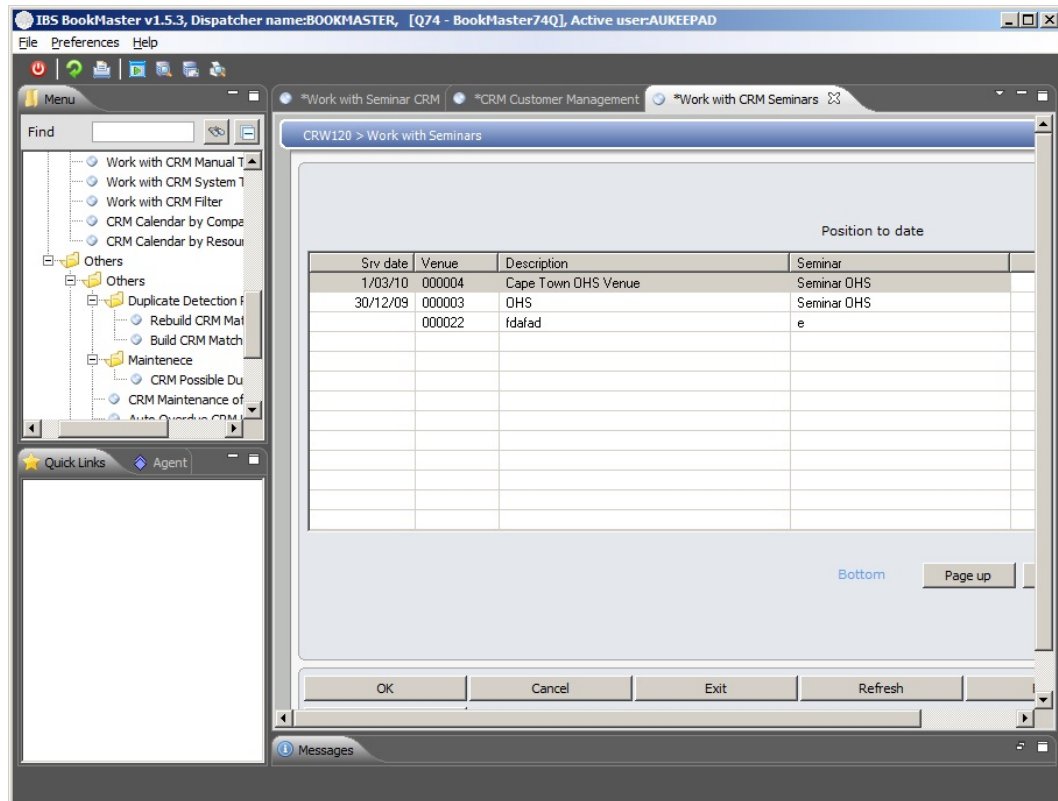
- [Example 6: Display Organizer](#)

Example 1: Work with Seminars

This example describes how to work with seminars.

1. Select option **Work with CRM Seminars** from Publishing Modules>Customer Relationship Management>Maintenance.

CRW120 Work with Seminars main panel is displayed.



Functions

Filter

Filter to select particular contact from a list of contacts.

Tabs

Cust trans

Access Document Inquiry by Customer to display every transaction for particular customer.

Cust/item trans

Access Transaction Inquiry to display transaction either by customer or by item.

O/S trans

Access outstanding Order Inquiry to display all outstanding orders for particular customer.

Cust details

Access Customer Masterfile in inquiry mode.

Delivery number

Access Delivery number selection in inquiry mode.

Cust Maint

Access Customer Masterfile in change mode to modify existing customer masterfile details.

Contact UDF

Access Contact Extended Information in change mode to change additional user defined field information about contact.

Account

Access Contact type in maintenance mode to select type of contact for particular customer.

Contact

Access Work with Contact in change mode to change contact details.

Contact Attr	Access Work with Contact Attributes in change mode to modify attributes value.
Contact Address	Access Contact Address in maintenance mode to change address for the contact.
External User	Access work with External User in change mode to change external user details.
Contact Type	Access Contact type in maintenance mode to select type of contact for particular customer.
Options	
Display	Access BPM410 Work with Resource, where the Name tags, Attendee List, Inquiries and Email information is displayed.
Resource	Access BPM410 work with Attendees, where text and email can be created.
Speaker	The customer and contact are displayed for the selected venue
Attendee	The Contacts are displayed for the selected venue
Organizer	The Organizer is displayed for the selected venue.
Relevant Fields	
Srv date	The date on which seminar will be held.
Venue	The venue at which seminar will be held.
Description	This is a brief description of the issue, template or action being created. When exporting information to Excel a description can be exported.
Seminar	The name for the seminar.

Example 2: Display Resource

1. Repeat step 1 and step 2 from [Example 1: Work with Seminars](#).
2. Select any seminar and click option **Display**.

BPM410-Work with Resource main panel is displayed. It access different types of resources for selected seminar in maintenance mode. It allows you to maintain Email addresses, Attendee list and Name tags for particular resource. Please refer to document **BPM410** for further details.

Example 3: Display Event Manager

1. Repeat step 1 and step 2 from [Example 1: Work with Seminars](#).
2. Select any seminar and click option **Resource**.

BPM410-Work with Event Manager main panel is displayed. Please refer to document **BPM410** for further details.

Example 4: Display Speaker

1. Repeat step 1 and step 2 from [Example 1: Work with Seminars](#).
2. Select any seminar and click option **Speaker**.

A list of speakers for a particular seminar at selected venue is displayed.

Example 5: Display Attendee

1. Repeat step 1 and step 2 from [Example 1: Work with Seminars](#).
2. Select any seminar and click option **Attendee**.

A list of attendees for a particular seminar at selected venue is displayed.

Example 6: Display Organizer

1. Repeat step 1 and step 2 from [Example 1: Work with Seminars](#).
2. Select any seminar and click option **Organizer**.

A list of organizers for a particular seminar at selected venue is displayed.