INSTRUCTIONS FOR TAKING A TOUR OF THE SR WEBSITE

TIPS FOR USING www.seminarregistrations.com (SR) TO CREATE YOUR seminars/workshops, view reservations, make reservations, add & edit existing data once you have your own account with your email and password. For now take tour of SR using the tour account. First, on the SR Welcome page (where you downloaded these instructions):

LOG IN by using tour@callogix.net **when asked for an email address and use** tour **for the password.** Now you are on the "Control Panel" where you can view the reservation lists for your events, create a new seminar, and change login information.

VIEW RESERVATIONS: The first item on the menu is "Seminar List". Click on this and then click on the word "reservations". You will have an option to look at past or present seminars. You also have an option to view just the wait list or cancelled list. When the screen opens with names and addresses you will notice it is in alphabetical order. We suggest you scroll to the right and click in the column titled "reservation ID". This will resort the list and allow you to identify all persons in a particular party by reservation ID number, i.e., original caller and guests. You will notice the word cancel next to each name. This allows you to cancel an attendee if you wish upon being notified they do not wish to attend.

EDIT OR CHANGE EXISTING SEMINAR DATA: The first item on the menu is "seminar list". Click on this and then click on the word "edit". Your seminar data will appear on the screen. You may change information on this page. After you have completed your changes, click on the button below "submit".

EDIT NAMES, ADDRESSES OR PHONE NUMBERS OF ATTENDEES: To change an existing name, address or phone number, click on seminar list, then reservations, then the word "edit" next to the name of attendee. When the screen comes up, make your changes, then click on update.

Click on "ADD A SEMINAR". All fields with an * are required and must be complete in order to submit the form. When you complete the first seminar date and click on the "submit" button at the bottom of the screen, your next screen will tell you your seminar data has been added. If you wish to add additional seminars, click on the word "BACK" on this page, just change the dates and locations where applicable, go to the bottom and put a check mark in "create a new seminar" and click on submit. When you no longer wish to add additional seminars, click on control panel at the top right to exit and return to the menu.

SELECT THE LOCATION for your event. All locations currently on file are listed alphabetically by state, then by city, then by name. If your location is there just click on it. If it is not there click on the blue "click here" to add a location on the left side of the page. Add the required information. Directions to the location are optional, and are best kept short and simple. If a caller asks for directions, our operators will read the text in this field.

DESCRIPTION of the seminar is optional and is used to include information such as the length of the seminar. (DO NOT ENTER DIRECTIONS TO THE FACILITY IN THIS FIELD)

DNIS is your four digit "box" number. This is a "default" field based on your login ID and the account you selected, if you have more than one. This is a security feature. Please advise CaLLogix immediately if the DNIS is other than your box number.

SEMINAR STARTS ON: click on the box to the far right for a calendar to pop up. The calendar automatically loads the current calendar month. Be sure to scroll forward with the arrow in the upper right corner of the calendar to select the correct month. Click on the date of your event and the box will fill in, in mm/dd/yyyy format. In the next box, use the drop down menu to select the hour your event begins. In the next box use the drop down menu to select the minute that your event begins. In the next box select AM or PM. (Please note: Clicking too fast or too many times may result in the calendar to minimize itself onto your tool bar. If you do not see the calendar check your toolbar at the bottom of your screen.) You may bypass utilizing the auto populating calendar option and enter the date of the seminar manually using mm/dd/yyyy format.

STOP TAKING RESERVATION ON: works just like the start time. You will select the specific date and time at which you would like CaLLogix to stop taking your reservations. We can take reservations up until the start time, or any time prior to the start time. Many clients prefer a few hours or even a few days to wrap up preparations. Within 15 minutes of your designated "stop time", you will be sent a complete roster with names and phone numbers for all reservations taken by CaLLogix.

MAXIMUM CAPACITY: enter the maximum number of people that you can accommodate at your event.

SEATS YOU HAVE RESERVED: this is the number of reservations you may have taken yourself, such as from response cards. Our system will keep a tally so that your event is not over booked. For example if your maximum capacity is 50 and you have reserved 10 seats through response cards, CaLLogix will only fill 40 seats. It is your responsibility to update this information on the website. Or, you may click on "make a reservation" and complete the reservation online. If you do, there is not need to fill in the "seats you have reserved" space.

MEAL: indicate if a meal is served. For examples, "no meal", "dinner served" or "light refreshments". If there are meal choices that you would like us to offer your callers, those choices must be entered as "Additional Questions". See below.

ADDITIONAL QUESTIONS: We always ask for the caller's name, address, a day and evening phone number, an email address, plus names and phone numbers of any additional guests. If you have other requirements, such as meal choices, use this feature. Be sure to enter the question exactly as you would like our operators to ask it. Do not include instructions on how to ask it or how to respond to a caller's answers but only the question itself. You must click on "Add" after entering your question, or it will not be included in your programming. Multiple questions may be entered – just be sure to click on "add" after each one. You may also "delete" additional questions if you change your mind or find typographical errors afterward. This area is for questions only and not statements, FAQ's or instructions for operators on how to handle calls.

CHECK MARKS in the boxes for confirmation number and wait-listing mean, "Yes, I want that service". These options are free. It is **your** responsibility to call the wait-listed person and schedule them, when an opening becomes available.

MULTIPLE SEMINARS When you are done with your first seminar, click on the "SUBMIT" button. Your next screen should say "your seminar has been added to the database" and the word back. If you need to add another seminar, click on back, change the appropriate boxes, i.e., dates, times, etc., go to the bottom of the page, put a check in the space provided next to "create a new seminar", then click on submit. If you are done adding seminars, click on the control panel, top right corner.

OUTBOUND CAMPAIGN: If you would like confirmation calls made one to two days prior to each seminar, click a 'check' in the **outbound campaign box** for each seminar date and click the **submit** button each time. This must be done at least five business days prior to your needing the call-outs. The results of the outbound calls are found on the www.seminarregsistrations.com website by clicking on "outbound campaign". Please remember, there is a charge of $1.00 per call. Up to 3 attempts will be made to reach a live person or leave a message on a machine.