



TES: Entry Conformation at Registration.

Background

To ensure that competitor-provided information provided at the time of entry is still current, thus ensuring TES information is correct at the time of the first race, organisers should issue each competitor with a single-page summary of their current information, and request conformation. This document describes how TES can produce a summary for each competitor using Microsoft's Mail-merge utility.

Such changes include last minute

- Crew changes
- Sail numbers
- Contact numbers
- Etc.

The updated information is to be loaded into TES **prior to** the TopYacht Step 6a operation to download the entry list into TopYacht's database.

Prerequisites

- Microsoft Office
- TES used for Entry Management
- TopYacht Staff enabling the **Entry Conformation Report** at Event Set-up time

Entry Conformation

Log in to the event as the TES Administrator.

To assist with the administration of the event we have provided an Event Wide report called **Entry Conformation**. This creates an Excel spreadsheet with all relevant details. *Alternately* it will usually be "**Rep 1**" if you have a single Series.... Thus

Note that hovering over the icon will display a popup with the report title, being Show Conformation in this instance.

The screenshot shows the TopYacht interface for the 'International Etchells Class 2012 World Championship' (16~25 Feb). A navigation menu includes 'Login >> Series Entrants >> Utils >> Event Reports >> Hcer Menu >> Boats >> Sailors >> Log Out'. Below the menu, it states 'Currently there are 75 competitors entered for this event.' A table lists competitors with columns: SERIES NAME, ENTRANTS, CONTACTS, EDIT, Ent Paid, Cas Paid, Check List, EMAIL, SMS, TY Report, Rep 1, Rep 2. The first row is for 'Etchells' with 75 entrants. The 'Rep 1' icon in the table is circled in red.

SERIES NAME	ENTRANTS	CONTACTS	EDIT	Ent Paid	Cas Paid	Check List	EMAIL	SMS	TY Report	Rep 1	Rep 2
Etchells	75 (cas 0/0)										

To Mail Merge this to make Entry Confirmation forms..

This will mail merge with the XLS and provide forms that you can hand out at registration AND get back immediately with any last minute changes.

You can jazz it up with logos, headers and a more comprehensive declaration for them to sign.

If you then use the **admin >> edit** facility in TES, you can update each entry before you import the data into TopYacht to produce results.

TopYacht has created some generic [Templates](#) for routine use. The user can make their own, or modify an existing one to suit the particular event

Output

The merge produces an output WORD document with one individual entry per page. Print this document, and hand the relevant page to each competitor at registration.

Ensure the page is returned with any amendments before they leave registration.

Update TES accordingly before downloading to TopYacht

Important!!

After you have downloaded the .csv file:

- **Open it in Excel.**
- Make changes as needed.
- Then, *whether you have made any changes or not*, use the <Save As> option to **force Excel to save the file as a spread-sheet**. This converts it into the Excel version on that particular PC and makes the mail merge process possible. Check the name. It will be in the similar to “**entry_confirmation_xxx.xlsx**”

Make sure it does not end in “**...(1).xlsx**”. If it does, it means that there is already a file of the same name in the folder. Delete any / all earlier downloaded version and rename the latest version by deleting the two brackets and the “1” or other number that was generated by downloading the file multiple times, then download again
- Save the file into the web browser’s default folder. In all likelihood, this will be the <Downloads> folder, unless a user has changed the download default folder sometime in the past. Excel can save spread-sheets in subtly different formats for earlier versions of Office. Make sure that you choose the latest version to ensure compatibility with Microsoft WORD.
- Then, open the mail merge template in Word.
It should offer to allow you to find the source document (i.e. the .xlsx file). Browse to the folder as listed above then select the entry_confirmation.xlsx file.

Merge and print the forms.
- At the end of proceedings, delete the entry_confirmation_xxx.xlsx file, so all will be ready for the next download/merge event.

TopYacht recommends that you have a practice well before the regatta.

Templates

A list of downloadable templates is available at <https://topyacht.net.au/results/shared/registration/>. Feel free to modify them to suit your event. Additional templates will be added from time to time.

An Example of a download spreadsheet (Personal information has been deleted!!) is available for inspection by clicking [here](#). Personal information has been deleted.

Further Reading

[Mail Merge using an Excel Spreadsheet](#)

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