MEMBERS ONLY allows you to manage a meeting as simple as a single session lasting a few hours, or a weeklong conference with hundreds of optional sessions. In addition to tracking your registered guests and managing the financial aspects of their registration, the system keeps tabs on all personnel associated with each session - speakers, officiators, panelists, and your own staff. A suite of over twenty built-in reports is provided to put all this information at your fingertips.

Meeting Setup

During meeting setup you can:

- Set up each **meeting** that you will be running. You can have any number of active meetings in your system at one time.

- Each meeting can be part of a series of similar meetings. This way you can report on the attendance, revenue, and other aspects of the entire series.

- Assign a **General Ledger revenue account** to hold the revenue from the meeting.

- Create a **key personnel** list for the meeting, with their associated roles, such as Keynote Speaker, Convener, and so on..

- Set up a **pricing schedule** for the meeting. You can set up any number of pricing levels for the meeting - such as Member Rate, Nonmember Rate, Press, Student, and so on. At each level you may have early, regular, and late rates.

- List the **hotels** where housing arrangements have been made for meeting attendees. Store the room rates, number of rooms in the block, release dates, and other information. The optional **Advanced Lodging Pack** allows you to manage all aspects of your attendees' room reservations.

- Set up a **cancellation policy** for each meeting. Determine how late in the game a registrant may cancel and how much of his or her fee will be refunded.

- Set up the **continuing education** credits awarded for the meeting, if any

- Set up **special items** that can be rented or purchased by registrants at the meeting, such as golf clubs and shoes.

Set up the **sessions** or other special events, which comprise your meeting or conference. These may be business meetings, presentations, or social events. Track the date, time, and location of each session. Set up a maximum number of registrants for each event.

Session Setup

- You may assign to each session a **maximum number of allowed registrants.** You may also record the **date, time, and location** of each session. A session may have a **session type**, such as administrative session, technical session, social event, etc.

- Set up **additional pricing** for each optional session where there are additional fees beyond the meeting registration.

- Set up **continuing education** credits for any session if these are offered.

- Set up a **speaker list** for each session. The persons listed here may be presenters, moderators, interpreters, guests, or any other category of participant.

- Develop a **function sheet** for each session, holding seating, food & beverage, and audiovisual requirements for the session.

Registration

- **Register** your attendees right from the Person form, allowing quick entry of new customers or correction of out-of-date addresses during the registration process.

- For registrations of members who you know are already within the system, registering from the Meeting screen can provide even faster data entry.

- Registration for **optional sessions** is handled quickly and easily on the second page of the registration form.

- Automatically **wait-lists** persons applying for a session, which is over its maximum.

- Enter **payment information** at the same time.

- Record each registrant's **special needs** and requests on a Memopad right on the registration form.

- Any number of payments and adjustments may be entered against a registration.

- Print **confirmations** and invoices either automatically as you enter registrations, or in a daily batch.

- Print or reprint **individual badges, certificates, and itineraries.**

- Use one-click menu choices to perform all the necessary accounting and database operations associated with **cancellations**, **transfers**, and **substitutions**.

- Generate **deposit listings** of all moneys entered through the Members Only AR module.

- View a **history of each person's participation** in your meetings on the Registration tab of their Personal Information form.

Meeting Administration

The Meetings Module is fully integrated with the **MEMBERS ONLY** query and AR modules for reporting purposes. In addition, the module contains a large set of built-in outputs:

- Print **Badges, Rosters, Labels, Certificates**, and **Table Placards** for all participants.

- **In-house rosters** show each registrant's payment status and special requests. Participant rosters show name, address, and phone numbers for distribution to all participants.

- Print **invoices** for all registrations bearing a balance.

- Print a **roster** and a **waiting list** for each individual session.

- Print **upcoming meeting schedules** by month or for an entire year.

- Print a **Function Sheet** or Banquet Event Order for each session.

- Print a **Staff Assignment Sheet** showing where your staff members are at any time.

Meetings Information at a Glance

Throughout the module your users can check the great many **"view-at-a-glance"** screens to obtain up-to-the-minute information on the status of any meeting.

On the **Meeting Information Form**:
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On the **Hotel Information Form**:
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On the **Personal Information Form**:
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On the **Session Information Form**
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