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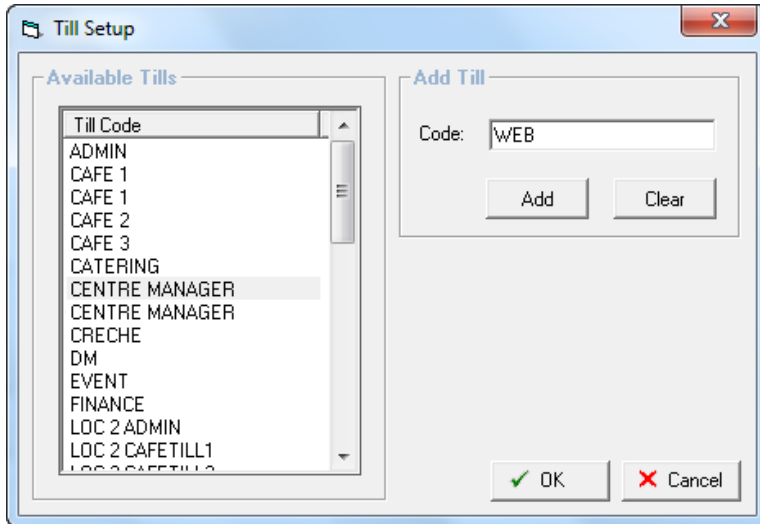
Setting up Links for Active Carrot

Prior to setting up what you are going to sell through Active Carrot you must complete the following through Links.

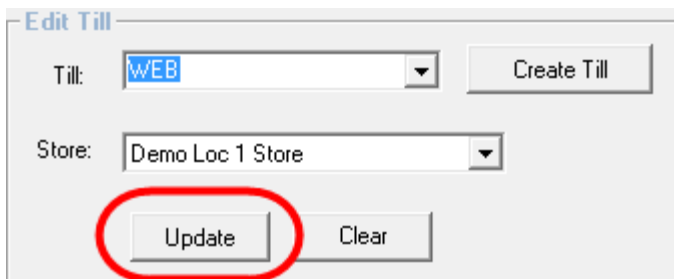
Set up a Web Till

To set up a Web Till go to Admin> Site> Other Site Parameters/Set up Locations> Tills

1. Add a new till



2. Set it up for which store you will be selling stock from through Active Carrot



3. Add it to the Web Applications Till Id

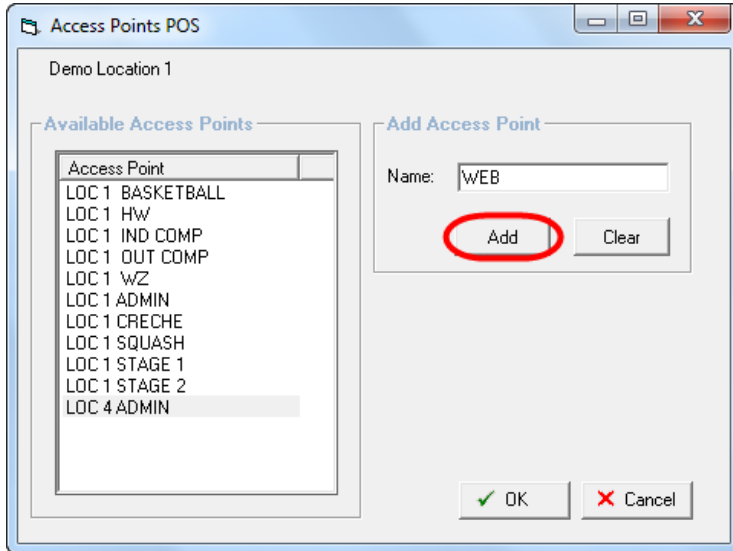


If you have more than one location, you will need to complete this for each site.

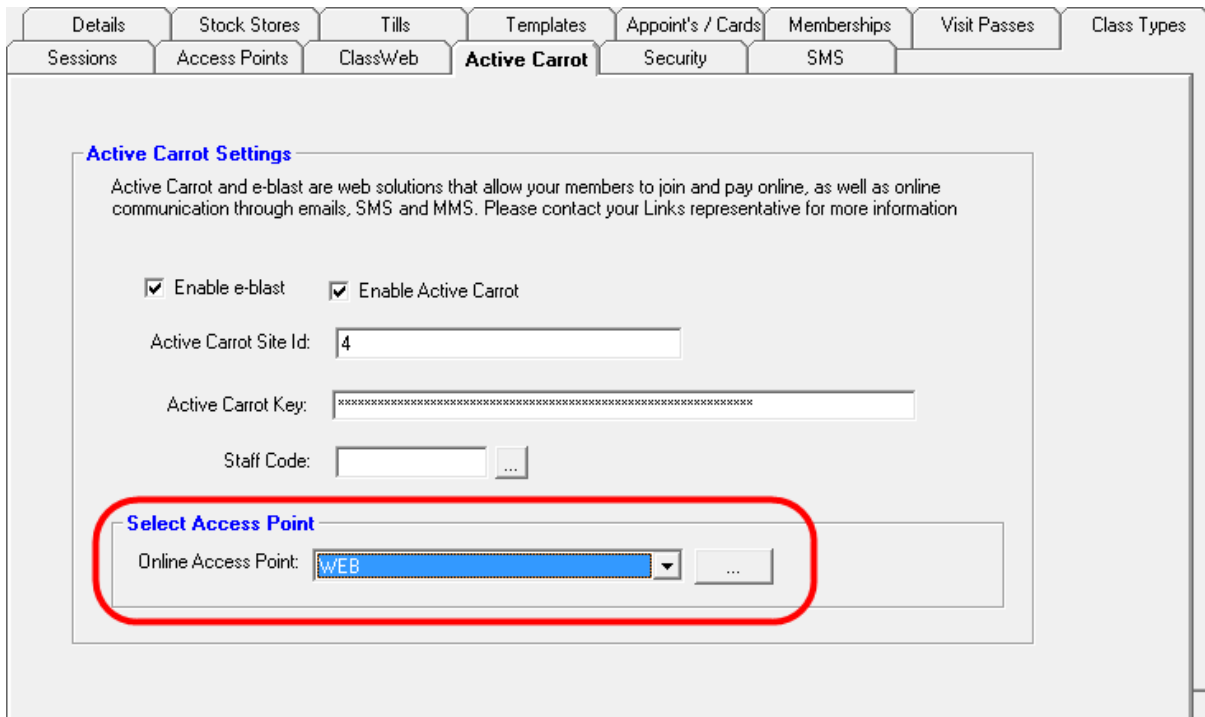
Set up an Online Access Point

At the moment the way Session bookings work in Active Carrot, it adds an attendance, therefore you must choose where you want to 'attend' online Session bookings.

To set up an Access Point go to Admin> Admin> Access Points.



Once you have set up an Access Point you need to go to Admin> Site> Other Site Parameters/Set up Locations> Active Carrot and select a Online Access Point.

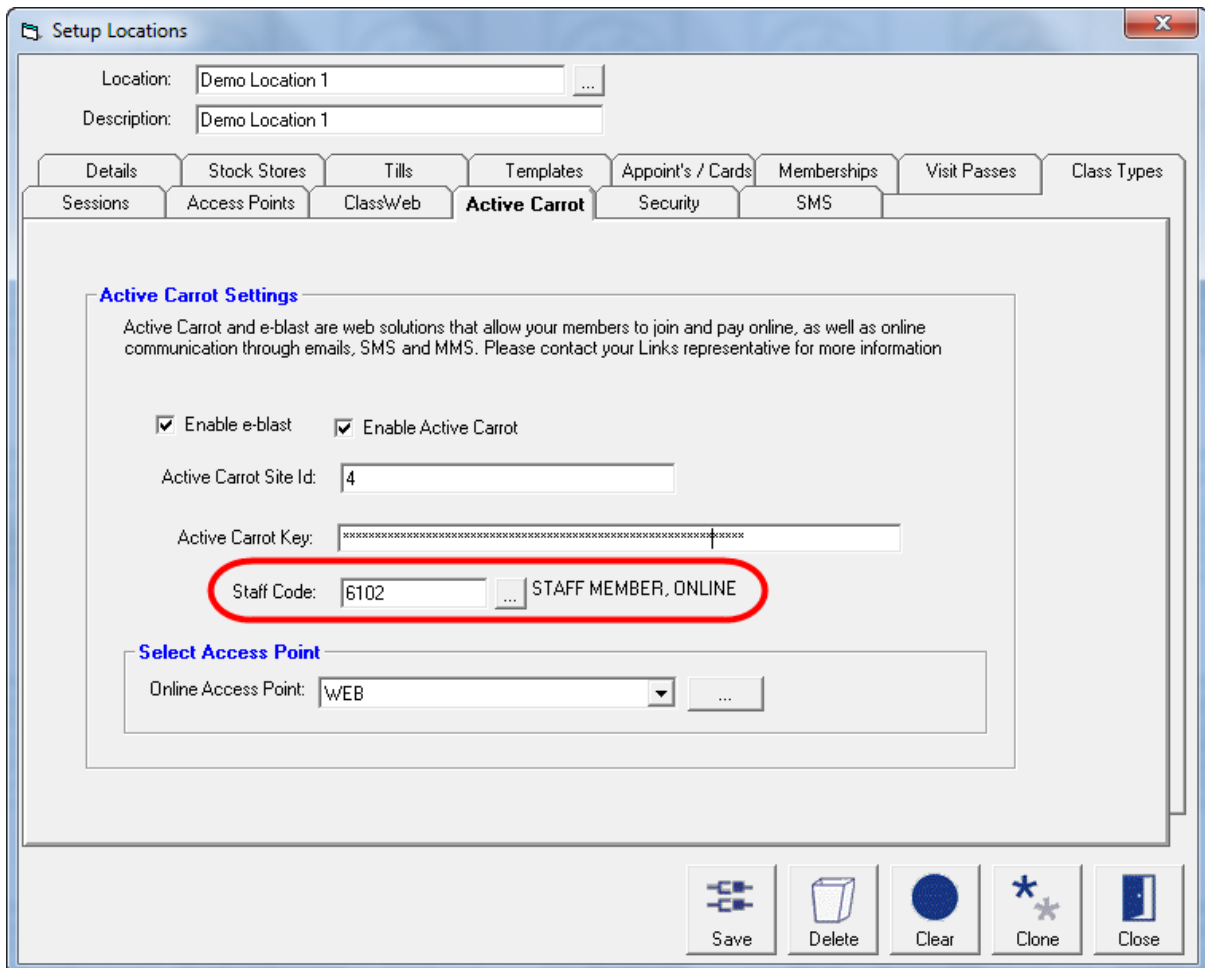


Set up a Staff Member

When reporting on actions performed through Active Carrot, some reports show a Staff Member that performed an action, for example, a new Membership sale. Therefore you need to have an 'Online Staff Member' set up for Active Carrot.

To set up a new staff member, please refer to the Admin User Guide.

Once you have set up a new staff member go to Admin> Site> Other Site Parameters/Set up Locations> Active Carrot and use the search field to search for your online Staff Member.



The screenshot shows the 'Setup Locations' window with the 'Active Carrot' tab selected. The 'Active Carrot Settings' section includes the following fields and options:

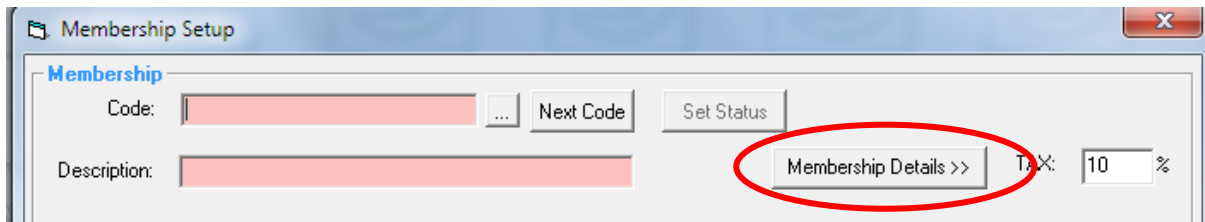
- Enable e-blast
- Enable Active Carrot
- Active Carrot Site Id: 4
- Active Carrot Key: [Redacted]
- Staff Code: 6102 (highlighted with a red circle) [Dropdown: STAFF MEMBER, ONLINE]
- Select Access Point: Online Access Point: WEB [Dropdown]

At the bottom of the window, there are five buttons: Save, Delete, Clear, Clone, and Close.

Memberships in Links

Entering your Membership descriptions

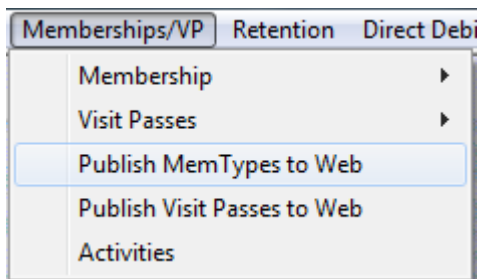
If you wish to, you can have a short description of the membership that displays online. To enter this information you will need to add this to the comments field of the Membership Type setup (in the membership details).



Publishing your Memberships

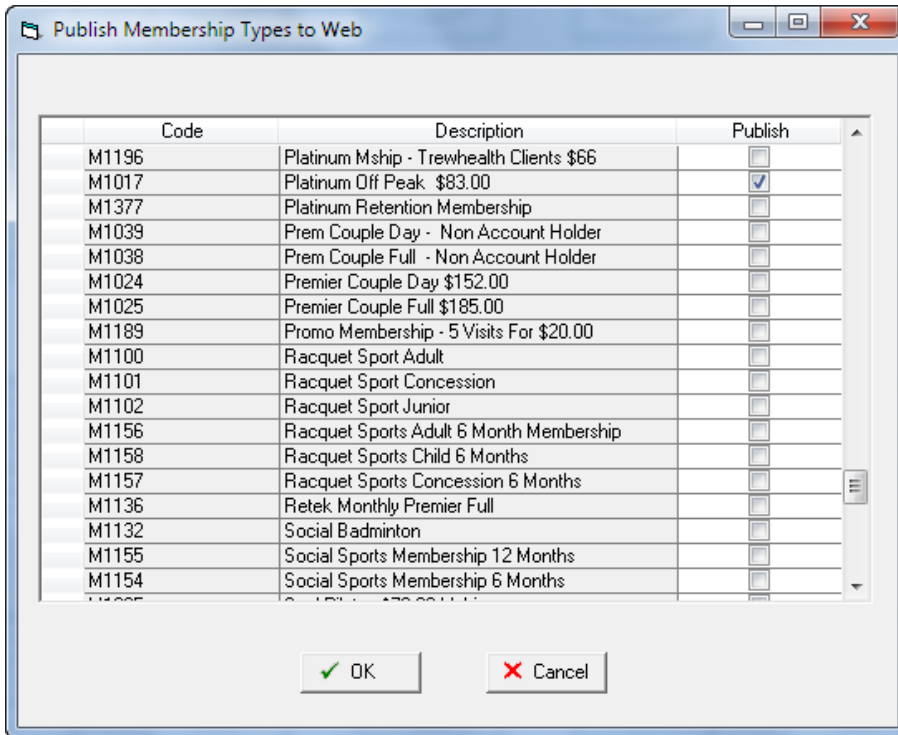
Before your customers can purchase memberships online, you will need to specify which of your Membership Types can actually be purchased online.

To do this go to Admin>Memberships/VP> Publish Mem Types to Web



You may want to consider the names of your membership types as these may be internal, but now that you are selling online, you will need to be aware that it needs to be something that makes sense to your customers.

For those you want to sell online, click on 'Publish', then click on OK

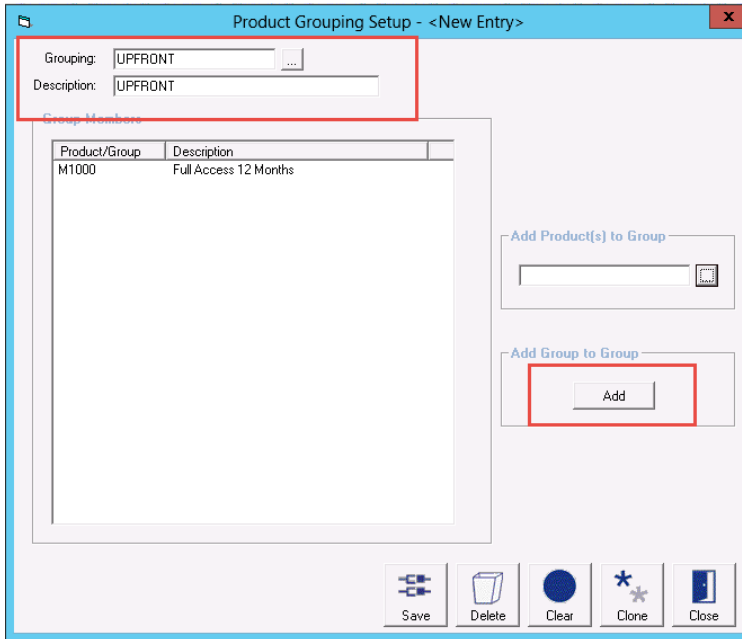


Please note once you have setup membership types for online purchase you will need to visit the club portal through the manager login and press the Clear Cache button. This must be setup one day prior to you want to make online sales as a minimum.

Membership URL Groupings

You can have membership types grouped based upon a product group in Links. By using grouping you are able to specify terms and conditions for each membership group and use a separate URL per membership group.

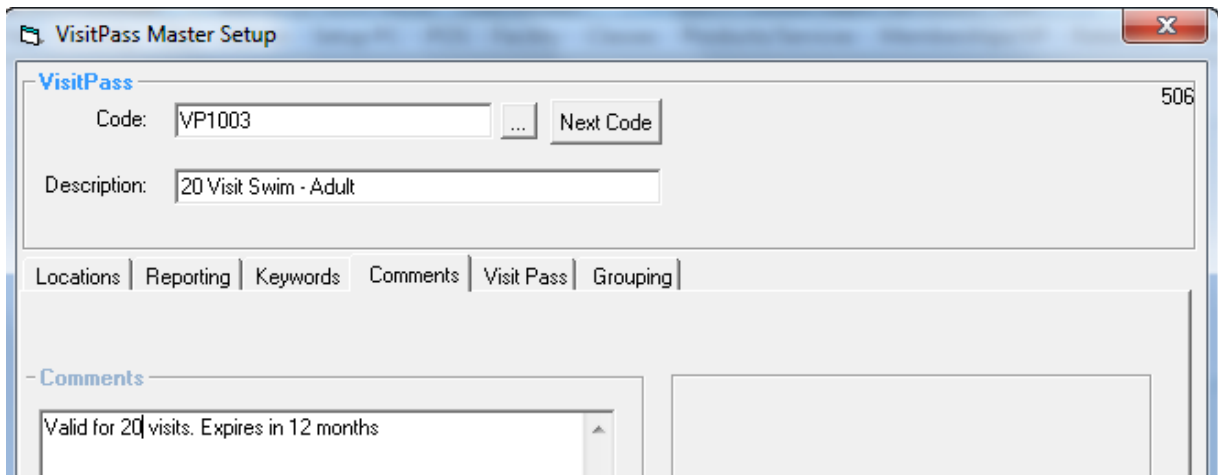
To set this up in Links go to Admin> Products/Services> Groupings.



Visit Passes in Links

Entering your Visit Passes descriptions

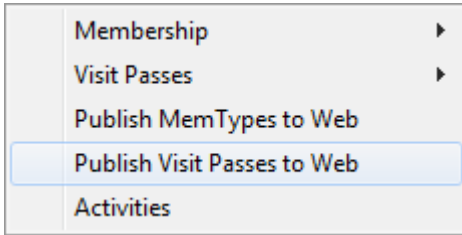
If you wish to, you can have a short description of the Visit Pass that displays online. To enter this information you will need to add this to the comments field of the Visit Pass Type setup (in the Visit Pass details).



Publishing your Visit Passes

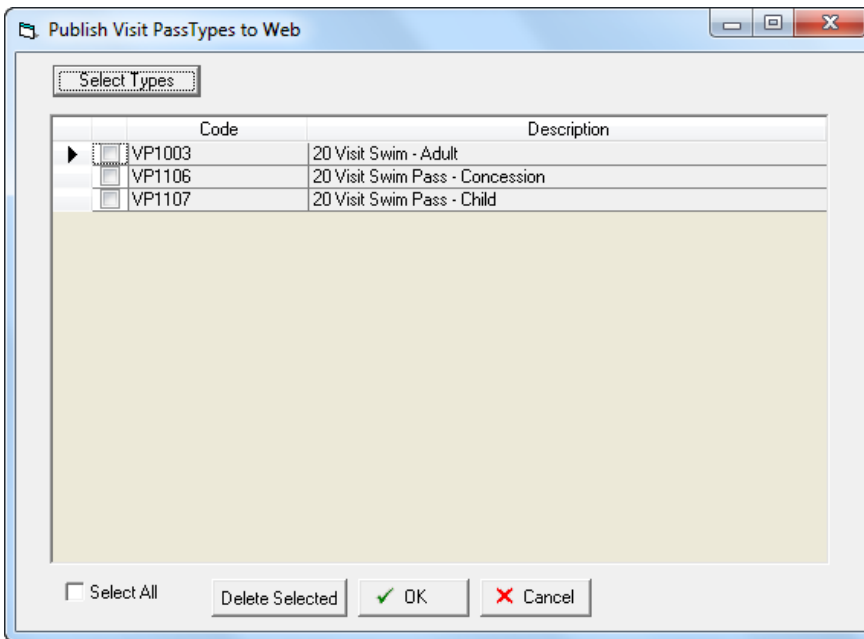
Before your customers can purchase Visit Passes online, you will need to specify which of your Visit Pass Types can actually be purchased online.

To do this go to Admin>Memberships/VP> Publish Visit Passes to Web



You may want to consider the names of your Visit Pass types as these may be internal, but now that you are selling online, you will need to be aware that it needs to be something that makes sense to your customers.

For those you want to sell online, click on 'Publish', then click on OK

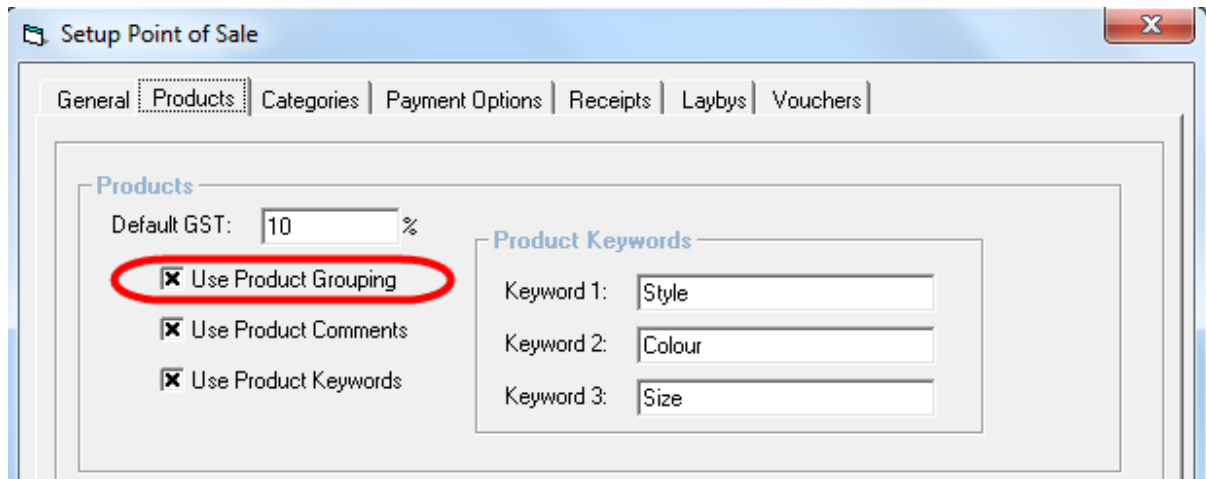


Please note once you have setup Visit Pass types for online purchase you will need to visit the club portal through the manager login and press the Clear Cache button. This must be setup one day prior to you want to make online sales as a minimum.

Products and Services in Links

When setting up Products and Services in Links to be sold online, you need to set up Grouping in Links. Grouping is used to link together Products and Services which will then define the buttons within the Active Carrot Product Sales.

The items that make up the group must first be created. You may need to turn grouping on first in Admin>POS>Setup> Products tab

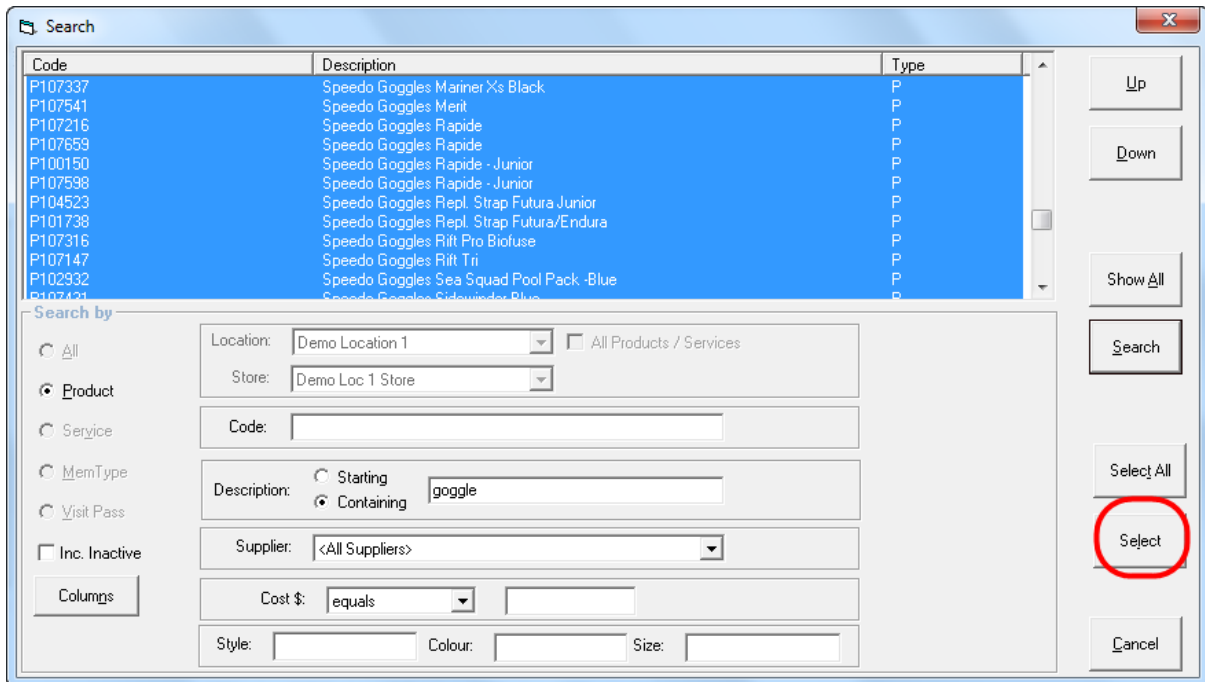


The screenshot shows the 'Setup Point of Sale' window with the 'Products' tab selected. The 'Default GST' is set to 10%. The 'Use Product Grouping' checkbox is checked and highlighted with a red circle. Other checked options include 'Use Product Comments' and 'Use Product Keywords'. The 'Product Keywords' section has three input fields: 'Keyword 1' with 'Style', 'Keyword 2' with 'Colour', and 'Keyword 3' with 'Size'.

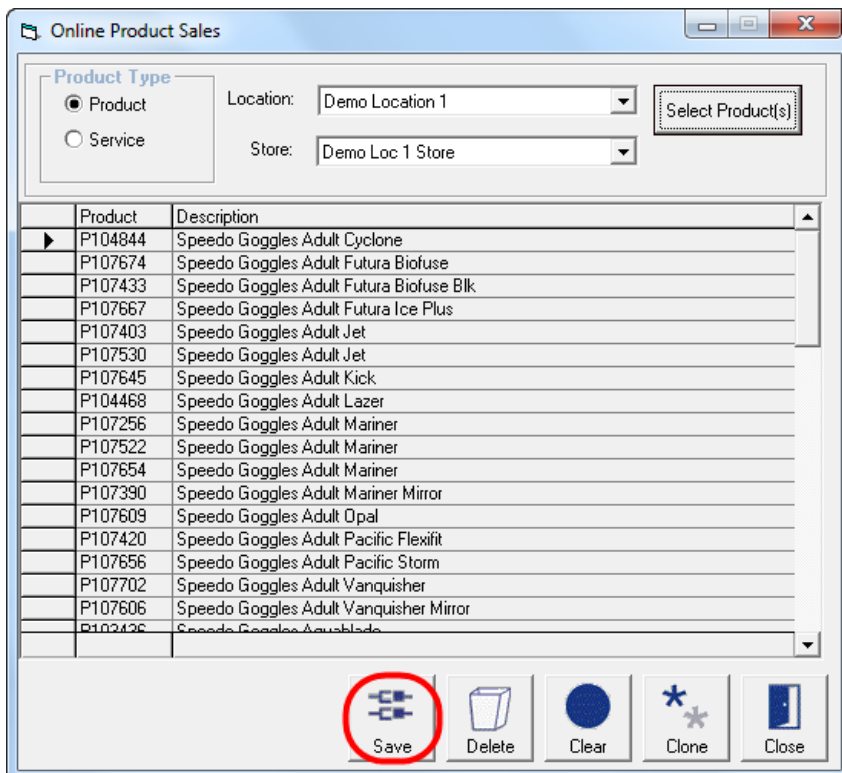
To set up Grouping, go to Admin> Products/Services> Groupings

1. Enter in a Grouping Name and Description
2. Select the Products using the 3 dots that will be under that button in Product Sales. Note you can select multiple products at a time.
3. Once you have selected all the Products you wish to be under this specific Grouping which will appear on Online Product Sales, press Save
4. Repeat as needed

- Select the products/services you want to sell online. Note you can select multiple products/services at a time.



Code	Description	Type
P107337	Speedo Goggles Mariner Xs Black	P
P107541	Speedo Goggles Merit	P
P107216	Speedo Goggles Rapide	P
P107659	Speedo Goggles Rapide	P
P100150	Speedo Goggles Rapide - Junior	P
P107598	Speedo Goggles Rapide - Junior	P
P104523	Speedo Goggles Repl. Strap Futura Junior	P
P101738	Speedo Goggles Repl. Strap Futura/Endura	P
P107316	Speedo Goggles Riit Pro Biofuse	P
P107147	Speedo Goggles Riit Tri	P
P102932	Speedo Goggles Sea Squad Pool Pack -Blue	P
P107431	Speedo Goggles Sidewinder Plus	P



Product	Description
P104844	Speedo Goggles Adult Cyclone
P107674	Speedo Goggles Adult Futura Biofuse
P107433	Speedo Goggles Adult Futura Biofuse Blk
P107667	Speedo Goggles Adult Futura Ice Plus
P107403	Speedo Goggles Adult Jet
P107530	Speedo Goggles Adult Jet
P107645	Speedo Goggles Adult Kick
P104468	Speedo Goggles Adult Lazer
P107256	Speedo Goggles Adult Mariner
P107522	Speedo Goggles Adult Mariner
P107654	Speedo Goggles Adult Mariner
P107390	Speedo Goggles Adult Mariner Mirror
P107609	Speedo Goggles Adult Opal
P107420	Speedo Goggles Adult Pacific Flexifit
P107656	Speedo Goggles Adult Pacific Storm
P107702	Speedo Goggles Adult Vanquisher
P107606	Speedo Goggles Adult Vanquisher Mirror
P102436	Speedo Goggles Asuabla

- Once you are happy with the Products and Services you have selected, press save.

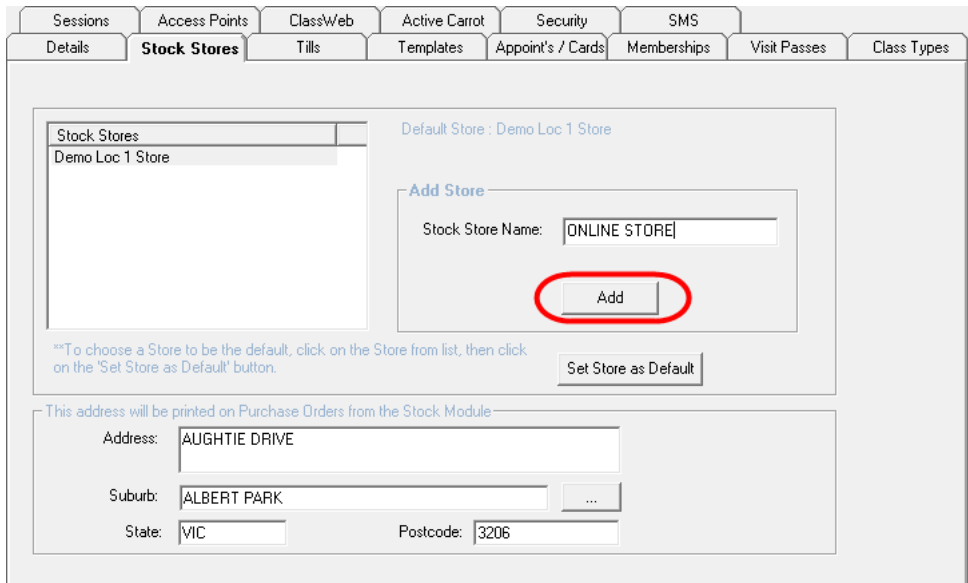
NOTE: If you have access points such as a turnstile and are going to sell casual entries online, you will need to contact Links Support to have barcode printing activated.

Stores in Links

If you are selling merchandise online, you may wish to set up another store to sell this out of, allowing you to control online stock and also giving you the ability to have products set up at a different price to what you would sell it at the Centre.

To set up an additional store for Active Carrot sales, please follow these instructions:

1. Go to Admin> SiteMenu> OtherSiteParameters/SetupLocation
2. Select the Stock Stores tab



Sessions | Access Points | ClassWeb | Active Carrot | Security | SMS
 Details | **Stock Stores** | Tills | Templates | Appoint's / Cards | Memberships | Visit Passes | Class Types

Stock Stores
 Demo Loc 1 Store

Default Store: Demo Loc 1 Store

Add Store

Stock Store Name:

Add

Set Store as Default

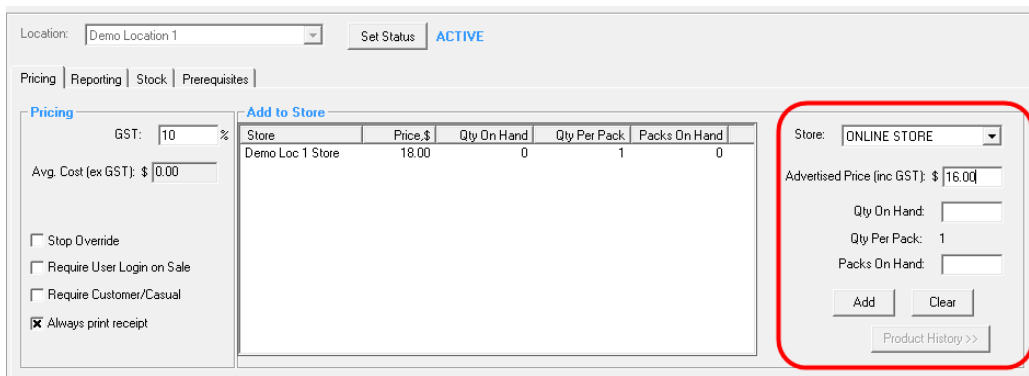
**To choose a Store to be the default, click on the Store from list, then click on the 'Set Store as Default' button.

This address will be printed on Purchase Orders from the Stock Module:

Address:
 Suburb: ...
 State: Postcode:

3. Make sure that the field on the right hand side is titled Add Store
4. Enter a store name i.e. Online Store
5. Click on the Add button

Once you have added the store, you are now able to go into the Products you are going to sell online and add these to be sold at that store (with a different price if you wish)



Location: Set Status: **ACTIVE**

Pricing | Reporting | Stock | Prerequisites

Pricing

GST: %
 Avg. Cost (ex GST): \$

Stop Override
 Require User Login on Sale
 Require Customer/Casual
 Always print receipt

Add to Store

Store	Price,\$	Qty On Hand	Qty Per Pack	Packs On Hand
Demo Loc 1 Store	18.00	0	1	0

Store:

Advised Price (inc GST): \$

Qty On Hand:
 Qty Per Pack:
 Packs On Hand:

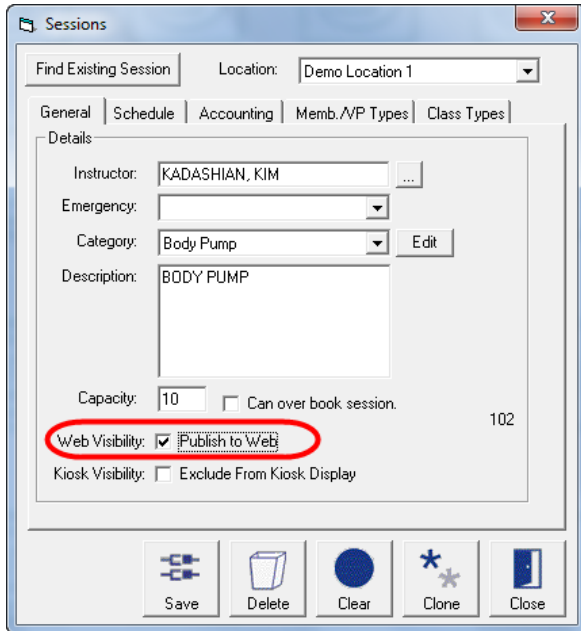
Add **Clear**

[Product History >>](#)

If you are going to sell stock through an 'Online' store through Active Carrot, you will need to add the 'Web' till that you have previously set up at the beginning of this document to this Store.

Sessions in Links

To set what Sessions can be booked to online, you will need to go into each session and select 'Web Visibility' Publish to Web box.



Sessions

Find Existing Session Location: Demo Location 1

General | Schedule | Accounting | Memb./VP Types | Class Types

Details

Instructor: KADASHIAN, KIM

Emergency: [Dropdown]

Category: Body Pump Edit

Description: BODY PUMP

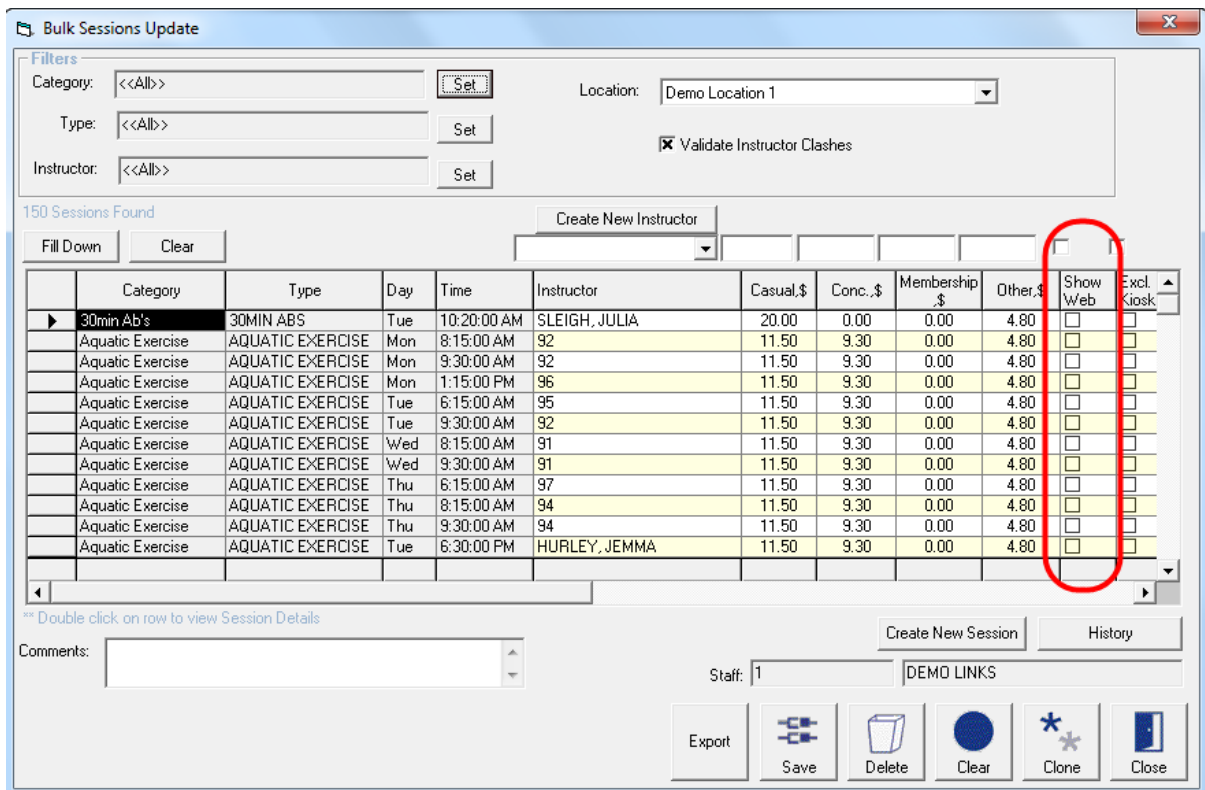
Capacity: 10 Can over book session. 102

Web Visibility: Publish to Web

Kiosk Visibility: Exclude From Kiosk Display

Save Delete Clear Clone Close

This can also be done in bulk through Admin > Sessions > Bulk Sessions Update



Bulk Sessions Update

Filters

Category: <<All> Set Location: Demo Location 1

Type: <<All> Set

Instructor: <<All> Set Validate Instructor Clashes

150 Sessions Found Create New Instructor

Fill Down Clear

	Category	Type	Day	Time	Instructor	Casual,\$	Conc.,\$	Membership,\$	Other,\$	Show Web	Excl. Kiosk
▶	30min Ab's	30MIN ABS	Tue	10:20:00 AM	SLEIGH, JULIA	20.00	0.00	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Mon	8:15:00 AM	92	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Mon	9:30:00 AM	92	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Mon	1:15:00 PM	96	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Tue	6:15:00 AM	95	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Tue	9:30:00 AM	92	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Wed	8:15:00 AM	91	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Wed	9:30:00 AM	91	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Thu	6:15:00 AM	97	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Thu	8:15:00 AM	94	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Thu	9:30:00 AM	94	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>
	Aquatic Exercise	AQUATIC EXERCISE	Tue	6:30:00 PM	HURLEY, JEMMA	11.50	9.30	0.00	4.80	<input type="checkbox"/>	<input type="checkbox"/>

** Double click on row to view Session Details

Comments: [Text Area]

Staff: 1 DEMO LINKS

Create New Session History

Export Save Delete Clear Clone Close

Facility in Links

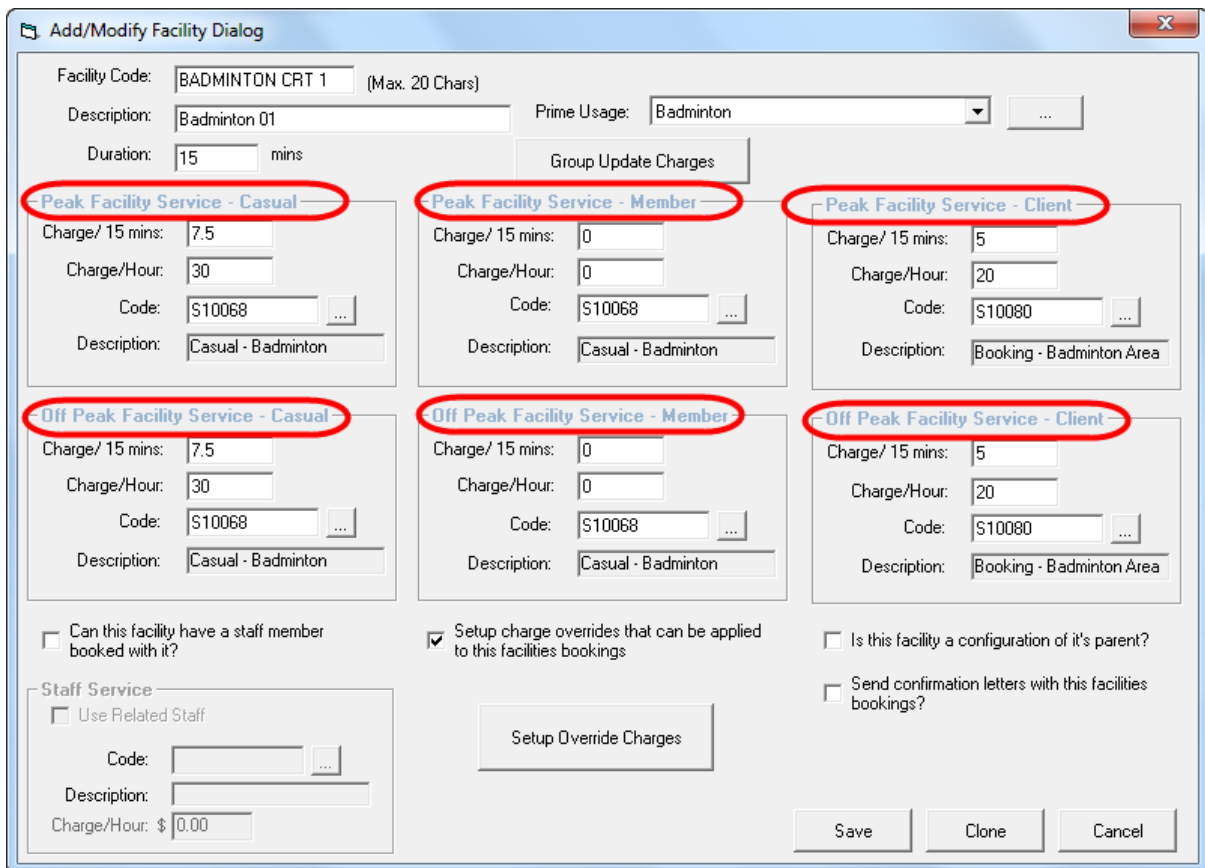
Pricing

When setting your pricing in Facility setup, there is the option for three pricing options:

- Casual
- Members***
- Client

***This does not mean everyone that holds a Membership gets the Member pricing. The Membership Types considered a Member for Facility bookings is who you set to have Member pricing in the Memberships screen in Settings. This is covered in the next part of this document.

Admin > Facility > Setup Facilities > Modify Facility



The screenshot shows the 'Add/Modify Facility Dialog' window. The facility is 'BADMINTON CRT 1' with a description of 'Badminton 01' and a duration of 15 minutes. The prime usage is 'Badminton'. There are three pricing sections, each with a red circle around the title:

- Peak Facility Service - Casual:** Charge/15 mins: 7.5, Charge/Hour: 30, Code: \$10068, Description: Casual - Badminton.
- Peak Facility Service - Member:** Charge/15 mins: 0, Charge/Hour: 0, Code: \$10068, Description: Casual - Badminton.
- Peak Facility Service - Client:** Charge/15 mins: 5, Charge/Hour: 20, Code: \$10080, Description: Booking - Badminton Area.
- Off Peak Facility Service - Casual:** Charge/15 mins: 7.5, Charge/Hour: 30, Code: \$10068, Description: Casual - Badminton.
- Off Peak Facility Service - Member:** Charge/15 mins: 0, Charge/Hour: 0, Code: \$10068, Description: Casual - Badminton.
- Off Peak Facility Service - Client:** Charge/15 mins: 5, Charge/Hour: 20, Code: \$10080, Description: Booking - Badminton Area.

Additional options include:

- Can this facility have a staff member booked with it?
- Setup charge overrides that can be applied to this facilities bookings
- Is this facility a configuration of it's parent?
- Send confirmation letters with this facilities bookings?
- Staff Service:** Use Related Staff, Code: [], Description: [], Charge/Hour: \$ 0.00
- Buttons:** Group Update Charges, Setup Override Charges, Save, Clone, Cancel.

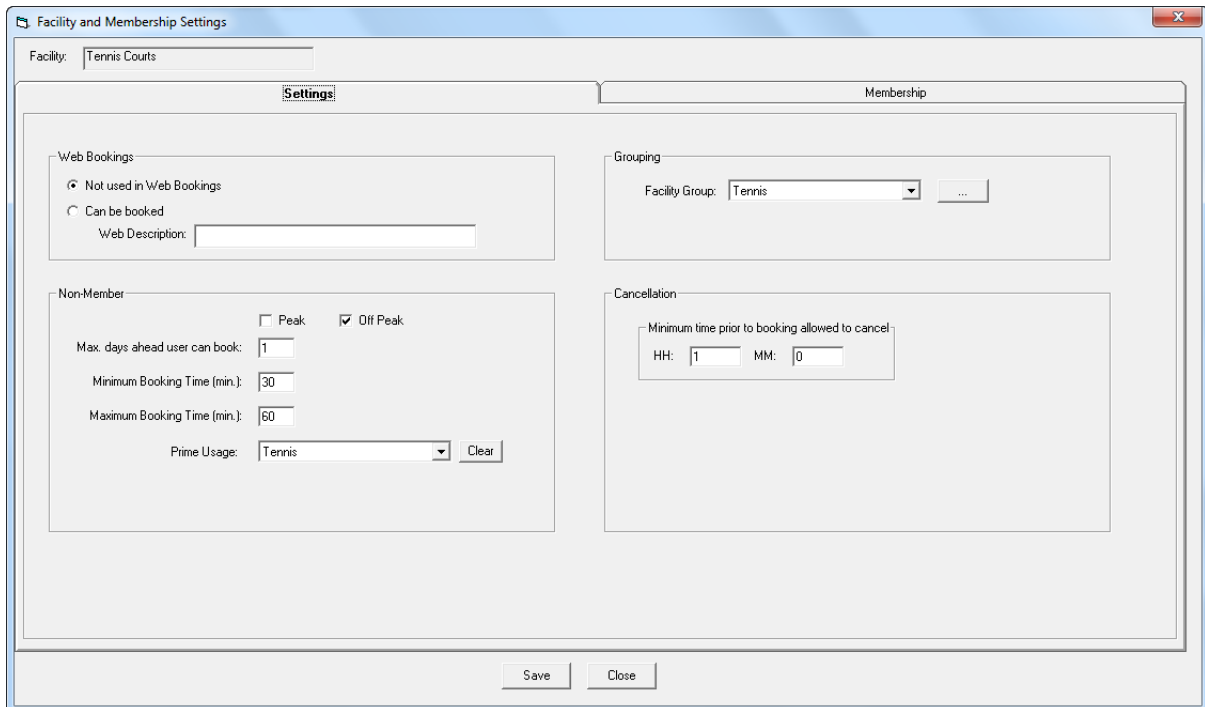
Facility and Membership Settings

There is now added functionality under the Facility Setup to cater for usage online in Active Carrot and usage by Members and Casuals.

We suggest you make the changes to the Parent Facility as these can be pushed to the Children Facilities. Once you have done this, you can make applicable changes to the Parent Facility.

Go to Admin > Facility > Setup Facilities > Settings

Settings



Facility and Membership Settings

Facility: Tennis Courts

Settings

Web Bookings

Not used in Web Bookings
 Can be booked
 Web Description:

Non-Member

Peak Off Peak

Max. days ahead user can book:
 Minimum Booking Time (min.):
 Maximum Booking Time (min.):
 Prime Usage:

Grouping

Facility Group:

Cancellation

Minimum time prior to booking allowed to cancel:

HH: MM:

Web Bookings

Designates use online by Active Carrot and the label that displays on the web.

Grouping

This defines the section that the Facility is assigned to display online with Active Carrot and is used to complete the structure for Activity Use Limits. See the example scenarios for how to set this up.

Cancellation

Users can enter the minimum time prior to the booking starting that a Customer can cancel a Facility booking through Active Carrot.

Non Member

A Non Member is defined as anyone who doesn't hold a valid Membership against the Facility in the Membership Settings screen, a Responsible Person, Student, Visit Pass Holder or Casual.

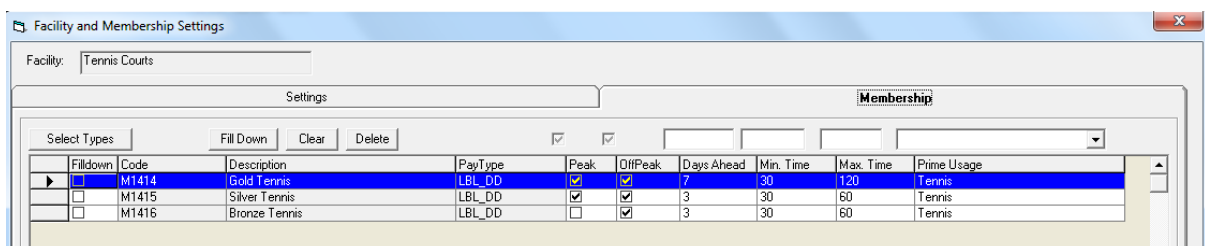
Here you set the parameters by which Non Members/Casuals can book this Facility.

Peak	Select if bookings can be made in peak times (Peak times are set up in Facility set up)
Off Peak	Select if bookings can be made in off peak times (Off Peak times are set up in Facility set up)
Max Days ahead a user can book	Enter how many days ahead that a booking can be made by a Non Member
Minimum booking time	Enter the least amount of time a Non Member can book for in any one booking
Maximum booking time	Enter the most amount of time a Non Member can book for in any one booking
Prime Usage	This is the Prime Usage that will be used for Non Member bookings (for more information on Prime Usage, please refer to the Facility User Guide)

Membership

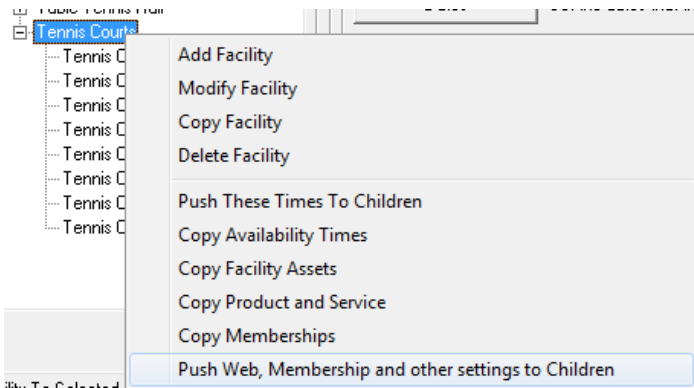
There is the ability now to designate booking availability by Membership Type for each Facility. As above for the Non Members this includes:

- Whether they get the Member rate when they book in Peak times
- Whether they get the Member rate when they book in Off Peak times
- How many days ahead they can make a booking
- The minimum and maximum times in minutes they can book for
- The ability to use a different prime usage for each Membership Type



Filldown	Code	Description	PayType	Peak	OffPeak	Days Ahead	Min. Time	Max. Time	Prime Usage
<input checked="" type="checkbox"/>	M1414	Gold Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	30	120	Tennis
<input type="checkbox"/>	M1415	Silver Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Tennis
<input type="checkbox"/>	M1416	Bronze Tennis	LBL_DD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Tennis

Once you have set these up, the rules can be pushed to the Facilities Children

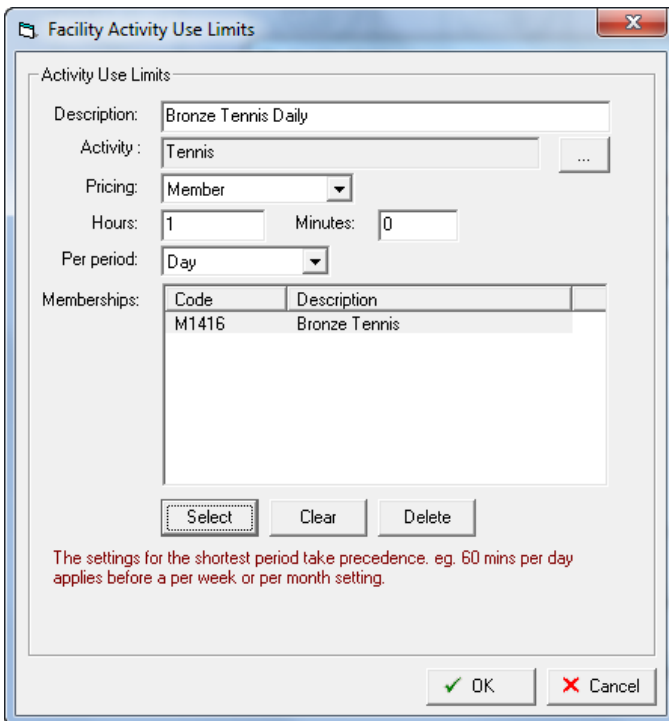


Facility Activity Use Limits

Each Facility is assigned an Activity which links them together for limits on use by Non Members and by Membership Type. The limits are then set through the 'Facility Activity Use Limits' screen.

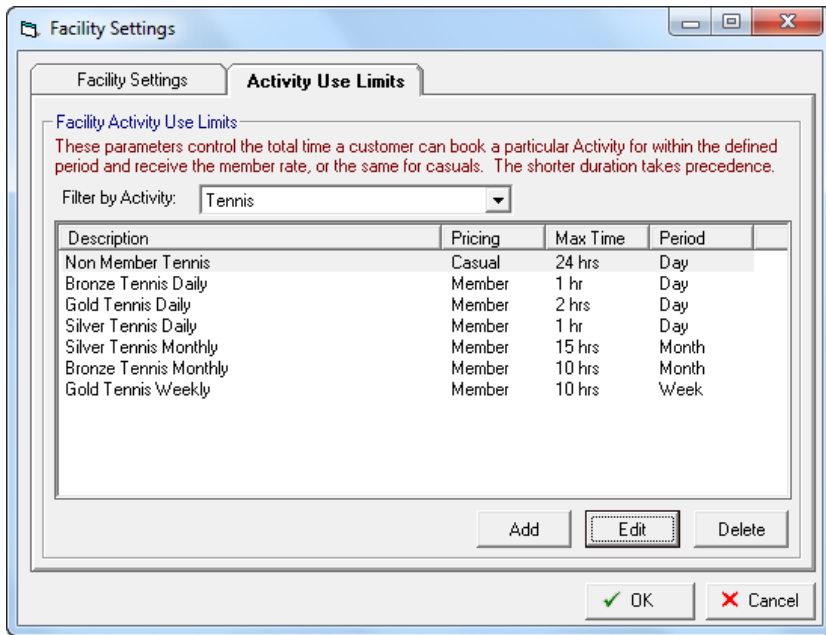
The limits are set by designating limits by day, week, month or/and year and assigning that to Membership Types or Casual. You can have multiple limits per Activity for multiple Membership Types. For more information on how to set these up, please refer to the example scenarios.

Admin > Facility > Facility Settings > Activity Use Limits



Description	Enter a description for the Activity Use Limit
-------------	--

Activity	Select an Activity for the limit
Pricing	Select if this limit is for Casual or Member pricing
Hours	Select the limit of how many hours they can book for
Minutes	Select the limit of how many minutes they can book for
Per Period	Select if the limit is Daily, Weekly, Monthly or Yearly
Memberships	If setting up Member limits, select which Membership Types this limit applies to



If they exceed the Member limit, it will charge the Non Member/Casual rate. Once they have exceeded the Member and Non Member/Casual limits, it will restrict the Customer from exceeding the limits when booking through the Active Carrot Customer Portal.

Please see below for 3 scenarios for setting up your Facility for Active Carrot bookings.

Scenario One

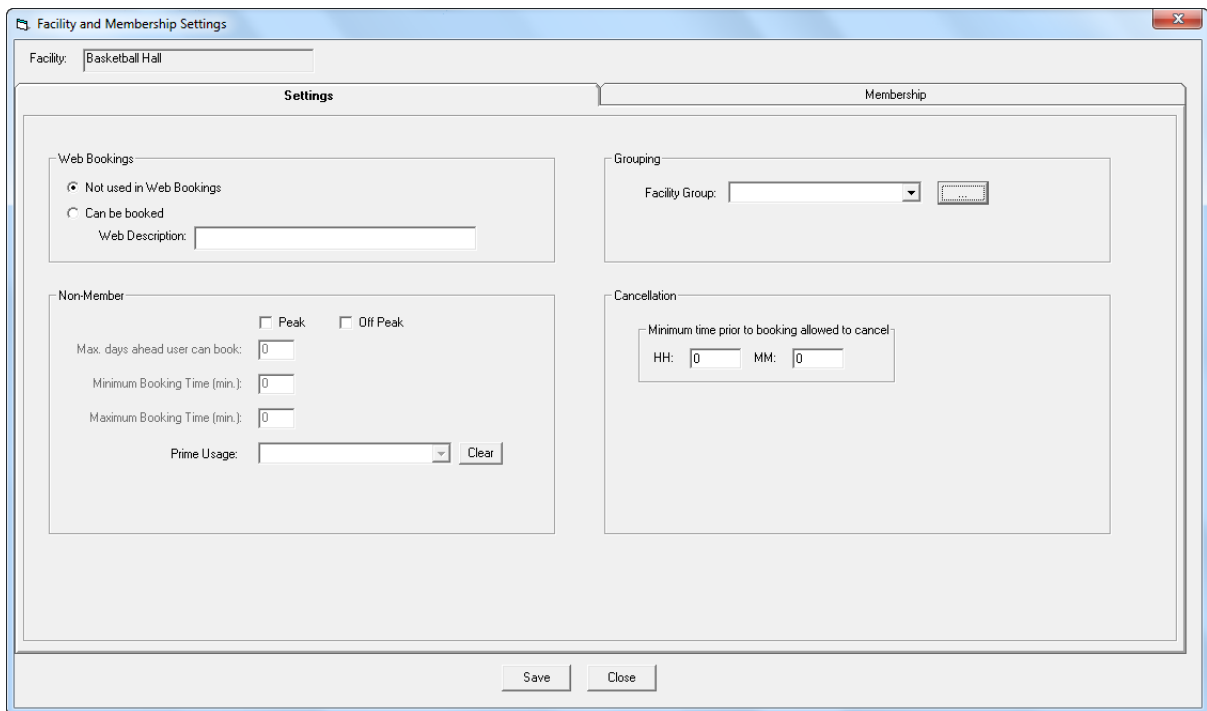
Member and Casual Pricing are the same

If your current member and casual pricing are going to be the same, you need to complete the following settings. For example, lane hire and court hire are the same price for everyone for casual hire of the space. The only price difference is for clients which this does not affect.

Members and Non Members/Casuals will have the same parameters set up and therefore the rules will be the same for both.

Settings

Go to Admin> Facility> Setup Facilities> Settings

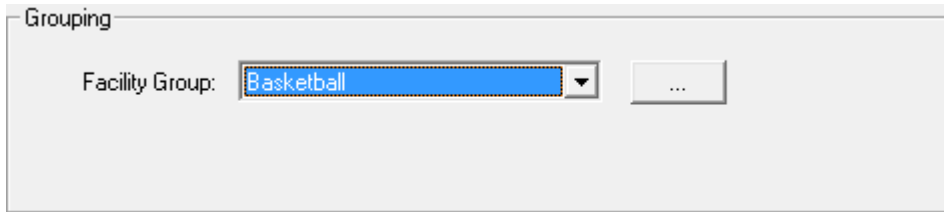


Web Bookings

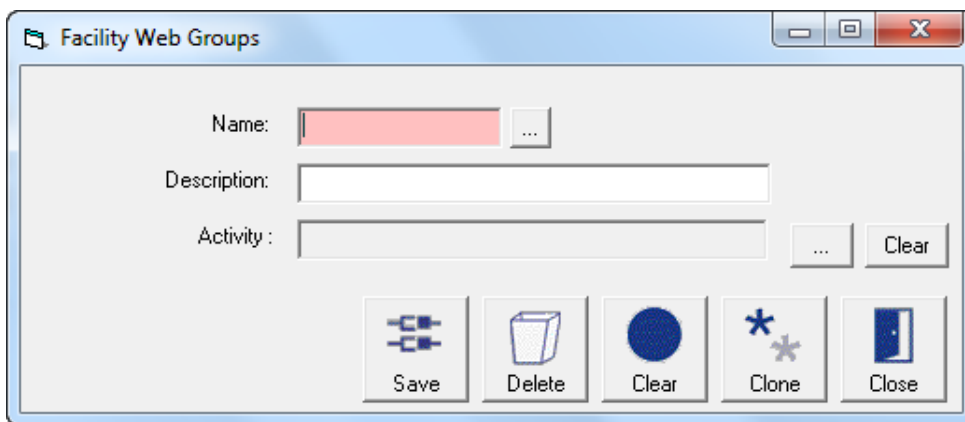


Enter a web description that will appear when making a booking through Active Carrot.

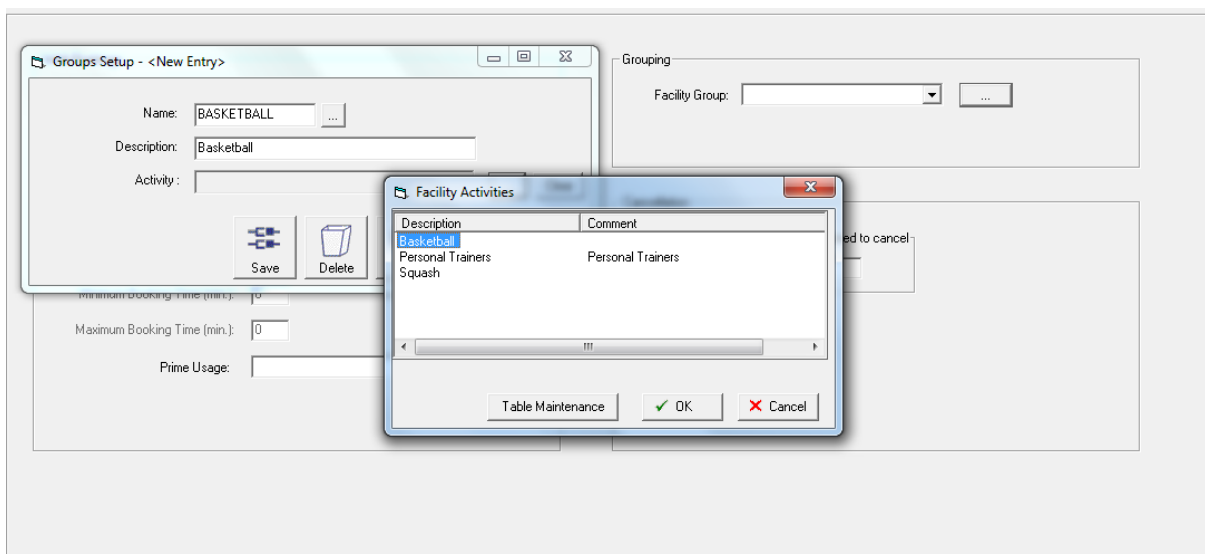
Grouping



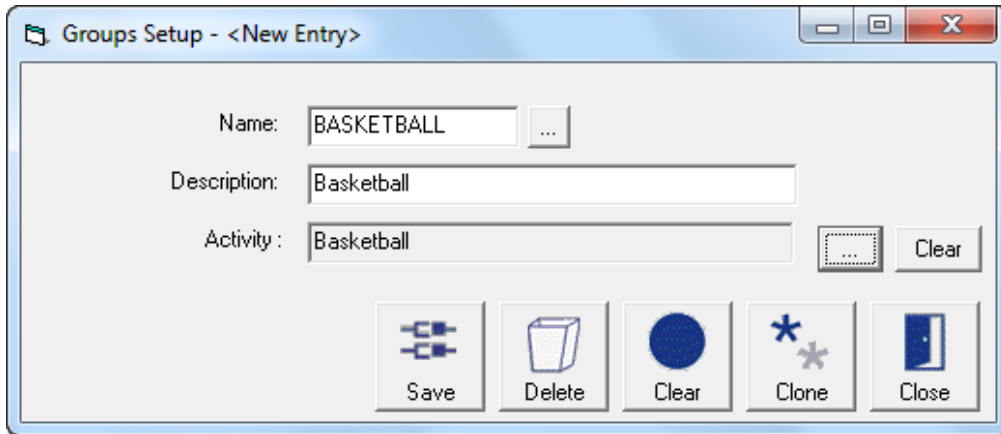
You will need to select a Facility Group. This is used to complete the structure for Activity Use Limits and must be completed. If you have already setup Facility Groups, you can use the drop down to select the applicable group. Otherwise, select the three dots and complete the following.



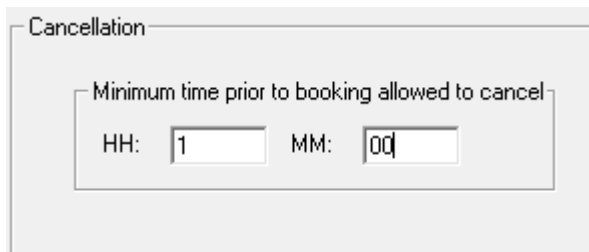
1. Enter a name
2. Enter a description
3. Select an activity. If you have not already set up Facility Activities you will need to complete this through Table Maintenance. For more information on Table Maintenance, please refer to the Admin User Guide.



Description	Comment
Basketball	Personal Trainers
Personal Trainers	
Squash	

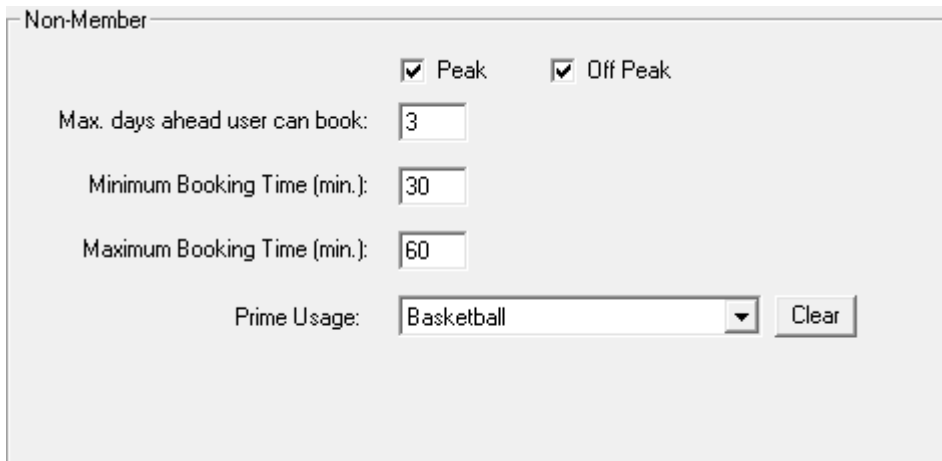


Cancellation



Enter the minimum time prior to the booking starting that a Customer can cancel a Facility booking through Active Carrot.

Non Member



Enter the parameters for Non Member/Casual bookings. In this example:

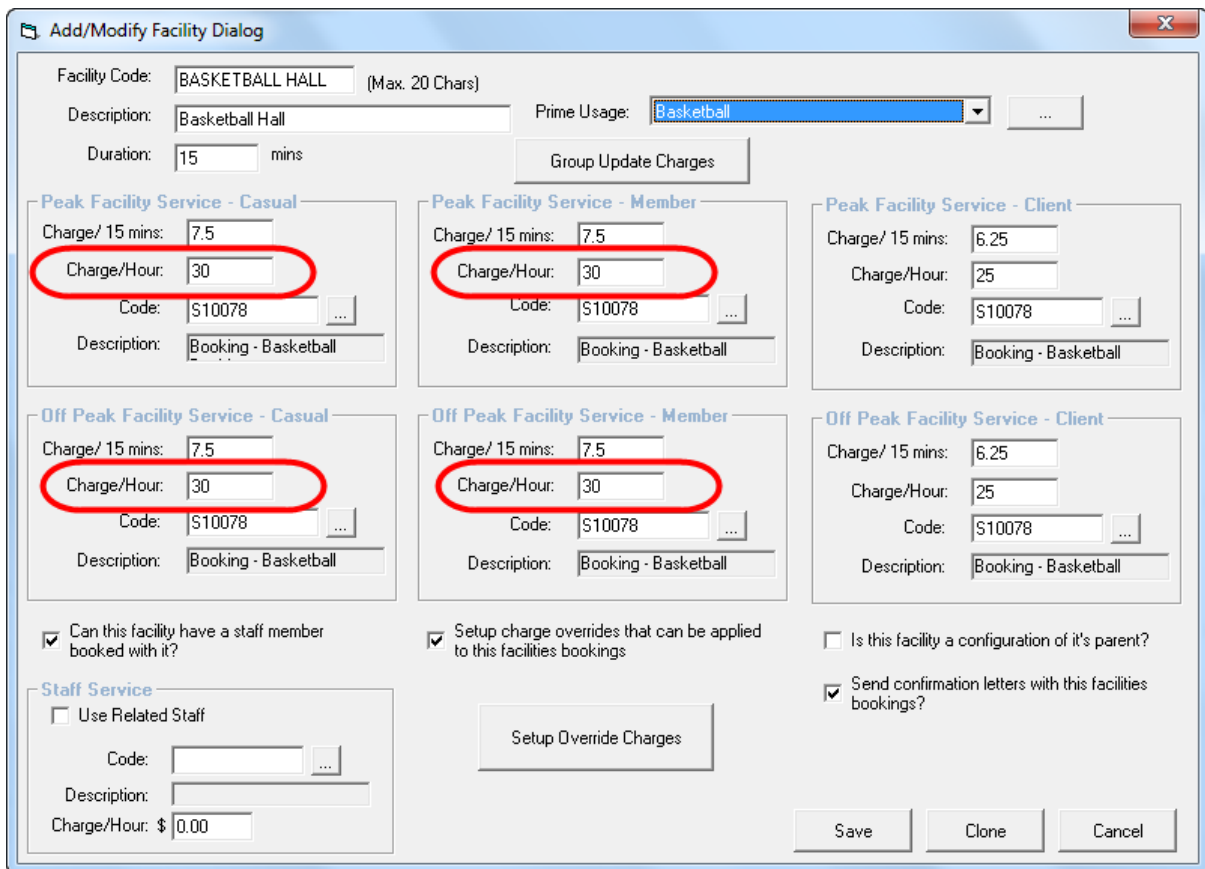
- They can book during Peak and Off Peak times
- They can book 3 days ahead
- They can book for a minimum of 30 minutes in any one booking
- They can book for a maximum of 60 minutes in any one booking
- The prime usage for these bookings is Basketball

Membership

Admin > Facility > Setup Facilities > Settings

In this situation you would need to select all the Memberships you sell and set the parameters to the same as the Non Members settings as no Memberships get different pricing or parameters.

As you can see in the Facility Setup, the Member price and Casual pricing is the same, therefore we need to add all Memberships to the Membership Settings to say that they get the same parameters as Non Members/Casuals.



Add/Modify Facility Dialog

Facility Code: BASKETBALL HALL (Max. 20 Chars)
 Description: Basketball Hall
 Duration: 15 mins
 Prime Usage: Basketball

Group Update Charges

Peak Facility Service - Casual
 Charge/ 15 mins: 7.5
 Charge/Hour: 30
 Code: S10078
 Description: Booking - Basketball

Peak Facility Service - Member
 Charge/ 15 mins: 7.5
 Charge/Hour: 30
 Code: S10078
 Description: Booking - Basketball

Peak Facility Service - Client
 Charge/ 15 mins: 6.25
 Charge/Hour: 25
 Code: S10078
 Description: Booking - Basketball

Off Peak Facility Service - Casual
 Charge/ 15 mins: 7.5
 Charge/Hour: 30
 Code: S10078
 Description: Booking - Basketball

Off Peak Facility Service - Member
 Charge/ 15 mins: 7.5
 Charge/Hour: 30
 Code: S10078
 Description: Booking - Basketball

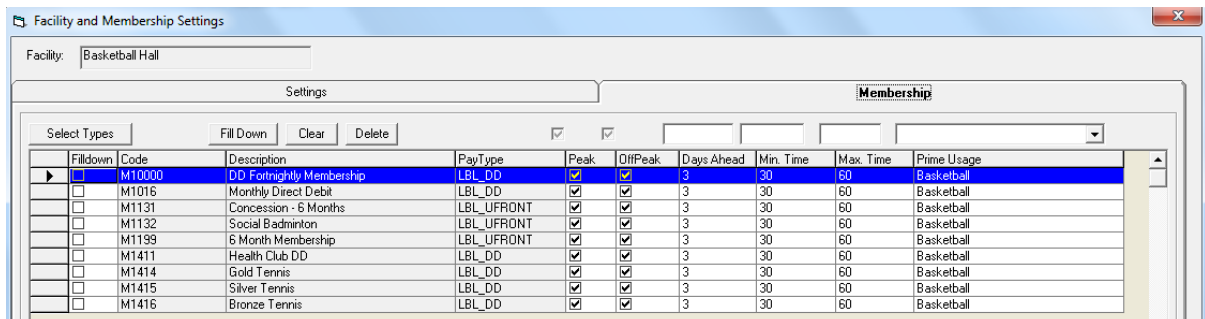
Off Peak Facility Service - Client
 Charge/ 15 mins: 6.25
 Charge/Hour: 25
 Code: S10078
 Description: Booking - Basketball

Can this facility have a staff member booked with it?
 Setup charge overrides that can be applied to this facilities bookings
 Is this facility a configuration of it's parent?
 Send confirmation letters with this facilities bookings?

Staff Service
 Use Related Staff
 Code:
 Description:
 Charge/Hour: \$ 0.00

Setup Override Charges

Save Clone Cancel



Facility and Membership Settings

Facility: Basketball Hall

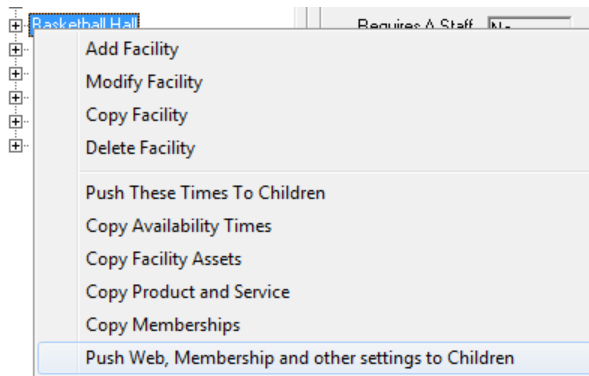
Settings Membership

Select Types	Fill Down	Clear	Delete							
Filldown	Code	Description	PayType	Peak	DiffPeak	Days Ahead	Min. Time	Max. Time	Prime Usage	
<input checked="" type="checkbox"/>	M10000	DD Fortnightly Membership	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1016	Monthly Direct Debit	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1131	Concession - 6 Months	LBL_UFRONT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1132	Social Badminton	LBL_UFRONT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1199	6 Month Membership	LBL_UFRONT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1411	Health Club DD	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1414	Gold Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1415	Silver Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	
<input type="checkbox"/>	M1416	Bronze Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Basketball	

Push Settings to Children

Admin > Facility > Setup Facilities

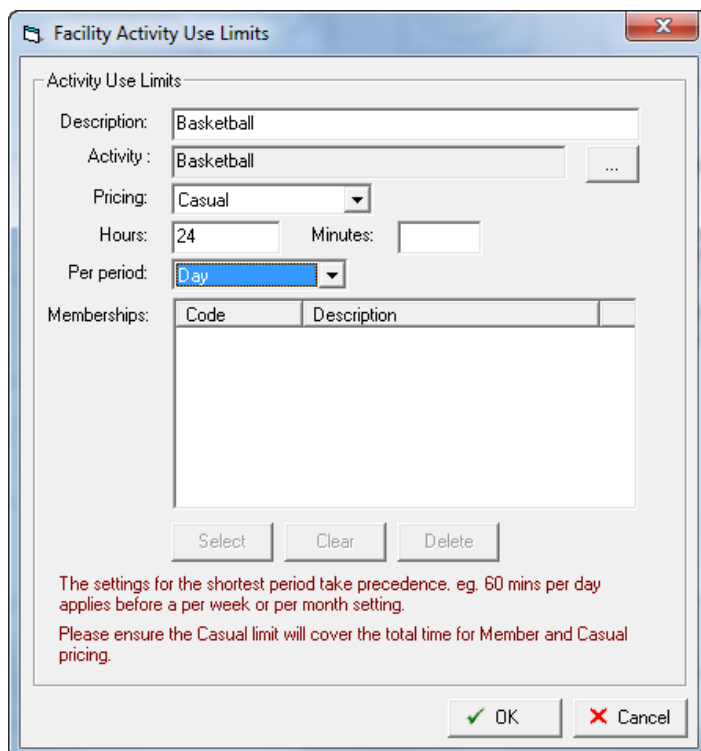
Once you have completed the Parent Facility, you can push the settings to the Children.



Facility Settings – Activity Use Limits

Admin > Facility > Facility Settings

These parameters control the total time a customer can book a particular Activity for within the defined period and receive the Member rate or same for Casuals. In this scenario that Non Members/Casuals can make as many bookings as they like in a day, you need to select the following:



Which will display like this when Basketball is selected from the drop down menu

Facility Settings

Facility Settings **Activity Use Limits**

Facility Activity Use Limits
 These parameters control the total time a customer can book a particular Activity for within the defined period and receive the member rate, or the same for casuals. The shorter duration takes precedence.

Filter by Activity:

Description	Pricing	Max Time	Period
Basketball	Casual	24 hrs	Day

Add Edit Delete

OK Cancel

Scenario Two

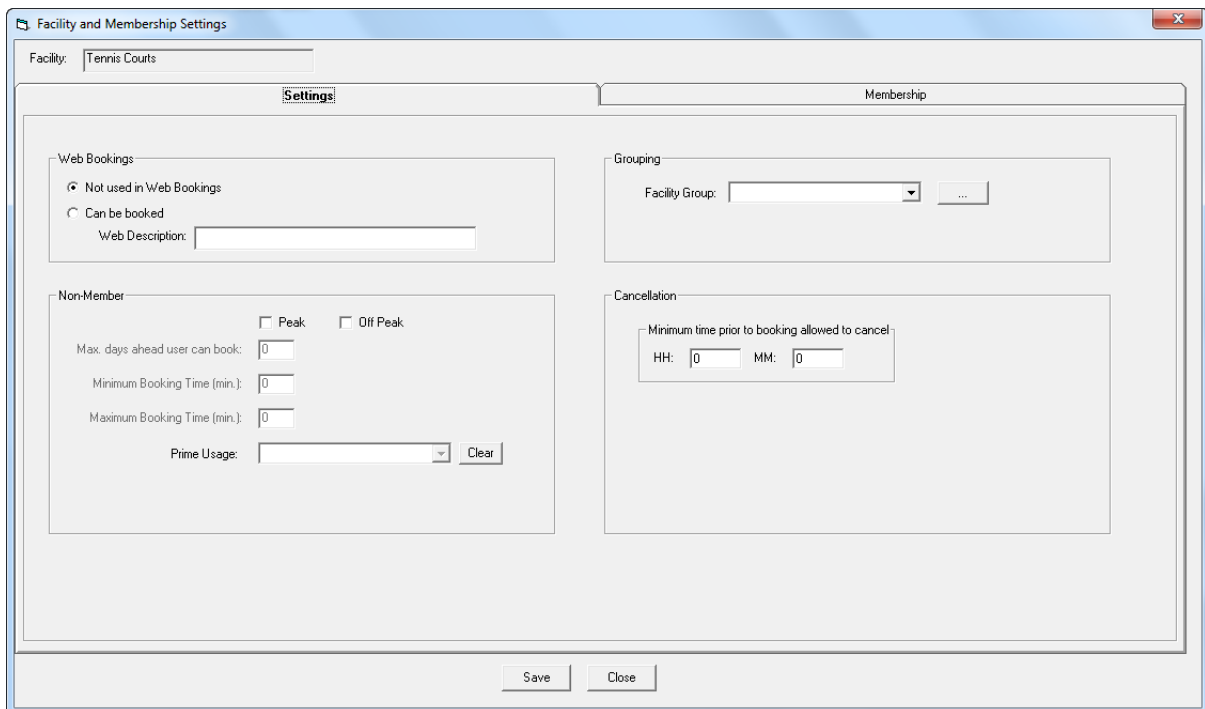
Different Membership Types receive different booking Parameters and Rules

If you have different layers of memberships that receive different pricing and parameters, you need to complete the following settings. For example, you have 3 different Tennis Memberships that entitle them to different parameters and use depending on their Membership Type. For example:

- Gold Tennis Membership
- Silver Tennis Membership
- Bronze Tennis Membership

Settings

Admin > Facility > Setup Facilities > Settings

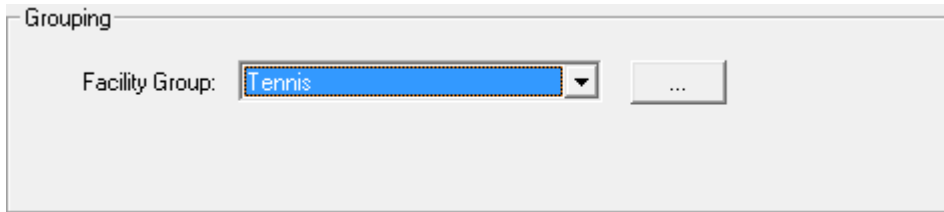


Web Bookings

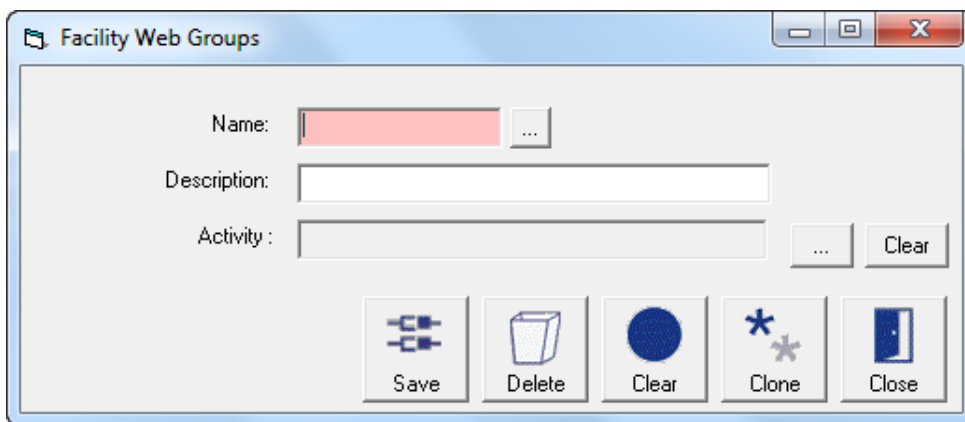


Enter a web description that will appear when making a booking through Active Carrot.

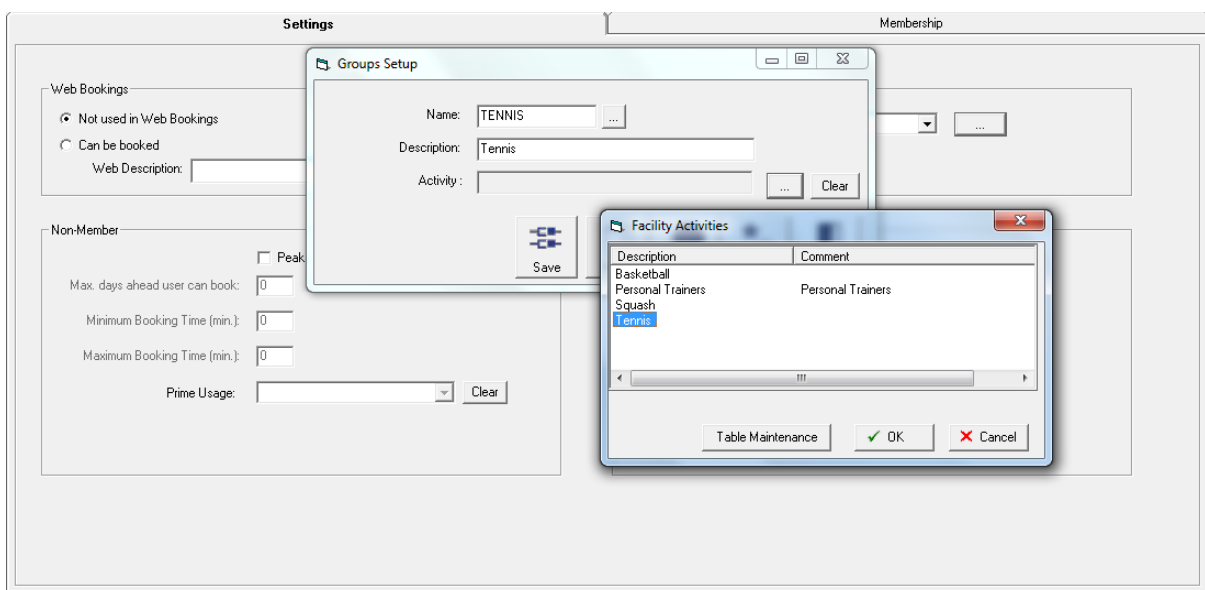
Grouping



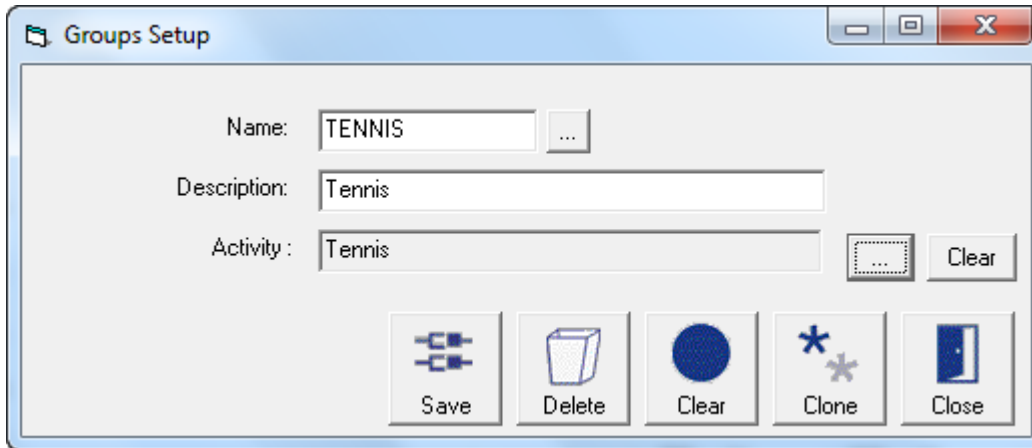
You will need to select a Facility Group. This is used to complete the structure for Activity Use Limits and must be completed. If you have already setup Facility Groups, you can use the drop down to select the applicable group. Otherwise, select the 3 dots and complete the following.



4. Enter a Name
5. Enter a description
6. Select an Activity. If you have not already set up Facility Activities you will need to complete this through Table Maintenance. For more information on Table Maintenance, please refer to the Admin User Guide.



Description	Comment
Basketball	
Personal Trainers	Personal Trainers
Squash	
Tennis	



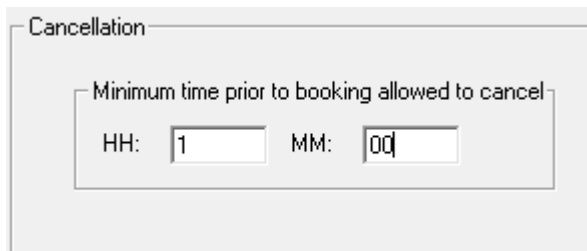
Groups Setup

Name: ...

Description:

Activity: ...

Cancellation



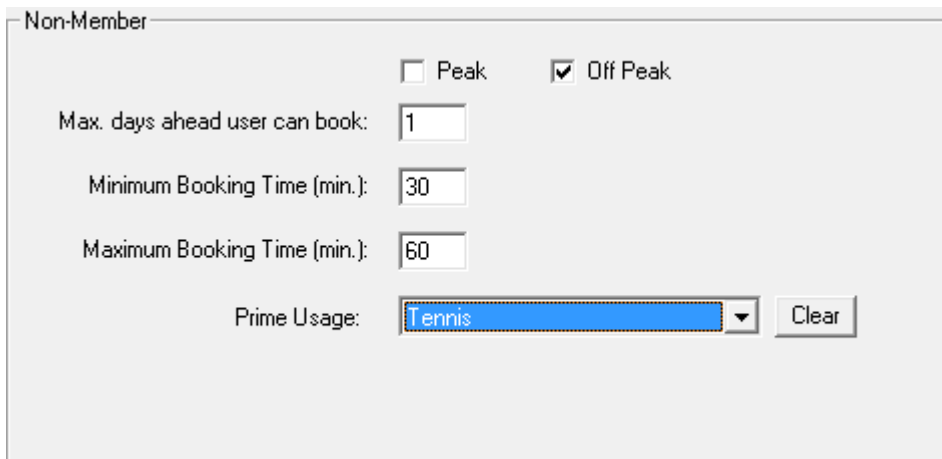
Cancellation

Minimum time prior to booking allowed to cancel

HH: MM:

Enter the minimum time prior to the booking starting that a Customer can cancel a Facility booking through Active Carrot.

Non Member



Non-Member

Peak Off Peak

Max. days ahead user can book:

Minimum Booking Time (min.):

Maximum Booking Time (min.):

Prime Usage:

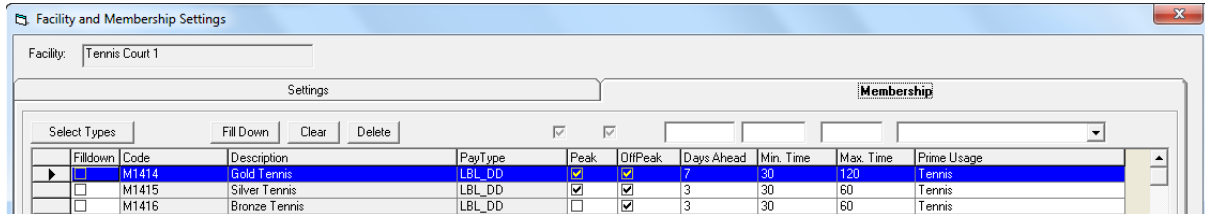
Enter the parameters for Non Member/Casual bookings. In this example:

- They can book during Off Peak times only
- They can book 1 day ahead
- They can book for a minimum of 30 minutes in any one booking
- They can book for a maximum of 60 minutes in any one booking
- The prime usage for these bookings is Tennis

Membership

Admin > Facility > Setup Facilities > Settings

In this scenario as you are giving different parameters to different Membership Types, you must complete this section for each different scenario.



Filldown	Code	Description	PayType	Peak	OffPeak	Days Ahead	Min. Time	Max. Time	Prime Usage
<input checked="" type="checkbox"/>	M1414	Gold Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	30	120	Tennis
<input type="checkbox"/>	M1415	Silver Tennis	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Tennis
<input type="checkbox"/>	M1416	Bronze Tennis	LBL_DD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	30	60	Tennis

In the above example, the following applies when a booking is made by a Member that holds the one of the above Membership Types:

Gold Tennis Membership

- Get Member pricing during Peak and Off Peak times
- Can book seven days in advance
- Can book for at minimum of half an hour and a maximum of two hours

Silver Tennis Membership

- Get Member pricing during Peak and Off Peak times
- Can book three days in advance
- Can book for at minimum of half an hour and a maximum of one hour

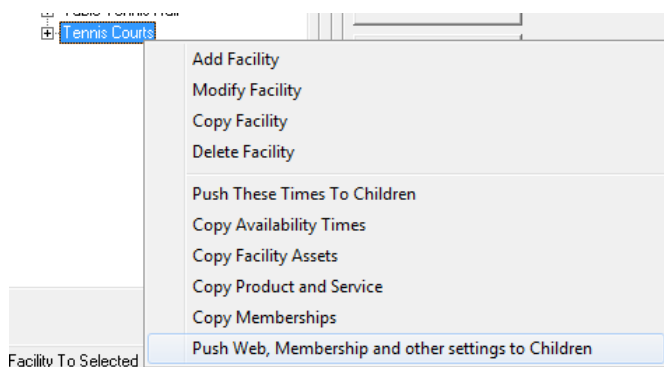
Bronze Tennis Membership

- Get Member pricing only during Off Peak times
- Can book three days in advance
- Can book for at minimum of half an hour and a maximum of one hour

All other Membership Types are considered a Non Member/Casual and will be charged Non Member/Casual Pricing and reflect the parameters of a Non Member/Casual booking.

Push Settings to Children

Once you have completed the Parent Facility, you can push the settings to the children.



Facility Settings – Activity Use Limits

Admin > Facility > Facility Setup

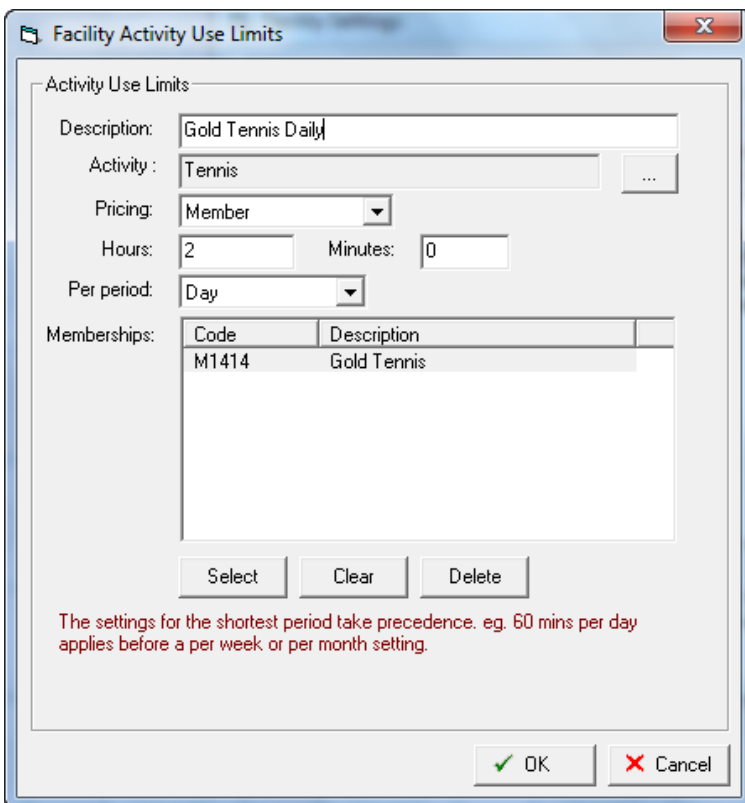
These parameters control the total time a customer can book a particular Activity for within the defined period and receive the member rate or same for casuals.

For example:

Gold Tennis Membership

Is allowed 2 hours of bookings per day at Member pricing and they have a limit of 10 hours a week at Member pricing, therefore you would complete the following:

1. Enter in 2 hours per day at Member pricing



Facility Activity Use Limits

Activity Use Limits

Description: Gold Tennis Daily

Activity: Tennis

Pricing: Member

Hours: 2 Minutes: 0

Per period: Day

Code	Description
M1414	Gold Tennis

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.

OK Cancel

2. Then you need to specify that they can have a maximum 10 hours a week at Member Pricing

Facility Activity Use Limits

Activity Use Limits

Description: Gold Tennis Weekly

Activity: Tennis

Pricing: Member

Hours: 10 Minutes:

Per period: Week

Code	Description
M1414	Gold Tennis

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.

OK Cancel

3. This would show you the following under the Activity Use Limits

Facility Settings

Facility Settings **Activity Use Limits**

Facility Activity Use Limits

These parameters control the total time a customer can book a particular Activity for within the defined period and receive the member rate, or the same for casuals. The shorter duration takes precedence.

Filter by Activity: Tennis

Description	Pricing	Max Time	Period
Gold Tennis Daily	Member	2 hrs	Day
Gold Tennis Weekly	Member	10 hrs	Week

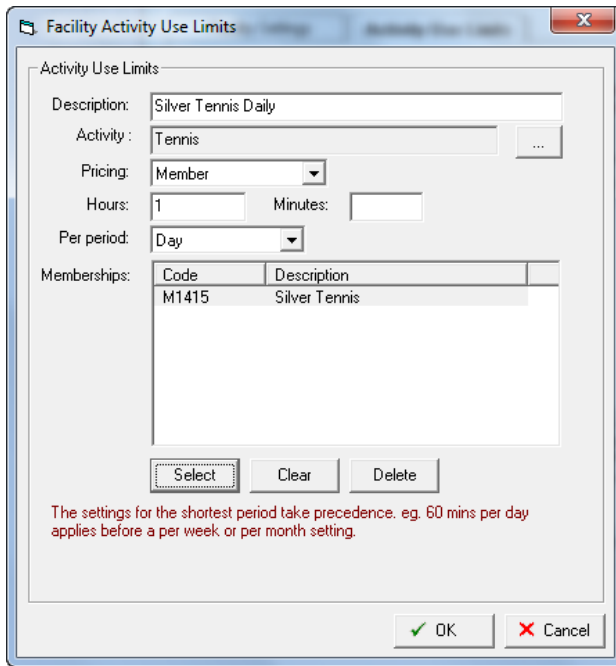
Add Edit Delete

OK Cancel

Silver Tennis Membership

Is allowed a one hour booking per day at Member pricing and they have a limit of 15 hours a month at Member pricing, therefore you would complete the following:

1. Enter in one hour per day at Member pricing



Facility Activity Use Limits

Activity Use Limits

Description: Silver Tennis Daily

Activity: Tennis

Pricing: Member

Hours: 1 Minutes:

Per period: Day

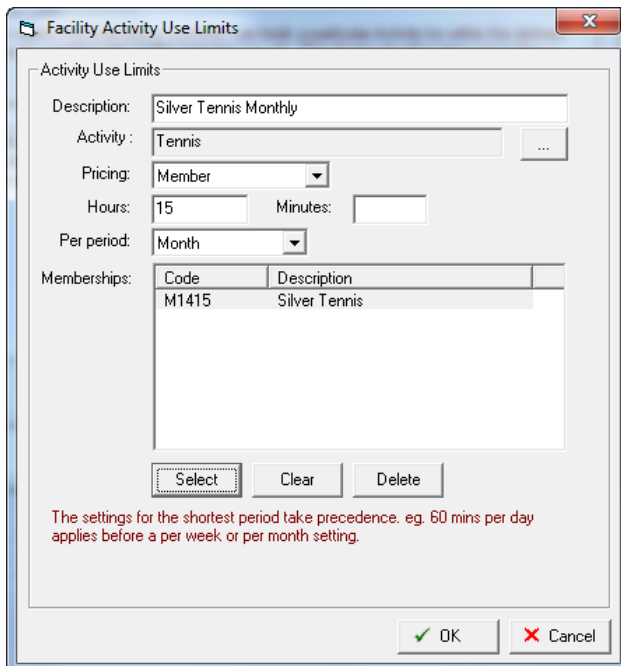
Code	Description
M1415	Silver Tennis

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.

OK Cancel

2. Then you need to specify that they can have a maximum 15 hours a month at Member pricing



Facility Activity Use Limits

Activity Use Limits

Description: Silver Tennis Monthly

Activity: Tennis

Pricing: Member

Hours: 15 Minutes:

Per period: Month

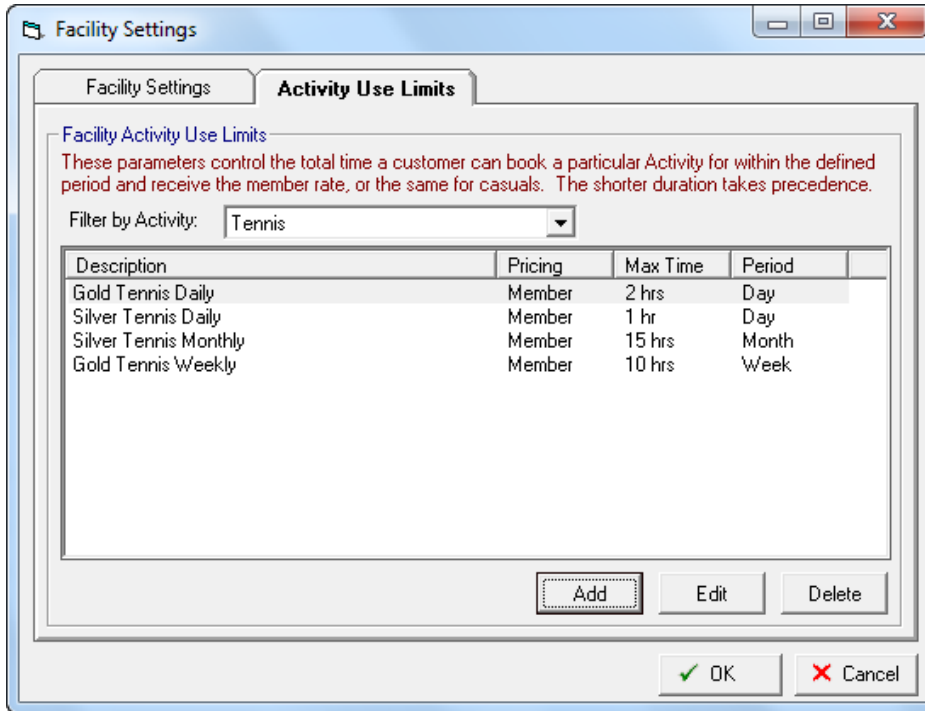
Code	Description
M1415	Silver Tennis

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.

OK Cancel

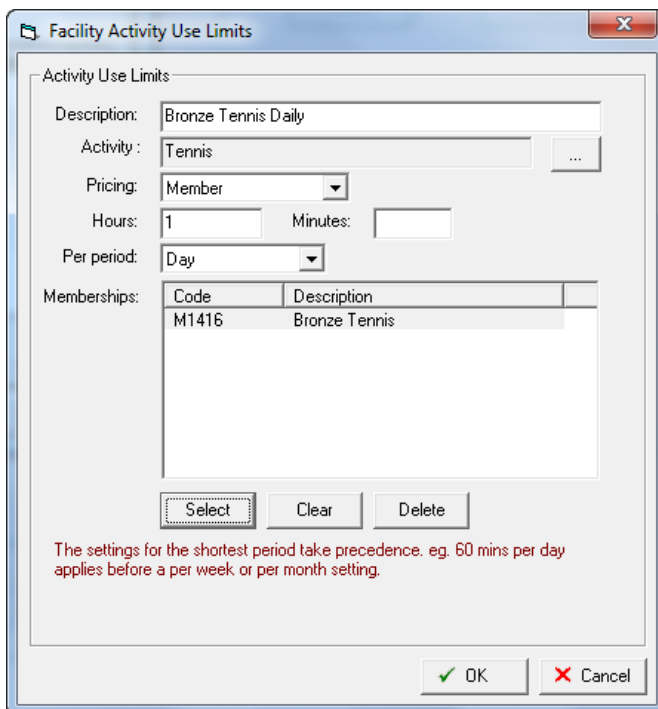
3. This would show you the following under the Facility Activity Use Limits



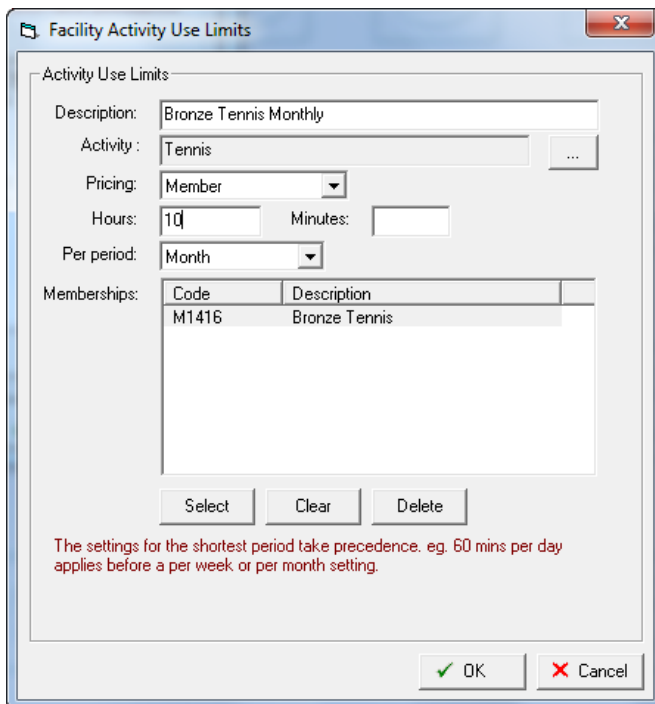
Bronze Tennis Membership

Is allowed a one hour booking per day at Member Pricing and they have a limit of 10 hours a month at Member pricing, therefore you would complete the following:

1. Enter in one hour per day at Member pricing



- Then you need to specify that they can have a maximum 10 hours a month at Member pricing



Facility Activity Use Limits

Activity Use Limits

Description: Bronze Tennis Monthly

Activity: Tennis

Pricing: Member

Hours: 10 Minutes:

Per period: Month

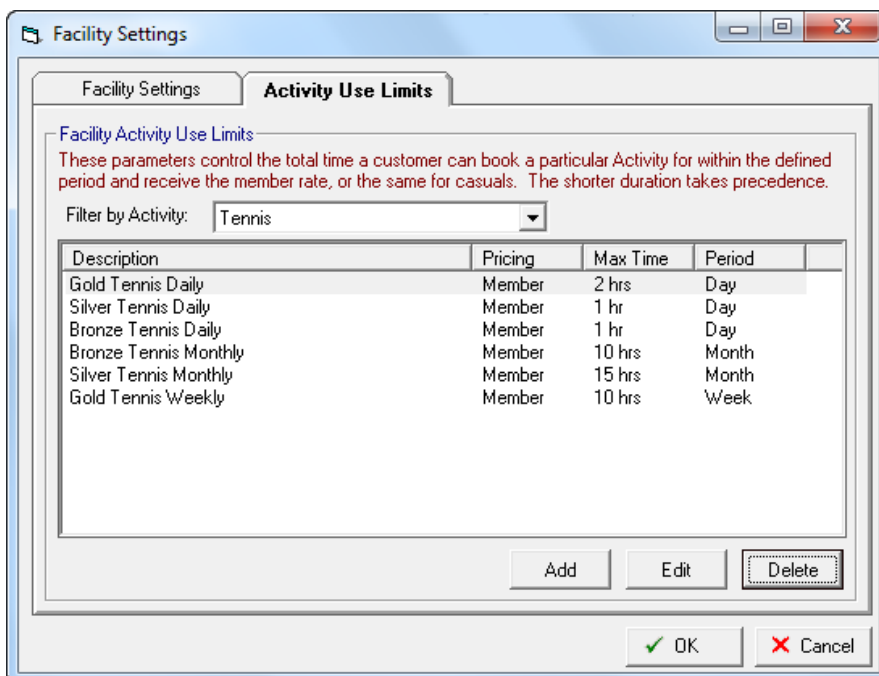
Code	Description
M1416	Bronze Tennis

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.

OK Cancel

- This would show you the following under the Facility Activity Use Limits



Facility Settings

Facility Settings Activity Use Limits

Facility Activity Use Limits

These parameters control the total time a customer can book a particular Activity for within the defined period and receive the member rate, or the same for casuals. The shorter duration takes precedence.

Filter by Activity: Tennis

Description	Pricing	Max Time	Period
Gold Tennis Daily	Member	2 hrs	Day
Silver Tennis Daily	Member	1 hr	Day
Bronze Tennis Daily	Member	1 hr	Day
Bronze Tennis Monthly	Member	10 hrs	Month
Silver Tennis Monthly	Member	15 hrs	Month
Gold Tennis Weekly	Member	10 hrs	Week

Add Edit Delete

OK Cancel

Now that you have completed the Activity Use Limits for Gold, Silver and Bronze Memberships, you need to enter the Non Member/Casual limits.

Non Member/Casuals can make as many bookings as they like a day, therefore you would need to enter the following

Facility Activity Use Limits

Activity Use Limits

Description: Non Member Tennis

Activity: Tennis

Pricing: Casual

Hours: 24 Minutes:

Per period: Day

Memberships:

Code	Description

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.
Please ensure the Casual limit will cover the total time for Member and Casual pricing.

OK Cancel

Which will display like this when Tennis is selected from the drop down menu

Facility Settings

Facility Settings **Activity Use Limits**

Facility Activity Use Limits

These parameters control the total time a customer can book a particular Activity for within the defined period and receive the member rate, or the same for casuals. The shorter duration takes precedence.

Filter by Activity: Tennis

Description	Pricing	Max Time	Period
Non Member Tennis	Casual	24 hrs	Day
Bronze Tennis Daily	Member	1 hr	Day
Gold Tennis Daily	Member	2 hrs	Day
Silver Tennis Daily	Member	1 hr	Day
Silver Tennis Monthly	Member	15 hrs	Month
Bronze Tennis Monthly	Member	10 hrs	Month
Gold Tennis Weekly	Member	10 hrs	Week

Add Edit Delete

OK Cancel

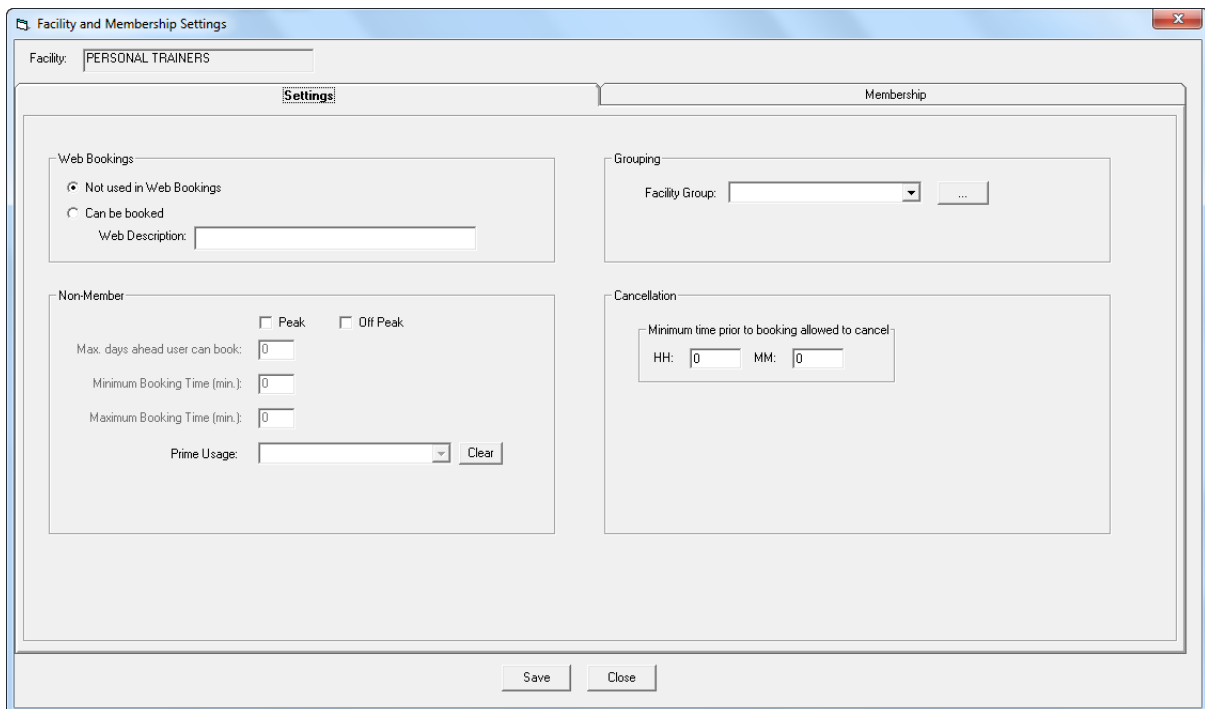
Scenario Three

A Facility can be booked with a Staff Member

If you have a membership that allows a staff member to be booked with it, you need to complete the following settings. An example of this is you have a Personal Training membership that gives the Member one free Personal Training session a week. The Member pricing when setting up the Facility would be \$0.

Settings

Admin > Facility > Setup Facilities > Settings

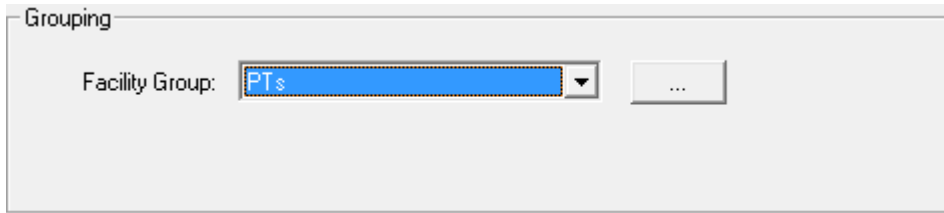


Web Bookings



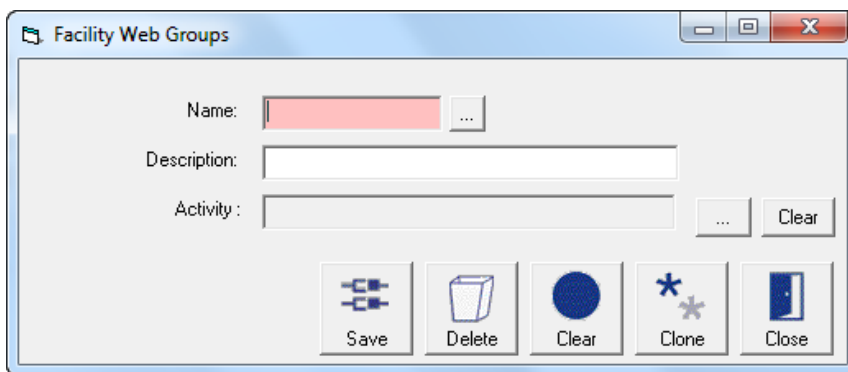
Enter a web description that will appear when making a booking through Active Carrot.

Grouping



The screenshot shows a dialog box titled "Grouping". It contains a label "Facility Group:" followed by a dropdown menu with "PTs" selected and a button with three dots to its right.

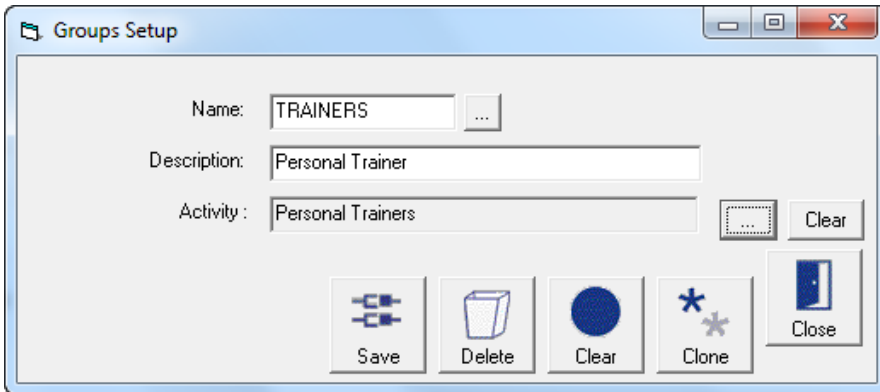
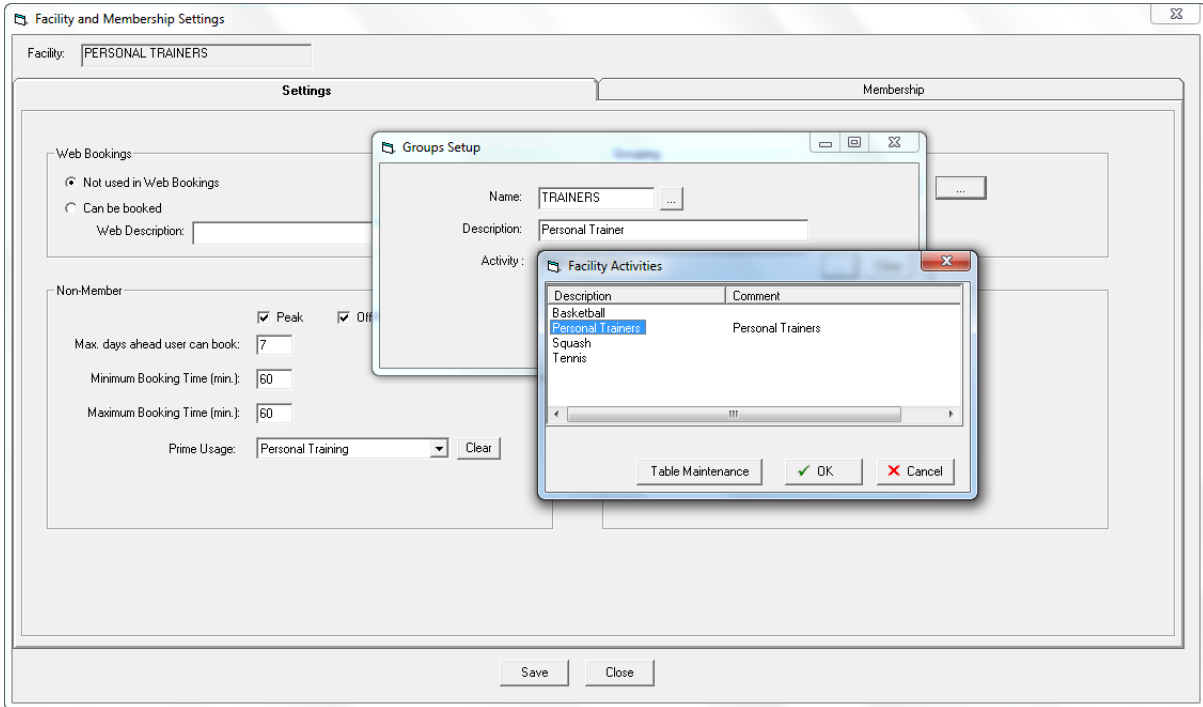
You will need to select a Facility Group. This is used to complete the structure for Activity Use Limits and must be completed. If you have already setup Facility Groups, you can use the drop down to select the applicable group. Otherwise, select the 3 dots and complete the following.



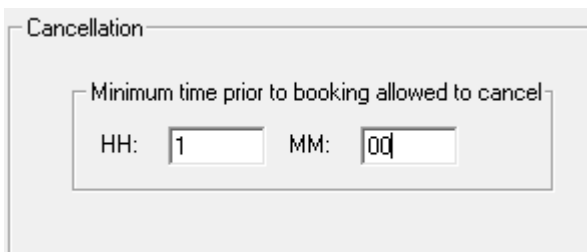
The screenshot shows a dialog box titled "Facility Web Groups". It contains the following fields and buttons:

- Name: [Redacted] ...
- Description: [Empty text box]
- Activity: [Empty text box] ... Clear
- Buttons: Save, Delete, Clear, Clone, Close

7. Enter a Name
8. Enter a description
9. Select an Activity. If you have not already set up Facility Activities you will need to complete this through Table Maintenance. For more information on Table Maintenance, please refer to the Admin User Guide.



Cancellation



Enter the minimum time prior to the booking starting that a Customer can cancel a Facility booking.

Non Member

Non-Member

Peak Off Peak

Max. days ahead user can book:

Minimum Booking Time (min.):

Maximum Booking Time (min.):

Prime Usage:

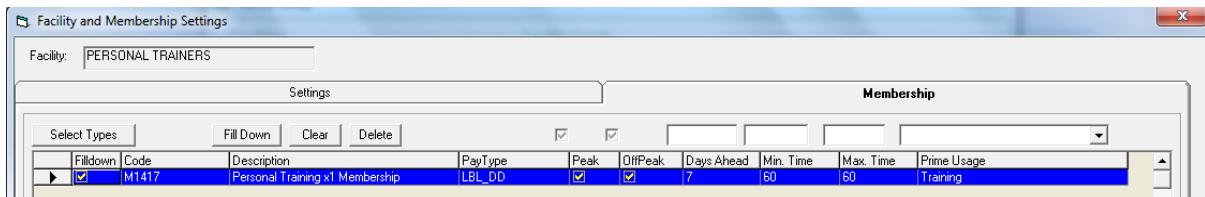
Enter the parameters for Non Member/Casual bookings:

- They can book during Peak and Off Peak times
- They can book 7 days ahead
- They can book for a minimum of 60 minutes in any one booking
- They can book for a maximum of 60 minutes in any one booking
- The prime usage for these bookings is Personal Training

Membership

Admin > Facility > Setup Facilities > Settings

In this scenario as you are giving different parameters to different Membership Types, you must complete this section for each different scenario.



Facility	Settings								
Facility	Membership								
Facility	Code	Description	Pay Type	Peak	Off Peak	Days Ahead	Min. Time	Max. Time	Prime Usage
PERSONAL TRAINERS	M1417	Personal Training x1 Membership	LBL_DD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	60	60	Training

In the above example, the Personal Training x1 membership has the same booking parameters as a Non Member/Casual booking.

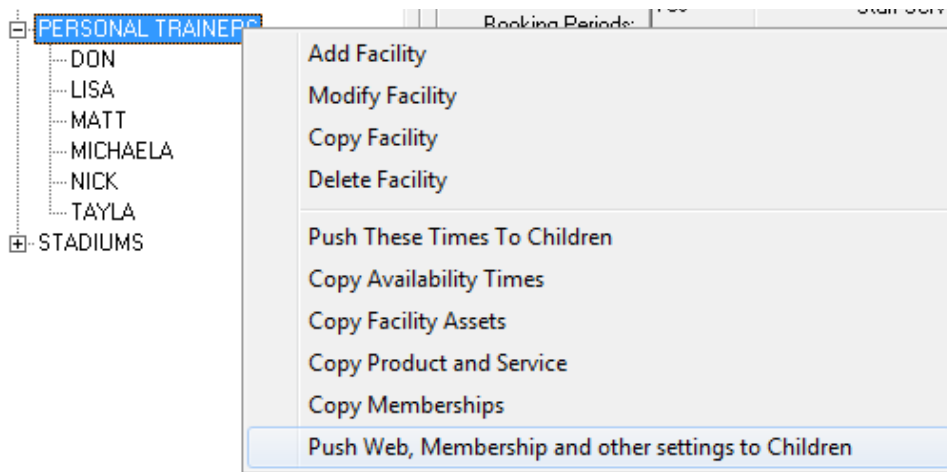
Personal Training x1 Membership

- Get Member pricing during Peak and Off Peak times
- Can book 7 days in advance
- Can book for one hour at a time

All other Membership Types are considered Non Members/Casual and will be charged Casual Pricing and reflect the parameters of a Non Member/Casual booking.

Push Settings to Children

Once you have completed the Parent Facility, you can push the settings to the children.



Facility Settings - Activity Use Limits

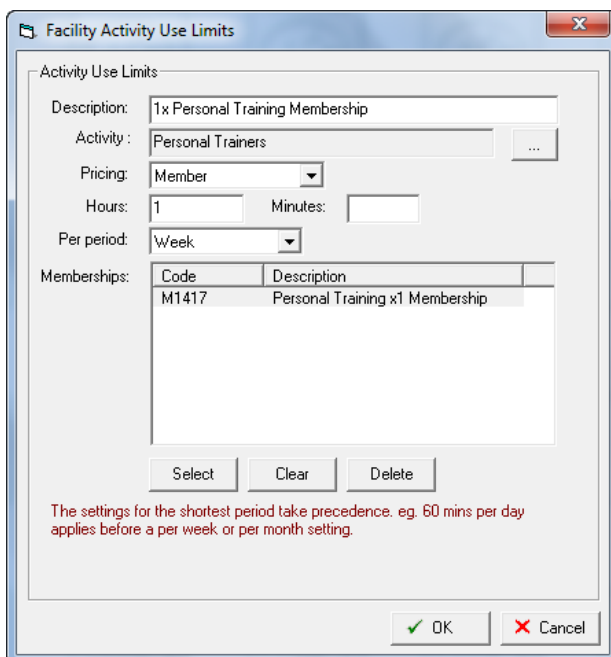
Admin > Facility > Facility Setup

These parameters control the total time a Customer can book a particular Activity for within the defined period and receive the Member rate or same for Casuals. For example:

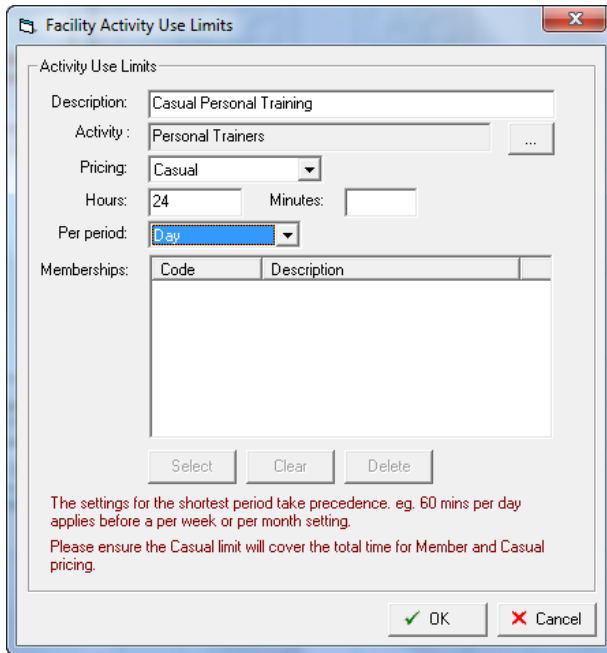
Personal Training x1 Membership

Is allowed an hour booking a week at Member pricing which is \$0 in this case as they get one free Personal Training session a week, therefore you would complete the following:

4. Enter in one hour per day at Member pricing



- After this is entered, you need to enter the Non Member/Casual rules. A Non Member/Casual can make as many bookings as they like, however they will be charged at Non Member/Casual Pricing



Facility Activity Use Limits

Activity Use Limits

Description: Casual Personal Training

Activity: Personal Trainers

Pricing: Casual

Hours: 24 Minutes:

Per period: Day

Memberships:

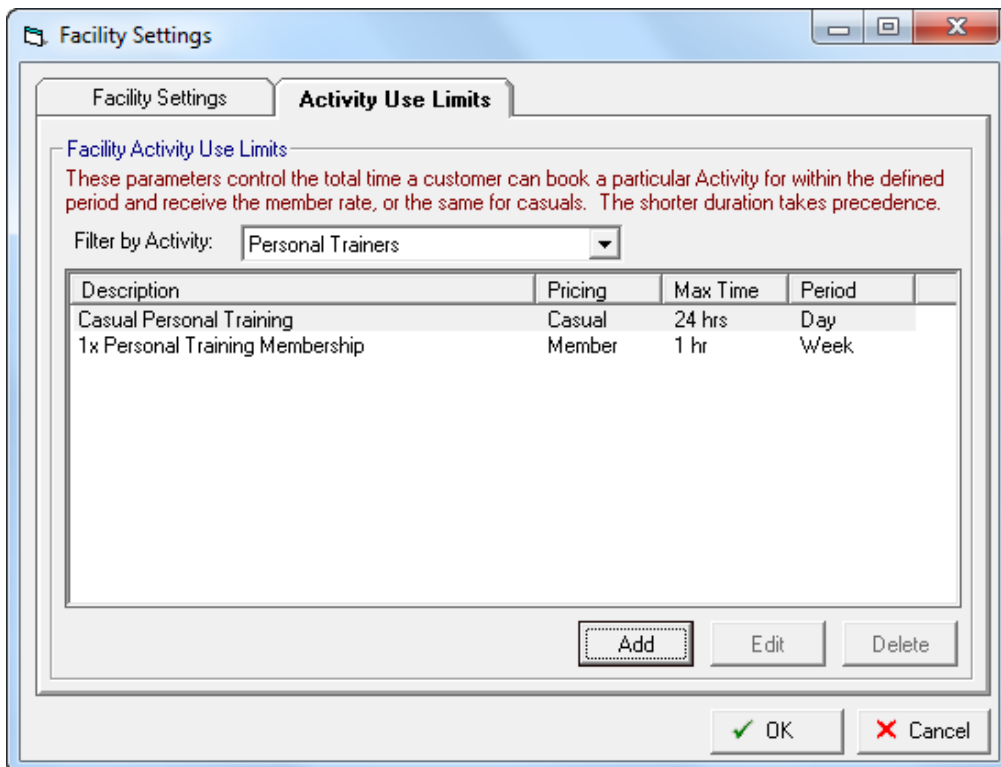
Code	Description
------	-------------

Select Clear Delete

The settings for the shortest period take precedence. eg. 60 mins per day applies before a per week or per month setting.
Please ensure the Casual limit will cover the total time for Member and Casual pricing.

OK Cancel

- This would show you the following under the Activity Use Limits



Facility Settings

Facility Settings Activity Use Limits

Facility Activity Use Limits

These parameters control the total time a customer can book a particular Activity for within the defined period and receive the member rate, or the same for casuals. The shorter duration takes precedence.

Filter by Activity: Personal Trainers

Description	Pricing	Max Time	Period
Casual Personal Training	Casual	24 hrs	Day
1x Personal Training Membership	Member	1 hr	Week

Add Edit Delete

OK Cancel

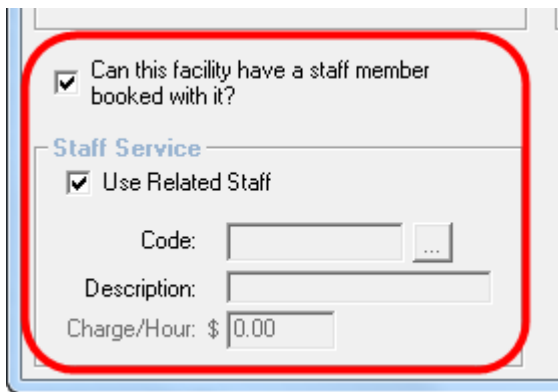
Assigning Staff to a Facility

If you are using Scenario three, you will have to add a Staff Member to a Facility so they are booked as well as the Facility.

Ensure that you have selected for the Facility to be able to be booked with a Staff Member first of all.

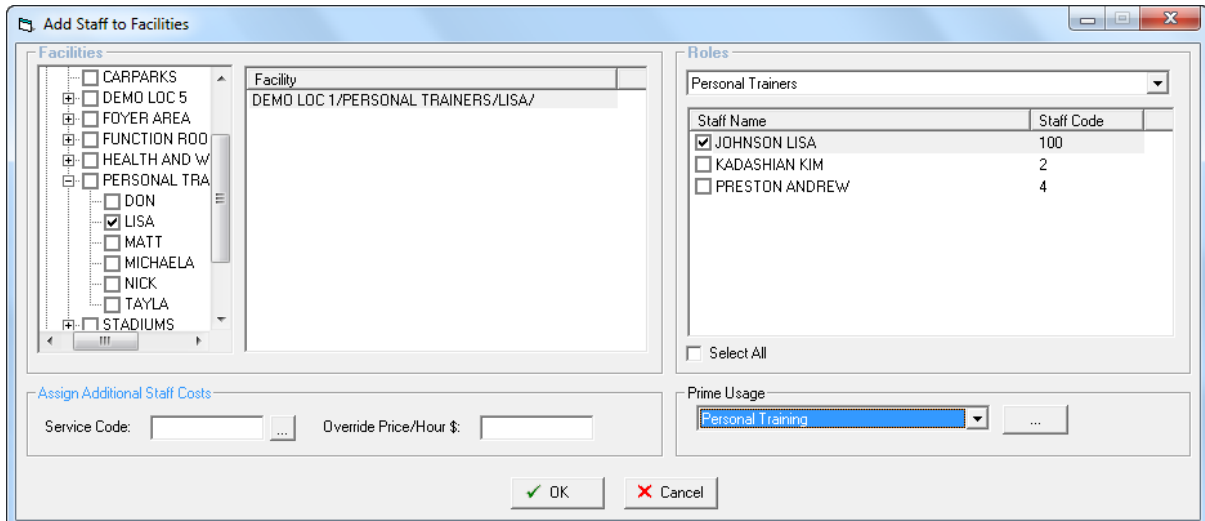
Admin > Facility > Setup Facilities > Modify Facility

Ensure you tick both 'Can this Facility have a staff member booked with it?' and 'Use Related Staff'.



Admin > Facility > Add Staff to Facilities

In the below example, I have added Lisa Johnson staff member to the Facility 'LISA' so when a booking is made Lisa Johnson is also booked out and can't be double booked.



Staff Name	Staff Code
<input checked="" type="checkbox"/> JOHNSON LISA	100
<input type="checkbox"/> KADASHIAN KIM	2
<input type="checkbox"/> PRESTON ANDREW	4

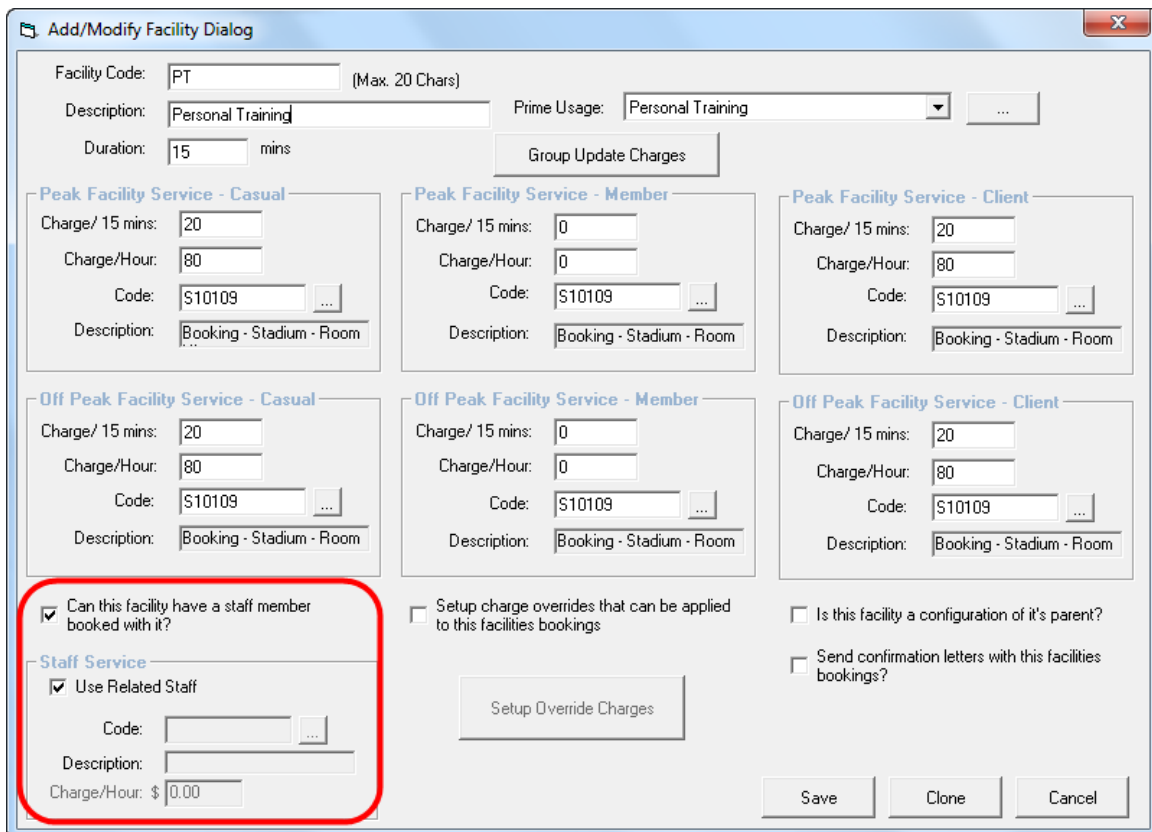
Ability to Book with Staff Member (Personal Trainer/Coach)

A Facility can be aligned with one Staff Member or multiple Staff Members which can be attached alongside a Facility at the time of booking.

First, you must say in the Facility set up screen that a Staff Member can be booked with the Facility.

Admin> Facility> Facility> Setup Facilities> Modify Facility

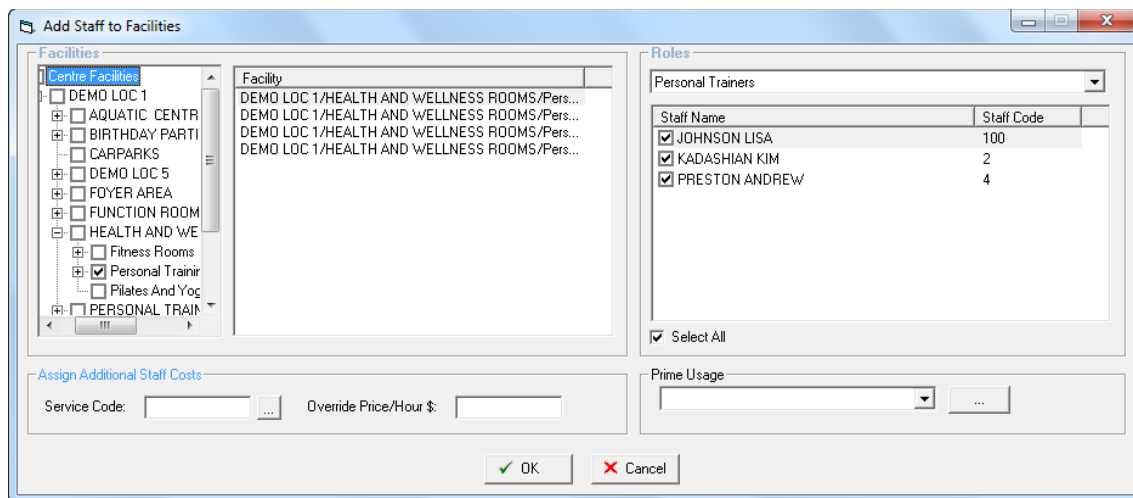
Ensure you tick both 'Can this Facility have a staff member booked with it?' and 'Use Related Staff'.



The screenshot shows the 'Add/Modify Facility Dialog' window. At the top, there are fields for 'Facility Code' (PT), 'Description' (Personal Training), 'Duration' (15 mins), and 'Prime Usage' (Personal Training). Below these are three columns for 'Peak Facility Service' (Casual, Member, Client) and three columns for 'Off Peak Facility Service' (Casual, Member, Client). Each service column contains fields for 'Charge/15 mins', 'Charge/Hour', 'Code', and 'Description'. At the bottom left, a red box highlights two checkboxes: 'Can this facility have a staff member booked with it?' (checked) and 'Use Related Staff' (checked). Other checkboxes include 'Setup charge overrides that can be applied to this facilities bookings', 'Is this facility a configuration of it's parent?', and 'Send confirmation letters with this facilities bookings?'. There are also 'Save', 'Clone', and 'Cancel' buttons at the bottom right.

The Staff Members are then assigned to a Facility through the 'Add Staff to Facilities' screen

Go to Admin> Facility> Add Staff to Facility



Staff can be assigned in three different ways

1. A single Staff Member is attached to a single Facility
 - E.g. Personal Trainer
2. Multiple Staff Members are attached to a single Facility
 - E.g. Fitness Assessment Room
3. Multiple Staff Members are attached to multiple Facilities
 - E.g. Tennis Coaching across multiple courts

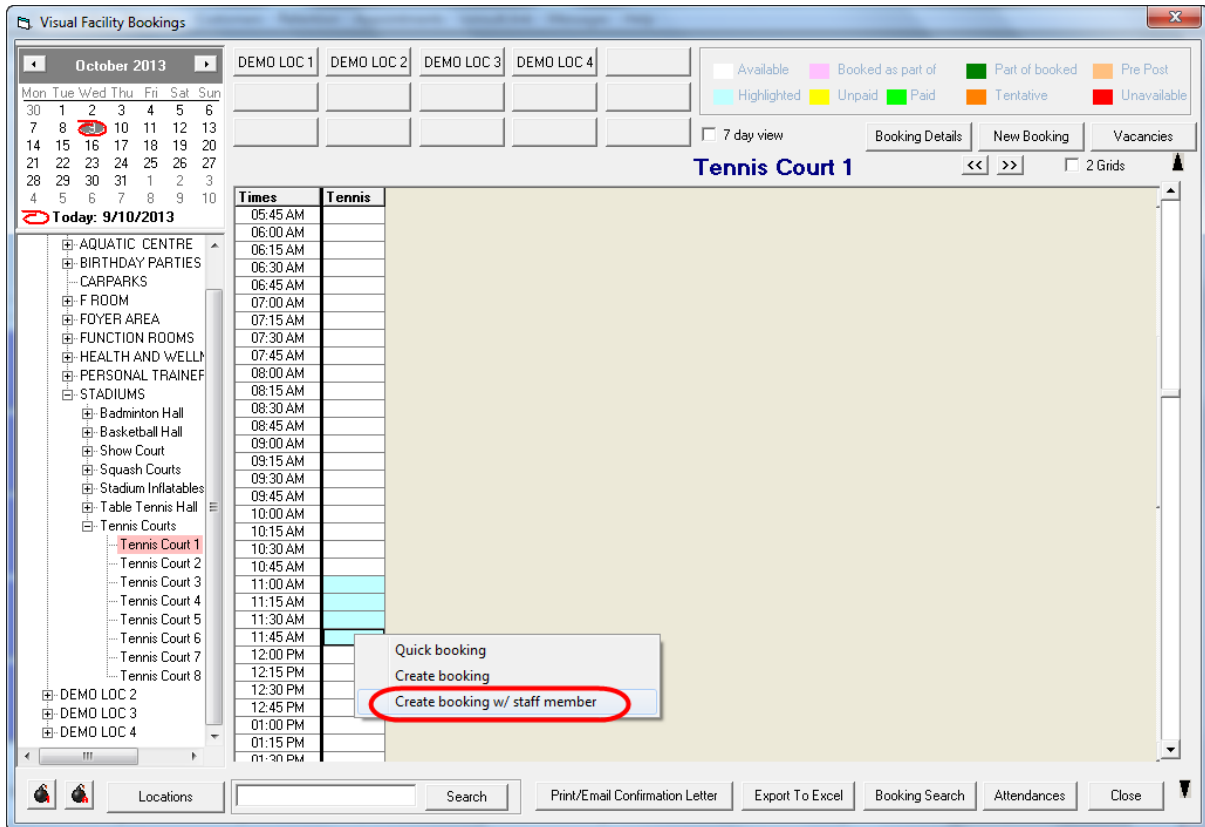
Additional charges and Prime Usage for each staff member can be assigned to each Facility when a Staff Member is booked.

An example of this is when a Tennis Court is booked without a Coach it is \$40 an hour. However, when it is booked with a Coach, it is \$190 an hour.

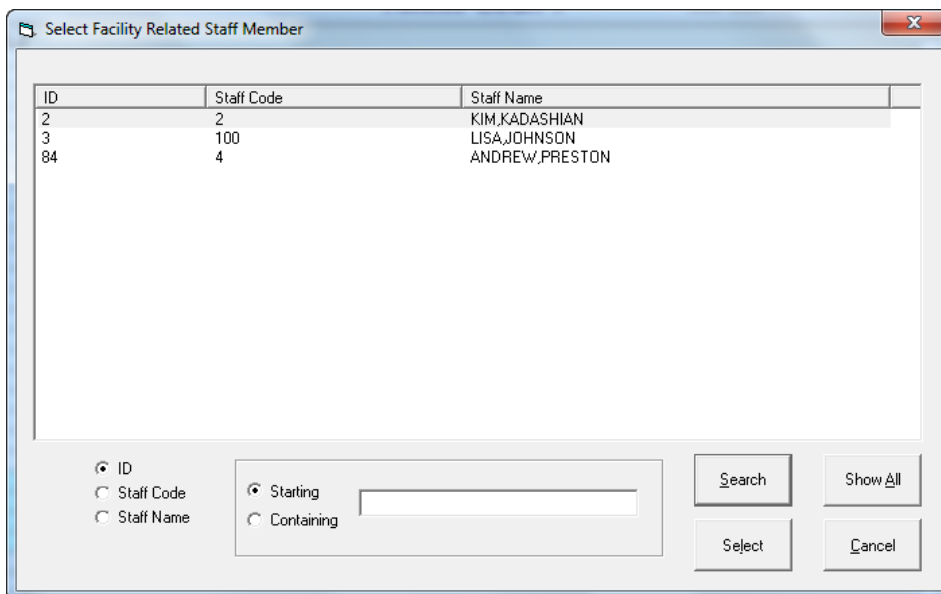
When selecting Staff Members to add to a Facility, you need to ensure that they are in a Staff Role. For further information on Staff Roles, please refer to the Admin User Guide.

Note: Availability of the Facility is when you can make a booking, not when a Staff Member is available.

When making a booking, you need to select 'Create Booking with a Staff Member'



If multiple Staff Members are attached, you will be required to select the appropriate Staff Member from the list.



The staff member is booked as circled below along with any extra charges and appropriate Prime Usage.

Facility Booking

Date Booked: **Wed 9/10/2013** Booking ID Ref #

Booking Details

Casual Use
 Customer
 Client

Booking Name:

Customer Id:

Name:

Method: Invoice Account Cash On Arrival

Instructions:

Prime Usage: **Tennis Coaching**

Multiple Bookings

End Date:
 Period:
 Booking Type:

Peak Period
Off Peak Period
Pre/Post

Facility Name	Date	Day	From Time	To Time	Attended	Duration (mins)	No. Periods	\$ Per Period	Charge (\$)	Service
Tennis Court 1	9/10/2013	We	11:00 AM	12:00 PM	<input type="checkbox"/>	60	4	10.00	40.00	Tennis

Total owing on this booking line is \$190.00

Pre: Post:

Adjustments

Date	Amt

Other Booking Charge Details

Service Name	Qty	Hours	\$ Per Hour	Charge (\$)
Tennis Courts	1.00	1.00	150.00	150.00

* - Price was overridden Selected Booking Total \$: 190.00

Credit Assets Staff

Staff Members Name:

JOHNSON, LISA

Tran ID | Payment Date | Amount, \$

Group Booking Total: \$ 190.00
Total Paid: \$ 0.00
Outstanding: \$ 190.00

Classes in Links

Classes and Class Mobile

Links has two specific products designed to assist your Customers to make bookings online. If you only want to allow your Customers to preview classes that are available Class Mobile provides a tool where Customers can make enquiries about availability.

Alternatively, Active Carrot Classes gives your Customers the ability to make Class bookings online.

Classes Settings

Admin> Site> Other Site Parameters/Set up Locations>ClassWeb tab

Some of the existing ClassWeb settings found in Links have been extended to now apply to Active Carrot Classes and Class Mobile. Highlighted in the image below are the existing ClassWeb settings which are now applicable to Classes and Class Mobile within Active Carrot.

General Options tab

- **Till** – it is no longer required to specify a till within this screen for bookings made online via Active Carrot. Any transactions relating to Classes payments made online can be found against the Web Applications Till as specified within the Tills tab.
- **Days ahead to search** – here you can define how many days in advance Customers can search for Class availability using Active Carrot.
- **Show Teachers** - If this is not selected the teachers assigned to each class will not be displayed on the web

- **Show Vacancies** - You can select whether you wish the number of spots available in a class to display or not
- **Show Average Age** - You can select whether you wish the average age of students in classes to display or not
- **Show Class id** - Primarily used for testing, however you can display the class id online if you wish
- **Include Next Period** – select this option if you wish for Customers to be charged a pro rata & the next direct debit period amount upfront at the time of booking. **PLEASE NOTE THIS IS NOT AVAILABLE IN THE FIRST RELEASE OF ACTIVE CARROT CLASSES.**
- **First Emerg Contact Mandatory** – select this option if you want to restrict Customers from making bookings without providing a primary emergency contact for the Students.
- **Display Second Emerg Contact** – select this option if you wish to display a second entry field for capturing a secondary emergency contact. Having this option selected, does not make the entry of a second emergency contact mandatory during the booking process.
- **Bookings closed** - Depending on how you allow customers to book for classes online, you can control when a class is closed for bookings. For example, you may want to close off bookings within say 2 hours so that if it is 3pm on the day customers can't book for a 4pm class to start today, they would start next week for that class.
- **New Registration** – this gives the user the ability to stop 'New Registrations' until a set date. This mean, at re-enrolment time your current Customers can have first choice of classes before new Families can book into a class. If you do not want new Families to enrol online we suggest setting this date well into the future; i.e. 01/01/2099.

Class Filtering Options

- **Only Show levels student holds level history for** –When enabled, Active Carrot will only show classes that the student holds a level history for. Level history is obtained when the student is booking into a class. Should a family with multiple students be making a booking the available levels for all students will be shown
- **Default Class Type** -In addition to the above, Active Carrot can also show classes from a specific class type. In the case where a student/s do not hold any level history, only classes from the Default Class type will show. Where a student has level history, all classes that met the level history requirement will be shown plus all classes in the Default class type. This has been designed so as that new customers can register and book into a class type for Assessments. Once the assessment class has been attended the site can book the student into the applicable level. Following this booking the user will be able to make future bookings based on their level history.

The Terms & Conditions and Description tabs do not need to be completed. You will set this up in the Manager Portal.

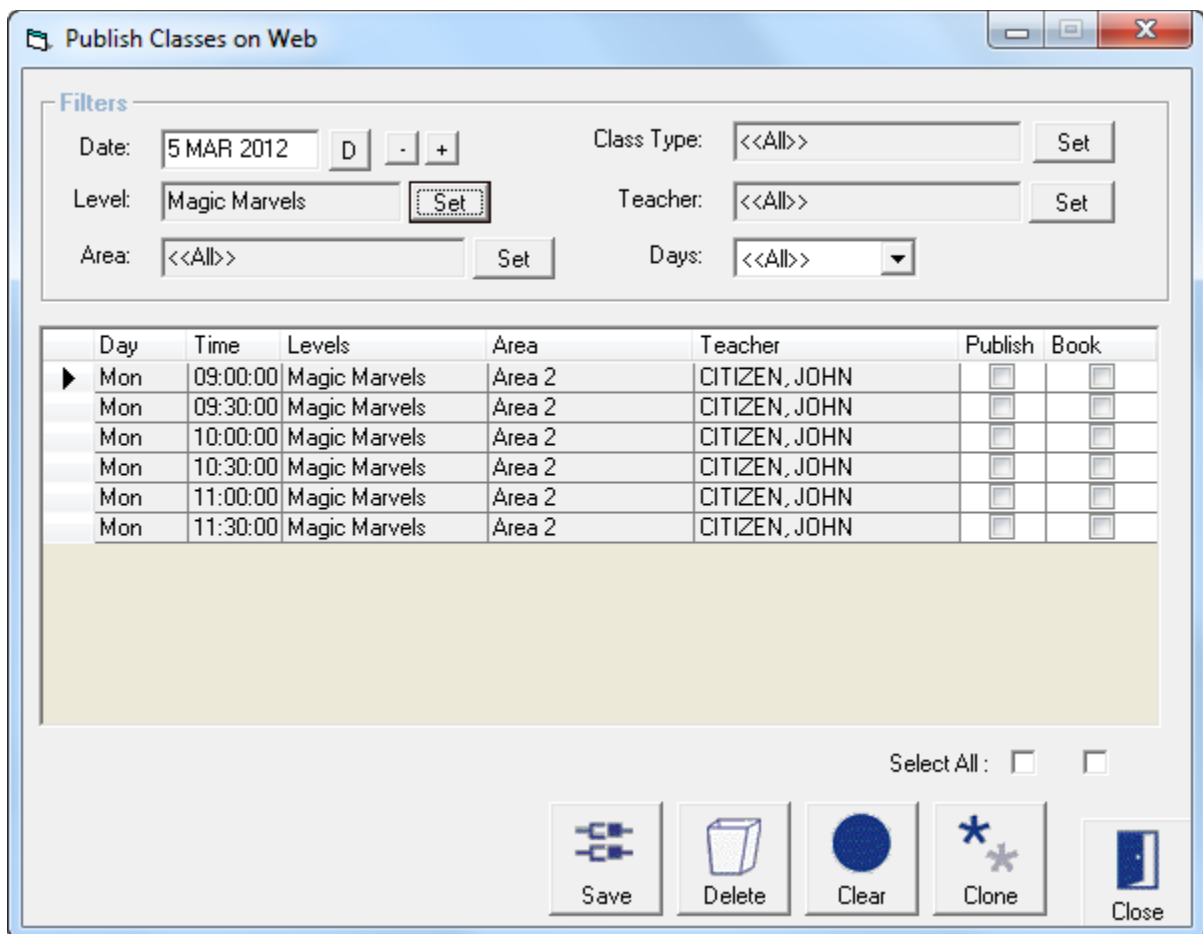
Publishing your Classes

Admin > Classes > Publish Web Classes

This process allows you to select which classes which will be available to view online and which classes will be available to be booked online. You can choose to only allow classes to be viewed online if you want.

Once you have your web settings completed, you will now need to decide which classes are going to be available for viewing and booking online. There are three options for Classes:

- Not available at all online
- Available only to view online
- Available to view and book online



Filters

Date: 5 MAR 2012 [D] [-] [+] Class Type: <<All>> [Set]

Level: Magic Marvels [Set] Teacher: <<All>> [Set]

Area: <<All>> [Set] Days: <<All>> [v]

Day	Time	Levels	Area	Teacher	Publish	Book
▶ Mon	09:00:00	Magic Marvels	Area 2	CITIZEN, JOHN	<input type="checkbox"/>	<input type="checkbox"/>
Mon	09:30:00	Magic Marvels	Area 2	CITIZEN, JOHN	<input type="checkbox"/>	<input type="checkbox"/>
Mon	10:00:00	Magic Marvels	Area 2	CITIZEN, JOHN	<input type="checkbox"/>	<input type="checkbox"/>
Mon	10:30:00	Magic Marvels	Area 2	CITIZEN, JOHN	<input type="checkbox"/>	<input type="checkbox"/>
Mon	11:00:00	Magic Marvels	Area 2	CITIZEN, JOHN	<input type="checkbox"/>	<input type="checkbox"/>
Mon	11:30:00	Magic Marvels	Area 2	CITIZEN, JOHN	<input type="checkbox"/>	<input type="checkbox"/>

Select All:

Save Delete Clear Clone Close

You can choose to filter the classes displayed using the standard filter options at the top of the screen. Once you have filtered the classes to your required selection then you can choose to 'Select All' if appropriate.

- **Publish** – the class will be available to view online including current vacancies if you wish, but Customers will not be able to book into this class.
- **Book** – this option must be selected if you wish for Customers to be able to book into this class online.

Online Charges

Term Bookings

Terms fees are charged online in the same fashion that they are in the Classes Module.

Perpetual Bookings

When a Customer books online into a class that is a part of a perpetual Class Type, Active Carrot will charge the pro rata for the remaining part of the debit period in the same fashion that a booking in the Classes Module would.

If you wish to include the next period also then you must select this option in the ClassWeb setup screen (Other Site Parameters or Setup Locations). This would be the same amount charged if you had selected the 'include next period' option in the 'Create Student Booking' screen.

Joining fee: \$	<input type="text" value="10.00"/>	Fee each DD: \$	<input type="text" value="27.90"/>
+ Pro rata: \$	<input type="text" value="55.80"/>	<input type="text" value="?"/>	<input checked="" type="checkbox"/> Include next period
- Discount: \$	<input type="text" value="5.58"/>	Next Period 01 Jun 2005	

Joining Fees

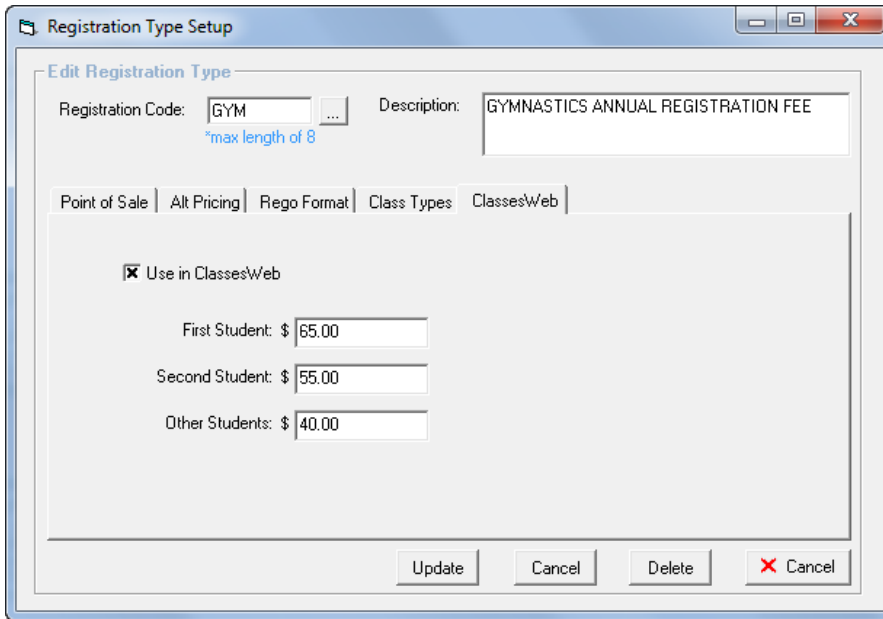
All joining fees are charged as mandatory online.

Registration fees

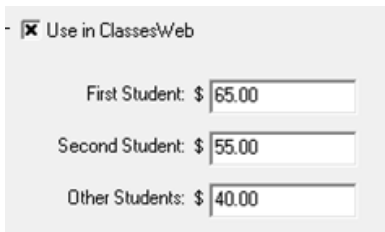
Registration fees can also be collected over the web.

Note: For a registration fee to display on the web, it must be a MANDATORY fee.

You can also separately control the prices charged on the web, including multiple Student discounts. This is setup in Admin > Classes > Registration Types > ClassWeb tab



Here are two examples of ways you could use this screen



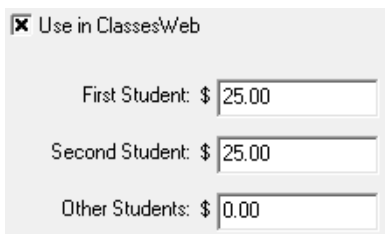
Example 1

Reg Fee is discounted per student

1st Student \$65.00

2nd Student \$20.00

Additional students \$40.00



Example 2

Max fee for family

1st Student \$25

Family total \$50

Manager Portal

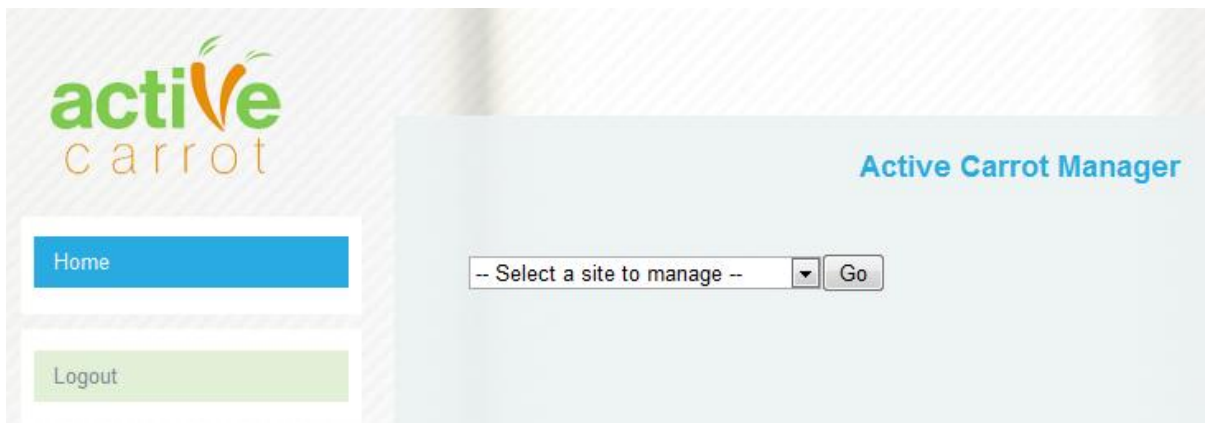
Logging into Active Carrot

Before you can login to Active Carrot you must make sure you have your manager password, as supplied by your Links Representative upon installation or as you selected on your order form. If you do not have a login, you will need to request access on official company letter head to be signed by an existing manager portal admin user and sent to support@linksmodularsolutions.com

To access the setup portal you will need to go to;

<http://secure.activecarrot.com/manager>

Then choose the site you wish to alter from the drop down



Active Carrot Configuration

Throughout the Manager Portal in Active Carrot, there are a number of mandatory fields to complete and various optional fields that can be completed depending on what you are using in Active Carrot.

Please refer below for the list of mandatory and optional configuration options.

Mandatory

The areas listed below are only mandatory if your centre is setting up this Links feature for use online. For example, if you are only wanting to sell Memberships and Visit Passes online there is no need to complete the Classes, Class Mobile, Facilities and Sessions sections.

- Site Configuration
 - Classes
 - Classes
 - Makeup Class Types
 - Class Mobile
 - Class Mobile
 - Membership
 - Membership

- Membership Terms
- Facilities
 - Facility Bookings
- Sessions
 - Session Bookings
- Public
 - Public Configuration
- General
 - Card Payment Types
 - General
 - Menu Options
 - Mobile
 - Online Store
 - Visit Passes

Optional

- Site Configuration
 - Active Carrot
 - Branding – Customer
 - Classes
 - Makeup Class Types
 - Makeup Groups
 - Class Mobile
 - Class Mobile Manager
 - Class Mobile Custom Fields
 - Class Mobile Levels
 - Membership
 - Membership After Sales Specials
 - Membership Custom Fields
 - Membership Categories
 - Membership Product Groupings
 - Membership Bundles
 - Facilities
 - Facility Booking Email Templates
 - Facility Groups/Online Discounts/Vouchers
 - Sessions
 - Session Booking Email Templates
 - Session Categories/Online Discounts
 - Session Groups (Button Labels)
 - Public
 - Public Branding Advanced
 - Public Branding Basic
 - General
 - Dashboard Message
 - Facebook Integration
 - Site Images
- Online Sales



- Online Products and Services Discounts
- Library
 - Upload Videos
- Automated Correspondence
 - Set up Reports

Site Sync

To ensure speed and ease of use for your customers some information is only sent to Active Carrot daily rather than every time a customer wants to access the information. This includes things such as Facilities and Products. It is not expected that you would add products and facilities on a regular basis, so therefore when you do add any new ones, you will need to go to Manager Portal >Site Sync and click on the options for each of the areas to make them available online.

Site Sync

Use this page if you want to sync items with the Links Database

Update Name	Action
Facilities	SYNC NOW
Store Products	SYNC NOW
Clear Cache	CLEAR NOW

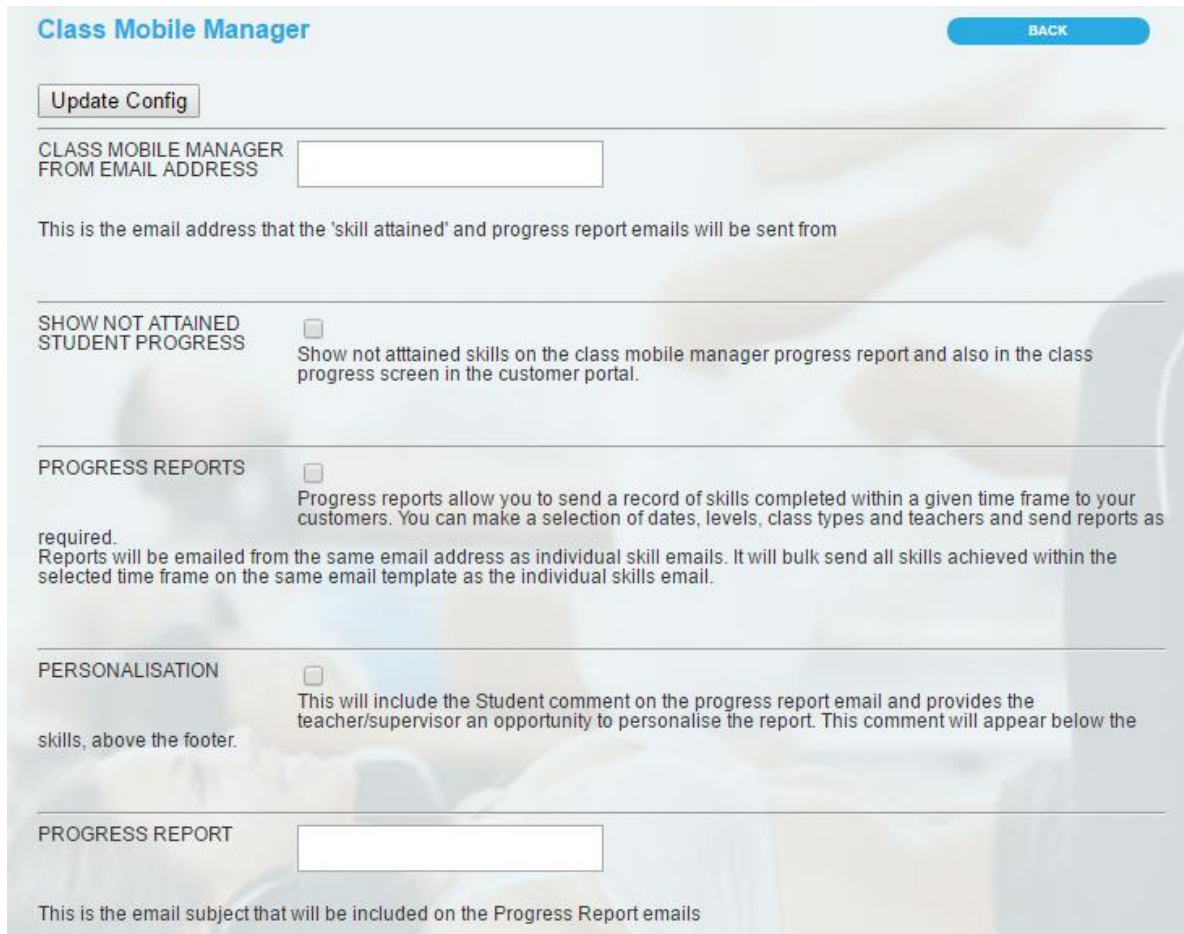
Class Progress Reports

Class Progress Reports allow you to send a report to parents to inform them of the skill/s their child has achieved during a specific period in time.

Setting up for sending Class Progress Reports

The following settings need to be selected for the progress report to be sent.

In the Manager portal go to Site Configuration > Class Mobile Manager.



Class Mobile Manager BACK

[Update Config](#)

CLASS MOBILE MANAGER FROM EMAIL ADDRESS

This is the email address that the 'skill attained' and progress report emails will be sent from

SHOW NOT ATTAINED STUDENT PROGRESS

Show not attained skills on the class mobile manager progress report and also in the class progress screen in the customer portal.

PROGRESS REPORTS

Progress reports allow you to send a record of skills completed within a given time frame to your customers. You can make a selection of dates, levels, class types and teachers and send reports as required. Reports will be emailed from the same email address as individual skill emails. It will bulk send all skills achieved within the selected time frame on the same email template as the individual skills email.

PERSONALISATION

This will include the Student comment on the progress report email and provides the teacher/supervisor an opportunity to personalise the report. This comment will appear below the skills, above the footer.

PROGRESS REPORT

This is the email subject that will be included on the Progress Report emails

The following settings are mandatory and will need to be completed to enable the reports to be sent:

- Class Mobile Manager from Email Address
- Progress Report
- Skill Attained Email Content

The following settings are optional, these can be completed to add branding and personalisation to your emails:

- Show Not Attained Student Progress
- Personalisation
- Progress Report Email Header

- Progress Report Email Header Image
- Progress Report Email Footer
- Class Mobile Manager Send Skill Confirmation Email

Sending the Class Progress Report

To send the class progress report go to the Manager Portal> Class Progress Reports.

Send Progress Reports

Students for the week Starting

Date From:

Including the following Days

Mon Tue Wed Thu [All / None](#)
 Fri Sat Sun

And Times

05:00 am 08:00 am 09:00 am 01:30 pm [All / None](#)

Class Types

HOLIDAY PROGRAM SQUAD [All / None](#)

Levels

JNR SQUAD GOLDFISH DUCKS EEL [All / None](#)
 DOLPHIN

Teachers

BATCHELOR,KIM BIBBY,JASON CONDON,TERRY CONSIDINE,JAYLEE [All / None](#)
 DRENNAN,JOANNA GANNON,LISA

Show all skills attained in the following date range

Date From:

Date To:

Progress reports can be sent to all classes, or you can send to specific classes by using the following filters:

- Students for the week Starting – This is the week you wish to include students that are currently enrolled for
- Include the following days – Select the applicable days you wish to send to or all
- Time – Select the applicable times you wish to send to or all
- Class Types – Select the class types you wish to send to or all
- Levels – Select the levels you wish to send to or all
- Teachers – Select the applicable Teachers you wish to include or all
- Show all skills attained in the following date range – Enter the dates you wish to send to that skill have been achieved for