Links Modular Solutions

Version 2015.2 Release Notes

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|--|-----|
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## New Login Screen, Home screen and Toolbar

#### **New Login Screen**

The login screen has had a makeover.



### **New Home Screen**

The home screen has been updated providing extended functionality along with the updated icons for the Links Modules.





There is now a recent activity list where users can easily get back to screens they have recently had open.

Additionally the user can hover over key modules to get a sub-menu.

| Recent Activity                     | Featured Items |                         |
|-------------------------------------|----------------|-------------------------|
| Customer Setup // JONES, INDIANA    | POS/Facility > | Visual Scheduler        |
| Accounts                            | Stock >        | Daily Attendances       |
| Visual Scheduler - All Class Types  | Members >      | Daily Classes           |
| View Customer Contracts             | Classes >      | Cancel Student Bookings |
| Enquiry Manager                     | Reporting      | Web To Do               |
| Visual Facility Bookings - 50M Pool | Admin          | View Student Wait List  |
| Visual Facility Bookings - AC TRIAL | Access         | Wait List Requests      |
| Visual Facility Bookings - AC TRIAL |                | Student Details         |
|                                     |                | Families                |
|                                     |                | Teachers Absences       |

## New Toolbar

There is now a tool bar that can be activated in the top left of the screen when Links is active by hovering the mouse over a launch pixel. The menu options will be the same as the module menu on the home screen with the addition of Recent and Booking options.

| 🛐 🗕                |   |                 |                          | Links I        | Aodular Soluti | ons | <b>– – ×</b>      |
|--------------------|---|-----------------|--------------------------|----------------|----------------|-----|-------------------|
| POS/Facility       | > | Welcome To      | - 1                      |                |                |     | Links             |
| Stock              | > | Localic         | on I                     |                |                |     | MODULAR SOLUTIONS |
| Members            | > | Recent Activi   | ty                       | Featu          | red Items      |     |                   |
| Classes            | > | Customer Setup  | o - <new entry=""></new> |                | POS/Facility   | >   |                   |
| Reporting          |   | Facility Calend | ar                       | 8.             | Stock          | >   |                   |
| Admin              |   | Accounts        |                          | മ്പ്           | Members        | >   |                   |
| Access             |   |                 |                          | 67             | Classes        | >   |                   |
| Recent             | > |                 |                          | <b>~</b>       | Reporting      |     |                   |
| Bookings           | > |                 |                          |                | Admin          |     |                   |
| 2                  |   |                 |                          |                | Access         |     |                   |
| Mozilla<br>Firefox |   |                 |                          |                |                | _   |                   |
|                    |   |                 |                          |                |                |     |                   |
| tlook 2013         |   |                 |                          |                |                |     |                   |
|                    |   |                 |                          |                |                |     | Welcome to Links  |
| w 🔳                |   | Change Location | Use Training Mode        | Toolbar Config |                |     | About Links       |



The toolbar can be activated by the Toolbar Config button on the bottom of the module screen. The hook size is the size of the launch pixel that will activate the tool bar, 1 is the smallest launch size.

|   | Image: A start a st |    |
|---|---|----|
| 1 | *   |    |
|   |   | OK |
|   | 1   | 1  |

Toolbar Config



## **POS Changes**

### New Look and Screen Resize

The POS screen has a new look and will now re-size anywhere from 1024 x 768 screen resolution to a full screen.

|                                |                                  |                               |  | pos.                   | link - [Point of Sale]                          |                            |                    |   |                  | - 0 ×     |
|--------------------------------|----------------------------------|-------------------------------|--|------------------------|---|----------------------------|--------------------|---|------------------|-----------|
| S File Till Facility Maintair  | Customers Retention Appo         | ointments consult.link Messag | jes Help                                 |                        |   |                            |                    |   |                  | - 8 -     |
| Current Transaction            | Previous                         | Total \$                      | S Transaction<br>Change \$<br>Quantit    | y Amount 1             | No visits today                                 | Visits Today Picture+      | Fun<br>oper<br>but | ctions Butt<br>ns up to Lai<br>tons and c | on<br>rger<br>an | Functions |
|                                | Transaction<br>has been<br>moved |                               | Total for the                            |                        |   | Previous<br>visits has     | ch Sec             | limited vi<br>curity Grou                 |                  | Hold      |
| Full Access Direct             | Aquatic Visit Passes             | Bookings                      | transactions<br>has moved<br>from top of | Total S<br>Merchandise | S<br>Casual Health Club                         | Adult Swim                 | Credit Card        | Layb                                      | y/ Split         | Retrieve  |
| Full Access Adult 12<br>Months | Gym Visit Passes                 | Booking Attendence            | Screen                                   | t Kiosk                | Larger po<br>tender<br>that ho                  | ayment<br>types<br>us also | EFTPOS             | Custome                                   | r Account        |           |
| Pool 20 Visit - Adult          | Group Fitness                    | Booking Payment               | Student Search                           |                        | repositi  | en<br>ioned<br>(\$0.00)    | 7                  | 8   | 9                | %         |
|                                |                                  |                               | Family Search                            |                        | Larger Keypa<br>multiple sale<br>well as bigger | ad for<br>es as<br>quick   | 4                  | 5   | 6                | x         |
|                                |                                  |                               |  |                        | cash options<br>selecting th                    | when<br>e \$               | 1                  | 2   | 3                | <<        |
|                                |                                  | Customer Account<br>Sale      | Clear Transaction                        | Print Previous Receipt | No Sale   | Тор                        |                    | 0   |                  | \$        |

The previous visits screen and the previous transactions view have been repositioned which allows for the enlargement of the Tender and keypad buttons.

The Functions button now opens up on top of the tender and keypad buttons instead of another screen. If you do not choose an option and wish to return to the tender and keypad buttons the Exit button can be selected.





#### Function and Hold/Retrieve Buttons Lockdown

The use of the Function and Hold/Retrieve buttons can now be restricted via Security Groups. Within the Security Group set up, there are two options

- Can use POS Function Keys
- Can use POS Hold/Retrieve Transaction Keys

If these aren't selected, the user will not be able to use the Function and/or Hold/Retrieve buttons. This can be turned on in Admin> Security> Security Groups.

| VP                                | Facility                          |  |  |  |
|-----------------------------------|-----------------------------------|--|--|--|
| Modules                           | POS 📋                             |  |  |  |
|                                   |                                   |  |  |  |
| 🔲 Can void a transacti            | on.                               |  |  |  |
| Can modify products               | /services master                  |  |  |  |
| Can modify products               | /services.                        |  |  |  |
| 🗌 Can override refund             | maximum.                          |  |  |  |
| 🗌 Can save changes t              | o accounts.                       |  |  |  |
| 🗌 Can override automa             | atic voucher number.              |  |  |  |
| 🗌 Can open cash draw              | ver without sale.                 |  |  |  |
| 🗌 Can give discounts.             | Can give discounts.               |  |  |  |
| 🔽 Can sell Membership Contract.   |                                   |  |  |  |
| Can make transaction adjustments. |                                   |  |  |  |
| Add/Change Suburb                 |                                   |  |  |  |
| 🔲 May set up Custome              | r Accounts                        |  |  |  |
| 🔲 Endorse a Customer              | Account Void or Return            |  |  |  |
| 🔲 May view Customer /             | May view Customer Account DD Info |  |  |  |
| May alter Customer A              | Account DD Info                   |  |  |  |
| 🔲 Can Modify Transac              | tion No in Till Off               |  |  |  |
| 🔲 Can use POS Functi              | ion Keys                          |  |  |  |
| Can use POS Hold/I                | Retrieve Transaction Keys         |  |  |  |
| 🔽 Can Unissue Invoice             | es                                |  |  |  |

If staff do not have the correct security access, the buttons are greyed out on the POS screen for these staff.

|             |                      | _ 0 ×     |
|-------------|----------------------|-----------|
|             |                      | - 8       |
| Cash        | Voucher/ Credit Note | Functions |
| Cheque      | Account              | Hold      |
| Credit Card | Layby/ Split         | Retrieve  |



## Simple Refunds

A Simple Refund allows you to setup a refund button on your POS layout, this allows staff to enter the amount required to refund upon selection of the button.

To enable this, you need to setup a new Service with \$0 price.

| Service Setup  | ×                 |
|--|-------------------|
| Service       Code:     \$1020       Description:     Parking Refund   ACTIVE                          | 55                |
| Pricing Reporting Comments Grouping Activities Prerequisites   |                   |
| ☐ Stop Override<br>☐ Require User Login on Sale<br>☐ Require Customer/Casual<br>☐ Always print receipt |                   |
|  | Save Delete Clear |

Once set up, this can then be added as a 'Product' through POS> Till> Touch Screen Layout.

| 8  | Touchscreen Button Setup                      |
|--|---|
| Product     Product Group     Text     Link     Link | Colors       Font     Available Times         |
| C Discount<br>C Touch Layout<br>C Kit                | Product: S1020<br>Description: Parking Refund |
|  | Parking<br>Refund                             |
|  | Clear V OK X Cancel                           |

When the Service is then selected, a prompt for Refund option is made available and the user is immediately prompted to enter an amount.



| Current Transaction            |                      | Previous           | Transaction           |          |          |                      | Previo                          | us Visits        |               |                   |
|--------------------------------|----------------------|--------------------|-----------------------|----------|----------|----------------------|---------------------------------|------------------|---------------|-------------------|
|                                |                      | Total \$ 50        | Chang                 | e\$      |          | Vie                  | w No visit                      | s today          | ^             | Visits Today      |
| Description                    |                      |                    | (                     | Quantity |          | Amount \$            |                                 |                  |               | Distance          |
| Parking Refund                 |                      |                    |                       | 1        |          | 0.00                 |                                 |                  |               | Ficure            |
|                                |                      |                    |                       |          |          | Total \$             |                                 |                  | ~             |                   |
| Full Access Direct             | Aquatic Visit Passes | Bookings           | Swim Scho<br>Bookings | ol       | Mercl    | nandise              | Casual Hea<br>(\$20.            | alth Club<br>00) | Adu<br>(\$    | It Swim<br>6.00)  |
| Debit                          |                      |                    |                       | 8        |          |                      | Enter Price                     |                  |               | X                 |
| Full Access Adult 12<br>Months | Gym Visit Passes     | Booking Attendence | Swim School P         | Ent      | ter Pric | e of Par<br>Price \$ | king Ref<br>5 <mark>0.00</mark> | fund             | <u>0</u> K    |                   |
| Pool 20 Visit - Adult          | Group Fitness        | Booking Payment    | Student Sea           |          |          |                      | 74                              | 8 9<br>5 6       | ) %<br>5 X    |                   |
|                                |                      |                    | Family Sea            |          |          |                      |                                 | 0.               | \$            |                   |
|                                |                      |                    |                       |          |          |                      | STAFF DIS<br>25%                | COUNT<br>6       | Parkin<br>(\$ | g Refund<br>0.00) |

The amount will show as a refund in POS and can be refunded as normal.

| TILL 1 Current Transaction | Previous      | Transaction |               |
|----------------------------|---------------|-------------|---------------|
|                            | Total \$ 6.09 | Change \$   | View          |
| Description                |               | Quantity    | Amount \$     |
| Parking Refund             |               | 1           | -7.00         |
|                            |               |             | Total \$-7.00 |



## Discount Reason Pre-populates

If you use the discount button in POS, the button label now fills into the Discount Reason box along with the % when selected.

| Ba         | Links                      |                            |
|------------|----------------------------|----------------------------|
| Discount R | leason:                    | Under 2 Swim<br>(\$0.00)   |
| STAFF DI   | COUNT 252<br>✓ OK X Cancel |                            |
|            | STAFF DISCOUNT<br>25%      | Parking Refund<br>(\$0.00) |

When setting up the POS discount button from POS> Till> Touch Screen Layout and select the discount option, ensure that you enter the button label as to what will be the discount reason.

| Layout for Window: LargeTouch<br>Layout ld: CDS<br>Description: CDS | Clear<br>Clear Display Pri     | Delete               |                       |  |   |                                   |    |                |
|---|--------------------------------|----------------------|-----------------------|--|---|-----------------------------------|----|----------------|
| ⊞- Top Layer  | Full Access Direct<br>Debit    | Aquatic Visit Passes | Bookings              | Swim School Bookings   | : Merchandise                                   | Casual Health Clu                 | ub | Adult Swim     |
|   | Full Access Adult 12<br>Months | Gym Visit Passes     | Booking Attende       | nce Swim School Payment  | t Kiosk<br>hscreen Button Setup                 | ×                                 |    | Child Swim     |
|   | Pool 20 Visit - Adult          | Group Fitness        | Booking Paym          | C Product<br>C Product Group                                   | Font Available Times                            | New Color                         |    | Under 2 Swim   |
|   |                                |                      |                       | C Function<br>C Discount Dis<br>C Touch Layout<br>C Kit Button | scount: 25 %                                    |                                   |    |                |
|   |                                |                      |                       | STAE   | Discount lines that are     Require Customer/Ca | : already discounted<br>sual<br>2 | 5% | Parking Refund |
|   |                                |                      | Customer Acco<br>Sale |  | 25%   | 8                                 |    | Тор            |
|   |                                |                      |                       |  |   |                                   |    | Close          |



## **Credit Card Surcharge**

You now have the ability to set a surcharge per Credit Card type and assign a service code to track that income.

When the 'Credit Card' tender type is selected (or EFTPOS tender for LinksPOS or PC-EFTPOS clients) the below screen will prompt the user to select a Credit Card type and apply the relevant surcharge.

The 'Total to Pay' will be calculated and will be inclusive of the surcharge.

| 8             |             | Credit Card Details   | ×             |
|---------------|-------------|-----------------------|---------------|
| Card Type —   |             | 2001119200<br>ISOSIAR | Type:         |
| Surcharge:    | 1.50% 1.50% | 2.00%                 |               |
| Total         | 00.3*       |                       |               |
| Surcharge:    | \$0.09      |                       |               |
| Total to Pay: | \$6.09      |                       |               |
|               |             |                       | ✓ OK X Cancel |

Select 'OK' to finalise the transaction. Links will automatically add the applicable Credit Card surcharge line to the transaction.

| 🖻 Transa   | action Maintenance X  |
|--|---|
| Transaction       Id:     154       Find By Id       Till:     TILL 1       Date:     19 OCT |   |
| Product Description<br>S1000 Casual Adult Swim<br>S1019 Credit Card Surcharge                | Unit Price, \$ Qty Total, \$<br>6.00 1 6.00<br>0.09 1 0.09  |
|  | Void     Total GST: \$ 0.55       Pay Method     Rounding: \$ 0.00       Return/Refund     Grand Total: \$ 6.03       Print Receipt     Email Receipt |
| View Bookings Customer:  | Add Save Name   |
|  | Close   |



This can be set up in Admin> POS> Setup.

| 8   | Setup Point of Sa                         | ale                                 |  | X      |
|---|---|-------------------------------------|--|--------|
| General Products Categories Payment Options R   | Receipts   Laybys   Vouche                | s                                   |  |        |
| Payment Options<br>Cheques<br>Credit Card<br>EFTPOS<br>X Vouchers/Credit Notes<br>X Laybys<br>Account<br>Electronic Transfer<br>Alternate 1 | Credit Cards Accep<br>Card Type<br>Availa | ted<br>Surcharge?<br>ble X<br>ble X | Service Code Surchar<br>S1019 1.50<br>Credit Card Surcharge<br>S1019 1.50<br>Credit Card Surcharge | rge%   |
|   | Unava                                     | ailable 🗖                           |  | _%     |
| Gantner Currency Code: 61   | Availa                                    | ble 🛛 🕱                             | S1019 2.00<br>Credit Card Surcharge  | ~      |
| Card Limit: \$  100.00  | Other Availa                              | ble 🗖                               |  | _%     |
|   | ]   |                                     | Setup Services   |        |
|   |   |                                     | 🗸 ОК 📉 🗙 С   | Cancel |

Note: If you want the surcharge to appear at the bottom of the list of products on the receipt ensure you give it a Service code starting with Z during the Service setup process.

Also it is advisable to have 'Other' available as an accepted Credit Card type (especially if you are using PC EFTPOS). Just don't tick the Surcharge option, this can then be used to indicate when a card is used that doesn't require a surcharge (e.g. Bank card)

Links Modular Solutions recommend contacting your Tax Attorney and consulting your Merchant Services Agreement prior to implementing credit card surcharges.



## **Emailing POS Receipts**

POS receipts can now be emailed to Customers.

An 'Email Receipt' button has been added to the Transaction Maintenance screen as shown below.

| B Transaction Maintena   | nce  |
|--|--|
| Transaction       Id:     154       Find By Id       Till:     TILL 1       ▼     Date:       19 OCT 2015     D       Number | : <b>5 _</b> Time: 11:32 AM  |
| Product Description<br>S1000 Casual Adult Swim<br>S1019 Credit Card Surcharge  | Unit Price, \$ Qty Total, \$ 6.00 1 6.00<br>0.09 1 0.09                |
| Void Pay Method Return/Refund Print Receipt Email Receipt Name: Name:  | Total GST: \$ 0.55<br>Rounding: \$ 0.00<br>Grand Total: \$ 6.09<br>Add |
|  | Close  |

Click on the 'Email Receipt' button to open the Email Customer screen.

If the transaction has been assigned to a Customer with an email entered this email will appear by default. Alternatively an email address can be entered at the time of sending the email.

| B Email Customer  |      | x      |
|---|------|--------|
| Email To :  |      |        |
| Subject : Location 1 - Receipt #154                                   |      |        |
| BCC:  |      |        |
| Message:  |      |        |
| Merchant Demo Site<br>ABN: 123-456-789<br>TAX INVOICE<br>Till: TILL 1 |      | ^      |
| Credit Card Surcharge \$0.09<br>Casual Adult Swim \$6.00              |      |        |
| TOTAL 6.09  |      | =      |
| Payment Details.<br>Credit Card 6.09                                  |      |        |
| GST included in total \$0.55  |      |        |
| 154 19 Oct 2015 11:32:00 AM<br>REPRINT (19 Oct 2015 11:39:26 AM)      |      |        |
| <   |      | >      |
|   | Send | Cancel |



The email will be received in the recipient's inbox in the same format if the receipt had been printed.

| Reply       Reply All       Forward         Wed 21/10/2015 12:10 PM       support@linksmodularsolutions.com         Location 1 - Receipt #154 |
|---|
| Merchant: Demo Site<br>ABN: 123-456-789<br>TAX INVOICE<br>Till: TILL 1  |
| Credit Card Surcharge \$0.09<br>Casual Adult Swim \$6.00  |
| TOTAL 6.09  |
| Payment Details.<br>Credit Card 6.09  |
| GST included in total \$0.55  |
| 154 19 Oct 2015 11:32:00 AM<br>REPRINT (21 Oct 2015 12:10:03 PM)  |

Demo Site

Your Email for SMTP needs to be setup please see the Links Wiki if you need assistance in this setup. If you have already setup SMTP or you wish to use the local email on that computer then you will need to go to Admin> Setup PC> Setup for PC and select 'Can Email'.

| 8   | Setup PC Parameters  | x        |
|---|--|----------|
| Access Point Name<br>Can Email<br>Play Sounds | Gancertion   |          |
| Gene  | eral Visit Entry Point of Sale   |          |
| Birthday:                                     |  |          |
| Visit Message/OK:                             | · · · · · · · · · · · · · · · · · · ·  |          |
| Visit Warning:                                |  |          |
| Visit Error:                                  |  |          |
| Visit Count:                                  |  |          |
| First Lesson:                                 | · · · · · · · · · · · · · · · · · · ·  | <u>]</u> |
| Enter or locate the<br>WINWORD.EXE Path       | path to the Winword.exe     C:\Program Files (x86)\Microsoft Office\Office15\WINWORD.EXE |          |
| Enter or locate the                           | e path to the Links help file  |          |
| File Path:                                    | C:\Program Files\Links Modular Solutions\Links_Help.Hlp                                  | ]        |
|   | ✓ OK 🛛 🗡 Cano  | ;el      |



## Other Cost for Sessions is now available when the cost is set to \$0.00

Bookings can now be made using the 'Other Cost' option when the cost is set to \$0. Previously this booking option was only available if a cost greater than \$0 was entered.

| Sessions ×   |
|--|
| Find Existing Session Location:                        |
| General Schedule Accounting Memb./VP Types Class Types |
| Service Codes<br>Casuals: NDD                          |
| Members: NOD   |
| Cost<br>Casual: \$ 14.00                               |
| Other Cost<br>Cost: \$ 0.00 Labet                      |
|  |
| Save Delete Clear the Close                            |

| Mon<br>11/01/2016                         | Tue<br>12/01/2016   | Wed<br>13/01/2016  | Thu<br>14/01/2016   |
|---|---|--|---------------------|
| AQUA AEROBIC S<br>02:00 PM<br>( 19 / 20 ) | Details<br>Description: AC<br>Date & Time: Mc<br>Instructor: M/<br>Capacity: 20<br>Number Bookings: 1<br>Member Cost: \$1<br>Concession Cost: \$1<br>Other Cost: \$0<br>This session has started but can s<br>Person: | Session Booking<br>UA AEROBICS<br>nday, 11 January 2016 2:00:00<br>TT H<br>00<br>1.00<br>.00<br>00 | PM<br>View Bookings |
|   | Conce <u>s</u> sion <u>C</u> a  | sual <u>O</u> ther   | Cancel              |



## Postcode Survey can now be set by host (PC)

The Postcode Survey is now by host (PC) instead of all locations. The Postcode Survey is now in POS> Till> Setup.

| 🖻 Till Setup  | x |
|---|---|
| General Printer/Cash Drawer Appearance PC-EFTPOS  |   |
| Till:       TILL 1         Show Touch Keyboards       Session Bookings         Prompt for description on transaction hold       Focus on Casual Button         Print receipt from Cash button       Focus on Members         Postcode survey       Refresh visits in POS window (secs): |   |
| POS Screens         Keyboard Layout:         TouchScreen Layout:         COS         Image: Cost and Services   |   |
| Access Point Access Point Name: RECEPTION   |   |
| Card Present Transaction Processing           Has Card Device         Card Reader:  |   |
| PIN Device  |   |
| ✓ OK 🛛 🗙 Cance  |   |



### Reference Number field Mandatory in Customer Setup

The REF# field in the Customer Screen can now be a mandatory field. Once turned on staff will not cannot save the customer until completed.

| 8   | Customer Setup // JONES, INDIANA  | x            |  |  |  |  |
|---|---|--------------|--|--|--|--|
| Customer ID: 39 View Customer Account View Invoice Account  |   |              |  |  |  |  |
| Personal Details Last Name: JONES First Name: INDIANA Title: MR Gender Male Date of Birth: D Age: | Notes Status Sales History  Contact Details (default)  Address:  Cuburb:  Point of Sale  Please complete the following required field(s) and click on the SAVE button :  - Ref #: | ×            |  |  |  |  |
| Concession Date: D Partner Name:  | ОК  |              |  |  |  |  |
| Ref #:: 20/10/201<br>✓ Active Carrot Enabled 20/10/201<br>No cument cands                         | E-mail 1:   | Mail         |  |  |  |  |
| Setup<br>Letter Letter Issue card Marke   | ting Apply Save Delete Clear Clone (  | <b>Close</b> |  |  |  |  |

To turn this on go to Admin> Site> Mandatory Fields.

| 🗈 Mandatory Fields 💶 🗖 🗙   |                                  |  |  |  |  |  |  |  |
|--|----------------------------------|--|--|--|--|--|--|--|
| Customer Screen Prospect Screen  | Customer Marketing Screen Contra | ct Marketing Screen Client Marketing Screen  |  |  |  |  |  |  |
| Personal Details<br>Last Name<br>First Name<br>Gender<br>Date of Birth<br>Concession Date<br>Partner Name<br>Ref # | Contact Details                  | Emergency Contact 1<br>Name<br>Relationship<br>Phone<br>Mobile<br>Doctor<br>Dr. Name<br>Dr. Phone<br>Dr. Phone 1 |  |  |  |  |  |  |
| Clear Customer Clear Prospect Clear Customer Marketing Clear Contract Marketing ✓ 0K × Cancel                      |                                  |  |  |  |  |  |  |  |



### **Customer Screen Changes**

From the customer screen you are now able to go straight to that customer's 'Invoice Account' as well as their 'Customer Account', without the need of going to each of the areas separately and re searching.

Once the relevant screen is open it has the same functionality as the normal Accounts screen and Customer Account screen.

| 🗈 Customer Setup // JONES, INDIANA 🗙                 |                               |  |  |  |  |
|--|-------------------------------|--|--|--|--|
| Customer ID: 39 View Invoice Acc                     | count View Customer Account   |  |  |  |  |
| Personal Emergency/Health Issues Others Notes Status | Sales History                 |  |  |  |  |
| Personal Details                                     | Contact Details (default)     |  |  |  |  |
| Last Name: JONES                                     | Address:                      |  |  |  |  |
| First Name: INDIANA                                  | Suburb:                       |  |  |  |  |
| Title: MR 💌  | State: NSW Postcode:          |  |  |  |  |
| Gender   | Home Phone:                   |  |  |  |  |
| ● Male<br>○ Female                                   | Work Phone:                   |  |  |  |  |
| Date of Bith:  | Mobile Phone:                 |  |  |  |  |
|  | Home Fax:                     |  |  |  |  |
|  | Work Fax:                     |  |  |  |  |
| Loncession Date:                                     | E-mait                        |  |  |  |  |
| Partner Name:  |                               |  |  |  |  |
| Ref #::  |                               |  |  |  |  |
| Active Carrot Enabled 20/10/2015 4:33:19 PM          | Other >> Web Status >>        |  |  |  |  |
| No current cards Cards >>                            |                               |  |  |  |  |
|  |                               |  |  |  |  |
| Setup<br>Letter Issue card Marketing                 | Apply Save Delete Clear Clone |  |  |  |  |

## View Invoice Account

|  | C Accounts                      |   |   |  |  |  |
|--|---------------------------------|---|---|--|--|--|
| Customer Setup //. Customer ID: 39   | Account Id:<br>Customer:        | Debtor #:   |   |  |  |  |
| Personal Emergency/Health Issues Others Notes Status Sales Personal Details Last Name: JJONES First Name: INDIANA Title: MR Gender Male Date of Birth: D | ☐ Include Pa<br>Invoice No<br>7 | Finance Status: Account ACTIVE id Invoices           Start Date         End Date         Due Date         Total, \$         Due, \$           21 OCT 2015         NOT ISSUED         NOT ISSUED         130.00         130.00 |   |  |  |  |
| Age:   |                                 | Credit On Account: \$ 0.0<br>Account Balance: \$ 130.0  | 0 |  |  |  |
|  |                                 | IISSUE View Invoice Lreak Info IIssue Llose   |   |  |  |  |



## View Customer Account

|   | Customer Accounts  | _ <b>D</b> X                 |
|---|--|------------------------------|
| Customer Setup // JONES, INDIANA Customer ID: 33                        | Petson ID:         Implementation         2           INDIANA.JONES  |                              |
| Personal Details Last Name: JONES Fret Name: INDIGATA                   | Account Stated: 21/10/2015 Next Debit Amount :\$0.00 Account Closed  |                              |
| Title: MR State: NSW<br>Gender<br>Male                                  | Other Purchases DD         Cards         Account Lines         History           Date         Time         Description         Debit.         Credit.         Line Balance, 1           21/10/2015         12.33         Transaction POS Purchase         13.39         0.00 | Tranid Status                |
| Date of Birth:         D           Age:         Home Fax                | 2///u/2015 i.2.38 iTaniaction 50.00 30.01  | 160                          |
| Concession Date:  |  |                              |
| Active Carrot Enabled 20/10/2015 4.33.19 PM      Other >>      Cards >> |  |                              |
| Letter Issue card Marketing Apply Save Delete                           | Pendings: \$ 0.00 Total Debit: \$ 19.99 Total Credit: \$ 50.00 Total Balance: \$ 30.01 "Right mouse click list above will show Account Details for line selected   | Reallocate Accounts<br>Print |
|   | Diose  |                              |

## Search by Debtor ID, ABN and Blocked Accounts in the Client screen

When searching for a Client in any screen you now have the ability to search using the Debtor ID and ABN number. You can also include show Blocked Accounts.

| Ę | 5 Clients X  |                  |  |   |  |      |        | x           |          |  |  |
|---|--|------------------|--|---|--|------|--------|-------------|----------|--|--|
| Γ |  |                  |  |   |  |      |        |             |          |  |  |
|   | Company Group  | Client Id        | Debtor Id  | Name  | Contact                                | Role |        | Address     | ABN      | Finance Status   |  |
|   |  | 4<br>5<br>1<br>2 | 123456<br>987654                                     | DIVE CLUB<br>NSWIS<br>TEST SCHOOL<br>TEST SPORTS CL | JENNY BROWN<br>LISA<br>JON<br>N WESTON | 1106 |        | 9 NEWSOM ST | 00000000 | Account ACTIVE<br>Account ACTIVE<br>Account ACTIVE<br>Account ACTIVE |  |
|   | Company Gr<br>Client Id<br>Debtor Id<br>Name<br>Contact<br>Role<br>Address<br>CABN | oup              | Starting     Containing     Include Blocked Accounts |   | Se                                     | erch | Show A | ll          |          |  |  |



| 8   |                                    |   |   | Clients  |                |   |                  |   | x |
|---|------------------------------------|---|---|--|----------------|---|------------------|---|---|
| Company Group   | Client Id<br>4<br>5<br>1<br>2<br>3 | Debtor Id<br>123456<br>987654                         | Name<br>DIVE CLUB<br>NSWIS<br>TEST SCHOOL<br>TEST SPORTS CL<br>TRIATHLON CLUB | Contact<br>JENNY BROWN<br>LISA<br>JON<br>N WESTON<br>JENNY BROWN | Role           | Address<br>9 NEWSOM ST<br>9 NEWSOM STRE | ABN<br>000000000 | Finance Status<br>Account ACTIVE<br>Account ACTIVE<br>Account ACTIVE<br>Account ACTIVE<br>Account BLOCKED |   |
| Company<br>Client Id<br>Debtor Id<br>Name<br>Contact<br>Role<br>Address<br>CABN | Group                              | Starting     Containing      Include Blocked Accounts |   | <u>S</u> e   | ect <u>C</u> a | w ≙l                                    |                  |   |   |

#### Ability to add Clients ABN and Billing Address

From the Client Setup screen you now have the ability to add a Clients ABN number and billing address. With the billing address you can also use the button 'Same as Client Address' to copy the details.

| Client Setup                                  |  |  |  |  |  |
|---|--|--|--|--|--|
| Client Id: 1 View Account Allow Corporate Mer | mberships                              |  |  |  |  |
| General Contacts Manager Roles Comments       |  |  |  |  |  |
| Client Name                                   | ABN                                    |  |  |  |  |
| TEST SCHOOL                                   | 00000000 (3)                           |  |  |  |  |
|   |  |  |  |  |  |
|   | Billing Address Same as Client Address |  |  |  |  |
| Address: SNEWSUM ST                           | Address: 9 NEWSUM 51                   |  |  |  |  |
| Suburb: ASCOT VALE                            | Suburb: ASCOT VALE                     |  |  |  |  |
| State: NSW Postcode: 3032                     | State: NSW Postcode: 3032              |  |  |  |  |
|   |  |  |  |  |  |
| Other Details                                 |  |  |  |  |  |
|   |  |  |  |  |  |
| Default Status:                               |  |  |  |  |  |
|   |  |  |  |  |  |
|   |  |  |  |  |  |
|   |  |  |  |  |  |
| Marketing                                     | Save Delete Clear Close                |  |  |  |  |

If you require the additional Client Billing address to appear on the Client Invoice you will need to recreate the Invoice Template Models in Admin> POS > Invoicing> Template Models. Please refer to the Admin User Guide for assistance if required.

Once the additional mail merge fields have been created the Client Billing address will appear as a merge field that can then be added to the Client Invoice templates. This is done from Admin> POS> Invoicing> Templates. Please refer to the Admin User Guide for assistance if required.



Available Fields ClientBillingAddress ClientBillingAddress ClientBillingState ClientBillingSuburb ClientContactName ClientPostcode ClientPostcode {ClientName} {ClientAddress} {ClientSuburb}{ClientPostcode} {ClientBillingAddress} {ClientBillingSuburb} {ClientBillingState} ClientPostcode ClientState ClientSuburb ILineDescription ILineGST ILineMemVPHolderId {ClientBillingPostcode} **TAX INVOICE ILineMemVPHolderNam** Insert Invoice Number: #{InvoiceNumber} Invoice begins on: {InvoiceStartDate} Invoice ends on: {InvoiceEndDate} Due Date: {InvoiceDueDate} Dear {ClientContactName}, Please pay this invoice within 30 days.

Regards, Your friendly debt collector.

The Client billing address will also displays on the Booking Confirmation Letter. The merge field will need to be added to your Links Booking Confirmation template if required. This is done via Admin> Letters> Templates and selecting Facility Booking Confirmation. Please refer to the Admin User Guide for assistance if required.

x

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•

| 8  | 😂 Links Letter Templates 🗾 🗙   |  |   |  |  |  |  |
|--|--|--|---|--|--|--|--|
| Links Letter Data Sources *     Name     Customer     Bacility Booking Confirmation     Facility Booking Quote     Family     MemContract     Retention     StudentDetails | Templates available<br>Template Description<br>Facility_Booking_Confirmation | File location<br>C:\Links Modular Solutions\Links Templates\Facility_Booking_Confirmat | - |  |  |  |  |
| Data Source Description:   |  |  |   |  |  |  |  |
|  | Add Template Edit Te<br>Edit Description/Location Assign to Lin              | mplate Close   |   |  |  |  |  |



«ClientName» «CustomerFirstName» «CustomerLastName» «ClientAddress»

«ClientSuburb» «ClientState» «ClientPostCode»

«ClientBillingAddress» «ClientBillingSuburb» «ClientBillingState» «ClientPostCode»|

TAX INVOICE

Invoice Number: #«BookingID» Due Date: {InvoiceDueDate}

 $Dear\ «ClientName »\ «CustomerFirstName »\ «CustomerLastName »,$ 

Please pay this invoice within 30 days.

**Booking Charges** 

| Facility Booked | Date      | From      | To        | GST       | Charges        |
|-----------------|-----------|-----------|-----------|-----------|----------------|
| «FacilityName»  | «Facility | «Facility | «Facility | «Facility | «FacilityBooki |
|                 | BookingD  | BookingF  | BookingT  | BookingG  | ngCharge»      |
|                 | ate»      | romTime   | oTime»    | STAmou    |                |
|                 |           | »         |           | nt»       |                |

Total Bookings: «TotalBookingsAmount»

#### Primary Contact is now a Mandatory Field for Clients

When adding a Client the Primary Contact is now a Mandatory field.

| 0                      | Client Setup                       | x |
|------------------------|------------------------------------|---|
| Client Id: 1           | View Account Corporate Memberships |   |
| General Contacts Manag | yer Roles Comments                 |   |
| Primary Contact:       |                                    |   |
| PH:                    |                                    |   |
| MOB:                   |                                    |   |
| FAX:                   |                                    |   |
| EMAIL:                 |                                    |   |
| Accounts Contact:      |                                    |   |
| PH:                    |                                    |   |
| MOB:                   |                                    |   |
| FAX:                   |                                    |   |
| EMAIL:                 |                                    |   |
|                        |                                    |   |
|                        |                                    |   |
|                        |                                    |   |
|                        | Arketing                           |   |



## **Multiple Client Contacts**

You can now add multiple Client Contacts to the one Client.

| ۵,   | Facility Booking 75   | x                      |
|--|---|------------------------|
| Ex   | Date Booked:     Wed 21/10/2015     Booking ID 75     Ref # 115 to 148 inclusive       Rescription     Booking Details     Multiple Bookings       C Casual Use     Booking Name:     Basketball Training       Client Setup     X            | Þ                      |
|  | Client Id: 2 View Account Allow Corporate Memberships General Contacts Manager Roles Comments Primary Contact ID: 2   | -                      |
| L Contraction of the second se | N WESTON<br>PH:<br>MOB:<br>FAX:<br>EMAIL: support@linksmodularsolut<br>Send Email Edit<br>Other Contacts<br>Id Active Name<br>Fax:<br>Email:<br>Phone:<br>Fax:<br>Email:<br>Primay Contact<br>Fax:<br>Email:<br>Primay Contact<br>Save Cancel | ↓<br>,<br>riod<br>down |
|  | Marketing   |                        |
|  | Documents         Letter         Email         Booking<br>Access         Change<br>Log         Payment Schedule         Update and Pay         Apply Changes         Update         Close   |                        |



#### **Client Marketing Information**

There is now the ability to collect and store Client Marketing Details. A 'Marketing' button has been added to the Client screen. These fields can be set as mandatory in Admin> Site> Mandotory Fields.

| Client Setup  |  | x  |
|---|--|----|
| Client Id: 1 View Account Callow Corporate Memberships                    |  |    |
| General Contacts Manager Roles Comments                                   |  |    |
| Client Name   | ABN                                    |    |
| (TEST SCHOOL  | 00000000 🔞                             |    |
|   | Billing Address Same as Client Address |    |
| Address: 9 NEWSOM ST Address:   | 9 NEWSOM ST                            |    |
| Suburb: ASCOT VALE Suburb:  | ASCOT VALE                             |    |
| State: NSW Postcode: 3032 State:  | NSW Postcode: 3032                     |    |
| Other Details<br>Company Group Clear<br>Default Status: Configure _ Clear |  |    |
| Marketing   | Save Delete Clear Clone Clo            | se |

Select the 'Marketing' button to open the Client Marketing Details screen. This screen contains the below tabs to store data relevant to the Client as shown below.

#### Marketing

| S Client Marketing I              | Details // Client ID - 1      |
|-----------------------------------|-------------------------------|
| Client Id: 1 Name: TEST SCHOOL    |                               |
| Marketing Company Extras Tracking |                               |
|                                   |                               |
| First Contact                     | Veb O Other @ None            |
|                                   |                               |
| Source:                           | Clear                         |
| -                                 |                               |
| Type: Walk In                     | Llear                         |
| Promotion:                        | Clear                         |
| Industry:                         | Clear                         |
| 1                                 |                               |
|                                   |                               |
|                                   |                               |
|                                   |                               |
|                                   |                               |
|                                   |                               |
|                                   | 🕮 🗍 🔵 🍾 📗                     |
|                                   | Save Delete Clear Clone Close |



## Company

| 8                                   | Client Marketing Details // Client ID - 1 | _ <b>D</b> X      |
|-------------------------------------|---|-------------------|
| Client Id: 1 Name                   | TEST SCHOOL                               |                   |
| Marketing Company Extras Tracking   |   |                   |
| Markeing company   Exites   Hooking |   | 1                 |
| Company                             |   | - I               |
| Date Of Formation: 1 JUL 2015       | _ D                                       |                   |
| Corporate Group: Test School        | Clear                                     |                   |
| J                                   |   |                   |
| Annual Revenue Range —              | No. of Employees                          |                   |
| Unknown                             | O Unknown                                 |                   |
| C 75K or less                       | C None                                    |                   |
| C 76K to 200K                       | C 1 to 9                                  |                   |
| C 201K to 500K                      | C 10 to 49                                |                   |
| C 501K to 1M                        | C 50 to 249                               |                   |
| C above 1M to 5M                    | C 250 or more                             |                   |
| C above 5M to 10M                   |   |                   |
| C above 10M                         |   |                   |
|                                     |   |                   |
|                                     |   |                   |
|                                     |   |                   |
|                                     |   |                   |
|                                     |   |                   |
|                                     |   |                   |
|                                     | <b>3</b>                                  |                   |
|                                     | Save Delete                               | Clear Clone Close |
|                                     |   |                   |

## Extras

| 8                 | Client Marketing Details // Client ID - 1 | _ <b>D</b> X     |
|-------------------|---|------------------|
| Client Id: 1      | Name: TEST SCHOOL                         |                  |
| Marketing Company | Extras] Tracking                          | 1                |
|                   |   |                  |
| Extra Field 1:    | Clear                                     |                  |
| Extra Field 2:    | Clear                                     |                  |
| Extra Field 3:    | Clear                                     |                  |
| Extra Field 4:    | Clear                                     |                  |
|                   | Date Marketing Info<br>First Entered:     |                  |
|                   |   |                  |
|                   |   |                  |
|                   |   |                  |
|                   | Save Delete                               | ★<br>Clone Close |



## Tracking

For more information on Tracking please see the Facility Enquires part of this document.

| 8                                 | Client Marketing Details / | // Client ID - 1 | _ <b>_</b> X |
|-----------------------------------|----------------------------|------------------|--------------|
| Client Id: 1 Name                 | TEST SCHOOL                |                  |              |
| Marketing Company Extras Tracking | ]                          |                  |              |
| View Tracking                     |                            |                  |              |
|                                   |                            |                  |              |
|                                   |                            | Save             | Clone Close  |



## **Account Block option**

There is now an option to Block Accounts from invoicing. When this option is selected, no new transactions can be added to the account. This stops users from creating new facility bookings. Staff that are Administrators can change the status of blocking and unblocking accounts.

| 8                         | Accounts   |
|---------------------------|--|
| Account Id:<br>Client:    | Image: Debtor #:         123456           TEST SCHOOL  |
| 🗌 Include P               | JDN<br>Finance Status: Account ACTIVE<br>Block Account   |
| Invoice No<br>6<br>2<br>4 | Start Date         End Date         Due Date         Total, \$         Due, \$           19 OCT 2015         NOT ISSUED         NOT ISSUED         2,000.00         2,000.00           19 OCT 2015         19 OCT 2015         19 OCT 2015         -100.00         -2,100           9 SEP 2015         NOT ISSUED         NOT ISSUED         175.00         120.00 |
|                           | Credit On Account: \$ 0.00<br>Account Balance: \$ 20.00  |
| U                         | nissue View Invoice Credit Info Issue Close  |

If a user tries to add a transaction to a blocked account, they will receive the following message.

| pos.link - [Point of Sale]  |                              |                               |                     |   |                |                                  |
|-----------------------------|------------------------------|-------------------------------|---------------------|---|----------------|----------------------------------|
| 🖏 File Till Facility Mainta | in Customers Retention Appoi | ntments consult.link Messages | 6 Help              |   |                |                                  |
| Current Transaction         |                              | Previous                      | Transaction         |   |                | Previous Visits                  |
|                             |                              | Total \$6.09                  | Change \$           |   | Viev           | No visits today                  |
| Description                 |                              |                               | Quantity            |   | Amount \$      | _                                |
| Casual Adult Swim           |                              |                               | 50                  |   | 300.00         |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
| I                           |                              |                               |                     |   | Total \$300.00 |                                  |
|                             |                              |                               |                     |   | TOTAI \$500.00 |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               | Swim School         |   |                | Casual Health Club               |
| Full Access Direct          | Aquatic Visit Passes         | Bookings                      | Bookings            | 1 | Merchandise    | (\$20.00)                        |
| Debit                       |                              |                               | -                   |   |                |                                  |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   | Ac             | count Blocked                    |
| Full Access Adult 12        |                              |                               |                     |   |                |                                  |
| Months                      | Gym Visit Passes             | Booking Attendence            | Swim School Payment |   | A This Account | is Placked due to Einance Status |
|                             |                              |                               |                     |   |                | is blocked due to rmance status. |
|                             |                              |                               |                     |   |                |                                  |
|                             |                              |                               |                     |   |                | ОК                               |
|                             |                              |                               |                     |   |                |                                  |



If a user tries to make a facility booking for a blocked account, they will receive the following message.

| 8  | Facility Bool  | king  | x   |
|--|--|---|---|
| Date Booked: Wed   | 21/10/2015 Booking ID  | Ref #   |   |
| C Casual Use Booking N<br>C Casual Use Booking N<br>C Customer Client<br>Details | ame:newViewContact:  | <b>_</b>  | C End Date:   |
| Enquiry<br>Details<br>C Tentative<br>Prime                                       | thod:  Invoice Account C Cash On Anival uctions: 0/255 Usage:  | Status:  PO Number: PO Permanent Booking  | Booking Type:   |
| Facility Name Date   | Day From Time To Time Attended Pax<br>We 09:00 AM 10:00 AM 0   | Duration (hrs) No. Periods \$Per Period 1.00 4 25.00                                  | Charge (\$) Service Name  |
| Total owing on this booking line is \$100.00                                     | Point of S<br>TEST SCHOOL is not allowed to book due t<br>BLOCKED  | ale X<br>to Finance Status: 1 - Account<br>OK ar Hor                                  | Delete<br>Booking Line Edit<br>Booking Line Booking Peak Period<br>Setup/Packdown<br>at Charge (\$) |
| Credit Assets Staff Credit Amount Remai  | * - Price was<br>overridden Add Service Add Produc Tran ID Payment Date Amount, \$      Booking Change - | et Edit Product/Service Selected Bo<br>Group Booking Tota<br>Total Pak<br>Dutstanding | oking Total \$: 100.00<br>t \$ 100.00<br>± \$ 0.00<br>g: \$ 100.00                                  |
| Documents Letter Email   | Access Log Payment S   | Schedule >> Book It and Pay Apply Cha   | nges Book It Close  |

### Ability to PDF Account Invoices

To add There are two new invoice templates

- Client Facility Booking Invoice
- Customer Facility Booking Invoice

One of these must be selected as the template when issuing an invoice so that is opens as a PDF document.

Additional Merge Fields are available for invoice templates:

- Booking Name
- Booking ID
- PO Number
- Total Pax

The merge fields need to be added via Links Support.



1. To edit the templates go to Admin> POS> Invoicing> Templates and select Add New Template.

| 8   | Template Setup  |
|---|---|
| Path for Invoice Word templates:  | C:\Links Modular Solutions\Links Templates                          |
| Default Templates<br>Customer<br>Name: CUSTOMER INVOIO<br>Filename: LINKS_CUSTOMER    | CE  |
| Customer (With Facility Booki<br>Name: CUSTOMER FACILI<br>Filename: LINKS_CUSTOMER    | ng Details)<br>TY BOOKING INVOICE<br>}_FACILITY_BOOKING_INVOICE.DOT |
| Client<br>Name: CLIENT INVOICE<br>Filename: LINKS_CLIENT_INV                          | /OICE.DOT   |
| Client (With Facility Booking I<br>Name: CLIENT INVOICE<br>Filename: LINKS_CLIENT_INV | Details)<br>IOICE.DOT   |
| Select to Add / Edit Templat     Add New Template (.dot)                              | C Edit Existing Template (.dot open in MS WORD)                     |
| Select Template Model:  | ▼ WORD  |
| Ad  | d New Template  |
|   |   |
|   |   |
|   |   |
|   | Save Delete Clear Clone   |

- 2. Select the template model as 'Client Facility Booking Invoice'
- 3. Select Add New Template.
- 4. Enter the New Template Name
- 5. Select the Tick Box to 'Use Links Default Template'
- 6. Select Ok

| 🖎 Add Invoid                 | e Template Model Type: Client Facility Booking Invoice                             |
|------------------------------|--|
| Add Invoice Template -       |  |
| All Invoice Templates must H | nave a unique name. Templates will be saved in the Default Links Templates Folder. |
| You can: ★ Use Links         | Default Template to create a new Invoice Template                                  |
| ★ Browse for                 | an existing MS Word Template (.dot file)   |
| Enter New Template Name:     | CLIENT FACILITY BOOKING INVOICE  |
| Enter the New Invoice Temp   | plate Filename to be created (format: xxxx.dot):                                   |
| New File Name:               | LINKS_CLIENT_FACILITY_BOOKING_INVOICE.DOT  |
|                              | Use Links Default Template   |
| OR                           |  |
| Type or Browse for Existing  | nvoice Template File name (.dot):  |
| Existing File Name:          |  |
|                              | ✓ OK X Cancel  |



| {ClientAddress}  |   |          |   |  |
|--|---|----------|---|--|
| {ClientSuburb} {ClientPostcode}  | Available Fields  | x        |   |  |
| {ClientBillingAddress}<br>{ClientBillingSuburb} {ClientBillingState} {C  | ILineQuantity<br>ILineTotal<br>ILineTranDate  | <b>_</b> | [ |  |
| TAX INVOICE  | InvoiceBalanceDue<br>InvoiceDueDate<br>InvoiceEndDate<br>InvoiceGST<br>InvoiceSumber<br>InvoicePaid<br>InvoiceStartDate |          |   |  |
| Invoice begins on: {InvoiceStartDate}<br>Invoice ends on: {InvoiceEndDate}   | INVOICE   OTAI<br>ISectionBookingId<br>ISectionBookingName  | _        |   |  |
| Due Date: {InvoiceDueDate}   | ISectionPurchaseOrderNumber   | -        |   |  |
| Dear {ClientContactName},  |   | Insert   |   |  |
| Regards,<br>Your friendly debt collector.  |   |          |   |  |
| <u>DATE</u> <u>PRODUCT</u><br>{ILineTra {ILineDescription}<br>nDate} {ILineMemVPHolderName}<br>{ILineMemVPHolderId}        | QTY <u>TOTAL</u> <u>GST</u><br>{IL.ineQu {IL.ineTot {IL.ineG<br>antity} al} ST}   |          |   |  |
| <br>Booking Id: {ISectionBookingId}<br>Booking Name: {ISectionBookingName}<br>Purchase Order Number: {ISectionPurchaseOrde | rNumber}  |          |   |  |
| DATE PRODUCT<br>{ILineTra {ILineDescription}   | <u>QTY TOTAL GST</u><br>{ILineQu {ILineTot {ILineG  |          |   |  |
| nDate}   | antity} al} ST}   |          |   |  |
| TOTAL: {InvoiceTotal}<br>GST: {InvoiceGST}<br>PAID: {InvoicePaid}<br>BALANCE DUE:<br>{InvoiceBalanceDue}                   |   |          |   |  |

When issuing the Invoice it will open as a PDF.



| 8  | Issue Invoice   | - 🗆 X  |
|--|---|--|
| Path for Invoice Word templates:   | C:\Links Modular Solutions\Links Templates  |  |
| Select Invoice Template:   | CLIENT FACILITY BOOKING INVOICE   | PDF  |
| Due Date:  | D End of Month Due In:  |  |
| Client Contact:  | JON   |  |
| Filters<br>Start Date: 9 SEP 2015<br>End Date: 19 OCT 2015   | D Booking: ALL  | yly  |
| Date         Trans Id         Product           ☑ 9 SEP 135         S1006           ☑ 19 OCT 156         S1007 | Description         Booking Id         Qty         Total. \$         C           Courts Hire: Court 1 Sep 9 2015 08:         56         4         55.00           Pool Hire: 50M POOL Oct 19 2015 0         69         8         2,000.00 | redit, \$  |
| V     Select All       Credit to Assign     Date       Date     Booking Id       Totals:                       | Due,       Pay.         Due,       Pay.         Total Selected:       \$ 00         Payments Made:       \$ 00         Balance Due:       \$ 20         GST Amount:       \$ 18         Amount       \$ 12                                | 55.00<br>10<br>55.00<br>6.82<br>155.00<br>16.82<br>16.82 |
| Prad0ADEC.pdf - Adobe Acrobat Reader<br>File Edit View Window Help   | r DC  | Cancel   |
| Home Tools Document  |   | Export PI  |

|   | TAX   | INVOICE   |                 |                         |                      | -        | Export PDF  | Â           |
|---|---|---|-----------------|-------------------------|----------------------|----------|---|-------------|
|   | Invoice Na<br>Invoice be<br>Invoice en<br>Due Date: | umber: #2373<br>gins on: 10 Dec 2013<br>ds on: 01 Apr 2014<br>30 Sep 2015                       |                 |                         |                      |          | Adobe Export PDF<br>Convert PDF Files to Wor<br>or Excel Online | d           |
|   | Dear DEM<br>Please pay                              | IO CONTACT,<br>7 this invoice within 30 days.   |                 |                         |                      |          | Select PDF File   | ×           |
|   | Regards,<br>Your frier                              | adly debt collector.  |                 |                         |                      |          | Convert to<br>Microsoft Word (*.docs                            | 0 -         |
| • |   |   |                 |                         |                      | •        | Document Language:  |             |
|   | Booking I<br>Booking N<br>Purchase                  | d: 9064<br>vame:<br>Order Number:   |                 |                         |                      |          | English (U.S.) Change   |             |
|   | <u>DATE</u><br>10 Dec<br>2013                       | <u>PRODUCT</u><br>MSAC: RESERVED<br>CARPARKS Dec 10 2013<br>04:45 to 05:15 PAX: 1               | <u>QTY</u><br>2 | <u>TOTAL</u><br>\$30.00 | <u>GST</u><br>\$2.73 |          | Convert   |             |
|   | Booking I<br>Booking N                              | d: 9066<br>Vame:  |                 |                         |                      |          | 📍 Create PDF  | ~ -         |
|   | Purchase<br><u>DATE</u><br>10 Dec<br>2013           | Order Number:<br><u>PRODUCT</u><br>Personal Training: Lisa Jan<br>10 2014 11:00 to 12:00 PAX: 1 | <u>QTY</u><br>2 | <u>TOTAL</u><br>\$50.00 | <u>GST</u><br>\$4.55 | -        | Store and share files<br>Document Clour<br>Leam More            | in the<br>d |
|   |   |   |                 |                         |                      | <u> </u> |   |             |

Sign In



#### Due Date Options on Invoices

There is now an option to select 'End of Month' or the 'Due in' which will set the due date as applicable.

To default to the end of the month click the 'End of Month' Button.

| 5                                | Issue Invoice                              | _ 🗆 X  |
|----------------------------------|--|--------|
| Invoice Details                  |  |        |
| Path for Invoice Word templates: | C:\Links Modular Solutions\Links Templates |        |
| Select Invoice Template:         | CLIENT INVOICE                             | ▼ WORD |
| Due Date:                        | 31 OCT 2015 D End of Month Due In:         | •      |
| Client Contact:                  | JON  | -      |

To default to due in a certain amount of days from the current date, select the number of days from the 'Due in' drop down box.

| 8                                | Issue Invoice                              |   | _ <b>D</b> X |
|----------------------------------|--|---|--------------|
| Path for Invoice Word templates: | C:\Links Modular Solutions\Links Templates |   |              |
| Select Invoice Template:         | CLIENT INVOICE                             | - | WORD         |
| Due Date:                        | D End of Month Due In:                     | • |              |
| Client Contact:                  | JON 60 Days<br>90 Days                     |   |              |

30, 60 and 90 days are already entered. If you wish to enter more options, you can do this in Table Maintenance - 'Invoice Days Due'. Table Maintenance is accessed from Admin> Site> Table Maintenance.

| 8                     | Table Maintenance | X             |
|-----------------------|-------------------|---------------|
| Subject:              | CE DAYS DUE       |               |
|                       |                   | ← Edit        |
| - Values              |                   |               |
| Description           | Comments          | Status*       |
| 30 Days               | 30                | Active        |
| 60 Days               | 60                | Active        |
|                       | 30                |               |
| Add New Value         |                   | Add New Value |
| Description\<br>Code: |                   |               |
| Details:              |                   | Apply         |
| Status: Active        | •                 | Clear         |
|                       |                   | Close         |



## Ability to have all Invoice Lines unticked as a default

When issuing an invoice, there is now the option to have the lines unselected as a default.

| 8  | Issue Invoice  | _ 🗆 X  |
|--|--|--|
| Path for Invoice Details<br>Path for Invoice Word templates:<br>Select Invoice Template:<br>Due Date:<br>Client Contact:         | C:\Links Modular Solutions\Links Templates CLIENT INVOICE D End of Month N WESTON          | Uue In:  |
| Filters<br>Start Date: 9 SEP 2015<br>End Date: 21 OCT 2015   | D<br>D Booking: ALL  |  |
| Date         Trans Id         Product           ♥ 9 SEP         136         \$1006           ♥ 20 OCT         161         \$1006 | Description<br>Courts Hire: Court 1 Sep 9 2015 10:<br>Courts Hire: Court 1 Oct 20 2015 06: | Booking Id         Qty         Total, \$         Credit, \$           57         4         55.00           75         8         110.00 |
|  |  |  |
| 🔽 Select All   |  | Selected Lines   |

To set this default, go to Admin> POS> Setup.

| <b>B</b> , |   | Setup Point of Sale                      | x |
|------------|---|--|---|
| Ge         | neral Products Categories Payment Options     | Receipts   Laybys   Vouchers             |   |
|            | Point of Sale Options                         |  |   |
|            | Record cheque details                         | Return\Refund is not permitted.          |   |
|            | 🕱 Record credit card details                  | Prompt for amount on sale of \$0 product |   |
|            | 🕱 Card type only required                     | Visit pass free for sessions             |   |
|            | Validate credit card numbers                  | Check for overdue facility bookings      |   |
|            | 🕱 Ask for cash tendered                       | Include voucher total in balance         |   |
|            | 🔲 Layby / Split defaults full amount in layby | Allow users to change till ids           |   |
|            | Show product code on POS                      | All invoice lines unchecked by default   |   |
|            | 🕱 Always ask for discount reason              |  |   |
|            |   |  |   |


# Ability to issue Invoices by Location and Booking ID

On multi location databases, you can now filter charges by location and booking ID using the drop downs.

### By Location

| <b>D</b>  | Issue Invoice   | _ <b>_</b> × |
|---|---|--------------|
| Path for Invoice Word templates<br>Select Invoice Templates | C:\Links Modular Solutions\Links Templates CLIENT INVOICE | ▼ WORD       |
| Due Date:<br>Client Contact:                                | D End of Month Due In:     TEST CLIENT                    | •            |
| Filters<br>Start Date: 21 OCT 2015<br>End Date: 21 OCT 2015 | D Location: Loc1 ▼<br>D Booking: ALL<br>Loc1<br>LOC2      |              |

| Filters<br>Start Dat<br>End Dat | e: 21 0C<br>e: 21 0C | T 2015 D<br>T 2015 D | Location: Loc1<br>Booking: ALL       |            | •   |                          |
|---------------------------------|----------------------|----------------------|--------------------------------------|------------|-----|--------------------------|
| Date                            | Trans Id             | Product              | Description                          | Booking Id | Qty | Total, \$ Credit, \$ 🔥 🔨 |
| 🗹 21 OCT                        | 229                  | S1006                | Courts Hire: Court 1 Oct 23 2015 06: | 79         | 7   | 105.00                   |
| 🗹 21 OCT                        | 229                  | S1006                | Courts Hire: Court 1 Oct 22 2015 06: | 79         | 7   | 105.00                   |
| 🗹 21 OCT                        | 229                  | S1006                | Courts Hire: Court 1 Oct 21 2015 06: | 79         | 7   | 105.00                   |
| 🗹 21 OCT                        | 230                  | S1006                | Courts Hire: Court 1 Nov 18 2015 12: | 80         | 4   | 60.00                    |
| 🗹 21 OCT                        | 230                  | S1006                | Courts Hire: Court 1 Nov 11 2015 12: | 80         | 4   | 60.00                    |
| 🗹 21 OCT                        | 230                  | S1006                | Courts Hire: Court 1 Nov 4 2015 12:  | 80         | 4   | 60.00                    |
| 🗹 21 OCT                        | 230                  | S1006                | Courts Hire: Court 1 Oct 28 2015 12: | 80         | 4   | 60.00                    |
| 🗹 21 OCT                        | 230                  | S1006                | Courts Hire: Court 1 Oct 21 2015 12: | 80         | 4   | 60.00                    |
| 🗌 21 OCT                        | 231                  | P1008                | Diet Coke 600ml:                     |            | 5   | 24.00 🗸                  |

# By Booking ID

| 8   | Issue Invoice   | _ 🗆 X                       |
|---|---|-----------------------------|
| Path for Invoice Word templates:<br>Select Invoice Template:                              | C:\Links Modular Solutions\Links Templates CLIENT INVOICE                                   | WORD                        |
| Due Date:   | D End of Month Due In:  | -                           |
| Client Contact:   | TEST CLIENT   | -                           |
| Filters           Start Date:         21 OCT 2015           End Date:         21 OCT 2015 | D Location: Loc1  D Booking: ALL  | Apply                       |
| Date Trans Id Product   | PLL           Description         79           80         Courts Hire: Coor - oc 23 2013 06 | al, \$ Credit, \$ ^<br>6.00 |



| Filters<br>Start Date: 21 00<br>End Date: 21 00 | T 2015 D<br>T 2015 D | Location: ALL<br>Booking: 79         |            | •   |                      |   |
|---|----------------------|--------------------------------------|------------|-----|----------------------|---|
| Date Trans Id                                   | Product              | Description                          | Booking Id | Qty | Total, \$ Credit, \$ |   |
| ☑ 21 OCT 229                                    | S1006                | Courts Hire: Court 1 Oct 25 2015 06: | 79         | 7   | 105.00               |   |
| ☑ 21 OCT 229                                    | S1006                | Courts Hire: Court 1 Oct 24 2015 06: | 79         | 7   | 105.00               |   |
| ☑ 21 OCT 229                                    | S1006                | Courts Hire: Court 1 Oct 23 2015 06: | 79         | 7   | 105.00               |   |
| ✓ 21 OCT 229                                    | S1006                | Courts Hire: Court 1 Oct 22 2015 06: | 79         | 7   | 105.00               | ≡ |
| ✓ 21 OCT 229                                    | S1006                | Courts Hire: Court 1 Oct 21 2015 06: | 79         | 7   | 105.00               |   |
| 21 OCT 230                                      | S1006                | Courts Hire: Court 1 Nov 18 2015 12: | 80         | 4   | 60.00                |   |
| 21 OCT 230                                      | S1006                | Courts Hire: Court 1 Nov 11 2015 12: | 80         | 4   | 60.00                |   |
| 21 OCT 230                                      | S1006                | Courts Hire: Court 1 Nov 4 2015 12:  | 80         | 4   | 60.00                |   |
| 21 OCT 230                                      | S1006                | Courts Hire: Court 1 Oct 28 2015 12: | 80         | 4   | 60.00                | ~ |

### Ability to Issue Negative Invoices

You can now issue an invoice as a 'Credit Note' as a reference for the Client/Customer.

- 1. From the POS module type in the negative amount i.e. -100 $\$
- 2. Click on the [...] to select the relevant service code for this credit to be applied from

| Current Transaction | Previous Tra   | nsaction  |                 |
|---------------------|----------------|-----------|-----------------|
|                     | <br>Total \$-7 | Change \$ | View            |
| Description         |                | Quantity  | Amount \$       |
| Facility Hire       |                | 1         | -100.00         |
|                     |                |           |                 |
|                     |                |           |                 |
|                     |                |           |                 |
|                     |                |           |                 |
|                     |                |           |                 |
|                     |                |           |                 |
| 1                   |                |           | Total \$-100.00 |
|                     |                |           | 100010-100.00   |

3. Click the Account button to apply the credit payment to the Customer/Client Account.

| Current Transaction            |                      | Previous           | Transaction<br>Change \$ | View                 | Previous Visits<br>No visits today | Visits Today           |             |          |             |
|--------------------------------|----------------------|--------------------|--------------------------|----------------------|------------------------------------|------------------------|-------------|----------|-------------|
| Description<br>Facility Hire   |                      |                    | Quantity  <br>1          | Amount \$ [          |                                    | Picture+               | Cash        | Voucher/ | Credit Note |
|                                |                      |                    |                          |                      |                                    |                        | Cheque      | Acc      | ount        |
|                                |                      |                    |                          | Total \$-100.00      |                                    | ~                      |             |          |             |
| Full Access Direct             | Aquatic Visit Passes | Bookings           | Swim School<br>Bookings  | Ca<br>5 Select ar    | n Account                          | Adult Swim<br>(\$6.00) | Credit Card | Layb     | y/ Split    |
| Bobit                          |                      |                    |                          | Select Account, Olie | nt or Customer                     |                        |             |          |             |
|                                |                      |                    |                          | Account:             |                                    |                        | EFTPOS      | Custome  | r Account   |
| Full Access Adult 12<br>Months | Gym Visit Passes     | Booking Attendence | Swim School Payment      | Client:              | Search                             | hild Swim<br>(\$4.00)  |             |          |             |
|                                |                      |                    |                          | Customer:            | Search                             |                        |             |          |             |
| Pool 20 Visit - Adult          | Group Fitness        | Booking Payment    | Student Search           | E                    | ixit                               | der 2 Swim<br>(\$0.00) | 7           | 8        | 9           |
|                                |                      |                    |                          |                      |                                    |                        |             |          |             |

4. This can be viewed on the Clients Account



| 8                              | Acco  | ounts                                 |  | x |
|--------------------------------|---|---------------------------------------|--|---|
| Account Id:<br>Client:         | TEST SCHOOL   | Debtor #: 123456                      |  |   |
|                                | JUN   | Finance Status:                       | Account ACTIVE                                   | 1 |
| I Include P<br>Invoice No<br>2 | ad Invoices<br>Start Date End Dr<br>19 OCT 2015 NOT ISSUE | ite Due Date  <br>D NOT ISSUED        | Total.\$ Due, \$                                 |   |
|                                | nissue View Invoice Ci                                    | Credit On A<br>Account f<br>edit Info | Account: \$ 0.00<br>Balance: \$ 0.00<br>ie Close |   |

5. Select Issue.

You can create a different template for this purpose and label it 'Credit note'. Please see above on setting up a new Invoice Template or the Admin User Guide for assistance.

| 0   | Issue Invoice  | _ <b>D</b> X   |
|---|--|--|
| Path for Invoice Details<br>Path for Invoice Word templates:<br>Select Invoice Template:<br>Due Date:<br>Client Contact:          | C:\Links Modular Solutions\Links Templates CLIENT CREDIT NDTE  19 OCT 2015 D End of Month Due In: JON  | WORD   |
| Filters           Start Date:         19 OCT 2015           End Date:         19 OCT 2015   | D<br>D Booking: ALL  |  |
| Date         Trans Id         Product           □ 19 OCT         156         \$1007           ☑ 19 OCT         159         \$1005 | Description         Booking Id         Qty         Total, 2           Pool Hire: 50M PDOL Oct 19 2015 0         69         8         2,000.01           Facility Hire:         1         -100.01 | \$ Credit, \$ 0.00   |
| ✓ Select All  | Due,     Pay,       Due,     Pay,       Credit: 1     2       Balance Due: 1     3   | 100.00       0.00       2000.00       2100.00       2100.00       3.09 |
| Payments Made Date Booking Id 19 OCT 2015 0   | All Lines<br>Grand Total:<br>2000.00<br>V OK   | \$ 1900.00<br>\$ 172.73<br>X Cancel                                    |



6. When you Select 'OK' a Pop up Screen will appear indicating that this invoice will be issued as a Credit Note.

|   | Issue Invoice Credit   | ĸ |
|---|--|---|
| j | This invoice will be issued as a Credit Note.<br>After issuing this invoice, unissue to allow the credit to be used for<br>subsequent invoice charges. |   |
|   | OK Cancel  |   |

TEST SCHOOL

# **CREDIT NOTE**

Invoice Number: #2 Invoice begins on: 19 Oct 2015 Invoice ends on: 19 Oct 2015 Due Date: 19 Oct 2015

Dear JON, Please pay this invoice within 30 days.

| <u>DATE</u><br>19 Oct<br>2015 | <u>PRODUCT</u><br>Facility Hire: | <u>QTY</u><br>1 | <u>TOTAL</u><br>-\$100.00         | <u>GST</u><br>-\$9.09 |
|-------------------------------|----------------------------------|-----------------|-----------------------------------|-----------------------|
|                               |                                  | TOT             | □<br>AL: -\$100.00<br>ST: -\$9.09 |                       |

PAID: \$2000.00 BALANCE DUE: -\$2100.00



### Barcodes across Remote Desktop for Access Barcodes

You can now print Access Barcodes if you are using a Remote Desktop connection and have the New Access module.

To turn this feature on, go to Admin> Site> New Access Parameters and select 'Access for Casual Sales' (Barcodes)

| 5 |                                    | N |
|---|------------------------------------|---|
|   |                                    |   |
|   | 🕱 New Access Module                |   |
|   | Access for Casual Sales (Barcodes) |   |
|   | Access for Customer Cards (RFID)   |   |
|   | Service Entry at Turnstile         |   |

For the service to print a barcode it must have the activity assigned for that Access Point. This is done in Admin> Products/Services> Services (Services> Service Master for Multi Location).

| <b>B</b> ,                       | Service Setup   | x       |
|----------------------------------|---|---------|
| Service<br>Code:<br>Description: | S1003          Next Code         Set Status         14           Casual Health Club         ACTIVE         ACTIVE |         |
| Pricing   Rep                    | Activities Available Activities Code Description GYM Select Activities Setup Activities Setup Activities          |         |
|                                  | Save Delete Clear Clone Close   | ]<br>se |

Your printer must also be setup with the below settings for LinksPrint Port (or modified to suit your printer/environment)



| ta Till Setup                                    | x     |
|--|-------|
| General Printer/Cash Drawer Appearance PC-EFTPOS |       |
| Cash Drawer Connected<br>Printer Driver Name:    |       |
| POS Display Post                                 |       |
| Comm port attached to:                           |       |
|  |       |
| ✓ OK × C   | ancel |

Please contact Links Support to ensure that your printer is compatible and to have the virtual port driver installed. Please note that Support will need remote access to the PC that will be printing the barcodes.

Now when you sell the Service at POS it will print the receipt with a barcode at the bottom for a single entry.



### Visits Dashboard

There is now a Visits Dashboard. This allows you to have a live feed of Visits from set access points in the centre/s. This can display the following:

- Members
- Visit Pass holders
- Services
- Students
- Pax from Facility bookings

To set this up, go to Admin> Site> Other Site Parameters or Setup Locations> Visits Dashboard Tab.

To setup a Tally Type

- 1. Press the 'New' button
- 2. Create a Tally Name in the 'Tally Type' field
- 3. Select 'Save'

| 8                                    |  |           | Setup Locations   |                          |
|--------------------------------------|--|-----------|-------------------|--------------------------|
| Location:<br>Description:<br>Details | Loc1<br>Location 1<br>Stock Stores Tills | Templates | Appoint's / Cards | Memberships Vis          |
| Access Points                        | ClassWeb Active Carrot                   | Security  | SMS               | Facility <b>/isits D</b> |
| Tally Typ                            | e:                                       | •         | New               | Delete                   |

| 8   | Other Site Parameters   |
|---|---|
| Details Stock Stores Tills<br>Access Points ClassWeb Active Carrot                | Templates         Appoint's / Cards         Memberships         Visit Passes         Class Types         Sessions           Security         SMS         Facility <b>fisits Dashboard</b> |
| Tally Type: Total Centre Attendence   | Save Cancel Options   |
| Services, Memberships and Visit Pass Types  Product Code Description              | Class Types Attendance Facilities Pax           Description         ExtraDescription  |
| Add Types Clear All Tally Service Sales, not Entries  Access Points  Access Point | Add Class Types     Clear All       Drop off Attendance after Class End Time       Access Points       Access Point         Tally Type  |
|   |   |



Add the Memberships, Visit Passes, Services and Class Types to include in the tally as applicable.

| 5  | Other Site Parameters   |                    |
|--|---|--------------------|
| Details Stock Stores Tills<br>Access Points ClassWeb Active Carrot   | Templates Appoint's / Cards Memberships Visit Passes Class Types Sessions<br>Security SMS Facility <b>Fisits Dashboard</b>  |                    |
| Tally Type: Members Visits   | New Delete     Options     T Show Hourly Tally  |                    |
| Services, Memberships and Visit Pass Types   | Search  | ×                  |
| M1000 Full Access Adult 12 Months<br>M1001 Full Access Direct Debit  | Code         Description         Amount, \$         AllPrice, \$         On Hand         Qty Per Pack         Packs On Hand         Type         ^           M1000         Full Access Adult 12 Months         2,000,00         1         M <td>Цр</td> | Цр                 |
| M1002 Aquatic 12 Months<br>M1003 Aquatic Direct Debit<br>M1004 Personal Training 60min Week<br>M1005 Personal Training 2 (Pitoin W | M1002         Aquatic 12 Months         0.00         1         M           M1003         Aquatic Direct Debit         25.00         1         M           M1004         Personal Training 60min Week         140.00         1         M   | Down               |
| M1006 Personal Training 30min Week<br>M1007 Personal Training 2 x 30min W  | M1005         Personal Training 2x x 00min         340.00         1         M           M1006         Personal Training 30mi Veek         80.00         1         M           M1007         Personal Training 2x 30min         160.00         1         M   |                    |
| Tally Service Sales, not Entries   | M 1008         Health Club Je Month         1,000,00         1         M           M 1009         Health Club Direct Debth         35,00         1         M           M 1010         Aquatic Family Membership         1,200,00         1         M           M 1010         Aquatic Family Membership         0,00         1         M  | Show <u>A</u> ll   |
| Access Points Access Point   | C All Location: LOC1 I All Products / Services  | <u>S</u> earch     |
| ONLINE BOOKINGS     RECEPTION  | C Broduct   |                    |
|  | C Sergice Code:   |                    |
|  | C Visit Pass     C Visit Pass   | Selec <u>t</u> All |
|  | Inc. Inactive Supplier: <all suppliers=""></all>  | Seject             |
|  | Columps Cost \$: equals   |                    |
|  |   | Cancel             |

You can also set a tally to be an accumulation of crowd numbers from selected Facilities.

|   |                | C Other Site Parameters |                   |   |   |                      |   |  |  |  |
|---|----------------|-------------------------|-------------------|---|---|----------------------|---|--|--|--|
| 5 |                |                         | Select Facilities | Passes  | Class Types   | Sessions             | ר |  |  |  |
| S | elect Faciliti | es:                     | Facility          | shboarc<br>- Options<br>- Shc<br>- Facility<br>25m nott<br>25m sol<br>50m Lan<br>50M Lan | ow Hourly Tally s Pax h h DM IE 1 e 2 e 3 e 4 acilities Cle off Pax after Bookin Tally Types pe d Total bers Visits | ar All<br>g End Time |   |  |  |  |
|   |                |                         | ✓ OK Cancel       |   | Clear C   | Kane Close           | 1 |  |  |  |
|   |                |                         |                   |   |   |                      |   |  |  |  |



There is also the ability to create a tally that is a combination of other tallies. When setting up the tally then Tick the Tally's to also include.

| 8   | Other Site Parameters X  |
|---|--|
| Details         Stock Stores         Tills         T           Access Points         ClassWeb         Active Carrot         S | Implates Appoint's / Cards Memberships Visit Passes Class Types Sessions Curity SMS Facility fisits Dashboard        |
| Tally Type: Grand Total   | New Delete     Delete     Show Hourly Tally  |
| Services, Memberships and Visit Pass Types Product Code Description   | Class Types Attendance  Description ExtraDescription  Facility  Facility  Facility                                   |
| Add Types Clear All Tally Service Sales, not Entries  | Add Class Types     Clear All       Drop off Attendance after Class End Time     Drop off Pax after Booking End Time |
| Access Points Access Point ONLINE BOOKINGS RECEPTION  | Access Points Access Point ONLINE BOOKINGS RECEPTION   |
|   | Save Delete Clear Close  |

To display hourly totals (last hour) ensure the below setting is applied per Tally Type.

| 8                        | Other Site Parameters  |          |  |  |  |  |  |  |  |
|--------------------------|--|----------|--|--|--|--|--|--|--|
| Details<br>Access Points | Stock Stores         Tills         Templates         Appoint's / Cards         Memberships         Visit Passes         Class Types           ClassWeb         Active Carrot         Security         SMS         Facility <b>/isits Dashboarc</b> | Sessions |  |  |  |  |  |  |  |
| Tally Type:              | Grand Total New Delete Show Hourly Tally   |          |  |  |  |  |  |  |  |

To open the Visits Dashboard from POS go to File> Visit Dashboard.





The following will appear the first time you open the Visit Dashboard.

CLICK HERE TO ADD LOGO

Monday, 19 October 2015 5:17:14 PM

You can setup a logo by right-clicking in the top of the window and adding a file.

Open File... Clear

To set up the tally's you wish to display, right click on open space, select Panel Layout and choose the number you require.

| 2 x 2 | Panel Layout 🔹 🕨         |
|-------|--------------------------|
| 3×2   | Pop Out                  |
| 2×3   | Theme Color              |
| 3×3   | Counter Refresh Rate 🔹 🕨 |
| 4 x 3 | Refresh                  |
|       | Exit                     |

To add a Tally, right click on an area that displays 'Right- Click Here' and select the Tally to add.





If you wish to remove a Tally you can right click on an existing Tally and select the option of clear.

To change the screen refresh rate, right-click in free space, go to the Counter Refresh Rate and select the Rate required.

|            | Panel Layout 🔹 🕨       |
|------------|------------------------|
|            | Pop Out                |
| 5 seconds  | Theme Color            |
| 30 seconds | Counter Refresh Rate 🕨 |
| 1 minute   | Refresh                |
| 5 minutes  | Exit                   |

You can choose the text colour for the Number of visits. This can be done when you rightclick in free space and select 'Theme Colour'.



To exit the screen, right-click in free space and select 'Exit'.



Panel Layout

Theme Color...

Pop Out

Refresh

Exit



The Visit Dashboard will look like the following once setup.



Release Notes 2015.2



# **Facility Changes**

### Ability to view 'Recent Bookings Opened'

From the Links Toolbar you can view and open the recently opened bookings by hovering over the Bookings button.

|                 | i 🔍          |   |   |                | 9                 |                      | Lin        | ks Modular Sol | utions | L                           | - 🗆 X       |
|-----------------|--------------|---|---|----------------|-------------------|----------------------|------------|----------------|--------|-----------------------------|-------------|
|                 | POS/Facility |   |   |                | Welcome To        | - 1                  |            |                |        | 🚳 l in                      | ks          |
| 8.              |              |   |   |                | Locatio           | nI                   |            |                |        | MODULAR SC                  | DUTIONS     |
| മ്പ             | Members      |   |   |                | Recent Activity   | r                    | Fe         | atured Items   |        |                             |             |
| ل <del>تر</del> | Classes      |   |   |                | Customer Setup    | <new entry=""></new> |            | POS/Facilit    |        | Order Entry                 |             |
| <b>~</b>        | Reporting    |   |   |                | Facility Calendar |                      |            | Stock          | >      | Order Receive               |             |
|                 | Admin        |   |   |                | Accounts          |                      | <u>a</u>   | Members        |        | Receive By Supplier         |             |
| •               | Access       |   |   |                |                   |                      | ā          | Classes        |        | Stock Take                  |             |
| 2               | Recent       | > |   |                |                   |                      |            | Reporting      |        | Stock Transfer Single Store |             |
|                 | Bookings     | > | F | acility Bookin | g 86              |                      | Ð          | Admin          |        | Stock Transfer Multi Store  |             |
|                 | 2            |   | F | acility Bookin | g 64              |                      | C          | Access         |        | Stock Adjustment            |             |
| Mo:<br>Fire     | illa<br>fox  |   |   |                |                   |                      |            |                |        |                             |             |
| 0               |              |   |   |                |                   |                      |            |                |        |                             |             |
| Outloo          | k 2013       |   |   |                |                   |                      |            |                |        |                             |             |
|                 |              |   |   |                |                   |                      |            |                |        | Welcor                      | me to Links |
| w               |              |   |   |                | Change Location   | Use Training Mode    | Toolbar Co | nfig           |        | Ab                          | out Links   |

### New Facility Screen size and Look

The Visual Facility Booking screen has a new look and will also now re-size anywhere from 1024 x 768 screen resolution all the way to full screen.

| Cotober 2015  | Meeting Rooms               | visual rounty be       | Court 1            | Quick Times                        | 05:00-14:00                |                      | 14:00-22:00  |  |
|---|-----------------------------|------------------------|--------------------|------------------------------------|----------------------------|----------------------|--|--|
| Mon Tue Wed Thu Fri Sat Sun   |                             |                        |                    | buttons have                       | All Day                    |                      | All Times  |  |
| 28 29 30 1 2 3 4  | Court 2                     |                        |                    | relocated                          | Vacancies                  | Calendar             | 🖉 Color Key  |  |
|   | Assesment                   | Personal Trainer       |                    |                                    | Booking Details            | New Booking          | New Enquiry  |  |
| 17       20       21       22       23       24       23         26       27       28       29       30       31       1         2       3       4       5       6       7       8         Today:       20/10/2015       20/10/2015       20/10/2015       20/10/2015 |                             | Name of                | N<br>but           | lew Calendar Vi<br>ton has been ac | ew<br>dded Booking Nan Col | or Key is<br>ow in a | /  |  |
| Centre Facilities   | Times AC TRIAL              | arent Facility         | Birthday Party     | Creche Bookings                    | Health Club                | outton               |  |  |
| B-50m boom  |                             | Shows B Unavailable In | ne                 | Unavaliable Tir                    |                            |                      | lew Enquiry  |  |
| -Birthday Party   |                             |                        | ne                 | Unavailable Tir                    |                            |                      | Button has   |  |
| Creche Bookings     Health Club   | 05.45 AM Lingsyglighte Time |                        | ne                 | Unavailable Tir                    |                            | havailable Ti        | een Added  |  |
| Meeting Rooms   |                             |                        |                    | Unavailable Tir                    |                            | Inavailable Tim      |  |  |
| B-Stadium   | 0615AM Lingvalable Time     | <u> </u>               |                    | Unavailable Tir                    | ne l                       | navailable Time      |  |  |
|   | 06.30 AM Lingyglighte Time  | 2                      |                    | Unavailable Tir                    | ne l                       | navailable Time      |  |  |
| Laraer Tree   | 06.45 AM Unavailable Time   | 5                      |                    | Unavailable Tir                    | ne l                       | navailable Time      |  |  |
| area for a  | 07.00 AM Unavailable Time   |                        |                    | Unavailable Tir                    | ne l                       | Inavailable Time     |  |  |
| better view   | 07:15 AM Unavailable Time   | Larger Spacing         |                    | Unavailable Tir                    | ne U                       | navailable Time      |  |  |
|   | 07:30 AM Unavailable Time   | of Rows.               |                    | Unavailable Tir                    | ne U                       | navailable Time      |  |  |
|   | 07.45 AM Unavailable Time   | Column's Resizes       |                    | Unavailable Tir                    | ne U                       | Inavailable Time     |  |  |
|   | 08.00 AM Unavailable Time   | automatically          |                    | Unavailable Tir                    | ne U                       | Inavailable Time     |  |  |
|   | OR15AM Unavailable Time     | children facility's    |                    | Unavailable Tir                    | ne U                       | navailable Time      |  |  |
|   | 08:30 AM Unavailable Time   |                        |                    | Unavailable Tir                    | ne U                       | navailable Time      |  |  |
|   | 08.45 AM Unavailable Time   | 2                      |                    | Unavailable Tir                    | ne U                       | Inavailable Time     |  |  |
|   | 09:00 AM                    |                        |                    |                                    |                            |                      |  |  |
|   | 09:15 AM                    |                        |                    |                                    |                            |                      |  |  |
|   | 09:30 AM                    |                        |                    |                                    |                            |                      |  |  |
|   | 09:45 AM                    |                        |                    |                                    |                            |                      |  |  |
|   | 1000AM Port Of Enguine      | (En curier)            | _                  |                                    |                            |                      | <b>`</b>   |  |
| á á.  |                             | Search                 | Confirmation Lette | er Export to Excel                 | Booking Search             | Attendances          | Close  |  |
| 🔋 占 🛛 🚞 🗿 🋞   | <b>11</b>                   |                        |                    |                                    |                            |                      | <ul> <li>Image: Amage: Ama</li></ul> |  |



### Separate Quick Reference Buttons on Facility Visual Scheduler by Host (PC)

You can now have separate sets of quick launch Facility buttons in the Visual Facility Booking by host (PC).

| Health and<br>Wellness Tours | Outdoor<br>Competition Pool<br>50M Lanes | Gym Appointments Spin Room |                            | Indoor Comp Pool<br>50M Lanes |
|------------------------------|--|----------------------------|----------------------------|-------------------------------|
| Basketball Hall              | Diving Pool 25M                          | Show Court                 | Squash Courts              | Stadium                       |
| Spin Room                    | CARPARKS                                 | Birthday Parties           | Champions Room<br>Facility | Netball Areas                 |

When you update a button it now asks you whether you want it for all machines logged into the location or just this host (PC) specifically.

| Host or Location  |
|---|
| Would you like this button saved for all hosts at this location?<br>If you select No, this button will only be set for this host. |
| Yes No  |

### Ability to have multiple Visual Booking Schedulers Open

You can now have multiple Visual Booking Schedulers open at the same time. This allows you to create multiple bookings without the need to close other bookings.

| positive - [Point of Sale] | Visual Facility Bookings | Visual Facility Bookings | Visual Facility Bookings | Visual Facility Bookings |
|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 🗜 占 🗵 🚞                    | o 🌸 🖬                    |                          |                          |                          |



### **Vacancies Search Changes**

From the Vacancies screen you can now switch on the ability to have a drop down options for the time filters rather than manually typing the time in.

| 0  | Visual Scheduler Filters   | X                    |
|--|--|----------------------|
| Avourite Facility Lists Manage                                 | Meeting<br>Rooms     Court 1       Court 2     Personal<br>Trainer       Selected Facility Name       AC TRIAL > 50M Pool  |                      |
| Available Facilities   | >         <  |                      |
| ** Double click on Facility or Favourite<br>to add to the list | Select All Available     Touble click on Booking or Enquiry to View     Include Unavailable Times     Include Enquires     Include Booked Space     Calendar     Book Selected | Expand View<br>Close |

This can be in AM/PM or 24 hour time. To enable and set the option go to Admin> Site> Other Site Parameters (Setup Locations for multi-location)> Facility Tab and select the tick box for 'Use Time Dropdowns on Vacancy Search screen' then choose either AM/PM or 24 Hour.

| 5 |  |                       |               | Ot        | her Site Parame   | eters       |                  |             | ×        |
|---|--|-----------------------|---------------|-----------|-------------------|-------------|------------------|-------------|----------|
| ſ | Details  | Stock Stores          | Tills         | Templates | Appoint's / Cards | Memberships | Visit Passes     | Class Types | Sessions |
|   | Access Points 🎽  | ClassWeb              | Active Carrot | Security  | SMS               | Facility    | Visits Dashboard |             |          |
|   |  |                       |               |           |                   |             |                  |             |          |
|   | Display warning on booking if client owes money on issued invoices |                       |               |           |                   |             |                  |             |          |
|   | Time Dropdown Format   |                       |               |           |                   |             |                  |             |          |
|   | 🔲 Validate Pr  | roduct/Service(s) for | Facility      |           |                   |             | ● AM/PM ○ 2      | 24-Hour     |          |



There is now the option to add booking lines to a booking when they would otherwise be unavailable. For example when making a booking from the vacancies screen, you can choose to select Unavailable Times, Enquiries and Booked Space (if booking an enquiry) if you have the correct security group privileges.

| 8   |   | Visual Scheduler Filter  | s   | ×                   |
|---|---|--|---|---------------------|
| -vovurite Facility Lists Manage<br>Favourite Name | Meeting<br>Rooms<br>Court 2<br>Assesment<br>Selected Facility N<br>AC TRIAL > 50M F   | Personal Co  | burt 1  |                     |
| Available Facilities                              | Filters       Between:     22 0CT 2015       D     D       Between:     05:00 AM       Thursday     Filday       Results     Facility       Facility     To Son Deal            | and: 22 0CT 2015 D<br>and: 08:00 AM ▼<br>□ Tuesday □ Wednesday<br>□ Saturday □ Sunday<br>Date From Time<br>Date 20.05 400 AM   | Apply<br>Calculate OffPeak Charge<br>Show All Times<br>To Time Status Details<br>De15 5 M. Available  |                     |
| ** Double click on Facility of Faculty            | 2004 Pool     T     2004 Pool     T     2004 Pool     T     5004 Pool     T | 1112 20 of 2015 06:15 AM<br>1112 20 of 2015 06:30 AM<br>1112 20 of 2015 06:30 AM<br>1112 20 of 2015 07:00 AM<br>1112 20 of 2015 07:00 AM<br>1112 20 of 2015 07:30 AM<br>1112 20 of 2015 07:45 AM<br>1112 20 of 2015 07:45 AM | Oli 30 AM Available     Oli 30 AM Available     Oli 30 AM Available     Oli 45 AM Available     Oli 45 AM Available     Oli 15 AM Available     Oli 45 AM Available | Expand View         |
| to add to the list                                | Select All Available     Include Unavailable Times     Vinclude Enquiries     Include Booked Space  | Bouble   | Calendar  | Book Selected Close |

These options are based on the user privileges and are changed through Security Group Settings. These are set up through Admin> Security> Security Groups> Facility Tab.

| a   | Security Group Setup   |
|---|--|
| Group Code:       ADMINISTRATOR         Description:       ADMINISTRATOR         Image: Administrator Group         Modules       POS         VP       Facility         Can modify facility bookings.         Can create casual bookings - cash only.         Can assign staff/assets.         Only book         Only book         Only book         Only book lowest level facilities.         Only book lowest level facilities.         Can web book location's facilities.         Can modify Booking Charge after Payment made         Booking Start/Finish Times:         0       15         Allowed Facilities | Classes       Members         consult link       Image: Staff Code Last Name         Image: Staff Code Last Name       Image: Staff Code Last Name         Image: Staff Code Last Name       Image: Staff Code Last Name         Image: Consult link       Image: Code Last Name         Image: Code Last Name       Image: Code Last Name         Image: Code Last Name       Image: Code Last Name         Image: Code Last Name       Image: Code Last Name <tr< th=""></tr<> |
|   | Menu<br>Security Save Delete Clear Clone Close   |



### Facility Favourites

You can now setup a Favourite Facility List. The Favourite allows you to select from preselected booking options rather than having to select these options individually off the facility tree.

An example of this would be a Carnival that we have called Carnival A. This uses Lanes 1-5 of the 50m Pool and the Male & Female Change Rooms. When the favourite of Carnival A is selected, it pre fills with the selected Facilities setup for Carnival A.

| 8  | Visual Scheduler Filters  | x                  |
|--|---|--------------------|
| Avalable Facilities  | Visual Scheduler Filters         Meeting<br>Rooms       Stadium       Court 1         Assesment       Personal<br>Trainer       Court 2         Assesment       Personal<br>Trainer       Court 1         >       Ac TRIAL 50M Pool 50M Lane 1<br>AL TRIAL 50M Pool 50M Lane 2<br>AL TRIAL 50M Pool 50M Lane 4<br>AL TRIAL 50 | ×                  |
| ** Double click on Facility or Favourite<br>to add to the list | Select All Available         ** Double click on Booking or Enquiry to View         Ex           Include Unavailable Times         Include Enquires         Calendar         Book Selected   | pand View<br>Close |

Favourites are set up in Admin> Facility> Facility Favourites. In this screen, all Staff/User Roles are available to add Facility Favourites to.

- 1. Select a User Role
- 2. Select the New button
- 3. Enter a description for the Favourite
- 4. Select 'Add' to select the Facilities to add to this Favourite



|   | Select Facilities  |
|---|--|
| Manage Facility Favourites         Create or Edit the lists of favourite Facilities for the selected Role         User Role:       Bookings         Favourite:       CARNIVAL A         Description:       CARNIVAL A         Facilities       Facility Name         Add       Remove | Select Facilities:  Facilities  Facilities  Facility  Car TriAL/SOM Pool/SOM Lare 1/ AC TriAL/SOM Pool/SOM Lare 1/ AC TriAL/SOM Pool/SOM Lare 2/ AC TriAL/SOM Pool/SOM Lare 2/ AC TriAL/SOM Pool/SOM Lare 2/ AC TriAL/SOM Pool/SOM Lare 4/ SOM Lare 2 AC TriAL/SOM Pool/Som Lare 4/ SOM Lare 4 SoM Lare 5 SOM Lare 6 |
| Select All     Delete     Cancel Save Close   | < <u> </u>   |
|   | OK X Cancel  |

5. The List of Facilities will now show select 'Save'.

|  | Manage Facility   | Favourites  |        |
|--|---|-------------|--------|
| Create or Edit   | the lists of favourite Facilities for the selected  | i Role      |        |
| User Role:<br>Favourite:   | Bookings<br>CARNIVAL A  | ▼<br>▼ New  |        |
| Description:   | CARNIVAL A  |             |        |
| Facilities<br>Facility Nam<br>AC TRIAL ><br>AC TRIAL ><br>AC TRIAL ><br>AC TRIAL ><br>AC TRIAL > | e<br>50M Pool > 50M Lane 1<br>50M Pool > 50M Lane 2<br>50M Pool > 50M Lane 3<br>50M Pool > 50M Lane 4<br>Change Rooms > Change Room 1 Female<br>Change Rooms > Change Room 1 Male |             | Remove |
| Select All   |   |             |        |
| Delete   | ]   | Cancel Save | Close  |

These favourites can be edited once created by Selecting the 'User Role' then selecting the 'Favourite'.



|  | Manage Facility Favourites                                |
|--|---|
| Create or Edit                           | t the lists of favourite Facilities for the selected Role |
| User Role:<br>Favourite:<br>Description: | Bookings   CARNIVAL A                                     |
| Facilities<br>Facility Nam               | ne Add<br>Remove  |
| Select All                               | Cancel Save Close   |

Favourites are allocated by Staff Role. If a Staff member does not have this role against them, they will not see the Favourite List to use.

If needed, staff can be added to a role in bulk by through Admin> Admin> Staff Roles. Select the 'Role', select the 'Add New Staff' button and add all applicable staff.

| 5                | Roles         | x |
|------------------|---------------|---|
| Roles            |               |   |
| Bookings         | ▼             |   |
|                  | <u>^</u>      |   |
|                  | Setup         |   |
| Staff Staff Name | Staff Code    |   |
|                  |               |   |
|                  |               |   |
|                  |               |   |
| 1                | Add New Staff |   |
|                  | Close         |   |



### Facility Calendar View

In addition to the Visual Booking Scheduler, you can now access a new monthly and weekly calendar view. These can be accessed via POS> Facility> Facility Calendar or the Calendar button on the Visual Facility Booking screen.

| 🗊 File 🗌   | Till | Facility |                 | Maintain       | Customers | Rete | ention | 4 |
|------------|------|----------|-----------------|----------------|-----------|------|--------|---|
| Curren     | t Tr |          | Vis             | ual Facility I | Bookings  |      |        |   |
|            |      |          | Fac             | ility Calend   | ar        |      |        | _ |
| Descriptio |      |          | Ne              | w Enquiry      |           |      |        | _ |
| Descri     | puc  |          | Enquiry Manager |                |           |      |        |   |
|            |      |          |                 |                |           |      | -      |   |

| 05:00-14:00     |             | 14:00-22:00 |
|-----------------|-------------|-------------|
| All Day         |             | All Times   |
| Vacancies       | Calendar    | Color Key   |
| Booking Details | New Booking | New Enquiry |

The Calendar will open to the last Facility that was looked at or when opening from the Visual Facility Booking screen the Facility that is selected in the Tree. The default view is weekly.

| 8                               |                                 |                                      | F                                   | acility Calendar              |          |        | - 0 ×  |
|---------------------------------|---------------------------------|--------------------------------------|-------------------------------------|-------------------------------|----------|--------|--------|
| Select Facilities Start Date: 2 | 0/10/2015 • << < by week        | by month > >>                        | o Screen Bookings and Enquiries 💌 🗆 | Show Name Only Colour Key Clo | se       |        |        |
|                                 | 20 Oct                          | 21                                   | 22                                  | 23                            | 24       | 25     | 26     |
|                                 | Tuesday                         | Wednesday                            | Thursday                            | Friday                        | Saturday | Sunday | Monday |
| SOM Pool                        | School carnival, TEST SCHOOL    | School Carnival, TEST SPORTS CLUB    |                                     |                               |          |        |        |
| 50M Lone 1                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Ot, TEST SPORTS CLUB |                                     |                               |          |        |        |
| 50M Lone 2                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |
| 50M Lone 3                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |
| 50M Lone 4                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |
| 50M Lone 5                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |
| SOM Lone 6                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |
| 50M Lone 7                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |
| 50M Lane 8                      | Enquiry as Part Of, TEST SCHOOL | Enquiry as Part Of, TEST SPORTS CLUB |                                     |                               |          |        |        |

The user can select a location and required facilities to display.



| the Facility Calendar   | - 🗆 X    |
|---|----------|
| Select Facilities Start Date: 20/10/2015 🔹 << < by week by month > >> 🗆 🗆 Fit To Screen Bookings and Enquiries 🔹 🗖 Show Name Only Colour Key Close  |          |
| Image: OK       Image: OK | <b>_</b> |
| Facilities:  □ Centre Facilities  ③ □ Centre Facilities  ③ □ Centre Facilities  ③ □ AC TRIAL  |          |
|   |          |
|   |          |
|   |          |
|   | •        |

Selected facilities will display the bookings over the selected date period using the below colour-key.





More detail can be seen by hovering over a booking.

| 8                               |                           |                           | Facility                  | Calendar                   |                               |                  | _ 🗆 X                     |
|---------------------------------|---------------------------|---------------------------|---------------------------|----------------------------|-------------------------------|------------------|---------------------------|
| Select Facilities Start Date: 2 | 20/10/2015 💌 << <         | by week by month          | > >> 🗆 Fit                | To Screen Bookings and Enq | uiries 💌 🗌 Show Name          | only Colour Key  | Close                     |
|                                 | 20 Oct                    | 21                        | 22                        | 23                         | 24                            | 25               | 26                        |
| Skereliues                      | Tuesday                   | Wednesday                 | Thursday                  | Friday                     | Saturday                      | Sunday           | Monday                    |
| Siddishi                        | BOOKINGS: 4 NOURS         | Bookings: 4 hours         | Bookings: 4 hours         | BOOKINGS: 4 NOURS          |                               |                  | Bookings: 4 hours         |
|                                 | Basketball Iraining, IEST | Basketball Iraining, IEST | Basketball Iraining, IEST | Basketball Iraining, IEST  | CTA DULLA                     |                  | Basketball Iraining, IEST |
|                                 |                           |                           |                           |                            | STADIUM<br>Frider: 02/10/0015 |                  |                           |
|                                 |                           |                           |                           |                            | 7:00 PM - 9:00 PM             |                  |                           |
| Court 1                         | Basketball Training, TEST | Basketball Training, TEST | Basketball Training, TEST | Basketball Training, TEST  | 7.001.00                      |                  | Basketball Training, TEST |
|                                 | Booked as Part Of, TEST    | Booking ID: 77                |                  | Booked as Part Of, TEST   |
|                                 |                           |                           |                           |                            | Booking Name: Bas             | ketball Training |                           |
|                                 |                           |                           |                           |                            | Client Name: TEST SI          | PORTS CLUB       |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |
| Court 2                         | School Sport Volley       | School Sport Volley       | School Sport Volley       | School Sport Volley        |                               |                  | School Sport Volley       |
|                                 | Booked as Part Of, TEST    |                               |                  | Booked as Part Of, TEST   |
|                                 |                           |                           |                           |                            |                               |                  |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |
| Badminton 1                     | Booked as Part Of, TEST    |                               |                  | Booked as Part Of, TEST   |
|                                 | Booked as Part Of, TEST    |                               |                  | Booked as Part Of, TEST   |
|                                 |                           |                           |                           |                            | 1                             |                  |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |
| bddminion 2                     | Booked as Part Ot, IEST   | Booked as Part Ot, IEST   | Booked as Part Ot, IESI   | Booked as Part Ot, IESI    |                               |                  | Booked as Part Ot, IESI   |
|                                 | Booked as Part Ot, IEST   | Booked as Part Ot, IEST   | Booked as Part Ot, IESI   | Booked as Part Ot, IEST    |                               |                  | Booked as Part Ot, IEST   |
|                                 |                           |                           |                           |                            |                               |                  |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |
| Badminton 3                     | Booked as Part Of, TEST    |                               |                  | Booked as Part Of, TEST   |
|                                 | Booked as Part Of, TEST    |                               |                  | Booked as Part Of, TEST   |
|                                 |                           |                           | Î                         |                            | 1                             |                  |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |
|                                 |                           |                           |                           |                            |                               |                  |                           |

The display can be changed to monthly view and dates changed using the calendar controls.

| <b>1</b> 3.       |                        |        |         |          |   |    | Facility Calendar                                       |
|-------------------|------------------------|--------|---------|----------|---|----|---|
| Select Facilities | Start Date: 20/10/2015 | <<   < | by week | by month | > | >> | Fit To Screen Bookings and Enquiries 💌 🗆 Show Name Only |

Monthly View.

| 3                               |                  |               |                  |              |                  |                  |              |                  |              |                  |              | Fac       | cility C  | alend        | ar           |              |              |              |                 |          |          |           |           |           |           |           |           |           | L         | - 0       | ×         |
|---------------------------------|------------------|---------------|------------------|--------------|------------------|------------------|--------------|------------------|--------------|------------------|--------------|-----------|-----------|--------------|--------------|--------------|--------------|--------------|-----------------|----------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Select Facilities Start Date: 2 | 0/10/2015        | ; <b>-</b>    | <                | <   •        | <                | by we            | ek           | by mo            | nth          | >                | >>           |           | 🔽 Fit 1   | o Scree      | en Bo        | okings a     | and Eng      | uiries       | •               | ⊏ s      | how Na   | me Onl    |           | Colour    | Key       |           | Close     |           |           |           |           |
|                                 | 20 2<br>Oct V    | 21 :<br>Ned 1 | <b>22</b><br>Thu | 23<br>Fri    | <b>24</b><br>Sat | <b>25</b><br>Sun | 26<br>Mon    | <b>27</b><br>Tue | 28<br>Wed    | <b>29</b><br>Thu | 30<br>Fri    | 31<br>Sat | 01<br>Nov | 2<br>Mon     | 3<br>Tue     | 4<br>Wed     | 5<br>Thu     | 6<br>Fri     | <b>7</b><br>Sat | 8<br>Sun | 9<br>Mon | 10<br>Tue | 11<br>Wed | 12<br>Thu | 13<br>Fri | 14<br>Sat | 15<br>Sun | 16<br>Mon | 17<br>Tue | 18<br>Wed | 19<br>Thu |
| Stadium                         | Bool<br>Bask B   | Bool<br>Bask  | Bool<br>Bask     | Bool<br>Bask |                  |                  | Bool<br>Bask | Bool<br>Bask     | Bool<br>Bask | Bool<br>Bask     | Bool<br>Bask |           |           | Bool<br>Bask | Bool<br>Bask | Bool<br>Bask | Bool<br>Bask | Bool<br>Bask |                 |          | Bool     | Bool      | Bool      | Bool      | Bool      |           |           | Boo       | Bool      | Bool      | Boo       |
| Court 1                         | Bask  <br>Bool   | Bask<br>Bool  | Bask<br>Bool     | Bask<br>Bool |                  |                  | Bask<br>Bool | Bask<br>Bool     | Bask<br>Bool | Bask<br>Bool     | Bask<br>Bool |           |           | Bask<br>Bool | Bask<br>Bool | Bask<br>Bool | Bask<br>Bool | Bask<br>Bool |                 |          | Bask     | Bask      | Bask      | Bask      | Bask      |           |           | Bask      | Bask      | Bask      | Basi      |
| Court 2                         | Scht 3<br>Bool 3 | Sche<br>Bool  | Scht<br>Bool     | Schc<br>Bool |                  |                  | Sche<br>Bool | Scht<br>Bool     | Sche<br>Bool | Scht<br>Bool     | Scht<br>Bool |           |           | Scht<br>Bool | Sche<br>Bool | Scht<br>Bool | Sche<br>Bool | Sche<br>Bool |                 |          | Sche     | Sche      | Sche      | Scho      | Scho      |           |           | Sch       | Scho      | Sche      | Sch       |
| Badminton 1                     | Bool Bool        | Bool<br>Bool  | Bool<br>Bool     | Bool<br>Bool |                  |                  | Bool<br>Bool | Bool<br>Bool     | Bool<br>Bool | Bool<br>Bool     | Bool<br>Bool |           |           | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool |                 |          | Bool     | Bool      | Bool      | Bool      | Bool      |           |           | Boo       | Bool      | Bool      | Boo       |
| Badminton 2                     | Book<br>Book     | Bool<br>Bool  | Bool<br>Bool     | Bool<br>Bool |                  |                  | Bool<br>Bool | Bool<br>Bool     | Bool<br>Bool | Bool<br>Bool     | Bool<br>Bool |           |           | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool |                 |          | Bool     | Bool      | Bool      | Bool      | Bool      |           |           | Boo       | Bool      | Bool      | Boo       |
| Badminton 3                     | Bool<br>Bool     | Bool<br>Bool  | Bool<br>Bool     | Bool<br>Bool |                  |                  | Bool<br>Bool | Bool<br>Bool     | Bool<br>Bool | Bool<br>Bool     | Bool<br>Bool |           |           | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool | Bool<br>Bool |                 |          | Bool     | Bool      | Bool      | Bool      | Bool      |           |           | Boo       | Bool      | Bool      | Boo       |



You can see a Daily view by double clicking on a date in the Calendar.

| 8                               |                    |       |       |       |         |                                      |                 | I     | acility | Calenda    | ar     |             |                                       |                         |        |          |       |           |   |       | -     |       |
|---------------------------------|--------------------|-------|-------|-------|---------|--------------------------------------|-----------------|-------|---------|------------|--------|-------------|---------------------------------------|-------------------------|--------|----------|-------|-----------|---|-------|-------|-------|
| Select Facilities Start Date: 2 | 0/10/2015 💌        | Zoo   | n -   | <   E | oy week | >                                    | Zoor            | n +   | 🔽 Fit   | t To Scree | n Book | kings and l | Enquiries                             | •                       | ☐ Shov | v Name O | nly   | Colour Ke | close   |       |       |       |
| Stadium                         | Tue<br>00:00 01:00 | 02:00 | 03:00 | 04:00 | 05:00   | 06:00                                | 07:00           | 08:00 | 09:00   | 10:00      | 11:00  | 12:00       | 13:00                                 | 14:00                   | 15:00  | 16:00    | 17:00 | 18:00     | 19:00 20:00<br>Basketball<br>Training, TEST<br>SPORTS<br>CLUB | 21:00 | 22:00 | 23:00 |
| Court 1                         |                    |       |       |       |         | Basket<br>Training<br>SPORTS<br>CLUB | ball<br>a, TEST |       |         |            |        |             |                                       |                         |        |          |       |           | Booked as<br>Part Of, TEST<br>SPORTS<br>CLUB                  |       |       |       |
| Court 2                         |                    |       |       |       |         |                                      |                 |       |         |            |        |             | Schoo<br>Sport V<br>Ball, TE<br>SCHOO | l<br>Volley<br>ST<br>DL |        |          |       |           | Booked as<br>Part Of, TEST<br>SPORTS<br>CLUB                  |       |       |       |
| Badminton 1                     |                    |       |       |       |         |                                      |                 |       |         |            |        |             | Booker<br>Part Of<br>SCHOO            | d as<br>f, TEST<br>DL   |        |          |       |           | Booked as<br>Part Of, TEST<br>SPORTS<br>CLUB                  |       |       |       |
| Badminton 2                     |                    |       |       |       |         |                                      |                 |       |         |            |        |             | Booker<br>Part Of<br>SCHOO            | d as<br>f, TEST<br>DL   |        |          |       |           | Booked as<br>Part Of, TEST<br>SPORTS<br>CLUB                  |       |       |       |
| Badminton 3                     |                    |       |       |       |         |                                      |                 |       |         |            |        |             | Booker<br>Part Of<br>SCHOO            | d as<br>f, TEST<br>DL   |        |          |       |           | Booked as<br>Part Of, TEST<br>SPORTS<br>CLUB                  |       |       |       |

You can filter on the types you wish to view.

| 8                 |                        |             | Fac           | cility Calendar |                                 |
|-------------------|------------------------|-------------|---------------|-----------------|---------------------------------|
| Select Facilities | Start Date: 21/10/2015 | < < by week | by month > >> | ▼ Fit To Screen | Bookings and Enquiries          |
|                   | 21 Oct                 | 22          | 23            | 24              | Bookings Only<br>Enquiries Only |
| Stadium           |                        | Thursday    | Friday        | Saturday        | Clashes Only                    |



### Changes to the Create Booking Screen

There have been a large amount of additions and changes in the Create booking screen.



The following are the changes made to the Create booking Screen:

- Addition of Major Events option
- Ability to select which client you wish to have as the contact for the booking
- Addition of a PO Number section
- Addition of recording Pax per booking Line
- Ability to show the duration of the booking per hour instead of Minutes
- Pre/Post renamed to setup/packdown
- Ability to use default setup/packdown times for a booking
- Ability to edit products/services per booking line
- Multi edit screen now allows for bulk edit of products and services
- Letter and Email Buttons have moved and allow for saving the Confirmation to a specific document folder
- Document button, allows to view all documentation on this booking as well as emails sent
- Booking change log has moved
- An apply changes button has been added to allow for the booking to update without making the booking and then going back in to make changes



### **Major Event Option**

Using the Major event option, allows you to report on facility bookings that includes specific details required by large centres that run large events.

When making a booking select the 'Major Event' option.

| 8                  |   |                 |                     |                                     | Facility Booki             | ng 81           |                   |                     |                        |                        | x   |
|--------------------|---|-----------------|---------------------|-------------------------------------|----------------------------|-----------------|-------------------|---------------------|------------------------|------------------------|---|
|                    | Date Boo                                      | ked: Thu        | 1 22/10/2015        | Boo                                 | king ID 81                 |                 | Ref #             | 173 to 17           | 9 inclusi              | /e                     |   |
| Extensions         | C Casual U                                    | se Booking      | Name: Regional St   | wimming Carnival                    |                            |                 |                   |                     | -I Multip              | le Bookings            |   |
| Event              | <ul> <li>C Custome</li> <li>Client</li> </ul> | CI              | ient Id: 8          | New                                 | View Contact:              | JENNY           |                   | -                   | C End I                | Date:                  | D   |
| Details            |   |                 | Name: SCHOOLSI      | NSW                                 |                            |                 |                   |                     | C Perio                | d:                     |   |
| Enquiry<br>Details | <ul> <li>C Confirme</li> </ul>                | M<br>bo         | tructions:          | Account () La                       | 0/255                      | Status:         |                   |                     | Booking 1              | уре:                   | ~   |
|                    |   | Prim            | e Usage:            |                                     | •                          | r o riumber.    | 🗌 Perman          | ent Booking         |                        |                        | View Details  |
| Facility Name      | ,   | Date            | Day From Time       | e ToTime                            | Attended Pax               | Duration (mins) | No. Periods       | \$ Per Period       | Charge (\$)            | Service Nan            | ne  |
| 50M Pool           |   | 22/10/2015      | Th 08:00 AM         | 02:00 PM                            |                            | 360             | 24                | 250.00              | 6000.00                | Pool Hire<br>Real Hire |   |
| 50M Pool           |   | 12/11/2015      | Th 08:00 AM         | 02:00 PM                            |                            | 360             | 24                | 250.00              | 6000.00                | Pool Hire              |   |
| 50M Pool           |   | 19/11/2015      | Th 08:00 AM         | 02:00 PM                            |                            | 360             | 24                | 250.00              | 6000.00                | Pool Hire              |   |
| Total owing on     | this booking lir                              | e is \$6,000.00 | Cother Booking      | Setup/F<br>Before:<br>ng Charge Det | Packdown<br>After:<br>ails | Apply           | Apply<br>Defaults | Add Booking<br>Line | Cancel<br>Booking Line | Edit<br>Booking        | ▶<br>Peak Period<br>Off Peak Period<br>Setup/Packdown |
| Date               |   | Amt             | Service Nam         | e                                   |                            | Qty             | Hours             | \$ Per Hou          | r Cha                  | rge (\$)               | -   |
| Viev               | v Details                                     | Add             |                     |                                     |                            |                 |                   |                     |                        |                        |   |
| Credit             | Assets  | Staff           | overridden          | Add Service                         | e Add Produc               | t Edit Prod     | uct/Service       | Selected Boo        | king Total \$: [       | 6,000.00               |   |
| Credit             | Amount  | Remai           | Tran ID I           | Payment Date                        | Amount, \$                 |                 | Grou              | up Booking Total:   | : \$                   | 24000.00               |   |
|                    |   |                 |                     |                                     |                            |                 |                   | Total Paid:         | \$                     | 0.00                   |   |
|                    |   |                 |                     |                                     |                            |                 |                   | Outstanding:        | :\$                    | 24000.00               |   |
|                    |   |                 |                     |                                     |                            |                 |                   |                     |                        |                        |   |
| Documer            | nts Lette                                     | r Ema           | ail Bookin<br>Acces | g Change<br>s Log                   | e Payment S                | chedule >>      | Update and Pa     | y Apply Char        | nges Upd               | late Cl                | ose   |

Details of the major event can be added for applicable dates in the below screen.

NOTE: Crowd Numbers here is manual input separate to booking crowds

| E | 3.            |            |            |         |                 | Event           | Details - Facili   | ty Booking 8   | 3             |                |                  |           | -   |     | x |
|---|---------------|------------|------------|---------|-----------------|-----------------|--------------------|----------------|---------------|----------------|------------------|-----------|-----|-----|---|
|   | Event<br>Name | Date       | Start      | Finish  | Gates<br>Open   | Arrival<br>Time | Facility<br>Booked | Event<br>Level | Setup<br>Mode | File<br>Number | Crowd            | Transport |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   | Add Event     | Edit       | t Event    | Clone E | vent Dele       | te Event        |                    |                |               |                |                  |           | _   | _   |   |
|   | Add Event     |            |            |         |                 |                 |                    |                |               |                |                  |           |     |     |   |
|   | Event Name    | : Regional | Swiming Ca | rnival  |                 |                 | Facility Group:    | Carnival A     | •             | Tran           | sport:           |           | _   |     |   |
|   | Event Date    | : 22/10/2  | 015        | •       | Crowd: 0        |                 | Event Level:       | Regional       | •             |                | Transport<br>Bus |           |     |     |   |
|   | Start Time    | : 10:00:0  | 0 AM       | Gates   | s Open: 9:30:   | 00 AM 🔹         | Setup Mode:        | Long Course    | •             | 🔽              | PV<br>Trains     |           |     | -1  |   |
|   | Finish Time   | 2:00:0     | 0 PM 🗦     | Arriva  | al Time: 8:00:0 | 00 AM 🕂         | File Number:       | 123456         |               |                | Trains           |           |     |     |   |
|   |               |            |            |         |                 |                 |                    |                |               |                | Save             | ·         | Can | cel |   |
|   |               |            |            |         |                 |                 |                    |                |               |                |                  | _         | Clo | se  |   |



Once saved a row can be cloned to another date for ease of data entry. The date will automatically select the next booking date if this booking has multiple dates.

| 0                          |            |           |         | Eve           | ent Details -   | Facility Booking   | g 81           |               |                |       | _ 🗆 X             |
|----------------------------|------------|-----------|---------|---------------|-----------------|--------------------|----------------|---------------|----------------|-------|-------------------|
| Event Name                 | Date       | Start     | Finish  | Gates<br>Open | Arrival<br>Time | Facility<br>Booked | Event<br>Level | Setup<br>Mode | File<br>Number | Crowd | Transport         |
| Regional Swimming Carnival | 22/10/2015 | 8:00 AM   | 2:00 PM | 8:30 AM       | 8:00 AM         | Carnival A         | School         | Long Course   | 123456         | 1500  | Bus + PV + Trains |
| Regional Swimming Carnival | 5/11/2015  | 8:00 AM   | 2:00 PM | 8:30 AM       | 8:00 AM         | Carnival A         | School         | Long Course   | 123456         | 1500  | Bus + PV + Trains |
| Regional Swimming Carnival | 12/11/2015 | 8:00 AM   | 2:00 PM | 8:30 AM       | 8:00 AM         | Carnival A         | School         | Long Course   | 123456         | 1500  | Bus + PV + Trains |
| Add Event Edit E           | Event      | Clone Eve | ent Di  | elete Event   |                 |                    |                |               |                |       |                   |
|                            |            |           |         |               |                 |                    |                |               |                |       |                   |

You also have the ability to remove a Major Event from a booking by unselecting the 'Major Event' Option. This will clear the event data.

| 8  | Facility Booking 81   | x              |
|--|---|----------------|
| Extensions<br>Major Event<br>Details<br>Enquiry<br>Details<br>Casual Use<br>Casual Use<br>Casual Use<br>Casual Use<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction<br>Construction | U 22/10/2015 Booking ID 81 Ref # 173<br>Name: Regional Swimming Carnival<br>Xient Id: 8 New View Contact: JENNY<br>Name: SCHOOLS NSW<br>Method:   Invoice Account C Cash On Arrival<br>V255 PD Number   | ]              |
| Facility Name Date<br>► 50M Paol 22/10/2015  | structorise:       0.235       PO Number:       View Details         ne Usage:       Image:       Image:       Image:       View Details         Day       From Time       To Time       Attended Pax       Duration (mins)       No. Periods       \$ Per Period       Charge (\$)       Service Name         Th       08:00 AM       02:00 PM       0       350       24       250:00       6000:00       Pool Hire |                |
| Total owing on this booking line is \$6,000.0<br>Adjustments   | Clear Major Event<br>All event data for this booking will be cleared. Are you sure you wish to proceed?<br>Yes No<br>ur Charge (\$)   | )<br>>d<br>nwn |
| View Details Add       Credit     Assets     Staff       Credit     Amount     Remai   | * · Price was<br>overridden Add Service Add Product Edit Product/Service Selected Booking Total \$: 6.000.00      Tran ID Payment Date Amount, \$     Group Booking Total \$ 6000.00      Total Paid: \$ 0.00      Outstanding: \$ 6000.00  |                |
| Documents Letter En  | nail Booking Change Payment Schedule >>> Update and Pay Apply Changes Update Close  |                |



The report is found in Reporting> Facility> Major Events Summary.

| B Major Events Summary   | X       |
|--|---------|
|  | Print   |
| Select Date(s)           From:         21 0001/2015         D         To:         21 0001/2015         D | Export  |
| Cutput Options   | Preview |
|  | Close   |

### Grouped by Event Date option

#### Test 3 Location 1

#### Major Events Summary - Loc1

| Date       | Event Name                   | Event Level | Start    | Finish   | Facility Booked | Setup Mode  | Crowd | Arrival<br>Time | Gates<br>Open | Transport Mode    | Status    | File # | ID |
|------------|------------------------------|-------------|----------|----------|-----------------|-------------|-------|-----------------|---------------|-------------------|-----------|--------|----|
| 22/10/2015 | Regional Swimming<br>Camival | School      | 08:00 AM | 02:00 PM | Carnival A      | Long Course | 1500  | 08:00 AM        | 08:30 AM      | Bus + PV + Trains | Confirmed | 123456 | 81 |
| 29/10/2015 | National School Camival      | School      | 08:00 AM | 02:00 PM | Carnival A      | Long Course | 2000  | 08:00 AM        | 08:30 AM      | Bus + PV + Trains | Confirmed | 112233 | 82 |
| 29/10/2015 | National School Camival      | School      | 11:00 AM | 02:00 PM | Carnival B      | Long Course | 2000  | 10:00 AM        | 10:30 AM      | Bus + PV + Trains | Confirmed | 112255 | 82 |
| 29/10/2015 | National School Camival      | School      | 03:00 PM | 06:00 PM | Carnival A      | Long Course | 800   | 01:00 PM        | 02:30 AM      | Bus + PV + Trains | Confirmed | 115544 | 82 |

End of report.

### Or Grouped by Booking ID

#### Test 3 Location 1

#### Major Events Summary - Loc1

| Date       | Event Name                   | Event Level | Start    | Finish   | Facility Booked | Setup Mode  | Crowd | Arrival<br>Time | Gates<br>Open | Transport Mode    | Status    | File # | ID |
|------------|------------------------------|-------------|----------|----------|-----------------|-------------|-------|-----------------|---------------|-------------------|-----------|--------|----|
| 22/10/2015 | Regional Swimming<br>Camival | School      | 08:00 AM | 02:00 PM | Carnival A      | Long Course | 1500  | 08:00 AM        | 08:30 AM      | Bus + PV + Trains | Confirmed | 123456 | 81 |
| 29/10/2015 | National School Camival      | School      | 08:00 AM | 02:00 PM | Carnival A      | Long Course | 2000  | 08:00 AM        | 08:30 AM      | Bus + PV + Trains | Confirmed | 112233 | 82 |
| 29/10/2015 | National School Camival      | School      | 11:00 AM | 02:00 PM | Carnival B      | Long Course | 2000  | 10:00 AM        | 10:30 AM      | Bus + PV + Trains | Confirmed | 112255 | 82 |
| 29/10/2015 | National School Camival      | School      | 03:00 PM | 06:00 PM | Carnival A      | Long Course | 800   | 01:00 PM        | 02:30 AM      | Bus + PV + Trains | Confirmed | 115544 | 82 |

End of report.

The event fields are also available to add as merge fields to your confirmation letters if required.



| service and the | NGS REVIEW VIEW   |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|-----------------|---|-----------------|---|-------------------------------|-------------------|-------------|---------------|---|---|--|--|--|--|
| 1               | Rules *   |                 | 1   |                               |                   |             |               |   |   |  |  |  |  |
| ) ا<br>د ما است | Hatch Fields  | <u> </u>        | Find Re   | cipient                       | Eininh B          |             |               |   |   |  |  |  |  |
| ing inser       | ield -  | eview<br>esults | Check   | for Errors                    | Merge *           |             |               |   |   |  |  |  |  |
| 8. Ir           | ClientCreditOnAccount   |                 | view Res  | ults                          | Finish            |             |               |   |   |  |  |  |  |
|                 | ClientCreditForBooking  |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 | AdjustmentDateTime  |                 | ustome  | rFirstName»                   | ClientContactF    | irst».      |               |   |   |  |  |  |  |
|                 | AdjustmentReason  |                 |   |                               |                   | ,           |               |   |   |  |  |  |  |
|                 | AdjustmentAmount  |                 | Account   | :: «ClientCred                | itOnAccount»      |             |               |   |   |  |  |  |  |
|                 | TotalAdjustments  |                 | d for th  | is booking: «                 | ClientCreditFor   | Booking»    |               |   |   |  |  |  |  |
|                 | InvoicePrefix   |                 | v a conf  | irmation of y                 | our booking ma    | de with «Lo | cationNa      | ame».                                       |   |  |  |  |  |
|                 | GrandTotalGST   |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 | OtherBookingGSTAmount   |                 | culars  |                               |                   |             |               |   |   |  |  |  |  |
|                 | OtherBookingChargeExGST   |                 | umber «BookingReterenceNumber»<br>«BookingName» |                               |                   |             |               |   |   |  |  |  |  |
|                 | BookingBalance  |                 |   | «BookingStatus»               |                   |             |               |   |   |  |  |  |  |
|                 | Dookingbalance<br>DavmentScheduleDate   |                 | nt<br>s   | «PaymentMet<br>«Instructions» | hod»              |             |               |   |   |  |  |  |  |
|                 | PaymentScheduleDueAmount  |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 | PaymentScheduleCommont  |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 | PaghierDay  |                 | ils   |                               |                   |             |               |   |   |  |  |  |  |
|                 | bookingbay  |                 |   | Pax                           | Date              | From        | То            | GST   | Charges   | Charges  | Hourly   |  |  |
|                 |   |                 |   | «Eaci                         | it «EacilityBooki | #EacilityB  | «Eacilit      | «Facilit                                    | EX GST  | « Facility B   | Rate   |  |  |
| 1.1             | I otalPax   |                 |   | увоо                          | ti ngDate»        | ookingFr    | yBooki        | yBooki                                      | Booking   | ookingCh   | ate»   |  |  |
|                 | EventDate   |                 |   | ngPa                          | 30                | omTime>     | ngToTi<br>me» | ngGST<br>Amoun                              | ChargeE<br>xGST»                                    | arge»  |  |  |  |
|                 | EventName   |                 |   |                               |                   |             |               | t»  |   |  |  |  |  |
|                 | EventFacilityGroup  |                 | : «Tota   | alBookingsA                   | mount»            | 1           |               |   |   |  |  |  |  |
|                 | EventLevel  |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 |   |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 | EventStartTime  |                 |   |                               |                   |             |               |   |   |  |  |  |  |
|                 | EventStartTime<br>EventEndTime  |                 | g Char  | ges                           |                   |             |               |   |   |  |  |  |  |
|                 | EventStartTime<br>EventEndTime<br>EventSetupMode  |                 | g Char  | ges                           |                   |             |               | Qty   | Hours   | \$ per<br>hour   | Charges  |  |  |
|                 | EventStartTime<br>EventEndTime<br>EventSetupMode<br>EventPax  |                 | g Char  | ges<br>Name»                  |                   |             |               | Qty<br>«Other                               | Hours<br>«Other                                     | \$ per<br>hour<br>«OtherBo   | Charges<br>«OtherBo                                |  |  |
|                 | EventStartTime<br>EventEndTime<br>EventSetupMode<br>EventPax<br>EventArrivalTime  |                 | g Char;<br>esService                            | <b>ges</b><br>Name»           |                   |             |               | Qty<br>«Other<br>Bookin<br>gCharg           | Hours<br>«Other<br>Bookin<br>gCharg                 | \$ per<br>hour<br>«OtherBo<br>okingCha<br>rgesChar                   | Charges<br>«OtherBo<br>okingCha<br>rgesChar        |  |  |
|                 | EventStartTime<br>EventEndTime<br>EventSetupMode<br>EventPax<br>EventArrivalTime<br>EventGatesOpenTime  |                 | g Char  | <b>ges</b><br>Name»           |                   |             |               | Qty<br>«Other<br>Bookin<br>gCharg<br>esQty» | +Ours<br>«Other<br>Bookin<br>gCharg<br>esHour       | \$ per<br>hour<br>«OtherBo<br>okingCha<br>rgesChar<br>gePerHo        | Charges<br>«OtherBo<br>okingCha<br>rgesChar<br>ge» |  |  |
|                 | EventStartTime<br>EventEndTime<br>EventSetupMode<br>EventPax<br>EventArrivalTime<br>EventGatesOpenTime<br>EventTransportMode                    |                 | g Char  | ges<br>Name»<br>s: «TotalAdd  | itionalChargesA   | mount»      |               | Qty<br>«Other<br>Bookin<br>gCharg<br>esQty» | Hours<br>«Other<br>Bookin<br>gCharg<br>esHour<br>S» | \$ per<br>hour<br>«OtherBo<br>okingCha<br>rgesChar<br>gePerHo<br>ur» | Charges<br>«OtherBo<br>okingCha<br>rgesChar<br>ge» |  |  |
|                 | EventStartTime<br>EventEndTime<br>EventSetupMode<br>EventPax<br>EventArrivalTime<br>EventGatesOpenTime<br>EventTransportMode<br>EventFileNumber |                 | g Char  | ges<br>Name»<br>s: «TotalAdd  | itionalChargesA   | mount»      |               | Qty<br>«Other<br>Bookin<br>gCharg<br>esQty» | Hours<br>«Other<br>Bookin<br>gCharg<br>esHour<br>s» | \$ per<br>hour<br>«OtherBo<br>okingCha<br>rgesChar<br>gePerHo<br>ur» | Charges<br>«OtherBo<br>okingCha<br>rgesChar<br>ge» |  |  |

## **Event Details**

| Event Date  | Event Name                       | Event Facility | Event Level       | Start Time  | End Time        | Mode        |
|-------------|----------------------------------|----------------|-------------------|-------------|-----------------|-------------|
|             |                                  | Group          |                   |             |                 |             |
| 22 Oct 2015 | Regional<br>Swimming<br>Carnival | Carnival A     | School            | 08:00 AM    | 02:00 PM        | Long Course |
| Event Pax   | Arrival Time                     | Gates Open     | Transport Mode    | File Number | Event Total Pax |             |
| 1500        | 08:00 AM                         | 08:30 AM       | Bus + PV + Trains | 123456      | 1500            |             |



### **Apply Changes Button**

You can now select the 'Apply Changes' button which means you no longer need to close the booking to save the changes.

| Documents | Letter | Email | Booking<br>Access | Change<br>Log | Payment Schedule >> | Update and Pay | Apply Changes | Update | Close |  |
|-----------|--------|-------|-------------------|---------------|---------------------|----------------|---------------|--------|-------|--|
|           |        |       |                   |               |                     |                | -             |        |       |  |

### Instructions Field Changes

In the instructions field for a Facility Booking it now has a Countdown of characters remaining. Once you get to 255 characters you can no longer add any additional Characters in the instructions field.



![](_page_65_Picture_0.jpeg)

### Pax/Crowd Numbers

When making a booking, each line can now have a Pax/Crowd number entered. This is done by double-clicking on the Pax column in the booking screen and entering the number in.

| <b>B</b> .          |  |                                      |  | F                | acility Book          | ing 75                    |                 |                     |                        | x  |
|---------------------|--|--------------------------------------|--|------------------|-----------------------|---------------------------|-----------------|---------------------|------------------------|--|
| Da                  | ate Booked   | : Tue 20/                            | 10/2015  | Bool             | king ID 7             | 5                         | Ref#            | 115 to 1            | 48 inclus              | IVE  |
| Major Event         | C Casual Use                                       | Booking Name:                        | Basketball Tra   | ning             |                       |                           |                 |                     | C Fuel                 | Delay  |
| Event<br>Details    | <ul> <li>Client</li> </ul>                         | Client Id:<br>Name:                  | 2 New View Contact: N WESTON                           |                  |                       |                           |                 |                     |                        | ndate:   |
| Enquiry<br>Details  | <ul> <li>Confirmed</li> <li>C Tentative</li> </ul> | Method:<br>Instruction<br>Prime Usag | <ul> <li>Invoice Ac</li> <li>s:</li> <li>e:</li> </ul> | count () Cas     | h On Arrival<br>0/255 | Status: [<br>PO Number: [ | Perma           | ▼<br>nent Booking   | Booking                | Type:  |
| Facility Name       |  | Date Day                             | From Time  | To Time          | Attended Pax          | Duration (hrs)            | No. Periods     | \$ Per Period       | Charge (\$)            | Service Name 🔺   |
| Court 1             | 20/  | 10/2015 Tu                           | 06:00 AM   | 08:00 AM         |                       | 2                         | 8               | 15.00               | 120.00                 | Courts Hire  |
| Court 1             | 217  | 10/2015 We                           | 06:00 AM   | 08:00 AM         |                       | 2                         | 8               | 15.00               | 120.00                 | Courts Hire  |
| Court 1             | 23/  | 10/2015 Fr                           | 06:00 AM   | 08:00 AM         |                       | 2                         | 8               | 15.00               | 120.00                 | Courts Hire  |
| Court 1             | 26/  | 10/2015 Mo                           | 06:00 AM   | <b>D</b> Eacilit | ty Booking            | Pax Nu X                  | 8               | 15.00               | 120.00                 | Courts Hire  |
| Court 1             | 27/  | 10/2015 Tu                           | 06:00 AM   | -Sr Tucini       | ty booking            |                           | 8               | 15.00               | 120.00                 | Courts Hire  |
| Court 1             | 28/  | 10/2015 We                           | 06:00 AM   |                  |                       |                           | 8               | 15.00               | 120.00                 | Courts Hire  |
| Court 1             | 29/  | 10/2015 Th                           | 06:00 AM   | Enter F          | Pax: 30               |                           | 8               | 15.00               | 120.00                 | Courts Hire  |
|                     |  |                                      |  |                  |                       |                           |                 |                     |                        | ▶ <b></b>  |
| Total owing on this | booking line is \$                                 | 120.00                               | uhan Daahiraa  |                  | ок                    | Cancel                    | oply<br>efaults | Add Booking<br>Line | Cancel<br>Booking Line | Edit<br>Booking<br>Booking<br>Edit<br>Booking<br>Booking<br>Edit<br>Dif Peak Period<br>Dif Peak Period<br>Setup/Packdown |
| Date                | Am   | it I                                 | Service Name   | -                |                       | Qtu                       | Hours           | \$ Per Hi           | our Ch                 | arge (\$)  |

This can also be done from the Multi Edit Screen via the Edit Booking button as a fill down or individually.

| 8  |                    |                   | Edit Facility | y Booking | 75  |                  |                |                         |                                  |                              | x                             |
|--|--------------------|-------------------|---------------|-----------|-----|------------------|----------------|-------------------------|----------------------------------|------------------------------|-------------------------------|
| - Edit Facility Booking<br>Filters   |                    |                   |               | Date      |     |                  | - Time         |                         |                                  |                              |                               |
| Facility:     Set     From:     D     From:     VM on V Fri     Setup/Pack       To:     3NOV 2015     D     To:     To:     To:     Clear Filters |                    |                   |               |           |     |                  |                |                         |                                  |                              |                               |
| Edit Bookings  | Edit Produc        | ts/Services       |               |           |     |                  |                |                         |                                  |                              |                               |
|  |                    |                   |               |           |     |                  |                |                         | Ap                               | ply Override                 | Clear Fill Downs              |
| Change Facility  |                    |                   |               |           |     |                  |                | □ %                     | □ %                              | Γ %                          | Fill Down                     |
|  |                    | <b>v</b>          | D             |           |     |                  |                |                         |                                  |                              |                               |
| Facility Name  | Prime Usage        | Date              | From Time     | To Time   | Pax | Duration<br>hrs) | No.<br>Periods | Charge Per<br>Hour (\$) | Charge Per<br>Period (\$)        | Charge (\$)                  | Service Name                  |
| Court 1  | None               | Tue 20/10/2015    | 06:00 AM      | 08:00 AM  | 30  | 2.00             | 8              | 55.00                   | 13.75                            | 110.00                       | Courts Hire                   |
| Court 1  | None               | Thu 22/10/2015    | 06:00 AM      | 08:00 AM  | U   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Eri 23/10/2015    | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Mon 26/10/2015    | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Tue 27/10/2015    | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Wed 28/10/2015    | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Thu 29/10/2015    | 06:00 AM      | 08:00 AM  | n   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Fri 30/10/2015    | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Mon 2/11/2015     | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| Court 1  | None               | Tue 3/11/2015     | 06:00 AM      | 08:00 AM  | 0   | 2.00             | 8              | 60.00                   | 15.00                            | 120.00                       | Courts Hire                   |
| 4  |                    |                   |               |           |     |                  |                |                         |                                  |                              | *                             |
| Select All Select Highl  | ighted Only Cancel | Booking Split Boo | kings C       | alendar   |     |                  |                | E Fa                    | acility has be<br>acility has be | een allocate<br>een selected | d a change<br>I for Fill Down |
|  |                    |                   |               |           |     |                  |                | Save                    | Delete                           | Clear 0                      | Clone                         |

If selected, the Pax can also be adjusted when the booking is attended.

![](_page_66_Picture_0.jpeg)

To turn this on go to Admin> Site> Other Site Parameters (Or Set Up Locations for multi location sites)> Facility tab> Prompt for Pax on Attend

| C Other Site Paramete  | ers   | x        |
|--|---|----------|
| Details         Stock Stores         Tills         Templates         Appoint's / Cards           Access Points         ClassWeb         Active Carrot         Security         SMS | Memberships Visit Passes Class Types<br>Facility Visits Dashboard | Sessions |
| Display warning on booking if client owes money on issued invoices Default to 7 day view in Facility Bookings  | Use Time Dropdowns on Vacancy Search screen                       |          |
| Validate Product/Service(s) for Facility  Frompt For Pax on Attend  Show Booking Duration in Hours (instead of Minutes)  | ● AM/PM ○ 24-Hour   |          |

When the facility booking is attended from the booking screen the following prompt occurs.

| 8  |   | F  | Facility Bookir                         | ig 75                               |  |  |  |   | x                                 |
|--|---|--|---|-------------------------------------|--|--|--|---|-----------------------------------|
| Date Bool  | ked: Tue 20/10/20   | 15 Boo   | king ID 75                              |                                     | Ref#   | 115 to 1   | 48 inclusi   | Ye  |                                   |
| Extensions<br>Major Event<br>Event<br>Details<br>Enquiry<br>Details<br>Booking Det<br>C Casual U<br>C Customer<br>© Cient<br>© Cient<br>© Constructioner<br>© Cons | aats Booking Name: Basket<br>Client Id: 2<br>Name: TEST<br>d Method: • Inv<br>Instructions:<br>Prime Usage:   | ball Training  | View Contact:<br>sh On Arrival<br>0/255 | N WESTON<br>Status:  <br>PO Number: | ☐ Perma  | ▼<br>■   | C End<br>C Perio<br>Booking  | Date:   | D<br>V<br>ails                    |
| Facility Name  | Date Day From   | Time To Time   | Attended Pax                            | Duration (hrs)                      | No. Periods  | \$ Per Period  | Charge (\$)  | Service Name  |                                   |
| Court  | 20/10/2015         Tw         08/00           21/10/2015         We         06:00           22/10/2015         Th         06:00           23/10/2015         Fn         06:00           28/10/2015         Mo         06:00           28/10/2015         Mo         06:00           28/10/2015         Tu         06:00           28/10/2015         Tu         06:00           28/10/2015         Tu         06:00           28/10/2015         Tu         06:00           29/10/2015         Tu         06:00           29/10/2015         Th         06:00           29/10/2015         Tu         06:00           29/10/2015         Th         06:00           29/10/2015         Th         06:00           29/10/2015         Th         06:00           29/10/2015         Th         06:00 | AM         08:00 AM           AM         08:00 AM           AM         Second AM | Book og Pax N                           | 2.00<br>2.00<br>Nu ×                | 8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8 | 13.75<br>15.00<br>15.00<br>15.00<br>15.00<br>15.00<br>15.00<br>15.00 | 110.00<br>120.00<br>120.00<br>120.00<br>120.00<br>120.00<br>120.00<br>120.00<br>120.00 | Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire |                                   |
| Total owing on this booking lin  | ie is \$110.00  |  |   |                                     | Apply<br>Defaults  | Add Booking  | Cancel<br>Booking Line   | Edit<br>Booking   | ' <mark>eriod</mark><br>ak Period |

When attending from the Visual Booking Scheduler a prompt will also occur.

|                        | 5  |                     |                 | ×         |          |       |             |
|------------------------|----|---------------------|-----------------|-----------|----------|-------|-------------|
| 20/10/2015 21/1        | 0/ | Double-Click Pax va | alue to Change: |           |          |       | Fill Down   |
| RTS CLUB,Basketbal RTS | <  | Facility Name       | Date            | From Time | To Time  | Pax   | <b>_</b>    |
| RTS CLUB,Basketbal RTS | C  | Court 1             | Tue 20/10/2015  | 06:00 AM  | 08:00 AM | 30    |             |
| RTS CLUB,Basketbal RTS | <  |                     |                 |           |          |       |             |
| RTS CLUB,Basketbal RTS | ۲  |                     |                 |           |          |       |             |
| RTS CLUB,Basketbal RTS | C  |                     |                 |           |          |       |             |
| RTS CLUB,Basketbal RTS | C  |                     |                 |           |          |       |             |
| RTS CLUB,Basketbal RTS | <  |                     |                 |           |          |       |             |
| RTS CLUB,Basketbal RTS | C  |                     |                 |           |          |       |             |
|                        |    |                     |                 |           |          |       |             |
|                        |    |                     |                 |           |          |       |             |
|                        |    | •                   | 1               |           |          |       | •           |
|                        |    |                     |                 | Save      | Delete   | Clear | Clone Close |

![](_page_67_Picture_0.jpeg)

The Bookings by Date report has a column for Pax numbers with a total.

#### Demo Site

|            | Bookings By Date Report<br>From : 20/10/2015 To : 20/10/2015 |          |            |     |               |                     |           |                                |               |              |  |  |  |
|------------|--|----------|------------|-----|---------------|---------------------|-----------|--------------------------------|---------------|--------------|--|--|--|
| Date       | From Time  | To Time  | Hours Used | Pax | Facility Name | Name                | Status    | Booking<br>Name                | Booking<br>Id | Instructions |  |  |  |
| 20/10/2015 | 06:00 AM   | 08:00 AM | 2          | 30  | Court 1       | TEST SPORTS<br>CLUB | Confirmed | Basketball<br>Training         | 75            |              |  |  |  |
| 20/10/2015 | 01:00 PM   | 03:00 PM | 2          | 0   | Court 2       | TEST SCHOOL         | Confirmed | School<br>Sport<br>Volley Ball | 76            |              |  |  |  |
| 20/10/2015 | 04:00 PM   | 05:00 PM | 1          | 0   | Court 1       | TEST SCHOOL         | Confirmed | Fitness<br>Test                | 78            |              |  |  |  |
| 20/10/2015 | 07:00 PM   | 09:00 PM | 2          | 0   | Stadium       | TEST SPORTS<br>CLUB | Confirmed | Basketball<br>Training         | 77            |              |  |  |  |
| TOTAL:     |  |          | 7          | 30  |               |                     |           |                                |               |              |  |  |  |

\* Print contact details and booking instructions.

\* Att refers to 'Facility Booking Attended'

\* Bookings only.

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

When you generate a confirmation letter for the booking, the Pax number is shown under the Pax column as shown below. The Booking confirmation template will need to be edited to include this.

Dear N,

Client Credit on Account: \$0.00 Client Credit Used for this booking: \$0.00

Please find below a confirmation of your booking made with Location 1.

#### **Booking particulars**

| Booking Reference Number | 115 to 148 inclusive |
|--------------------------|----------------------|
| Event Description        | Basketball Training  |
| Booking Status           | Confirmed            |
| Payment Arrangement      | Invoice on Account   |
| Specified instructions   |                      |
| Phone number on file     |                      |

\_\_\_\_\_

#### **Booking Details**

| -               |     |             |          |          |     |  |  |  |  |  |
|-----------------|-----|-------------|----------|----------|-----|--|--|--|--|--|
| Facility Booked | Eax | Date        | From     | То       | GS  |  |  |  |  |  |
| Court 1         | 30  | 20 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| Court 1         | 60  | 21 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| Court 1         | 80  | 22 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| Court 1         | 75  | 23 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| Court 1         | 20  | 26 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| Court 1         | 0   | 27 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| Court 1         | 0   | 28 Oct 2015 | 06:00 AM | 08:00 AM | \$1 |  |  |  |  |  |
| T-+-I DI 6700.0 | _   |             |          |          |     |  |  |  |  |  |

Total Bookings: \$790.0

![](_page_68_Picture_0.jpeg)

### Booking Duration in Hours instead on Minutes

You can now choose to have the booking duration showing in hours instead of minutes.

| Facility Booking 75   |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
|-----------------------|----------------|------------|-----------------|---------------------|------------------------|----------------|--------------|-----------------|------------------|--------------|------------------|--|
| Da                    | te Booke       | d: Wed :   | 21/10/201       | 5 Boo               | king ID 75             |                | Ref#         | 115 to 1        | 48 inclus        | ive          |                  |  |
| Extensions - Bo       | oking Details  |            |                 |                     |                        |                |              |                 | n 🗖 Multi        | iple Booking | s                |  |
| Major Event           | Casual Use     | Booking Na | me: Basketball  | Training            |                        |                |              |                 |                  |              |                  |  |
| - Current C           | Customer       | Clien      | tld: 2          | New                 | View Contact:          | N WESTON       |              | •               | C End            | d Date:      | D                |  |
| Details               | • Cileni       | Na         | me: TEST SPC    | IRTS CLUB           |                        | ,              |              |                 | C Per            | ind:         | _                |  |
|                       |                | Met        | not 💽 Invoice   | Account C Ca        | sh On Arrival          | Statue:        |              |                 |                  |              |                  |  |
| Enquiry G             | Confirmed      |            |                 |                     |                        |                |              |                 | Booking          | Туре:        | <b>v</b>         |  |
|                       | Tentative      | Instru     | ctions:         |                     | 0/255                  | P0 Number:     | _            |                 |                  |              | Manu Datala      |  |
|                       |                | Prime l    | Jsage:          |                     | -                      |                | Perma        | nent Booking    |                  |              | VIEW Details     |  |
| Eacilitu Name         |                | Date       | Dau Erom Tim    | e ToTime            | Attended Pay           | Duration (brs) | No. Periode  | & Per Period    | Charge (\$)      | Service Nam  |                  |  |
| Court 1               | 20             | /10/2015   | Tu 06:00 AM     | 08:00 AM            | ✓ <u>30</u>            | 2.00           | 8            | 13.75           | 110.00           | Courts Hire  | -                |  |
| *Court 1              | 21             | /10/2015   | We 06:00 AM     | 08:00 AM            |                        | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| Court 1               | 22             | /10/2015   | Th 06:00 AM     | 08:00 AM            |                        | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| Court 1               | 23             | /10/2015   | Fr 06:00 AM     | 08:00 AM            |                        | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| Court 1               | 26             | /10/2015   | Mo 06:00 AM     | 08:00 AM            |                        | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| Court 1               | 27             | /10/2015   | Tu 06:00 AM     | 08:00 AM            |                        | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| Court 1               | 28             | /10/2015   | We 06:00 AM     | 08:00 AM            |                        | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| Lourt 1               | 29             | /10/2015   | Th US:UU AM     | U8:00 AM            | $+$ $H$ $+$ $\ddot{h}$ | 2.00           | 8            | 15.00           | 120.00           | Courts Hire  |                  |  |
| •                     |                |            |                 |                     |                        | L              | J            |                 |                  |              | •                |  |
| Total owing on this b | ooking line is | \$0.00     |                 | Setup/F             | ackdown                | 1              | Applu [      | Add Booking     | Cancel           | Edit         | Peak Period      |  |
|                       |                |            |                 | Before:             | After                  | Apply          | Defaults     | Line            | Booking Line     | e Booking    | Uff Peak Period  |  |
| -Adjustments -        |                |            | - Other Booki   | ing Charge Det      | ails                   |                |              |                 |                  |              | - зециритаскиожи |  |
| Date                  | A              | mt         | Service Nan     |                     |                        | Ohu            | Hours        | \$ Per Hr       | ur Ck            | arce (\$)    |                  |  |
|                       |                |            | Jervice Ivan    | 10                  |                        | 49             | nours        |                 | nur j or         | ialge (¢)    | -                |  |
|                       |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
|                       |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
| 1                     | 1              |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
| View Detai            | ils            | Add        |                 |                     |                        |                |              |                 |                  |              |                  |  |
| Courts )              | Acceste        | C1-1       | * - Price was   | Add Service         | e Add Produc           | t Edit Proc    | duct/Service | Selected B      | ooking Total \$: | 110.00       | =                |  |
| Cieux                 | Associa        | Stan       | ovemdden        |                     |                        |                |              | -               |                  | ,            |                  |  |
| Credit                | Amount Rei     | mai        | Tran ID         | Payment Date        | Amount, \$             |                | Gr           | oup Booking Tot | al: \$           | 4170.00      |                  |  |
|                       |                |            | 161             | 20 Oct 2015         | 110.00                 |                |              | Total Pa        | id: \$           | 110.00       |                  |  |
|                       |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
|                       |                |            |                 |                     |                        |                |              | Uutstandir      | g:\$             | 4060.00      |                  |  |
|                       |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
|                       |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
|                       |                |            |                 |                     |                        |                |              |                 |                  |              |                  |  |
| Documents             | Letter         | Email      | Bookir<br>Acces | ng Change<br>ss Log | Payment S              | chedule >>     | Update and P | ay Apply Ch     | anges Up         | odate (      | Close            |  |

This change can be made by going to Admin> Site> Other Site Parameters (Setup Locations for multi location)> Facility Tab> Show Booking Duration in Hours

| 0  | ters  |  |  |  |  |  |  |  |  |  |  |
|--|---|--|--|--|--|--|--|--|--|--|--|
| Details Stock Stores Tills<br>Access Points ClassWeb Active Carrot   | Templates Appoint's / Cards                   | Memberships         Visit Passes         Class Types           Facility         Visits Dashboard |  |  |  |  |  |  |  |  |  |
| ☐ Display warning on booking if client owes money<br>承 Default to 7 day view in Facility Bookings  | 🕱 Use Time Dropdowns on Vacancy Search screen |  |  |  |  |  |  |  |  |  |  |
| Validate Product/Service(s) for Facility  Product Fac Product Attended   | AM/PM      24-Hour                            |  |  |  |  |  |  |  |  |  |  |
| IX Prompt For Pax on Attend           IX Show Booking Duration in Hours (instead of Minutes)         IX Show Booking Duration in Hours (instead of Minut |   |  |  |  |  |  |  |  |  |  |  |

![](_page_69_Picture_0.jpeg)

### Pre/Post Changes

Pre/Post has now been renamed to Setup/Packdown. Users can now select booking lines and apply defaults or manually enter a Setup/Pack down value.

| 8                  |  |                                       |                       | F                   | Facility Book         | ing                     |                   |                        |                        |                             | x  |
|--------------------|--|---------------------------------------|-----------------------|---------------------|-----------------------|-------------------------|-------------------|------------------------|------------------------|-----------------------------|--|
| - Extensions -     | Date Booked  | I: Tue 20/                            | 10/2015               | Book                | ing ID                |                         | Ref#              |                        | E Multi                | inle Rooking                |  |
| Major Event        | C Casual Use<br>C Customer<br>C Client             | Booking Name:<br>Client Id:<br>Name:  | Fitness Test          | New V               | 'iew Contact:         | JON                     |                   | •                      | C End                  | iDate:                      | D  |
| Enquiry<br>Details | <ul> <li>Confirmed</li> <li>C Tentative</li> </ul> | Method:<br>Instruction<br>Prime Usage | Invoice A             | ccount () Cash      | 0n Arrival<br>0/255   | Status:  <br>PO Number: | - Perma           | ▼<br>nent Booking      | © Per<br>Booking       | Type:                       | <b>▼</b><br>√iew Details                         |
| Facility Name      | 20/  | Date Day<br>/10/2015 Tu               | From Time<br>04:00 PM | To Time<br>05:00 PM | Attended Pax          | Duration (hrs)          | No. Periods<br>4  | \$ Per Period<br>13.75 | Charge (\$)<br>55.00   | Service Name<br>Courts Hire |  |
| 4                  |  |                                       |                       |                     |                       |                         |                   |                        |                        |                             | ►.   |
| Total owing on     | this booking line is                               | \$55.00                               | ther Booking          | Before: 1           | ckdown<br>5 After: 15 | Apply                   | Apply<br>Defaults | Add Booking<br>Line    | Delete<br>Booking Line | e Edit<br>Booking           | Peak Period<br>Off Peak Period<br>Setup/Packdown |

There is a new area in Facility Setup to set default Setup/Pack down durations for each Facility if required. This is set up in Admin> Facility> Setup Facilities.

| 8  | Add/Modify Facility Dialog   | x |
|--|--|---|
| Facility Code: Court 1 (Max<br>Description: Court 1  | 20 Chars)<br>Prime Usage:  |   |
| Duration: 15 mins  | Group Update Charges   |   |
| Peak Facility Service - Casual         Charge/ 15 mins:       15         Charge/Hour:       60         Code:       \$1006         Description:       Courts Hire   | Peak Facility Service - Client         Charge/15 mins:       15       Charge/15 mins:       13.75         Charge/Hour:       60       Charge/Hour:       55         Code:       S1006        Description:       Courts Hire  |   |
| Off Peak Facility Service - Casual<br>Charge/15 mins: 15<br>Charge/Hour: 60<br>Code: S1006<br>Description: Courts Hire   | Off Peak Facility Service - Member         Charge/15 mins:       15         Charge/Hour:       60         Code:       \$1006         Description:       Courts Hire    Off Peak Facility Service - Client Charge/15 mins:          13.75         Charge/Hour:       55         Code:       \$1006         Description:       Courts Hire |   |
| Can have a staff member booked with Facility Must have a staff member booked with Facility Staff Service Use Related Staff Code: Description: Charge/Hour: \$ 0.00 | Charge Overrides         Setup charge overrides that can be applied to this facilities bookings         Setup/Packdown Defaults         Setup:       15         Packdown:       15         Save       Clone  |   |

![](_page_70_Picture_0.jpeg)

### Edit Quantity of Products and Services per Booking Line

You can now edit the quantity and cost of Products and Services by booking line. You can use the 'Edit Product/Service' button to update the Quantity and Cost without the need to delete and re add.

| 5           |                      |                      |                            |                             | F             | acility Booking | 75                   |                      |  | x                              |
|-------------|----------------------|----------------------|----------------------------|-----------------------------|---------------|-----------------|----------------------|----------------------|--|--------------------------------|
| - Extone    | Date                 | Booked: W            | /ed 21/                    | 10/2015                     | Book          | ing ID 75       | Ref#                 | 115 to 148 i         | nclusive                                 |                                |
| □ Majo      | or Event C C         | asual Use Bool       | king Name:                 | Basketball Tra              | aining        |                 |                      | '                    | C 5 10 1                                 |                                |
| Eve<br>Det  | rent CI              | lient                | Client Id:<br>Name:        | 2<br>TEST SPORT             | S CLUB        | /iew Contact: N | WESTON               | -                    |  |                                |
| Enq         | quiry C              | onfirmed             | Method:                    | Invoice Ad                  | count () Cast | n On Arrival    | Status:              | •                    | Booking Type:                            |                                |
| Det         | tails OT             | entative             | Instruction<br>Prime Usage | s:  <br>e:                  |               | 🖻 Add produ     | ct/service to booki  | - 🗆 X                | View De                                  | tails                          |
|             |                      |                      | In In                      |                             |               |                 | Facility Hire        |                      |  |                                |
| Faci<br>Cou | uity Name<br>urt 1   | 20/10/201            | 5 Tu                       | From Lime<br>06:00 AM       | 08:00 AM      | Qua             | ntity: 20            | -                    | pe (\$) Service Name<br>1.00 Courts Hire |                                |
|             | urt 1                | 21/10/201            | 5 We<br>5 Th               | 06:00 AM                    | 08:00 AM      | Original Unit   | Cost: \$ 0.00        |                      | 1.00 Courts Hire                         |                                |
| Cou         | urci<br>urc1<br>urc1 | 26/10/201            | 5 Fr<br>5 Mo               | 06:00 AM<br>06:00 AM        | 08:00 AM      | Override Unit I | Cost: \$ 5.00        |                      | 0.00 Courts Hire                         |                                |
| Cou         | urt1<br>urt1         | 28/10/201            | 5 We<br>5 Th               | 06:00 AM                    | 08:00 AM      | T               | otal: \$  100.00     |                      | 1.00 Courts Hire                         |                                |
|             |                      |                      | - 1-                       | 00.00                       | - Solum /P-   |                 | 🗸 OK 📉 🗙 Cano        | el                   |  |                                |
| Total ow    | wing on this book    | ting line is \$220.0 | )0                         |                             | Before:       |                 |                      |                      | incel Edit Off Peak<br>Booking Setun     | eriod<br>ak Period<br>Packdown |
|             | Adjustments —        | Ant                  |                            | ther Booking                | Charge Deta   |                 |                      | 1 AD 11              |  |                                |
|             | Date                 | And                  |                            | Facility Hire               |               |                 | 20.00                | ¢ Por Hour           | 100.00                                   |                                |
|             |                      |                      |                            |                             |               |                 |                      |                      |  |                                |
|             | View Details         | Add                  |                            | • D'                        |               |                 |                      |                      |  |                                |
|             | Credit A:            | ssets Staf           |                            | • - Frice was<br>overridden | Add Service   | Add Product     | Edit Product/Service | Selected Booking     | Total \$: 220.00                         |                                |
|             | Credit A             | mount Remai          | TI TI                      | ran ID Pa                   | vment Date    | Amount. \$      | Grou                 | up Booking Total: \$ | 4170.00                                  |                                |

![](_page_71_Picture_0.jpeg)

### Multi Edit Screen now allocates Products and Services to Bookings in Bulk

By selecting the bookings, you can then use the Edit Products and Services tab to either add or remove the Products/Services.

To bulk add Products or Services, select the booking lines to add them to, select 'Add Service' or 'Add Product', find your Product/Service and 'select'.

| 5        |                   |                           |                      | Edit Facilit | y Booking | 75   |          |         |            |                |                 | ×                | ĸ    |                   |                        | vacancies             | Galer          | luai        |
|----------|-------------------|---------------------------|----------------------|--------------|-----------|------|----------|---------|------------|----------------|-----------------|------------------|------|-------------------|------------------------|-----------------------|----------------|-------------|
| -Edit Fa | cility Booking    |                           |                      |              |           |      |          |         |            |                |                 |                  |      |                   |                        |                       |                |             |
| Filters  |                   |                           |                      |              |           |      |          |         |            |                |                 |                  |      |                   |                        | Booking Details       | New Bo         | poking      |
|          |                   |                           |                      | r            | Date      |      |          | Time    |            | TT Me          |                 | Display          |      |                   |                        |                       |                |             |
| Facility | e                 |                           |                      | Set          | From      |      |          | From:   |            | - 10 MO        |                 | E Setup/Pack     |      |                   |                        |                       |                |             |
|          |                   |                           |                      |              | Trans 1   |      |          |         |            | . I u iu       | a  v sat        | Down             |      |                   | C 2                    | Grids 🔲 7 Day         | . View         |             |
|          |                   |                           |                      |              | To:       |      | D        | To:     |            | - 10 We        | d  ✔ Sun        | Class Eibers     |      |                   |                        | here Basking Name Oak |                |             |
|          | 1                 |                           |                      |              | 1         |      | -        |         | 1          | J <b>∠</b> Thi | i   <b>v</b> Al | Ciber Fillers    |      |                   |                        | now Booking Name Only |                |             |
|          |                   |                           |                      |              |           |      |          |         |            |                |                 |                  |      |                   |                        |                       |                |             |
|          | Edit Bookings     | Edit Produ                | icts/Services        |              |           |      |          |         |            |                |                 |                  |      | 8                 | S                      | earch                 |                | ×           |
| Ber      | Service Name      |                           | Qty Remove           | Ser          | /ice Name |      |          |         |            | Qty Charge     | (\$)            | Add Constant     | Ш    | Code Descri       | otion                  | Amount, \$ AltF       | trice, \$ On H | fype        |
| Pro      | ducts             |                           | 1 40 1               |              |           |      |          |         | /          |                |                 | Add Service      | Ш    | S1000 Casual      | Adult Swim             | 6.00                  | 9              | 6           |
| /Se      | rvices            |                           |                      |              |           |      |          |         |            |                |                 | Add Product      | Ш    | S1001 Casual      | Child Swim             | 4.00                  |                | i l         |
|          |                   |                           |                      |              |           |      |          |         |            |                |                 |                  | Ш    | S1003 Lasual      | Heath Llub             | 20.00                 |                | <u> </u>    |
|          |                   |                           |                      |              |           |      |          |         |            |                |                 |                  |      | S1005 Eacity      | Hire                   | 0.00                  |                |             |
|          |                   |                           |                      |              | -         | 1    | 1        |         | 1          | 1              | 1               |                  | -11  | STUDE LOURS       | Hite                   | 0.00                  |                |             |
|          | Escillu Mama      | Prime Hanne               | Data                 | From Time    | To Time   | Daw. | Duration | No.     | Charge Per | Charge Per     | Charge (t)      | Convine Marrie   | 4    | S1010 Birthda     | y Party Deposit        | 50.00                 | 9              | 5           |
|          | Facility realitie | Fillie Usage              | Date                 | FIGHTTIME    | To time   | r dx | (hrs)    | Periods | Hour (\$)  | Period (\$)    | Charge (\$)     | Service maine    |      | S1011 Birthda     | y Party Deposit Refund | -50.00                | 9              | 6           |
|          | Court 1           | None                      | Wed 21/10/2015       | 06:00 AM     | 08 00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | S1012 Catere      | d Party Per Head       | 25.00                 | -              | ò I         |
|          | Court 1           | None                      | Thu 22/10/2015       | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | S1015 Gymna       | stic Registration Fee  | 1,000,00              |                | i l         |
|          | Court 1           | None                      | Fri 23/10/2015       | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | C1017 Dond        | 1-6 d                  | 1,000.00              |                | 2           |
|          | Court 1           | None                      | Mon 26/10/2015       | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | S1017 Bond P      | nerunu                 | 1,000.00              |                | ŝ           |
|          | Court 1           | None                      | Tue 27/10/2015       | 06:00 AM     | MA 00.80  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | S1019 Credit      | Tard Surcharge         | 0.00                  |                | á l         |
|          | Court 1           | None                      | Wed 28/10/2015       | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | o loto            | ouro ouronalgo         | 0.00                  |                | <u></u>     |
|          | Court 1           | None                      | Thu 29/10/2015       | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | Call Dans 1       |                        |                       |                |             |
|          | Court 1           | None                      | Fri 30/10/2015       | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      |                   |                        | Showing Page: 1 of 2  | . Total R      | ecords : 21 |
|          | Court 1           | None                      | Mon 2/11/2015        | 06:00 AM     | 08.00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | Search by         |                        |                       |                |             |
|          | Court 1           | None                      | Tue 3/11/2015        | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | C //              |                        |                       |                | Search      |
|          | Court 1           | None                      | Wed 4/11/2015        | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | C SI Bar          | code:                  |                       |                | -           |
| <b>Z</b> | Court 1           | None                      | Thu 5/11/2015        | 06:00 AM     | MA 00:90  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      | - 11 | C Broduct         |                        |                       |                |             |
|          | Court 1           | None                      | Fri 6/11/2015        | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | G Sequipe Descri  | Starting               |                       |                |             |
|          | Court 1           | None                      | Mon 9/11/2015        | 06:00 AM     | 08:00 AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | te seigice bosci  | C Containing           |                       |                |             |
| <b>_</b> | Lourt 1           | None                      | Tue 10/11/2015       | U6:00 AM     | UR UD AM  | U    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | C MemType         |                        |                       |                |             |
|          | Louit 1           | None                      | Wed 11/11/2015       | 06:00 AM     | MA DUSU   | U    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Lourts Hire      |      | C Visit Pass Supp | nier: (Al Suppliers)   |                       |                | 1           |
| <u>≚</u> | Court 1           | None                      | F: 10.012/11/2015    | 05:00 AM     | UCUU AM   | 0    | 2.00     | 0       | 60.00      | 15.00          | 120.00          | Lourts rfire     |      |                   | 1                      |                       |                | Select      |
|          | Court 1           | None                      | PR 13/11/2015        | 05:00 AM     | US:UU AM  | 0    | 2.00     | 8       | 60.00      | 15.00          | 120.00          | Courts Hire      |      |                   | o                      |                       |                |             |
|          | Court 1           | None                      | Tue 17/11/2015       | 06.00 AM     | 06.00 AM  | 0    | 2.00     | 0       | 60.00      | 15.00          | 120.00          | Courts Hire      |      | L'olumps          | Lost \$:   equals      | - I                   |                |             |
|          | Court 1           | None                      | 106 17/11/2015       | 00.00 AM     | 00.00 AM  | 0    | 2.00     | 0       | 60.00      | 15.00          | 120.00          | Courte Hire      | 1    |                   |                        |                       |                |             |
|          | Coart             | INOID                     | Wed 10/11/2015       | 100.00744    | 100.00 MM | 10   | 12.00    | 10      | 100.00     | 113.00         | 1120.00         | Cours The        |      | -                 |                        |                       |                | Cancel      |
|          |                   | r                         |                      |              |           |      |          |         |            | acilitu har h  | aan allocat     | ed a change      |      |                   |                        |                       |                |             |
| N Sele   | Selec             | ct Highlighted Only Cance | el Booking Split Boo | kings (      | Calendar  |      |          |         | E F        | acility has b  | een selecte     | ed for Fill Down |      |                   |                        |                       |                |             |
|          |                   |                           |                      |              |           |      |          |         |            |                |                 | -L III           | T.   |                   |                        |                       |                |             |
|          |                   |                           |                      |              |           |      |          |         |            | TI             |                 | <b>*</b>         |      |                   |                        |                       |                |             |
|          |                   |                           |                      |              |           |      |          |         | -          |                | ~               |                  |      |                   |                        |                       |                |             |
|          |                   |                           |                      |              |           |      |          | _       | Save       | Delete         | Clear           | Close Close      |      |                   |                        |                       |                |             |
|          |                   |                           | 1                    |              |           |      |          |         |            |                |                 |                  | _    | 1                 |                        |                       |                |             |

Enter the quantity and cost and select OK.

Once you have finished ensure you save to apply the additional Products/Services.

To remove the Products/Services, filter the booking lines as required and go to the Edit Products/Services Tab. Select the Products/Services to remove and select the red cross. Select the 'Save' button to save the removal of the Products/Services.


| 8                                     |                  |                   | Edit Facility | Booking              | 75  |                   |                |                         |                                  |                            | ×  |
|---------------------------------------|------------------|-------------------|---------------|----------------------|-----|-------------------|----------------|-------------------------|----------------------------------|----------------------------|--|
| -Edit Facility Booking                |                  |                   |               |                      |     |                   |                |                         |                                  |                            |  |
| - Filters                             |                  |                   |               |                      |     |                   |                |                         |                                  |                            |  |
| Facility:                             |                  |                   | Set           | From: To:            |     | D                 | From:          |                         | Mor<br>V Tue<br>V Wer            | Fri<br>Sat<br>Sun<br>All   | Display<br>Setup/Pack<br>Down<br>Clear Filters |
| · · · · · · · · · · · · · · · · · · · |                  |                   |               |                      |     |                   |                |                         |                                  |                            |  |
| E dit Bookings                        | Edit Product     | s/Services        |               |                      |     |                   |                |                         |                                  |                            |  |
| Remove Service Name                   | 1                | Dty Bemove        | Servic        | e Name               |     |                   |                | 1                       | Rtv Charge I                     | (\$1                       |  |
| Products Eacility Hire                |                  | 990 No            | X             | in the second second |     |                   |                |                         | aty   onlarger                   | <u></u>                    | Add Service                                    |
| /Services                             |                  |                   |               |                      |     |                   |                |                         |                                  |                            | Add Product                                    |
|                                       |                  |                   |               |                      |     |                   |                |                         |                                  |                            |  |
|                                       |                  |                   |               |                      |     |                   |                |                         |                                  |                            |  |
|                                       |                  |                   |               |                      |     |                   |                |                         |                                  |                            |  |
| Facility Name                         | Prime Usage      | Date              | From Time     | To Time              | Pax | Duration<br>(hrs) | No.<br>Periods | Charge Per<br>Hour (\$) | Charge Per<br>Period (\$)        | Charge (\$)                | Service Name                                   |
| Court 1                               | None             | Wed 21/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Thu 22/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Fri 23/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Mon 26/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Tue 27/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Wed 28/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Thu 29/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Fri 30/10/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Mon 2/11/2015     | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Tue 3/11/2015     | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Wed 4/11/2015     | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Thu 5/11/2015     | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Fri 6/11/2015     | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Mon 9/11/2015     | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Tue 10/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Wed 11/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Thu 12/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Fri 13/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Mon 16/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Tue 17/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire                                    |
| Court 1                               | None             | Wed 18/11/2015    | 06:00 AM      | 08:00 AM             | 0   | 2.00              | 8              | 60.00                   | 15.00                            | 120.00                     | Courts Hire 🗸                                  |
|                                       |                  |                   |               |                      |     |                   |                |                         |                                  |                            | •  |
| Select All Select Highlight           | ed Only Cancel B | ooking Split Book | ings Ca       | lendar               |     |                   |                | Fa<br>Fa                | icility has be<br>icility has be | en allocate<br>en selecteo | d a change<br>I for Fill Down                  |
|                                       |                  |                   |               |                      |     |                   | :              | Save                    | Delete                           | Clear (                    | K Done Close                                   |

# **Booking Letter Changes**

When in a Facility booking, the letter button has moved when launching a confirmation letter (or pro forma invoice). Please see the change below.

| 8                |                            |                 |          |                   | I             | Facility B      | ookir   | ng 75          |              |                 |                  |               | ×                                   |
|------------------|----------------------------|-----------------|----------|-------------------|---------------|-----------------|---------|----------------|--------------|-----------------|------------------|---------------|-------------------------------------|
|                  | Date Boo                   | ked: Tue        | 20/1     | 0/2015            | Boo           | king ID         | 75      |                | Ref#         | 115 to 1        | 48 inclus        | ive           |                                     |
| Extensions -     | Booking De                 | tails Booking N | lame:    | Basketball Tra    | aining        |                 |         |                |              |                 | Mult             | iple Bookings |                                     |
| Major Even       | t C Casuard                | f Clie          | valle.   | 2                 |               | View   Cor      | tact    | NUVESTON       |              |                 | C End            | d Date:       |                                     |
| Event<br>Details | <ul> <li>Client</li> </ul> | Cile<br>N       | lame:    | TEST SPORT        | S CLUB        | 1600            | NGOL.   | INWESTON       |              | <u> </u>        | C Per            | ind:          |                                     |
| Esquiru          | I @ Confirme               | d Me            | ethod:   | Invoice Ad        | count 🔿 Ca    | sh On Arriva    | I       | Status:        |              | -               | Booking          | Tupe          |                                     |
| Details          | C Tentative                | e Instr         | ructions | :                 |               | 0/2             | 55      | PO Number:     |              |                 | booking          | a rype.       |                                     |
|                  |                            | Prime           | Usage    | :                 |               | •               |         |                | Permai       | nent Booking    |                  |               | /iew Details                        |
| Facility Nar     | ne                         | Date            | Day      | From Time         | To Time       | Attended        | Pax     | Duration (hrs) | No. Periods  | \$ Per Period   | Charge (\$)      | Service Name  | <b></b>                             |
| Court 1          |                            | 20/10/2015      | Tu       | 06:00 AM          | 08:00 AM      |                 | 30      | 2.00           | 8            | 13.75           | 110.00           | Courts Hire   |                                     |
| Lourt 1          |                            | 21/10/2015      | We       | 06:00 AM          | 08:00 AM      |                 | 0       | 2.00           | 8            | 15.00           | 120.00           | Courts Hire   |                                     |
| Court 1          |                            | 23/10/2015      | Fr       | 06:00 AM          | 08:00 AM      |                 | 0       | 2.00           | 8            | 15.00           | 120.00           | Courts Hire   |                                     |
| Court 1          |                            | 26/10/2015      | Mo       | 06:00 AM          | 08:00 AM      |                 | Ő       | 2.00           | 8            | 15.00           | 120.00           | Courts Hire   |                                     |
| Court 1          |                            | 27/10/2015      | Tu       | 06:00 AM          | 08:00 AM      |                 | 0       | 2.00           | 8            | 15.00           | 120.00           | Courts Hire   |                                     |
| Court 1          |                            | 28/10/2015      | We       | 06:00 AM          | 08:00 AM      |                 | 0       | 2.00           | 8            | 15.00           | 120.00           | Courts Hire   |                                     |
| Court 1          |                            | 29/10/2015      | Th       | 06:00 AM          | 08:00 AM      |                 | 0       | 2.00           | 8            | 15.00           | 120.00           | Courts Hire   | <b>_</b>                            |
| I otal owing or  | n this booking lir         | ne is \$0.00    |          |                   | Setup/P       | ackdown<br>Afte | r 🗌     | Annly          | Apply        | Add Booking     | Cancel           | Edit          | ►<br>Peak Period<br>Off Peak Period |
| ⊢ Adjustr        | nents                      |                 | Ot       | her Bookina       | Charge Deta   | ails            | 1       |                | Defaults     | Line            | Booking Lin      | e Booking     | Setup/Packdown                      |
| Date             |                            | Amt             | l s      | ervice Name       |               |                 |         | Otv            | Hours        | \$ Per Ho       | our Cł           | harge (\$)    | 7                                   |
| Vi               | iew Details                | Add             |          | • Price was       | Addension     | 1 Castre        | 2       | 5.8.0.         | 4            | 1               |                  |               |                                     |
| Cred             | lit Assets                 | Staff           |          | overridden        | Add Service   | Auur            | Touuc   |                | duct/service | Selected Bo     | ooking Lotal \$: | 110.00        |                                     |
| Credit           | Amount                     | Remai           | Tra      | an ID Pa          | yment Date    | Amouni          | t\$     |                | Gro          | oup Booking Tot | al: \$           | 4070.00       |                                     |
|                  |                            |                 | 161      | 1 20              | Oct 2015      | 110             | .00     |                |              | Total Pa        | id: \$           | 110.00        | _                                   |
|                  |                            |                 |          |                   |               |                 |         |                |              | Outstandin      |                  | 2000.00       | _                                   |
|                  |                            |                 |          |                   |               |                 |         |                |              | outstanuir      | '9. *            | 3300.00       |                                     |
|                  |                            |                 |          |                   |               |                 |         |                |              |                 |                  |               |                                     |
| Docum            | ents Lette                 | r Emai          |          | Booking<br>Access | Change<br>Log | Payr            | nent Si | chedule >>     | Update and P | ay Apply Ch     | anges Up         | pdate Clo     | ose                                 |



After selecting the 'Letter' button and entering the dates to include for the letter the following screen will appear.

| 8          |                  | Facility Booking Documents - 75         |  |
|------------|------------------|---|--|
| Create Boo | king Confirmatio | on Letter                               |  |
| Template:  | File Name:       | Use Default Set As Default              |  |
|            | Description:     |   |  |
|            |                  |   |  |
| Save As:   | File Path:       | C:\Links Modular Solutions\Bookings\75\ |  |
|            | File Name:       | 75_1_Letter.pdf                         |  |
|            | Description:     | 75_1_Letter                             |  |
|            | Invoice No:      | 75_1                                    |  |
|            | After Create:    | € Save C Open C Email                   |  |
|            |                  | Create Cancel                           |  |
|            |                  | Close                                   |  |

Select your Template to use by selecting the [...] button then select 'OK'.

| 1 |          |         |                               | Facility Boo   | poking Documents - 75 |
|---|----------|---------|-------------------------------|--|-----------------------|
|   | Select 1 | Femplat | e                             |  |                       |
|   |          | Id      | Name                          | File Name  | Is Default            |
|   | •        | 61      | Facility_Booking_Confirmation | C:\Links Modular Solutions\Links Templates\Facility_Booking_Confirmation.dot | ot 🔽                  |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          |         |                               |  |                       |
|   |          | ок      | Add Template                  | Cancel   |                       |

This confirmation letter can then either be saved to your document folder with the File name above, opened in a word document or emailed. Once selecting your option the 'Create' button will created the confirmation letter in your desired option.

You can select the 'Documents' button to recall all saved documents for the booking. This is how it will appear in the Facility Bookings Documents screen.

| Adjustments             | Other Booking Charge Details        |                         |                          |                  |
|-------------------------|-------------------------------------|-------------------------|--------------------------|------------------|
| Date Amt                | Service Name                        | Qty Hours               | \$ Per Hour 0            | Charge (\$)      |
|                         |                                     |                         |                          |                  |
|                         |                                     |                         |                          |                  |
|                         |                                     |                         |                          |                  |
| View Details Add        |                                     |                         |                          |                  |
| C. D. Assets Chaff      | * Price was Add Service Add Product | Edit Product/Service Se | elected Booking Total \$ | \$: 110.00       |
| Lredit Assets Starr     | overridden                          |                         |                          |                  |
| Credit Amount Remai     | Tran ID Payment Date Amount, \$     | Group Boo               | oking Total: \$          | 4070.00          |
|                         | 161 20 Oct 2015 110.00              |                         | Total Paid: \$           | 110.00           |
|                         |                                     | 0                       | )utstanding: \$          | 3960.00          |
|                         |                                     |                         |                          |                  |
|                         |                                     |                         |                          |                  |
|                         |                                     |                         |                          |                  |
| Deserverte Letter Freed | Booking Change Downey Colored to    |                         | Inv                      | oice             |
| Letter Email            | Access Log Payment Schedule         | · · · · Pay             | Apply changes S          | ent <u>close</u> |



| Ę | ].       |               |  |                 | Facility Bool                                | king Documents - 75                                 |  |               |         |               |                    |
|---|----------|---------------|--|-----------------|--|---|--|---------------|---------|---------------|--------------------|
|   | Facility | Booking Docun | nents                                  |                 |  |   |  |               |         |               |                    |
|   |          | Description   | Folder                                 | File Name       | Template Folder                              | Template File Name                                  | Added  | Added<br>By   | Updated | Updated<br>By | Attach<br>To Email |
|   | Þ        | 75_1_Letter   | C:\Links Modular Solutions\Bookings\75 | 75_1_Letter.pdf | C: \Links Modular Solutions \Links Templates | Facility Booking Confirmation.dot                   | 20/10/2015 2:11 PM                             |               |         |               |                    |
|   |          |               |  |                 |  |   |  |               |         |               |                    |
|   | 4        |               |  |                 |  |   |  |               |         |               | •                  |
|   |          | Add File      | Open File D                            | ielete File     | Send Email                                   | <ul> <li>Save Attac</li> <li>Link Attack</li> </ul> | hments to External Do<br>Iments to Source Path | ocuments Path | 🔽 Invoi | ice Sent      |                    |

Once you have saved all the Letters/Documents you require, these can be selected and attached to an email.

| 3.       |              |  |                     | Facility Bool                              | king Documents - 75               |                         |              |         |               |                    |
|----------|--------------|--|---------------------|--|-----------------------------------|-------------------------|--------------|---------|---------------|--------------------|
| Facility | Booking Doc  | uments                                       |                     |  |                                   |                         |              |         |               |                    |
|          | Description  | Folder                                       | File Name           | Template Folder                            | Template File Name                | Added                   | Added<br>By  | Updated | Updated<br>By | Attach<br>To Email |
| Þ        | 75_1_Letter  | C:\Links Modular Solutions\Bookings\75       | 75_1_Letter.pdf     | C:\Links Modular Solutions\Links Templates | Facility Booking Confirmation.dot | 20/10/2015 2:11 PM      | ĺ.           |         | 1             |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
| •        |              |  |                     |  |                                   |                         |              |         |               | Þ                  |
|          | Add File     | Open File D                                  | Delete File         | Send Email                                 | Save Attac     Control Attack     | hments to External Do   | cuments Path | 🔽 Inv   | roice Sent    |                    |
| Fond Fr  | a sil        |  |                     |  | C LINK ALLOO                      | initents to Source Faci |              |         |               |                    |
| Send Li  | mail Tay     |  |                     |  |                                   |                         |              |         |               |                    |
|          | mail to: Sug | oport@linksmodularsolutions.com              |                     |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
|          | CC:          |  |                     |  |                                   |                         |              |         |               |                    |
| _        | BCC:         |  |                     |  |                                   |                         |              |         |               |                    |
| Attac    | hments: C:   | Links Modular Solutions\Bookings\75\75_1_    | Letter.pdf          |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
| S        | ubject: Fa   | cility Quote                                 |                     |  |                                   |                         |              |         |               |                    |
| 1416     | ssage: H     | Lisa,  |                     |  |                                   |                         |              |         |               |                    |
|          | Th           | tatched is you quote for your enquiry for th | ne court nire at De | mo Location                                |                                   |                         |              |         |               |                    |
|          | Lis          | a  |                     |  |                                   |                         |              |         |               |                    |
|          | 1            |  |                     |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  | Send                              | Cancel                  |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               |                    |
|          |              |  |                     |  |                                   |                         |              |         |               | Class              |
|          |              |  |                     |  |                                   |                         |              |         |               | ciose              |

Once sent it will record in the email correspondence screen for that booking/contact.

| ł | imail C | orrespondence | Show All F         | For TEST SPORT | TS CLUB              |                                   |  |  |
|---|---------|---------------|--------------------|----------------|----------------------|-----------------------------------|--|--|
| ſ |         | Booking ID    | Date/Time          | Email CC       | Email BCC            |                                   |  |  |
|   | Þ       | 75            | 20/10/2015 2:28 PM |                | Booking Confirmation | support@linksmodularsolutions.com |  |  |



# **Email Changes**

After selecting the 'Email' button and entering the dates to include for the letter the following screen will appear.

| 8           |  | Facility Booking Documents - 75  | - • × |
|-------------|--|--|-------|
| Create Book | ing Confirmati                           | on Letter And Email  |       |
| Template:   | File Name:<br>Description:               | C:\Links Modular Solutions\Links Templates\Facility Booking Confirmation.dot Use Default Set As Default Default Template<br>Booking Confirmation |       |
| Save As:    | File Path:<br>File Name:<br>Description: | C:\Links Modular Solutions\Bookings\75\<br>75_5_Letter.pdf<br>75_5_Letter  |       |
|             | Invoice No:                              | 75_5   |       |
|             | After Create:                            | C Save C Open 🕝 Email  |       |
|             |  | Create Cancel  |       |
|             |  | Close  |       |

Select your template to use from the [...], update your file name as applicable. The 'After Create' will have 'Email' Select the 'Create' button. You will then be taken to the following screen.

| 8      |              |   |                 | Facility Bool                              | king Documents - 75               |                       |              |         |               |                    | - 🗆 X |
|--------|--------------|---|-----------------|--|-----------------------------------|-----------------------|--------------|---------|---------------|--------------------|-------|
| Facili | y Booking Do | cuments                                     |                 |  |                                   |                       |              |         |               |                    |       |
|        | Description  | Folder                                      | File Name       | Template Folder                            | Template File Name                | Added                 | Added<br>By  | Updated | Updated<br>By | Attach<br>To Email |       |
| ۱.     | 75_5_Letter  | C:\Links Modular Solutions\Bookings\75      | 75_5_Letter.pdf | C:\Links Modular Solutions\Links Templates | Facility Booking Confirmation.dot | 21/10/2015 5:34 PM    | STAFF, DEMO  |         |               | <b>V</b>           |       |
|        | 75_4_Letter  | C:\Links Modular Solutions\Bookings\75      | 75_4_Letter.pdf | C:\Links Modular Solutions\Links Templates | Facility Booking Confirmation.dot | 21/10/2015 5:26 PM    | STAFF, DEMO  |         |               |                    |       |
|        | 75_3_Letter  | C:\Links Modular Solutions\Bookings\75      | 75_3_Letter.pdf | C:\Links Modular Solutions\Links Templates | Facility Booking Confirmation.dot | 20/10/2015 4:36 PM    |              |         |               |                    |       |
|        | 75_2_Letter  | C: \Links Modular Solutions\Bookings\75     | 75_2_Letter.pdf | C:\Links Modular Solutions\Links Templates | Facility Booking Confirmation.dot | 20/10/2015 4:34 PM    |              |         |               |                    |       |
|        | 75_1_Letter  | C: \Links Modular Solutions\Bookings\75     | 75_1_Letter.pdf | C:\Links Modular Solutions\Links Templates | Facility Booking Confirmation.dot | 20/10/2015 2:11 PM    |              |         |               |                    |       |
| •      |              |   |                 |  |                                   |                       |              |         |               | •                  |       |
|        | Add File     | Open File D                                 | elete File      | Send Email                                 | Save Attac                        | hments to External Do | cuments Path |         | oice Sent     |                    |       |
| _      |              |   |                 |  | C Link Attac                      | nments to Source Path |              |         | oree bene     |                    |       |
| Send   | Email        |   |                 |  |                                   |                       |              |         |               |                    |       |
| Г Г    | Email To:    | upport@linksmodularsolutions.com            |                 |  |                                   |                       |              |         |               |                    |       |
|        | 2            |   |                 |  |                                   |                       |              |         |               |                    |       |
| L L    |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        | cc:          |   |                 |  |                                   |                       |              |         |               |                    |       |
|        | BCC:         |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
| Att    | achments: C  | : Links Modular Solutions Bookings 75 75_5_ | Letter.pdf      |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
| Г Г    | Subject:     |   |                 |  |                                   |                       |              |         |               |                    |       |
|        | Message:     |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
| L      |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  | Court 1                           | curul 1               |              |         |               |                    |       |
|        |              |   |                 |  | Send                              | Cancel                |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |
|        |              |   |                 |  |                                   |                       |              |         | _             | Close              |       |
|        |              |   |                 |  |                                   |                       |              |         |               |                    |       |

Check and change your 'Email to', add any BCC or CC, Enter a 'Subject' and 'Message' then select 'Send'.

The Email will now show in the Email Correspondence of this screen.

NOTE: Your Email for SMTP needs to be setup please see the Links Wiki if you need assistance in this setup. If you have already setup SMTP or you wish to use the local email on that



computer then you will need to go to Admin> Setup PC> Setup for PC and select 'Can Email'.

#### Facility Booking Part Payment is Identified on the Payment Screen

The Facility payment screen is able to identify when the existing transactions are present and can reduce the outstanding fee accordingly.

| 8               |                               |                   |                             | Facilit            | ty Booking  | 82             |              |                 |                       |              | X               |
|-----------------|-------------------------------|-------------------|-----------------------------|--------------------|-------------|----------------|--------------|-----------------|-----------------------|--------------|-----------------|
|                 | Date Boo                      | ked: Wea          | 21/10/2015                  | Booking            | ID 82       |                | Ref#         | 188 to 1        | 92 inclus             | ive          |                 |
| - Extensions -  | Booking De                    | tails — Deeline   | N                           |                    |             |                |              |                 | חך <sup>⊑ Mult</sup>  | iple Booking | 8               |
| 🔲 Major Event   | Casual L     Custome          | jse Booking<br>Ir | Name:                       |                    |             |                |              |                 | C Enc                 | i Date:      |                 |
| Event           | C Client                      | Custor            | nerld:  5                   | <u>_</u>           | lew \       | View           |              |                 |                       |              | _               |
| Details         |                               | н.<br>И           | Name: JUNES, BHE            | ll<br>Generation   | A min and   |                |              |                 | C Per                 | iod:         |                 |
| Enquiry         | C Confirme                    | ed in the         | ernou. C Invoice Ar         | count (• Cashon    | Alliva      | _              |              |                 | Booking               | Туре:        | <b>T</b>        |
| Details         | <ul> <li>Tentativi</li> </ul> | e Ins             | tructions:                  |                    | 0/255 Pi    | 0 Number:      | <b>—</b> •   | 10.11           |                       |              | View Details    |
|                 |                               | Prim              | e Usage:                    | -                  |             |                | Permar       | hent Booking    |                       |              | TIOT D OCATO    |
| Facility Name   | •                             | Date              | Day From Time               | To Time Atter      | nded Pax [  | Duration (hrs) | No. Periods  | \$ Per Period   | Charge (\$)           | Service Nam  | e [             |
| Court 1         |                               | 20/10/2015        | Tu 08:15 AM                 | 09:15 AM           |             | 1.00           | 4            | 15.00           | 50.00                 | Courts Hire  |                 |
| Court 1         |                               | 21/10/2015        | We 08:15 AM                 | 09:15 AM           | j 0 1       | 1.00           | 4            | 15.00           | 50.00                 | Courts Hire  |                 |
| Court 1         |                               | 22/10/2015        | Th 08:15 AM                 | 09:15 AM           |             | 1.00           | 4            | 15.00           | 50.00                 | Courts Hire  |                 |
| Count           |                               | 23/10/2013        | FI 00.15 AM                 | 03.15 AM           |             | 1.00           | 4            | 10.00           | 30.00                 | Counts Hile  |                 |
|                 |                               |                   |                             |                    |             |                |              |                 |                       |              |                 |
|                 |                               |                   |                             |                    |             |                |              |                 |                       |              |                 |
|                 |                               |                   |                             | - Setup / Pack dou |             |                |              |                 |                       |              |                 |
| l otal owing on | this booking lir              | ne is \$50.00     |                             | Before:            | After:      | Apply          | Apply        | Add Booking     | Cancel<br>Declaration | Edit         | Off Peak Period |
| _ Adjustme      | ents ———                      |                   | □ □ □ Other Booking         | Charge Details —   |             |                | Defaults     | Line            | BOOKING LIN           | BOOKING      | Setup/Packdown  |
| Date            |                               | Amt               | Service Name                |                    |             | Otv            | Hours        | \$ Per Ho       | ur Cł                 | arge (\$)    |                 |
|                 |                               |                   |                             |                    |             | 1 -0           | 1            |                 |                       |              | -               |
|                 |                               |                   |                             |                    |             |                |              |                 |                       |              |                 |
|                 |                               |                   |                             |                    |             |                |              |                 |                       |              |                 |
| View            | v Details                     | Add               |                             |                    |             |                |              |                 |                       |              |                 |
| Credit          | Assets                        | Staff             | * - Price was<br>overridden | Add Service        | Add Product | E dit Prod     | uct/Service  | Selected Bo     | ooking Total \$:      | 50.00        |                 |
| Credit          | Amount                        | Remai             | Tran ID Pa                  | wment Date Ar      | mount \$    | 1              | Gro          | oup Booking Tot | al: \$                | 250.00       |                 |
|                 |                               |                   |                             | J                  |             |                |              | Total Pai       | H \$                  | 0.00         |                 |
|                 |                               |                   |                             |                    |             |                |              | Outotonadia     | ~ * [                 | 250.00       |                 |
|                 |                               |                   |                             |                    |             |                |              | Outstanun       | y. »                  | 200.00       |                 |
|                 |                               |                   |                             |                    |             |                |              |                 |                       |              |                 |
|                 |                               |                   |                             |                    |             |                |              |                 |                       |              |                 |
| Documer         | nts Lette                     | r Ema             | il Booking<br>Access        | Change<br>Log      | Payment Sch | edule >>       | Update and P | ay Apply Cha    | anges Up              | odate C      | llose           |

Example. The booking below owes \$50 per line.

When we select 'Update and Pay' the Payment Screen shows \$150.00 outstanding and defaults to \$50.00 for the past three dates.

| 6 |            |             |          | Fac                | ility Payments      |                |        | _ □   | x    |
|---|------------|-------------|----------|--------------------|---------------------|----------------|--------|-------|------|
|   | Pay Option | C Pay All A | Attended | C Pay to this date | Ć F                 | ay this amount |        |       |      |
|   | Facility   | Date        | Time     | Product/Service    | Attended            | Amount.        | Pav.   |       |      |
|   | Court 1    | 19 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 50.00  |       |      |
|   | Court 1    | 20 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 50.00  |       |      |
|   | Court 1    | 21 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 50.00  |       |      |
|   | Court 1    | 22 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 0.00   |       |      |
|   | Court 1    | 23 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 0.00   |       |      |
|   |            |             |          | TOTALS \$.         |                     | 250.00         | 150.00 |       |      |
|   |            |             |          | Outstanding        | Balance:: \$ 250.00 |                | ✓ 0K   | × Car | icel |



If you Pay \$50.00 for the first two lines and \$25.00 for the third line today.

| <b>B</b> , |             |          | Fac                | ility Payments      |                |              | _ <b>D</b> X |
|------------|-------------|----------|--------------------|---------------------|----------------|--------------|--------------|
| Pay Option | ⊂ Pay All A | Attended | C Pay to this date | C P                 | ay this amount |              |              |
| Facility   | Date        | Time     | Product/Service    | Attended            | Amount.        | Pay.         |              |
| Court 1    | 19 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 50.00        |              |
| Court 1    | 20 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 50.00        |              |
| Court 1    | 21 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 25.00        |              |
| Court 1    | 22 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 0.00         |              |
| Court 1    | 23 Oct 2015 | 08:15:00 | Courts Hire        |                     | 50.00          | 0.0 <b>0</b> |              |
|            |             |          | TOTALS &           |                     | 250.00         | 125.00       |              |
|            |             |          | Outstanding I      | Balance:: \$ 250.00 |                | ✔ ОК         | × Cancel     |

Next time you go to do a Facility Payment the booking line only charges \$25.00 for the third line now as it recognises the initial \$25 paid.

| <b>B</b> , |             |          |                    | Facility Payments           |          |                |       | _ □  | x    |
|------------|-------------|----------|--------------------|-----------------------------|----------|----------------|-------|------|------|
| Pay Option | C Pay All A | Attended | O Pay to this date |                             | C P      | ay this amount |       |      |      |
| Facility   | Date        | Time     | Product/Service    |                             | Attended | Amount,        | Pay,  |      |      |
| Court 1    | 21 Oct 2015 | 08:15:00 | Courts Hire        |                             |          | 25.00          | 25.00 |      |      |
| Court 1    | 22 Oct 2015 | 08:15:00 | Courts Hire        |                             |          | 50.00          | 0.00  |      |      |
| Court 1    | 23 Oct 2015 | 08:15:00 | Courts Hire        |                             |          | 50.00          | 0.00  |      |      |
|            |             |          | TOTALS \$:         |                             |          | 125.00         | 25.00 |      |      |
|            |             |          | Outs               | tanding Balance:: \$ 125.00 | 1        |                | ✓ OK  | X Ca | ncel |



# Ability to close off bookings from Financial Changes

You now have an option to select a box, to ensure no changes to any financials on a booking can be changed.

From the Documents screen you have an 'Invoice Sent' Tick box when the user clicks this a warning is displayed to indicate that the Facility Booking is not able to be changed.

|         |              |           |              |                    |                       |                            | Facili         | ty Booking    | Documents       | - 82               |                 |                  |              |  |
|---------|--------------|-----------|--------------|--------------------|-----------------------|----------------------------|----------------|---------------|-----------------|--------------------|-----------------|------------------|--------------|--|
| acility | Booking Docu | iments    |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         | Description  | Folder    | File<br>Name | Template<br>Folder | Template<br>File Name | Added                      | Added<br>By    | Updated       | Updated<br>By   | Attach<br>To Email |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              | 1         |              | 1                  | 1                     |                            | 1              |               | 6               | Cause Athreads     |                 | De sus este Bath |              |  |
|         | Add File     |           | Open File    | Delete F           | ile                   | Send Email                 |                |               | Ċ               | Link Attachn       | nents to Source | Path             | Invoice Sent |  |
| :mail C | orrespondenc | e 🗆       | Show All For | JONES, BRETT       |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         | Booking ID   | Date/Time | Staff Na     | me Email Subjec    | t Email To            | Email CC                   | Email B        | CC            |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                | Invoi         | ce Sent         |                    | ×               |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       |                            |                |               |                 |                    |                 |                  |              |  |
|         |              |           |              |                    |                       | This will lock             | k the Facility | Booking so th | at no further c | hanges can b       | oe made.        |                  |              |  |
|         |              |           |              |                    |                       | This will loc<br>Continue? | k the Facility | Booking so th | at no further c | hanges can t       | oe made.        |                  |              |  |
|         |              |           |              |                    |                       | This will loc<br>Continue? | k the Facility | Booking so th | at no further c | hanges can b       | be made.        | 1                |              |  |

Documents screen showing the Invoice Sent flag is ON. User does have permission to reverse this flag. (Administrator or specified security group has permissions to clear this flag).

| ].         |              |        |              |                    |                       | Facil      | lity Booking | g Documen | ts - 82       |                    |                | - 🗆 X |
|------------|--------------|--------|--------------|--------------------|-----------------------|------------|--------------|-----------|---------------|--------------------|----------------|-------|
| Facility E | Booking Docu | ments  |              |                    |                       |            |              |           |               |                    |                |       |
|            | Description  | Folder | File<br>Name | Template<br>Folder | Template<br>File Name | Added      | Added<br>By  | Updated   | Updated<br>By | Attach<br>To Email |                |       |
|            |              |        |              |                    |                       |            |              |           |               |                    |                |       |
|            |              |        |              |                    |                       |            |              |           |               |                    |                |       |
|            |              |        |              |                    |                       |            |              |           |               |                    |                |       |
|            |              |        |              |                    |                       |            |              |           |               |                    |                |       |
|            | Add File     |        | Open File    | Delete F           | ile                   | Send Email | 1            |           |               |                    | ✓ Invoice Sent |       |
| EmailCo    | orrespondenc |        |              |                    |                       |            |              |           |               |                    |                | -     |

When the Invoice Sent flag is ON, the Facility Booking screen editable functions are disabled and "Invoice Sent" is displayed next to the Close button. User is still able to Pay an amount against this booking using the Pay button.



| 8  |  |   |   |   | Facility Bookir                                    | ng 82  |                                 |  |  |   | x  |
|--|--|---|---|---|--|--|---------------------------------|--|--|---|--|
| Extensions   | Date Booke                             | d: Wed  | 21/10/2015  | Boo   | king ID 82   |  | Ref#                            | 188 to 19  |  | i <mark>VO</mark><br>iple Bookings  |  |
| Major Event  | C Casual Use<br>© Customer<br>C Client | Booking 1<br>Custon   | Name:<br>nerld: 5   |   | New  | View   |                                 |  | C En   | d Date:   | D  |
| Enquiry<br>Details   | C Confirmed                            | Me  | Tame: JUNES, BRET<br>sthod: C Invoice Ac  | count 💿 C   | ash On Arrival                                     | P0 Number:   |                                 |  | C Per<br>Booking   | riod:   | Ţ  |
|  |  | Prime   | e Usage:  |   | -  | r o rtuilioir.   | Permar                          | nent Booking   |  |   | View Details                                     |
| Facility Name<br>Court 1<br>Court 1<br>Court 1<br>Court 1<br>Court 1 | e 19<br>20<br>21<br>22<br>23           | Date<br>9/10/2015<br>0/10/2015<br>1/10/2015<br>2/10/2015<br>3/10/2015 | Day         From Time           Mo         08:15 AM           Tu         08:15 AM           We         08:15 AM           Th         08:15 AM           Fr         08:15 AM | To Time<br>09:15 AM<br>09:15 AM<br>09:15 AM<br>09:15 AM<br>09:15 AM | Attended Pax 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | Duration (hrs)<br>1.00<br>1.00<br>1.00<br>1.00<br>1.00<br>1.00 | No. Periods 4 4 4 4 4 4 4 4 4 4 | \$ Per Period<br>15.00<br>15.00<br>15.00<br>15.00<br>15.00 | Uharge (\$)<br>50.00<br>50.00<br>50.00<br>50.00<br>50.00 | Service Name<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire<br>Courts Hire |  |
| ↓<br>Total owing on I  | this booking line is                   | : \$0.00  | Other Deckies   | Setup/F<br>Before:  | <sup>p</sup> ackdown<br>After:                     | Apply  | Apply<br>Defaults               | Add Booking<br>Line  | Cancel<br>Booking Lin                                    | e Booking   | Peak Period<br>0 f Peak Period<br>Setup/Packdown |
| Date   | v Details                              | Add   | Service Name  |   | alis   | Qıy  | y Hours                         | \$ Per Ho  | ur Cł  | narge (\$)  |  |
| Credit   | Assets<br>Amount Re                    | Staff<br>mai  | * - Price was<br>overridden<br>Tran ID Pa<br>169 21   | Add Service<br>yment Date<br>Oct 2015                               | Add Produce  | Edit Pro   | oduct/Service<br>Gro            | Selected Bo<br>up Booking Tota<br>Total Pai                | oking Total \$:<br>al: \$<br>d: \$                       | 50.00<br>250.00<br>150.00   |  |
| Documen  | nts Letter                             | Ema   | i   | Chang<br>Log  | e Payment S  | chedule >>   | Pay                             | Apply Cha  | nges <b>Invo</b><br>Se                                   | iice C  | lose   |

When the Invoice Sent flag is ON, the editable functions are disabled on the Transaction Maintenance screen.

| B Facility Booking 82   | x ails                                     | New Booking   |
|---|--|---|
| Date Booked: Wed 21/10/2015 Booking ID 82 Ref # 188 to 192 inclusive  | <b>— —</b> 7 P                             | av View   |
| Casual Use Booking Name:  | ne Only                                    | -,  |
| C Listomer La Santa Contraction Maintenance     C Client     C Client     New     New     S     Transaction Maintenance     New   | e  | ×   |
| Enquity<br>Details     C Confirmed<br>C Tentative     Method: C Invoice Account © Cash On Arrival<br>Instructions;     Transaction<br>0/255       Prime Usage;     Image: Confirmed<br>Prime Usage;     Image: Confirmed<br>Prime Usage;     Image: Confirmed<br>Prime Usage;   | 7 💌  | Time: 5:49 PM   |
| Facility Name         Date         Day         From Time         To Time         Attended Pax         Lines           Court 1         12/10/2015         Mol 00315/AM         00315/AM         00         0315/AM         0           Court 1         20/10/2015         Tu         0815/AM         001         0315/AM         0           Court 1         21/10/2015         We         0815/AM         0915/AM         0         0           Court 1         22/10/2015         Th         0815/AM         0915/AM         0         0           Court 1         22/10/2015         Fr         0815/AM         0915/AM         0         0           Court 1         22/10/2015         Fr         0815/AM         0915/AM         0         0           Court 1         23/10/2015         Fr         0815/AM         0         0         51006         Courts Hire           S1006         Court Hire         S1006         Courts Hire         51006         Court Hire   | Unit Price, \$ Q<br>12:50<br>12:50<br>6:25 | ty Total.\$<br>4 50.00<br>4 50.00<br>4 25.00<br>4 25.00         |
| Image: Constraint of the second se | T<br>F<br>Gra                              | otal GST: \$ 11.37<br>Rounding: \$ 0.00<br>and Total: \$ 125.00 |
| View Details     Add       Credit     Assets       Staff       Credit     Amount, Remai       Tran ID     Payment Date       1159     21 Oct 2015       50.00   | iew/Change                                 | etomerid: 5   |
| Documents         Letter         Email         Change<br>Log         Payment Schedule         Pay         Apply Changes         Invoice<br>Sent         Close   |  |   |



To allow the 'Invoice Sent' option to be unselected the following needs to be ticked in Security Groups. 'Can reverse Invoice Sent Flag'.





# Facility Enquiries

Links now has the ability to allow you take enquiries for facility hire and keep track of enquires made by customers with tentatively outlining the space has expressed interest.

A menu item has been created in POS to add a new enquiry POS> Facility> New Enquiry.

| <b>1</b> |           |      |            |                                 |              |        |      |       |
|----------|-----------|------|------------|---------------------------------|--------------|--------|------|-------|
| 🗊 File   | Till      | Faci | lity       | Maintain                        | Cus          | tomers | Rete | entic |
| Curre    | nt Tr     |      | Vis<br>Fac | ual Facility l<br>cility Calend | Booki<br>Iar | ings   |      |       |
| Doco     | ni m ti s |      | Ne         | w Enquiry                       |              |        |      |       |
| Desc     | nput      |      | En         | quiry Manag                     | ger          |        |      | _     |
|          |           |      |            |                                 |              |        |      | -     |

When the New Enquiry screen is open you can enter new enquiries without making a booking and review previously entered enquiries. Enter in the required information and save, from the bookings tab you can select the facility and times wanting from the Vacancies button.

| 8   | New Enquiry                                    | _ 🗆 🗙 |
|---|--|-------|
| File  |  |       |
| Contact Details C Casual Customer ID: C Customer Name: C Client | View         New         No Enquiries Recorded |       |
| New Enquiry   |  |       |
| Details Bookings Follow Up Correspondence                       |  |       |
| Priority: 1   |  |       |
| Enquiry Name:   |  |       |
|   |  | ×     |
| Save  |  |       |
|   |  | Close |

You can also create a new enquiry through the Booking Scheduler, Find the space and times you wish to enquire on and select like a normal booking but instead select the booking option of New Enquiry/Create Enquiry.



Create enqu

10:45 AM

| 14:00-22:00 |  |
|-------------|--|
| All Times   |  |
| Color Key   |  |
| New Enquiry |  |
|             |  |
| M Lane 8    |  |
|             |  |
|             |  |
|             |  |
|             |  |
|             |  |

When an Enquiry has been made this will not block the lines out as if a booking has been made. It indicates an expression of interest for that Client or Customer. These will show as purple in the Visual Facility Bookings screen.

| Centre Facilities | T:       |                  | F0- h    | FOM DI    | Diah dan Daah  |
|-------------------|----------|------------------|----------|-----------|----------------|
| AC TRIAL          | Times    |                  | JOM DOOM | JUM FOOI  | birthday Farty |
| ⊡- 50m boom       | 09:00 AM |                  |          |           |                |
| E 50M Pool        | 09:15 AM |                  |          |           |                |
| - Birthday Party  |          |                  |          |           |                |
| 🖻 Creche Bookings | 09:30 AM |                  |          |           |                |
| 🗄 Health Club     | 09:45 AM |                  |          |           |                |
| Meeting Rooms     | 03.43 AM |                  |          |           |                |
| ≜ Stadium         | 10:00 AM | Part Of Enguiry  |          | [Enguiry] |                |
| Court 1           | L        | r an or Engoly   |          | [[[]]]    |                |
| ⊡ Court 2         | 10:15 AM | Part Of Enquiry  |          | [Enquiry] |                |
|                   | 10:30 AM | Part Of Enquiry  |          | [Enquiry] |                |
|                   | 10:45 AM | Part Of Enquiry  |          | [Enquiry] |                |
|                   | 11:00 AM | Part Of Enquiry  |          | [Enquiry] |                |
|                   | 11:15 AM | Part Of Enquiry  |          | [Enquiry] |                |
|                   | 11:30 AM | Unavailable Time |          | [Enquiry] |                |
|                   | 11:45 AM | Unavailable Time |          | [Enquiry] |                |
|                   | 12:00 PM | Unavailable Time |          | [Enquiry] |                |
|                   | 12:15 PM | Unavailable Time |          | [Enquiry] |                |
|                   | 12:30 PM | Unavailable Time |          |           |                |

The below security parameter's dictate which booking and/or enquiry clashes the user is allowed to override.

These are set up through Admin> Security> Security Groups> Facility Tab.



| 0   |  | Security G   | roup Setup  |               |               | x    |
|---|--|--|---|---------------|---------------|------|
| Group Code: ADMINI:<br>Description: ADMINI:<br>IX Admin<br>Ve<br>Can create casue<br>Can con con casue<br>Can con con con con con con con con con co | STRATOR<br>STRATOR<br>STRATOR<br>POS<br>POS<br>Pookings:<br>bookings:<br>days in advance.<br>ak PAY NDW<br>level facilities.<br>al bookings:<br>cation's facilities.<br>ng Charge after Payment made<br> | Classes<br>consult link<br>Can source extern<br>Can book in unava<br>Can unlock open b<br>Can sunlock open b<br>Can sunlock open b<br>Can scess enquig<br>Can access enquig<br>Can access enquig<br>Can see Booking L<br>Can see Booking L<br>Can use Booking L<br>Can source exis<br>Can enquire over e<br>Can enquire over e | Members<br>Members<br>ual documents path<br>ilable times<br>cookings<br>creen access<br>y screen<br>documents and files<br>e Sent Flag<br>etter DPEN function<br>ting enquity<br>xisting enquity<br>xisting booking | Group Members | IName FF DEMO |      |
| Allowed   | Facilities   |  | Menu<br>Security  | Save Delete   | Clear Clore   | Dose |

When making a booking from the New Enquiry screen the options of 'Include Enquiries' and 'Include Booking Space' will be available to add facility booking lines where an existing booking and/or enquiry exists. These options are based on the user privileges as above.

| 0   | Visual Scheduler Filters   | x                    |
|---|--|----------------------|
| Select Filters:<br>Available<br>Centre Facilities<br>G-AC TRIAL<br>50m Boon<br>G-BinHay Party<br>Creche Bookings<br>G-Health Cub<br>Meeting Rooms<br>G-Stadium<br>Court 1<br>B: Court 2 | Selected Facily Name       Assessment     Personal       Assessment     Trainer       Selected Facily Name     ACTRIAL > Stadium > Court 1       ACTRIAL > Stadium > Court 1     ACTRIAL > Stadium > Court 1       Filter:     Betweer:     20 OCT 2015     D       Betweer:     120 OPM     and:     20 OPM       All     Monday     Tuesday     Image: Calculate OffPeak Charge  |                      |
|   | Image: Constraint of the status         Image: Constraint of the status <thimage: constatus<="" th="">         Image: Constraint of the statu</thimage:>   |                      |
| ** Double click on Facility<br>to add to the list   | Image: Select All Available       *** Double click on Booking or Enquiry to View         Image: Include Unavailable Times       Image: I | Expand View<br>Close |

Once you have made your Enquiry the booking lines can be edited by clicking on the 'View/Edit Bookings' from the Booking Tab. This will then open the 'Facility Booking – Modify' screen where prices and additional Products/Services can be edited.



Booking lines will also highlight blue if the new enquiry clashes with an existing enquiry and red if the new enquiry clashes with an existing booking.

| 3          |                   |               |        |                |         |            |      | En       | quiry 73  |       |            |                 |              |              |                    | _ □ × |
|------------|-------------------|---------------|--------|----------------|---------|------------|------|----------|-----------|-------|------------|-----------------|--------------|--------------|--------------------|-------|
| File       |                   |               |        |                |         |            |      |          |           |       |            |                 |              |              |                    |       |
| Contact D  | etails            |               |        |                |         |            |      |          | Fro       | m TES | T SCHOOL   |                 |              |              |                    |       |
| C Casual   | ci:               |               |        |                |         |            |      | 1        |           | E     | Enquiry ID | Enquiry Name    | Priority     | Status       | Created            |       |
| C Custor   | Clie              | ent ID: 11    |        |                |         | view       | N    | ew       | Þ.        | 7     | 3 5        | School carnival | 1            | Tentative    | 20/10/2015 9:34 AM |       |
| G Client   |                   | lame:  TEST   | SCHOOL |                |         |            |      |          |           | 7     | 0 5        | School Carnival | 1            | Open         | 20/10/2015 9:22 AM |       |
| (• Client  |                   |               |        |                |         |            |      |          |           |       |            |                 |              |              |                    |       |
| Enquiry II | 0 73              |               |        |                |         |            |      |          |           | _     |            |                 |              |              |                    |       |
| Details B  |                   | Corresponde   | ence   |                |         |            |      |          |           |       |            |                 |              |              |                    |       |
| Detailo    | 5 Training        | - concoponed  |        |                |         |            |      |          |           |       |            |                 |              |              |                    | 1     |
| Enqui      | ry Bookings - Ten | tative        |        |                |         |            |      |          |           |       |            |                 |              |              |                    |       |
| V          | acancies V        | iew/Edit Book | ings   | Convert to Boo | kings   | View Sched | uler | Document | ts        |       | Av         | vailable Clash  | withBooking  | Clash with I | Enquiry            |       |
|            |                   |               |        |                |         |            |      |          |           |       |            |                 |              |              |                    |       |
|            | Facility Name     | Date          | Day    | From Time      | To Time | Attended   | Pax  | Duration | No. Perio | ods   | Per Period | Charge          | Service Name |              |                    |       |
|            |                   |               |        |                |         |            |      |          |           |       |            |                 |              |              |                    |       |

The View/Edit screen allows users to modify all aspects of the enquiry booking lines (e.g days, times, charges and additional Products/Services).

| 8   | Facility Booking 84   |
|---|---|
| Date Booked: T                              | nu 22/10/2015 Booking ID 84 Ref # 175   |
| Extensions Booking Details                  | N Date Creative   |
| Major Event C Casual Use Book               | ng Name:  pwim camival  |
| Event Client                                | Client Id: 6 New View Contact: SAM  |
| © Enquiry                                   | Name: ASCUT VALE PRIMART  |
| Enquiry C Confirmed                         | Booking Type:   |
| Devails                                     | nstructions: U/255 PU Number: View Details  |
|   | I'rreinianeni bouking   |
| Facility Name Date                          | Day From Time To Time Attended Pax Duration (mins) No. Periods \$ Per Period Charge (\$) Service Name                                   |
| 25/10/201                                   |   |
|   |   |
|   |   |
|   |   |
| 1   |   |
| Total owing on this booking line is \$5,000 | 00 Setup/Packdown Apply Add Booking Cancel Edit Off Peak Period   |
| - Adjustments                               | Berore: Arren Apply Defaults Line Booking Line Booking Setup/Packdown   |
| Date Amt                                    | Service Name Dtu Houre \$ Per Hour Charge (\$)  |
|   |   |
|   |   |
| ,<br>View Details Add                       |   |
|   | * - Price was Add Service Add Product Edit Product/Service Calculated Partice Table E 000.00  |
| Credit Assets Staff                         | overridden Had comos Had Hadat Zak Hadat of Had Selected Booking Hada 4. 3,000,00   |
| Credit Amount Remai                         | Group Booking Total: \$ 5000.00   |
|   |   |
|   | Uutstanding: \$ 5000.00   |
|   |   |
|   |   |
| Documents Quote                             | DOUKING<br>Access         Change<br>Log         Payment Schedule         Pay Deposit         Apply Changes         Update         Close |

The enquiry can be converted to a booking by clicking the 'Convert to Bookings' button.

| <b>B</b> .       |                      |                 |             |             |      | Enqu      | iry 84      |               |                 |              |              |                    | _ 🗆 X |
|------------------|----------------------|-----------------|-------------|-------------|------|-----------|-------------|---------------|-----------------|--------------|--------------|--------------------|-------|
| File             |                      |                 |             |             |      |           |             |               |                 |              |              |                    |       |
| Contact Details  |                      |                 |             |             |      |           | From /      | ASCOT VALE PR | RIMARY          |              |              |                    |       |
| C Casual         | Client ID: 6         |                 |             | View        | Nou  | . 1       |             | Enquiry ID    | Enquiry Name    | Priority     | Status       | Created            |       |
| C Customer       | Citeric 10. jo       |                 |             | view        | INCO | <u> </u>  | •           | 84            | Swim Carnival   | 1            | Tentative    | 22/10/2015 9:20 AM |       |
| Client           | Name: JASCO          | OT VALE PRIMARY |             |             |      |           |             | 77            | Lane Hire       | 1            | Tentative    | 18/09/2015 1:43 PM |       |
| st chunc         |                      |                 |             |             |      |           |             |               |                 |              |              |                    |       |
| Enquiry ID 84    |                      |                 |             |             |      |           |             |               |                 |              |              |                    |       |
| Details Bookings | Follow Up Correspond | lence           |             |             |      |           |             |               |                 |              |              |                    |       |
| Enquiry Book     | ings - Tentative     |                 |             |             |      |           |             |               |                 |              |              |                    |       |
| Vacancies        | View/Edit Book       | kings Convert   | to Bookings | View Schedu | ler  | Documents |             |               | Available Clasi | withBooking  | Clash with I | Enquiry            |       |
| Facilit          | y Name Date          | Day From Tim    | e To Time   | Attended    | Pax  | Duration  | No. Periods | Per Period    | Charge          | Service Name |              |                    |       |
| ▶ 50M P          | pol 23/10/2015       | Fr 9:00 AM      | 2:00 PM     | No          | 0    | 300       |             | 20 \$25       | 0.00 \$5,000.00 | Pool Hire    |              |                    |       |
|                  |                      |                 |             |             |      |           |             |               |                 |              |              |                    |       |



This will launch the booking edit screen displayed below where the status will update to 'Confirmed' but indicate it came from an enquiry.

| 5  |   |   |  | Facility Bookir                            | ng 84                        |  |   |  | x  |
|--|---|---|--|--|------------------------------|--|---|--|--|
| Extensions -<br>Major Even<br>Event<br>Details<br>Enquiry<br>Details | Date Booked<br>Booking Details<br>C Casual Use<br>C Custome<br>C Cient<br>Enquiry<br>C Confirmed<br>C Tentative | : Thu 22/10,<br>Booking Name: Sw<br>Client Id: 6<br>Name: AS<br>Method: C<br>Instructions: Prime Usage: [ | /2015 Boo  | View Contact:                              | SAM<br>Status:<br>PO Number: | Ref #                                  | 175<br>• ent Booking  | C End Date:<br>C End Date:<br>C Period:<br>Booking Type: | okings   |
| Facility Na  | ne 237  | Date Day F<br>10/2015 Fr 05<br>\$5,000.00   | iom Time To Time<br>100 AM 02:00 PM<br>Setup/F<br>Before:                              | Attended Pax O Attended Pax O Attended Pax | Duration (mins<br>300        | No. Periods<br>20<br>Apply<br>Defaults | \$ Per Period 250.00  | Cancel Booking Line Booking Line                         | ice Name<br>Hire<br>Edit Peak Period<br>Off Peak Period<br>Off Peak Period |
| Credit   | iew Details A<br>iii Assets A<br>Amount Rem   | xdd *-P<br>staff ovy  | r Booking Charge Det<br>ice Name<br>nice was<br>erridden Add Service<br>D Payment Date | ails                                       | Edit Proc                    | Hours<br>duct/Service<br>Grou          | \$ Per Hour<br>Selected Book<br>ap Booking Total<br>Total Paid:<br>Outstanding: | Charge (\$)  |  |
| Docun  | ents Letter   | Email   | Booking Chang<br>Access Log  | e Payment S                                | chedule >>                   | Pay Deposit                            | Apply Chang   | es Update  | Close  |

The Enquiry can be viewed visually by clicking the 'View Scheduler' button.

|        |                       |                |            |               |         |            |       | Enqu      | iiry 84     |              |                |              |              |                    |  |
|--------|-----------------------|----------------|------------|---------------|---------|------------|-------|-----------|-------------|--------------|----------------|--------------|--------------|--------------------|--|
| ile    |                       |                |            |               |         |            |       |           |             |              |                |              |              |                    |  |
| Conta  | act Details           |                |            |               |         |            |       |           | From AS     | COT VALE PRI | MARY           |              |              |                    |  |
| 0.00   | sual ou               |                |            | _             | (       |            |       | 1         |             | Enquiry ID   | Enquiry Name   | Priority     | Status       | Created            |  |
| 0.00   | stomer Cli            | ent ID:  o     |            |               |         | view       | N     | w         | •           | 84           | Swim Carnival  | 1            | Tentative    | 22/10/2015 9:20 AM |  |
| e di   | ant                   | Name: ASC      | OT VALE PR | RIMARY        |         |            |       |           |             | 77           | Lane Hire      | 1            | Tentative    | 18/09/2015 1:43 PM |  |
| Circle | ent                   |                |            |               |         |            |       |           |             |              |                |              |              |                    |  |
| Enqui  | iry ID 84             |                |            |               |         |            |       |           |             |              |                |              |              |                    |  |
| Detai  |                       | Correspond     | ence       |               |         |            |       |           |             |              |                |              |              |                    |  |
| Detas  |                       | - Correspond   | crice      |               |         |            |       |           |             |              |                |              |              |                    |  |
| Er     | nquiry Bookings - Ter | itative        |            |               |         |            |       |           |             |              |                |              |              |                    |  |
|        | Vacancies \           | /iew/Edit Bool | tings      | Convert to Bo | okings  | View Sched | luler | Documents |             | ,            | Available Clas | withBooking  | Clash with E | Enquiry            |  |
| _      |                       | 1              |            |               | 1       | 1          |       |           |             | 1            | 1              | 1            |              |                    |  |
| -      | Facility Name         | Date           | Day        | From Time     | To Time | Attended   | Pax   | Duration  | No. Periods | Per Period   | Charge         | Service Name | _            |                    |  |
|        | 50M Pool              | 23/10/2015     | Fr         | 9:00 AM       | 2:00 PM | No         | 0     | 300       |             | 20 \$250.    | 00 \$5,000.00  | Pool Hire    |              |                    |  |

You can also restrict staff from accessing the enquiry screen this can be turned on from Admin> Security> Security Groups> Facility Tab.



| Modules                 | POS                       | Classes Members  |
|-------------------------|---------------------------|--|
| VP                      | Facility                  | consult.link   |
| Can modify facility boo | okings.                   | Can override external documents path   |
| Lan create casual bo    | okings - cash oniy.       | Can book in unavailable times  |
| Lan assign staff        | assets.                   | Can unlock open bookings   |
| Only book               | days in advance.          | 🕱 Can limit booking screen access  |
| 🗌 Can only book P       | AY NOW                    | 🔀 Can access enquiry screen  |
| 🗌 Only book lowest leve | el facilities.            | Can delete booking documents and files   |
| 🗌 Only attend casual bo | ookings.                  | Can reverse Invoice Sent Flag  |
| 🕱 Can view book locatio | on's facilities.          | Can use Booking Letter OPEN function   |
| Can modify Booking C    | Charge after Payment made | <ul> <li>Can book over existing enquiry</li> <li>Can enquire over existing enquiry</li> <li>Can enquire over existing booking</li> </ul> |

When staff do not have access they will see the following message when they try to access the enquiry screen.

|          | Point of Sale  | x |
|----------|--|---|
| <u> </u> | Your Staff Code is not authorized to access Enquiries or the Facility<br>Calendar. |   |
|          | OK.  |   |



# **Facility Quotes**

You can now create a quote for a Facility Booking.

To create a new quote template

Go to Admin> Letter> Templates.

| E    |          |      |       |          |     |          |         |                   |                |           |              |          |          |         | admin.link              |  |
|------|----------|------|-------|----------|-----|----------|---------|-------------------|----------------|-----------|--------------|----------|----------|---------|-------------------------|--|
| File | Security | Site | Admin | Setup PC | POS | Facility | Classes | Products/Services | Memberships/VP | Retention | Direct Debit | Sessions | Messages | Letters | Help                    |  |
|      |          |      |       |          |     |          |         |                   |                |           |              |          |          | N       | Aail Merge Data Sources |  |
|      |          |      |       |          |     |          |         |                   |                |           |              |          |          | Т       | emplates                |  |
|      |          |      |       |          |     |          |         |                   |                |           |              |          |          | S       | etup Links Letter       |  |

Select Facility Booking Quote and Click 'Add Template'.

| 8  | Links Letter Templates                   |          | x |
|--|--|----------|---|
| Links Letter Data Sources *  | Templates available                      |          |   |
| Name Customer Facility Booking Confirmation Fracility Booking Quote Franity MemContract Retention StudentDetails | Template Description File                | location |   |
| Data Source Description:   |  |          |   |
|  | Add Template Edit Template Edit Template | e Close  |   |

Select [...] and then select the location to save the template. This should be the same location as your other Links Templates, ideally on a shared drive. Give the File a name this must be saved as a '.dot' file format.

| 8                    | В  | rowse For File       |                  |      |                            | )      |
|----------------------|--|----------------------|------------------|------|----------------------------|--------|
| € ⊚ - ↑ 퉬 • 0        | Computer 🕨 Local Disk (C:) 🕨 Links Modular Solut | ions 🕨 Links Templat | es               | ✓ C  | Search Links Templates     | Q      |
| Organize 👻 New folde | r  |                      |                  |      | 8== -                      |        |
| 🔆 Favorites          | Name   | Date modified        | Туре             | Size |                            |        |
| Desktop              | Advance_Debit_Notice.dot                         | 20/07/2012 4:02 PM   | Microsoft Word 9 | 80 I | KB                         |        |
| 鷆 Downloads          | All_Customers.dot                                | 21/07/2012 6:09 PM   | Microsoft Word 9 | 26   | (B                         |        |
| 🔠 Recent places      | Attendance_Decrease_Report.dot                   | 21/07/2012 6:08 PM   | Microsoft Word 9 | 27 1 | (B                         |        |
|                      | Attendance_Increase_Report.dot                   | 21/07/2012 6:08 PM   | Microsoft Word 9 | 27 1 | KB                         |        |
| 🥽 Libraries          | 👿 Average_Time_as_a_Member_Report.dot            | 20/07/2012 4:02 PM   | Microsoft Word 9 | 26   | (B                         |        |
| Documents            | Average_Time_of_Cancelled_Members_R              | 20/07/2012 4:02 PM   | Microsoft Word 9 | 27 1 | (B                         |        |
| 🚽 Music              | 👿 Bonus_Days.dot                                 | 21/07/2012 6:08 PM   | Microsoft Word 9 | 27   | (B                         |        |
| Pictures             | Bulk_Registration_Fees_Allocation.dot            | 20/07/2012 4:02 PM   | Microsoft Word 9 | 29 H | KB                         |        |
| 😸 Videos             | 🗑 Cancelled_Contracts.dot                        | 20/07/2012 4:02 PM   | Microsoft Word 9 | 26   | (B                         |        |
|                      | 🔟 Cash_Squads links.dot                          | 17/07/2014 3:59 PM   | Microsoft Word 9 | 36 H | (B                         |        |
| 👰 Computer           | Cash_Squads.dot                                  | 17/07/2014 3:56 PM   | Microsoft Word 9 | 36 I | (B                         |        |
| 🊢 Local Disk (C:)    | 🗑 Cash_Standard_Class.dot                        | 4/03/2013 8:59 AM    | Microsoft Word 9 | 31   | (B                         |        |
|                      | 🗑 Class_Outstanding_Accounts.dot                 | 1/03/2013 11:10 AM   | Microsoft Word 9 | 26   | (B                         |        |
| 👊 Network            | 🗑 Classes_Family_Loyalty.dot                     | 21/07/2012 6:08 PM   | Microsoft Word 9 | 25   | (B                         |        |
|                      | CLIENT INVOICE.DOT                               | 5/04/2013 2:30 PM    | Microsoft Word 9 | 56 I | (B                         |        |
|                      |  | 20/10/2014 0.00 ANA  | Microcoft Word 0 | 571  | /0                         |        |
| Filer                | name: Facility Booking Quote.dot                 |                      |                  | ~    | Word Template (*.dotx, *.d | lot) ∨ |
|                      |  |                      |                  |      | Open 🔽 Car                 | ncel   |



Select 'Get Links default Template and save in a specified location'. Enter the 'description' of the template this can be 'Quote Template' or another description in the 'Enter Template description' field.

| 5                      | Add New Templa  | ate 🛛 🗙                            |
|------------------------|---|------------------------------------|
| Type or br<br>C:\Links | rowse for File name and path to s<br>Modular Solutions\Links Templa | ave Template:<br>tes\Facility Book |
| 🔽 Get Li<br>En terTem  | nks default Template and save in<br>nplate description:             | n a specified location.            |
| Quote Te               | mplate  | ~ ~                                |
|                        | <b>√</b> 0K   | × Cancel                           |

Select 'ok' and the 'Quote Template' will appear.

To edit an existing quote template

Go to Admin> Letter> Templates and Select 'Facility Booking Quote' and Click 'Edit Template' and the Document will open in Microsoft Word. Make the required changes and save as normal.

| 8  | Links Letter Templ   | ates  | x   |
|--|--|---|-----|
| Links Letter Data Sources *     Name     Customer     Facility Booking Continuation     Facility Booking Quote     Facility     MemContract     Retention     StudentDetails | Template Description<br>Quote Template                               | File location<br>C-\Links Modular Solutions\Links Templates\Facility Booking Quote.do |     |
| Data Source Description:   |  |   |     |
|  | Add Template Edit Template Edit Template Edit Template Edit Template | emplate   | ose |



# To create a quote

Click the 'View/Edit Bookings' button from the enquiries windows.

| ts Enquiry 85   | - 🗆 X |
|---|-------|
| File  |       |
| Contact Details From TEST CLIENT  |       |
| C Casual Client ID: 1 View New Enquiry ID Enquiry Name Priority Status Greated                            |       |
| C Customer Name: TEST CLIENT + 85 School Swimming 1 Tentative 22/10/2015 9:29 AM                          |       |
| r Client  |       |
| Enquiry ID 85   |       |
| Detais Bookings Follow Up Correspondence  |       |
| Family Bookings - Testathe  |       |
| ViewEdit Bookings Clash with Englings Clash with Engling  |       |
|   |       |
| Facility Name Date Day From Time To Time Attended Pax Duration No. Periods Per Period Charge Service Name |       |
| P SUM POOL 28/10/2015 WE STOD AM IITOD AM NO U IZU 8 \$250.00 \$2,000.00 POOLHIRE                         |       |
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|   |       |
|   | Close |

Select the 'Quote' button in the bottom left of the screen

| 8  | Facility Booking 85  | x   |
|--|--|---|
| Date Booked:         Thu 22/10/201           Extensions         Booking Details           Major Event         C Cassal Use<br>C Customer         Booking Name:           Event         C Customer         Client Id:           Details         C Cert         Client Id:           Enquiry         Confirmed         Method:         C Invoice           C Tentative         Instructions:         Prime Usage:         Prime Usage: | 5 Booking ID 85 Ref  | # 176         Multiple Bookings         C End Date:         C Period:         Booking Type:         View Details            |
| Facility Name Date Day From Tin<br>▶ 50M Pool 28/10/2015 We 09:00 AM   | e To Time Attended Pax Duration (mins) No. Pe<br>11:00AM 0 120 8       | riods \$ Per Period Charge (\$) Service Name<br>250.00 2000.00 Pool Hire  |
| Adjustments     Other Book       Date     Amt       View Details     Add   | Setup/Packdown Apply Apply Apply Defaults ing Charge Details ne Qty Ho | Add Booking Cancel Edit Booking Deak Period Off Peak Period Setup/Packdown  |
| Credit Assets Staff Credit Amount Remai Tran ID  | Add Service Add Product Edit Product/Serv Payment Date Amount, \$      | ice Selected Booking Total \$: 2,000.00<br>Group Booking Total \$ 2000.00<br>Total Paid: \$ 0.00<br>Outstanding: \$ 2000.00 |
| Documents Quote Email Booki  | ng Change Payment Schedule >> Pay De                                   | posit Apply Changes Update Close  |



Enter the dates you wish to quote for (default is the date of the first and last booking lines chronologically). You will then be taken through to the quote creation screen.

| Facility Booking Quote - Date Range   | x      |
|---|--------|
| Select Date Range   |        |
| Only those Facility Bookings that are within the date range selected will appear on the Facility Booking Quote. | 1      |
| Please select the date range for the Facility Booking Quote:  |        |
| From Date : 28 OCT 2015 D   |        |
| To Date : 28 OCT 2015 D   |        |
|   |        |
| 🗸 ОК 🛛 🗙  | Cancel |

Click on the [...] and Select the relevant quote template, click 'OK'.

| 5           |               | Facility Booking Documents - 85   | × |
|-------------|---------------|---|---|
| Create Book | ing Quote     |   |   |
| Template:   | File Name:    | C:\Links Modular Solutions\Links Templates\Facility_booking_ouctedut Use Default Set As Default |   |
|             | Description:  | Quote   |   |
|             |               |   |   |
| Save As:    | File Path:    | C:\Links Modular Solutions\Bookings\\$5\  |   |
|             | File Name:    | 85_1_Quote.pdf  |   |
|             | Description:  | 85_1_Quote  |   |
|             | Invoice No:   | 85_1  |   |
|             | After Create: | € Save C Open C Email   |   |
|             |               | Create Cancel   |   |
|             |               | Close   |   |

#### Select Template

|   | Name  | File Name   | Is Default |
|---|-------|---|------------|
| • | Quote | C:\Links Modular Solutions\Links Templates\Facility_booking_quote.dot |            |
|   |       |   |            |
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|   |       |   |            |
|   |       |   |            |
|   | OK    | Add Template Cancel   |            |
|   |       |   |            |

You can then select to save, open or email the quote.



| 0          |               | Facility Booking Documents - 85  | - • × |
|------------|---------------|--|-------|
| Create Boo | cing Quote    |  |       |
| Template:  | File Name:    | C:\Links Modular Solutions\Links Templates\Facility_booking_quote.dot Use Default Set As Default |       |
|            | Description:  | Quote  |       |
|            |               |  |       |
| Save As:   | File Path:    | C:\Links Modular Solutions\Bookings\B5\  |       |
|            | File Name:    | 85_1_Quote.pdf   |       |
|            | Description:  | 85_1_Quote   |       |
|            | Invoice No:   | 85_1   |       |
|            | After Create: | ⊙ Save C Open C Email  |       |
|            |               | Create Cancel  |       |
|            |               |  |       |
|            |               | Close  |       |

If you choose to 'Save' it will save it to the 'Documents' section of the enquiry/booking based on the template you have setup for quotes.

| 8 | Facility Booking Documents - 85 |               |  |                |  |                            |                    |             |         |               |  |
|---|---------------------------------|---------------|--|----------------|--|----------------------------|--------------------|-------------|---------|---------------|--|
|   | Facility                        | Booking Docun | nents                                  |                |  |                            |                    |             |         |               |  |
|   |                                 | Description   | Folder                                 | File Name      | Template Folder                              | Template File Name         | Added              | Added<br>By | Updated | Updated<br>By |  |
|   | Þ                               | 85_1_Quote    | C:\Links Modular Solutions\Bookings\85 | 85_1_Quote.pdf | C: \Links Modular Solutions \Links Templates | Facility_booking_quote.dot | 22/10/2015 9:35 AM | STAFF, DEMO |         |               |  |

If you choose to 'Open' it will show a preview of the file based on the template you have setup for quotes and also save a copy in the 'Documents' section of the enquiry/booking.

| 22 Oct 2015  |   |                         |  |                      |   |                                  | Invois   | Client ID:          |
|--|---|-------------------------|--|----------------------|---|----------------------------------|--|---------------------|
|  |   |                         |  |                      |   |                                  | Invoice  | 2 NO: 85_           |
| BookingID: 85  |   |                         |  |                      |   |                                  |  |                     |
| TEST CLIENT  |   |                         |  |                      |   |                                  |  |                     |
| TEST CLIENT  |   |                         |  |                      |   |                                  |  |                     |
| NSW  |   |                         |  |                      |   |                                  |  |                     |
|  |   |                         |  |                      |   |                                  |  |                     |
| NSW  |   |                         |  |                      |   |                                  |  |                     |
| Dear TEST,   |   |                         |  |                      |   |                                  |  |                     |
|  |   |                         |  |                      |   |                                  |  |                     |
| Client Credit on Acco  | ount: \$0.00  |                         |  |                      |   |                                  |  |                     |
| Client Credit Used fo  | or this booking:  | Ş0.00                   |  |                      |   |                                  |  |                     |
| Please find below a  | quote for your  | hooking ma              | ade with L                                 | ocation <sup>.</sup> | 1   |                                  |  |                     |
| ricuse into below at   | quote for your  | booting in              | buc mare                                   | 0.000011             |   |                                  |  |                     |
| Booking particu  | ars   |                         |  |                      |   |                                  |  |                     |
| Booking Reference Number   | r 176   |                         |  |                      |   |                                  |  |                     |
| Event Description  | School Swimmin  | 5                       |  |                      |   |                                  |  |                     |
| Booking Status   | Tentative   |                         |  |                      |   |                                  |  |                     |
|  | Te treactive  |                         |  |                      |   |                                  |  |                     |
| Payment Arrangement  | Cash on Arrival   |                         |  |                      |   |                                  |  |                     |
| Payment Arrangement<br>Specified instructions<br>Phone number on file  | Cash on Arrival   |                         |  |                      |   |                                  |  |                     |
| Payment Arrangement<br>Specified instructions<br>Phone number on file<br>Booking Details   | Cash on Arrival   |                         |  |                      |   |                                  |  |                     |
| Payment Arrangement<br>Specified instructions<br>Phone number on file<br>Booking Details<br>Facility Booked  | Cash on Arrival   | From                    | То   | GST                  | Charges<br>Ex GST                         | Charges                          | Hourly<br>Rate   | PAX                 |
| Payment Arrangement<br>Specified instructions<br>Phone number on file<br>Booking Details<br>Facility Booked<br>SOM Pool  | Date 28 Oct 2015  | From<br>09:00 AM        | To<br>11:00 AM                             | G5T<br>\$181.82      | Charges<br>Ex GST<br>\$1<br>818.18        | Charges<br>\$2<br>000.00         | Hourly<br>Rate<br>\$1<br>000.00                              | PAX<br>0            |
| Experted Arragements<br>Section Internet<br>Booking Details<br>Facility Booking Details<br>South Pacit<br>Total Bookings: \$2<br>Other Bookings  | Cath on Arrival Cath on Arrival Date 28 Oct 2015 2 000.00 Charges                             | From<br>09:00 AM        | To<br>11:00 AM                             | GST<br>\$181.82      | Charges<br>Ex GST<br>\$1<br>818.18        | Charges<br>52<br>000.00          | Hourly<br>Rate<br>\$1<br>000.00<br>\$ per<br>hour            | PAX<br>0<br>Charges |
| Express Arrangement<br>Specifies instructions<br>Phone number on file<br>Booking Details<br>Tecling booked<br>SOM Peel<br>Total Bookings C<br>Additional Charges<br>Total Additional Charges   | Date           28 Oct 2015           2 000.00   | Fram<br>09:00 AM        | To<br>11:00 AM                             | G5T<br>\$181.82      | Charges<br>Ex G5T<br>\$1<br>818.18<br>Qty | Charges<br>52<br>000.00<br>Hours | Hourly<br>Rate<br>\$1<br>000.00<br>\$ per<br>hour            | PAX<br>0<br>Charges |
| Tayness Arragement<br>Specifies instructions<br>Phone number on file<br>Booking Details<br>Tacilly booked<br>30M Peel<br>Total Bookings: \$2<br>Other Bookings<br>Additional Charges<br>Total Additional Charges   | Date         Date           28 Oct 2015         28 Oct 2015           2000.00         Charges | From<br>09.00 AM        | To<br>11:00 AM                             | G5T<br>\$181.82      | Charges<br>Ex GST<br>51<br>818.18         | Charges<br>52<br>000.00<br>Hours | Hourly<br>Rate<br>51<br>000.00<br>Sper<br>hour               | PAX<br>0<br>Charges |
| Tayment Arrangement<br>Specified instructions<br>Phone number on file<br>Booking Details<br>Tecling booked<br>SOM Pool<br>Total Bookings: \$2<br>Other Booking C<br>Addisonal Charges<br>Total Additional Charges<br>Total Additional Charges  | Date         28 Oct 2015           28 Oct 2015         200.00           Charges               | From<br>09:00 AM        | To<br>11:00 AM                             | G5T<br>\$181.82      | Charges<br>Ex GST<br>51<br>818.18<br>Qty  | Charges<br>52<br>000.00<br>Hours | Hourhy<br>Rate<br>51<br>000.00<br>S per<br>hour<br>Receipt # | PAX<br>0<br>Charges |
| Tayness Arragement<br>Specifies instructions<br>Phone number on the<br>Booking Details<br>Tecility Booked<br>30M Peel<br>Total Bookings C<br>Additional Charges<br>Total Additional Charges  | Date         Date           28 Oct 2015         28 Oct 2015           20 000.00         00    | Prom<br>09:00 AM<br>Pay | To<br>11:00 AM                             | 657<br>5181.82       | Charges<br>Ex.GST<br>\$1<br>818.18<br>Qty | Charges<br>52<br>000.00          | Hourly<br>Rate<br>51<br>000.00<br>S per<br>hour<br>Receipt # | PAX<br>0<br>Charges |
| Total Payment Store<br>Total Payment Store<br>Payment Payment Paym | Dare         28 ort 2015           28 ort 2015         200.00           Charges               | From           09.00 AM | To<br>11:00 AM                             | 657<br>5181.82<br>t  | Charges<br>Ex G57<br>51<br>81818          | Charges 52<br>52 000.00          | Hourly<br>Rue<br>51<br>000.00                                | PAX<br>0<br>Charges |
| Tayness Arougement<br>Specifies instructions       Booking Details       Phone number on file       Booking Details       Total Bookings:       State Specifies       Other Booking C       Additional Charges       Total Additional Charges       Total Additional Charges       Total Additional Charges       Total Payment Details       Payment Data       Total Payments; \$0.1       Adjustments       Date  | Date         28 Oct 2015           28 Oct 2015         200.00           Charges               | From<br>09.00 AM<br>983 | To<br>11:00 AM<br>yment Amoun              | 657<br>5181.82<br>it | Charges<br>Es G51<br>51818<br>025y        | Charges<br>52<br>000.00<br>Hours | Hourly<br>Rate<br>51<br>000.00                               | PAX<br>0<br>Charges |
| Total Payment Details<br>Payment Details<br>Participa State of the<br>Participa State of the<br>Participa State of the<br>Total Bookings: \$2<br>Other Booking C<br>Additional Charges<br>Total Additional Cha<br>Payment Details<br>Payment Details<br>Total Payments; \$0.0<br>Adjustments<br>Date   | Date         28 oct 2015           28 oct 2015         2000.00           Charges              | Prom<br>09:00 AM<br>Pay | To<br>11:00 AM<br>yment Amour<br>Adjustmen | 637<br>5181.82<br>it | Charges<br>8: 637<br>51<br>81818<br>Qpy   | Charges 52<br>000.00             | Hourly<br>Bate<br>Sper<br>hour<br>Receipt #                  | PAX<br>0<br>Charges |



If you choose 'Email' it will create a PDF of the quote based on your template and email it using the below screen.

| 8 |         | Facility Booking Documents - 85 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|---|---------|---------------------------------|---|----------------|----------------------------------|---------------|----------------------------|-----------------------|-----------------|---------|---------------|--------------------|--|--|
|   | acility | Booking Docu                    | iments                                    |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
| [ |         | Description                     | Folder                                    | File Name      | Template Folder                  |               | Template File Name         | Added                 | Added<br>By     | Updated | Updated<br>By | Attach<br>To Email |  |  |
|   | Þ       | 85_3_Quote                      | C: \Links Modular Solutions\Bookings\85   | 85_3_Quote.pdf | C: \Links Modular Solutions \Lin | nks Templates | Facility_booking_quote.dot | 22/10/2015 9:42 AM    | STAFF, DEMO     |         |               | <b>V</b>           |  |  |
|   |         | 85_2_Quote                      | C:\Links Modular Solutions\Bookings\85    | 85_2_Quote.pdf | C:\Links Modular Solutions\Lin   | nks Templates | Facility_booking_quote.dot | 22/10/2015 9:36 AM    | STAFF, DEMO     |         |               |                    |  |  |
|   |         | 85_1_Quote                      | C: \Links Modular Solutions\Bookings\85   | 85_1_Quote.pdf | C:\Links Modular Solutions\Lin   | nks Templates | Facility_booking_quote.dot | 22/10/2015 9:35 AM    | STAFF, DEMO     |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
| l | _       |                                 | Г Г                                       | 1              |                                  |               | G. Sava                    | Attachmente te Exter  | al De sumente l | Dath    |               |                    |  |  |
|   |         | Add File                        | Open File                                 | Delete File    | Send Email                       |               | C Link.                    | Attachments to Source | e Path          |         | Invoice Sent  |                    |  |  |
| 9 | end Er  | nail                            |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   | E       | mail To:                        |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         | cc:                             |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         | BCC:                            |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   | Attac   | hments: C·V                     | Links Modular, Solutions\Rookings\85\85_3 | Quote odf      |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         | 0.6                             |   | _Quotespan     |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         | . –                             |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   | 5       | Subject:                        |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   | M       | essage:                         |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               | Send                       | Cancel                |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               |                    |  |  |
|   |         |                                 |   |                |                                  |               |                            |                       |                 |         |               | Close              |  |  |

#### Facility Follow up Screen and Report

Follow ups for enquiries can be entered within the New Enquiry screen. POS> Facility> New Enquiry>Follow Up tab.

#### Entering a Follow Up

A new follow up can be entered under the 'Follow Up' tab when in an enquiry.

| 0   |   |      |     | Enquiry | 85     |             |                 |          |           |                    |
|---|---|------|-----|---------|--------|-------------|-----------------|----------|-----------|--------------------|
| File  |   |      |     |         |        |             |                 |          |           |                    |
| Contact Details                                   |   |      |     |         | From 1 | TEST CLIENT |                 |          |           |                    |
| O Casual Client ID: 1                             |   | View | New |         |        | Enquiry ID  | Enquiry Name    | Priority | Status    | Created            |
| C Customer Name: TEST CLIENT                      |   |      |     |         | •      | 85          | School Swimming | 1        | lentative | 22/10/2015 9:29 AM |
| <ul> <li>Client</li> </ul>                        |   |      |     |         |        |             |                 |          |           |                    |
| Enquiry ID 85                                     |   |      |     |         |        |             |                 |          |           |                    |
| Details Bookings Follow Up Correspondence         |   |      |     |         |        |             |                 |          |           |                    |
|   | _ |      |     |         |        |             |                 |          |           |                    |
| Follow Up Details                                 |   |      |     |         |        |             |                 |          |           |                    |
| Follow Up Required? 🔽                             |   |      |     |         |        |             |                 |          |           |                    |
| Priority: 1                                       |   |      |     |         |        |             |                 |          |           |                    |
| Method: Email 💌                                   |   |      |     |         |        |             |                 |          |           |                    |
| Reason: Confirm Dates                             |   |      |     |         |        |             |                 |          |           |                    |
| By Date: 23/10/2015 💌                             |   |      |     |         |        |             |                 |          |           |                    |
| Staff Code: 1                                     |   |      |     |         |        |             |                 |          |           |                    |
| STAFF, DEMO<br>Comments:                          |   |      |     |         |        |             |                 |          |           |                    |
| Need to confirm date and happy with quote to book |   |      |     |         |        |             |                 |          |           |                    |
|   |   |      |     |         |        |             |                 |          |           |                    |
|   |   |      |     |         |        |             |                 |          |           |                    |
|   |   |      |     |         |        |             |                 |          |           |                    |
| Save Cancel                                       |   |      |     |         |        |             |                 |          |           |                    |



# Viewing a Follow Up

When you are in an enquiry, the follow up can be viewed in the 'Follow Up' tab.

| D,   |                            |              |                    |                   |               |            |             |                 | Enquiry     | 85       |                    |                                 |                   |                      |                               |         |
|------|----------------------------|--------------|--------------------|-------------------|---------------|------------|-------------|-----------------|-------------|----------|--------------------|---------------------------------|-------------------|----------------------|-------------------------------|---------|
| File |                            |              |                    |                   |               |            |             |                 |             |          |                    |                                 |                   |                      |                               |         |
| Co   | ntact [                    | Details      |                    |                   |               |            |             |                 |             | From 1   | <b>FEST CLIENT</b> |                                 |                   |                      |                               |         |
| 000  | Casual<br>Custon<br>Client | ner          | Client ID<br>Name: | : 1<br>TEST CLIEN | <b>л</b> т    |            | View        | New             |             | Þ        | Enquiry ID<br>85   | Enquiry Name<br>School Swimming | Priority<br>1     | Status<br>Tentative  | Created<br>22/10/2015 9:29 AM |         |
| En   | quiry I                    | D 85         |                    |                   |               |            |             |                 |             |          |                    |                                 |                   |                      |                               |         |
| De   | etails   E                 | Bookings Fo  | llow Up Cor        | respondence       |               |            |             |                 |             |          |                    |                                 |                   |                      |                               |         |
|      | Enqui                      | iry Follow U | ps                 |                   |               |            |             |                 |             |          |                    |                                 | Follow U          | p Details            |                               |         |
|      | Ne                         | w Follow Up  |                    | Show              | w All For TES | T CLIENT   |             |                 |             |          |                    |                                 | Rec               | quired: Yes          | 5                             |         |
|      |                            | Required     | Priority           | Method            | Reason        | By Date    | Staff Name  | Comments        |             |          |                    |                                 | P                 | riority: 1           |                               |         |
|      | Þ                          | Yes          | 1                  | Email             | Confirm Dates | 23/10/2015 | STAFF, DEMO | Need to confirm | date and ha | ppy with | quote to book      |                                 | M                 | ethod: Em            | ail                           |         |
|      |                            |              |                    |                   |               |            |             |                 |             |          |                    |                                 | Re                | ason: Co             | nfirm Dates                   |         |
|      |                            |              |                    |                   |               |            |             |                 |             |          |                    |                                 | Ву                | Date: 23             | /10/2015                      |         |
|      |                            |              |                    |                   |               |            |             |                 |             |          |                    |                                 | Staff             | Name: ST             | AFF, DEMO                     |         |
|      |                            |              |                    |                   |               |            |             |                 |             |          |                    |                                 | Commen<br>Need to | nts:<br>confirm date | e and happy with quote        | to book |
|      |                            |              |                    |                   |               |            |             |                 |             |          |                    |                                 |                   | Cor                  | tact Made                     |         |

You can show all enquiry follow ups for that Client/Customer by checking the 'Show All' option.

| ۵,   |           |            |              |             |               |            |             |                    | Enquiry     | 85       |               |                 |          |           |                    |
|------|-----------|------------|--------------|-------------|---------------|------------|-------------|--------------------|-------------|----------|---------------|-----------------|----------|-----------|--------------------|
| File |           |            |              |             |               |            |             |                    |             |          |               |                 |          |           |                    |
| C    | ntact De  | tails      |              |             |               |            |             |                    |             | From 1   | EST CLIENT    |                 |          |           |                    |
| С    | Casual    |            | Client ID:   | 1           |               | 1          | View        | New                |             |          | Enquiry ID    | Enquiry Name    | Priority | Status    | Created            |
| C    | Custome   | r          | Circle 10.   |             | -             |            | view        |                    |             | •        | 85            | School Swimming | 1        | Tentative | 22/10/2015 9:29 AM |
| G    | Client    |            | Name:        | JIEST CLIEF | 41            |            |             |                    |             |          |               |                 |          |           |                    |
|      | enene     |            |              |             |               |            |             |                    |             |          |               |                 |          |           |                    |
| E    | quiry ID  | 85         |              |             |               |            |             |                    |             |          |               |                 |          |           |                    |
| D    | etails Bo | iokings Fo | llow Up Corr | espondence  |               |            |             |                    |             |          |               |                 |          |           |                    |
|      |           |            |              |             |               |            |             |                    |             |          |               |                 |          |           |                    |
|      | Enquiry   | y Follow U | ps           |             | _             |            |             |                    |             |          |               |                 |          |           |                    |
|      | New       | Follow Up  |              | 🔽 Shov      | v All For TES | T CLIENT   |             |                    |             |          |               |                 |          |           |                    |
|      |           | Pequired   | Priority     | Method      | Peacon        | By Date    | Staff Name  | Comments           |             |          |               |                 |          |           |                    |
|      | •         | Yes        | 1            | Email       | Confirm Dates | 23/10/2015 | STAFF, DEMO | Need to confirm of | date and ha | oov with | auote to book |                 |          |           |                    |
|      |           |            | -            |             |               |            |             |                    |             |          |               |                 |          |           |                    |

Enquiry Manager

POS> Facility> Enquiry Manager

Additionally you can view Follow Up lists under Find Enquiry for 'My Follow ups'.

| Follow | Ups 🔽         | My Follow Ups             | erdue Follow Ups |                         |                       |          |                      |                                |        |                           |              |
|--------|---------------|---------------------------|------------------|-------------------------|-----------------------|----------|----------------------|--------------------------------|--------|---------------------------|--------------|
|        | Enquiry<br>ID | Enquiry Name              | Contact<br>Type  | Contact Details         | Follow Up<br>Required | Priority | Follow Up<br>By Date | Staff Name                     | Method | Reason                    | Comments     |
| •      | 45            | Magic Basketball Training | Client           | MAGIC JUNIOR BASKETBALL | Yes                   | 1        | 16/05/2015           | CUSTOMER SERVICE MANAGER, LISA | Email  | Booking Enquiry Confirmed | Enquiry has  |
|        | 45            | Magic Basketball Training | Client           | MAGIC JUNIOR BASKETBALL | Yes                   | 1        | 16/05/2015           | SERVICE, CUSTOMER              | Email  | Booking Enquiry Confirmed | Booking has  |
|        | 42            | Elite Training Session    | Client           | ELITE                   | Yes                   | 1        | 2/06/2015            | TRAINER, TRAINER               | Email  | DD Recovery               | Follow up O  |
|        | 42            | Elite Training Session    | Client           | ELITE                   | Yes                   | 1        | 9/06/2015            | TRAINER, TRAINER               | Email  | Booking Enquiry Confirmed | Please confi |
| 4      |               |                           |                  |                         |                       |          |                      |                                |        |                           | ) b          |

Or 'Overdue Follow ups'.



| Follow | Ups 🗌         | My Follow Ups 🗸 Ove       | erdue Follow Ups | >                       |                       |          |                      |                                |        |                           |             |
|--------|---------------|---------------------------|------------------|-------------------------|-----------------------|----------|----------------------|--------------------------------|--------|---------------------------|-------------|
|        | Enquiry<br>ID | Enquiry Name              | Contact<br>Type  | Contact Details         | Follow Up<br>Required | Priority | Follow Up<br>By Date | Staff Name                     | Method | Reason                    | Comments    |
| Þ      | 45            | Magic Basketball Training | Client           | MAGIC JUNIOR BASKETBALL | Yes                   | 1        | 16/05/2015           | CUSTOMER SERVICE MANAGER, LISA | Email  | Booking Enquiry Confirmed | Enquiry has |
|        | 45            | Magic Basketball Training | Client           | MAGIC JUNIOR BASKETBALL | Yes                   | 1        | 16/05/2015           | SERVICE, CUSTOMER              | Email  | Booking Enquiry Confirmed | Booking has |
|        |               |                           |                  |                         |                       |          |                      |                                |        |                           |             |
|        |               |                           |                  |                         |                       |          |                      |                                |        |                           |             |
| 4      |               |                           |                  |                         |                       |          |                      |                                |        |                           | ) i         |

You are able to print and/or export for follow ups.

| Fol | ow Ups        | My Follow Ups 🛛 Ove       | erdue Follow Ups |                         |                       |          |                      |                                |        |                           |             |
|-----|---------------|---------------------------|------------------|-------------------------|-----------------------|----------|----------------------|--------------------------------|--------|---------------------------|-------------|
|     | Enquiry<br>ID | Enquiry Name              | Contact<br>Type  | Contact Details         | Follow Up<br>Required | Priority | Follow Up<br>By Date | Staff Name                     | Method | Reason                    | Comments    |
| ►   | 45            | Magic Basketball Training | Client           | MAGIC JUNIOR BASKETBALL | Yes                   | 1        | 16/05/2015           | CUSTOMER SERVICE MANAGER, LISA | Email  | Booking Enquiry Confirmed | Enquiry has |
|     | 45            | Magic Basketball Training | Client           | MAGIC JUNIOR BASKETBALL | Yes                   | 1        | 16/05/2015           | SERVICE, CUSTOMER              | Email  | Booking Enquiry Confirmed | Booking has |
|     |               |                           |                  |                         |                       |          |                      |                                |        |                           |             |
|     |               |                           |                  |                         |                       |          |                      |                                |        |                           |             |
| •   |               |                           |                  |                         |                       |          |                      |                                |        |                           | •           |
|     |               |                           |                  |                         |                       |          |                      |                                |        | Print E                   | xport       |

The Export will appear like the below example.

| 4 | А          | В               | С            | D               | E                  | F                   | G                    | н      | I.            | J        | К   |
|---|------------|-----------------|--------------|-----------------|--------------------|---------------------|----------------------|--------|---------------|----------|---|
| 1 | Enquiry ID | Enquiry Name    | Contact Type | Contact Details | Follow Up Required | Follow Up Date Time | Follow Up Staff Name | Method | Reason        | Priority | Comment   |
| 2 | 85         | School Swimming | Client       | TEST CLIENT     | No                 | 23/10/2015          | STAFF DEMO           | Email  | Confirm Dates | 1        | Need to confirm date and happy with quote to book |
| 3 |            |                 |              |                 |                    |                     |                      |        |               |          |   |

The Printed option will appear like the below example.

Test 3 Location 1

| Enquiry Tracking Report-Follow Ups                           |
|--|
| Search Filter: Staff H(1)From (22 Sep 2015) To(25 0 ct 2015) |

| Enqu:<br>D | ry Enquiry Name    | ContactType | ContactDetails | Folby Up<br>Required | Follow Up<br>Date Tinte | Follow Up<br>StaffName | M ethod | Reason        | P riority | Comment   |
|------------|--------------------|-------------|----------------|----------------------|-------------------------|------------------------|---------|---------------|-----------|---|
| 85         | School<br>Swimming | C lient     | TEST CLENT     | N o                  | 2340⁄201<br>5           | STAFF,<br>DEM O        | Email   | Confirm Dates | 1         | Need to<br>confim<br>date and<br>happy<br>with quote<br>to book |



# **Facility Document Storage**

You can now attach or link documents to a Facility booking or enquiry. For example, floor plans for a booking.

You will first need to create an External Document Path through Admin>Site>Site Set up> General Tab.

| 8                              |   | Site Setup                |               | x                           |
|--------------------------------|---|---------------------------|---------------|-----------------------------|
| Restorations                   | SMS   | SMTP                      | Regional      | System                      |
| General                        | Auditing/Other  | Memberships&VP            | Classes       | Other Sites                 |
| Site Details                   | er Emergency / Health E<br>sses<br>Jation<br>[200.00<br>ards/customer:: 1<br>int<br>is<br>iards | Petails                   | Photo C       | ompression<br>100 %<br>90 % |
| Disable picture<br>External pi | capture<br>cture path:  |                           |               |                             |
| External Docur                 | nents path: C:\Links  | Modular Solutions\Booki   | ngs           |                             |
|                                | Save A  | Attachments to External [ | ocuments Path |                             |
|                                | C Link Al   | tachments to Source Pa    | th            |                             |
|                                |   |                           | <b>√</b> 0K   | X Cancel                    |

Documents can be accessed via the Enquiries screen below.

| 5               |   |                            |                                |          |                  |         |            |      | Eng       | uirv 75     |                 |              |  |                     |                     |                               |
|-----------------|---|----------------------------|--------------------------------|----------|------------------|---------|------------|------|-----------|-------------|-----------------|--------------|--|---------------------|---------------------|-------------------------------|
| File<br>CC<br>C | ntact De<br>Casual<br>Custome<br>Client | tails<br>Clia              | ent ID: 5<br>Name: MAGI        | C JUNIOF | <br>R BASKETBALL | 1       | View       | N    | ew        | From        | MAG<br>En<br>75 | IC JUNIOR BA | <b>SKETBALL</b><br>inquiry Name<br>agic Junior Baske | Priority<br>tball 1 | Status<br>Tentative | Created<br>17/09/2015 3:04 PM |
| Er              | etails Bo                               | 75<br>okings Follow Up     | Correspond                     | ence     |                  |         |            |      |           |             |                 |              |  |                     |                     |                               |
|                 | Enquiry<br>Vac                          | Bookings - Ten<br>ancies V | <b>tative</b><br>iew/Edit Book | ings     | Convert to Bo    | okings  | View Sched | uler | Documents | ;           |                 | Av           | ailable <mark>Clash w</mark>                         | ithBooking Cla      | ish with Enqu       | iry                           |
|                 |   | Facility Name              | Date                           | Day      | From Time        | To Time | Attended   | Pax  | Duration  | No. Periods |                 | Per Period   | Charge !   | Service Name        |                     |                               |
|                 | •                                       | Court 1                    | 21/09/2015                     | Mo       | 4:30 PM          | 5:30 PM | No         | (    | ) 60      |             | 4               | \$15.00      | \$60.00  | ourts Hire          |                     |                               |
|                 |   | Court 1                    | 24/09/2015                     | Th       | 4:30 PM          | 5:30 PM | No         | (    | 60        |             | 4               | \$15.00      | \$60.00  | ourts Hire          |                     |                               |

When viewing the documents, you will see a list of already attached documents. To attach a new document click the 'Add File' button.



| C | 3.       |               |        |              |                    |                       | Faci       | lity Booking | g Document | ts - 82       |   | - 🗆 X   |
|---|----------|---------------|--------|--------------|--------------------|-----------------------|------------|--------------|------------|---------------|---|---------|
|   | Facility | Booking Docur | nents  |              |                    |                       |            |              |            |               |   |         |
|   |          | Description   | Folder | File<br>Name | Template<br>Folder | Template<br>File Name | Added      | Added<br>By  | Updated    | Updated<br>By | Attach<br>To Email                          |         |
|   |          |               |        |              |                    |                       |            |              |            |               |   |         |
|   |          |               |        |              |                    |                       |            |              |            |               |   |         |
|   |          |               |        |              |                    |                       |            |              |            |               |   |         |
|   |          |               |        |              |                    |                       |            |              |            |               |   |         |
|   |          |               | 1      |              | 1                  | - E                   |            | 1            |            | 6             | Save Attachments to External Documents Path |         |
|   |          | Add File      |        | Upen ⊦ile    | Delete F           | -ile                  | Send Email |              |            | č             | C Link Attachments to Source Path           | ce Sent |

Select the file you wish to attach.

| 8                     |                                | Open               |                  |      |                  | x        |
|-----------------------|--------------------------------|--------------------|------------------|------|------------------|----------|
| € 🕘 ▾ ↑ 📑 ኑ Libra     | aries 🕨 Documents 🕨            |                    |                  | ~ ¢  | Search Documents | Q        |
| Organize 👻 New folder |                                |                    |                  |      | · · ·            | 0        |
| ☆ Favorites           | Name                           | Date modified      | Туре             | Size |                  |          |
| Desktop               | 퉬 SQL Server Management Studio | 19/10/2015 11:35   | File folder      |      |                  |          |
| 🐌 Downloads           | January Stardock               | 24/10/2013 10:39   | File folder      |      |                  |          |
| Recent places         | 퉬 Visual Studio 2005           | 3/02/2015 3:16 PM  | File folder      |      |                  |          |
|                       | Test Attatchement.docx         | 21/10/2015 6:28 PM | Microsoft Word D | 0    | КВ               |          |
| 📜 Libraries           |                                |                    |                  |      |                  |          |
| Documents             |                                |                    |                  |      |                  |          |
| Music                 |                                |                    |                  |      |                  |          |
| Videos                |                                |                    |                  |      |                  |          |
| 1 Videos              |                                |                    |                  |      |                  |          |
| 🖳 Computer            |                                |                    |                  |      |                  |          |
| Local Disk (C:)       |                                |                    |                  |      |                  |          |
|                       |                                |                    |                  |      |                  |          |
| 📬 Network             |                                |                    |                  |      |                  |          |
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|                       |                                |                    |                  |      | Open Cancel      |          |
|                       |                                |                    |                  |      |                  | зđ       |

It will save a new record in the default file-path with a sub-folder of the Booking/Enquiry ID. In the example below the Booking/Enquiry ID is 82.

| в,  |                      |  |                        | Fac                | cility Booking        | Documents - 82     |                |               |             |                    |  |
|-----|----------------------|--|------------------------|--------------------|-----------------------|--------------------|----------------|---------------|-------------|--------------------|--|
| Fac | ility Booking Docume | nts                                    |                        |                    |                       |                    |                |               |             |                    |  |
|     | Description          | Folder                                 | File Name              | Template<br>Folder | Template<br>File Name | Added              | Added          | Updated       | Updated     | Attach<br>To Email |  |
| Þ   | Test Attatchement    | C:\Links Modular Solutions\Bookings\82 | Test Attatchement.docx |                    |                       | 21/10/2015 6:29 PM | STAFF, DEMO    |               |             | Г                  |  |
|     |                      |  |                        |                    |                       |                    |                |               |             |                    |  |
|     |                      |  |                        |                    |                       |                    |                |               |             |                    |  |
|     |                      |  |                        |                    |                       |                    |                |               |             |                    |  |
|     |                      |  |                        |                    |                       |                    |                |               |             |                    |  |
|     | Add File             | Open File Del                          | ete File Si            | end Email          |                       | C Save             | Attachments to | External Docu | iments Path | Invoice Sent       |  |



# Members Changes

# Authorisation on Membership Expiry

When selecting Override expiry in the Members module, there is now security restrictions on which staff are able to complete this. This is turned on in Security Groups under the Members tab> Modify a Customer Account.

If a staff member doesn't have access based on their security level, when selecting the 'Override Expiry' button, an authorisation screen will appear and a staff member with the required level of access will need to enter their Links Staff Code and password.

| 0                 |             | Ν                      | Membership Co      | ntracts \\ Cus    | tomer Numbe | r - 103                      |                    |
|-------------------|-------------|------------------------|--------------------|-------------------|-------------|------------------------------|--------------------|
| CustomerID:       | 103         | + Nev                  | V Name: BOWON      |                   | CPOOTO      | F                            | Personal Details   |
|                   | ID          | Description            |                    | Date Started      | Expiry Date | Status                       | Marketing Info     |
|                   | 3           | Membership 1           |                    | 7 Apr 2016        |             | Active                       | Create New         |
|                   |             |                        |                    |                   |             |                              | consult.link       |
| j j               | ( Currer    | nt Only 🔿 Include Hist | ory                |                   |             |                              |                    |
| - Contract ID=3   |             |                        |                    | A                 | ctive       |                              | View & Update      |
| Data              | Charland    | 7 APD 2016             | Pay at PDS:        | \$ 0.00           | ĩ           |                              | Membership details |
| Date              | staneu.     | 17 AFN 2010            | Direct Dahit       |                   | 7           |                              | Changes            |
| Current Exp       | oiry Date:  |                        | TOTAL D.           |                   | '<br>T      |                              | Override Expiry    |
| Suspension Lim    | nit (Days): | 14                     | TUTAL Balance      | s  100.00         | )           |                              | Visits             |
| Suspension Day    | (s) Used:   | 0                      | Next Paument Date: | 01 4444 2010      |             |                              | Suspension         |
| Total Bonus Day(s | s) Added:   | 0                      | Now Faymerk Plate. | UT MAY 2016       |             |                              | Bonus Days         |
|                   | Ref:        |                        | Detail             | E Direct Debit Pa | ayment      |                              | Financial          |
| Cales             | Person      | Autho                  | prisation require  | ed x              |             |                              | Messages           |
| 5466              | reson       | 710010                 |                    |                   |             |                              | Payment Method     |
| Co                | insultant   | Chaff Cardan           |                    |                   |             |                              | Marketing          |
| C                 | omment      | Starr Lode:            | 1                  |                   |             | ^                            |                    |
| tom               | natimize    | Password:              |                    |                   | Lastille    | Annual 8004/2016 3-17-22 EMA | ·                  |
| Setup Letter      |             |                        | ✓ OK               | × Cancel          | ✓ 0K        | × Cancel R                   | Apply              |



# Classes Changes

### Class Visual Scheduler Screen Size Auto fill and New Look

The Visual Scheduler will now re-size anywhere from 1024 x 768 screen resolution to full screen.

|   |                                   |                                   | Visual Scheduler - A              | All Class Types               |                       |                                   | - 0 X   |
|---|-----------------------------------|-----------------------------------|-----------------------------------|-------------------------------|-----------------------|-----------------------------------|---------|
| Tuesday<br>20 Oct 2015                                    | Wednesday<br>21 Oct 2015          | Thursday<br>22 Oct 2015           | Friday<br>23 Oct 2015             | Saturday<br>24 Oct 2015       | Sunday<br>25 Oct 2015 | Monday<br>26 Oct 2015             | -       |
| 9:00 AM-9:30 AM<br>Penguin 4                              | 9:00 AM-9:30 AM<br>Penguin 4      | 9:00 AM-9:30 AM<br>Penguin 4      | 9:00 AM-9:30 AM<br>Penguin 4      | 9:00 AM-9:30 AM<br>Dolphin 5  |                       | 9:00 AM-9:30 AM<br>Starfish 4     |         |
| 9:30 AM-10:00 AM<br>Tadpole 3                             | 9:30 AM-10:00 AM<br>Starfish 4    | 9:00 AM-9:30 AM<br>Periwinkle 4   | 9:00 AM-9:30 AM<br>Periwinkle 4   | 9:00 AM-9:30 AM<br>Penguin 4  |                       | 9:00 AM-9:30 AM<br>Tadpole 4      |         |
| 10:00 AM-10:30 AM<br>Penguin 4                            | 9:30 AM-10:00 AM<br>Tadpole 4     | 9:00 AM-9:30 AM<br>Tadpole 4      | 9:00 AM-9:30 AM<br>Starfish 4     | 9:00 AM-9:30 AM<br>Seahorse 5 |                       | 9:30 AM-10:00 AM<br>Penguin 4     |         |
| 10:00 AM-10:30 AM<br>Periwinkle 4                         | 10:00 AM-10:30 AM<br>Periwinkle 4 | 9:00 AM-9:30 AM<br>Tadpole 4      | 9:00 AM-9:30 AM<br>Tadpole 4      | 9:00 AM-9:30 AM<br>Seal 5     |                       | 10:00 AM-10:30 AM<br>Penguin 4    |         |
| 10:00 AM-10:30 AM<br>Starfish 4                           | 10:00 AM-10:30 AM<br>Starfish 4   | 9:30 AM-10:00 AM<br>Starfish 4    | 9:00 AM-9:30 AM<br>Tadpole 3      | 9:00 AM-9:30 AM<br>Starfish 4 |                       | 10:00 AM-10:30 AM<br>Periwinkle 4 |         |
| 10:30 AM-11:00 AM<br>Periwinkle 4                         | 10:00 AM-10:30 AM<br>Swordfish 4  | 10:00 AM-10:30 AM<br>Periwinkle 4 | 9:30 AM-10:00 AM<br>Penguin 4     | 9:00 AM-9:30 AM<br>Stingray 5 |                       | 10:00 AM-10:30 AM<br>Starfish 4   |         |
| 10:30 AM-11:00 AM<br>Swordfish 4                          | 11:00 AM-11:30 AM<br>Swordfish 4  | 10:00 AM-10:30 AM<br>Swordfish 4  | 9:30 AM-10:00 AM<br>Starfish 4    | 9:00 AM-9:30 AM<br>Tadpole 4  |                       | 10:30 AM-11:00 AM<br>Periwinkle 4 |         |
| 11:00 AM-11:30 AM<br>Swordfish 4                          | 3:00 PM-3:30 PM<br>Seahorse 5     | 3:00 PM-3:30 PM<br>Frog 5         | 10:00 AM-10:30 AM<br>Periwinkle 4 | 9:30 AM-10:00 AM<br>Penguin 3 |                       | 10:30 AM-11:00 AM<br>Swordfish 4  | *       |
| Date: 20 OCT 201  | 5 0 - +                           | Fixed Date Days: <                | <all>&gt; Min.</all>              | Vac:                          | Age Filter<br>From:   | Starting Time                     |         |
| Class Type  | Level Teacher                     | Area                              | No Filters                        | Reset Filters                 | To:                   | To:                               |         |
| Double-click action—                                      | o Maya kaakian                    | Options                           | , deteil                          | Email                         | Daily                 | Students CI                       | lose    |
| <ul> <li>Make booking</li> <li>Booking manager</li> </ul> | Class Detail                      | ⊂ Student de                      | tails                             | Print                         | Refresh               |                                   |         |
| 9: 占 🜌 🚞  | 9 🍢 🌸 🗵                           | <u>a e </u>                       |                                   |                               |                       |                                   | 5.58 PM |

### Classes Number of skills that can be attached to a Class Level

The number of skills that can be attached to a Class Level is no longer limited to 21 skills. You are able to enter any amount of skills required.

| 🖎 Associate  | ed skills for level Turtles 🛛 🗕 🗖 🗙 |
|--|-------------------------------------|
| Skills for Level Skills  1. Blow Bubbles  2. Safe Slide In Entry  3. Assisted Front Float  4. Assisted Back Float  5. Wet Own Hair  6. Kick Aidded  7. Demonstrate Torepedo Arms  8. Collect Object From the Bottom of t | Add Skill Skill: Long description:  |
|  | Add New Skill Add Clear             |



# Complete Cancellation of Student booking now shows in the Audit Log

You are now able to use the Audit log to view a list of all student bookings that have been completely cancelled from a class.

When staff use the 'Completely Cancel Booking' option when cancelling a student. There is no history on the Student for this lesson.

| 3                                    |                     | Cancel Stude                | ent Booking:         | 5                             |                     | ×     |
|--------------------------------------|---------------------|-----------------------------|----------------------|-------------------------------|---------------------|-------|
| Student: 95                          | TILLY JONES         |                             |                      | Famil                         | ly Details          |       |
| <ul> <li>Standard Classes</li> </ul> | C Squads            | C Holiday Programs          |                      |                               |                     |       |
| Class Day                            | Time Area           | Level Start Date            | Cease Date           | Next Class C                  | Cost,\$ Last Attend |       |
| LIS Friday                           | 09:30:00 TP 2       | Starfish 23/10/2015         |                      | 23/10/2015 (                  | 62.00               |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
| C Select All                         |                     |                             |                      |                               | -1                  |       |
| Fees : \$31.00                       |                     | Last date the student w     | vill attend: 23      | DCT 2015 D                    |                     |       |
|                                      |                     | Return to Far               | nily Credit: \$  0.0 | 0                             |                     |       |
|                                      |                     | Heason t                    | o Lancel:            | Conselectedor Consered De est |                     |       |
| Consultant: 1                        |                     |                             | 10                   | Completely Caricel Book       | king                |       |
| IDEMU                                | 21 Oct 2015 6:47 PM | 10                          |                      | ✓ OK                          | × Cancel            |       |
|                                      |                     |                             |                      |                               |                     |       |
| a                                    |                     | Student De                  | tails                |                               |                     | x     |
| Student: 95                          | JONES, TILLY        |                             | Sh                   | udent Details                 |                     |       |
| Family: 33                           | JONES, SANDE        | A                           |                      | amilu Details D               |                     |       |
| Proting Law 1                        | i un les ie         |                             |                      |                               | ione.               |       |
| Bookings   Attendance                | Class Tupe          | Jebit Uverride   Message/Li | ind A                | Registrations                 | Comment             | - 1   |
| Day                                  | Liass Type   Leve   | a jotant jo                 |                      | ea reachei                    | Comment             |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
| <                                    |                     | Ш                           |                      |                               |                     | >     |
| C Current only                       | History             |                             |                      |                               |                     |       |
|                                      |                     |                             |                      |                               |                     |       |
|                                      | Setup .             | 1                           | -58-                 |                               | *                   |       |
| Print card                           | Letter              |                             | Save                 | Delete Clea                   | r Clone I           | Close |
|                                      |                     |                             |                      |                               |                     |       |

There is no record of cancellation on Cancellation Report



| <b>B</b> .            | Class Cancellation Reports  |        | X |
|-----------------------|---|--------|---|
| Select Date(s)        |   | Print  |   |
|                       |   | Export |   |
| Select Class Type     | Select Reason(s)       Pay Type       WIM       TP         Moving | Graph  |   |
|                       | LinksReporting  | Chur   |   |
| Select Cl             | No information matched your selection criteria.                   |        |   |
| ✓ Dolpl<br>✓ Frog     | ОК  | -      |   |
| Periwinkle            | ✓ JONES, BRETT<br>✓ SMITH, JULIE                                  |        |   |
| Select All            | Select All  |        |   |
| C Reason<br>C Teacher | C Details are required  |        |   |

However, it now shows in the Audit Log.

| 0  | Audit Log   | x               |
|--|---|-----------------|
| Filter options         D           From:         14 OCT 2015         D           Ta:         [21 OCT 2015         D  | Dieplay Only:   | ∧<br>✓<br>Apply |
| Date         Type         Description           21 OCT 20.         6.49 PM         CLASSES COMPETENCE           21 OCT 20         6.41 PM         CLASSES - COMPETENCE | Cale     Old/Make     Non-Make       YCALKELLED:     Student 895:Node     STAFF, DEMO     0     0     Student booking completely cancel       TCPINCLLED:     Student Booking     Student Booking     Student Booking completely cancel       Details     X       Image: Staff Member:     STAFF, DEMO       CLASSES - COMPLETELY CANCELLED     Student Booking in Completely cancel       Student Booking in Completely cancelled     O       Classid 39     Reason Moving.       Class Details LTS Friday 09:30:00 Starfish     Reason :Student booking completely cancelled       On Host machine::L-LAPTOP     OK | ed<br>et        |
|  | Export Print  | Close           |



# Admin Changes

### Staff ID areas now allow entry of Special Characters

Sites using NT Authorisation and some usernames have hyphens & underscores, Links now has the ability to allow for these within the staff ID and can be used in any area within Links where Staff Code is required.

| Authorisation required × |             |  |  |  |  |  |
|--------------------------|-------------|--|--|--|--|--|
| Staff Code:              | LISAJ       |  |  |  |  |  |
| Password:                |             |  |  |  |  |  |
|                          | ✓ OK Cancel |  |  |  |  |  |

### LMS\_DDOverides Export now includes Class Type Description

When you run the LMS\_DD Overrides export, there is not the option to include the Class Type Description which will assist with multi location sites. This is run in Admin> File> Export to Excel utility.

| Export details from database  | _ [             | X                |                     |            |
|---|-----------------|------------------|---------------------|------------|
| Table Name:       LMS_DD0verrides         Columns to export       Columns         CLASSTYPEDESCRIPTION       Add >>         EXSONDAY       Add >>         LESSONTIME       Add >>         OVERRIDEAMOUNT       Add All >>         REASON       STARTDATE         STUDENTID       <<   |                 |                  |                     |            |
|   |                 |                  |                     |            |
| III E S- c <sup>3</sup> - = Book1 - Excel<br>RLE HOME INSERT PAGELAYOUT FORMULAS DATA REVIEW VIEW   |                 |                  |                     |            |
| Scut     Calibri     11     A* A*     =     >>     >>     Wrap Text     General     Image: Constant of the second | Bad             | Good             | Neutral             | alculation |
| Paste<br>✓ Format Painter B I U   | Explanatory     | / Input          | Linked Cell         | lote       |
| Clipboard ra Font ra Alignment ra Number ra   |                 | Styles           |                     |            |
|   |                 |                  |                     |            |
| A         B         C         D         E         F         G         H         I         J           1         CEASEDATE         CLASSTYPEDESCRIPTION         EXPIRYDATE         LESSONLEVEL         LESSONTIME         OVERRIDEAMOUNT         REASON         STARTDATE         STUDENTID  | K<br>STUDFIRSTN | AME STUDLASTNAME | M<br>TEACHFIRSTNAME | TEACHLASTN |
| 2 LTS 24/12/2015 Tuesday Tadpole 2/01/1900 9:30 \$15.00 TEST DD OVERRIDE 3/02/2015 34   | LILLY           | JONES            | TODD                | BROWN      |
| 4   |                 |                  |                     |            |

• ==



# Additions to the Audit Log

Ability to view the Aurthorised Staff Member and the Logged in user for some POS action in the Audit Log.

These include

- Voids and
- No Sale transactions

By double clicking on the line in the results box, you are able to View the Staff Member who Authorised the POS action and who the Logged in user was.

| 5  |   | Audit Log  |           |           |         |       | ×     |
|--|---|--|-----------|-----------|---------|-------|-------|
| Filter options         D           From:         15 JAN 2016         D           To:         15 JAN 2016         D | Display Only:<br>AUDIT LOG<br>LOGIN<br>Vo sale<br>Transaction<br>Select All                                 | 3 ACCESS   |           |           |         |       | Apply |
| Date Time Description  |   | Staff Member                                       | Old Value | New Value | Beason  |       |       |
| 15 JAN 20 10:25 AM No sale: Logged in user: SWIM ,   | , TEACHER   | TRAINER, TRAINER                                   |           |           | No Sale |       |       |
| 15 JAN 20 10:25 AM Transaction voided: Logged in u   | iser: SWIM , TEACHER  | TRAINER, TRAINER                                   |           |           | QQWWW   |       |       |
|  | Detai<br>Staff Member: TI<br>No sale<br>Logged in user<br>SWIM, TEACHE<br>Reason: No Sale<br>On Host machin | ils ×<br>RAINER, TRAINER<br>R<br>e: ELISE-PC<br>OK |           |           |         |       |       |
| <  |   |  |           |           |         |       | >     |
|  |   |  |           |           | Export  | Print | Close |



# Preferred Supplier added to LMS\_ProductsAndBarcodes View

When you run the LMS\_ProductsAndBarcodes export, there is now the option to include the Preferred Supplier.

| 8   | Export details from database        | _ |  | x |  |  |  |  |  |
|---|-------------------------------------|---|--|---|--|--|--|--|--|
| Table Name: LMS_F<br>Columns to export<br>DESCRIPTION<br>ID<br>LOCATIONID<br>OTHERBARCODE<br>PREFERREDSUPPLIER<br>PRODUCTCUDE<br>TYPE | Add >>         Add All >>         < |   |  |   |  |  |  |  |  |
| Next Export   |                                     |   |  |   |  |  |  |  |  |

|     | A                                | В  | С          | D            | E                 | F           | G    | Н |
|-----|----------------------------------|----|------------|--------------|-------------------|-------------|------|---|
| 1 0 | DESCRIPTION                      | ID | LOCATIONID | OTHERBARCODE | PREFERREDSUPPLIEF | PRODUCTCODE | TYPE |   |
| 2 F | Pump Water                       | 20 | 1          | 123456789    | COCA-COLA         | P1000       | Ρ    |   |
| 3 0 | Goggles- Speedo Mirror Lenses    | 21 | 1          | 987654321    | SPEEDO            | P1001       | Ρ    |   |
| 4 S | Speedo Vortex Retro Trunk Blk 12 | 22 | 1          | 12345678     | SPEEDO            | P1002       | Ρ    |   |
| 5 S | Speedo Vortex Retro Trunk Blk 14 | 23 | 1          | 1.23457E+11  | SPEEDO            | P1003       | Ρ    |   |
| 6 S | Speedo Vortex Retro Trunk Blk 16 | 24 | 1          | 1.23457E+11  | SPEEDO            | P1004       | Ρ    |   |
| 7 S | Speedo Vortex Retro Trunk Blk 18 | 25 | 1          | 1.23457E+11  | SPEEDO            | P1005       | Ρ    |   |



# Facility settings now setup under the Location

The Facility settings have been moved to Admin> Site> Other Site Parameters (Or Set Up Locations for multi-location sites)> Facility Tab.

| C Other Site Paramete   | ers ×   |
|---|---|
| Details         Stock Stores         Tills         Templates         Appoint's / Cards           Access Points         ClassWeb         Active Carrot         Security         SMS  | Memberships Visit Passes Class Types Sessions<br>Facility Visits Dashboard        |
| Image: Show Socking if client owes money on issued invoices         Image: Show Socking To Pax on Attend         Image: Show Socking Duration in Hours (instead of Minutes)         Image: Show Socking Duration in Hours (instead of Minutes)         Image: Show Copy prime usage message         BCC Email for Booking Confirmations:         Image: Default Client Bookings         Image: Only the period One         Image: Set Time Period One         From:       to:         Time Period Two         From:       to: | Use Time Dropdowns on Vacancy Search screen Time Dropdown Format  AM/PM O 24-Hour |
|   | Save Delete Clear Clone Close   |



# Ability to Select the Default Client Search Option

Under the Facility settings tab you can select the default search option when searching for a client. You can select the search default to be either the Clients Name or the Company Group depending on your requirements.

| 8   |  | 0                     | ther Site Paramet        | ers  |                                  |             | ×        |
|---|--|-----------------------|--------------------------|--|----------------------------------|-------------|----------|
| Details Stock Stores<br>Access Points ClassWeb  | Tills<br>Active Carrot                                       | Templates<br>Security | Appoint's / Cards<br>SMS | Memberships<br>Facility                          | Visit Passes<br>Visits Dashboard | Class Types | Sessions |
| <ul> <li>☑ Display warning on booking if clien</li> <li>☑ Default to 7 day view in Facility Bo</li> <li>□ Validate Product/Service(s) for Fa</li> <li>☑ Prompt For Pax on Attend</li> <li>☑ Show Booking Duration in Hours  </li> </ul> | nt owes money on<br>pokings<br>icility<br>instead of Minutes | issued invoices       | Use Time<br>Time Di      | Dropdowns on Vacan<br>opdown Format<br>AM/PM O 2 | cy Search screen<br>4-Hour       |             |          |
| BCC Email for Booking Confirmations Default Client Bookings O Invoice Default Client Search Option  | Cash or  | n Arrival             |                          |  |                                  |             |          |
| Set Time Periods on Visual Facility   Time Period One From: Time Period Two From: From:   | Bookings to:   |                       |                          |  |                                  |             |          |
|   |  |                       |                          |  | Save Delete                      | Clear       | Close    |



# Ability to Choose to Show the Copy Prime Usage Message

From the Facility settings tab you can choose if want the 'Copy Prime Usage Message to appear when making/updating bookings.

| Characteris         X   |   |  |
|---|---|--|
| Details         Stock Stores         Tills         Templates         Appoint's / Cards           Access Points         ClassWeb         Active Carrot         Security         SMS  | Memberships Visit Passes Class Types Sessions Facility Visits Dashboard |  |
| Image: Series of the series | Use Time Dropdowns on Vacancy Search screen Time Dropdown Format        |  |
|   | Save Delete Clear   |  |



# Changes to Security Groups and Menu Security

There has been a large number of changes with the Security Groups and Menu Security. We would advise that once you have upgraded, you work through all security groups to complete an audit of what is selected.

# 'Open' function for producing Confirmation Letter by Security Group

You have the ability to restrict which security groups can open a Facility Booking Confirmation letter in Microsoft Word. This will prevent staff from making unauthorised changes. If you don't want staff to have access to the OPEN Function leave this field un-ticked.

| 0   | Security Group Setup   | x   |
|---|--|---|
| Group Code: RECEPTION<br>Description: RECEPTION<br>Administrator Group<br>Modules POS<br>VP Facility<br>Can modify facility bookings.<br>Can create casual bookings - cash only.<br>Can assign staff/assets.<br>Only book days in advance.<br>Can only book PAY NOW<br>Only book lowest level facilities.<br>Only attend casual bookings.<br>Can view book location's facilities.<br>Can modify Booking Charge after Payment made | Classes Members<br>consult.link<br>Can override external documents path<br>Can book in unavailable times<br>Can unlock open bookings<br>Can limit booking screen access<br>Can access enquity screen<br>Can access enquity screen<br>Can telete booking documents and files<br>Can teverse Invoice Sent Flag<br>Can use Booking Letter OPEN function<br>Can book over existing enquity<br>Can enquite over existing enquity<br>Can enquite over existing booking | Group Members         Staff Code         10       JOHNSON LISA         10       JOHNSON LISA         Value       JOHNSON LISA |
| 🛱 Facility Booking Documents - 82   |  |   |
| Create Booking Confirmation Letter  |  |   |
| Template: File Name: C:\Links Modular Solutions'<br>Description: Booking Confirmation   | Links Templates\Facility Booking Confirmation.dot  | Use Default Set As Default Default Template   |
| Save As: File Path: C:\Links Modular Solutions<br>File Name: [82_1_Letter.pdf<br>Description: [82_1_Letter<br>Invoice No: 82_1<br>After Create: © Save © Open C<br>Create © C   | \Bookings 82\<br>Email   |   |
|   |  | Close   |

The letter can then only be saved as a PDF to which can be re-opened later from the documents section.


# Ability to Unissue Invoices by Security Group

You now have the ability to restrict which staff are able to unissued invoices that have already been issued. If this is selected then those staff will be able to unissue issued invoices.



# **Security for Print Cards**

You have the ability to restrict which staff can Print Cards by Security Group.

| 8  | Security Group Setup                                 | x |
|--|--|---|
| Group Code: RECEPTIO<br>Description: RECEPTIO  | N Group Members Staff Code Last Name 10 JOHNSON LISA |   |
| VP<br>Modules  | Facility consult.link POS Classes Members            |   |
| Image: Teaching       Imag | Maintain Tables Authorised to Print Cards            |   |

#### Ability to Lock Visit Pass Maintenance Screen to Read Only

You now have the ability to restrict which staff are able to make any changes in the Visit Pass Maintenance Screen. This is done in Security Groups. Admin> Security> Security Groups> VP tab. It this is Selected then those staff will be able to Make Changes to Visit Passes.

| Modules              | POS                       |
|----------------------|---------------------------|
| VP L                 | Facility                  |
|                      |                           |
| Create new contract  | from the Setup VP screen. |
| 🔲 Read-Only Maintain | VP Screen                 |
|                      |                           |



Once Ticked and staff with read only go to Maintain Visit Passes they cannot change anything.

| CustomerID:       39        + New       Full Name:       JONES       INDIANA         VisitPass ID       Code       DateStarted       Expiry Date       Status         19       Pool 20 Visit - Adult       21/10/2015       27/10/2015       Active         7       Personal Training 10 3.       3/02/2015       2/02/2017       Active         ©       Current Only       C       Include History         Visit Pass ID=7       Active       Limit at Sale:       10         Type Code:       VP1003       Limit at Sale:       10       Visits         Activities:       >>       Total Extra Added:       0       Visits   | Visit Passes\\Customer Number - 39                                       |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
| VisitPass ID       Code       DateStarted       Expiry Date       Status         19       Pool 20 Visit - Adult       21/10/2015       27/10/2015       Active         IP       Personal Training 10 3       3/02/2015       2/02/2017       Active         Image: Current Only       Image: Current Only       Image: Current Only       Image: Current Only       Visit Pass ID=7         Visit Pass ID=7       Active       Image: Current only       Image: Current only       Visits         Type Code:       VP1003       Image: Current only       Visits       Image: Current only       Visits         Activities:       >>       Image: Current only       Visits       Image: Current only       Visits | Gender: M  |  |  |  |  |  |  |
| Visit Pass ID=7  Visit Pass ID=7  Type Code: VP1003  Active  Total Extra Added: 0  Visits  Total Extra Added: 10  Visits   | View Details<br>Create New<br>Personal Details<br>Marketing Info         |  |  |  |  |  |  |
| Date Started:     3 FEB 2015     D     Add Extra Visit:     Show       Expiry Date:     2 FEB 2017     D     Converted     Show  | Visits Used: 0<br>Remaining: 10<br>s Allocated: 1<br>v Visits History >> |  |  |  |  |  |  |
| Comment:       Pricing         Sales Person:       Price at Sale: \$ 400.00         Location:       Loc1         Contract updates:       >>         Date Issued: 03 Feb 2015 13:22       Last Updated: 03 Feb 2015 13:22   | ount Paid : \$ 400.00<br>unt Owed: \$ 0.00                               |  |  |  |  |  |  |



# Location Access now configurable by Staff Member (Multi Location Database only)

In staff setup, the locations that each staff member can access is now configurable. This is only available if the user has permission to change the location as defined in the Security Group Menu.

By default, all Staff Members will have access to all locations. An admin user can then restrict a staff members available locations from the Staff Setup screen. There is no bulk update screen.

| ts St   | taff Setup   |
|---|--|
| Staff Code:     5      Next No.     I       Person:     5       Personal     Contact     Security     Roles     Skills & Training | Availability   Functions & Classifications         |
| Security Group Membership<br>Group Code: OFFICE ADMIN<br>Description: OFFICE ADMIN  | Password Change Password Change >>                 |
| Available Locations         Home Location:       Loc1         This user has permission to change location                         | Available Locations: All None Location C Loc1 LOC2 |
| Personal Print card   | Save Delete Clear Clone Close                      |



If the Staff Member does not have permission to change the location, the screen will look like this.

| Staff Setup   | ×        |
|---|----------|
| Staff Code: 3 Next No. Inactive Person: 3   |          |
| Personal Contact Security Roles Skills & Training Availability Functions & Classifications                            | - 1      |
| Security Group Membership       Password Change         Group Code:       TEACHER         Description:       TEACHER  |          |
| Available Locations         Home Location:         Loc1         This user does not have permission to change location |          |
| Personal Print card   | ]<br>ose |

The User will only be able to view their Home Location and cannot change or view other locations.

Upon start up, if Links has no Home Location, the user is prompted for a location. At this point, ALL locations are listed as there is no User logged in at this point.

| 5    | Choose L                     | ocation        | - |       | ×   |
|------|------------------------------|----------------|---|-------|-----|
| Sele | ct a Home Locatio            | on for this PC |   |       |     |
|      | Loc1<br>Loc1<br>LOC2<br>LOC3 |                |   | •     |     |
|      |                              | ✓ ОК           | ) | < Can | cel |



The staff member will be required to select a home location.

| 5    | Choose Location                | - |       | × |
|------|--------------------------------|---|-------|---|
| Sele | ct a Home Location for this PC |   |       |   |
| ļ    | LOC2                           |   | •     |   |
|      |                                |   |       |   |
|      | ✓ ОК                           | × | Cance |   |

Upon login, a check is made to see if the staff member can access the Home Location. If not, the user is presented with a list of available locations.

| 5     | Choose I           | Location        | - |      | x   |
|-------|--------------------|-----------------|---|------|-----|
| Selec | et a Home Locati   | ion for this PC |   |      |     |
|       | .oc1<br>oc1<br>0C2 |                 |   | -    |     |
|       |                    | <b>√</b> 0K     | × | Cano | cel |

Once logged in, the staff member may change location using the change location button as normal, however they will only be able to select from their list of locations.



In other screens of Links, the staff member will only be able to view their locations that they have access to, including:

POS

- Manage Facility Favourites
- Find Products
- Facility Booking Payment
- Setup Customer
- Till Off Secure

#### Admin

- Bulk Bonus Days
- Bulk Facility Price Updates
- Bulk Sessions Access
- Bulk Web Registration
- Suspension Fee Update
- Inactive Products
- Mandatory Fields
- System Security
- Retention Program Setup
- Appointment Types
- Setup Customer Accounts
- Setup Direct Debit Details
- Facility Setup
- Setup Locations
- Setup Receipts
- Product Master Setup
- Setup Product Units
- Product Grouping Setup
- Sessions

# • Vacancies

- Access Points
- Facility Booking Search
- Visual Scheduler
- Bulk Facility Override Price
- Bulk Price Change
- Bulk Sessions Update
- Bulk Suspension
- Direct debit
- Kiosk Settings and Registration
- Online Product Sales
- Sales Settings
- Alternate Price Mode
- Class Type Setup
- Setup LinksPay Direct Debit
- Setup Email Settings
- Setup Kits
- Setup New Access
- Copy Product Location Details
- Setup a Product
- Setup Product Location
- Setup Public Holidays
- Site Setup

#### Members

• Bulk Price Update



# Reporting Changes

# **Enquiry Conversions to Facility Bookings**

There is a new report to show the conversion of Facility Enquiries to Facility bookings called Enquiry Conversions.

To display a list of enquiries that have been converted to a booking during a date/facility range use the below example.

| ₿ E                       | nquiry Conversions to Facility Bookings  | _ <b>D</b> X |
|---------------------------|--|--------------|
| Selection Criteria        |  |              |
| Report Type               |  | Print        |
| Converted To Bookings     |  | Export       |
| Not Converted to Bookings |  |              |
| F. D                      |  | Graph        |
| To Date: 1 OCT 2015       | D  | Preview      |
| - Facilities              |  | Close        |
| €- ✓ Centre Facilities    | Facility           AC TRIAL/50m boom/           AC TRIAL/50m boom/25m north/           AC TRIAL/50m boom/25m north/Lane 1 25m North/           AC TRIAL/50m boom/25m north/Lane 1 25m North/           AC TRIAL/50m boom/25m north/Lane 2 25m North/           AC TRIAL/50m boom/25m north/Lane 3 25m North/           AC TRIAL/50m boom/25m north/Lane 4 25m North/           AC TRIAL/50m boom/25m north/Lane 5 25m North/           AC TRIAL/50m boom/25m north/Lane 5 25m North/           AC TRIAL/50m boom/25m north/Lane 8 25m North/           AC TRIAL/50m boom/25m north/Lane 8 25m North/           AC TRIAL/50m boom/25m north/Lane 8 25m North/           AC TRIAL/50m boom/25m south/Lane 1 25m South/           AC TRIAL/50m boom/25m south/Lane 2 25m South/           AC TRIAL/50m boom/25m south/Lane 2 25m South/           AC TRIAL/50m boom/25m south/Lane 2 25m South/           AC TRIAL/50m boom/25m south/Lane 3 25m South/           AC TRIAL/50m boom/25m south/Lane 5 25m South/           AC TRIAL/50m boom/25m south/Lane 6 25m South/           AC TRIAL/50m boom/25m south/Lane 8 25m South/           AC TRIAL/50m boom/25m south/Lane 8 25m South/           AC TRIAL/50m boom/25m south/Lane 8 25m South/ |              |

#### Demo Site

Enquiries Converted to Facility Bookings From : 1/10/2015 To : 31/10/2015

| Facility Name | Date       | From Time | To Time  | Staff Name  | Comments |
|---------------|------------|-----------|----------|-------------|----------|
|               |            |           |          |             |          |
| Enquiry ID 69 |            |           |          |             |          |
| 50M Pool      | 19/10/2015 | 09:00 AM  | 11:00 AM | STAFF, DEMO |          |

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

To view a list of enquiries that haven't been converted during a date/facility range use the below example.



| 8  | Enquiry Conversions to Facility Bookings  | _ 🗆 X     |
|--|---|-----------|
| Selection Criteria     Report Type     O Converted To Bookings |   | Print     |
| Not Converted to Bookings                                      |   | Export    |
| From Date: 1 OCT 2015  | D   | Graph     |
| To Date: 31 OCT 201  | 5 D   | Preview   |
| Facilities   |   | <br>Close |
| Centre Facilities  | Facility           AC TRIAL/           AC TRIAL/50m boom/           AC TRIAL/50m boom/25m north/           AC TRIAL/50m boom/25m north/Lane 1 25m North/           AC TRIAL/50m boom/25m north/Lane 2 25m North/           AC TRIAL/50m boom/25m north/Lane 4 25m North/           AC TRIAL/50m boom/25m north/Lane 6 25m North/           AC TRIAL/50m boom/25m north/Lane 8 25m North/           AC TRIAL/50m boom/25m north/Lane 8 25m North/           AC TRIAL/50m boom/25m south/Lane 2 25m South/           AC TRIAL/50m boom/25m south/Lane 2 25m South/           AC TRIAL/50m boom/25m south/Lane 3 25m South/           AC TRIAL/50m boom/25m south/Lane 3 25m South/           AC TRIAL/50m boom/25m south/Lane 3 25m South/           AC TRIAL/50m boom/25m south/Lane 4 25m South/           AC TRIAL/50m boom/25m south/Lane 4 25m South/           AC TRIAL/50m boom/25m south/Lane 4 25m South/           AC TRIAL/50m boom/25m south/Lane 3 25m South/           AC TRIAL/50m boom/25m south/Lane 4 25m South/           AC TRIAL/50m boom/25m south/Lane 7 25m South/           AC TRIAL/50m boom/25m south/Lane 8 25m South/           AC TRIAL/50m boom/25m south/Lane 8 25m South/           AC TRIAL |           |

Demo Site

#### Enquiries Not Converted to Facility Bookings From : 1/10/2015 To : 31/10/2015

| Facility Name | Date       | From Time | To Time  | Staff Name  | Comments |
|---------------|------------|-----------|----------|-------------|----------|
|               |            |           |          |             |          |
| Enquiry ID 68 |            |           |          |             |          |
| 50m           | 9/10/2015  | 07:15 AM  | 08:15 AM | STAFF, DEMO |          |
|               |            |           |          |             |          |
| Enquiry ID 73 |            |           |          |             |          |
| 50M Pool      | 20/10/2015 | 10:00 AM  | 12:30 PM | STAFF, DEMO |          |
|               |            |           |          |             |          |
| Enquiry ID 74 |            |           |          |             |          |
| 50M Pool      | 21/10/2015 | 10:00 AM  | 02:00 PM | STAFF, DEMO |          |

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



# Reports for Bookings with Charges yet to be Invoiced

A new report is available to view bookings that have yet to have their charges sent to account to Invoiced. This can be viewed by going to Reporting> Facility> Bookings with Outstanding Invoice.

| 8                                      | Bookings With Outstanding Invoice  | _ 🗆 X                    |
|--|--|--------------------------|
| Selection Criteria From Date: To Date: | D       Image: Constraint of the second | Print<br>Export<br>Graph |
| Customers ar                           | nd Clients   | Preview<br>Close         |

Enter the date range, select the Report Mode you wish to view and then select the Booked By option as required.

Report Mode: Show Bookings with invoice charges not paid

#### Demo Site

#### Facility Bookings with Outstanding Invoices From : 21 Sep 2015 To : 19 Jan 2016

| Client / Customer | Clientld /<br>Customerld | Debtorld | BookingId | Booking Name             | Charges | InvoiceId | Invoice<br>Total | Paid<br>Amount | Amount<br>Not<br>Invoiced |
|-------------------|--------------------------|----------|-----------|--------------------------|---------|-----------|------------------|----------------|---------------------------|
| TEST SCHOOL       | 1                        | 123456   | 69        | School Swimming          | 2000    | 6.00      | 2,000.00         | 0.00           | 2000                      |
| TEST SCHOOL       | 1                        | 123456   | 76        | School Sport Volley Ball | 2880    | 4.00      | 175.00           | 55.00          | 120                       |
| TEST SPORTS CLUB  | 2                        | 987654   | 75        | Basketball Training      | 4130    | 3.00      | 1,185.00         | 0.00           | 1185                      |

End of report

Report Mode: Show bookings with charges not sent to an invoice

Demo Site

#### Facility Bookings with Outstanding Invoices From : 21 Sep 2015 To : 19 Jan 2016

| Client / Customer | Clientld /<br>Customerld | Debtorld | Bookingld | Booking Name        | Charges | InvoiceId | Invoice<br>Total | Paid<br>Amount | Amount<br>Not<br>Invoiced |
|-------------------|--------------------------|----------|-----------|---------------------|---------|-----------|------------------|----------------|---------------------------|
| TEST SCHOOL       | 1                        | 123456   | 78        | Fitness Test        | 55      | 0.00      | 0.00             | 0.00           |                           |
| TEST SPORTS CLUB  | 2                        | 987654   | 77        | Basketball Training | 3360    | 0.00      | 0.00             | 0.00           |                           |
|                   |                          |          |           |                     |         |           |                  |                |                           |

End of report



#### Ability to report for Un-issued Invoices

You now have the ability to run the Invoice Reconciliation Summary to show those Accounts that have Unissued Invoices. This can be run by going to Reporting> POS> Reports> Invoices> Reconciliation Summary.

Select the Run date, tick 'Unissued Invoices Only' and select the 'Show Account' options as required.

| Payables Reconciliation [Summary]   | x  |
|---|--|
| Selection Criteria  Run Date: 21 OCT 2015  Include Accounts with a Credit. Include unvissued invoices Include not yet due invoices Include Credit Notes Credit Notes Only Show Accounts: IC Lients Customers IC Detail by Invoice | Print<br>Export<br>Graph<br>?review<br>Close |

#### Payables Reconciliation [Summary] for Clients and Customers 23 SEP 2015

| Account | Account Name     | Contact      | Total Due, \$ | 0.30,\$ | 31-60,\$ | 61 - 90,\$ | 90 +,\$ |
|---------|------------------|--------------|---------------|---------|----------|------------|---------|
| 2047    |                  |              | 25.65         | 0.00    | 0.00     | 0.00       | 0.00    |
| 844     | . MONGO          |              | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 2053    | ACCOUNT TEST22   |              | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 2039    | CUPONG OMAX      |              | 50.00         | 0.00    | 0.00     | 0.00       | 0.00    |
| 2043    | CUMWOPOT TASVOCA |              | 5,009.45      | 0.00    | 0.00     | 0.00       | 0.00    |
| 1       | DEMO CLIENT      | DEMO CONTACT | 43.90         | 0.00    | 0.00     | 0.00       | 0.00    |
| 1343    | DEMO CLIENT      | DEMO CONTACT | 16.95         | 0.00    | 0.00     | 0.00       | 0.00    |
| 1547    | DEMO CLIENT      | DEMO CONTACT | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 1741    | DEMO CLIENT      | DEMO CONTACT | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 318     | GOTO CESOT       |              | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 2044    | MCKELLAR ANDREW  |              | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 2055    | NEGATIVE ONE     | NEGGY NANCY  | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 2040    | PONOO OMAX       |              | 0.00          | 0.00    | 0.00     | 0.00       | 0.00    |
| 2041    | SMITH BOBBY      |              | 22.20         | 0.00    | 0.00     | 0.00       | 0.00    |
| 2042    | SMITH SALLY-ANNE |              | 35.60         | 0.00    | 0.00     | 0.00       | 0.00    |
| 1608    | TOVOWW YORD      |              | 5.10          | 0.00    | 0.00     | 0.00       | 0.00    |
| 1666    | WOOFOY APMYN     |              | 6.10          | 0.00    | 0.00     | 0.00       | 0.00    |
|         |                  |              |               |         |          |            |         |
|         | TOTAL (17):      |              | 5,214.95      | 0.00    | 0.00     | 0.00       | 0.00    |

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

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



# Ability to Include Credit Notes in the Invoice Reconciliation Summary Report

You now have the ability to run the Invoice Reconciliation Summary to Include Credit Notes that have been issued. This can be run by going to Reporting> POS> Reports> Invoices> Reconciliation Summary.

| Payables Reconciliation [Summary] | x       |
|-----------------------------------|---------|
| - Selection Criteria              |         |
| Run Date: 11 NOV 2015 D           | Print   |
| Include Accounts with a Credit.   | Export  |
| Include un-issued invoices        | 1       |
| Include not yet due invoices      | Graph   |
| Unissued Invoices Only            | Preview |
| 🔽 Include Credit Notes            |         |
| 🔲 Credit Notes Only               | Close   |
| Show Accounts:                    |         |
| Clients 🔽 Customers               |         |
| Summary by Account                |         |
| O Detail by Invoice               |         |

# Ability to report for Credit Notes Only

You now have the ability to run the Invoice Reconciliation Summary to show 'Credit Notes Only'. This can be run by going to Reporting> POS> Reports> Invoices> Reconciliation Summary.

Select the Run date, tick 'Credit Notes Only' and select the 'Show Account' options as required.

| Payables Reconciliation [Summary]        | X       |
|--|---------|
| Selection Criteria                       |         |
| Run Date: 11 NOV 2015 D                  | Print   |
| ☐ Include Accounts with a Credit.        | Export  |
| Include un-issued invoices               | Graph   |
| Include not yet due invoices             |         |
| Unissued Invoices Only                   | Preview |
| Include Credit Notes  Credit Notes Only  | Close   |
| Show Accounts:                           |         |
| Clients 🔽 Customers                      |         |
| Summary by Account     Detail by Invoice |         |

#### Payables Reconciliation [Summary] for Clients and Customers 11 N OV 2015

| Account | Account Name | Contact | Total Due, \$ | 0 - 30, <b>\$</b> | 31 - 60,\$ | 61 - 90 <b>,\$</b> | 90 +,\$ |
|---------|--------------|---------|---------------|-------------------|------------|--------------------|---------|
| 1       | TEST SCHOOL  | JON     | -2,100.00     | -2,100.00         | 0.00       | 0.00               | 0.00    |
|         |              |         |               |                   |            |                    |         |
|         | TOTAL (1):   |         | -2,100.00     | -2,100.00         | 0.00       | 0.00               | 0.00    |

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

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



# Extra columns for Booking Charge Breakdown Export

Extra fields have been added to the Booking Charge Breakdown Report as below. This report is found via Report> Facility> Booking Charge Breakdown.

| 8  | Booking Charge Breakdown  | _ 🗆 X                               |
|--|---|-------------------------------------|
| Selection Criteria         From Date:       21 0CT 2015       D         Booked By           C Asual           C Lossonal           C Customer           C Client           Name:           Include Adjustments | To Date: 19 JAN 2016 D  | Print<br>Export<br>Preview<br>Close |
| E-V Centra Facilities  | Facility       ∧         AC TRIAL/S0m boom/       ≣         AC TRIAL/S0m boom/25m north/are 125m North/       ≣         AC TRIAL/S0m boom/25m north/are 125m North/       ≣         AC TRIAL/S0m boom/25m north/are 125m North/       ≦         AC TRIAL/S0m boom/25m north/are 225m North/       ≦         AC TRIAL/S0m boom/25m north/Lane 325m North/       AC TRIAL/S0m boom/25m north/Lane 425m North/         AC TRIAL/S0m boom/25m north/Lane 425m North/       AC TRIAL/S0m boom/25m north/Lane 625m North/         AC TRIAL/S0m boom/25m north/Lane 825m North/       AC TRIAL/S0m boom/25m north/Lane 825m North/         AC TRIAL/S0m boom/25m north/Lane 825m North/       AC TRIAL/S0m boom/25m north/Lane 825m North/         AC TRIAL/S0m boom/25m north/Lane 825m North/       AC TRIAL/S0m boom/25m south/         AC TRIAL/S0m boom/25m south/Lane 125m South/       AC TRIAL/S0m boom/25m south/Lane 125m South/         AC TRIAL/S0m boom/25m south/Lane 425m South/       AC TRIAL/S0m boom/25m south/Lane 425m South/         AC TRIAL/S0m boom/25m south/Lane 425m South/       AC TRIAL/S0m boom/25m south/Lane 425m South/ |                                     |

Standard Unit Price and Standard Charge columns have been added to reflect where a booking or other charge has been billed at a non-standard rate.

| 6 | test.csv - Microsoft Excel |          |                  |         |                   |                       |           |                   |                  |           |                 |                 |                                       |                  |           |
|---|----------------------------|----------|------------------|---------|-------------------|-----------------------|-----------|-------------------|------------------|-----------|-----------------|-----------------|---------------------------------------|------------------|-----------|
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|   |                            | А        | В                | С       | D                 | E                     | F         | G                 | Н                |           |                 |                 |                                       |                  | _         |
| 1 | . Fac                      | ility Bo | From Date        | To Date | Product C         | Product D             | Quantity  | Actual Unit Price | Actual Charge    | \$ Inc. T | Standard Unit P | rice \$ 9       | Standard Charg                        | e \$ Inc. T      | Tax (     |
| 2 | 2 CO                       | URT 1    |                  | *****   | S10351            | Basketbal             | 2         | 15                |                  | 30        |                 | 15              |                                       |                  | 30 6      |
| 3 | 3 CO                       | URT 1    | *****            | ****    | S10351            | Basketbal             | 2         | 15                |                  | 30        |                 | 15              |                                       |                  | 30 6      |
| 2 | 4 CO                       | URT 1    | *****            | *****   | S10351            | Basketbal             | 2         | 15                |                  | 30        |                 | 15              |                                       |                  | 30 6      |

Tax % column added.

| 6 | <b>. . . . . .</b>                    | ÷                      |                        |                             | test.csv -           | Microsoft Excel |                    |                             |                       |          |            |        |                                | -                          |
|---|---------------------------------------|------------------------|------------------------|-----------------------------|----------------------|-----------------|--------------------|-----------------------------|-----------------------|----------|------------|--------|--------------------------------|----------------------------|
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|   | G                                     | Н                      | ·····                  | J                           | K                    | L               | M                  | N                           | 0                     | Р        | Q          | К      | S                              | Т                          |
| 1 | Actual Unit Price Ac                  | tual Charge \$ Inc. T  | Standard Unit Price \$ | Standard Charge \$ Inc. Tax | Catego               | ory [ Category] | ChargeT            | yr Booking N                | BookingI              | EX GST   | GST        | TAX %  | Booked B                       | Debtor Id                  |
| 2 | 15                                    | 30                     | 15                     | 3                           | 0 6666-1             | 250 LOC 1 GEN   | Facility C         | Ch julian test              | 9160                  | 27.27    | 2.73       | 1      | a OMAX CU                      | PONG                       |
|   |                                       |                        |                        |                             | 0 0000 0             | 350 LOC 1 CEN   | Encility (         | Chiulian test               | 9160                  | 27.27    | 2 73       | 1      |                                | PONG                       |
| 3 | 15                                    | 30                     | 15                     | 3                           | 0 6666-1             | 250 LOC I GEN   | cracincy c         | ci junan ces                | 5100                  |          |            |        | and the second                 | 0.40                       |
| 3 | 15                                    | 30                     | 15                     | i 31                        | D 6666-1<br>D 6666-1 | 250 LOC 1 GEN   | Facility C         | Chjulian test               | 9160                  | 27.27    | 2.73       | 1      | ) OMAX CU                      | PONG                       |



# Booked by & Debtor ID added.

|    |                             |              |             |              |             |           | te          | st.csv - Micro | soft Excel |                    |   |                  |        |     |
|----|-----------------------------|--------------|-------------|--------------|-------------|-----------|-------------|----------------|------------|--------------------|---|------------------|--------|-----|
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|    | J                           | К            | L           | M            | N           | 0         | Р           | Q              | R          |                    | S   | Т                |        | U   |
| 1  | Standard Charge \$ Inc. Tax | Category     | (CategoryT  | ChargeTyp    | BookingN    | BookingI  | EX GST      | GST            | TAX %      | Booke              | d By  | Debtor           | Id     |     |
| 2  | 30                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | julian test | 9160      | 27.27       | 2.73           | 10         | ОМАХ               | CUPONG  |                  |        |     |
| 3  | 30                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | julian test | 9160      | 27.27       | 2.73           | 10         | OMAX               | CUPONG  |                  |        |     |
| 4  | 30                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | julian test | 9160      | 27.27       | 2.73           | 10         | ОМАХ               | CUPONG  |                  |        |     |
| 5  | 30                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | julian test | 9160      | 27.27       | 2.73           | 10         | ОМАХ               | CUPONG  |                  |        |     |
| 6  | 0                           | 6666-1368    | LOC 1 GEN   | Facility Ch  | narge       | 9447      | 0           | 0              | 10         | TASVO              | CA CUWWOPOT                                     |                  |        |     |
| 7  | 15                          | 6666-1276    | LOC 1 GEN   | Facility Ch  | narge       | 9448      | 13.64       | 1.36           | 10         | SUWF               | COCKOTWON                                       |                  |        |     |
| 8  | 50                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | narge       | 9449      | 45.45       | 4.55           | 10         | TASVO              | CA CUWWOPOT                                     |                  |        |     |
| 9  | 50                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | narge       | 9450      | 45.45       | 4.55           | 10         | DEMO               | CLIENT  | 32423            | 14     |     |
| 10 | 50                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | narge       | 9450      | 45.45       | 4.55           | 10         | DEMO               | CLIENT  | 32423            | 14     |     |
| 11 | 50                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | narge       | 9450      | 45.45       | 4.55           | 10         | DEMO               | CLIENT  | 32423            | 14     |     |
| 12 | 50                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | narge       | 9450      | 45.45       | 4.55           | 10         | DEMO               | CLIENT  | 32423            | 14     |     |
| 13 | 50                          | 6666-1250    | LOC 1 GEN   | Facility Ch  | narge       | 9450      | 45.45       | 4.55           | 10         | DEMO               | CLIENT  | 32423            | 14     |     |
|    | -                           |              |             |              |             |           | -           | -              |            |                    |   |                  |        |     |

# Additional Columns/Filter for Booking Charges vs Paid Report

Report> Facility> Booking Charges vs Paid Report.

Total Booking Charges column added (reflects all charges for the booking ID regardless of date filter)

Difference column added (illustrates the difference between charges for this date period and Total Charges)

#### Test 3 Location 1

| Client         | Booking Id | Booking Name | Prime Usage                    | Charges | Total<br>Booking<br>Charges | Difference | Total Paid<br>Direct | Pre<br>Payments<br>Assigned | Perceived<br>Balance |
|----------------|------------|--------------|--------------------------------|---------|-----------------------------|------------|----------------------|-----------------------------|----------------------|
| DEMO SWIM CLUB | MATT       | 59           | Demo Swim<br>Club Lane<br>Hire | 45      | 45                          | 0          | 0                    | 0                           | 45                   |
| DEMO SWIM CLUB | MATT       | 70           | Test                           | 40      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 70           | Test                           | 40      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 74           |                                | 75      | 55                          | 0          | 0                    | 0                           | 55                   |
| DEMO SWIM CLUB | MATT       | 74           |                                | 75      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 76           |                                | 60      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 76           |                                | 60      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 76           |                                | 60      | 20                          | 0          | 0                    | 0                           | 20                   |
| DIANNE WESTON  |            | 41           | Web booking                    | 45      | 45                          | 45         | 0                    | 0                           | 0                    |
| INDIANA JONES  |            | 2            |                                | 0       | 0                           | 0          | 0                    | 0                           | 0                    |

Facility Booking Charges versus Paid Report From : 1 Jan 1900 To : 22 Oct 2015

Added ability to have no 'From Date' selected allowing for all booking charges to be included.





Test 3 Location 1

| Facility Booking Charges Versus Paid Report From 1 Jan 1900 10:22 Oct 2015 |
|--|
|--|

| Client         | Booking Id | Booking Name | Prime Usage                    | Charges | Total<br>Booking<br>Charges | Difference | Total Paid<br>Direct | Pre<br>Payments<br>Assigned | Perceived<br>Balance |
|----------------|------------|--------------|--------------------------------|---------|-----------------------------|------------|----------------------|-----------------------------|----------------------|
| DEMO SWIM CLUB | MATT       | 59           | Demo Swim<br>Club Lane<br>Hire | 45      | 45                          | 0          | 0                    | 0                           | 45                   |
| DEMO SWIM CLUB | MATT       | 70           | Test                           | 40      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 70           | Test                           | 40      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 74           |                                | 75      | 55                          | 0          | 0                    | 0                           | 55                   |
| DEMO SWIM CLUB | MATT       | 74           |                                | 75      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 76           |                                | 60      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 76           |                                | 60      | 20                          | 0          | 0                    | 0                           | 20                   |
| DEMO SWIM CLUB | MATT       | 76           |                                | 60      | 20                          | 0          | 0                    | 0                           | 20                   |
| DIANNE WESTON  |            | 41           | Web booking                    | 45      | 45                          | 45         | 0                    | 0                           | 0                    |
| INDIANA JONES  |            | 2            |                                | 0       | 0                           | 0          | 0                    | 0                           | 0                    |

#### Prime Usage by Pax

The Prime Usage report can now be run by Pax.

| 8  | Facility Prime                                 | e Usage Report   | _ 🗆 X   |  |  |  |  |  |
|--|--|--|---------|--|--|--|--|--|
| Location: Loc1                                   | <b></b>  |  | Print   |  |  |  |  |  |
| - Selection Criteria                             | - Selection Criteria                           |  |         |  |  |  |  |  |
| From Date: 1 SEP 2015                            | From Date: 1 SEP 2015 D To Date: 31 OCT 2015 D |  |         |  |  |  |  |  |
| Report Format                                    | Output Data                                    | Period Breakdown   | Preview |  |  |  |  |  |
| <ul> <li>Summary</li> <li>By Facility</li> </ul> | ○ Hours In Use                                 | <ul> <li>By Month (* max 12 mths)</li> <li>By Week (* max 12 weeks)</li> </ul> | Close   |  |  |  |  |  |

# By Activity and Month

Test 3 Location 1

Test 3 Location 1

Prime Usage Report - Summary Totals By Month From : 1 Sep 2015 To : 31 Oct 2015

| Activity / PrimeUsage | Sep<br>2015 | Oct<br>2015 |
|-----------------------|-------------|-------------|
|                       | 50          | 0           |
| Program Review        | 0           | 0           |
| Badminton             | 4           | 0           |
| Swimming              | 0           | 0           |
| Basketball            | 10          | 0           |
| Total Pax             | 64          | 0           |

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

By Activity and Week

Prime Usage Report - Summary Totals By Week From : 1 Sep 2015 To : 31 Oct 2015

| Activity / PrimeUsage | 1 Sep | 8 Sep | 15 Sep | 22 Sep | 29 Sep | 6 Oct | 13 Oct | 20 Oct |
|-----------------------|-------|-------|--------|--------|--------|-------|--------|--------|
|                       | 0     | 0     | 50     | 0      | 0      | 0     | 0      | 0      |
| Program Review        | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Badminton             | 0     | 4     | 0      | 0      | 0      | 0     | 0      | 0      |
| Swimming              | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Basketball            | 0     | 0     | 10     | 0      | 0      | 0     | 0      | 0      |
| Total Pax             | 0     | 4     | 60     | 0      | 0      | 0     | 0      | 0      |

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



# By Facility and Week

# Prime Usage Report - Hours of Facility Usage by Type of Activity ByWeek From : 1 Sep 2015 To : 31 Oct 2015

Test 3 Location 1

| Facility : Room 1     |       |       |        |        |        |       |        |        |
|-----------------------|-------|-------|--------|--------|--------|-------|--------|--------|
| Activity / PrimeUsage | 1 Sep | 8 Sep | 15 Sep | 22 Sep | 29 Sep | 6 Oct | 13 Oct | 20 Oct |
|                       | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Program Review        | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Total Pax             | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
|                       |       |       |        |        |        |       |        |        |
| Facility : Court 1    |       |       |        |        |        |       |        |        |
| Activity / PrimeUsage | 1 Sep | 8 Sep | 15 Sep | 22 Sep | 29 Sep | 6 Oct | 13 Oct | 20 Oct |
|                       | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Basketball            | 0     | 0     | 10     | 0      | 0      | 0     | 0      | 0      |
| Total Pax             | 0     | 0     | 10     | 0      | 0      | 0     | 0      | 0      |
|                       |       |       |        |        |        |       |        |        |
| Facility : 50M Lane 1 |       |       |        |        |        |       |        |        |
| Activity / PrimeUsage | 1 Sep | 8 Sep | 15 Sep | 22 Sep | 29 Sep | 6 Oct | 13 Oct | 20 Oct |
|                       | 0     | 0     | 40     | 0      | 0      | 0     | 0      | 0      |
| Swimming              | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Total Pax             | 0     | 0     | 40     | 0      | 0      | 0     | 0      | 0      |
|                       |       |       |        |        |        |       |        |        |
| Facility : 50M Lane 2 |       |       |        |        |        |       |        |        |
| Activity / PrimeUsage | 1 Sep | 8 Sep | 15 Sep | 22 Sep | 29 Sep | 6 Oct | 13 Oct | 20 Oct |
|                       | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Swimming              | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |
| Total Pax             | 0     | 0     | 0      | 0      | 0      | 0     | 0      | 0      |

By Facility and Month

Test 3 Location 1

# Prime Usage Report - Hours of Facility Usage by Type of Activity ByMonth From : 1 Sep 2015 To : 31 Oct 2015

| Facility : Room 1     |                       |             |  |  |  |  |  |  |
|-----------------------|-----------------------|-------------|--|--|--|--|--|--|
| Activity / PrimeUsage | Sep<br>2015           | Oct<br>2015 |  |  |  |  |  |  |
|                       | 0                     | 0           |  |  |  |  |  |  |
| Program Review        | 0                     | 0           |  |  |  |  |  |  |
| Total Pax             | 0                     | 0           |  |  |  |  |  |  |
| Facility : Court 1    |                       |             |  |  |  |  |  |  |
| Activity / PrimeUsage | Sep<br>2015           | Oct<br>2015 |  |  |  |  |  |  |
|                       | 0                     | 0           |  |  |  |  |  |  |
| Basketball            | 10                    | 0           |  |  |  |  |  |  |
| Total Pax             | 10                    | 0           |  |  |  |  |  |  |
| Facility : 50M Lane 1 | Facility : 50M Lane 1 |             |  |  |  |  |  |  |
| Activity / PrimeUsage | Sep<br>2015           | Oct<br>2015 |  |  |  |  |  |  |
|                       | 40                    | 0           |  |  |  |  |  |  |
|                       |                       |             |  |  |  |  |  |  |
| Swimming              | 0                     | 0           |  |  |  |  |  |  |



#### Pax on Centre Attendance Breakdown

Pax has the ability to record on the Centre Attendance breakdown report. This enables you not to sell a free service for those who attend facility bookings that are not charged, or alternatively compare those who paid and didn't for a particular service sold.

| Centre Attendance Breakdown   | ×       |
|---|---------|
| Location: Loc1  | Print   |
| Selection Criteria  | Export  |
| 5 MAY 2013 D and 22 OCT 2015 D  | Graph   |
| ** Enter same dates for Hourly Report   | Preview |
|   | Close   |
| Facility Booking Pax  |         |
| ✓ Include Facility Booking Pax  |         |
| Breakdown by Facility   |         |
| C Breakdown by Prime Usage  |         |
| L Services — Services | ]       |
| Service Code Description  |         |
|   |         |
|   |         |
|   |         |
|   |         |
|   |         |
| <u>S</u> earch <u>C</u> lear  |         |

Test 3 Location 1

#### Centre Attendance Breakdown Report [Location Loc1] for customers attending between 5 MAY 2013 and 22 OCT 2015

| Facility       | Pax |
|----------------|-----|
| BADMINTION 1   | 9   |
| BIRTHDAY PARTY | 1   |
| COS            | 4   |
| Court 1        | 10  |
| GEOFF 30MIN    | 8   |
| GEOFF 60 MIN   | 1   |
| HEALTH CLUB    | 4   |
| Room 1         | 0   |

Total Pax: 102

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



# Ability to now Export the Voucher Liability Report

You now have the ability to export the Voucher Liability Report.

| Ξ,  |  | Voucher Liabilit | y Report                    | ×                                   |  |                             |            |               |
|-----|--|------------------|-----------------------------|-------------------------------------|--|-----------------------------|------------|---------------|
| S   | election Criteria<br>As At Date:<br>Is Credit Not<br>C Yes<br>C No | 21 OCT 2015      |                             | Print<br>Export<br>Graph<br>Preview |  |                             |            |               |
|     |  |                  |                             | Close                               |  |                             |            |               |
| XI  | ۍ ج  | ⊘                |                             |                                     |  |                             |            |               |
| FI  | LE HOM   | IE INSERT F      | PAGE LAYOUT                 | FORMULAS                            | DATA REVIE                                   | W VIEW                      |            |               |
| Pas | u K Cut<br>□ E Copy<br>te  | Calibri<br>B I   | - 11<br><u>U</u>   <u>2</u> |                                     | = <b>_ ≫</b> .<br>= = <b></b> € <del>2</del> | 🖶 Wrap Text<br>Merge & Cent | Gen        | eral<br>- % 1 |
| Ť   | Clipboard  | raintei آيا      | Font                        | E.                                  | Align  | ment                        | G.         | Numb          |
| C8  |  | : X 🗸            | fx                          |                                     |  |                             |            |               |
|     | А  | В                | С                           | D                                   | E  | F                           | G          | Н             |
| 1   | Voucher No   | Customer Name    | Is Credit Note              | Expiry Date                         | Initial Amount.\$                            | Amount Used.\$              | Balance.\$ |               |
| 2   | 1  | BLINKY BILL      | NO                          |                                     | \$50.00                                      | \$0.00                      | \$50.00    |               |
| 3   |  |                  |                             |                                     |  |                             |            |               |
| 4   |  | Total            |                             |                                     |  |                             | \$50.00    |               |
| 5   |  |                  |                             |                                     |  |                             |            |               |
| 7   |  |                  |                             |                                     |  |                             |            |               |
| 8   |  |                  |                             |                                     |  |                             |            |               |



# Additional Switch for the Void Transaction Report

This report now allows you to show either the Void Date or Transaction Date

| ₿.            | Void Transactions                   | X       |
|---------------|-------------------------------------|---------|
| C Selection C | riteria                             | Print   |
| From Date:    | D                                   | Export  |
| To Date:      | D                                   | Graph   |
|               | Display Details<br>Extended Details | Preview |
|               | I Include GST in totals             | Close   |
|               | Transaction Date                    |         |
|               | C Void Date                         |         |
|               |                                     |         |

- Transaction Date: will show the date of when the original transaction occurred
- Void Date: the date the void actually occurred

Report Preview – Transaction Date Flagged

#### Void Transaction Summary Report

#### From 11 JAN 2016 to 11 JAN 2016

# TILL1

| Till  | Date      | Time  | No | Amount,\$ | Staff | Reason       |
|-------|-----------|-------|----|-----------|-------|--------------|
| TILL1 | 11 Jan 16 | 12:31 | 4  | \$10.00   | 1     | CANCELLATION |
| TILL1 | 11 Jan 16 | 13:10 | 15 | \$60.00   | 1     | TEST         |
|       | TOTAL     |       |    | \$70.00   |       |              |

#### Grand Total: \$70.00

Report Preview – Void Date Flagged

#### Void Transaction Summary Report

#### From 11 JAN 2016 to 11 JAN 2016

TILL1

| Till  | Date      | Time  | No | Amount,\$ | Staff | Reason       |
|-------|-----------|-------|----|-----------|-------|--------------|
| TILL1 | 08 Jan 16 | 16:56 | 3  | \$240.00  | 1     | TEST         |
| TILL1 | 11 Jan 16 | 12:31 | 4  | \$10.00   | 1     | CANCELLATION |
| TILL1 | 11 Jan 16 | 13:10 | 15 | \$60.00   | 1     | TEST         |
|       | TOTAL     |       |    | \$310.00  |       |              |

#### Grand Total: \$310.00