ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

Marco Men's Club

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Please contact me if you have questions or comments.

(See footer for document revision date)

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Don't be intimidated.

This is an easy read with lots of pictures. Most of what you need is in the first 4 steps.

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QUICK START GUIDE
(Intended for previous users, and folks comfortable with Excel)

1. **DOWNLOAD EXCEL SPREADSHEET:**
    Go the MMC website and download a fresh copy of the spreadsheet (.xls or .xlsx). http://marcomensclub.com/Forms/Forms.htm Scroll to item 12D, or use the shortcut link at the top of the page to get there.
2. Save the template to your computer, and rename it for your event. (example: "Sweetheart Ball 2018.xlsx")
3. **ALL DATA ENTRY:**
    Open the spreadsheet and click on the first tab, Tab(1), labeled *(1) All data entry*. Just about everything you enter on this spreadsheet will go here. Enable editing if necessary…this depends on your Browser & Excel security settings. Do not edit other tabs, unless told to do so!
4. On Tab(1) fill in the pink boxes 1 through 6 that describe your event.
5. Scroll the bottom section of the spreadsheet up, so that line # one (1) (SS row 18), shows below the locked header section. Make your first attendee entry there. Typically, this entry is the HOST.
    Tip 1: If you enter your last like "CRANE -Host", that will appear on your Name Tag.
    Tip 2: After you enter your name go to Tab(3) and Tabs(6A&B) to see how Name Tags and Envelope Labels will look. Go back to Tab(1) to make any changes.
6. If your event has meal selections *replace the column headings* with descriptions of your meal selections for your event (i.e., FRIED CHICKEN, BAKED FISH, PRIME RIB, etc.) Leave unneeded columns blank. (right click on cell and click "Clear Contents")
    Tip: Briefly go to Tab(5) to see how the Meal Tickets will look. Go back to Tab(1) to make any changes.
7. Log in data as you receive checks in the mail. The spreadsheet will monitor the number of people times cost per person, by line, and will alert you to any discrepancies by showing a red "?", and the amount of the discrepancy on the appropriate line. Note that the (free) Host always shows up as an error (because they didn't pay!).
8. Use multiple lines for couples with different last names. Leave blank any unused cells.
9. Use the "Group or Table" column to keep a group together when sorting and printing Name Tags. You can use letters and/or numbers. This is useful if there will be assigned tables. In that case, enter, for example, "TABLE 999", or "CRANE TABLE". This will print on the Envelope Labels, saving you a lot of time.
    Tip: Exactly what you enter in the "Group or Table" column will print on the Envelope Label.
10. Enter a "1" or a "2" in the appropriate cells under the meal choices. Enter numbers, not text such as "X". The spreadsheet will keep track of any mistakes, and insure that every person has a meal assignment. Error messages will appear to the right of each line if there is a problem.

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11. **PRINT LISTS OF NAMES:**

    At any time, you may view or print the info on Tab (2).   Optionally, you may choose to sort the data on Tab(2). The sort conditions are already set up. Select the portion of the page that contains data for your event (no blank lines) and sort. Name Tags & Envelope Labels will print in the same order as the info on Tab(2). Do not enter or edit any data on Tab(2).

12. **PRINT NAME TAGS:**

    Two slightly different printer Tab(3)s are available. Both have the same data, imported from Tab(2). Print the first page of Name Tags on regular paper using each Tabs(3A&B) and check against the Avery sheet of Name Tag labels. Choose the best fit for your event and printer. Contact me if there is an issue. Do not enter any data on Tab(3A or 3B).

    Tip: I will print nametags if you like. See #17 below.

13. **HOST EXPENSES:**

    At any time, use Tab(4) to log in any expenses and reimbursements for your event. It is already formatted to print. You are free to enter data or edit this page any way you like.

14. **PRINT MEAL COUPONS:**

    Print Tab(5) for Meal Coupons to go in guest envelopes. You may need to print multiple sheets, depending on how many of the Meal Coupons you need. The spreadsheet will tell you how many copies of each page you need for your event, based on the meal count you entered on Tab (1). Do not enter any data on Tab(5)

15. **PRINT ENVELOPE LABELS:**

    Print Tabs(6A or 6B) for envelope labels, depending on whether you want to print the "Group or Table" information on your labels. Do not enter any data on Tabs(6A or B).
    Tip: If you are using the "Group or Table" feature, exactly what you enter on Tab(1) in that column will print on the envelope labels. Go back to Tab(1) to make changes.

16. **EXPENSE REPORT:**

    Tab(7) is the expense report each host is expected to turn in with the checks after each event. Some of it is already filled in using data you entered on Tab(1). Enter the rest of the data and print the form, or send it electronically to the Treasurer.

17. **PRINTING HELP:**

    Ed Crane can print all Name Tags, Envelope Labels, Meal Tickets, Expense Report and other documents for you. Tab(8) is the table of contents for the package of printed documents you will receive from me. I suggest you have me do that. Just email me your spreadsheet a few days before an event. Note: If you want me to print stuff for your event it's always a good idea to let me know a couple weeks before the event just to be sure I'm going to be here.

    Contact info: marcoman357@aol.com or 239-537-1061

ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

Introduction

The purpose of this document is to provide guidance in using the "**Master Event, Name Tag & Expense Template**" spreadsheet. This is a smart Spreadsheet. It will do most of the work for you! All of the data entry is done on the first tab in the spreadsheet, called "**(1) ALL Data Entry**". Information is carried forward as needed to Tabs 2 through 4.

The second Tab, named "**(2) Names for Name Tags**", provides a printable list of names. It could be used as a check-in list, or any time the Host just needs a condensed list of who is attending the Event. This Tab is automatically generated from data entered on Tab (1). If you are an **Excel Power User** you can sort this information by LAST NAME to put Names in alphabetical order. Names tags will then print in that order as well.

Note that images used in the tutorial are from actual events and some fictitious events in order to better demonstrate what is required. Your template will be blank. ☹

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Step 1: How to download the spreadsheet

Please download a "fresh" copy of the spreadsheet for each event to make sure you have all the latest updates! Look in the upper left-hand corner of Tab(1) on the spreadsheet for the version number.   Make sure you have the latest.
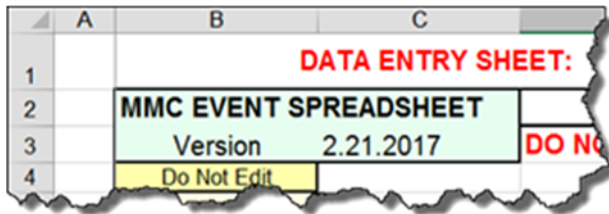
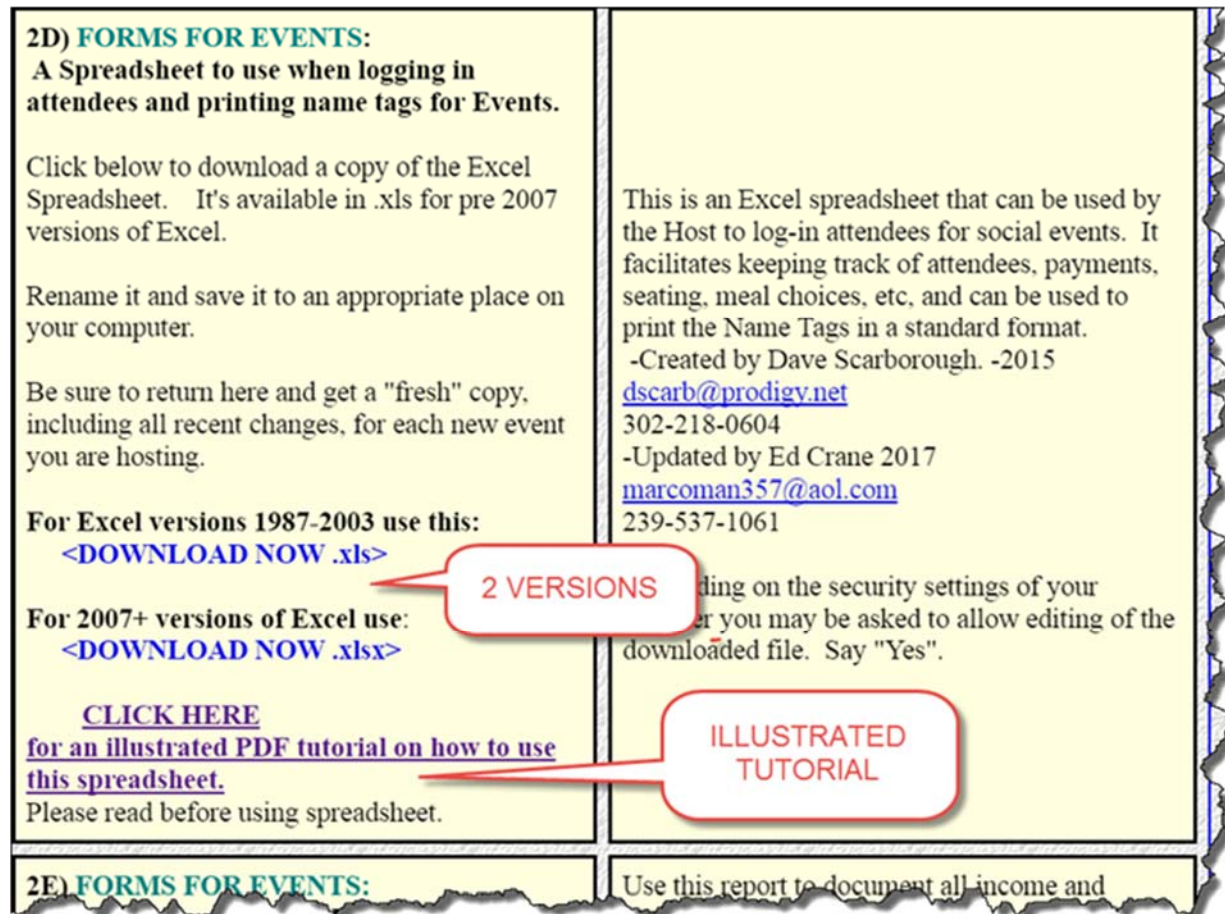1) Access the Marco Men's Club website. Follow this link:

http://marcomensclub.com/

Under the "Business" Drop Down menu at the top click on MMC OFFICIAL FORMS.

2) On the "OFFICIAL FORMS" page, click on "DOWNLOAD NOW" in box 2D to download a copy of the spreadsheet template to your computer. The spreadsheet is available in two versions (.XLSX & .XLS) to accommodate all versions of Excel. Below that is the link to this Tutorial. See screen capture below.

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# ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

2D) FORMS FOR EVENTS:
A Spreadsheet to use when logging in attendees and printing name tags for Events.

Click below to download a copy of the Excel Spreadsheet. It's available in .xls for pre 2007 versions of Excel.

Rename it and save it to an appropriate place on your computer.

Be sure to return here and get a "fresh" copy, including all recent changes, for each new event you are hosting.

For Excel versions 1987-2003 use this:
    <DOWNLOAD NOW .xls>

2 VERSIONS

For 2007+ versions of Excel use:
    <DOWNLOAD NOW .xlsx>

    CLICK HERE
for an illustrated PDF tutorial on how to use this spreadsheet.
Please read before using spreadsheet.

ILLUSTRATED TUTORIAL

This is an Excel spreadsheet that can be used by the Host to log-in attendees for social events. It facilitates keeping track of attendees, payments, seating, meal choices, etc, and can be used to print the Name Tags in a standard format.
-Created by Dave Scarborough. -2015
dscarb@prodigy.net
302-218-0604
-Updated by Ed Crane 2017
marcoman357@aol.com
239-537-1061

...ding on the security settings of your ...r you may be asked to allow editing of the downloaded file. Say "Yes".

2E) FORMS FOR EVENTS: Use this report to document all income and

3) **Immediately** rename the file you are downloading to something you will recognize by typing in a name of your choice and saving the file to a location on your computer that you are comfortable with.

Tip: It's a good idea to give the spreadsheet the same name as your event.
*For example: Change **"2017-Master EventNameTag_Expense_Template.xls"** to something more user friendly like **"Sweetheart Ball –Feb 2017"**. Spaces and most special characters are ok for file names. Try to keep it under 260 characters… ☺*

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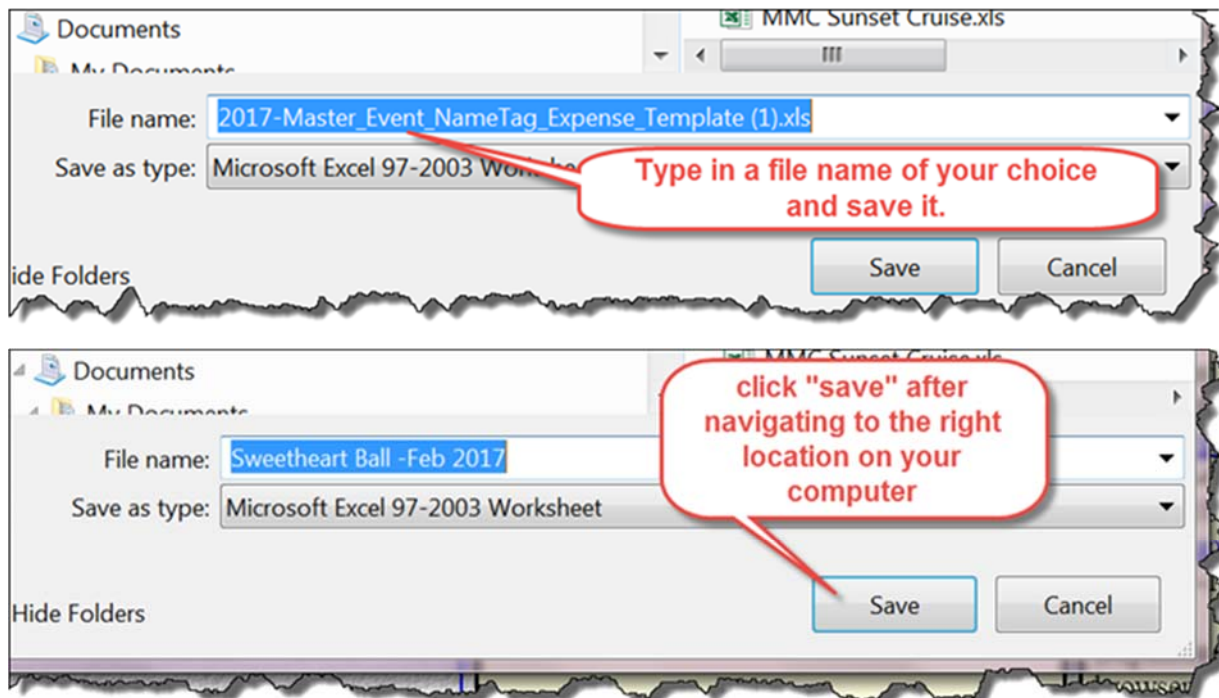
Renaming will make keeping track of the file a lot easier, and prevent overwriting it with anything else (like a fresh template being downloaded from the website…bummer)! There goes your data! ☹

Remember, you can at any time return to the website and download another "fresh" copy of the template. **You should always get a fresh copy for each new event you host.** The Template will be updated and improved as users provide feedback. Look in the upper left-hand corner of the first tab, "(1) All Data Entry", for the spreadsheet version number. You should always use the latest one.

Tip: Damage control
If you type things on tabs (2) and (3) where you were told not to you will have screwed up the complex formulas that make this spreadsheet work. If you caught your mistake in time you can use the "BACK" arrow to step back as many as 16 entries. If that doesn't solve the problem, you can download a fresh copy of the spreadsheet from the MMC website. Then COPY (DO NOT CUT) all the data on TAB(1) from your damaged spreadsheet to the new one, and you are back in business.

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Step 2: Setting up the Spreadsheet for your event

A) Open up your renamed copy of the spreadsheet that's now on your computer and click on the first Tab, "**(1) ALL Data Entry".** All data is entered here!
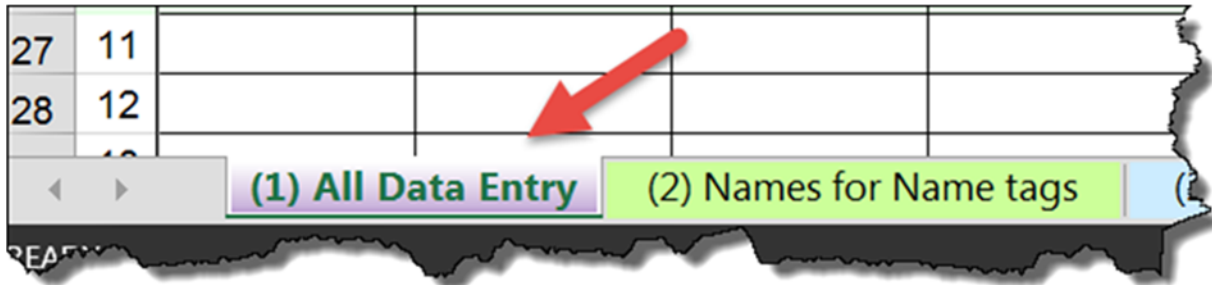
B) See screen capture below. The first thing you need to do is to enter SIX data items, none of which are too challenging. ☺ They describe the event and are:

    (1) THE EVENT NAME (as you would like it to appear on the name tag)

    (2) THE MEMBER CUT OFF DATE.

Enter date in format (month-day-year), for example February 14, 2017 would be entered 2-14-17.

Tip: If the date is in the current calendar year you only have to enter the month and day. The computer will fill in the year. Example: enter 2-14 for above.

    (3) THE DATE THE EVENT WILL BE HELD.

Tip: For multi-day events just use the starting date, in the same format as above.

    (4) THE COST PER PERSON FOR A MEMBER PAYING ON TIME.

    (5) THE MAXIMUM NUMBER OF ***PEOPLE*** THE EVENT CAN ACCOMMODATE.

    (6) THE NAME OF THE EVENT HOST.

Tip: Most likely, this is you! Unless you are the spouse with better IT skills, and are doing this for Hubby? ☺

See screen capture below.

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Tip: If your event has meal choices you may enter different names in the meal columns. Perhaps you want to change "BEEF" to "PRIME RIB" and add "PASTA"? Make any changes you like. After all, it's your spreadsheet now! You can also right click a cell, and click "Clear Contents" to erase the content of that cell. Without messing up the formatting.
Do NOT use the "CUT" command.

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STEP 3: Yea! Set up is done! Now log in your Event's attendees.

That's it! The spreadsheet is all set up for your event! Now as the checks come in you can log in the attendees by name, phone number, group or table info, number of guests, the date you received the reservation, the check number, amount paid, etc. There is also a provision for a **WAIT LIST** at the end.

								Total CK		Eac
								# of checks	Total	
	This Form is for 200 people max.									
	To resize names, change GROSSMAN to Grossman									
	DO NOT SORT THIS PAGE -Sort Tab (2) instead,			event totals =>	15	Format: mo-da-yr	7	$750.00		
	Names				Number Of Attendees	Date Reservation Received	Check Number	Amount Paid		
Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group	Phone Number					B
1	ED		CRANE	A		1	01/07/17	12345	$150.00	
2	CINDY		LIPE-CRANE	A		1	01/07/17			
3	MAUREEN		WELCH	A		1	01/07/17			
4	LEE	DOTTIE	HENDERSON			2	01/12/17	227	$100.00	
5	DAVE	SUSIE	WALSH	A		2	01/17/17	8364	$100.00	
6	RANDLE	SUZANNE	GROSSMAN			2	01/22/17	548574	$100.00	
7	ROB	DONNA	REILEY	B		2	01/27/17	62514	$100.00	
8	MIKE	LINDA	LEVINE			2	02/01/17	98745	$100.00	1
9	JOHN	JANE	DeMADO	B		2	02/06/17	25487	$100.00	

ERROR CHECKING: The spreadsheet will keep track of the money as you type by checking each line. If the amount of the payment does not equal the price per person times the number of people, a red "**?**" will show up in the column next to the amount paid. Next to that the $$ discrepancy will be displayed, **green** for overpayment, **red** for under payment.

MEAL SELECTION: If your event has a meal selection change the column headings for your event. It's sufficient to know that a "couple" is having "Beef" and "Chicken". They can figure out who wants to eat which! ☺
Totals of each column are displayed above the column description. Remember, all data entry is done on this Tab!

If the number of meals selected does not equal the number of attendees, error messages are displayed. Each line that has a problem is flagged, and the error is displayed. Green for too many meals; Red for not enough.

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GROUPING FEATURE: See Appendix Three for details on this optional feature. Some Hosts may find it useful to create groups for attendees for several different reasons, such as:

1) The member's spouse or significant other has a different last name, and their reservation takes up two lines. If you plan to sort the data on Tab (2) so that last names are in alphabetical order this reservation may be "broken up"

2) The host may allow guests to request seating arrangements where folks can sit with their friends.

3) A member may bring guests. This feature allows you to "group" the party together.

The big advantage is that the check-in list will have this information and the name tags will print by "group".

See Appendix Three for the details on how to do this.

PLEASE DO NOT ENTER OR EDIT INFORMATION ON TABS (2) & (3)!
It is OK to sort data on Tab (2) in order to put the list of names in alphabetical order by last name.

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Step 4: Tips and important suggestions

1) The general flow when using this spreadsheet is as follows:

    a) Enter all data on the first tab, labeled "(1) All Data Entry". Create "Groups" to preserve the integrity of your data. (See Appendix Three)
DO NOT SORT THE FIRST TAB "(1) All Data Entry"

    b) Sort the attendees' information on the second tab, labeled "(2) Names for labels". (See Appendix Two for help on Sorting)   The objective is to sort the attendees alphabetically and into groups, in preparation for printing the name tags. Do not include blank lines in the sort range. You may also print this page to provide an abbreviated list of attendees. It is already formatted for printing, and makes a good check in list for the event.

    c) Repeat steps a) and b) as often as needed, especially after adding new reservations to Tab (1).

    d) Go to tab (4) "Host Expenses" at any time, whenever you need to. The page is already formatted to print.

    e) When the event is close and the data on Tab (2) looks the way you want it to, go to tab (3) and print Name Tags (See Appendix One). It's not a bad idea to print a page or two to plain paper to see how they look. Note that there's two tab (3)'s. These have slightly different formats to handle some printer variations. Compare your printout on plain paper to a blank sheet of labels. You should avoid printing labels on expensive label blanks until you are sure it's right.

2) The spreadsheet automatically does some error checking. For example, as you enter meal selections the spreadsheet compares the number of meals selected against the number of attendees, line by line. Below is an event with 6 attendees. Please take note of the column labeled "Flag". These cells "light up" if you have too many meals (green), or not enough meals (red), line by line.
For example, on the first reservation there's only one meal selection. There

should be two, so this reservation is short one meal. The second entry is correct, while the third has an extra meal. The host will need to resolve these issues.

Number Of Attendees	Date Reservation Received	Check Number	Amount Paid	Beef	Chicken	Fish	Duck	Veg	??	Flag
		# of checks	Total $150.00						Total Meals 6	
6	Format: mo-da-yr		ok		2	2	2			
2	02/01/17		$50.00		1					-1
2	02/05/17		$50.00			1	1			
2	02/10/17		$50.00		1	1	1			1

Everyone has paid
Check Flag: Red = short meals; Green = excess meals
yes (7) Menu for this event? Enter Yes
Menu Selection (if available for the event)

NOTE

SHORT ONE MEAL

OK

ONE EXTRA MEAL

3) The spreadsheet also helps to keep track of the money. See illustration below. In this example, 4 people have signed up for an event that costs $25 each. But the checks only total $75, a shortage of $25. The Host will need to resolve this.

Number Of Attendees	Date Reservation Received	Check Number	Amount Paid		
		# of checks 2	Total $75.00		
4	Fo...		($25.00)		Chicken
2	02/01/17	1234546	$50.00		
2	02/10/17	465698	$25.00		

NUMBER OF ATTENDEES.

Cash / People # Cost Per / Person

Meal

AMOUNT COLLECTED.

AMOUNT SHORT.

There are a number of reasons this might occur:

a) The host and hostess are likely shown as attending, but may be subsidized up to $100 per event.
b) There may be guest charges for some of the more popular events.
c) There may be late charges for attendees signing up after the cutoff date.

The spreadsheet draws attention to the discrepancy by comparing the amount collected to the number of attendees times the event cost, but cannot resolve the issues. The Host will likely be aware of any unusual situations and can rationalize the discrepancy.

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Step 5: Printing the Name Tags

Go to spreadsheet tab,"**(3A or 3B) Print Name tags**".

All of the information from Tab (2) has been transferred to your Name Tags. If you sorted the names on Tab (2) the Name Tags will be printed in that order. If you chose to use the "group/table" function and sorted, the groups' name tags will be printed on the last sheets, with members of the group in alphabetical order.

DO NOT EDIT ANYTHING ON THIS SHEET or change **column** or **row** dimensions, or **margins**. If you do, the name tags will not print properly, and you will invalidate the warranty! ☺☹ Scroll down on the spreadsheet to ensure that the Name Tags are going to look the way you want them to look before printing. (Blank label sheets are expensive!).

Tip: Make sure the Name of your event is not so long that it overruns the name tag width. DO NOT CHANGE THE WIDTH OF THE COLUMNS on Tab (3A or 3B). They are optimized for printers & the labels specified. The labels don't get bigger just because you changed the width of the spreadsheet column!! ☹ Go back to Tab (1) and shorten your event name as required. Return to Tab (3) and see how it looks.

Tip: A simple way you can shorten any text is to use lower case letters for part of the name. Lower case letters typically take up less space.

Example:

MARCO PRINCESS DINNER CRUISE

is longer than

Marco Princess Dinner Cruise.

All changes must be made on Tab (1) to avoid overwriting formulas on Tab (3).

On Tab (1) just retype the event name in Box #1 using the lower case letters.

Return to tab (3) to see how it looks.

The same applies to Names. Make sure peoples' names look good on the name tags. In some rare cases a person's name may be larger (longer) than the allotted space on the Name Tag Blank. The best way to fix this is to use a mixture of CAPs and lower case letters, as discussed above, to make the name smaller.

Changes must be made on Tab (1), **"All Data Entry"** to avoid overwriting formulas on Tab's (2), (3) & (4).

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Now you are almost ready to print the Name Tags.

Tip: Many printers default to printing the last page first. Left unchecked, this will print 200 Name Tags (about 25 PAGES of labels!), starting with page 25. You do NOT want to start the print job on the last sheet, or you will likely print a lot of blank sheets of Name Tags! See APPENDIX ONE for some advice if you are not familiar with how to adjust the print range.

Use Excel's **Print Preview (See APPENDIX ONE, if necessary)** to see how this will look when printed, and to adjust the number of sheets to print. If you like, you can print The Name Tags to regular printer paper to see how they will look.

Follow these steps to print the Name Tags:

(a) Load your printer with the correct blank Name Tag sheets
(Use Avery 5395 labels, or the equivalent, but expensive, SICURIX # 67651 labels).
Depending on your printer, you may have to print this one sheet at time.
(b) Using Print Preview, adjust the print range to only print the pages needed for your event. (See **APPENDIX ONE** for help if needed)
(c) Print Spreadsheet Tab "**(3) Print Name Tags**". The page is already set up and formatted to print. There are two slightly different formats, Tabs 3A & 3B. Try them to see which works best for your printer.

DO NOT ATTEMPT TO CHANGE THE PRINT FORMAT, MARGINS, ROWS OR COLUMN WIDTHS! Printing is optimized for the name tag labels specified.

Tip: The preferred name tag label is Avery 5395, available from Amazon.com with free Prime shipping, and 2 day delivery, for less than $30/box of 400 Name Tags (50 sheets). Follow this link:
https://www.amazon.com
*Search for "*Avery 5395 adhesive name badges*"*

The cost of these labels is less than 8 cents per name tag. Be careful of other labels that seem similar. A slight change in size or placement of the labels on the sheet will cause the printing to be off. If in doubt, just load one sheet of your labels into your printer and try it. Or print to regular paper and compare to a blank label sheet.

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The MMC stocks these labels. Contact the current Senior Vice President to get a supply. Follow this link to see who the current SVP is, and how to contact him: *http://marcomensclub.com/officers.htm*

Tip: Only as a backup, the SICURIX labels can be purchased from this website for about $35 for 200 Name Tags (that's 25 sheets with 8 name tags per sheet, or about 18 cents/label).

http://www.sicurix.com/sicurix-r-plain-white-adhesive-badges-8-per-sheet-200-pack-white/

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STEP 6: Host Expenses (optional)

The 4th tab in the spreadsheet, "**(4) Host Expenses**", provides a place for the Host to record his personal expenses related to the event, and subsequent reimbursements from MMC. Information about this event from Tab (1) is carried forward to this Tab. You only have to enter the expense and reimbursement information. You may print a copy for your records.

Please provide feedback to me if you encounter problems with this Tutorial or the Spreadsheet. Or if you have suggestions for improvement.

Ed Crane
239-537-1061
MarcoMan357@aol.com
Please contact me if you have questions of comments.

Credits:

Dave Scarborough originally created this spreadsheet in 2015. I've added this tutorial and enhanced his original spreadsheet. -Ed

See **APPENDIX ONE**, **TWO** or **THREE** below for more information intended for Excel Power Users with a good working knowledge of Excel.

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APPENDIX ONE: SETTING THE NUMBER OF PAGES TO PRINT

Most versions of Excel have some type of "Page Set Up" or "Print Preview" function for printing documents. These will allow you to set the specific pages you want to print. Here's an example from the 2013 version of Excel.

Start by going to "FILE" in the upper left hand corner of the spreadsheet, or using the handy "Print Preview and Print" icon if you have it in your tool bar.
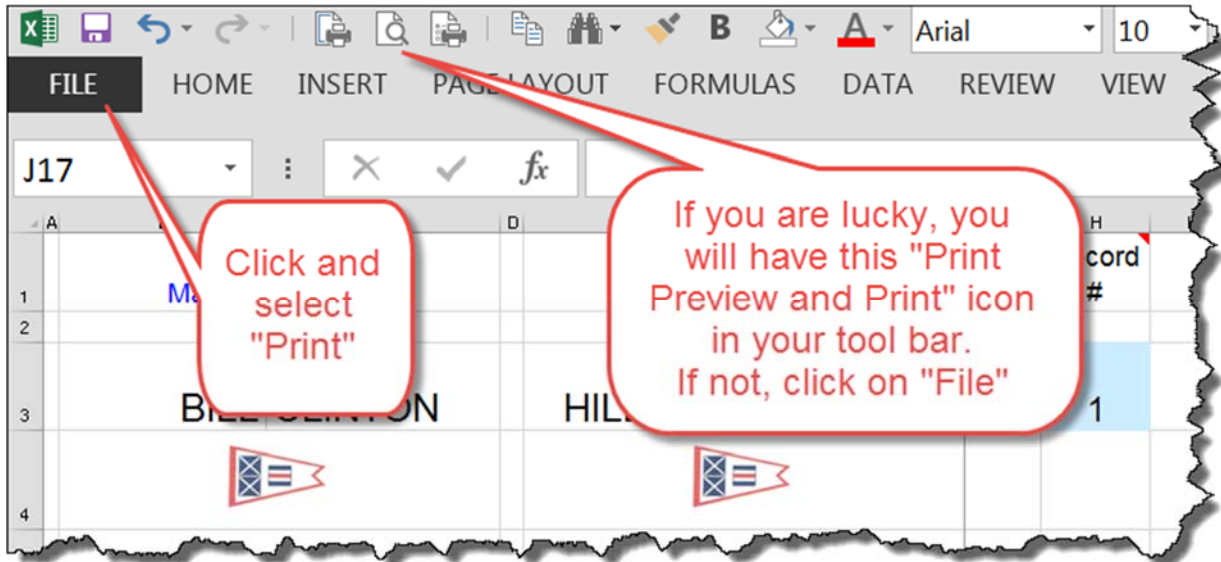
Tip: Avoid clicking either icon to the left or right with the little printer symbol. These are for setup features that should not be used on this Tab.

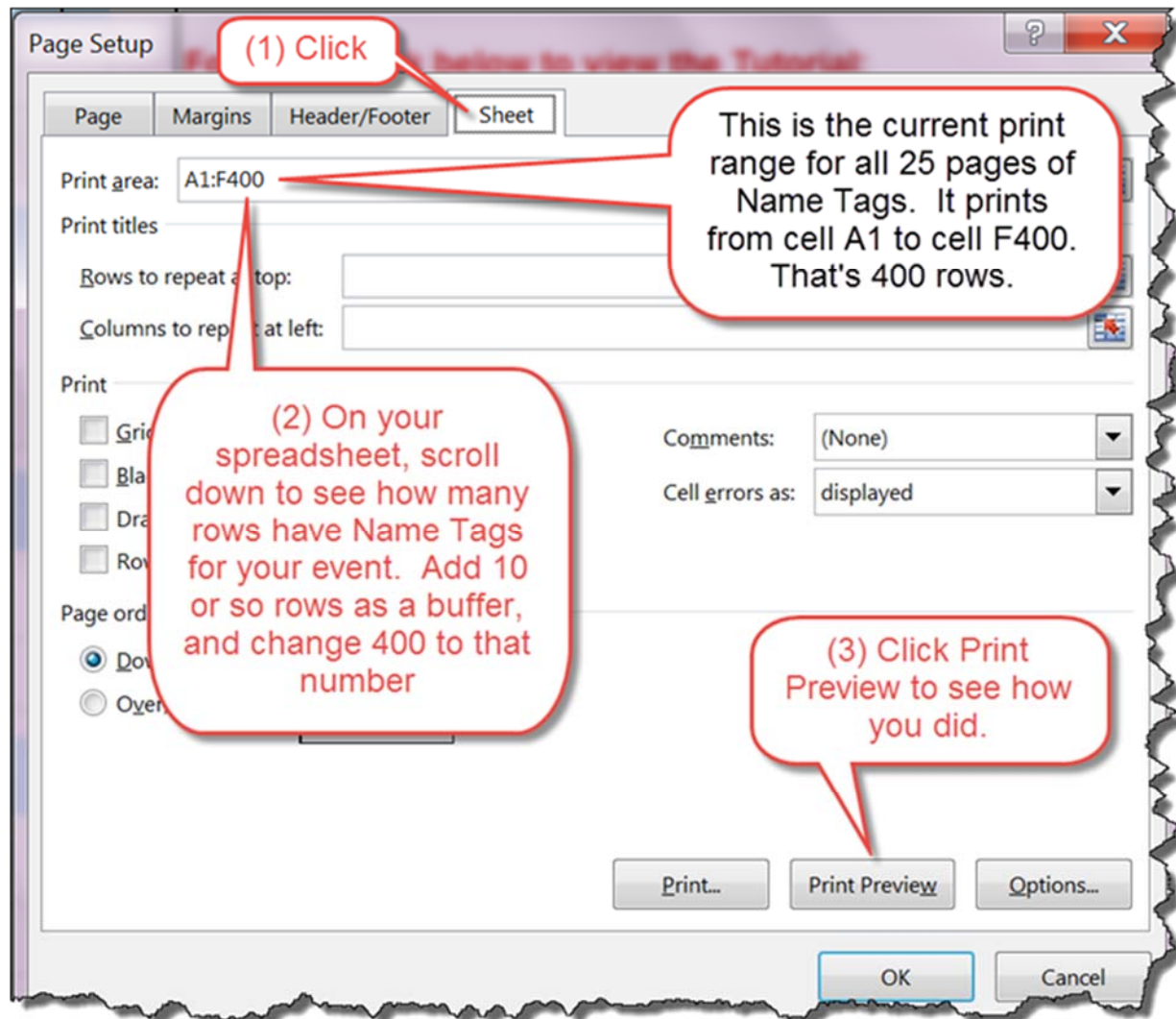**ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET**

This is the Print Set Up screen in Excel 2013.
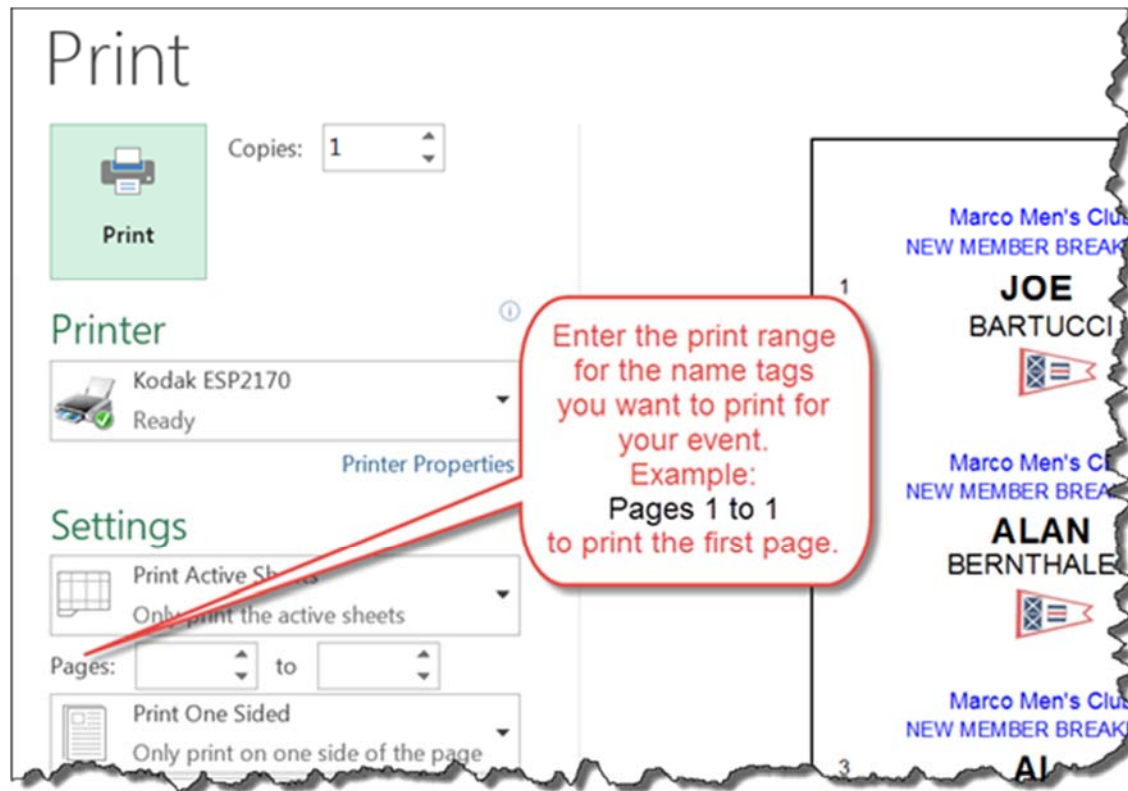
See next page for older versions of Excel.

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In older versions of Excel you may encounter a Page Setup screen that looks like this:

After adjusting the print range look at the last label to be printed and make sure you have included all attendees.

****END OF APPENDIX ONE****

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APPENDIX TWO: HOW TO SORT DATA

Update: A "Group or Table" function was added to the spreadsheet. It effects the sorting discussion in the section. See Appendix Three for details.

DO NOT SORT THE FIRST TAB "(1) All Data Entry".

Go to Tab "(2) Names for Name Tags" for all sorting!

Why? Because it is important to preserve the order that the data was entered on Tab (1). Suppose you have a member whose wife users her maiden name, and they have invited another couple, their best friends, as guests. Your data entry might look something like this below. One check covers 4 people. If you sort this with all the other names these 3 lines will get scattered all over the place. It will look like Cindy and our "Best Friends" are deadbeats who did not pay!!!

	To resize names, change GROSSMAN to Grossman						# of checks	Total	No
				event totals =>	6	Format: mo-da-yr	2	$138.00	Me
	Names			Phone	**Number Of**	**Date Reservation**	**Check**	**Amount**	
	Member or Guest First Name	**SO or Guest First Name**	**Last Name**	**Number**	**Attendees**	**Received**	**Number**	**Paid**	**Beef**
1	ED		CRANE	537-1061	1	02/10/17	1234	$92.00	
2	CINDY		LIPE		1				
3	ROB	DONNA	BestFriends		2				
4	DAVE	SUSIE	WALSH		2	02/12/17	4567	$46.00	
5									
6									

Tab (2) will look like this after sorting the last names in alphabetical order. Note that the group (Crane-Lipe-BestFriends) has been broken up. Tab (1) remains unchanged and the order of entry preserved.

	LIST OF GUESTS USED TO GENERATE NAME TAGS						
	Event Name:		**DAVES EVENT**				
	Host:	**DAVE WALSH**	**Number of attendees:**	6	**Event Date:**	02/28/17	
	Member or Guest First Name	**SO or Guest First Name**	**Last Name**	**#**	**Check In**	**NOTES**	
1	ROB	DONNA	BestFriends	2			
2	ED		CRANE	1			(1) E
3	DENNIS	ANN	FARUOL	2			it wi
4	CINDY		LIPE	1			(2)
5							

Names tags will now print in alphabetical order. The host may have to refer back to Tab (1) in order to pair the Crane-Lipe couple, and put their name tags into the correct envelop.

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All versions of Excel provide some means of sorting data. These screen shots are from Excel 2013. Yours may look different, but the concept remains the same.

Sorting is easy, but you have to be careful! "SORT" has the power to royally screw up your spreadsheet.

Here's the basic steps:

1) Select the data range (rows and columns) to sort. It's a good idea to include the first row if that row has headers for the columns. You will be asked the question "Do you have a header". Answer "yes" or check the box and the header will not be included in the sort. It will stay at the top.

2) Click on SORT and set up your sort parameters. This is easier if you included the headers in step 1 above. You can have sorts within sorts within sorts. There's probably some practical limit, but I haven't reached it yet.

3) Sort the data

It's really that easy. Now let's look at an actual example, sorting data in this spreadsheet.

Caution: Remember: DO NOT sort data on Tab 1
Tab (2) automatically copies the names from Tab (1).

	Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group or Table	#	Check In	Payment	Error ?
		LIST OF GUESTS USED TO GENERATE NAME TAGS & ENEVELOPE LABLES.							
		Event Name:		Enter Event Name on TAB 1					
		Host:	Host from TAB 1	Number of attendees:					
1		ED	CINDY	CRANE	TABLE 17				
2		DAVE	SUSIE	WALSH	TABLE 22				
3		JOE	BETTY	SMITH	TABLE 12				
4		ROB	DONNA	REILEY	TABLE 22				
5		RANDLE	SUSANNE	GROSSMAN	TABLE 25				
6		SILKY	KATHY	SULLIVAN	TABLE 12				
7		BILL	ANDY	JONES	TABLE 25				
8									
9									

This provides a manageable amount of data to sort, as opposed to all the information on Tab(1) and results in a usable 2 page printout of this information, in alphabetical order by last name.

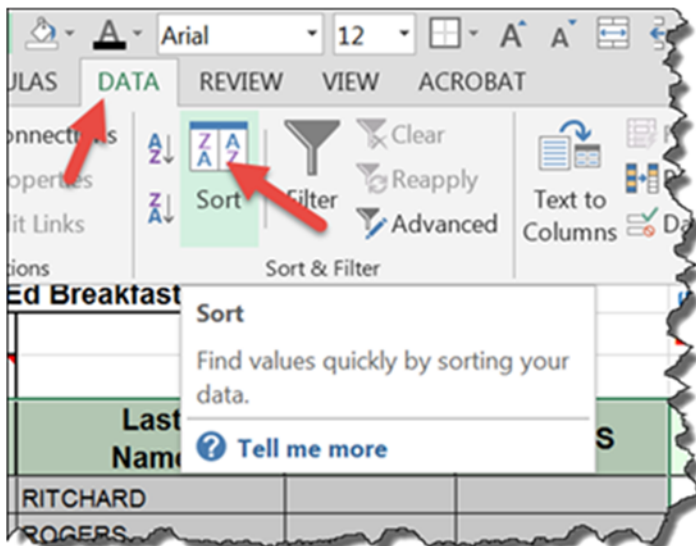# ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

See Appendix 3 for more info on the "Group or Table" option.

Here's the process, from Excel 2013:

1) Select data to be sorted in columns A through L, starting with row 6 (the header), and continuing down to, but not including the first blank row.
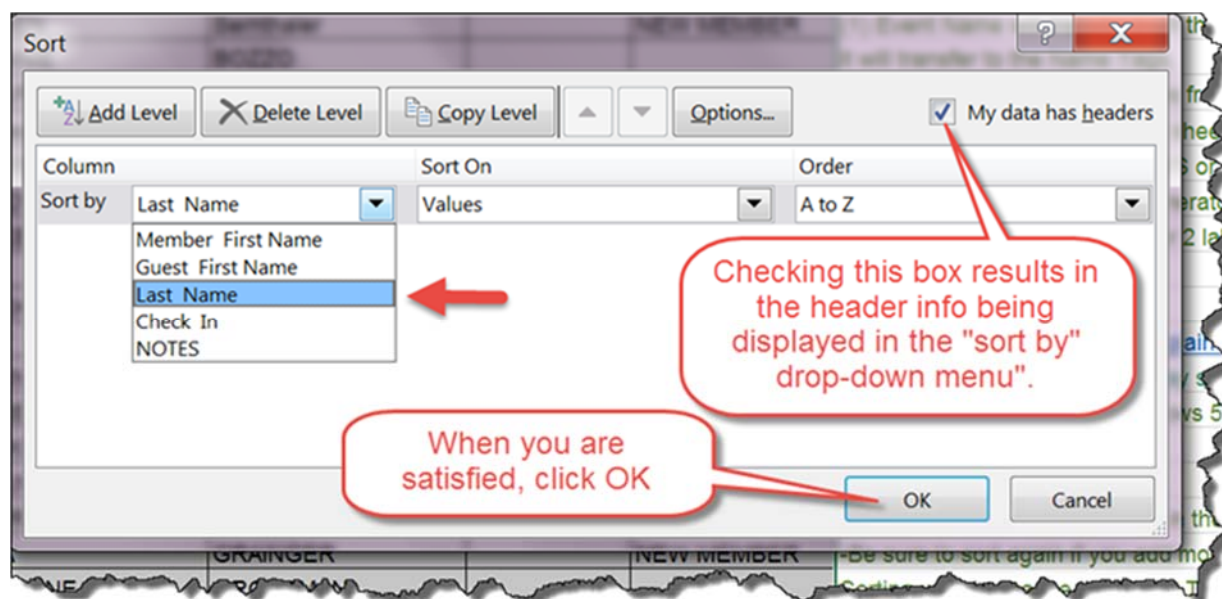
	Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group or Table	#	Check In	Payment	Error ?	Amount	Notes
7	1	ED	CINDY	CRANE	TABLE 17						
8	2	DAVE	SUSIE	WALSH	TABLE 22						
9	3	JOE	BETTY	SMITH	TABLE 12						
10	4	ROB	DONNA	REILEY	TABLE 22						
11	5	RANDLE	SUSANNE	GROSSMAN	TABLE 25						
12	6	SILKY	KATHY	SULLIVAN	TABLE 12						
13	7	BILL	ANDY	JONES	TABLE 25						
14	8										
15	9										

2) Click on "DATA/SORT" in the tool bar.

3) Set up sort parameters. In this case, a simple one level A to Z alphabetical sort on last names.

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Here's what you get:

Tip: If you do not include the header in the sort, the drop down menu shown above will list columns A, B, C, D, E & F. You would select D. Not very intuitive? ☺

Make sure that the "Sort On" selection is set to "Values" and the "Order" selection is set to "A to Z". Then click "OK". That's it! You are done!

*Tip: **VERY VERY IMPORTANT!** Before you type anything else, look at your data. Did you accomplish what you wanted? Everything look OK? IF NOT, you can recover simply by backing up one step (ie to before you sorted) by using the*

ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

"Undo" command.   You can UNDO the last 16 commands!!
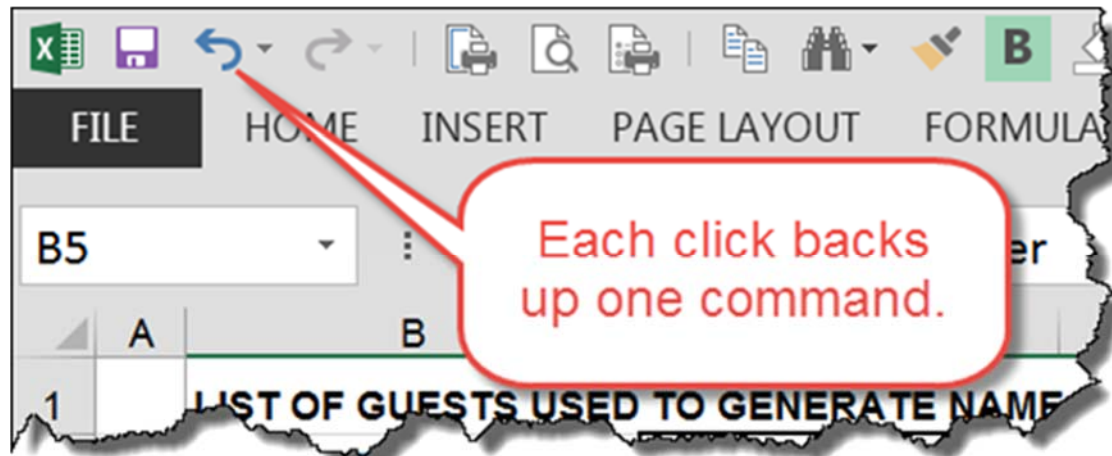
Click once to "undo" the sort. Now rethink it and try again.

Tip: Excel amazingly takes care of all the book keeping. Everything, including all formulas, tracks the sort. (See Caution below.) Take a look at tab (3). All the labels will now also be in alphabetic order.

You can continue to add names on Tab (1). They will show up at the bottom of your sorted data. Just sort again to include the new data, and all will be well.

Example: After sorting, I went back to Tab (1) and added one more couple, Bob and Betty Smith. They immediately show up on Tab (2) below my sorted data.

Never enter data directly on Tab (2)!! See screen capture below. If I include them in a re-sort, they will be put in the right order, and you can then continue adding new names on Tab (1). You can re-sort at any time.

45	JOE	CAROL	VARANO		
46	MARK	CINDY	VIERKANT		NEW MEMBER
47	TODD	JULIE	WHITNEY		NEW MEMBER
48	BOB	BETTY	SMITH		
49					
50					
51					

****END OF APPENDIX TWO****

ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

APPENDIX THREE: HOW TO USE THE "GROUP or TABLE" OPTION

Some Hosts may find it useful to create groups for attendees for several different reasons, such as:

a) The member's spouse or significant other has a different last name, and their reservation takes up two lines. If you plan to sort the data on Tab (2) so that last names are in alphabetical order this reservation may be "broken up"

b) The host may allow guests to request seating arrangements where folks can sit at the same table with their friends. Whatever you enter in the column can be automatically printed on the envelope labels to help guests find their table.

c) A member may bring guests. This feature allows you to "group" the party together.

Here's what tab(1) might look like.

Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group or Table	Phone Number
	This Form is for 200 people max.				
	To resize names, change GROSSMAN to Grossman				
	DO NOT SORT THIS PAGE -Sort Tab (2) instead,			event totals =>	
	ENTER DATA FOR ALL ATTENDEES BELOW (Scroll up to start on row row 1)				
1	ED	CINDY	CRANE	TABLE 17	
2	DAVE	SUSIE	WALSH	TABLE 17	
3	JOE	BETTY	SMITH	TABLE 12	
4	ROB	DONNA	REILEY	TABLE 22	
5	RANDLE	SUSANNE	GROSSMAN	TABLE 22	
6	SILKY	KATHY	SULLIVAN	TABLE 12	
7	BILL	ANDY	JONES		
8					

It doesn't make any difference which line the attendees are entered on.   When you are ready, go to tab (2) to sort the data. Sorting will put all the groups (Tables in this case) in order alphabetically.   See Appendix Two if you are not comfortable with Excel sorting.

Never, ever, enter data directly on Tab (2)!! You will over write the formulas that make all this work.

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Now let's sort Tab(2) first by "Group or Table", and then, alphabetically, by Name. The "Data/Sort" function is already set up to sort by "Group or Table" and then "Last Name". Here's the result:

|	Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group or Table	#
4		Event Name:	**Enter Event Name on TAB 1**			
5		Host:	**Host from TAB 1**	**Number of attendees:**		
6						
7	7	BILL	ANDY	JONES		
8	3	JOE	BETTY	SMITH	TABLE 12	
9	6	SILKY	KATHY	SULLIVAN	TABLE 12	
10	1	ED	CINDY	CRANE	TABLE 17	
11	2	DAVE	SUSIE	WALSH	TABLE 17	
12	5	RANDLE	SUSANNE	GROSSMAN	TABLE 22	
13	4	ROB	DONNA	REILEY	TABLE 22	
14	8					
15	9					

This spreadsheet is already set up to sort by Group and Last Name. It's not a problem if there are no groups. You will just get an alphabetical list by last name. Furthermore you can add to, or change, groups at any time **on Tab (1) only**, and sort Tab(2) again. For example, suppose the Grossman's want to join the Jones at a new table, and the Walsh's want to sit at the Reiley table? Make the changes on Tab(1). Then go to Tab(2) and resort. Here's what you get on Tab (2) after sorting.

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	Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group or Table	#	Check In
3		LIST OF GUESTS USED TO GENERATE NAME TAGS & ENEVELOPE LABLES.					
4		Event Name:	Enter Event Name on TAB 1				
5		Host:	Host from TAB 1	Number of attendees:			
7	3	JOE	BETTY	SMITH	TABLE 12		
8	6	SILKY	KATHY	SULLIVAN	TABLE 12		
9	1	ED	CINDY	CRANE	TABLE 17		
10	4	ROB	DONNA	REILEY	TABLE 22		
11	2	DAVE	SUSIE	WALSH	TABLE 22		
12	5	RANDLE	SUSANNE	GROSSMAN	TABLE 25		
13	7	BILL	ANDY	JONES	TABLE 25		
14	8						
15	9						

You might print this, since it provides a clear record of who is sitting at which table, and quickly identifies problems (like 10 people at an 8 person table!).

The Name Tags and Envelope Labels are going to print in this order as well! That may not be what you want. In that case, sort again, after deleting the first level of sorting. Select the "Sort by Group…" line and click "Delete Level". See screen capture above.
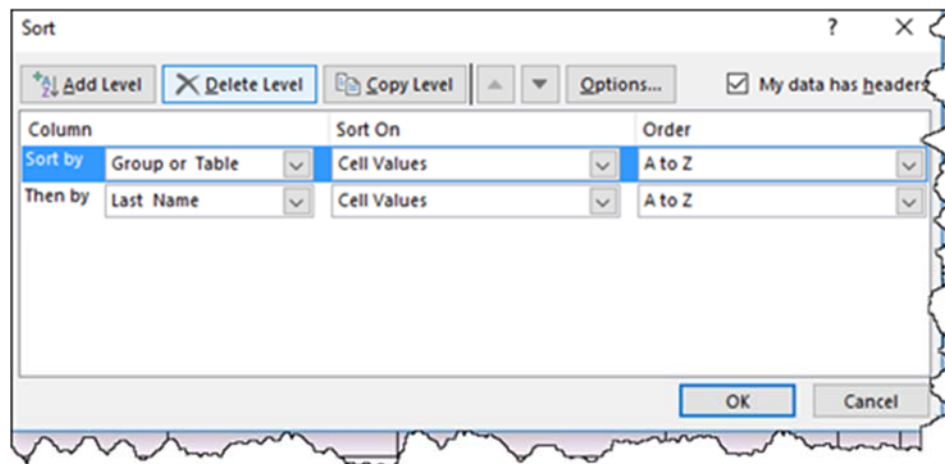
Resort Tab(1) and you get. All data is back in order by last names. Name Tags and Envelope Labels will print in alphabetical order.

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	Row #	Member or Guest First Name	SO or Guest First Name	Last Name	Group or Table	#	Check In
4		Event Name:	Enter Event Name on TAB 1				
5		Host:	Host from TAB 1	Number of attendees:			
7	1	ED	CINDY	CRANE	TABLE 17		
8	5	RANDLE	SUSANNE	GROSSMAN	TABLE 25		
9	7	BILL	ANDY	JONES	TABLE 25		
10	4	ROB	DONNA	REILEY	TABLE 22		
11	3	JOE	BETTY	SMITH	TABLE 12		
12	6	SILKY	KATHY	SULLIVAN	TABLE 12		
13	2	DAVE	SUSIE	WALSH	TABLE 22		
14	8						

BOUNDARY FOR COLUMNS

# ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

1

TABI

TAGS

NAME

Marco Men's Club
Enter Event Name onTAB 1
ED
CRANE

Marco Men's Club
Enter Event Name onTAB 1
CINDY
CRANE

2

TABI

Marco Men's Club
Enter Event Name onTAB 1
RANDLE
GROSSMAN

Marco Men's Club
Enter Event Name onTAB 1
SUSANNE
GROSSMAN

3

TABI

Marco Men's Club
Enter Event Name onTAB 1
BILL
JONES

Marco Men's Club
Enter Event Name onTAB 1
ANDY
JONES

TAGS

4

TABI

NAME

Marco Men's Club
Enter Event Name onTAB 1
ROB
REILEY

Marco Men's Club
Enter Event Name onTAB 1
DONNA
REILEY

NAME TAGS

ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET

Pg
1

1

LABELS

Marco Men's Club-1
Enter Event Name onTAB 1
CRANE
ED
CINDY
TABLE 17

Marco Men's Club-2
Enter Event Name onTAB 1
GROSSMAN
RANDLE
SUSANNE
TABLE 25

2

Marco Men's Club-3
Enter Event Name onTAB 1
JONES
BILL
ANDY
TABLE 25

Marco Men's Club-4
Enter Event Name onTAB 1
REILEY
ROB
DONNA
TABLE 22

3

ENVELOPE

Marco Men's Club-5
Enter Event Name onTAB 1
SMITH
JOE
BETTY
TABLE 12

Marco Men's Club-6
Enter Event Name onTAB 1
SULLIVAN
SILKY
KATHY
TABLE 12

4

Marco Men's Club-7
Enter Event Name onTAB 1
WALSH
DAVE
SUSIE
TABLE 22

Marco Men's Club-8
Enter Event Name onTAB 1

ENVELOPE LABELS w TABLE #'S

Tip: If you change the sort character from letters to table numbers you may see this dialog box when you sort:

ILLUSTRATED INSTRUCTIONS FOR USING THE EVENTS SPREADSHEET
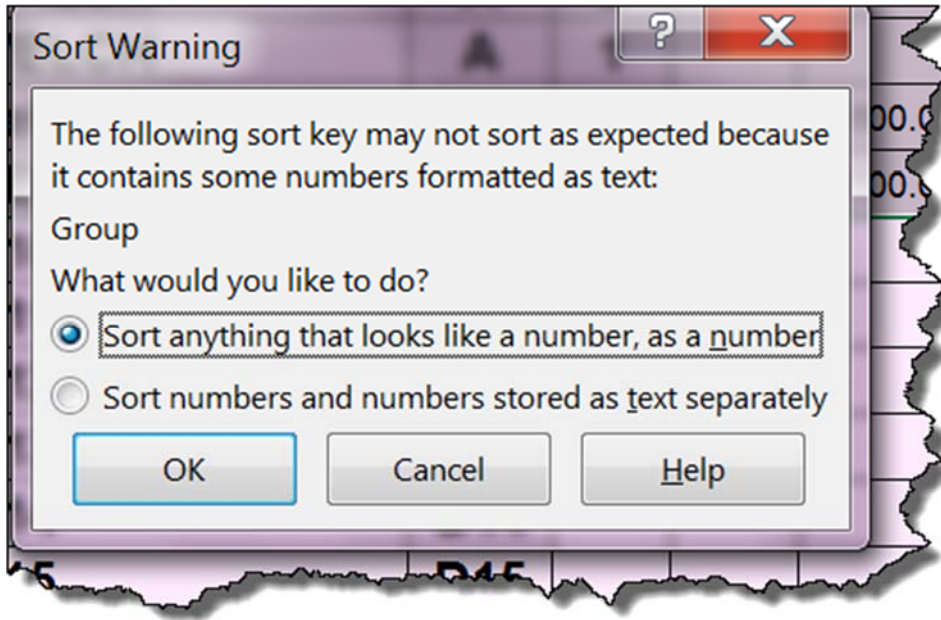
Just select the first option (the default) and click OK.

****************End of APPENDIX Section**************** ☺