

**Links Modular Solutions**

**Version 2017.4 Release Notes**

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October 2017

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## POS Changes

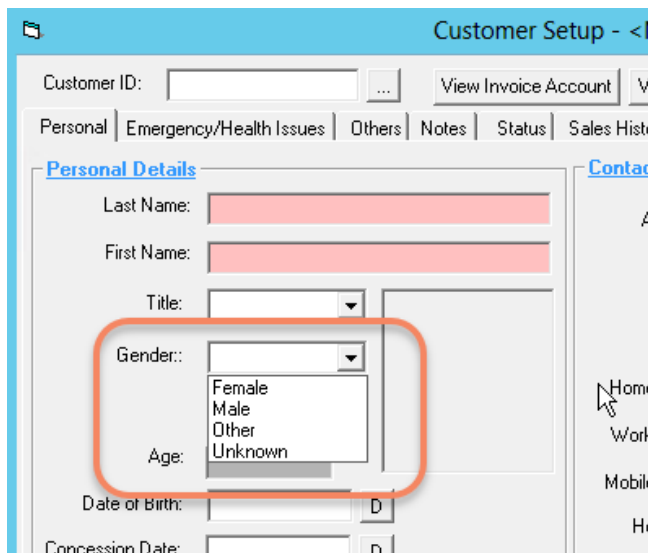
### Ability to support new MasterCard Bin Range 22-27

Card validation now detects that MasterCard Bin Range 22-27 are valid cards.

### Additional Genders Available

There is now the ability to record the following additional genders:

- Unknown (U)
- Other (X)

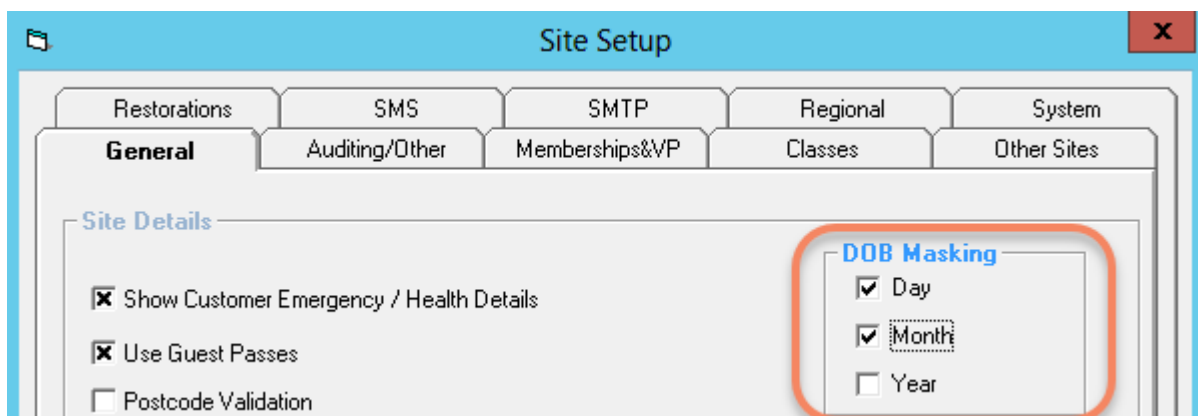


The screenshot shows the 'Customer Setup' window. The 'Personal Details' tab is active. The 'Gender' dropdown menu is open, showing options: Female, Male, Other, and Unknown. The 'Age' dropdown menu is also open, showing the option: Unknown. The 'Date of birth' field is visible below the gender dropdown.

### Masking of Customers Date of Birth

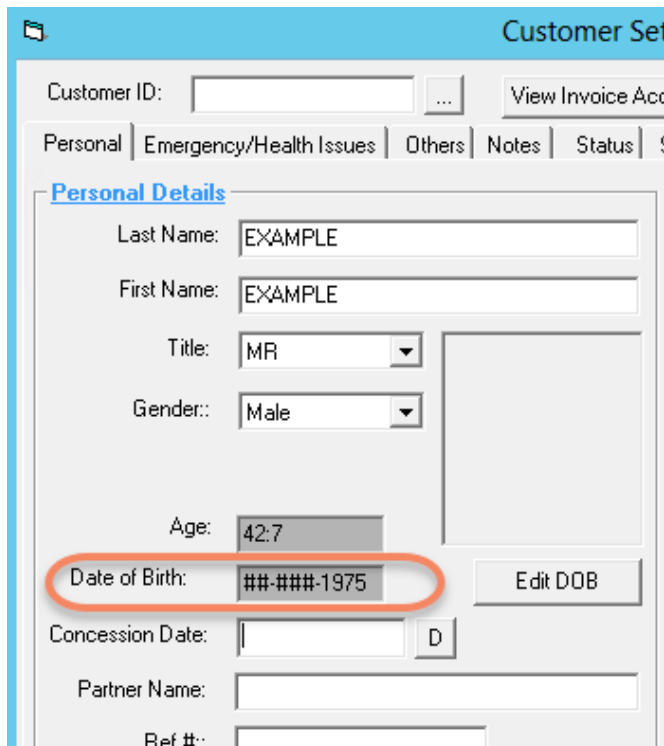
For privacy reasons, Customers date of birth can be hidden on the Customer screen and only visible to staff that have appropriate security privileges.

This is set up in Admin> Site> Site Setup> General



The screenshot shows the 'Site Setup' window. The 'General' tab is active. The 'DOB Masking' section is highlighted with a red box. It contains three checkboxes: 'Day' (checked), 'Month' (checked), and 'Year' (unchecked).

When masking is enabled, the customer screen has ## where the DOB would appear. This does not mask the age calculation.



Customer Set

Customer ID:  ... View Invoice Acc

Personal | Emergency/Health Issues | Others | Notes | Status | S

**Personal Details**

Last Name:

First Name:

Title:

Gender:

Age:

Date of Birth:  Edit DOB

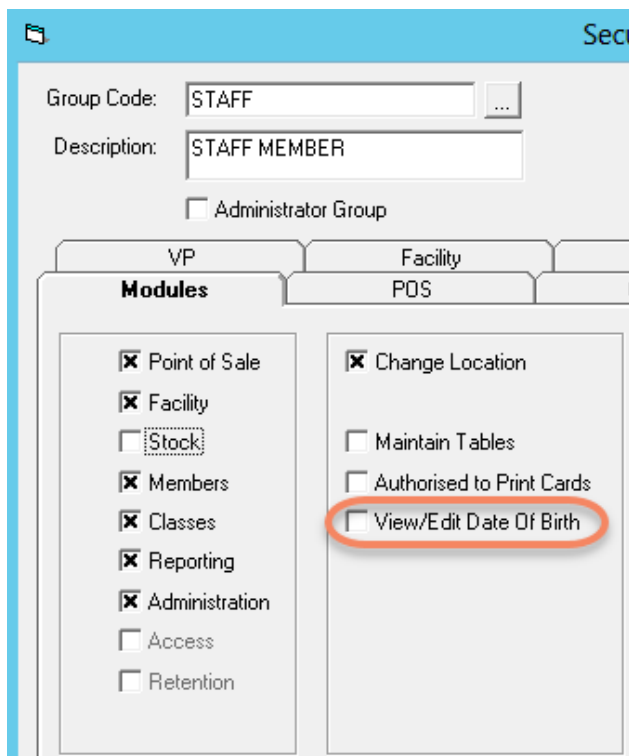
Concession Date:  D

Partner Name:

Ref #:

If this option is turned on, Security Group access will need to be set up to allow staff to view/edit a customer's date of birth after they have been masked.

View/Edit Date of Birth needs to be selected in the Security Group Setup screen in Admin> Security> Security Groups. The applicable Security Group staff members would then be able to select the 'Edit DOB' button.



Security Group Setup

Group Code:  ...

Description:

☐ Administrator Group

VP | Facility | POS

**Modules**

☒ Point of Sale

☒ Facility

☐ Stock

☒ Members

☒ Classes

☒ Reporting

☒ Administration

☐ Access

☐ Retention

☒ Change Location

☐ Maintain Tables

☐ Authorised to Print Cards

☐ View/Edit Date Of Birth

### Integration with Integrated EFTPOS Provider Tyro (Australia Only)

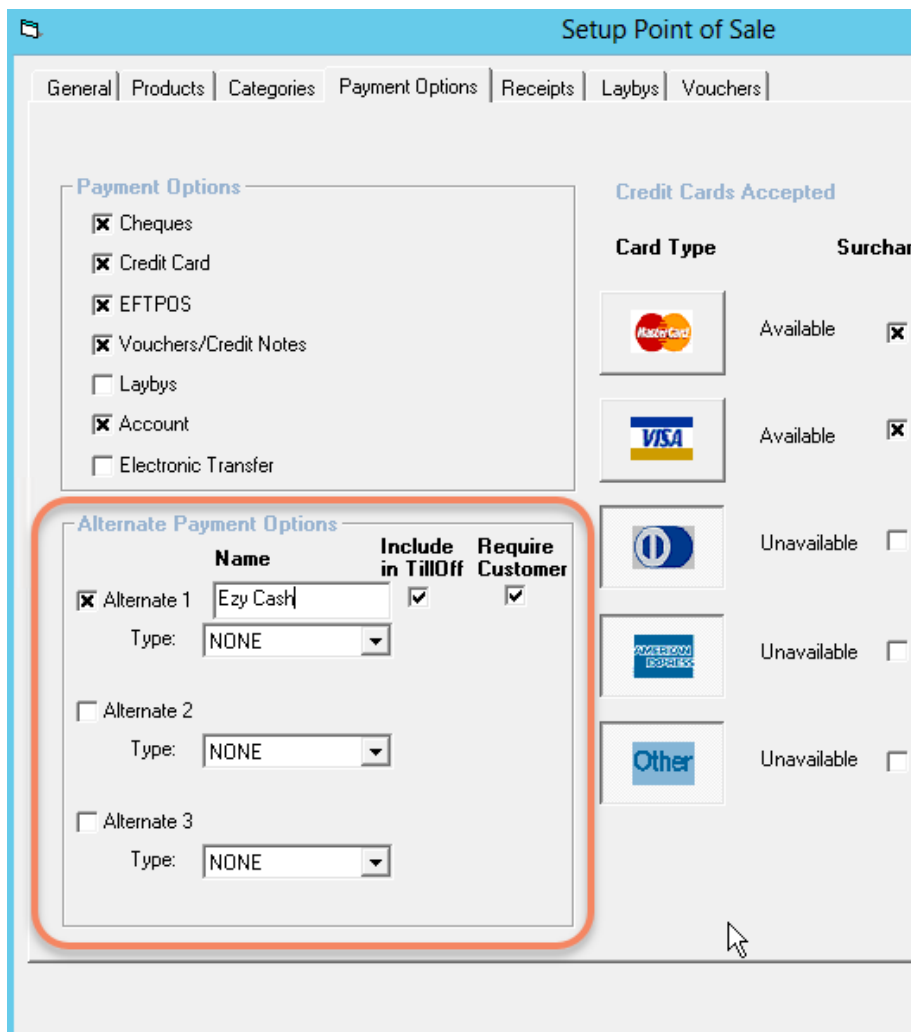
Links now provides Point of Sale integration with TYRO for EFTPOS payments. This integration works the same way as the current integration with PC-EFTPOS where the transactional value can be sent to the device from Links without the need for staff to touch the machine. The customer can then complete payment on the integrated EFTPOS device.

Refunds can also be processed automatically by refunding to the payment type EFTPOS. This action also allows for the customer to swipe their card to have the value returned to their account.

If you wish to move to look at a Tyro Integration, please contact your Account Manager and they assist with organising the transition process for you. They can be contacted on [accountmanagement@linksmodularsolutions.com](mailto:accountmanagement@linksmodularsolutions.com)

### Additional Alternate Tenders

The number of available alternate payment tenders has been increased from one to three. There is also a setting to decide if these tenders are to be included in the till off procedure.



**Setup Point of Sale**

General | Products | Categories | **Payment Options** | Receipts | Laybys | Vouchers





**Payment Options**

- ☒ Cheques
- ☒ Credit Card
- ☒ EFTPOS
- ☒ Vouchers/Credit Notes
- ☐ Laybys
- ☒ Account
- ☐ Electronic Transfer

**Alternate Payment Options**

	Name	Include in TillOff	Require Customer
<input checked="" type="checkbox"/> Alternate 1	Ezy Cash	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Type: NONE		
<input type="checkbox"/> Alternate 2			
	Type: NONE		
<input type="checkbox"/> Alternate 3			
	Type: NONE		

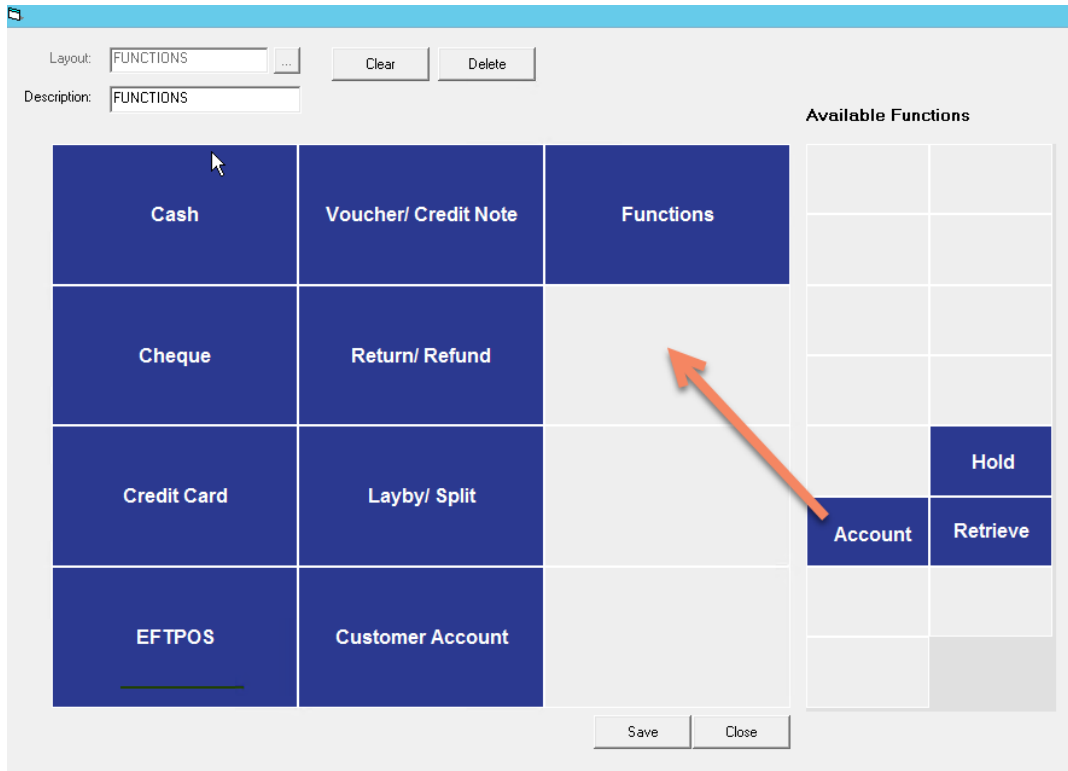
**Credit Cards Accepted**

Card Type	Available	Surchar
	Available	<input checked="" type="checkbox"/>
	Available	<input checked="" type="checkbox"/>
	Unavailable	<input type="checkbox"/>
	Unavailable	<input type="checkbox"/>

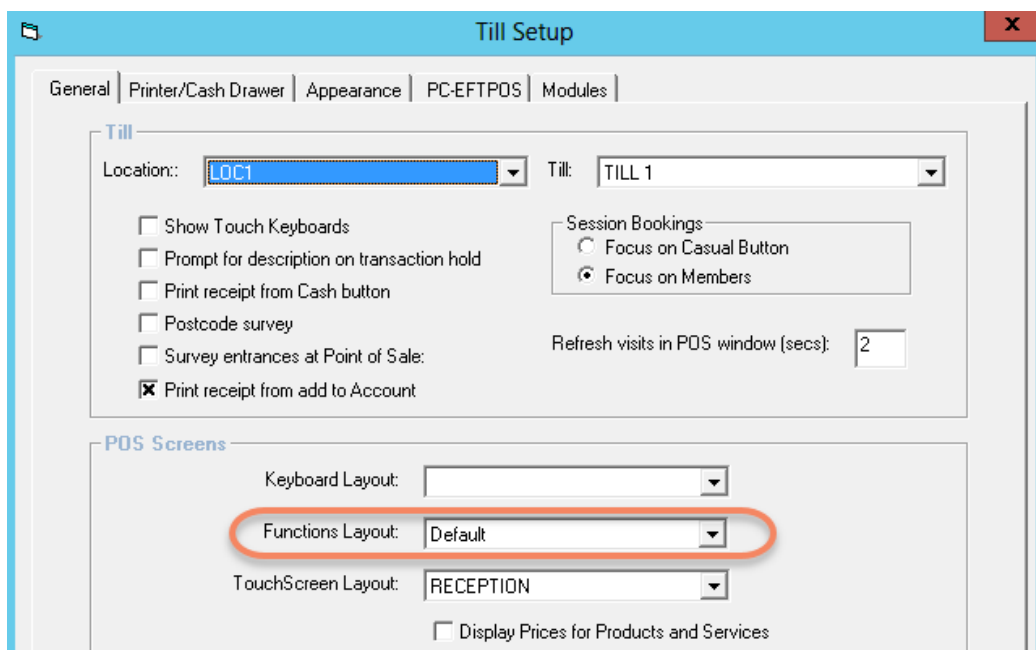
## Ability to customise the 'POS Functions' Layout

There is now the ability to alter the layout of the POS Function Keys. This gives a greater control on the layout options and what functions users can complete.

Layouts are created and edited in POS> Till> Functions Layouts. Available functions are dragged from the list on the left to the grid layout on the right.



The layout is allocated to a PC similar to a Touch Screen in POS> Till> Setup> General



## Fixed Duration Visit Passes

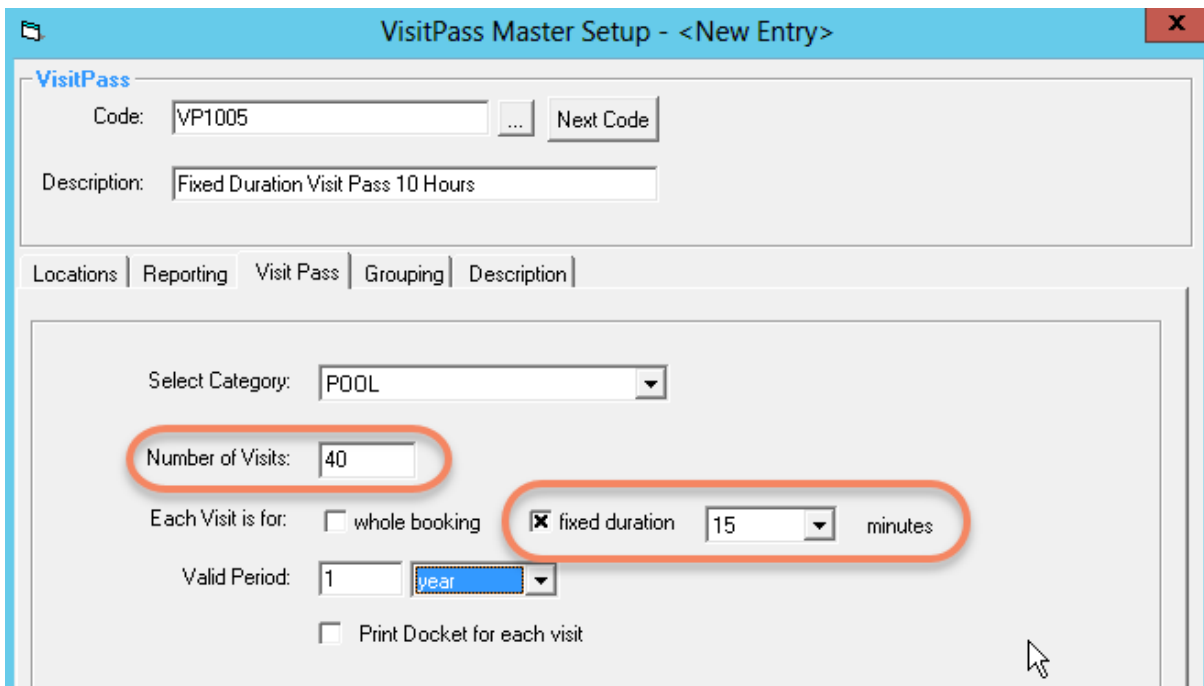
Fixed Duration Visit Passes allow for a pass to be sold and used for a set duration of time when linked to a Facility. Where a pass is then used as payment for a Facility Booking, the corresponding number of visits will be deducted from the customers Visit Pass.

When creating a new Visit Pass, a new switch is now available to determine if the pass sold is either:

- To be used as a whole duration (existing Visit Pass where one attendance equals one visit)
- To be used as a fixed duration

Additionally a drop down is enabled to define the duration of a visit. This duration relates directly to the amount of time that a booking is made for in the Facility module. In the example below one visit will be deducted from the customers visit pass for every 15 minutes of the Facility booking.

To add this visit pass to be able to be used at a Facility go to Admin> Facility> Setup Facility> Select the appropriate Facility> Visit Pass.



**VisitPass Master Setup - <New Entry>**

**VisitPass**

Code: VP1005 ... Next Code

Description: Fixed Duration Visit Pass 10 Hours

Locations | Reporting | **Visit Pass** | Grouping | Description

Select Category: POOL

Number of Visits: 40

Each Visit is for: ☐ whole booking ☒ fixed duration 15 minutes

Valid Period: 1 year

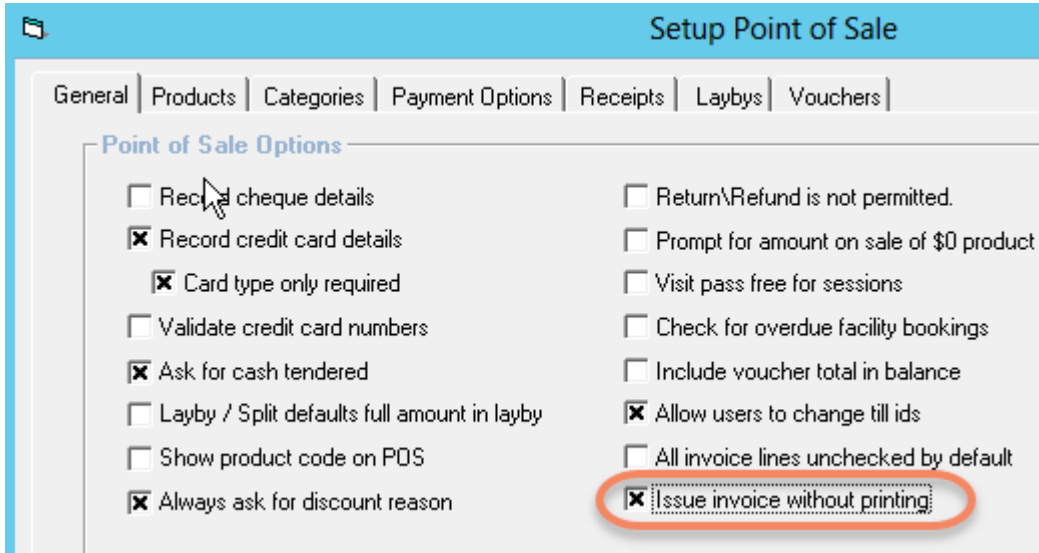
☐ Print Docket for each visit



### Ability to Issue Invoice without Printing (Finance Integration Clients Only)

If you are using a Finance Integration for invoicing with Links, there is now the ability to issue an invoice without the need to print the invoice or display on the generated invoice template.

To enable this feature go to Admin> POS> Setup



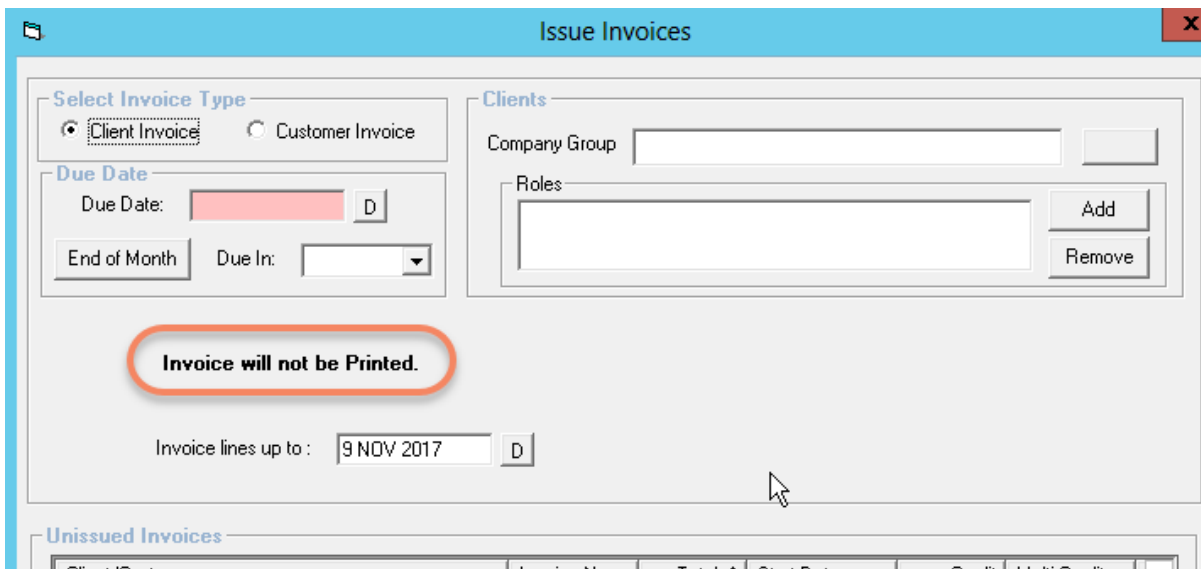
**Setup Point of Sale**

General | Products | Categories | Payment Options | Receipts | Laybys | Vouchers

**Point of Sale Options**

- ☐ Record cheque details
- ☒ Record credit card details
- ☒ Card type only required
- ☐ Validate credit card numbers
- ☒ Ask for cash tendered
- ☐ Layby / Split defaults full amount in layby
- ☐ Show product code on POS
- ☒ Always ask for discount reason
- ☐ Return\Refund is not permitted.
- ☐ Prompt for amount on sale of \$0 product
- ☐ Visit pass free for sessions
- ☐ Check for overdue facility bookings
- ☐ Include voucher total in balance
- ☒ Allow users to change till ids
- ☐ All invoice lines unchecked by default
- ☒ Issue invoice without printing

When issuing the invoice the screen will now show that there is no template to select. Once the 'Due Date' is entered the invoice will be issued.



**Issue Invoices**

Select Invoice Type: ☒ Client Invoice ☐ Customer Invoice

Due Date: Due Date:    
 Due In:

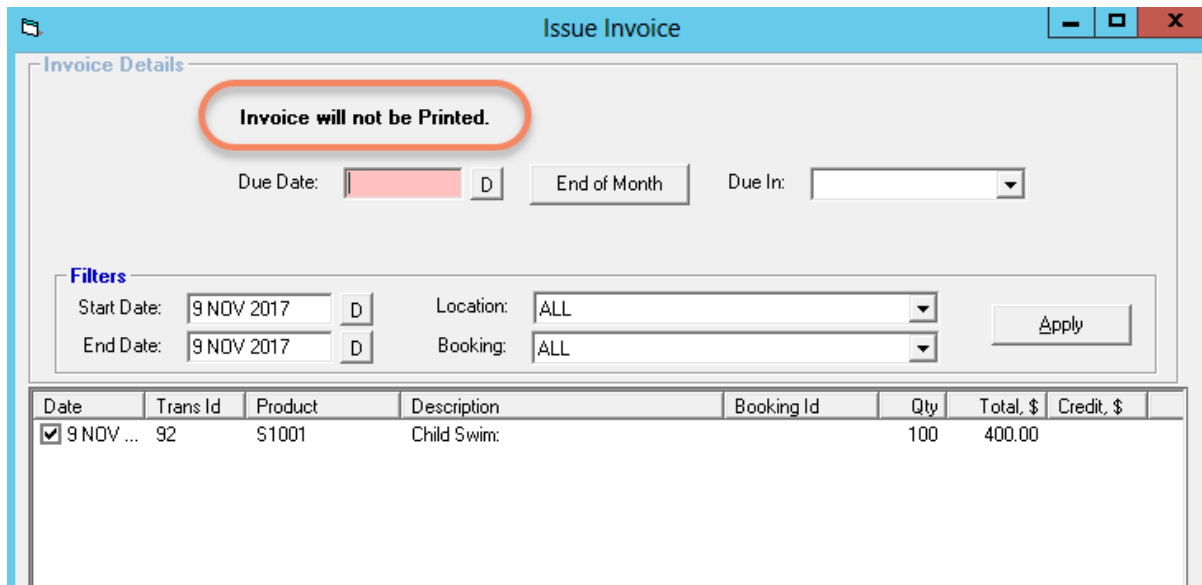
Company Group:   
 Roles:

**Invoice will not be Printed.**

Invoice lines up to:

Unissued Invoices

Client/Customer	Invoice No.	Total \$	Start Date	Credit	Multi Credit



**Issue Invoice**

**Invoice Details**

Invoice will not be Printed.

Due Date:  D End of Month: ☐ Due In:

**Filters**

Start Date: 9 NOV 2017 D Location: ALL  
 End Date: 9 NOV 2017 D Booking: ALL

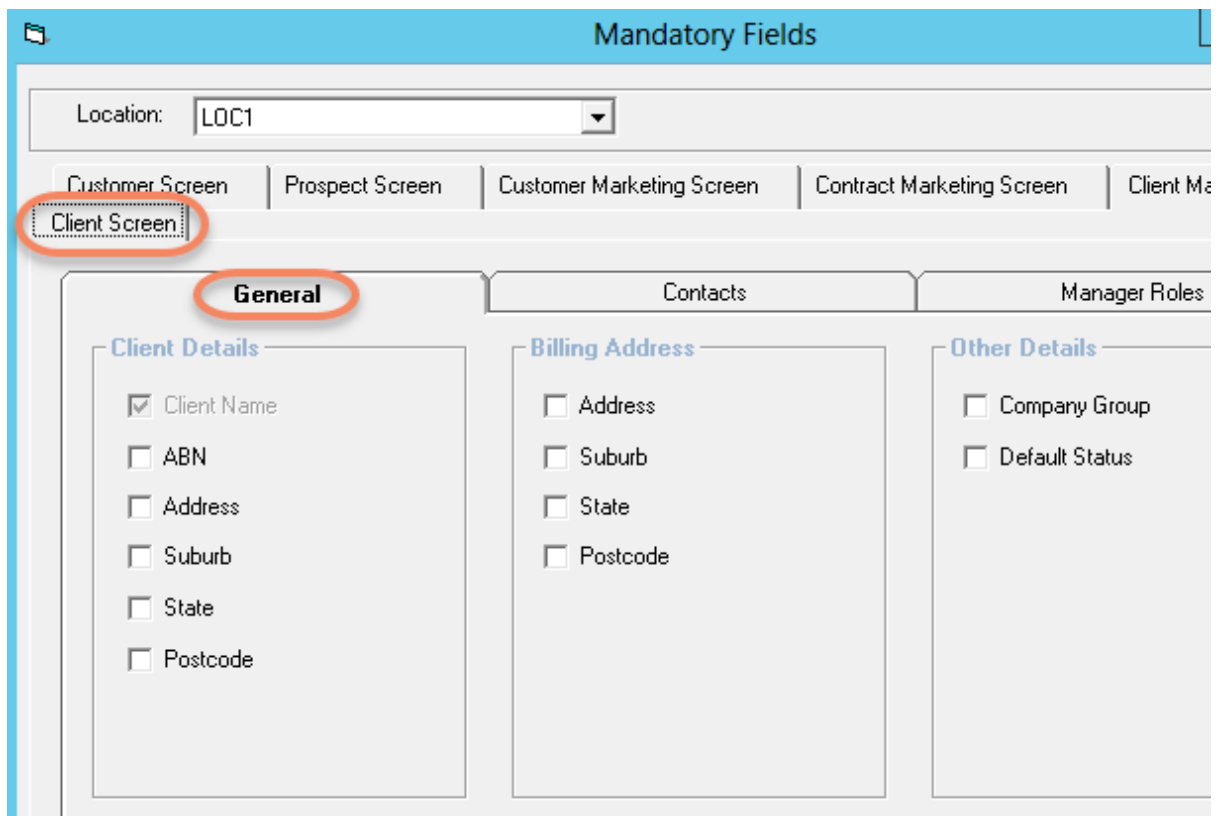
Date	Trans Id	Product	Description	Booking Id	Qty	Total, \$	Credit, \$
9 NOV ...	92	S1001	Child Swim:		100	400.00	

If you would like to discuss a Finance Integration, please contact your Account Manager and they assist with organising the transition process for you. They can be contacted on [accountmanagement@linksmodularsolutions.com](mailto:accountmanagement@linksmodularsolutions.com)

### Mandatory fields for Clients

Mandatory Fields are now available for Clients in Links. These can be turned on in Admin> Site> Mandatory Fields.

General



**Mandatory Fields**

Location: LOC1

Customer Screen | Prospect Screen | Customer Marketing Screen | Contract Marketing Screen | Client Ma

**Client Screen**

**General**

**Client Details**

☒ Client Name  
☐ ABN  
☐ Address  
☐ Suburb  
☐ State  
☐ Postcode

**Contacts**

**Billing Address**

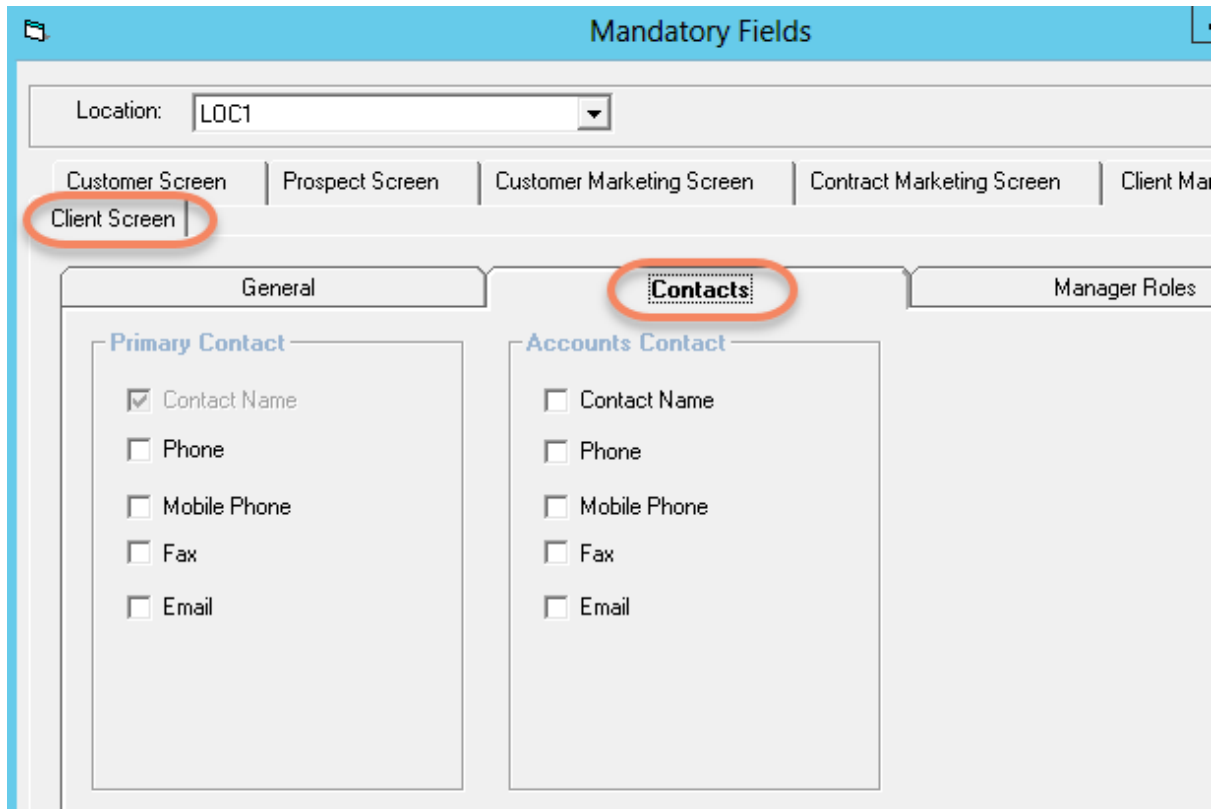
☐ Address  
☐ Suburb  
☐ State  
☐ Postcode

**Manager Roles**

**Other Details**

☐ Company Group  
☐ Default Status

## Contacts



**Mandatory Fields**

Location: LOC1

Customer Screen | Prospect Screen | Customer Marketing Screen | Contract Marketing Screen | Client Marketing Screen

**Client Screen**

General | **Contacts** | Manager Roles

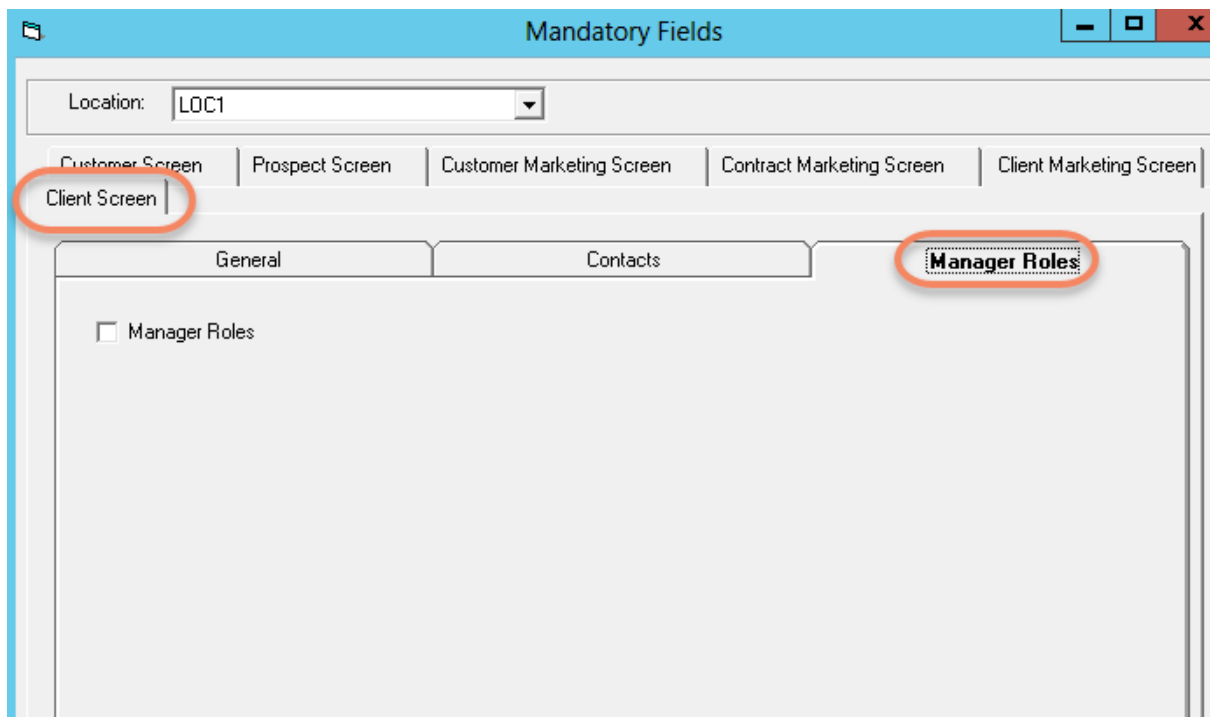
**Primary Contact**

- ☒ Contact Name
- ☐ Phone
- ☐ Mobile Phone
- ☐ Fax
- ☐ Email

**Accounts Contact**

- ☐ Contact Name
- ☐ Phone
- ☐ Mobile Phone
- ☐ Fax
- ☐ Email

## Manager Roles



**Mandatory Fields**

Location: LOC1

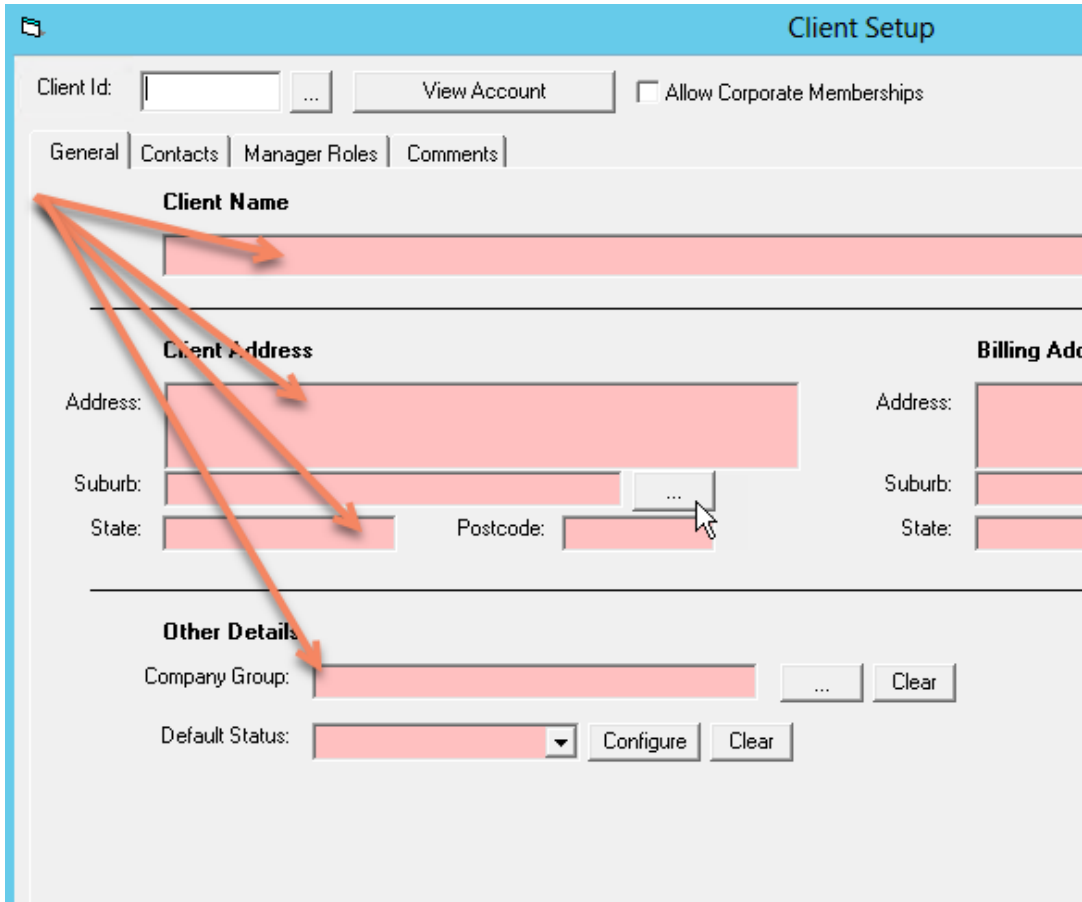
Customer Screen | Prospect Screen | Customer Marketing Screen | Contract Marketing Screen | Client Marketing Screen

**Client Screen**

General | Contacts | **Manager Roles**

☐ Manager Roles

Fields will show pink indicating they are mandatory once they are turned on.



**Client Setup**

Client Id:  ...  ☐ Allow Corporate Memberships

General | Contacts | Manager Roles | Comments

**Client Name**

---

**Client Address**

Address:  **Billing Address**

Suburb:  ...

State:  Postcode:

---

**Other Details**

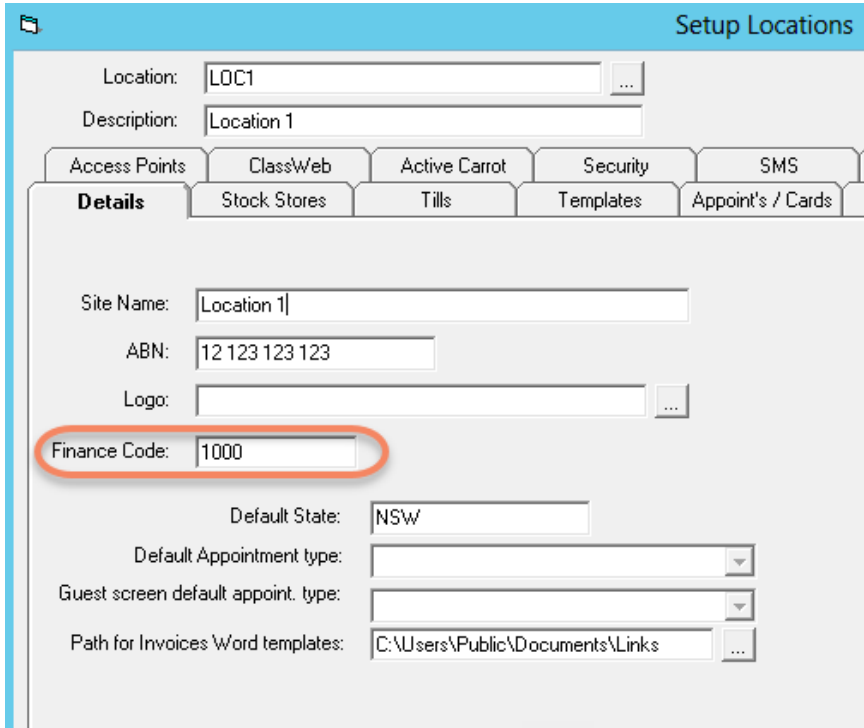
Company Group:  ...

Default Status:

## Ability to apply a BPAY CRN to an Invoice (Australia Only)

You are now able to display your BPAY CRN on invoices. This is set up by location under Admin> Site> Setup Locations/Other Site Parameters> Finance Code.

This code forms the basis of the BPAY CRN.



**Setup Locations**

Location: LOC1 ...

Description: Location 1

Access Points | ClassWeb | Active Carrot | Security | SMS | ...

**Details** | Stock Stores | Tills | Templates | Appoint's / Cards | ...

Site Name: Location 1

ABN: 12 123 123 123

Logo: ...

**Finance Code:** 1000

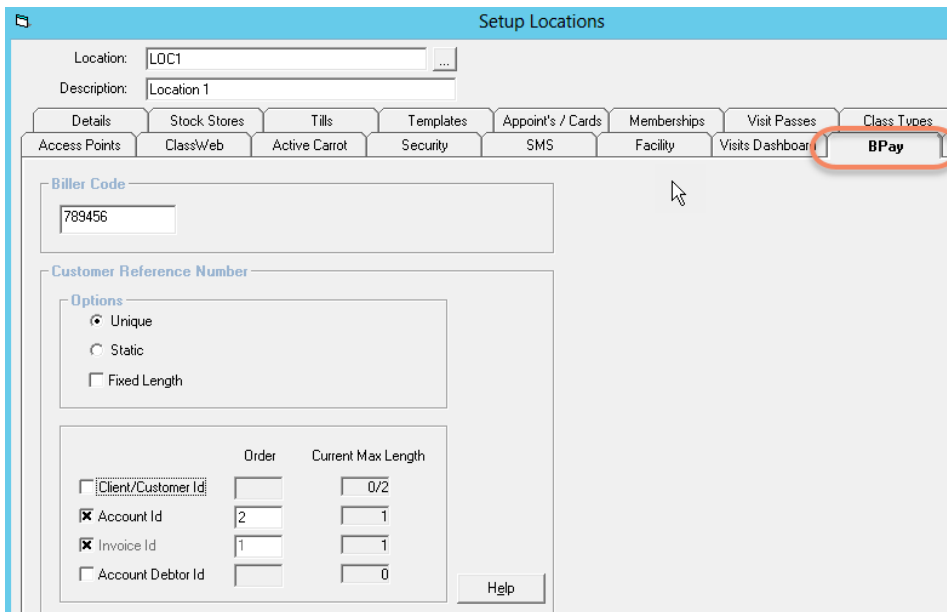
Default State: NSW

Default Appointment type: ...

Guest screen default appoint. type: ...

Path for Invoices Word templates: C:\Users\Public\Documents\Links ...

The rest of the CRN is determined by the configuration in the BPAY tab of Setup Locations/Other Site Parameters.



**Setup Locations**

Location: LOC1 ...

Description: Location 1

Details | Stock Stores | Tills | Templates | Appoint's / Cards | Memberships | Visit Passes | Class Types | ...

Access Points | ClassWeb | Active Carrot | Security | SMS | Facility | Visits Dashboard | **BPAY**

**Biller Code**

789456

**Customer Reference Number**

**Options**

☒ Unique

☐ Static

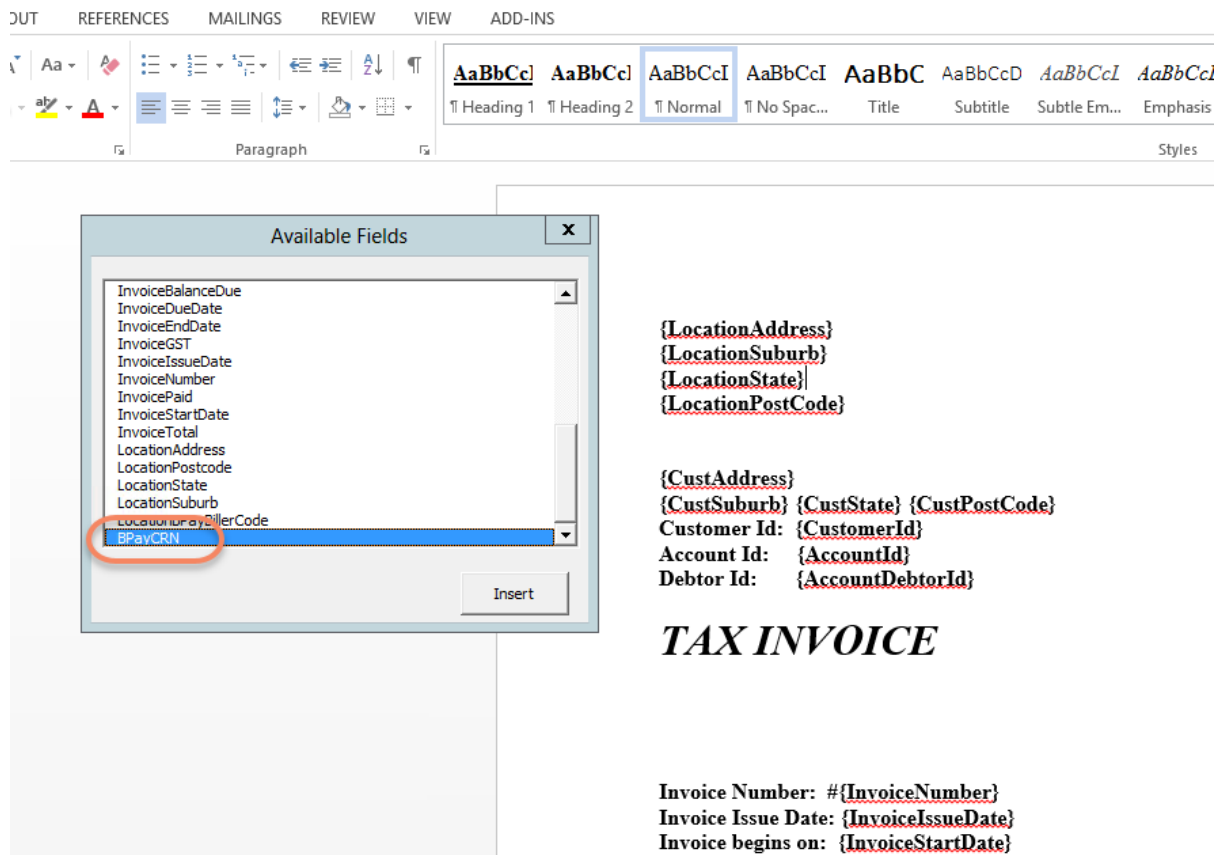
☐ Fixed Length

	Order	Current Max Length
<input type="checkbox"/> Client/Customer Id		0/2
<input checked="" type="checkbox"/> Account Id	2	1
<input checked="" type="checkbox"/> Invoice Id	1	1
<input type="checkbox"/> Account Debtor Id		0

Help

The "Help" button details how the code combinations will make up the BPAY CRN.

When setting up an invoice template the BPAY CRN is now an available merge field.



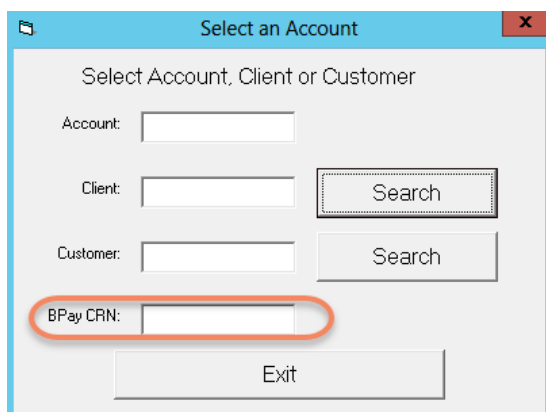
**Available Fields**

- InvoiceBalanceDue
- InvoiceDueDate
- InvoiceEndDate
- InvoiceGST
- InvoiceIssueDate
- InvoiceNumber
- InvoicePaid
- InvoiceStartDate
- InvoiceTotal
- LocationAddress
- LocationPostcode
- LocationState
- LocationSuburb
- LocationSupplierCode
- BPayCRN**

**Styles**

- {LocationAddress}**
- {LocationSuburb}**
- {LocationState}**
- {LocationPostCode}**
- {CustAddress}**
- {CustSuburb}** **{CustState}** **{CustPostCode}**
- Customer Id: {CustomerId}**
- Account Id: {AccountId}**
- Debtor Id: {AccountDebtorId}**
- TAX INVOICE**
- Invoice Number: #{InvoiceNumber}**
- Invoice Issue Date: {InvoiceIssueDate}**
- Invoice begins on: {InvoiceStartDate}**

The BPAY CRN can also be used to search for an Account in POS. It will open up the Invoice directly on the search.



**Select an Account**

Select Account, Client or Customer

Account:

Client:

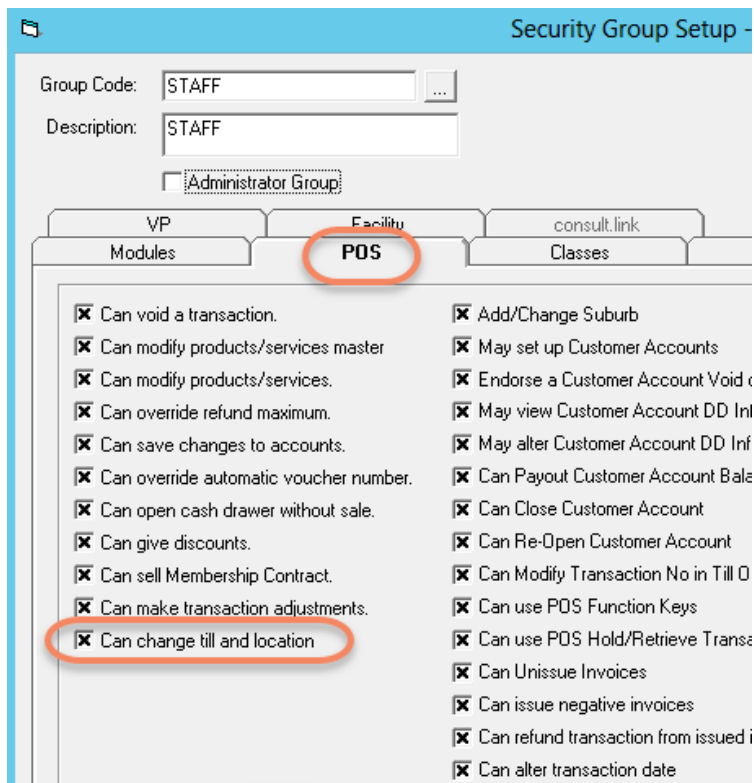
Customer:

**BPay CRN:**

## Ability to change a Till to one from a different Location

For Multi Location databases, there is now the ability to switch to a Till from another Location. This would be beneficial for centralised Finance teams that are processing invoice payments for multiple Locations.

This is enabled via Admin> Security> Security Groups> POS.



**Security Group Setup -**

Group Code: STAFF  
 Description: STAFF

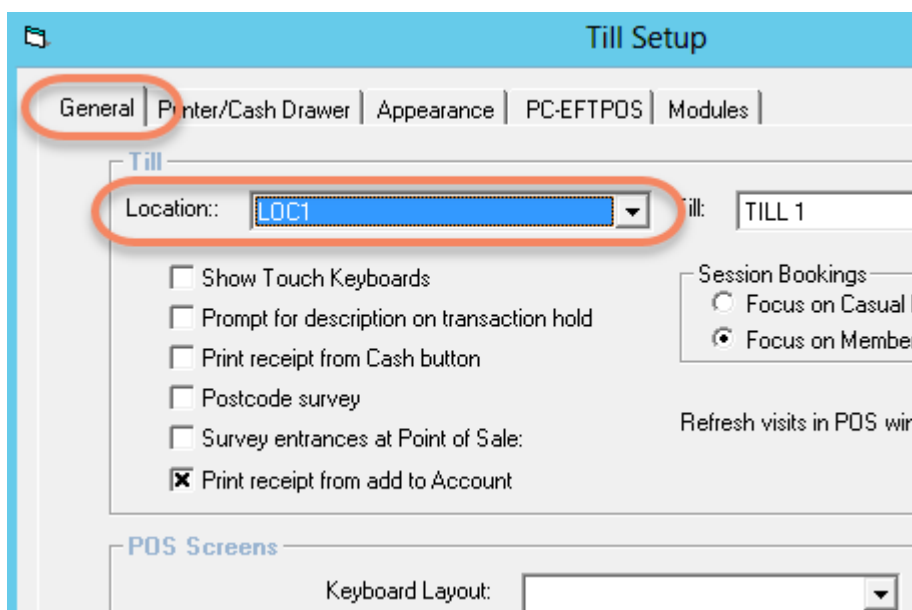
☐ Administrator Group

VP | **POS** | consult.link

Modules | Classes

- ☒ Can void a transaction.
- ☒ Can modify products/services master
- ☒ Can modify products/services.
- ☒ Can override refund maximum.
- ☒ Can save changes to accounts.
- ☒ Can override automatic voucher number.
- ☒ Can open cash drawer without sale.
- ☒ Can give discounts.
- ☒ Can sell Membership Contract.
- ☒ Can make transaction adjustments.
- ☒ Can change till and location
- ☒ Add/Change Suburb
- ☒ May set up Customer Accounts
- ☒ Endorse a Customer Account Void
- ☒ May view Customer Account DD Inf
- ☒ May alter Customer Account DD Inf
- ☒ Can Payout Customer Account Bal
- ☒ Can Close Customer Account
- ☒ Can Re-Open Customer Account
- ☒ Can Modify Transaction No in Till O
- ☒ Can use POS Function Keys
- ☒ Can use POS Hold/Retrieve Trans
- ☒ Can Unissue Invoices
- ☒ Can issue negative invoices
- ☒ Can refund transaction from issued i
- ☒ Can alter transaction date

Once this feature is enabled via the Security Group settings, users are then able to change the Till via POS> Till> Till Setup.



**Till Setup**

General | Printer/Cash Drawer | Appearance | PC-EFTPOS | Modules

Till

Location: LOC1 | Till: TILL 1

- ☐ Show Touch Keyboards
- ☐ Prompt for description on transaction hold
- ☐ Print receipt from Cash button
- ☐ Postcode survey
- ☐ Survey entrances at Point of Sale:
- ☒ Print receipt from add to Account

Session Bookings

- ☐ Focus on Casual E
- ☒ Focus on Member

Refresh visits in POS win

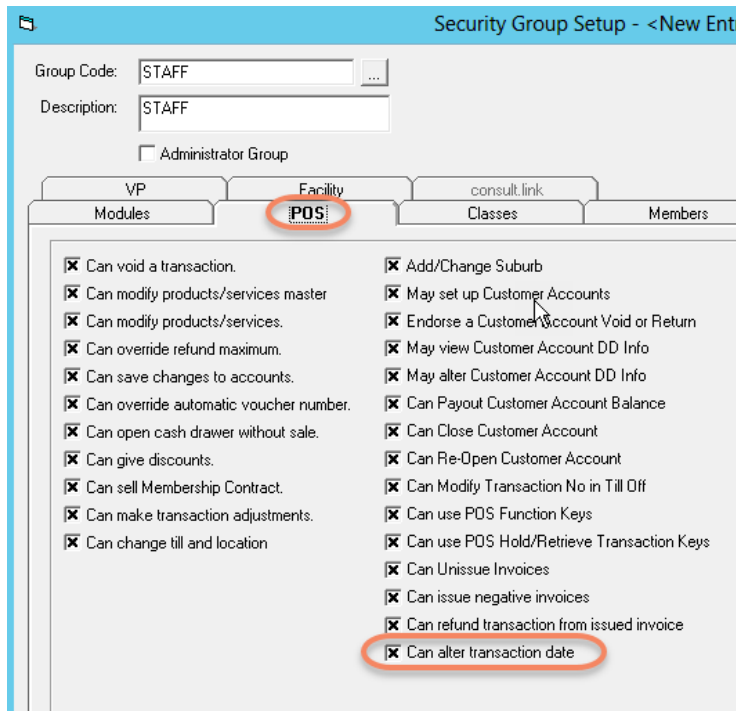
POS Screens

Keyboard Layout: [Dropdown]

## Ability to Alter the Transaction Date

Certain Security Groups can now alter the date for transactions. This can be used if retrospective ActiveCarrot, Classes, Membership or Facility payments need to be entered.

To enable it go to Admin> Security> Security Groups> POS.



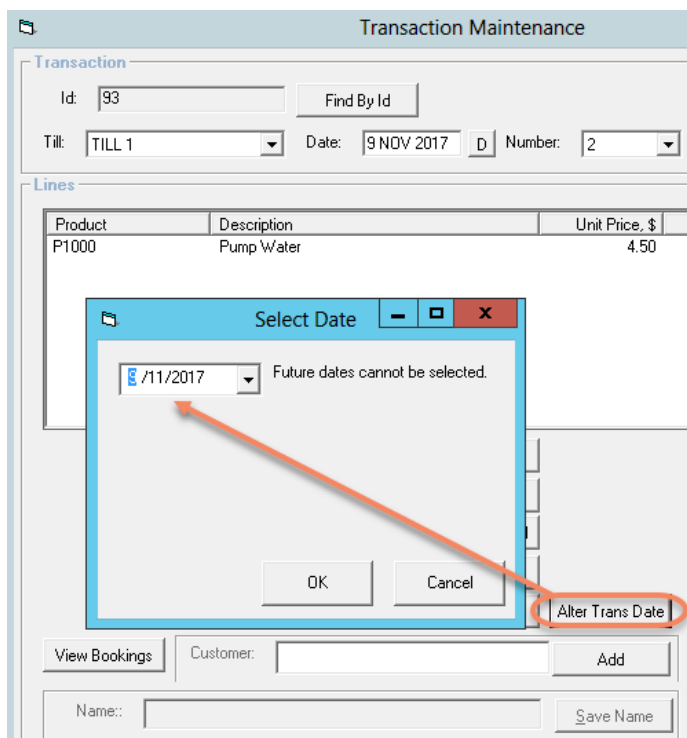
Security Group Setup - <New Entry>

Group Code: STAFF  
 Description: STAFF  
☐ Administrator Group

VP Modules Facility POS consult.link Classes Members

☒ Can void a transaction.  
☒ Can modify products/services master  
☒ Can modify products/services.  
☒ Can override refund maximum.  
☒ Can save changes to accounts.  
☒ Can override automatic voucher number.  
☒ Can open cash drawer without sale.  
☒ Can give discounts.  
☒ Can sell Membership Contract.  
☒ Can make transaction adjustments.  
☒ Can change till and location  
☒ Add/Change Suburb  
☒ May set up Customer Accounts  
☒ Endorse a Customer Account Void or Return  
☒ May view Customer Account DD Info  
☒ May alter Customer Account DD Info  
☒ Can Payout Customer Account Balance  
☒ Can Close Customer Account  
☒ Can Re-Open Customer Account  
☒ Can Modify Transaction No in Till Off  
☒ Can use POS Function Keys  
☒ Can use POS Hold/Retrieve Transaction Keys  
☒ Can Unissue Invoices  
☒ Can issue negative invoices  
☒ Can refund transaction from issued invoice  
☒ Can alter transaction date

In the Transaction Maintenance window, staff with security privileges will be able to select the Alter Trans Date.



Transaction Maintenance

Transaction

Id: 93 Find By Id  
 Till: TILL 1 Date: 9 NOV 2017 D Number: 2

Lines

Product	Description	Unit Price, \$
P1000	Pump Water	4.50

Select Date

11/11/2017 Future dates cannot be selected.

OK Cancel

Alter Trans Date

View Bookings Customer: Add  
 Name: Save Name





## Ability to have one Customer Account to service all Locations

If you wish to move to a centralized customer account structure, please contact your Account Manager and they assist with organising the transition process for you. They can be contacted on [accountmanagement@linksmodularsolutions.com](mailto:accountmanagement@linksmodularsolutions.com)

This feature will allow customer account credit to be used and/or topped up at any location for Multi Location databases.

If you are utilizing the Other Purchases Run to pay off/top-up Customer Accounts you will need to designate which location will process the debits for all Customer Accounts in the database.

The customer account screen will now display detail of which location a credit/debit transaction occurred at.

There is also a new report to illustrate the payment/use of credit across locations.

This can be found under Reporting> Point of Sale> Customer Account Movements.

The Report can be viewed as a summary to see total movement.

### Location 1

#### Customer Account Movements Report (SUMMARY)

Between 10 NOV 2017 and 10 NOV 2017  
Location: All

Location	Paid To Customer Account,\$	Used From Customer Account,\$	Used From Customer Account At Other Location,\$	TOTAL,\$
LOC1	50.00	6.00	0.00	44.00
LOC3	50.00	33.60	0.00	16.40
TOTAL	100.00	39.60	0.00	60.40

\*\*\*End of report.\*\*\*

Or a detailed view to see Location-to-Location movement.

**Location 1**

### Customer Account Movements Report (DETAILED)

**Between 3 NOV 2017 and 10 NOV 2017**  
**Location: LOC1**

#### Summary

Product	Amount,\$
Amount Paid to Customer Accounts	50.00
Amount Used from Customer Accounts	6.00

#### Breakdown of 'Amount Paid to Customer Accounts'

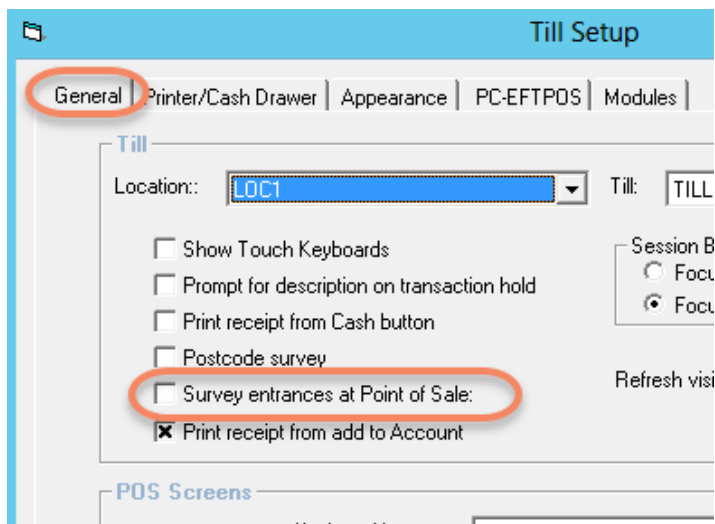
Customer	Account Id	Amount,\$
MCCUBBEN, CALEB	909	50.00

#### Breakdown of 'Amount Used from Customer Accounts'

Customer	Account Id	Service Description	Amount,\$
MCCUBBEN, CALEB	909	Swim Child/Student/Conc Entry	6.00

### Ability to enable Activity Survey by PC

The Activity Survey can now be turned on by PC rather than by database. This is turned on in POS> Till> Till Setup.



**Till Setup**

General | Printer/Cash Drawer | Appearance | PC-EFTPOS | Modules

**Till**

Location: **LOC1** Till: **TILL**

☐ Show Touch Keyboards  
☐ Prompt for description on transaction hold  
☐ Print receipt from Cash button  
☐ Postcode survey  
☒ **Survey entrances at Point of Sale:**  
☒ Print receipt from add to Account

Session B  
☐ Focus  
☒ Focus

Refresh visi

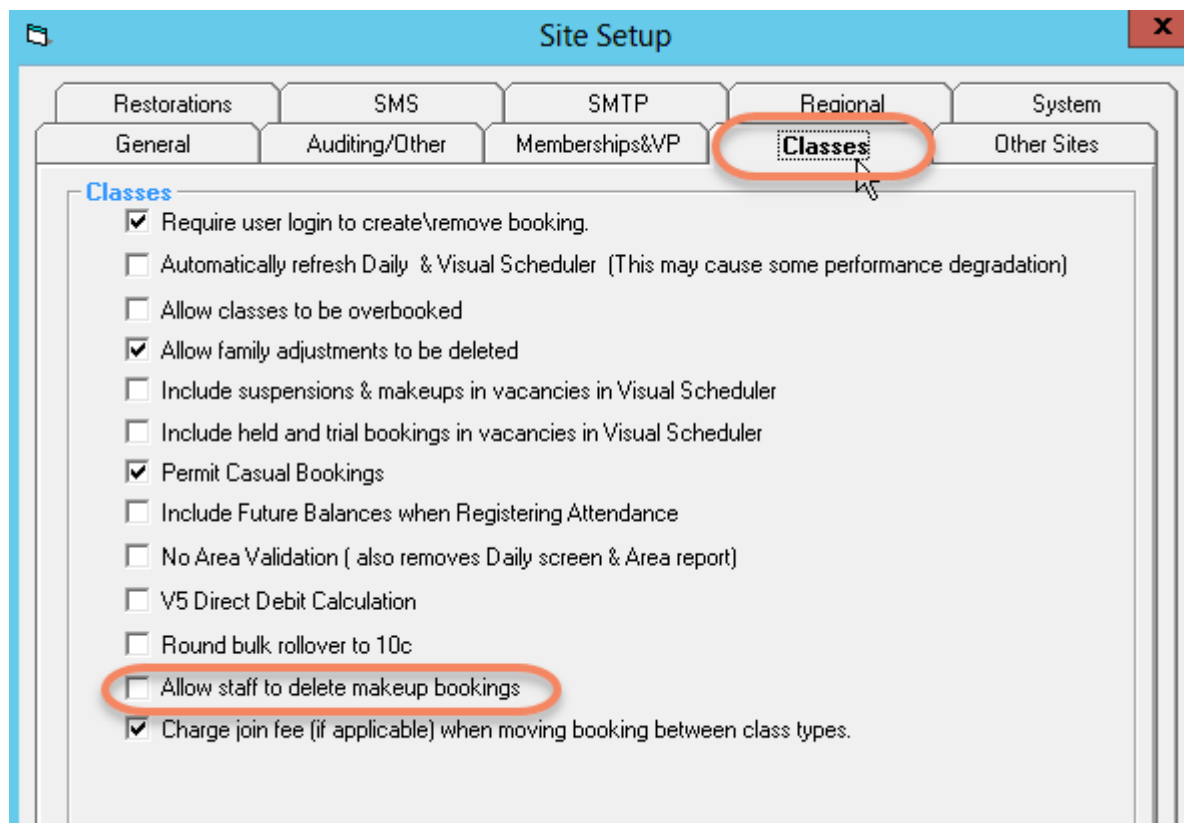
**POS Screens**

Keyboard Layout:

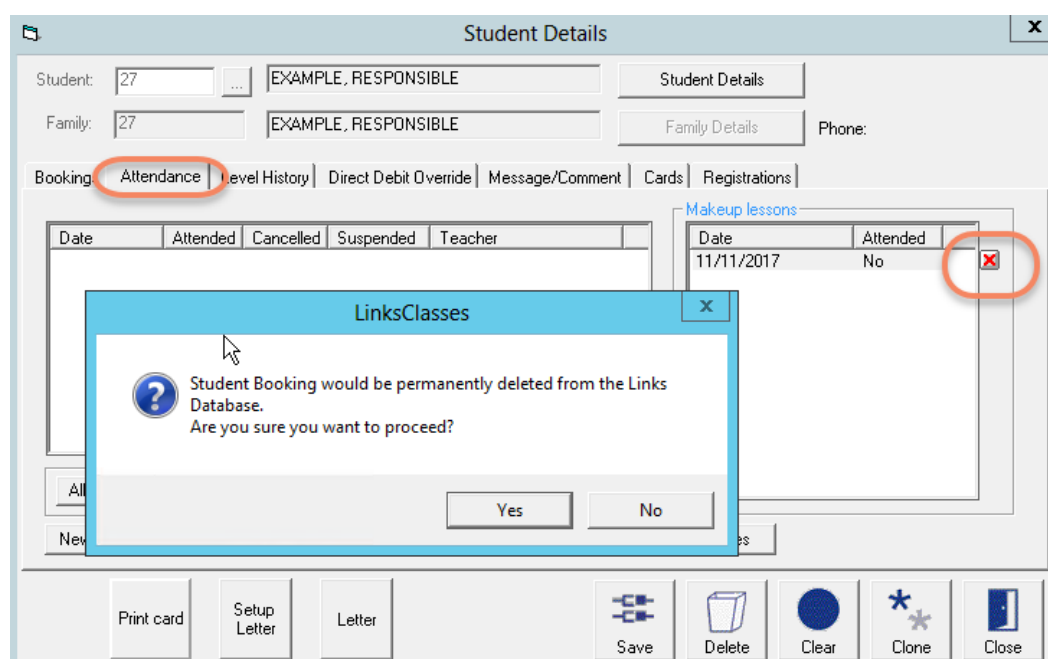
## Classes Changes

### Make Up Bookings can now be deleted

There is now the ability to delete Make Up Bookings in Links. The feature must be turned on under Site> Site Setup> Classes.

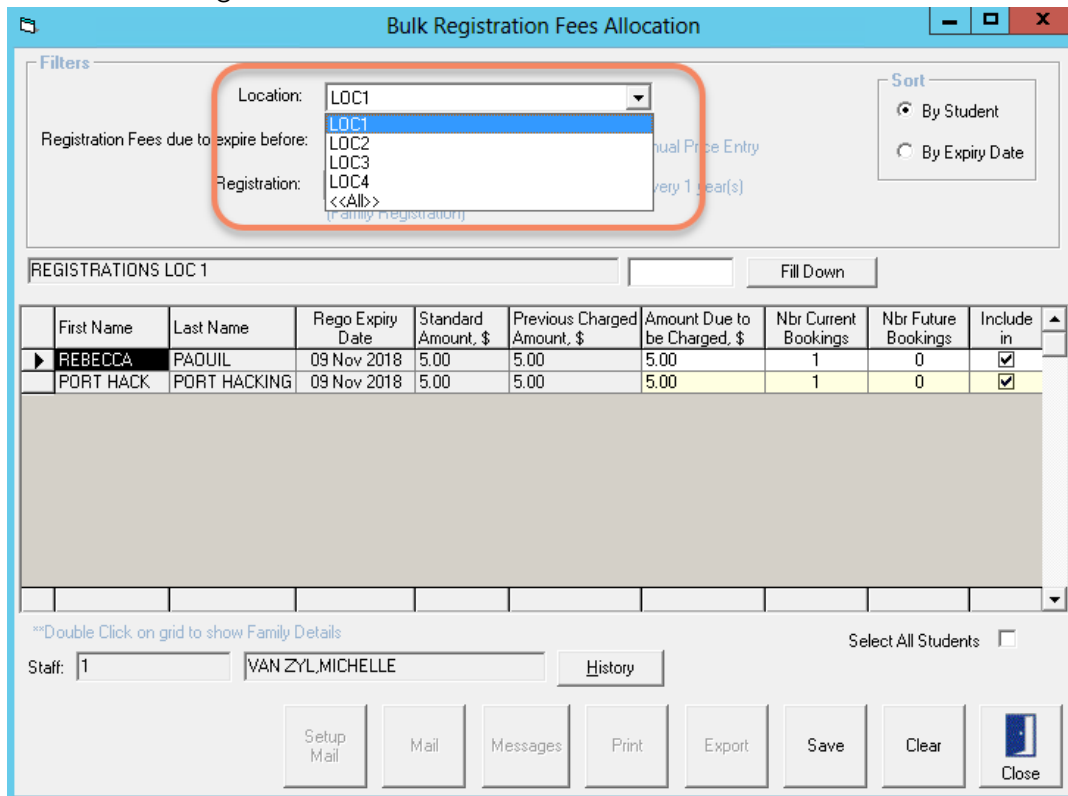


This enables the red X for cancelling in the Student Screen



## Ability to Rollover Registrations by Location

You can now filter by location when rolling over Registrations. This is done via Admin> Classes> Bulk Registration Rollover.



**Bulk Registration Fees Allocation**

Filters

Location: **LOC1** (dropdown menu showing LOC1, LOC2, LOC3, LOC4, <<All>>)

Registration Fees due to expire before: [dropdown]

Registration: [dropdown]

Sort: ☒ By Student ☐ By Expiry Date

REGISTRATIONS LOC 1 [Fill Down]

	First Name	Last Name	Rego Expiry Date	Standard Amount, \$	Previous Charged Amount, \$	Amount Due to be Charged, \$	Nbr Current Bookings	Nbr Future Bookings	Include in
▶	REBECCA	PAQUIL	09 Nov 2018	5.00	5.00	5.00	1	0	<input checked="" type="checkbox"/>
	PORT HACK	PORT HACKING	09 Nov 2018	5.00	5.00	5.00	1	0	<input checked="" type="checkbox"/>

\*\*Double Click on grid to show Family Details

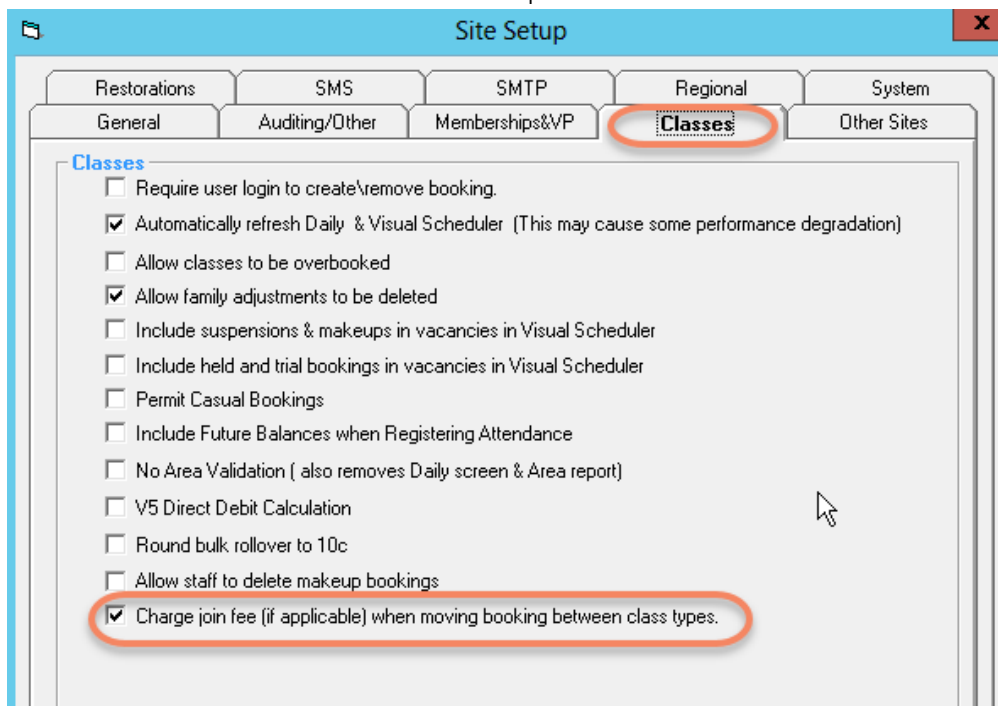
Staff: 1 VAN ZYL, MICHELLE [History]

Select All Students ☐

Buttons: Setup Mail, Mail, Messages, Print, Export, Save, Clear, Close

## Ability to Charge a Joining Fee when moving between Class Types

If a Student is moving between Class Types, there is now the ability to charge a joining fee. This is turned on in Admin> Site> Site Setup> Classes tab.



**Site Setup**

Tabs: Restorations, SMS, SMTP, Regional, System

Sub-tabs: General, Auditing/Other, Memberships&VP, **Classes**, Other Sites

**Classes**

- ☐ Require user login to create/remove booking.
- ☒ Automatically refresh Daily & Visual Scheduler (This may cause some performance degradation)
- ☐ Allow classes to be overbooked
- ☒ Allow family adjustments to be deleted
- ☐ Include suspensions & makeups in vacancies in Visual Scheduler
- ☐ Include held and trial bookings in vacancies in Visual Scheduler
- ☐ Permit Casual Bookings
- ☐ Include Future Balances when Registering Attendance
- ☐ No Area Validation (also removes Daily screen & Area report)
- ☐ V5 Direct Debit Calculation
- ☐ Round bulk rollover to 10c
- ☐ Allow staff to delete makeup bookings
- ☒ Charge join fee (if applicable) when moving booking between class types.

## Facility Changes

### Ability to send Facility Booking charges to a Customer Account

For those that have enabled Customer Accounts for Customers, Facility bookings can now be paid for using Customer Accounts.

For sites that are using Integrated Payments and choosing to use direct debit for Customer Accounts, Facility Bookings can be automatically debited a number of days prior to the booking occurring. Please contact the Links Client Services team to have this activated.

Once enabled all Locations by default are now enabled to allow Customer Accounts.

When making a booking an additional payment type is now enabled.

Date Booked: **Fri 10/11/2017**
Booking ID
Ref #

**Extensions**

☐ Major Event

**Booking Details**

☐ Casual Use

☒ Customer

☐ Client

Booking Name:

Customer Id:

Name:

Method: ☐ Invoice Account ☒ Cash On Arrival ☒ Customer Account

Instructions:  0/255 PO Number:

Prime Usage:

☐ Permanent Booking

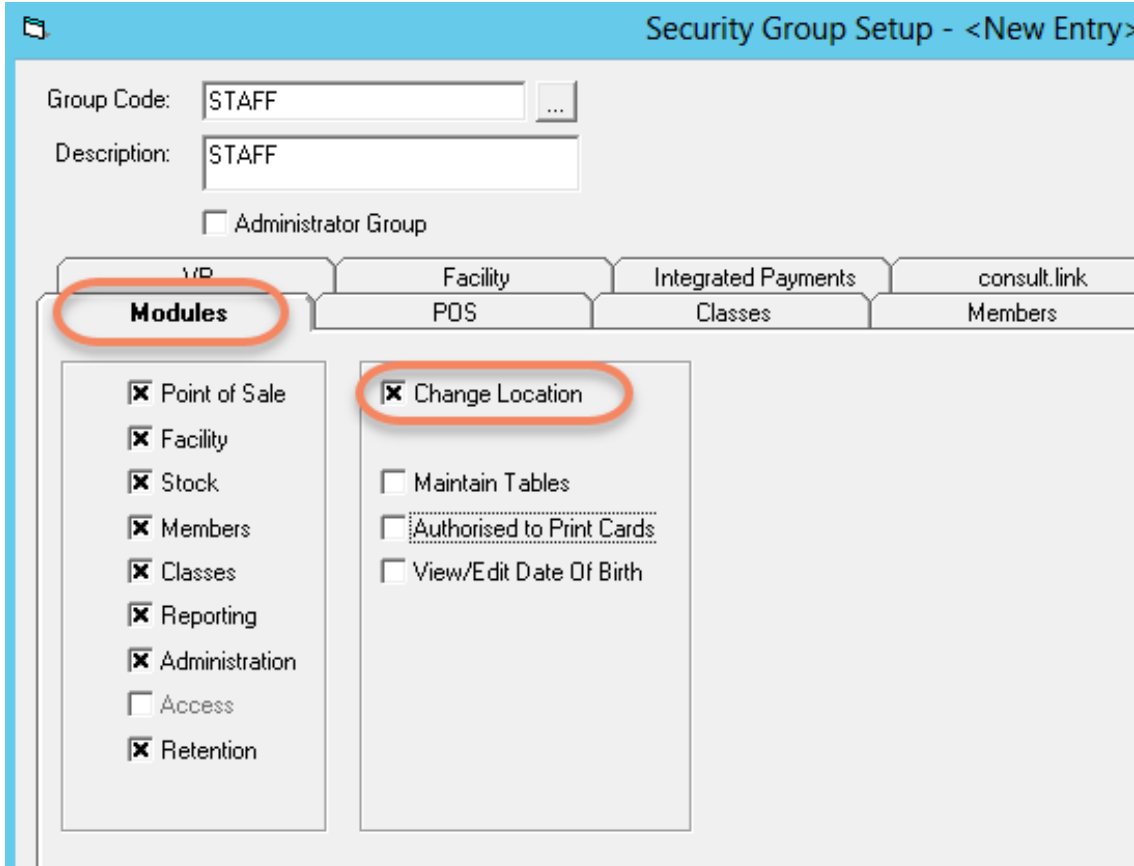
Facility Name	Date	Day	From Time	To Time	Attended	Pax	Duration (mins)	No. Periods	\$ Per Period
▶ Cafe Area	10/11/2017	Fr	06:15 AM	06:30 AM	<input type="checkbox"/>	0	15	1	20

## Admin Changes

### Limit the Locations Staff have access to

Locations that a staff member has access to can be limited based on settings in the Security Group settings and the Staff profile screen. This is set up in Admin> Security> Security Group> Modules> Change Location.

When this option is selected, staff in this group have the ability to use the 'Change Location' button on the Links home screen. The Locations that staff are able to login to are set in the Staff Setup screen.



Security Group Setup - <New Entry>

Group Code:  ...

Description:

☐ Administrator Group

☒ VP  
☒ **Modules**  
☐ Facility  
☐ POS  
☐ Integrated Payments  
☐ Classes  
☐ consult.link  
☐ Members

☒ Point of Sale  
☒ Facility  
☒ Stock  
☒ Members  
☒ Classes  
☒ Reporting  
☒ Administration  
☐ Access  
☒ Retention

☒ **Change Location**  
☐ Maintain Tables  
☐ Authorised to Print Cards  
☐ View/Edit Date Of Birth

Once the above option is enabled, the locations that a staff member can access is controlled individually for each staff member in Admin> Security> Staff Setup> Roles. Select the Locations that the staff member has ability to log in to and report on in the Reporting module.

Staff Setup

Staff Code:  ...  ☐ Inactive

Person:

Personal
Contact
Security
Roles
Skills & Training
Availability
Functions & Classifications

**Security Group Membership**

Group Code:  ...

Description:

**Password Change**

**Available Locations**

Home Location:

This user has permission to change location

**Available Locations:**

Location
<input checked="" type="checkbox"/> LOC1
<input type="checkbox"/> LOC2
<input checked="" type="checkbox"/> LOC3
<input type="checkbox"/> LOC4

When 'View/book other Location's Facilities' is selected, staff in this Security Group then have the option to select the 'Locations' button in Facility> Visual Facility Booking to be able to look at Facilities at a different location to where the staff are currently logged in.

**Security Group Setup**

Group Code:  ...

Description:

☐ Administrator Group

Modules  
VP

POS  
**Facility**

Classes  
Integrated Payments

Members  
consult.link

☒ Can modify facility bookings  
☐ Can create casual bookings - cash only  

☐ Can assign staff/assets.

☐ Only book  days in advance

☐ Can only book PAY NOW

☐ Only book lowest level facilities  
☐ Only attend casual bookings  

☒ Can view/book other location's facilities  

☐ At Staff Member's Available Locations

☒ At Any Location

☒ Can modify Booking Charge after Payment made  
☒ Prompt on \$0.00 invoice payment  

Booking Start/Finish Times:  
☐ 0 ☐ 15 ☐ 30 ☐ 45

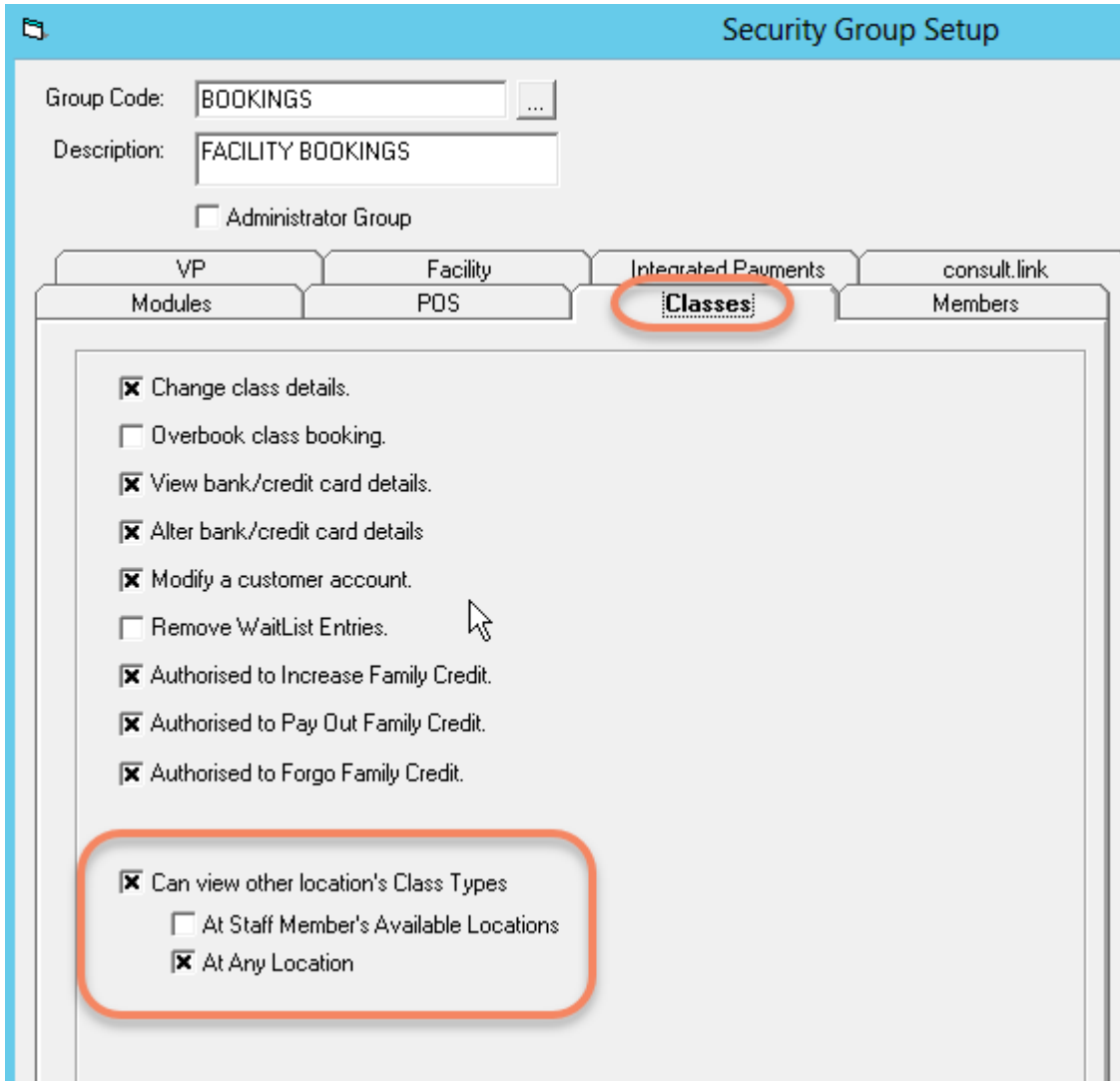
☒ Can override external documents path  
☒ Can book in unavailable times  
☒ Can unlock open bookings  
☒ Can limit booking screen access  
☒ Can access enquiry screen  
☒ Can delete booking documents and files  
☒ Can reverse Invoice Sent Flag  
☒ Can use Booking Letter OPEN function  
  
☒ Can book over existing enquiry  
☒ Can enquire over existing enquiry  
☒ Can enquire over existing booking

Once this option is selected a further selection needs to be made

- a. When 'At Staff Member's Available Locations' is selected, staff can only see facilities from other locations based on selections made in Security> Staff Setup> Roles.
- b. 'At Any Location' allows staff to view and book facilities at all locations in the database.



Similar to the Facilities tab, which locations Class Types the staff member can see and book can be controlled. Once 'Can view other Location's Class Types' is enabled, the Locations Class Types the staff member can see can be limited.



**Security Group Setup**

Group Code:  ...

Description:

☐ Administrator Group

VP Modules    Facility POS    Integrated Payments **Classes**    consult.link Members

- ☒ Change class details.
- ☐ Overbook class booking.
- ☒ View bank/credit card details.
- ☒ Alter bank/credit card details
- ☒ Modify a customer account.
- ☐ Remove WaitList Entries.
- ☒ Authorised to Increase Family Credit.
- ☒ Authorised to Pay Out Family Credit.
- ☒ Authorised to Forgo Family Credit.

☒ Can view other location's Class Types

- ☐ At Staff Member's Available Locations
- ☒ At Any Location

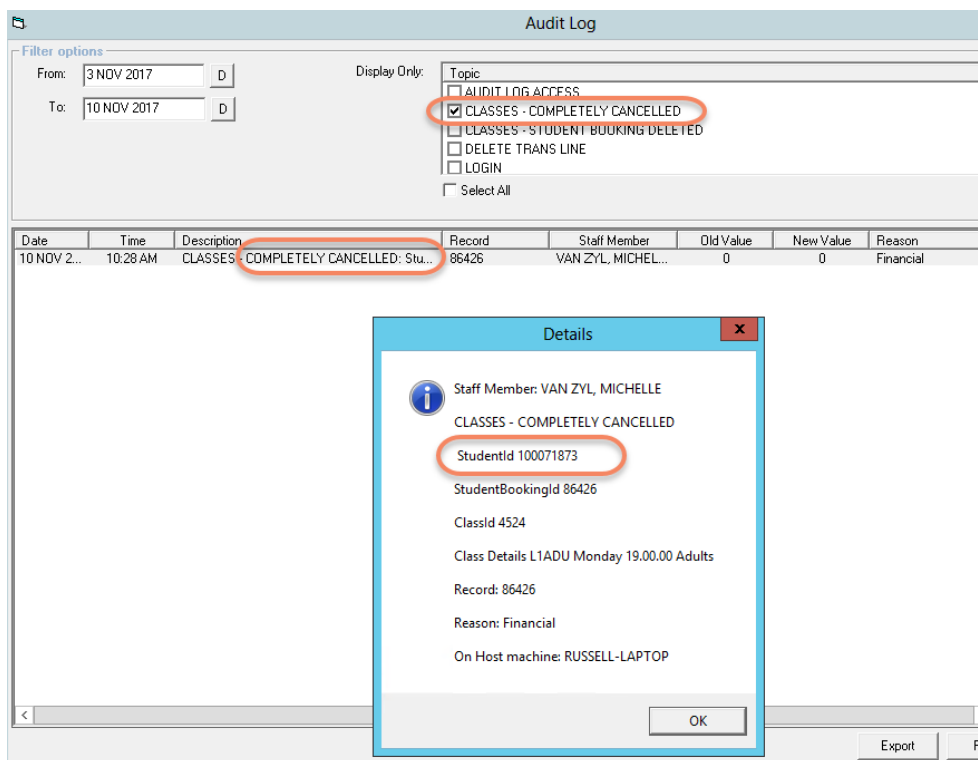
Once this option is selected a further selection needs to be made

- a. When 'At Staff Member's Available Locations' is selected, staff can only see facilities from other locations based on selections made in Security > Staff Setup > Roles
- b. 'At Any Location' allows staff to view and book facilities at all locations in the database

## Changes to Audit Log

*Student ID displays when a Booking has been completely Cancelled*

When a Student Booking has been deleted from within Classes> Students and Families> Students or Completely Cancelled from the Class Cancellation screen, the Student ID is now available in the Audit log to allow sites to track when bookings have been removed.



**Audit Log**

Filter options: From: 3 NOV 2017 To: 10 NOV 2017

Display Only: ☒ CLASSES - COMPLETELY CANCELLED

Date	Time	Description	Record	Staff Member	Old Value	New Value	Reason
10 NOV 2...	10:28 AM	CLASSES - COMPLETELY CANCELLED: Stu...	86426	VAN ZYL, MICHEL...	0	0	Financial

**Details**

Staff Member: VAN ZYL, MICHELLE

CLASSES - COMPLETELY CANCELLED

StudentId 100071873

StudentBookingId 86426

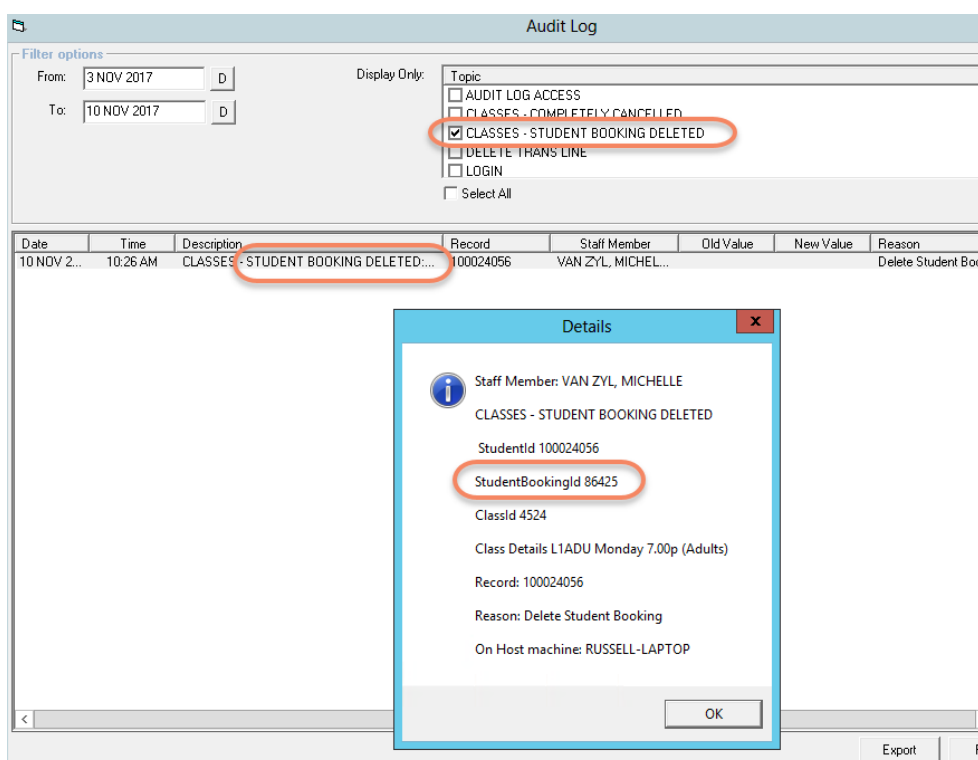
ClassId 4524

Class Details L1ADU Monday 19.00.00 Adults

Record: 86426

Reason: Financial

On Host machine: RUSSELL-LAPTOP



**Audit Log**

Filter options: From: 3 NOV 2017 To: 10 NOV 2017

Display Only: ☒ CLASSES - STUDENT BOOKING DELETED

Date	Time	Description	Record	Staff Member	Old Value	New Value	Reason
10 NOV 2...	10:26 AM	CLASSES - STUDENT BOOKING DELETED:...	100024056	VAN ZYL, MICHEL...			Delete Student Bool

**Details**

Staff Member: VAN ZYL, MICHELLE

CLASSES - STUDENT BOOKING DELETED

StudentId 100024056

StudentBookingId 86425

ClassId 4524

Class Details L1ADU Monday 7.00p (Adults)

Record: 100024056

Reason: Delete Student Booking

On Host machine: RUSSELL-LAPTOP

## Additional Audited Features

Other items that are now included in the Audit log include:

- Held Transaction
- Retrieve Transaction
- Delete a transaction line
- Clear Transaction
- Print Previous Receipt
- Change Staff Security Group

Audit Log

Filter options

From: 3 NOV 2017 D

To: 10 NOV 2017 D

Display Only:

Topic

☒ RETRIEVE TRANS

☒ SECURITY GROUP CHANGE

☐ STAFF MEMBER ADDED

☐ STAFF PASSWORD CHANGE

☒ Transaction cleared

☐ Select All

Apply

Date	Time	Description	Record	Staff Member	Old Value	New Value	Reason
10 NOV 2...	10:37 AM	Transaction cleared: Transaction total = \$214...	0	ONE, STAFF EXA...	\$214.00		Clear Transaction
10 NOV 2...	10:35 AM	SECURITY GROUP CHANGE: Staff member ...	251	ONE, STAFF EXA...	BOOKINGS	SUPERVISOR	Staff Security Group Assignment
10 NOV 2...	10:34 AM	Transaction cleared: Transaction total = \$24.00	0	ONE, STAFF EXA...	\$24.00		Clear Transaction
10 NOV 2...	10:33 AM	RETRIEVE TRANS: Hold Description: FOR L...	4	ONE, STAFF EXA...			Retrieve transaction
10 NOV 2...	10:33 AM	HOLD TRANS: Hold Description: FOR LATER	4	ONE, STAFF EXA...			Hold transaction
10 NOV 2...	10:21 AM	SECURITY GROUP CHANGE: Staff member ...	251	ONE, STAFF EXA...		BOOKINGS	Staff Security Group Assignment
10 NOV 2...	9:26 AM	DELETE TRANS LINE: ProductCode: S1102 ...	0	ONE, STAFF EXA...			Delete transaction line

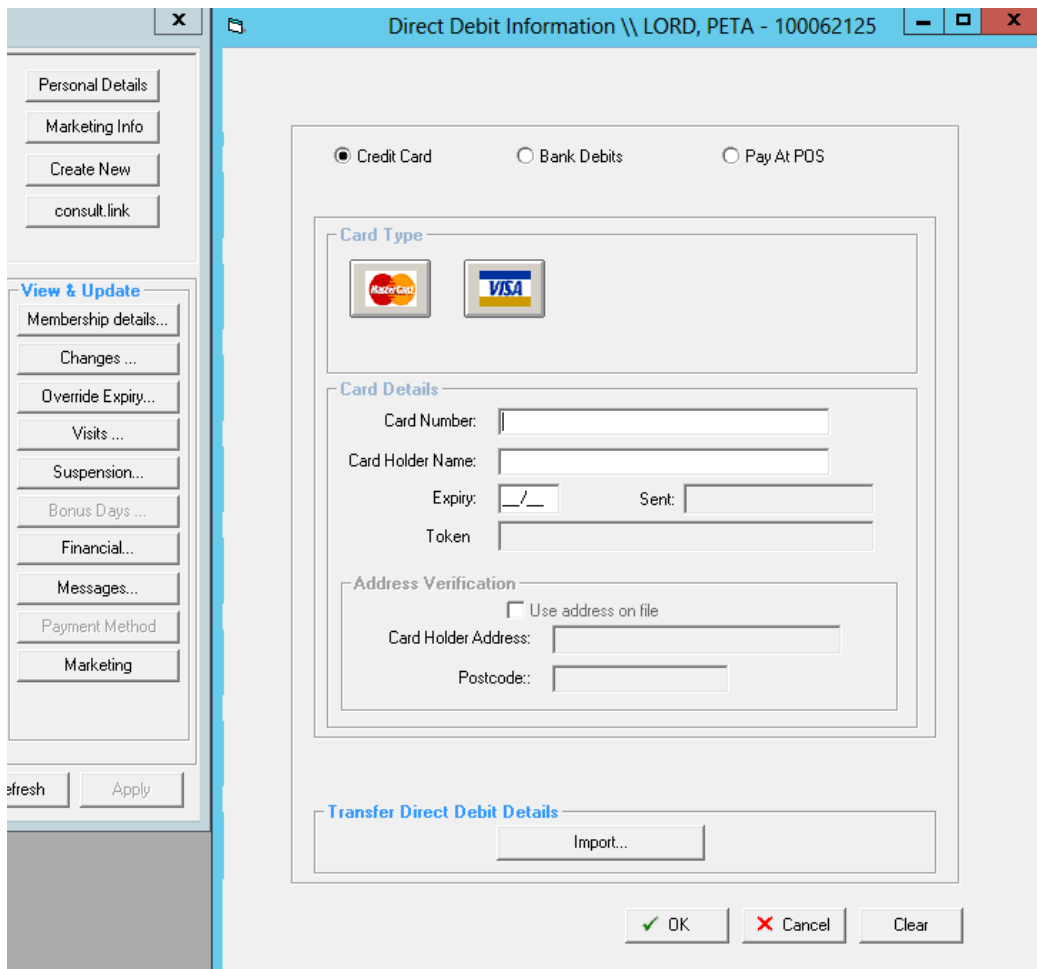
## Ability to limit which PC's can enter Customers Direct Debit details in Links

For additional security measures, the entering of direct debit details into Links can now be restricted per PC/Host. This setting is in addition to any Staff Security group settings in Admin > Security > Security Groups.

This setting is enabled Admin > Setup PC > Setup PC

Setup PC Parameters	
Access Point Name:	LOC1 RECEPTION
<input type="checkbox"/> Can Email <input type="checkbox"/> Play Sounds <input checked="" type="checkbox"/> Can Enter Debit Details	Gantner <input type="checkbox"/> Read/Writer Attached <input type="checkbox"/> Serial    FID: <input type="text"/> <input type="radio"/> Legic <input type="radio"/> MiFare    MiFare key: <input type="text"/>

For a PC that does not have this setting enabled the following is shown in the Members and Classes modules when looking at existing details.




## Ability to increase Stock items Globally and by an Incremental Amount

The Bulk Price Update screen can now apply price changes globally by clicking the 'Select All' checkbox. It can also apply an incremental increase across the Products in addition to a percentage change. This is done through Admin> Products/Services> Bulk Price Update.

**Product Type**  
☒ Product  
☐ Service  
☐ Membership  
☐ Visit Pass

**Location**  
☒ LOC1  
☒ LOC2  
☒ LOC3  
☒ LOC4

☒ **Select All**

**Store:**

**Changes Effective**  
☐ Now  
☐ On date

**Apply Percentage to Price**  
☐ increase by  %   
☐ decrease

**Apply Change to Price**  
☐ increase by    
☐ decrease

	Product Code	Description	Location	Store	Effective Date	Retail Price, \$
▶	9319868746946	Mens Vapor Tank_Black_Small	LOC1	LOCATION 1 STORE		29.99
	9319868746953	Mens Vapor Tank_Black_Medium	LOC1	LOCATION 1 STORE		29.99
	9319868746960	Mens Vapor Tank_Black_Large	LOC1	LOCATION 1 STORE		29.99
	9319868746977	Mens Vapor Tank_Black_Xlarge	LOC1	LOCATION 1 STORE		29.99

## Reporting Changes

### Date of Birth added to the New Enrolment Report

A Students Date of Birth now displays in the New Enrolment Report.

**New Enrolments**  
Between 02 Nov 2017 and 10 Nov 2017

Class Type	Class Level	Stud Id	Stud DOB	Surname	Given Name	Home Phone	Work Phone	Email	Address	Suburb
SSTPA2	Mon 11:00 Sch-SH A18 TENCH, TANIA	100015218	23/02/1998	DIXON	REECE	03 9938 4567	03 9938 4567	testcustomer100015218@papercut.com	9 NEWSOM ST	ASCOT VALE
SSTPA2	Mon 11:45 Sch-CF A61 OCONNOR, RUSSELL	10001569	23/02/1998	COLUSSI	ELLA	03 9938 4567	03 9938 4567	testcustomer10001569@papercut.com	9 NEWSOM ST	ASCOT VALE
SSTPA2	Mon 11:45 Sch-DU A24 PEPPER, MITCHELL	100015969	23/02/1998	DALTON	MADELIN E	03 9938 4567	03 9938 4567	testcustomer100015969@papercut.com	9 NEWSOM ST	ASCOT VALE
	Mon 11:45 Sch-CF							testcustom	9	ASC

### Ability to Export Sales Category by Tender by All Locations with Location Breakdown

There is now the ability to export the Sales Category by Tender Report by all Locations. Once this is exported it will display a separate GL Row per Location.

**Sales Category by Tender Report**

The Report is only valid for Transactions entered post the Links 8.15 Upgrade.

Location: <<All>>

**Selection Criteria**

Category:

Select Sub Categories or Leave Blank for all

Sub Category

Select Sub Categories

**Select Dates**

From Date: 13 JUL 2017 To Date: 10 NOV 2017

Start Time: End Time:

**Additional Options**

☐ Display Product Details

☐ Include GST in Totals

☒ Show zero value columns  
(turn off to save space for print/preview)

☐ Breakdown by Location (export only)

Print

Export

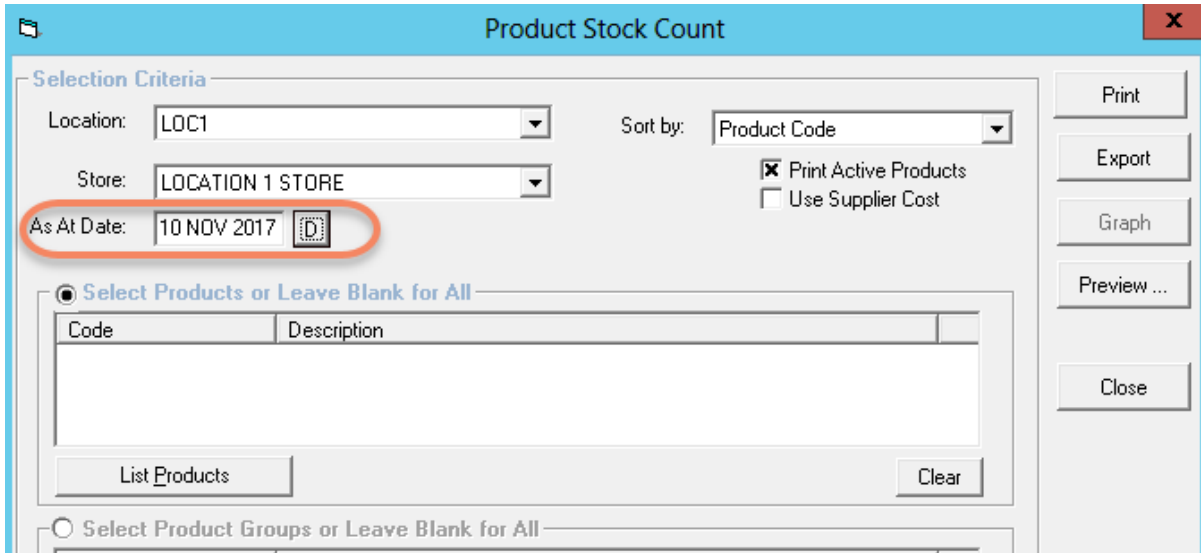
Graph

Preview ...

Close

## Product Stock Count Report Addition

You can now this report for an 'AS AT' date which will exclude any activity since that date giving a true figure for the period.



The screenshot shows the 'Product Stock Count' window. Under 'Selection Criteria', the 'Location' is 'LOC1', 'Store' is 'LOCATION 1 STORE', and 'Sort by' is 'Product Code'. The 'As At Date' is '10 NOV 2017', which is circled in red. There are checkboxes for 'Print Active Products' (checked) and 'Use Supplier Cost' (unchecked). On the right, there are buttons for 'Print', 'Export', 'Graph', 'Preview ...', and 'Close'. Below the criteria, there is a section titled 'Select Products or Leave Blank for All' with a table with columns 'Code' and 'Description'. At the bottom, there are 'List Products' and 'Clear' buttons, and a section titled 'Select Product Groups or Leave Blank for All'.

## Ability to run an Aged Debtors Listing report by Location

There is a new report that allows outstanding invoice accounts to be displayed on a Location by Location basis.

The report looks at the Location a transaction was processed at to determine which Location has created the debt.

Any invoice payments are accrued against the location of the invoice regardless of where the payment was made.

NOTE: If an invoice is made up of charges from multiple Locations the payment will accrue against each Location in the invoice as we do not allocate invoice payments to invoice lines in Links.

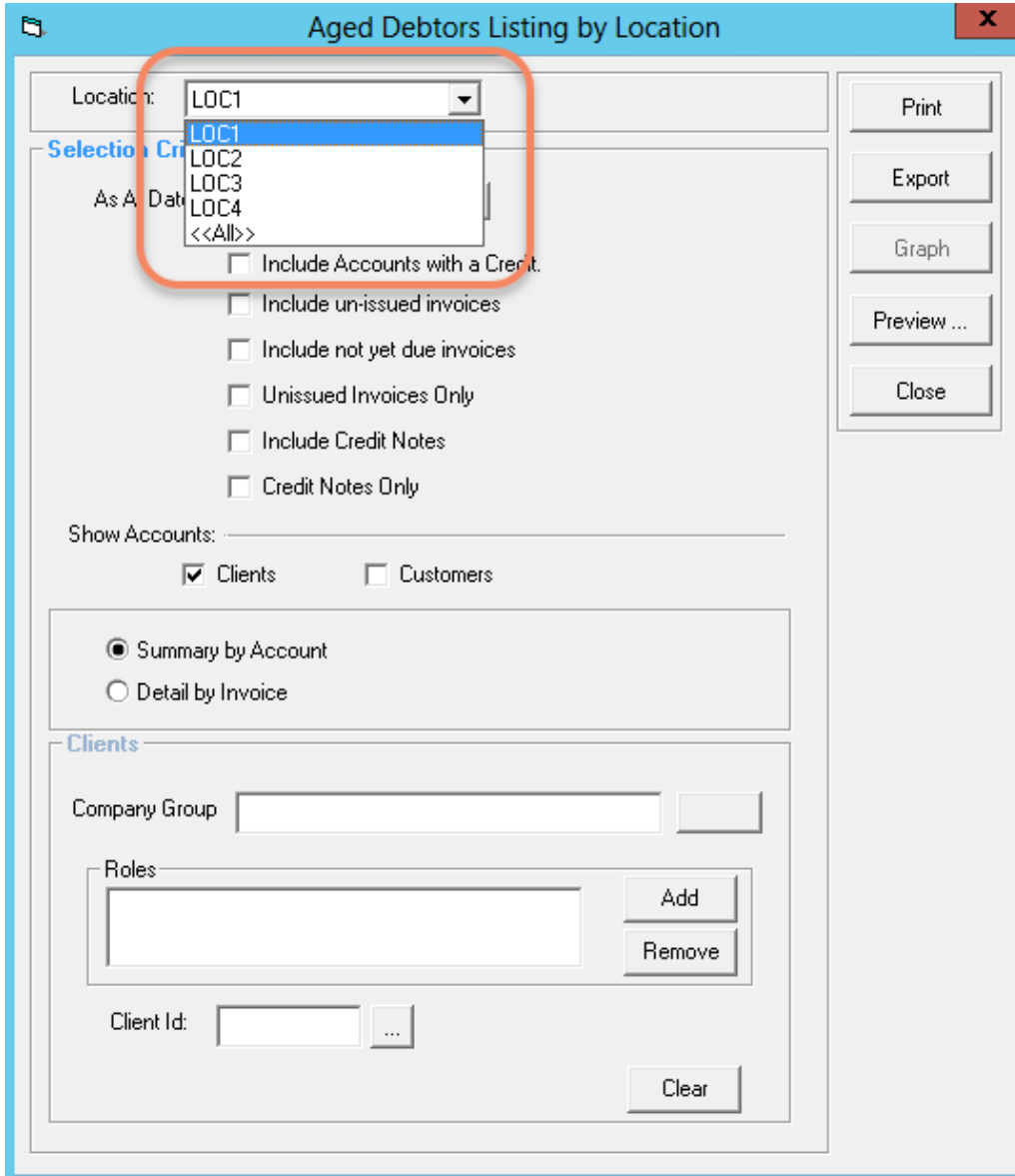
For example:

- Customer 1 makes a \$2.50 purchase on account at Location 1.
- Customer 1 makes a \$9.80 purchase on account at Location 2.
- Running the report at Location 1 will show the customer owes \$2.50.
- Running the report at Location 2 will show the customer owes \$9.80.
- Running the report for "All" Locations will show the customer owes \$12.30.

Now the customer makes a \$5.00 payment against the account at Location 1.

We do not allocate payments to charges, so the following is done:

- Running the report at location 1 will show the customer owes -\$2.50.
- Running the report at location 2 will show the customer owes \$4.80.
- Running the report for "All" locations will show the customer owes \$7.30.



The printed format will display and print as shown below

Summarised Aged Debtors Listing - Finance Clients

Aged Debtors Listing as at: 10 NOV 2017 Site: <<All>>

Account	Debtor	Total	Unissued	Current	30 Days	60 Days	90 Days +
2	EXAMPLE CLIENT 1	6,706.00	0.00	0.00	0.00	0.00	6,706.00
3	EXAMPLE CLIENT 2	1,120.00	0.00	0.00	0.00	0.00	1,120.00
TOTAL:		7,826.00	0.00	0.00	0.00	0.00	7,826.00

**\*\* Note:** The Total Due does not include any Account Credits.

**\*\*\* End of report \*\*\*\***

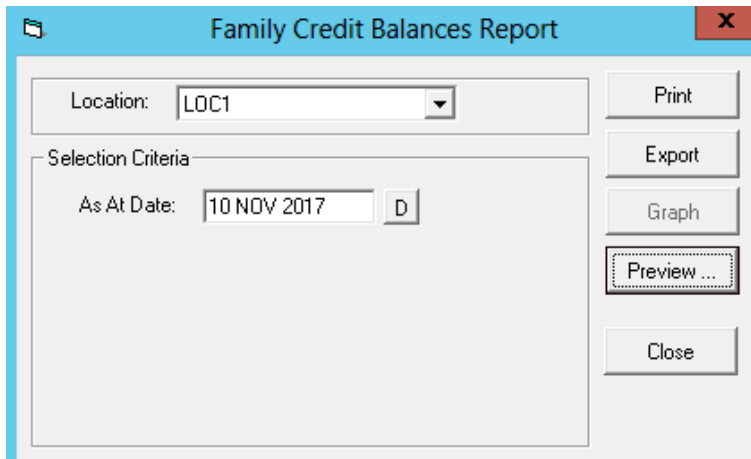


The Export format will display as shown below

	A	B	C	D	E	F	G	H	I
1	Location	Account	Debtor	Total	Unissued	30 Days	60 Days	90 Days	90 Days +
2	LOC4	2	EXAMPLE	6706	0	0	0	0	6706
3	LOC4	3	EXAMPLE	1120	0	0	0	0	1120
4									
5		TOTAL:		7826	0	0	0	0	7826
6									

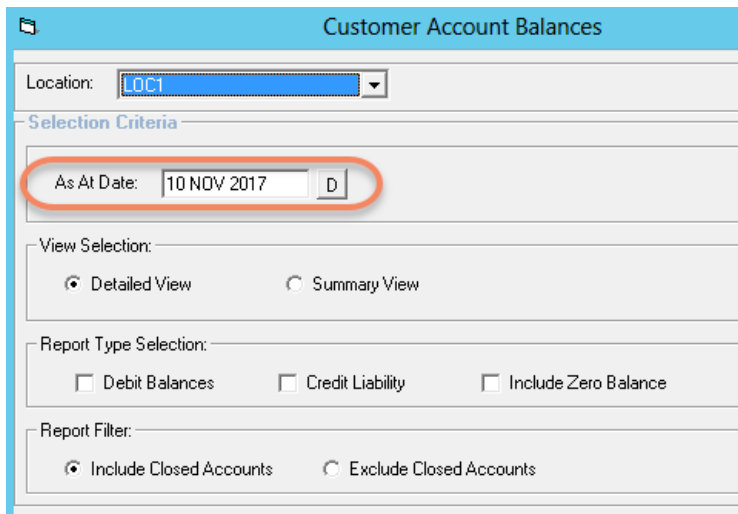
### Family Credit Balances Report

There is now a report to get a list of Family Credit balances by Location or for all Locations. † is located under Reporting> Classes> Financial> Family Credit Balances. A valuable feature of this report is that it can be run at an 'AS AT' date.



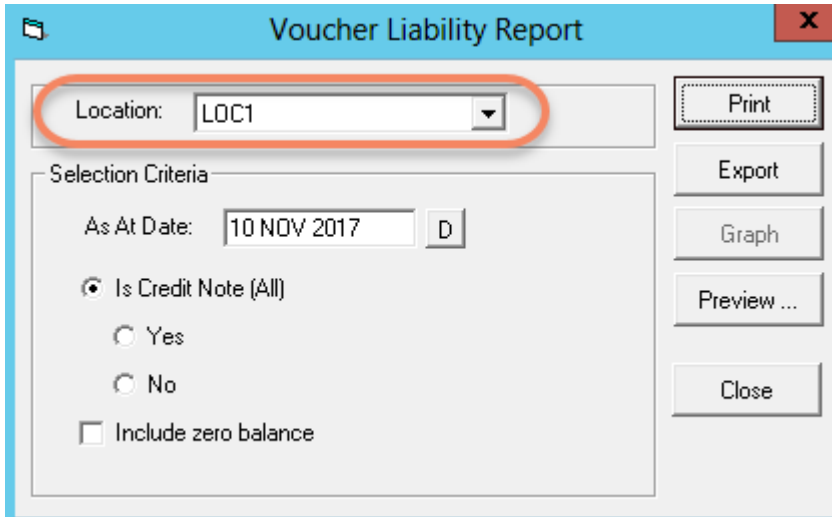
### Customer Account Balances Report Addition

The Customer Account Balances report now has the ability to run at an 'AS AT' date.



### Voucher Liability Report Addition

The Voucher Liability report now has the ability to filter by location (where the voucher is sold) and includes an 'As AT' date input:



**Voucher Liability Report**

Location: LOC1

Print

Export

Graph

Preview ...

Close

Selection Criteria

As At Date: 10 NOV 2017 D

☒ Is Credit Note (All)

☐ Yes

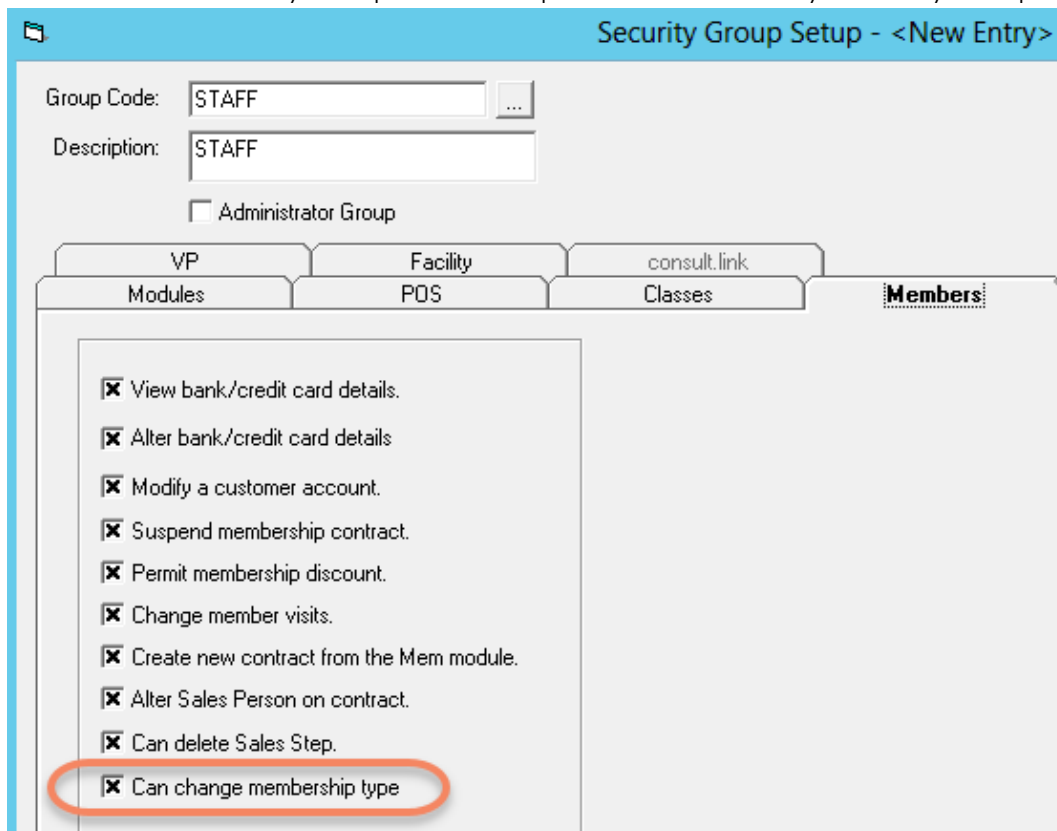
☐ No

☐ Include zero balance

## Members Changes

### Membership Downgrades/Upgrades

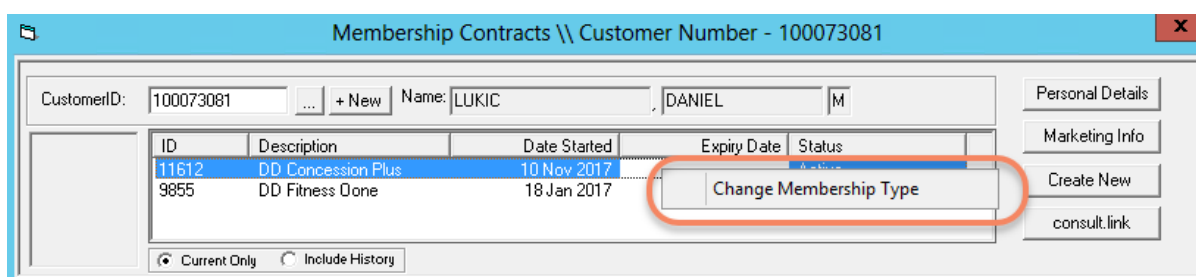
There is now the ability to allow staff to upgrade or downgrade a perpetual membership based on their Security Group. This is set up via Admin> Security> Security Group> Members.



The screenshot shows the 'Security Group Setup - <New Entry>' window. At the top, there are input fields for 'Group Code' (STAFF) and 'Description' (STAFF), with an 'Administrator Group' checkbox below them. Below these fields is a tabbed interface with tabs for 'VP', 'Facility', 'consult.link', 'Modules', 'POS', 'Classes', and 'Members'. The 'Members' tab is selected, showing a list of permissions with checkboxes. The checkbox for 'Can change membership type' is circled in red.

Permission	Checked
View bank/credit card details.	<input checked="" type="checkbox"/>
Alter bank/credit card details	<input checked="" type="checkbox"/>
Modify a customer account.	<input checked="" type="checkbox"/>
Suspend membership contract.	<input checked="" type="checkbox"/>
Permit membership discount.	<input checked="" type="checkbox"/>
Change member visits.	<input checked="" type="checkbox"/>
Create new contract from the Mem module.	<input checked="" type="checkbox"/>
Alter Sales Person on contract.	<input checked="" type="checkbox"/>
Can delete Sales Step.	<input checked="" type="checkbox"/>
Can change membership type	<input checked="" type="checkbox"/>

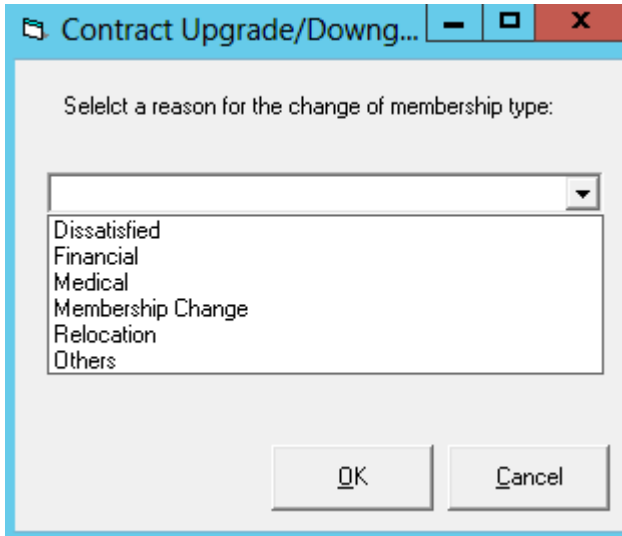
Staff that are able to process the changes, can do this by right clicking on the membership contact they wish to change.



The screenshot shows the 'Membership Contracts \ Customer Number - 100073081' window. At the top, there are input fields for 'CustomerID' (100073081), 'Name' (LUKIC, DANIEL), and 'M'. Below these fields is a table with columns: ID, Description, Date Started, Expiry Date, and Status. The table contains two rows: ID 11612, Description DD Concession Plus, Date Started 10 Nov 2017, and ID 9855, Description DD Fitness Done, Date Started 18 Jan 2017. A right-click context menu is open over the first row, with the option 'Change Membership Type' circled in red. On the right side of the window, there are buttons for 'Personal Details', 'Marketing Info', 'Create New', and 'consult.link'.

ID	Description	Date Started	Expiry Date	Status
11612	DD Concession Plus	10 Nov 2017		
9855	DD Fitness Done	18 Jan 2017		

This will then prompt them for a change reason.



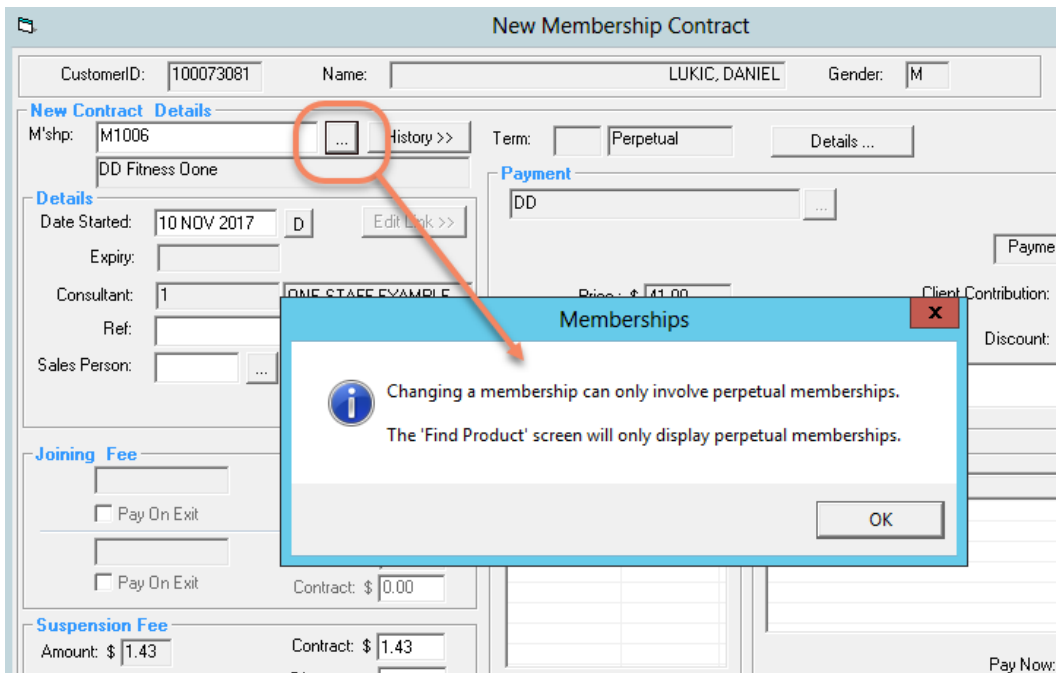
Contract Upgrade/Downgrade

Select a reason for the change of membership type:

Dissatisfied  
 Financial  
 Medical  
 Membership Change  
 Relocation  
 Others

OK Cancel

Choose a new Membership Contract to move to. Please note that this can only be for a move from a perpetual contract to a perpetual contract.



New Membership Contract

CustomerID: 100073081 Name: LUKIC, DANIEL Gender: M

**New Contract Details**

M'shp: M1006 ... History >> Term: Perpetual Details ...

DD Fitness Done

**Details**

Date Started: 10 NOV 2017 D Edit Link >>

Expiry:

Consultant: 1 ONE STAFF EXAMPLE

Ref:

Sales Person:

**Payment**

DD

Price: \$ 41.00

Client Contribution:

Discount:

**Joining Fee**

Pay On Exit

Pay On Exit

**Suspension Fee**

Amount: \$ 1.43 Contract: \$ 1.43

Contract: \$ 0.00

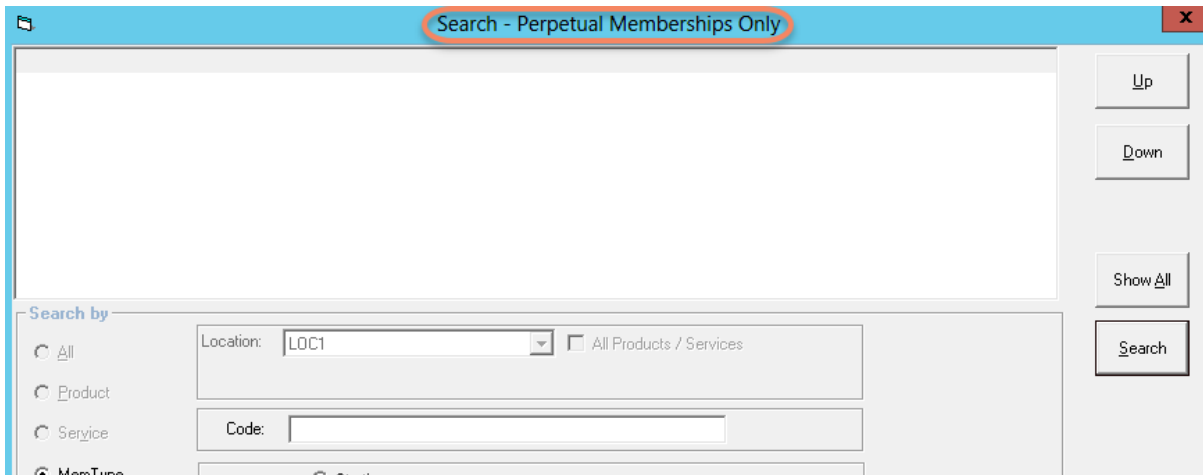
Pay Now:

**Memberships**

Changing a membership can only involve perpetual memberships.  
 The 'Find Product' screen will only display perpetual memberships.

OK

Only perpetual contracts will show in the search screen.



Search - Perpetual Memberships Only

Search by

☐ All

☐ Product

☐ Service

☒ MemTune

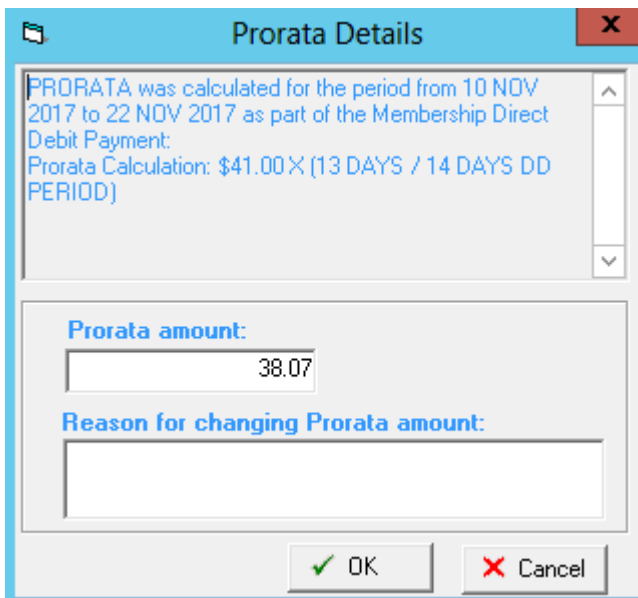
Location: LOC1 ☐ All Products / Services

Code:

Show All

Search

After selecting the new contract an Old Contract pro rata amount is calculated. This is the amount of credit from the cancelling contract that is moving to the new contract.



Prorata Details

PRORATA was calculated for the period from 10 NOV 2017 to 22 NOV 2017 as part of the Membership Direct Debit Payment:

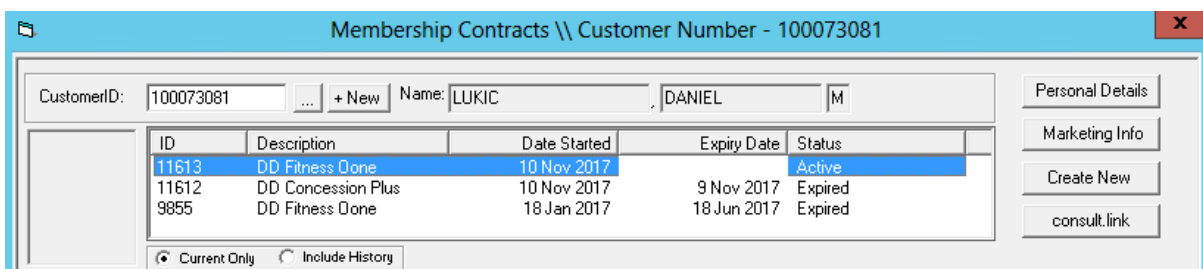
Prorata Calculation: \$41.00 X (13 DAYS / 14 DAYS DD PERIOD)

Prorata amount: 38.07

Reason for changing Prorata amount:

OK Cancel

All debit details, or contract references are moved from the cancelling contract to the new contract



Membership Contracts \ Customer Number - 100073081

CustomerID: 100073081 ... + New Name: LUKIC, DANIEL M

ID	Description	Date Started	Expiry Date	Status
11613	DD Fitness Done	10 Nov 2017		Active
11612	DD Concession Plus	10 Nov 2017	9 Nov 2017	Expired
9855	DD Fitness Done	18 Jan 2017	18 Jun 2017	Expired

☒ Current Only ☐ Include History

Personal Details

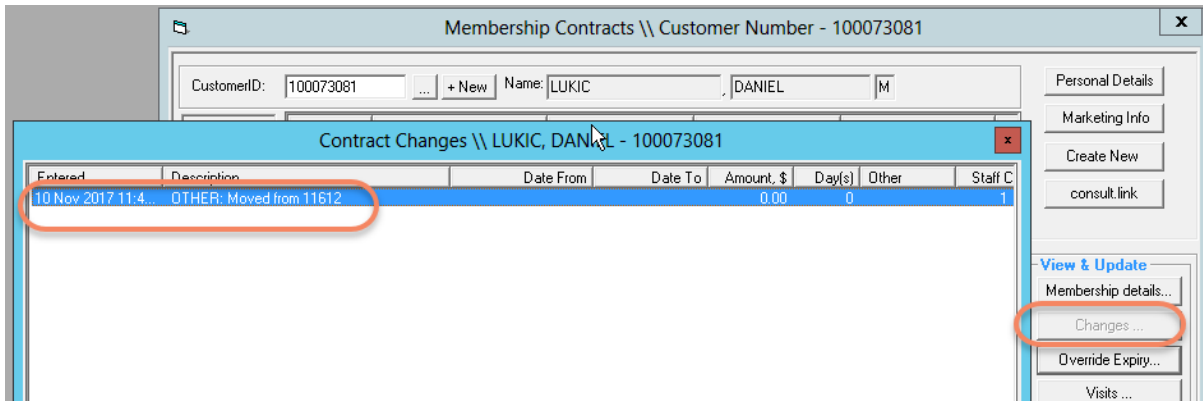
Marketing Info

Create New

consult.link

Logs are saved in the Contract Changes regarding the upgrade/downgrade

Destination contract



Membership Contracts \ Customer Number - 100073081

CustomerID: 100073081 + New Name: LUKIC, DANIEL M

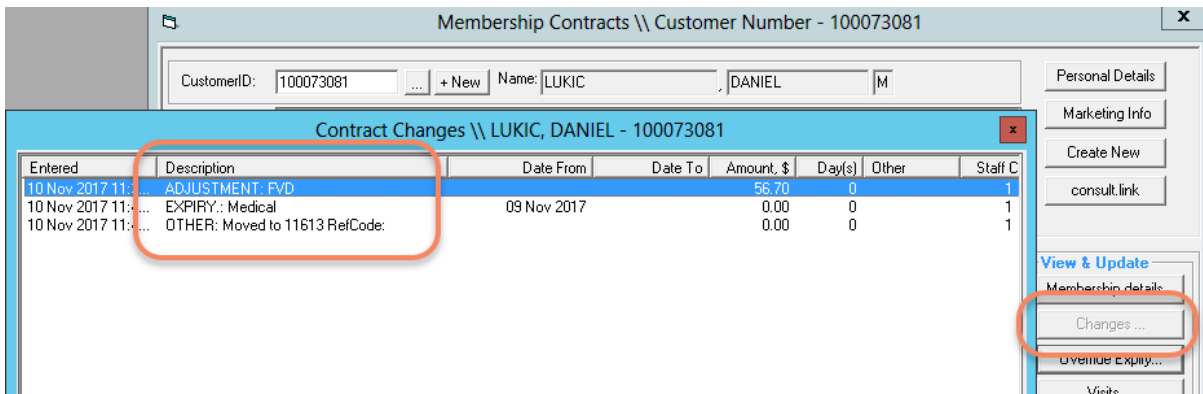
Contract Changes \ LUKIC, DANIEL - 100073081

Entered	Description	Date From	Date To	Amount, \$	Day(s)	Other	Staff C
10 Nov 2017 11:4...	OTHER: Moved from 11612			0.00	0		1

Personal Details  
Marketing Info  
Create New  
consult.link

View & Update  
Membership details...  
**Changes ...**  
Override Expiry...  
Visits ...

Original contract



Membership Contracts \ Customer Number - 100073081

CustomerID: 100073081 + New Name: LUKIC, DANIEL M

Contract Changes \ LUKIC, DANIEL - 100073081

Entered	Description	Date From	Date To	Amount, \$	Day(s)	Other	Staff C
10 Nov 2017 11:...	ADJUSTMENT: FVD			56.70	0		1
10 Nov 2017 11:...	EXPIRY: Medical	09 Nov 2017		0.00	0		1
10 Nov 2017 11:...	OTHER: Moved to 11613 RefCode:			0.00	0		1

Personal Details  
Marketing Info  
Create New  
consult.link

View & Update  
Membership details...  
**Changes ...**  
Override Expiry...  
Visits ...

The change is also recorded to the Audit log.

Audit Log

Filter options

From: 3 NOV 2017 D

To: 10 NOV 2017 D

Display Only:

Topic

☐ LOGIN
 ☐ MEMBERS - CHANGE ADJUSTMENT
 ☐ MEMBERS - CHANGE EXPIRY
 ☒ MEMBERSHIP CHANGE
 ☐ PRINT PREV RECEIPT

☐ Select All

Date	Time	Description	Record	Staff Member	Old Value	New Value	Reason
10 NOV 2...	11:43 AM	MEMBERSHIP CHANGE: AuthStaffid 1 Move...	11613	ONE, STAFF EXA...	0	0	Membership Change

Details

i

Staff Member: ONE, STAFF EXAMPLE

MEMBERSHIP CHANGE

AuthStaffid 1 Moved from 11612 DD Concession Plus Moved to 11613 DD Fitness Oone

Record: 11613

Reason: Membership Change

On Host machine:

OK