

## Table of Contents

Admin Overview .....	6
Admin > File .....	7
Report Mail Templates.....	7
Export to Excel Utility .....	8
Copy Live to Training .....	11
Admin > Security .....	12
Staff Members .....	12
Security Groups.....	21
Menu Security.....	31
Bulk Print Staff Cards .....	33
Admin > Site.....	34
Site Details.....	34
Site Setup.....	36
Setup Locations/Other Site Parameters.....	49
Admin > Site > Setup Locations/Other Site Parameters.....	49
Customer Accounts .....	65
Admin > Site > Setup Customer Accounts .....	65
New Access Parameters .....	66
Other Sites .....	68
Audit Log.....	69
Suburbs .....	70
Web Suburbs .....	71
Visit Parameters.....	72



Table Maintenance .....	76
Mandatory Fields .....	77
Activities .....	81
Kiosk.....	82
Links Service .....	83
Admin > Admin .....	84
Roles .....	84
Card Layouts .....	85
Setup Cards .....	87
Setup Public Holidays .....	88
Access Parameters .....	90
Appointment Type Setup.....	91
Access Points.....	93
Admin > Setup PC .....	94
Admin > POS.....	98
Alternate Price Modes.....	98
Kits.....	100
Setup.....	101
Setup Receipts .....	111
Template Models .....	112
Admin > Facility.....	118
Setup Facilities.....	118
Setup Assets .....	132
Facility Settings .....	134
Web Settings.....	135

Bulk Web Registration .....	136
Bulk Facility Price Update.....	138
Bulk Facility Override Price Update.....	139
Admin > Classes.....	141
Terms .....	141
Registration Types.....	143
Class Types.....	149
Levels .....	159
Areas.....	161
Classes .....	162
Discounts.....	168
Bulk Class Price Update.....	170
Bulk Class Update.....	172
Bulk Card Print .....	174
Create Next Term Bookings.....	175
Remove Term Bookings.....	176
Admin > Classes > Remove Term Bookings.....	176
Bulk Term Class Clone.....	178
Bulk Registration Fees Allocation.....	181
Class Settings.....	182
Email Settings.....	184
Bulk Web Registration Process .....	185
Publish Web Classes.....	186
States.....	187
Admin > Products/Services.....	188
Product Master.....	188



Stock Setup .....	196
Suppliers.....	197
Services Master .....	198
Inactivate/Reactivate .....	205
Bulk Price Update .....	207
Sales Category.....	208
Product Units.....	209
Setup Units.....	209
Groupings.....	210
Admin > Memberships / Visit Pass .....	212
Membership Categories .....	212
Membership Types .....	217
Archiving .....	232
Bulk Card Print .....	234
Suspension Rollover .....	235
Suspension Rollover History .....	236
Admin > Memberships / Visit Pass .....	237
Visit Pass Categories .....	237
Visit Pass Types.....	240
Visits Pass Archiving.....	247
Visit Pass Bulk Card Print .....	252
Publish MemTypes to Web .....	253
Activities .....	253
Admin > Direct Debit .....	255
Admin > Sessions.....	256





Setup Sessions.....	256
Session Settings.....	262
Bulk Sessions Update .....	262
Admin > Messages .....	264
New Message.....	264
View Customer Message .....	267
New Bulk Message .....	268
View Bulk Message .....	270
New Staff Message .....	271
View Staff Messages .....	272
View Messages for Roles .....	273

## Admin Overview

The Admin Module is the Administration Tool of Links Modular Solutions and is used to set up all your modules. You are first required to go through all the menu options within this operating tool before using the other modules.

Throughout your continued use of the program you will need to utilise the Admin Module to perform maintenance tasks such as updating prices, and direct debit functions. You should carefully consider who has access to this module as changing particular parameters can have a significant impact upon your database setup. There may be some functions that need to be restricted and others that do not. For this reason the use of menu security within the security group setup can be used.

Before performing any changes if you are unsure of the outcome you should contact Links Modular Solutions to confirm the outcome of any changes first.

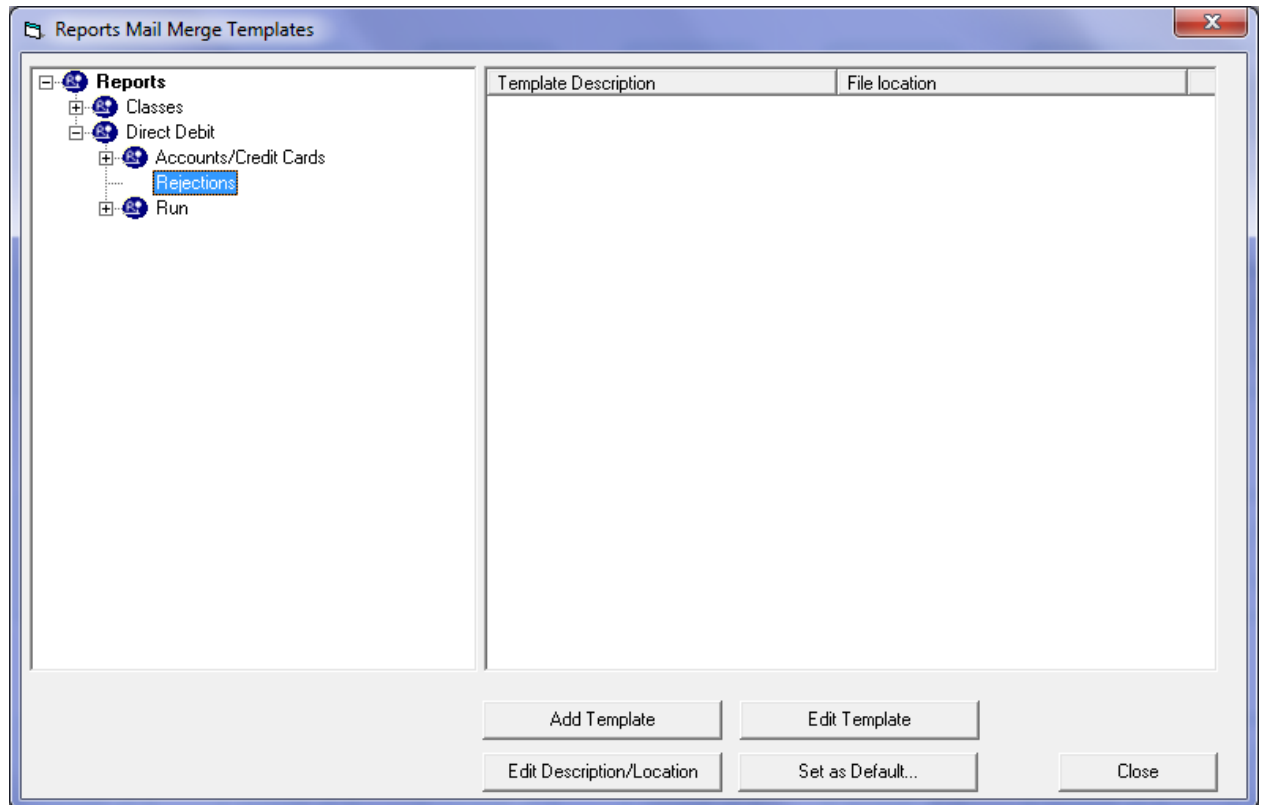
LMS Support

Online Support: [www.linksmodularsolutions.com.au/support](http://www.linksmodularsolutions.com.au/support)

Email: [support@linksmodularsolutions.com](mailto:support@linksmodularsolutions.com)

## Report Mail Templates


Admin > File > Report Mail Templates

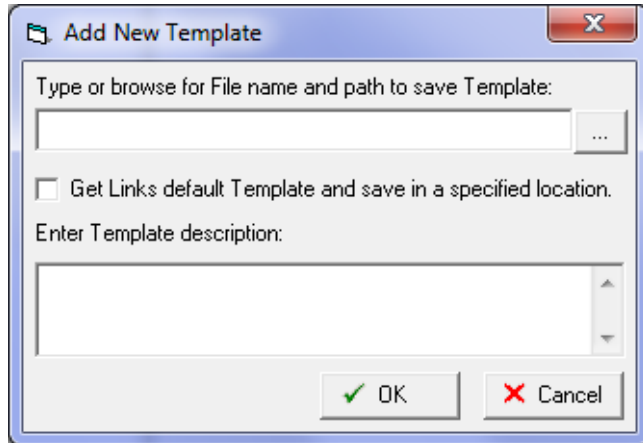


This screen creates and allocates templates that can be used for selected reports.

### *Creating a Template*

From the left hand screen select the report that a template will be created and assigned to. In the example above, the template will be used to create a rejection letter from the Direct Debit rejection process.

Once the report has been highlighted press the  button and the following screen is displayed.

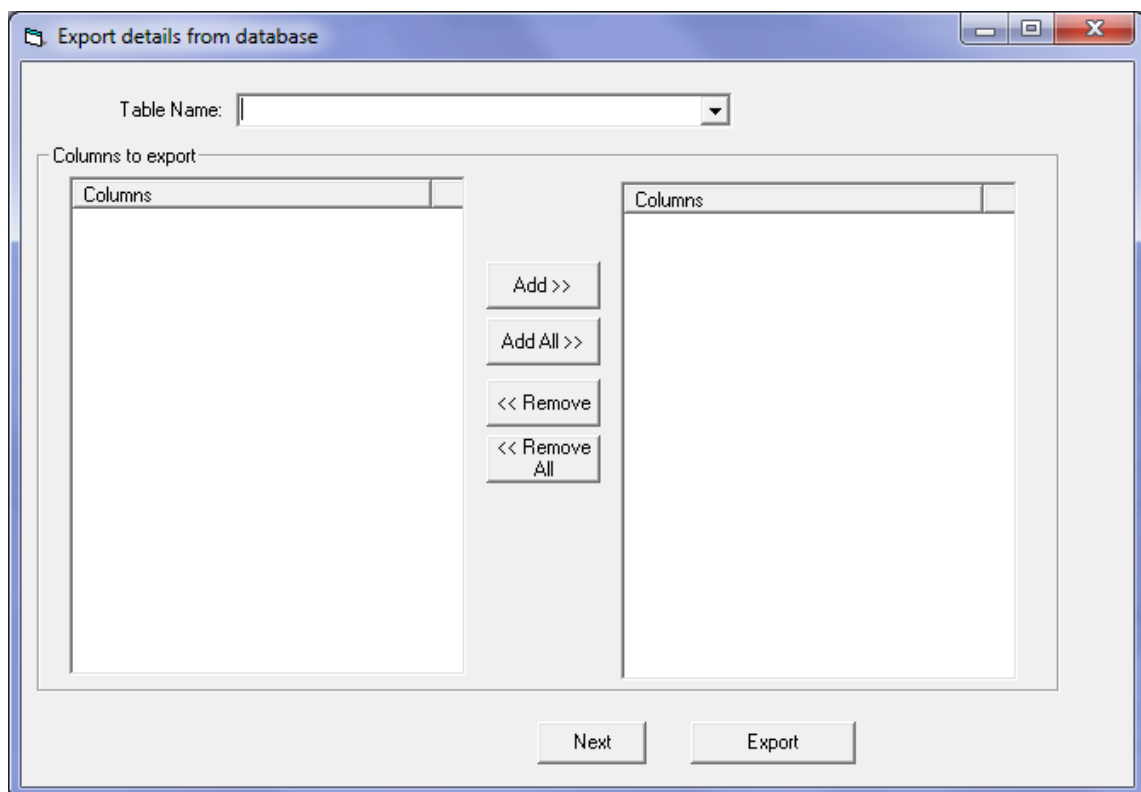


Type in a path and file name to save the template.

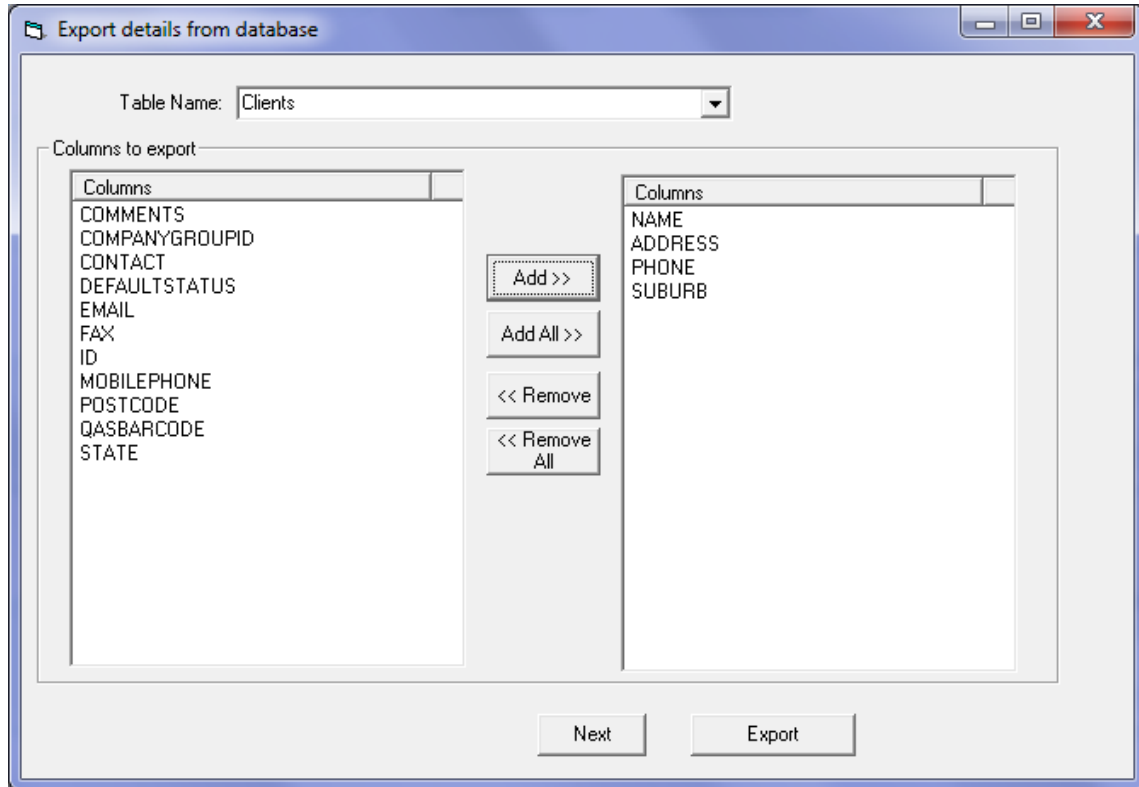
### Export to Excel Utility

Admin > File > Export to Excel Utility

This window allows for the exporting of data from selected tables directly into an Excel Spreadsheet.




1. Select the table you want to view
2. Select the particular fields within the table you wish to have display in Excel and then select 

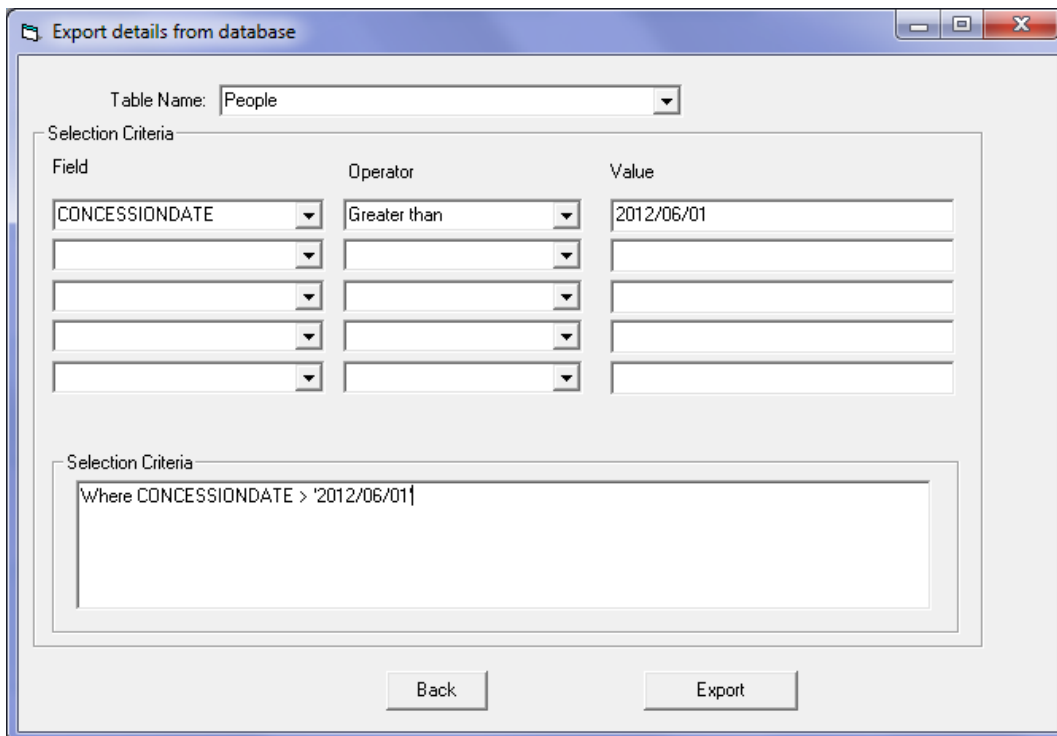
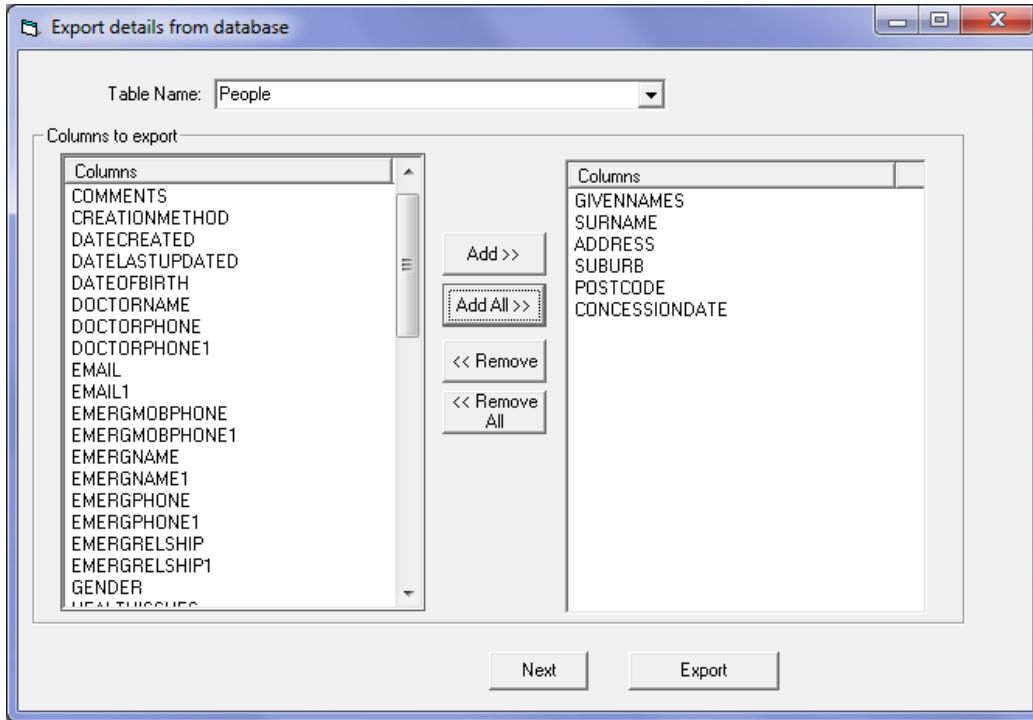


3. The relevant data will now display in Excel.

#### *Refining Selection to be Exported*

The export utility allows you to create statements to aid in refining selection criteria.

To access this feature press the  button after selecting the data to be exported.



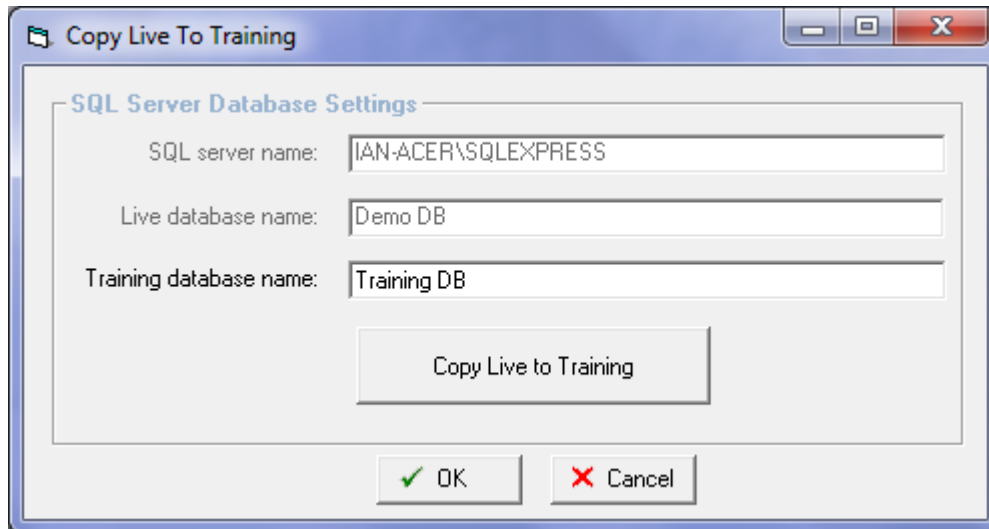
1. From the Field section select the data field that contains the data required for the selection process.
2. Select the Operator from the drop down list. This operator will define the rules of the selection process.

3. The Value is the data that the user can enter to define the outcome. Once complete the selection criteria are displayed as a statement.

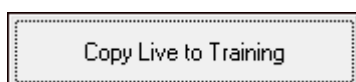
(In the above example, the user has written the selection criteria statement to select all customers who have a concession expiry date greater than the 1 June 2012.)

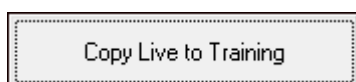
### Copy Live to Training

Admin > File > Copy Live to Training



The Copy Live to Training function allows the current Live database to be replicated in the Training Database. The current Training Database will be deleted. Only users in the Administrators Security Group have access to this function and all users must be logged out of Training Mode in order to complete Copy Live to Training.

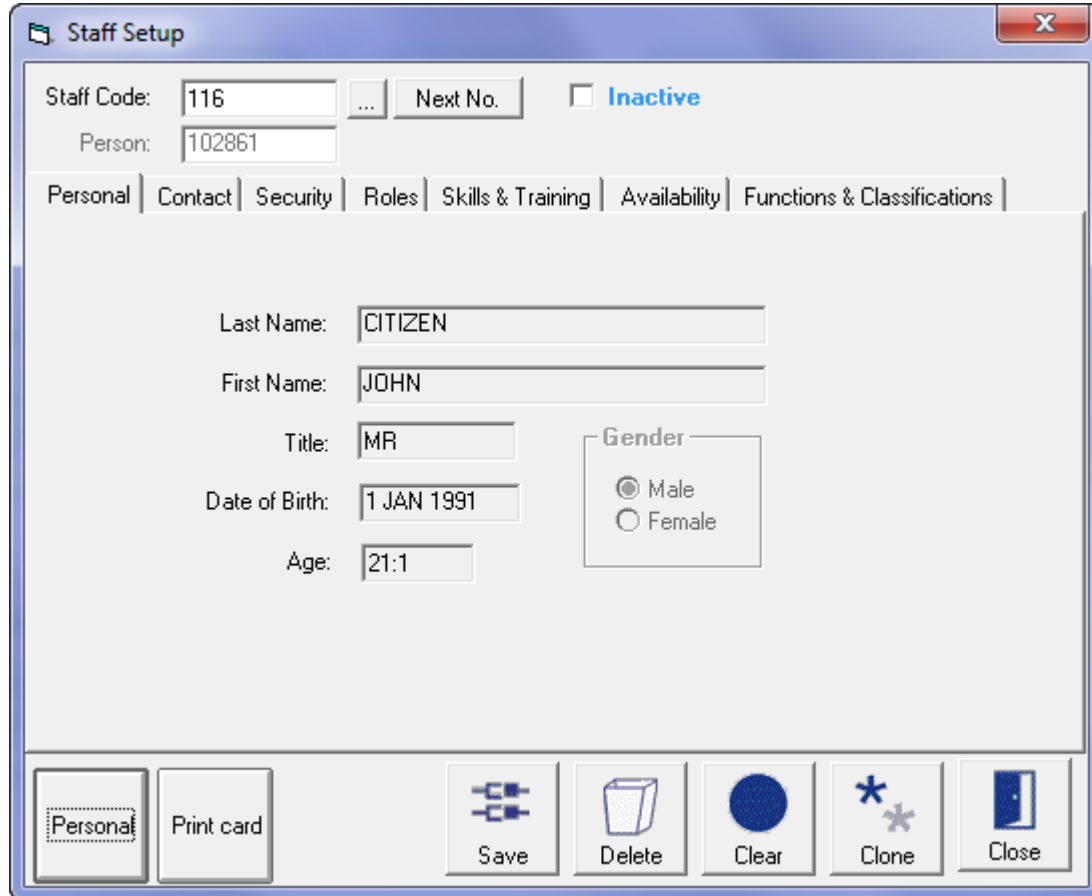


Select  and you will be prompted to confirm that you wish to delete the current Training Database and copy the entire contents of the Live Database, followed by a prompt to ensure all users are currently logged out of the Training Database.

## Admin > Security

### Staff Members

Admin > Security > Staff Members




The screenshot shows a 'Staff Setup' window with the following fields and options:

- Staff Code: 116
- Next No. button
- Inactive checkbox (unchecked)
- Person: 102861
- Navigation tabs: Personal, Contact, Security, Roles, Skills & Training, Availability, Functions & Classifications
- Last Name: CITIZEN
- First Name: JOHN
- Title: MR
- Date of Birth: 1 JAN 1991
- Age: 21:1
- Gender: Male (selected), Female
- Buttons: Personal, Print card, Save, Delete, Clear, Clone, Close

Admin > Security > Staff Members > Personal

#### Staff ID

Type in a staff identification, this is generated by the user and can be either numeric or alpha. Do not put spaces into this field. You also have the option of having Links generate the Staff ID number by clicking the  icon.

The staff member may already be a customer within the system and this Customer ID can also be used.

#### Inactive

Flag the **Inactive** button when the staff member leaves the organisation and they will automatically be removed from all Security Groups and permissions. The staff member should not be deleted as the activity log monitors audited functions and utilises the Staff ID.





To print a card for this staff person, click on this icon



Click on this icon to save any changes made to this window.



Click on this icon to delete this entry.



Click on this icon if you wish to clear/refresh the window.



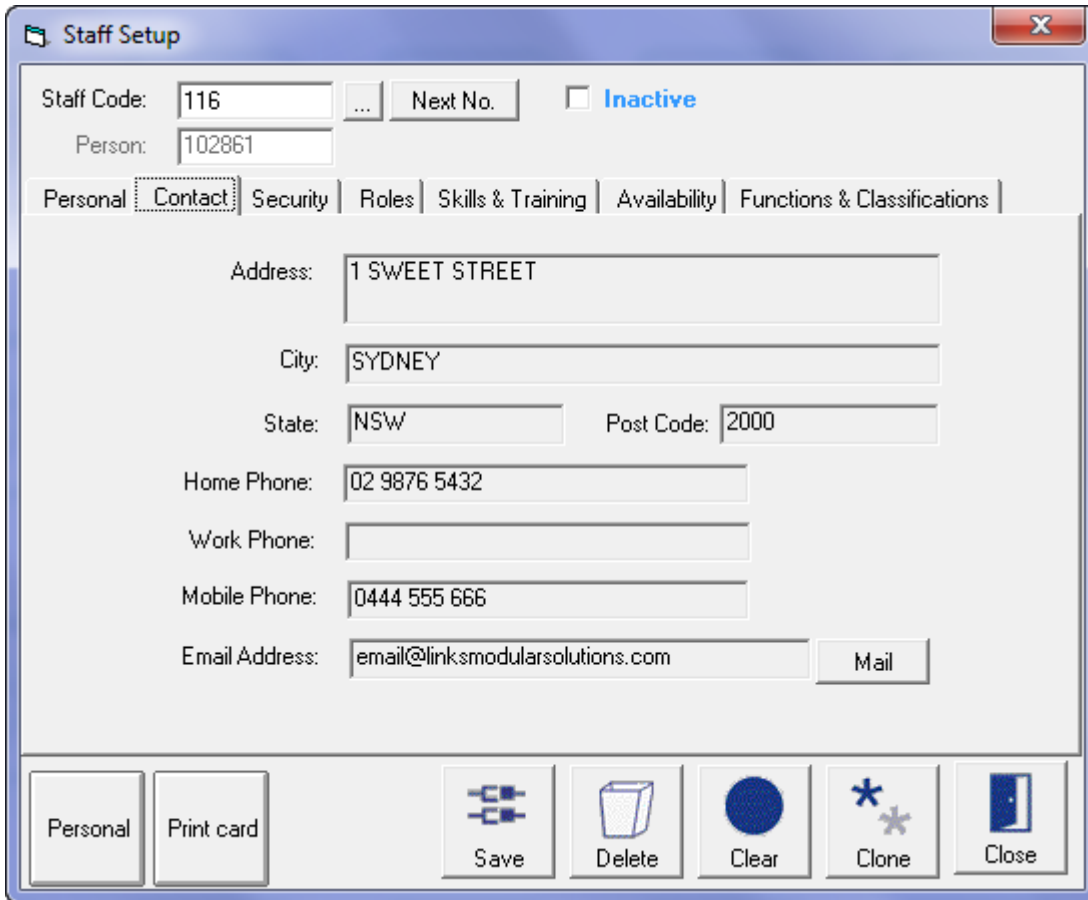
Click on this icon if you wish clone/copy the current window.



Click on this icon if you wish to close out of the window.

Admin > Security > Staff Members > Contact

The staff member's contact details are outlined here.

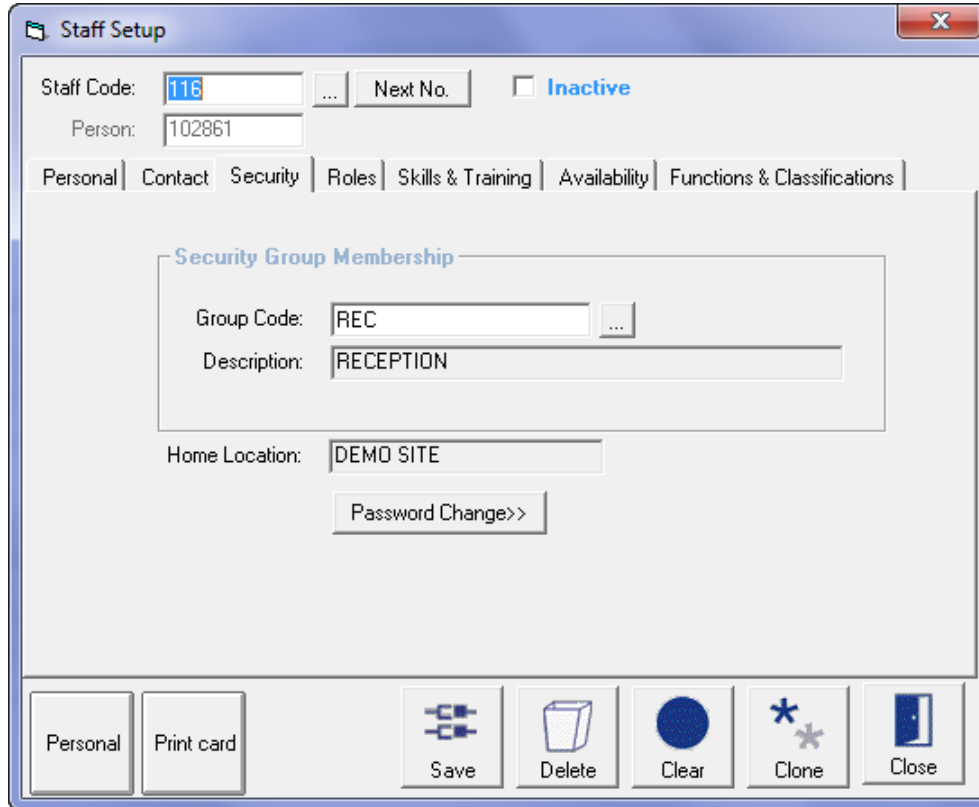


The screenshot shows a web application window titled "Staff Setup" with a close button (X) in the top right corner. The window contains the following fields and controls:

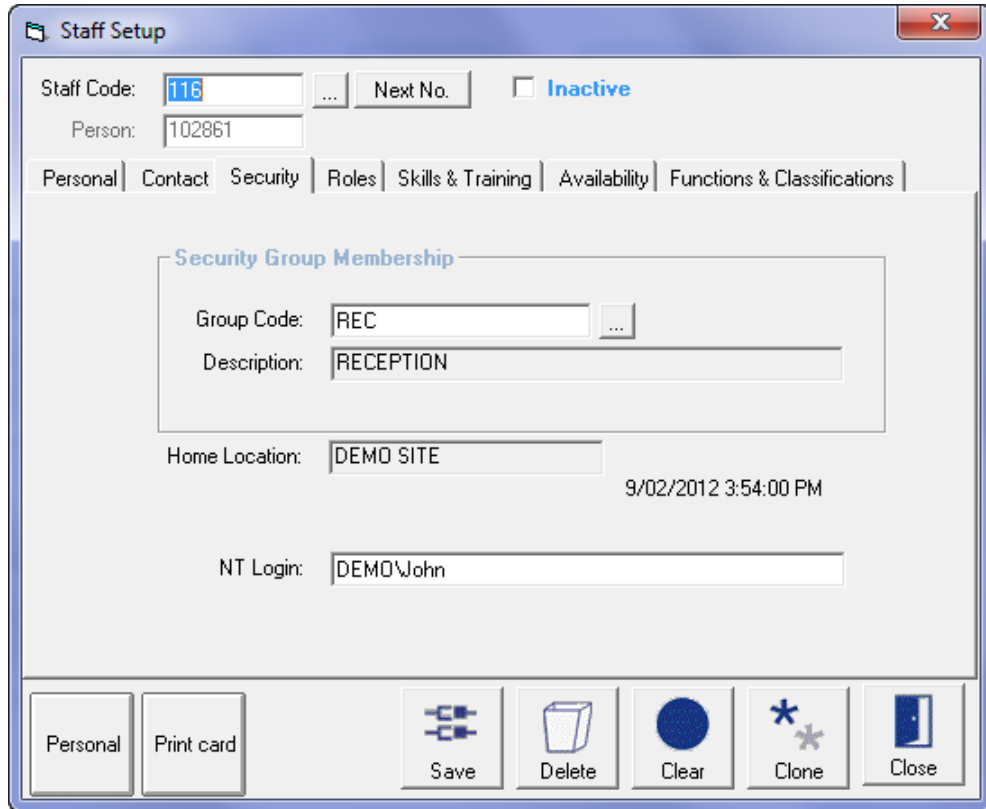
- Staff Code: 116 (with a dropdown arrow) and Next No. (with a dropdown arrow)
- Inactive
- Person: 102861
- Navigation tabs: Personal, Contact (selected), Security, Roles, Skills & Training, Availability, Functions & Classifications
- Address: 1 SWEET STREET
- City: SYDNEY
- State: NSW
- Post Code: 2000
- Home Phone: 02 9876 5432
- Work Phone: (empty)
- Mobile Phone: 0444 555 666
- Email Address: email@linksmodularsolutions.com (with a Mail button)
- Bottom navigation bar: Personal, Print card, Save, Delete, Clear, Clone, Close

Admin > Security > Staff Members > Security

This window will show what security group this staff member is allocated to. To allocate a security group see Admin > Security > Security Groups.



The screenshot shows a software window titled "Staff Setup" with a close button in the top right corner. The window contains several input fields and a tabbed interface. At the top, there are fields for "Staff Code" (containing "116"), "Next No.", and an "Inactive" checkbox. Below this is a "Person" field with the value "102861". A horizontal tab bar includes "Personal", "Contact", "Security" (which is selected), "Roles", "Skills & Training", "Availability", and "Functions & Classifications". The main content area is titled "Security Group Membership" and contains a "Group Code" field with "REC", a "Description" field with "RECEPTION", and a "Home Location" field with "DEMO SITE". A "Password Change>>" button is located below the Home Location field. At the bottom of the window, there is a row of buttons: "Personal", "Print card", "Save", "Delete", "Clear", "Clone", and "Close".



The screenshot shows a 'Staff Setup' window with the following fields and options:

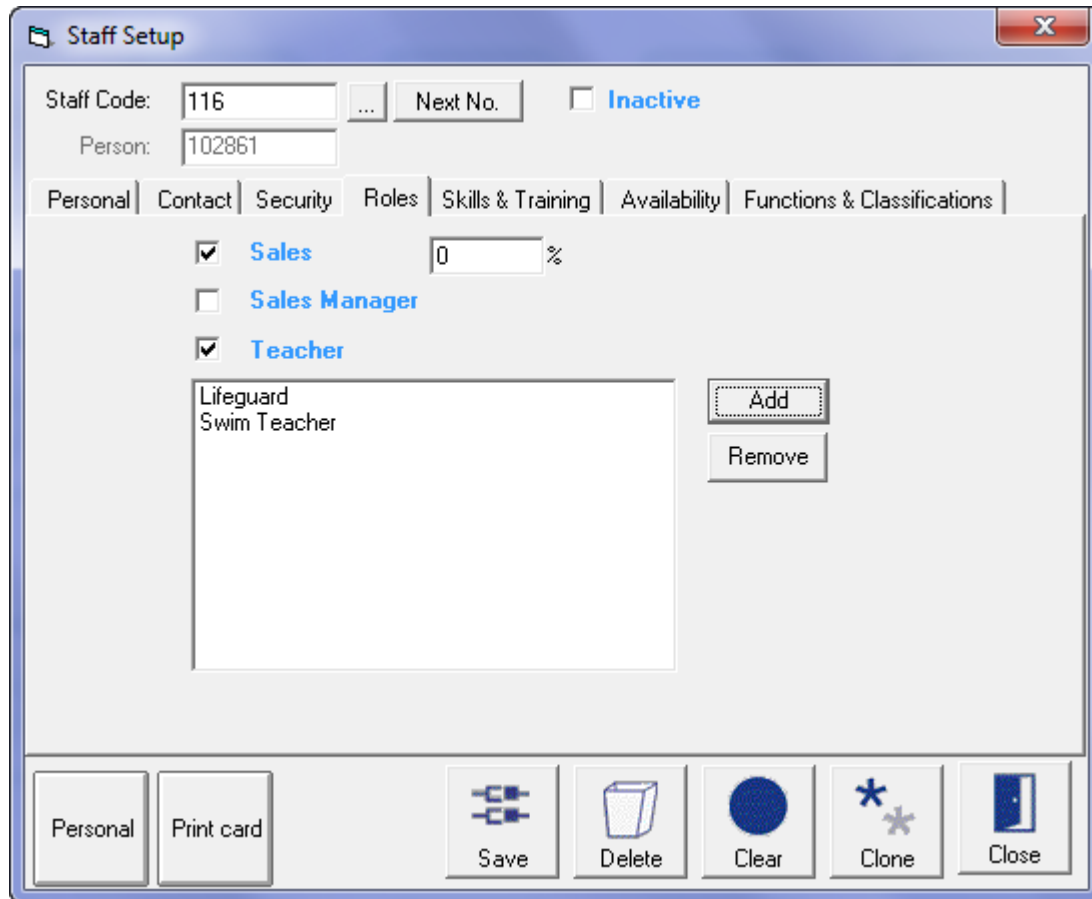
- Staff Code: 116 (with a 'Next No.' button and an 'Inactive' checkbox)
- Person: 102861
- Navigation tabs: Personal, Contact, Security, Roles, Skills & Training, Availability, Functions & Classifications
- Section: Security Group Membership
- Group Code: REC (with a dropdown arrow)
- Description: RECEPTION
- Home Location: DEMO SITE
- Timestamp: 9/02/2012 3:54:00 PM
- NT Login: DEMO\John
- Buttons at the bottom: Personal, Print card, Save, Delete, Clear, Clone, Close

Passwords can be entered or changed by pressing the Password Change button.

If NT Authentication has been selected at the site level, then the NT login is required to be filled in for each staff member. This login must following the following criteria of Domain\Username. This will allow the system to utilise the NT username and password for secured functions.

Admin > Security > Staff Members > Roles

The staff member can be allocated to Staff Roles. To allocate several staff to a role refer to Admin > Admin > Staff Roles.



Sales

If the staff member is selling membership contracts and you wish to track their performance then this option must be flagged. You can also enter a commission percentage if you wish to.

Teacher

Select this option if this person is a teacher (Classes or Sessions). This will allow for a narrowing of potential staff members when searching for a teacher in the aforementioned programs.



Add a staff role by selecting from a list of roles.



Highlight a staff role and press the Remove button to remove the role from the staff member.

New Role

Add a new role to the Staff Role list.

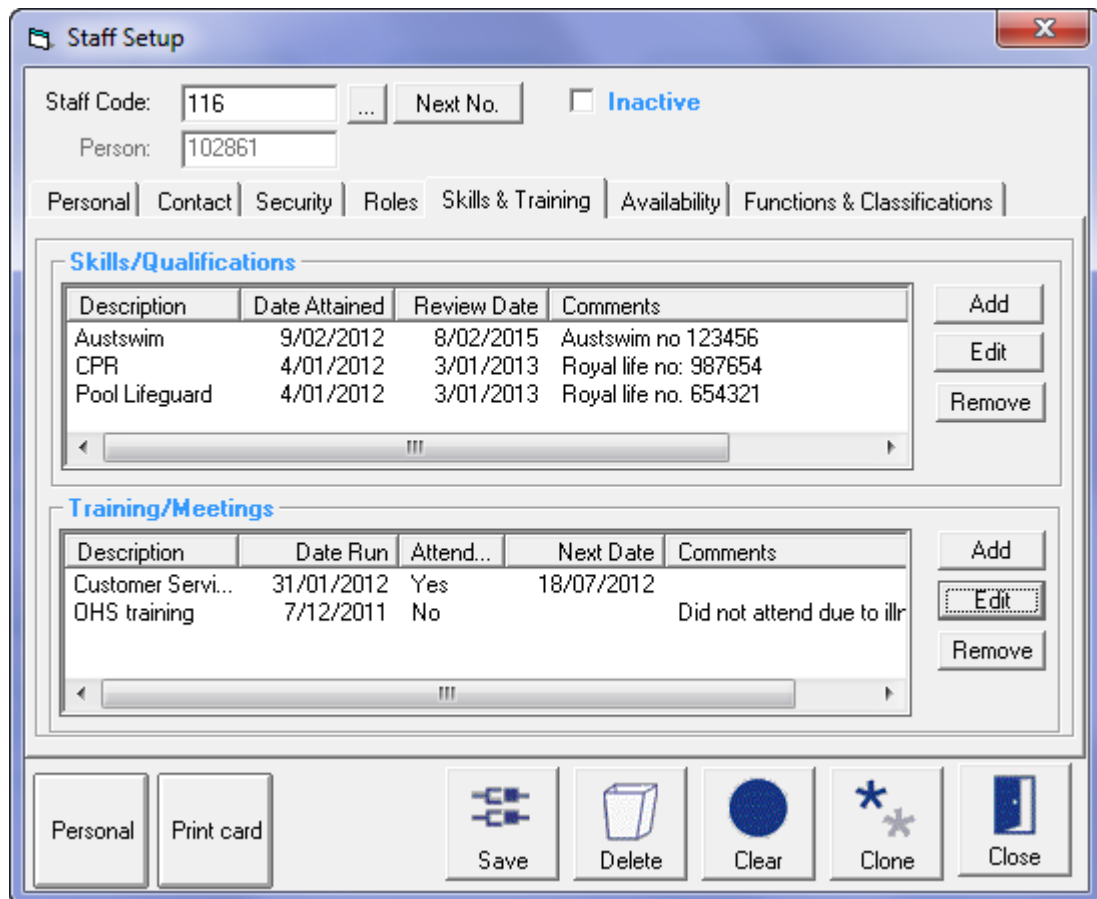
Admin > Security > Staff Members > Skills and Training

This screen allows for the recording of:

1. Skills and/or Qualifications with attainment and renew dates.

A report in the Reporting Module will identify those who have approaching review dates

2. Training and or Meeting requirements and attendances.



The screenshot shows the 'Staff Setup' window with the following details:

- Staff Code: 116, Next No. button, Inactive checkbox
- Person: 102861
- Tabs: Personal, Contact, Security, Roles, Skills & Training (selected), Availability, Functions & Classifications
- Skills/Qualifications** section:
 

Description	Date Attained	Review Date	Comments
Austswim	9/02/2012	8/02/2015	Austswim no 123456
CPR	4/01/2012	3/01/2013	Royal life no: 987654
Pool Lifeguard	4/01/2012	3/01/2013	Royal life no. 654321
- Training/Meetings** section:
 

Description	Date Run	Attend...	Next Date	Comments
Customer Servi...	31/01/2012	Yes	18/07/2012	
OHS training	7/12/2011	No		Did not attend due to illr
- Buttons: Personal, Print card, Save, Delete, Clear, Clone, Close



Add by selecting from a list



Highlight the record and press the Edit button to modify.

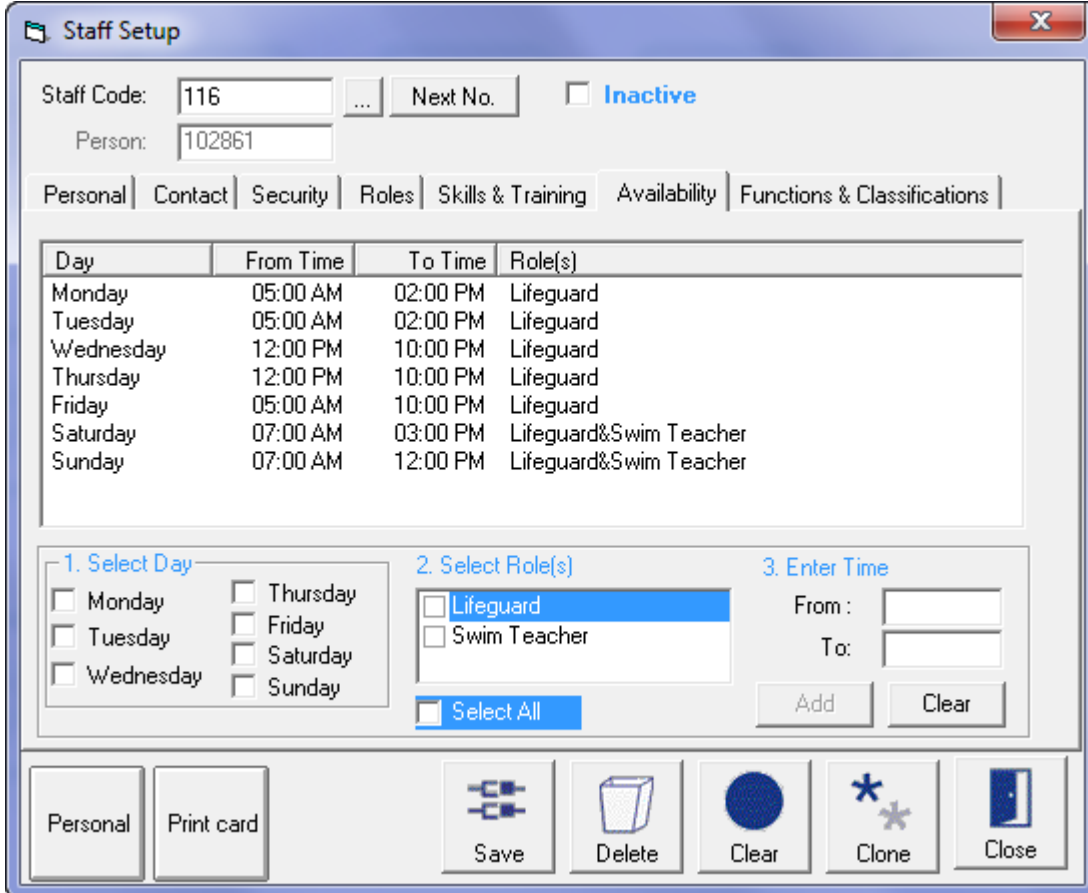


Highlight the record and press the Remove button to remove the record.

Admin > Security > Staff Members > Availability

An Availability roster by Staff Role can be established using the information entered in this screen.

A report in the Reporting Module will identify those who are available to work using selected criteria.



The screenshot shows the 'Staff Setup' window for staff member 116. The 'Availability' tab is selected, displaying a table of availability records. Below the table are three sections for configuring new records: '1. Select Day', '2. Select Role(s)', and '3. Enter Time'. The 'Add' button is highlighted in the bottom right of the configuration area.

Day	From Time	To Time	Role(s)
Monday	05:00 AM	02:00 PM	Lifeguard
Tuesday	05:00 AM	02:00 PM	Lifeguard
Wednesday	12:00 PM	10:00 PM	Lifeguard
Thursday	12:00 PM	10:00 PM	Lifeguard
Friday	05:00 AM	10:00 PM	Lifeguard
Saturday	07:00 AM	03:00 PM	Lifeguard&Swim Teacher
Sunday	07:00 AM	12:00 PM	Lifeguard&Swim Teacher

1. Select Day

Monday     Thursday  
 Tuesday     Friday  
 Wednesday     Saturday  
 Sunday

2. Select Role(s)

Lifeguard  
 Swim Teacher  
 Select All


3. Enter Time

From :   
 To :

Add    Clear

Personal    Print card    Save    Delete    Clear    Clone    Close

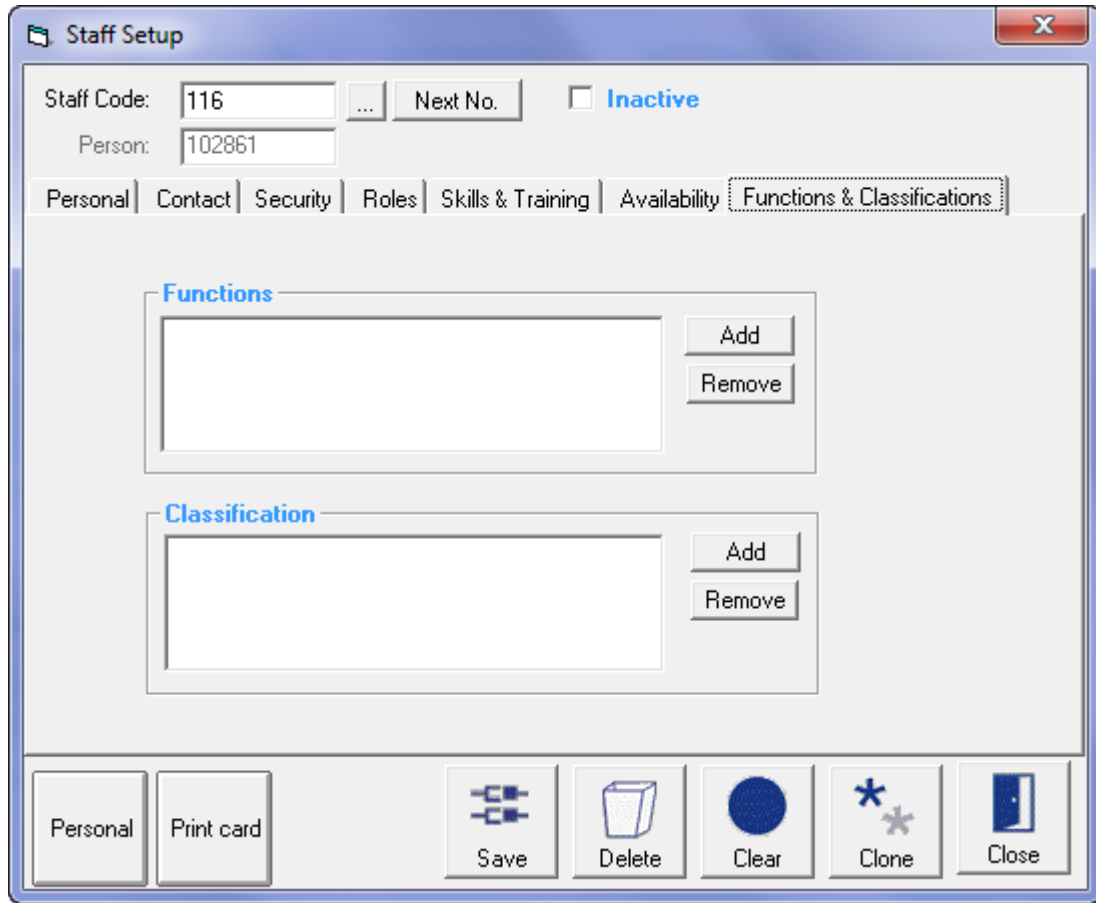
To enter availability for a staff member:

1. Select the day/s for the role
2. Select the role/s
3. Enter the time span of availability
4. Press the  button

To delete a record, highlight the record and click the  button.

Admin > Security > Staff Members > Functions and Classifications

The Functions and Classifications functionality is no longer in use.



The screenshot shows a software window titled "Staff Setup" with a close button (X) in the top right corner. The window contains the following elements:

- Staff Code: 116 (text input) with a "Next No." button and an "Inactive" checkbox.
- Person: 102861 (text input).
- Navigation tabs: Personal, Contact, Security, Roles, Skills & Training, Availability, and Functions & Classifications (the active tab).
- Functions** section: A large empty text area with "Add" and "Remove" buttons to its right.
- Classification** section: A large empty text area with "Add" and "Remove" buttons to its right.
- Bottom toolbar: Buttons for "Personal", "Print card", "Save" (with a double-headed arrow icon), "Delete" (with a trash can icon), "Clear" (with a blue circle icon), "Clone" (with a star icon), and "Close" (with a document icon).

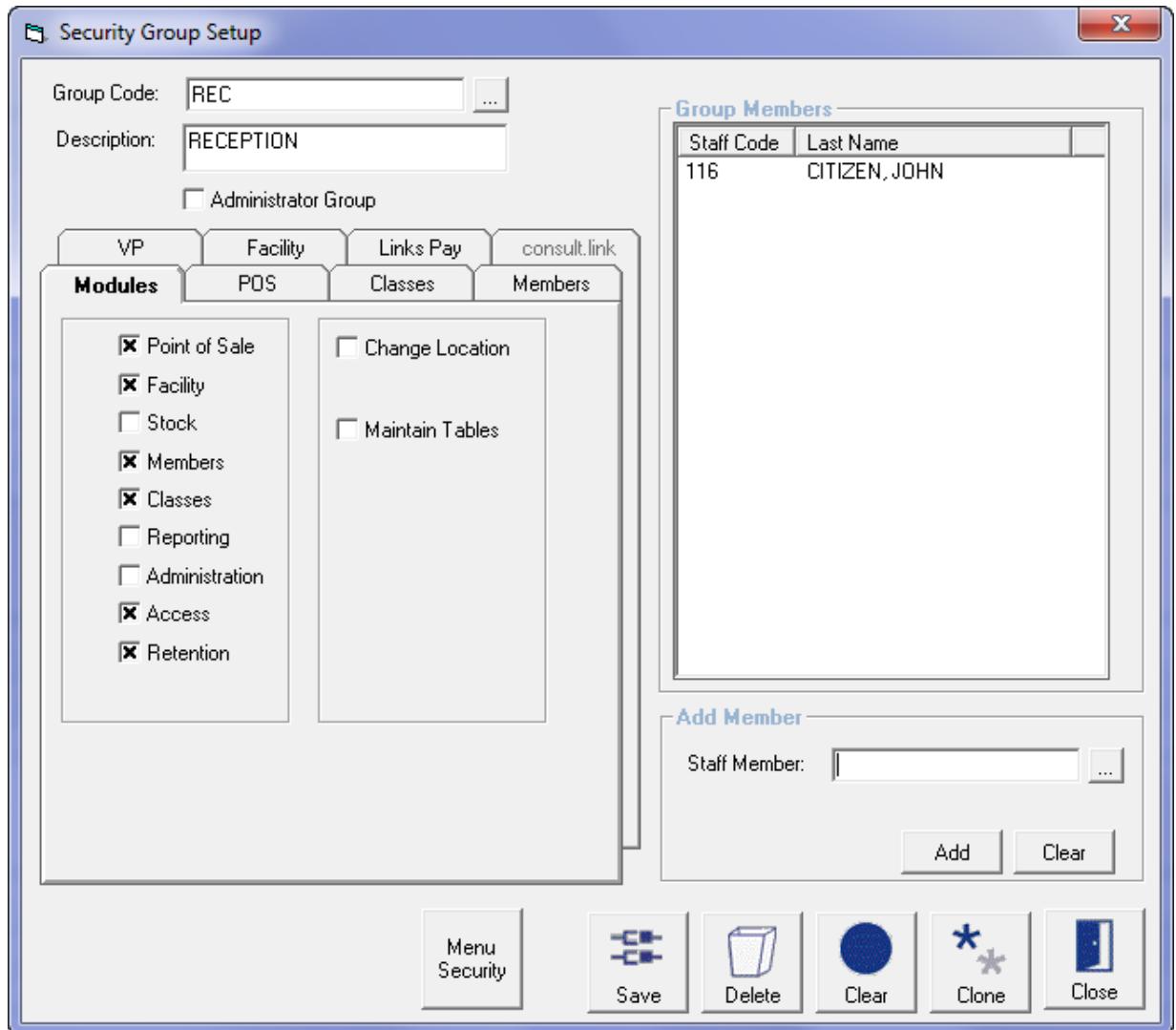



## Security Groups

Admin > Security Groups

Security Groups allow restrictions on the access staff have to and within the Links Modules. You have the option of restricting staff access to modules or functionalities within modules, as well as menu security within modules.

Note: Staff must first be entered into your system before proceeding with this section. See Admin > Security > Staff Members.



- Group Code                      Type in a code to represent the group to be created or click on the  to select an existing group that needs to be modified
- Description                      Type in the group code description

Flagging this option will make this group have complete access to all modules and functionalities of Links. If the Security Group is not identified as an Administrator group, you will be required to select the modules and functionality access

Administrator Group

### Add a Member


#### Staff Member

Click on the  to search for the staff member

or

Click on the  icon to save the staff person to the security group or click on the  icon to not save the staff person.

### Group Members

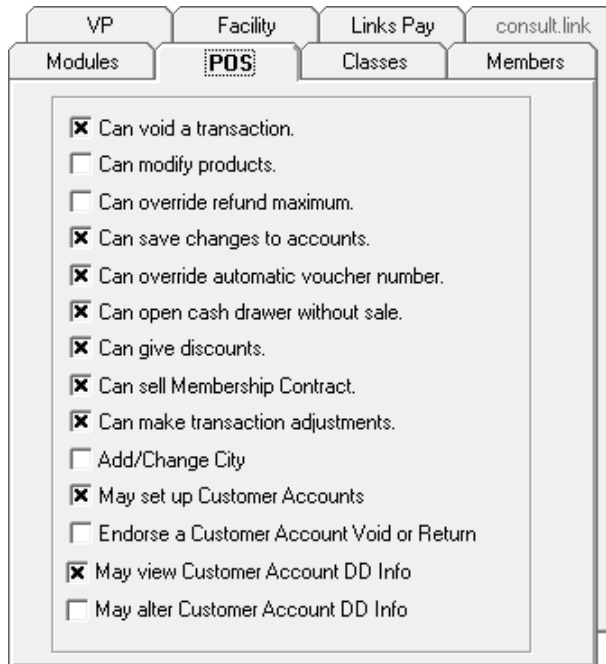
This section lists all the staff persons that have been assigned to this Security Group. To delete a staff person from the group highlight the staff person and click the  icon.

Admin > Security Groups > Modules

VP	Facility	Links Pay	consult.link
<b>Modules</b>	POS	Classes	Members
<input checked="" type="checkbox"/> Point of Sale <input checked="" type="checkbox"/> Facility <input type="checkbox"/> Stock <input checked="" type="checkbox"/> Members <input checked="" type="checkbox"/> Classes <input type="checkbox"/> Reporting <input type="checkbox"/> Administration <input type="checkbox"/> Access <input checked="" type="checkbox"/> Retention	<input type="checkbox"/> Change Location <input type="checkbox"/> Maintain Tables		

E.g: Stock, Reporting, Admin and Access will not be accessible to staff members placed in this group; nor will they have access to Change Locations and Maintain Tables.

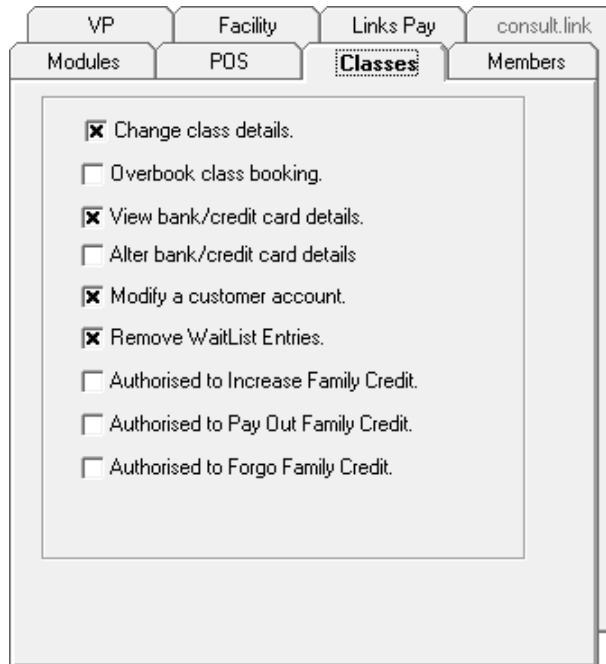
Point of Sale



Can void a transaction	Enables the staff member to void a transaction that has been processed in POS. A reason must be given when voiding a transaction.
Can modify products	No longer in use
Can override refund maximum	The refund maximum is set in Admin> POS> Setup Point of Sale. This function enables the staff member to override the amount that is set here.
Can save changes to accounts	Allows users to pay against un-issued invoices
Can override automatic voucher number	When setting up vouchers in Admin> POS> Setup Point of Sale, you can decide if Links will automatically issue a number for a voucher. This function allows a staff member to override this number and enter a number they want.
Can open cash drawer without sale	This allows the staff member to open the cash drawer without making a sale. This can be audited if you allow staff members to do this.

Can give discounts	This allows staff members to give a discount on a service, product, VP or membership. This can be audited if you allow staff members to do this. They also need to enter in a reason if they do give a discount.
Can sell a membership contract	This allows staff members to sell a membership contract through Point of Sale.
Can make transaction adjustments	This allows staff to enter retrospective adjustments. A function only usually issued to senior back of house staff members
Add/Change suburb	Allows the staff member to enter in suburbs. This can mean that you can end up with multiple suburbs for one suburb, eg: East Brunswick, Brunswick, Brunswick East all with the same Postcode. Usually only allowed by senior staff.
May set up customer accounts	Allows staff members to set up customer accounts so they can make purchases with their card.
Endorse a customer account void or return	Allows staff members to process a void or return to a customer's account.
May view customer account DD info	Allows staff members to view bank/credit card details loaded if the customer has an 'Add to DD' account.
May alter customer account DD info	Allows staff members to alter bank/credit card details if the customer has an 'Add to DD' account.

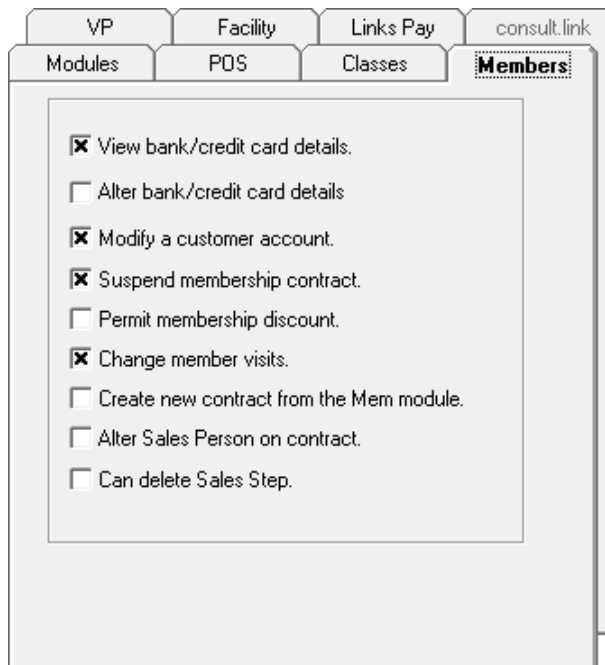
## Classes



Can void a transaction	Enables the staff member to void a transaction that has been processed in POS. A reason must be given when voiding a transaction.
Can modify products	No longer used
Can override refund maximum	The refund maximum is set in Admin> POS> Setup Point of Sale. This function enables the staff member to override the amount that is set here.
Can save changes to accounts	Allows users to pay against un-issued invoices
Change class details	Allows staff members to change the Teacher, Level and Area of a class.
Overbook class booking	Allows staff members to overbook the class number that is set in the class set up screen.
View bank/credit card details	Allows staff members to view bank/credit card details of a Family.

Alter bank/credit card details	Allows staff members to alter bank/credit card details of a Family.
Modify a customer account	Allows staff members to make adjustments on a Responsible Persons account.
Remove a waitlist entry	Allows staff members to remove a student from the classes waitlist.
Authorised to increase family credit	Allows staff members to increase family credit within the Families Screen (Not through Point of Sale)
Authorised to pay out family credit	Allows staff members to pay out family credit.
Authorised to forgo family credit	Allows staff members to forgo family credit, usually only provided to senior or accounting staff.

### Members



View bank/credit card details	Allows staff members to view bank/credit card details of a member.
-------------------------------	--



Alter bank/credit card details	Allows staff members to alter bank/credit card details of a member.
Modify a customer account	Allows staff members to make adjustments to a members account.
Suspend a membership contract	Allows staff members place a member on suspension through the Members module.
Permit a membership discount	Allows staff members to give a discount at the time of selling the membership.
Change member visits	Allows staff members to change the number of times a customer has visited the centre.
Create new contract from the Mem module	Allows staff members to set up a new contract for a customer and not require money through Point of Sale.
Alter sales person on contract	Allows staff members to change the sales person that sold the membership contract.
Can delete a sales step	Allows staff members to delete a Retention step.

### Visit Passes



Modules PDS Classes Members

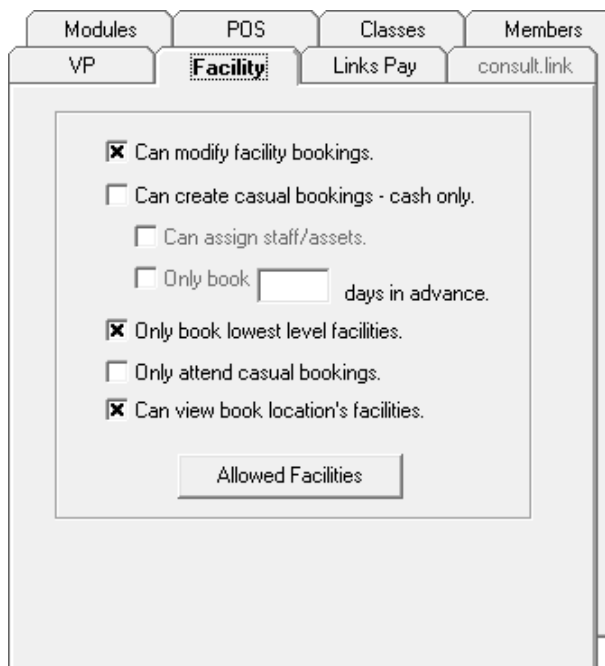
VP Facility Links Pay consult.link

Create new contract from the Setup VP screen.

Create new contract from the setup VP screen

Allows staff members to set up a new visit pass for a customer and not require money through Point of Sale.

### Facility



Modules PDS Classes Members

VP Facility Links Pay consult.link

Can modify facility bookings.

Can create casual bookings - cash only.

Can assign staff/assets.

Only book  days in advance.

Only book lowest level facilities.

Only attend casual bookings.

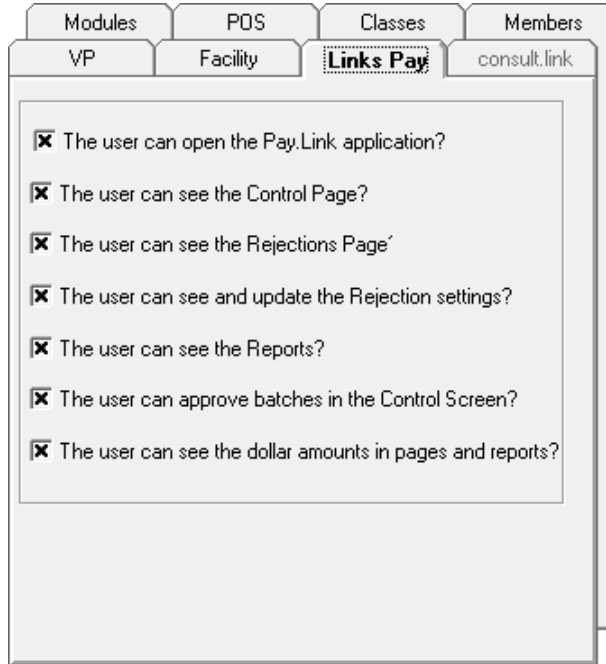
Can view book location's facilities.

Allowed Facilities



Can modify bookings	Allows staff members to change a booking within the facility module once a booking is created.
Can create casual bookings – cash only	Allows staff members to only be able to create casual bookings, not bookings for customers and clients.
Can assign staff/assets	Allows staff members to assign staff/assets to a facility booking.
Only book x days in advance	Allows staff members to only be able to book xxx days in advance.
Only book lowest level facilities	<p>Allows staff members to only book lowest level, e.g. If a facility setup looked like this, they would only be able to book Lane 1.</p> <ul style="list-style-type: none"> <li>▪ Centre <ul style="list-style-type: none"> <li>↳ 50M pool</li> <li>↳ Lane 1</li> </ul> </li> </ul>
Only attend casual bookings	Staff members would only be able to attend casual bookings, not customer or client bookings.
Can view book locations facilities	Allows staff members to book at other locations if the site is multi location.
Allowed facilities	Shows what facilities staff members can view/book using the other rules. For example they may be able to Book Locations Facilities but then only be allowed to actually book 1 facility at one other location.

LinksPay



The user can open the Pay.Link application

Select if they can

The user can see the Control Page

Select if they can

The user can see and update the Rejection settings

Select if they can

The user can see the Reports

Select if they can

The user can approve batches in the Control Screen

Select if they can

The user can see the dollar amounts in pages and reports

Select if they can

## Menu Security

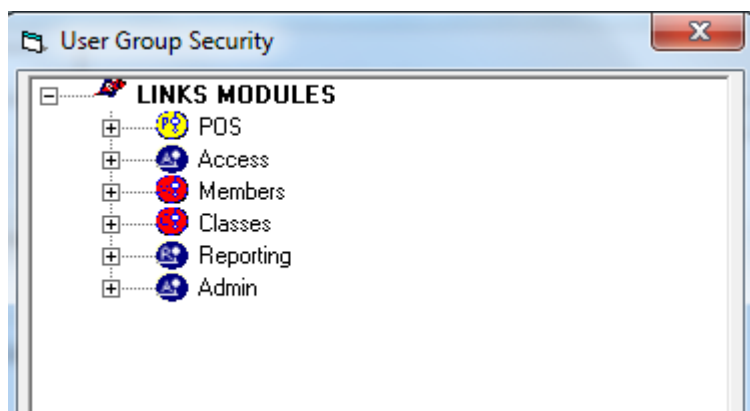
Admin > Security > Security Groups > Menu Security

Once the module and function security are completed it is also possible to add menu security to the active modules. Therefore, whilst staff may be given authority to open a module, their ability to access the menus and sub menus within the module can also be limited.



To gain access to the menu security press the Menu Security button and the following screen will be displayed:

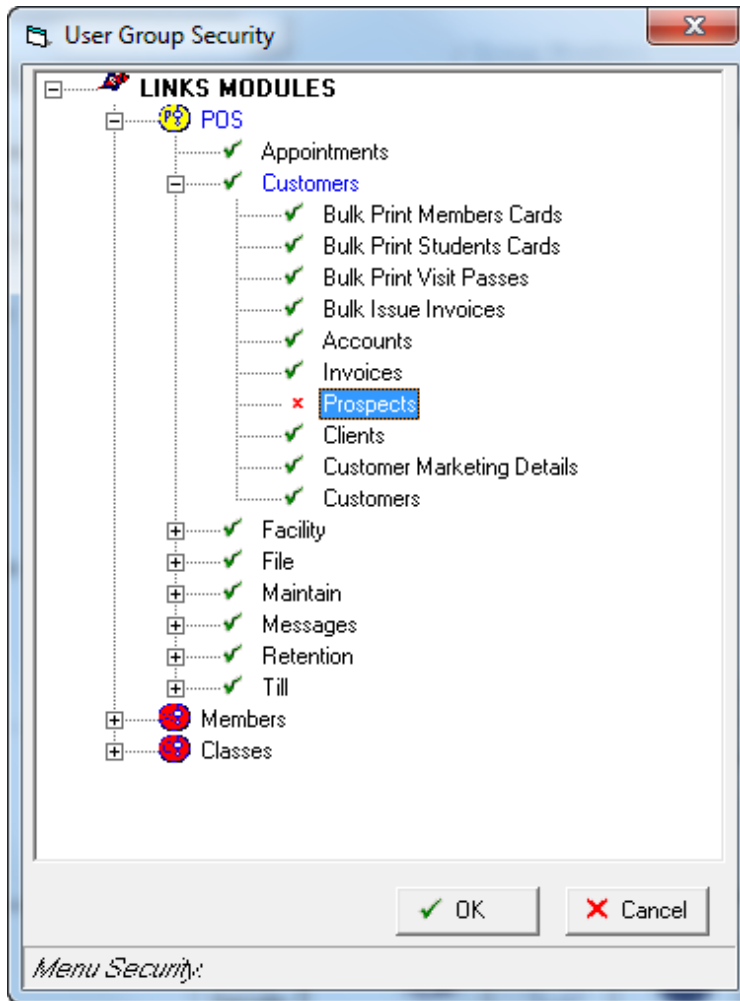
Note: Only those modules that have been included in this security group will be displayed.



In this window the + icon indicates there are further menus under main modules or menu

Double click on the menu item that needs to be excluded and a red 'x' is displayed.

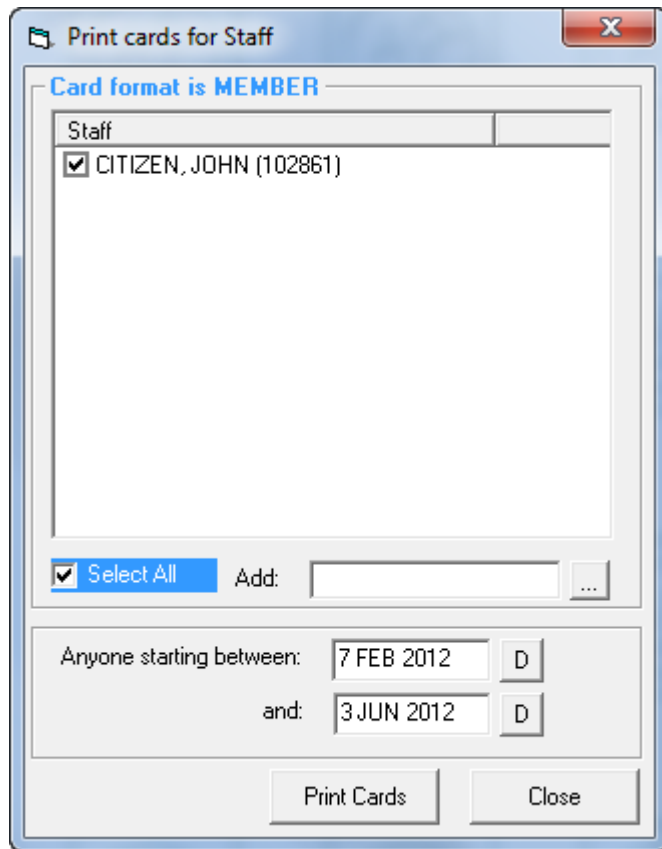
Note: As an item is selected in a sub menu, the top layer of that menu changes colour to blue for easy identification of selected menu items.



Press the  button once completed to save changes.

## Bulk Print Staff Cards

Admin > Security > Bulk Print Staff Cards



As a new staff member is added to the system their name is included in the bulk card print system.

Tick the box to select a staff member for printing. Once the card is printed their name is removed from the list.

Alternatively a staff member can be added to the list by using the Add feature.

The card layout for the staff card is defined in the Site > Site Setup > Cards screen.

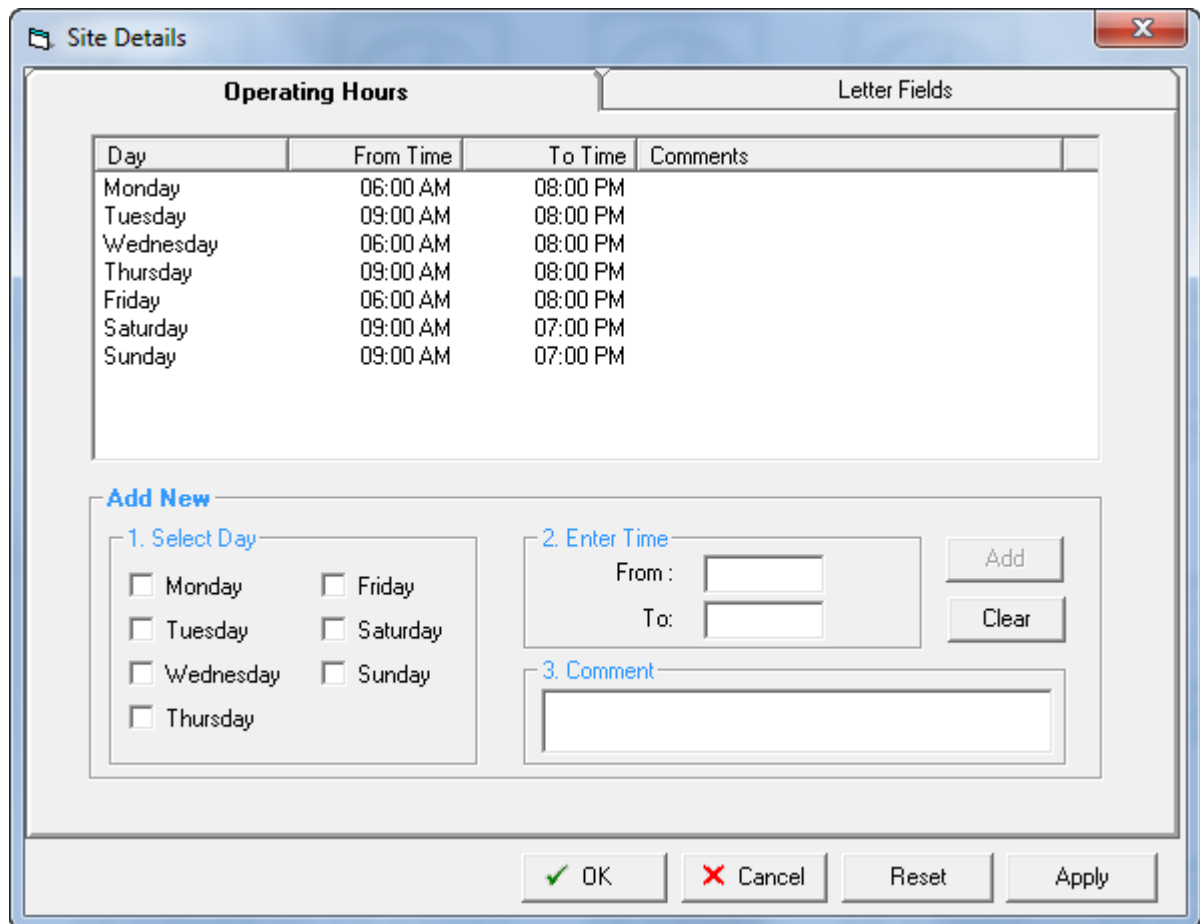
**Admin > Site**

**Site Details**

Admin > Site > Site Details

Admin > Site > Site Details > Operating Hours

Enter the operating hours of the facility.



The screenshot shows a software window titled "Site Details" with a sub-tab "Operating Hours". The window contains a table of operating hours for each day of the week. Below the table is an "Add New" section with three steps: 1. Select Day (checkboxes for Monday through Sunday), 2. Enter Time (input fields for "From:" and "To:" with "Add" and "Clear" buttons), and 3. Comment (a text input field). At the bottom of the window are buttons for "OK", "Cancel", "Reset", and "Apply".

Day	From Time	To Time	Comments
Monday	06:00 AM	08:00 PM	
Tuesday	09:00 AM	08:00 PM	
Wednesday	06:00 AM	08:00 PM	
Thursday	09:00 AM	08:00 PM	
Friday	06:00 AM	08:00 PM	
Saturday	09:00 AM	07:00 PM	
Sunday	09:00 AM	07:00 PM	

**Add New**

1. Select Day

Monday     Friday

Tuesday     Saturday

Wednesday     Sunday

Thursday

2. Enter Time

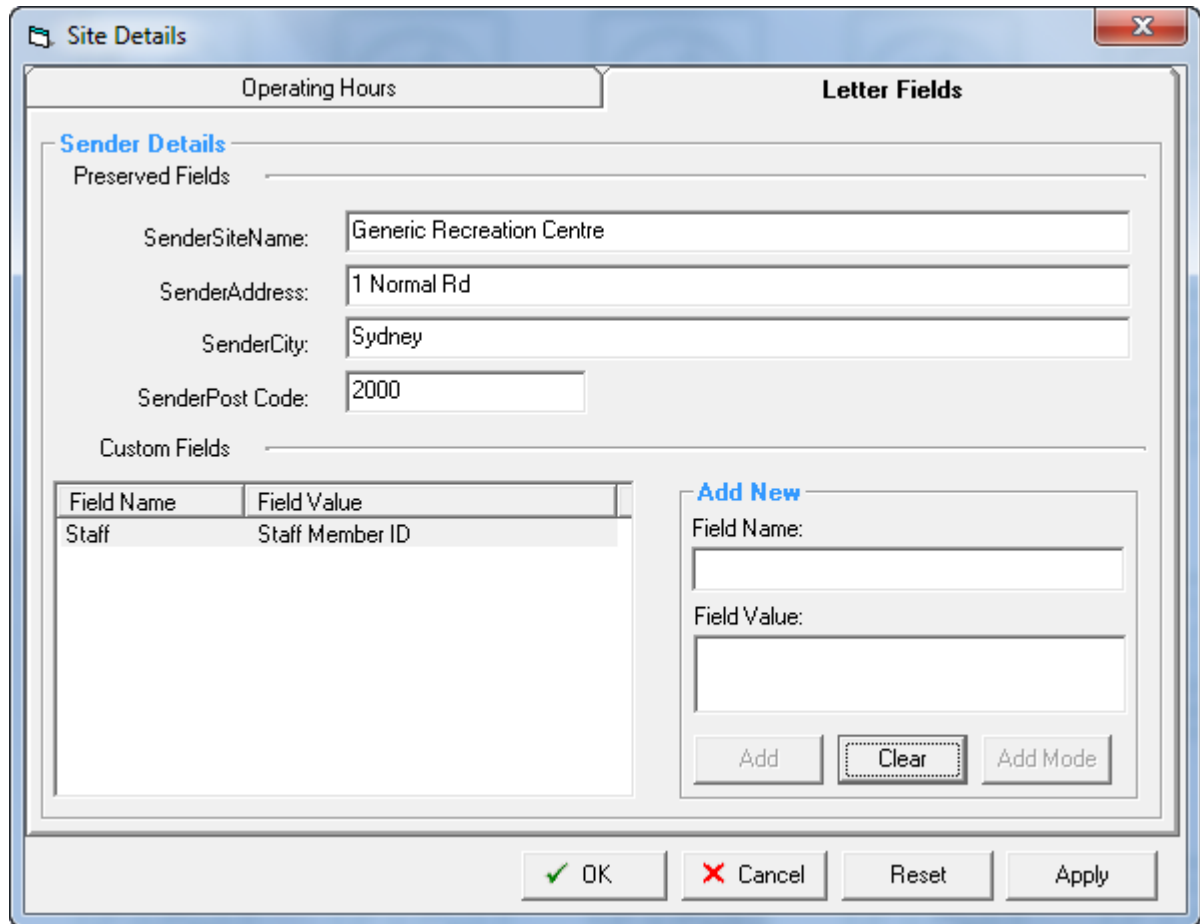
From :

To:

3. Comment

Admin > Site > Site Details > Letter Fields

This screen enables personalisation of fields which can be inserted into to the standard Links Templates and used for various letters.



**Site Details**

Operating Hours | **Letter Fields**

**Sender Details**

Preserved Fields

SenderSiteName: Generic Recreation Centre

SenderAddress: 1 Normal Rd

SenderCity: Sydney

SenderPost Code: 2000

Custom Fields

Field Name	Field Value
Staff	Staff Member ID

**Add New**

Field Name:

Field Value:

Add Clear Add Mode

OK Cancel Reset Apply

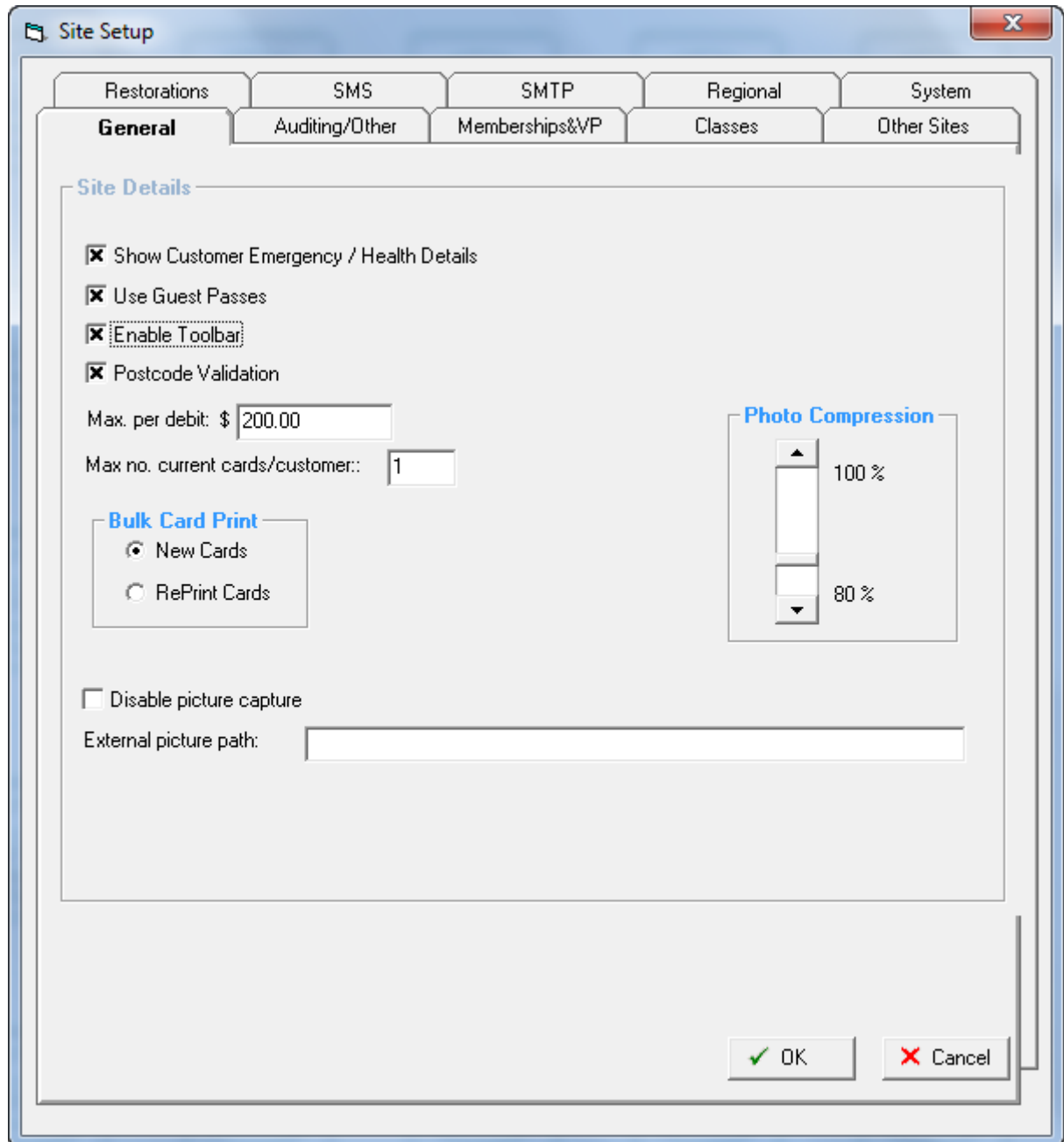
Sender Details      The name and address of the facility

Custom Fields      Type in a common field name and field value that needs to be included in the letter templates

## Site Setup

Admin > Site > Site Setup

Admin > Site > Site Setup > General



Show Customer Emergency / Health Details

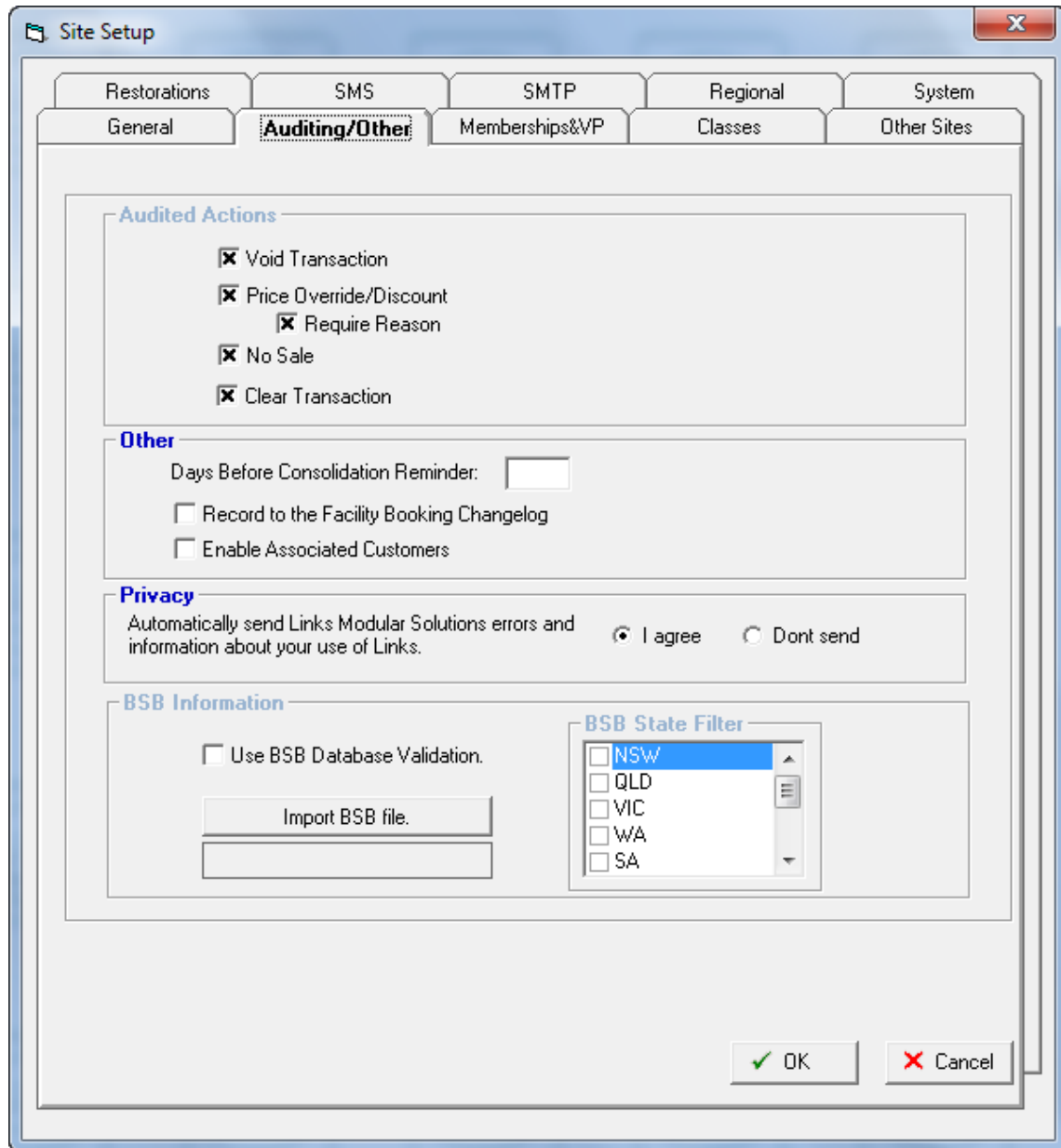
Allows Emergency Contact details and Health information to be recorded in the Customer Screen

Use Guest Passes

Select this box to activate the guest pass tab in the Prospects screen



Enable Toolbar	Toolbar button is on the Links Main Menu screen. When opened, the Toolbar is displayed on top of other programs and documents and facilitates quick access to Links modules
Post Code Validation	When you enter a suburb it will type with predictive text. If more than one postcode exists for that suburb/city, the user will then be able to select a range of codes from the database
Max per debit	Defines the maximum payment that will be processed by Direct Debit
Max no current cards /customer	Limits the number of cards allocated to a Customer
Bulk Card Print	New Cards/Re Print Cards
Disable picture capture	Only required on advice from Links Support
External picture path	The path where photos from previous software may be stored
Photo Compression	The slide bar dictates the photo quality and has a default setting of 80%. The higher the number, the better the photo quality however the larger the storage space required to save the file and will be slower to display



The screenshot shows the 'Site Setup' window with the 'Auditing/Other' tab selected. The window contains several sections:

- Audited Actions:** A list of actions with checkboxes:
  - Void Transaction
  - Price Override/Discount
    - Require Reason
  - No Sale
  - Clear Transaction
- Other:**
  - Days Before Consolidation Reminder:
  - Record to the Facility Booking Changelog
  - Enable Associated Customers
- Privacy:**
  - Automatically send Links Modular Solutions errors and information about your use of Links.  I agree  Dont send
- BSB Information:**
  - Use BSB Database Validation.
  - Import BSB file.
  - BSB State Filter:**
    - NSW
    - QLD
    - VIC
    - WA
    - SA

At the bottom right, there are 'OK' and 'Cancel' buttons.

### Audited Actions

A log of the following functions can be reviewed using the Links Audit Log. For each entry in the log, the Staff Id, Reason entered and Price (when relevant) is included. See Admin > File > Audit log.

- Void Transaction
- Price Override/Discount
  - Require Reason
- No Sale
- Clear Transaction

Other

Days before Consolidation Reminder      After the number of days specified, the user will be reminded to consolidate all current transactions. The consolidation process places all current transactions into a history status where they can no longer be modified

Record to the Facility Booking Change log      Any changes to Facility bookings are logged and can be reviewed in the Facility booking screen under View Change Log

Enable Associated Customers      Only required on advice from Links Support

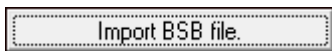
Customers

Privacy

Information provided to Links Modular Solutions regarding errors and your use of Links assists in the further development of the program

BSB Information

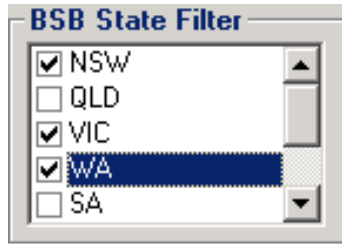
Use BSB Database Validation      You have the option of inserting a BSB database into your system to help validate BSB numbers entered. A particularly useful tool if using the Direct Debiting Process for customers whose fees/charges are to be debited out of Bank Accounts, see Admin> Direct Debit. Click in the box to activate this function



To import the BSB database file, click on this field and browse to find the file. Once you have located the file, double click on the file name

This file will then commence inserting the BSB file to be part of Links added functionalities.

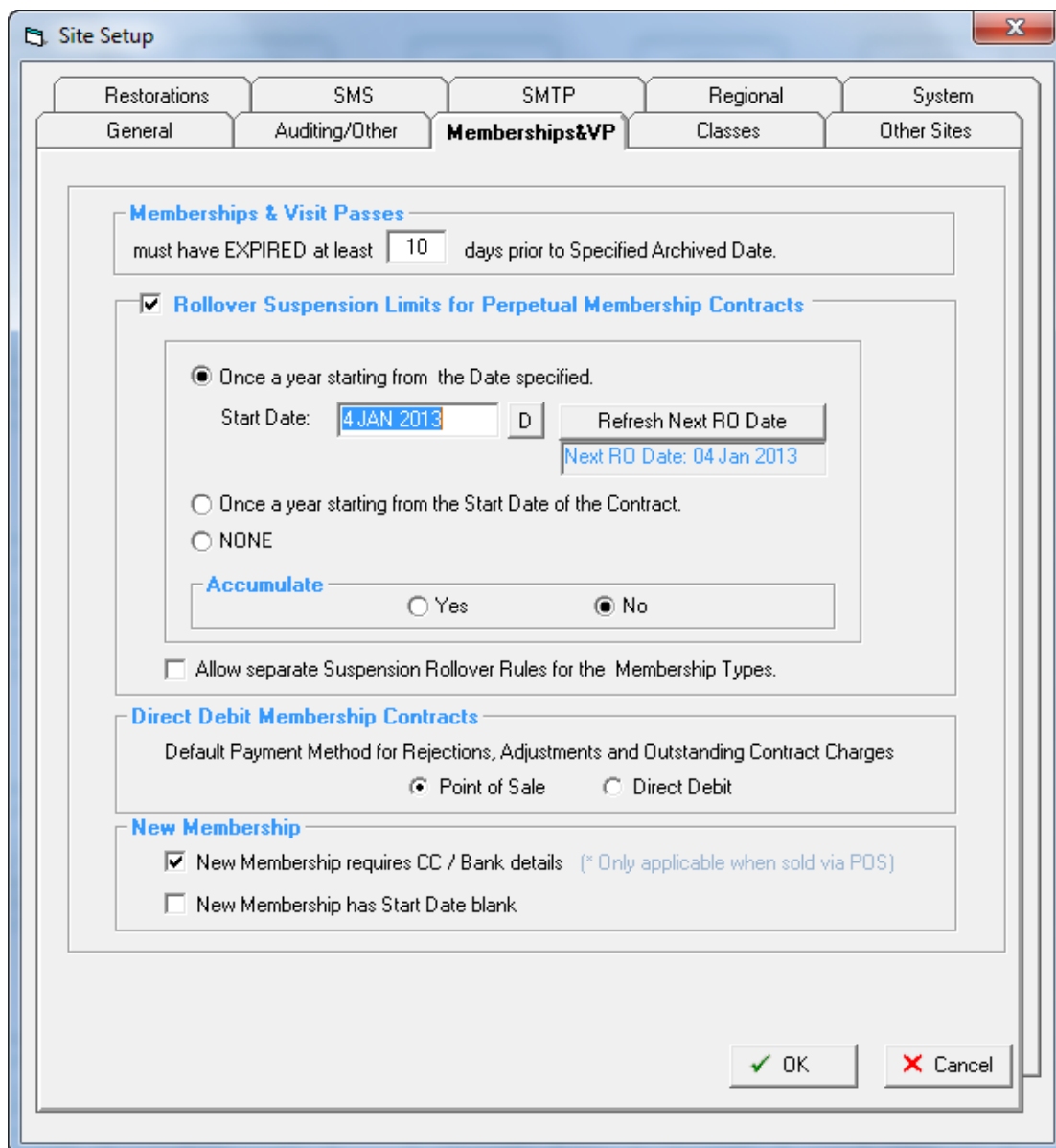
Once the BSB file has been inserted, the BSB State Filter will display each individual state, giving the site the option of validating all BSB's throughout Australia or just selected states. To nominate the states to filter, click in the box alongside the preferred State, more than one State can be chosen. Deciding to filter States will depend on your clientele. If your site runs a direct debit process then it would be advisable to nominate this option, as members may have accounts that have been set up in other states.



### Obtaining File

To obtain a copy of the BSB file, you will need to purchase the file from *Australian Payments Clearing Association Limited (APCA)* on 02 9221 8950

Admin > Site > Site Setup > Memberships&VP



## Membership & Visit Passes

Must have EXPIRED... Used when archiving Memberships and Visit Passes. In the example above all expired memberships which have been expired at least 10 days prior to the Specified Archived Date will be archived

### Rollover Suspension Limits for Perpetual Membership Contracts

This area defines the rules on how suspensions will be treated for perpetual memberships. Select the box to initiate the rules option.

Once a year from specified date This feature allows for membership contracts to have their suspension limit re-topped up to the full quota again as of the date entered



The date displayed in this pane is automatically calculated from the date entered in Start Date. This will need to be manually updated come the anniversary by clicking this button

Once a year from start date of contract This feature allows for membership contracts to have their suspension limit re-topped up to the full quota again as of the 12 month anniversary date of the start of the contract

None No rollover rules

Accumulate  
(not recommended) Unused suspension time will be added to the renewed allocation resulting in higher than renewal allocation limits for some customers

### Direct Debit Membership Contracts

Select whether Direct Debit rejections, adjustments and Outstanding Contract Charges be paid through POS or applied to the next Direct Debit run.

If POS is selected Any outstanding amount, either entered because of a payment rejection or account adjustment, will be identified for payment through Point of Sale, i.e. when the member visits an error will be produced and a message for payment will be displayed, and be processed through a Point of Sale transaction. Any suspension credit or debit will be applied to the next debit run/s.

If DD is selected Any outstanding amount, either entered because of a payment rejection, account adjustment or suspension, will be applied to the next debit run or runs.

## New Membership

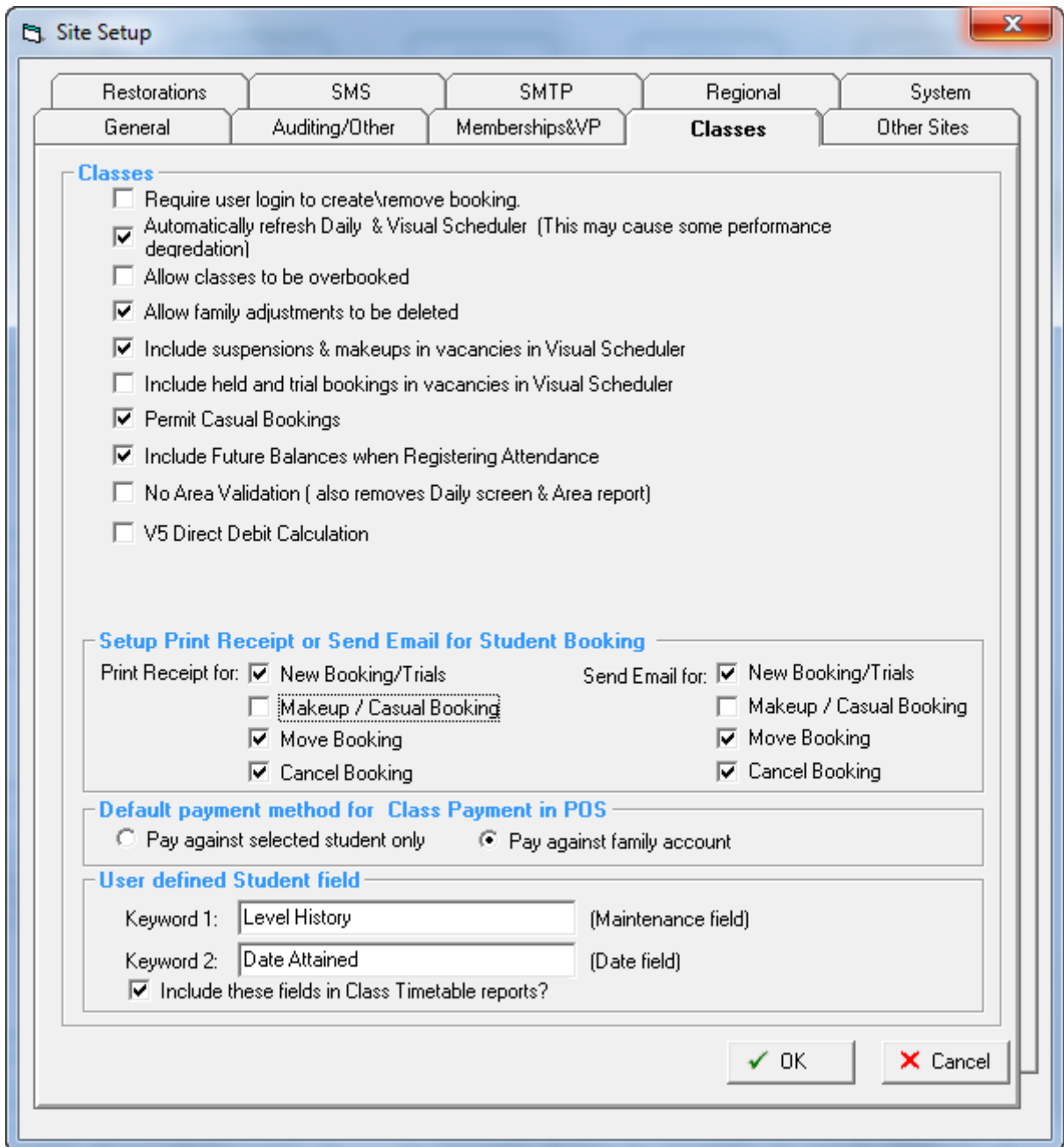
New Membership requires  
CC / Bank details

Select if you wish Credit card and Bank details to be a mandatory field when processing a New Membership through POS

New Membership has Start  
Date Blank

When selected, the Start Date for memberships will be blank rather than defaulting to the date of purchase

Admin > Site > Site Setup > Classes



**Site Setup**

Restorations    SMS    SMTP    Regional    System

General    Auditing/Other    Memberships&VP    **Classes**    Other Sites

**Classes**

- Require user login to create\remove booking.
- Automatically refresh Daily & Visual Scheduler (This may cause some performance degradation)
- Allow classes to be overbooked
- Allow family adjustments to be deleted
- Include suspensions & makeups in vacancies in Visual Scheduler
- Include held and trial bookings in vacancies in Visual Scheduler
- Permit Casual Bookings
- Include Future Balances when Registering Attendance
- No Area Validation ( also removes Daily screen & Area report)
- V5 Direct Debit Calculation

**Setup Print Receipt or Send Email for Student Booking**

Print Receipt for:	<input checked="" type="checkbox"/> New Booking/Trials	Send Email for:	<input checked="" type="checkbox"/> New Booking/Trials
	<input type="checkbox"/> Makeup / Casual Booking		<input type="checkbox"/> Makeup / Casual Booking
	<input checked="" type="checkbox"/> Move Booking		<input checked="" type="checkbox"/> Move Booking
	<input checked="" type="checkbox"/> Cancel Booking		<input checked="" type="checkbox"/> Cancel Booking

**Default payment method for Class Payment in POS**

Pay against selected student only     Pay against family account

**User defined Student field**

Keyword 1:  (Maintenance field)

Keyword 2:  (Date field)

Include these fields in Class Timetable reports?

OK    Cancel

Require user login to create\remove booking	Requires staff to enter ID when a booking is made or cancelled
Auto refresh Daily & Visual Scheduler	Automatically refreshes the visual scheduler
Allow classes to be overbooked	All classes can be overbooked regardless of the class limit
Allow family adjustments to be deleted	Any family adjustment which has been entered using the family adjustment screen can be deleted
Include suspensions & makeup's in vacancies in Visual Scheduler	Treats suspensions and make up bookings as taking up a vacancy when displayed in the visual scheduler
Include held and trial bookings in vacancies in Visual Scheduler	Treats held and trial bookings as taking up a vacancy when displayed in the visual scheduler
Permit Casual Bookings	Allows Casual student bookings for Standard Class Types only.  This does not include Holiday program or Squad Class Types. A Casual booking only exists for the one class only and is ignored by the direct debit process.
Include future balances when Registering Attendance	Allows next term balance to be shown and available for payment when registering attendance
No Area Validation	Select if more than one Class can be created utilising the same Area at a certain day and time
V5 Direct Debit Calculation	Only required on advice from Links Support
Setup Print Receipt or Send Email for student booking	
When selected, a Receipt will be printed and/or Email sent showing booking details for the following functions	
	<ul style="list-style-type: none"> <li>• New bookings/Trials</li> <li>• Makeup/Casual Booking</li> <li>• Move Booking</li> </ul>

- Cancel Booking

Note: Receipt printer needs to be attached and Can Email selected in Admin> Setup PC for these functions

Default payment method for Class Payment in POS

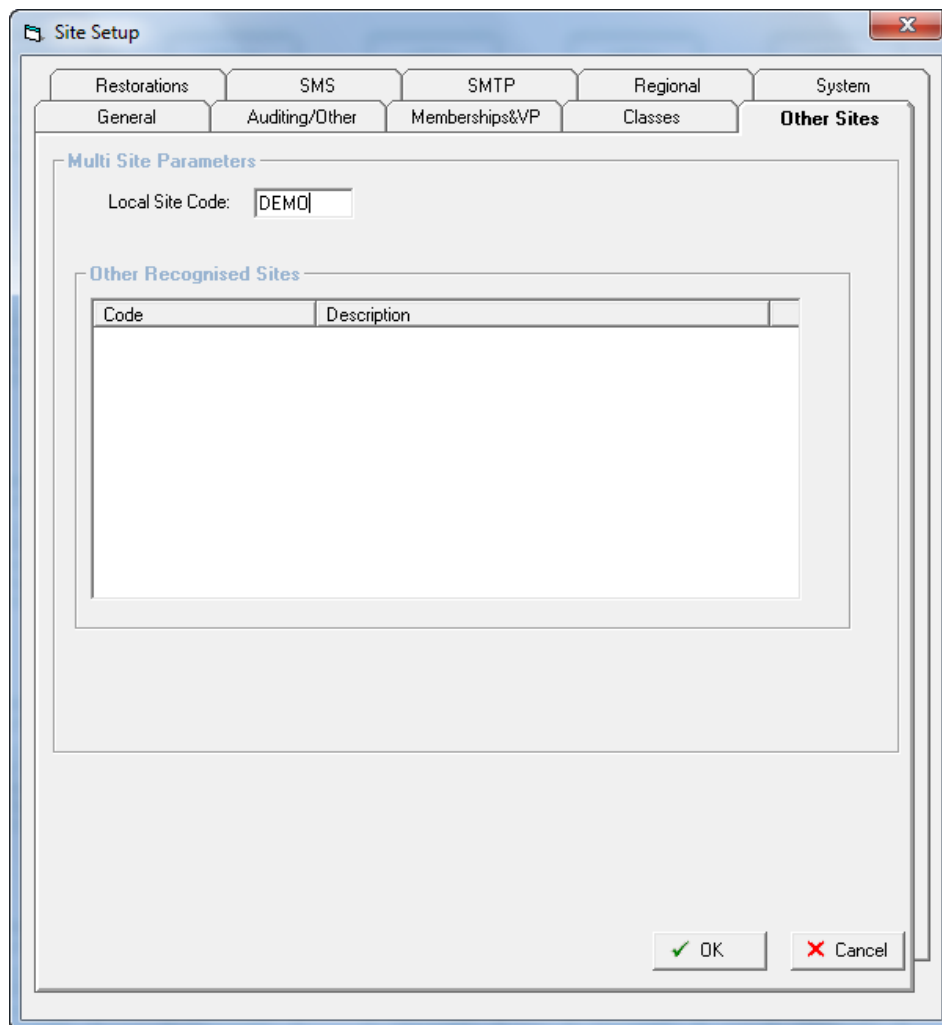
Pay against selected student only                      When using the Class Payment screen in POS, the default setting will be by "Student"

Pay against family account                      When using the Class Payment screen in POS, the default setting will be by "Family"

User defined Student field

These keywords allow for customised field in the User Defined tab in the Student Details screen. The fields can be included in Class Timetable reports.

*Admin > Site > Site Setup > Other Sites*





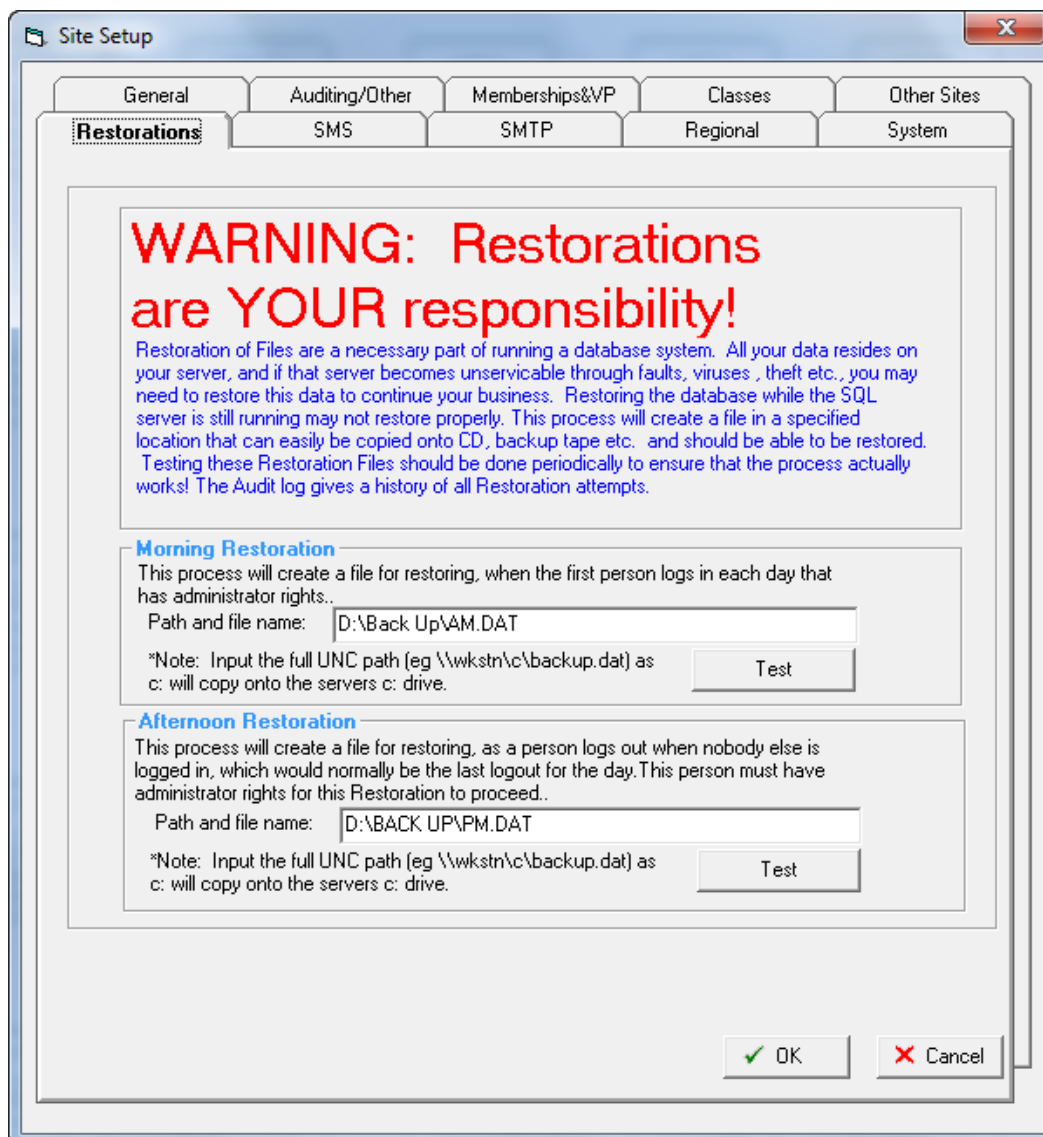
## Multi Site Parameters

Links has the ability to register visits from customers who belong to another facility. This makes it possible to offer reciprocal rights to customers by linking one or more facilities and sharing database details.

There are several different ways of performing this function, centralised, replication, direct access and each requires different settings within this screen.

This screen should only be updated by Links Modular Solutions Staff and settings should not be altered unless directed by Links Modular Solutions.

*Admin > Site > Site Setup > Restorations*



**WARNING: Restorations are YOUR responsibility!**

Restoration of Files are a necessary part of running a database system. All your data resides on your server, and if that server becomes unservicable through faults, viruses, theft etc., you may need to restore this data to continue your business. Restoring the database while the SQL server is still running may not restore properly. This process will create a file in a specified location that can easily be copied onto CD, backup tape etc. and should be able to be restored. Testing these Restoration Files should be done periodically to ensure that the process actually works! The Audit log gives a history of all Restoration attempts.

**Morning Restoration**  
 This process will create a file for restoring, when the first person logs in each day that has administrator rights..

Path and file name:

\*Note: Input the full UNC path (eg \\wkstrn\c\backup.dat) as c: will copy onto the servers c: drive.

**Afternoon Restoration**  
 This process will create a file for restoring, as a person logs out when nobody else is logged in, which would normally be the last logout for the day. This person must have administrator rights for this Restoration to proceed..

Path and file name:

\*Note: Input the full UNC path (eg \\wkstrn\c\backup.dat) as c: will copy onto the servers c: drive.

This screen allows for a make up to be made of the database while the system is in use and in a format that makes it easy to restore should the need arise.

This backup process will be performed each day when the first person logs into Links.

A valid path and file name must stipulate where the file is to be backed up to. This file name is BACKUP.DAT. All files saved must have a .DAT extension.

Press the **Test** button to confirm that the path name and file name is valid.

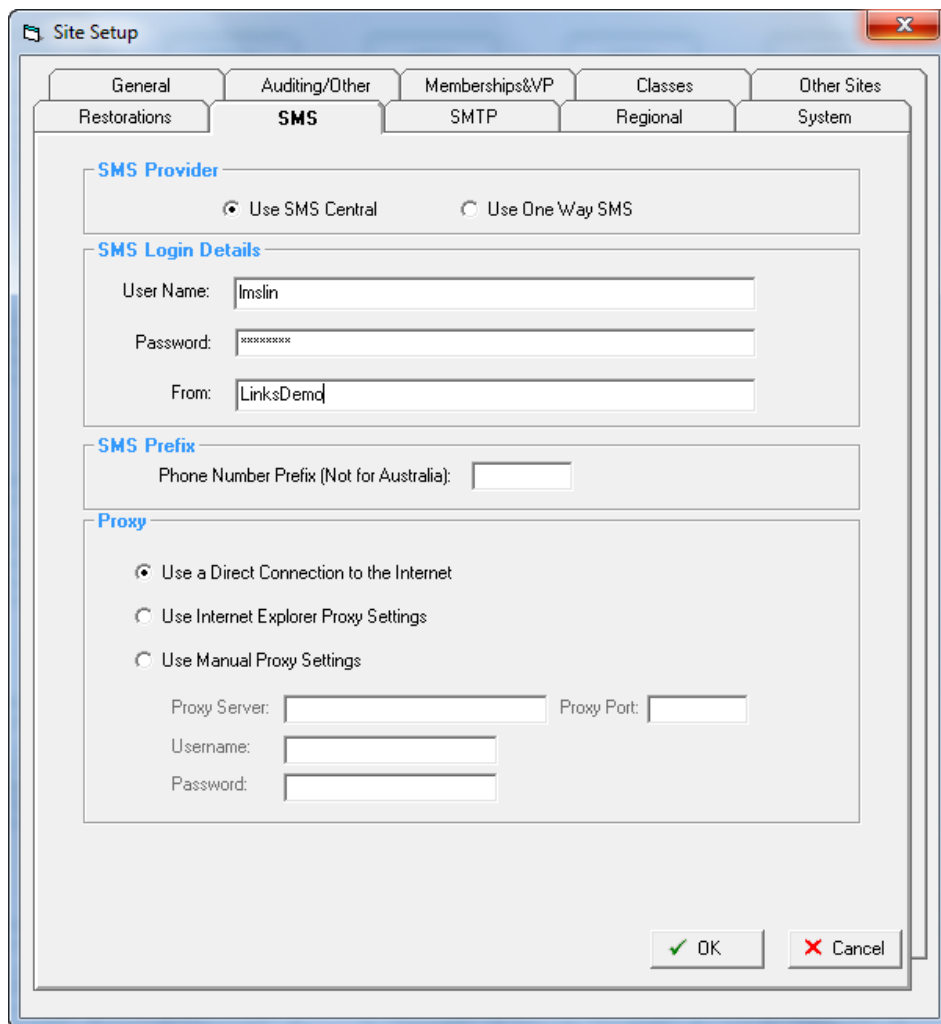
The above example shows this database will be backing up to the D drive to a subfolder titled Back Up.

Note: A backup can be produced at anytime by pressing the **Test** button.

It is a facilities responsibility to include this backup file into its standard backup routine.

*Admin > Site > Site Setup > SMS*

This SMS functionality is setup by Links Support. Please contact Links support if required.



**Site Setup**

General Auditing/Other Memberships&VP Classes Other Sites  
Restorations **SMS** SMTP Regional System

**SMS Provider**

Use SMS Central  Use One Way SMS

**SMS Login Details**

User Name:

Password:

From:

**SMS Prefix**

Phone Number Prefix (Not for Australia):

**Proxy**

Use a Direct Connection to the Internet  
 Use Internet Explorer Proxy Settings  
 Use Manual Proxy Settings

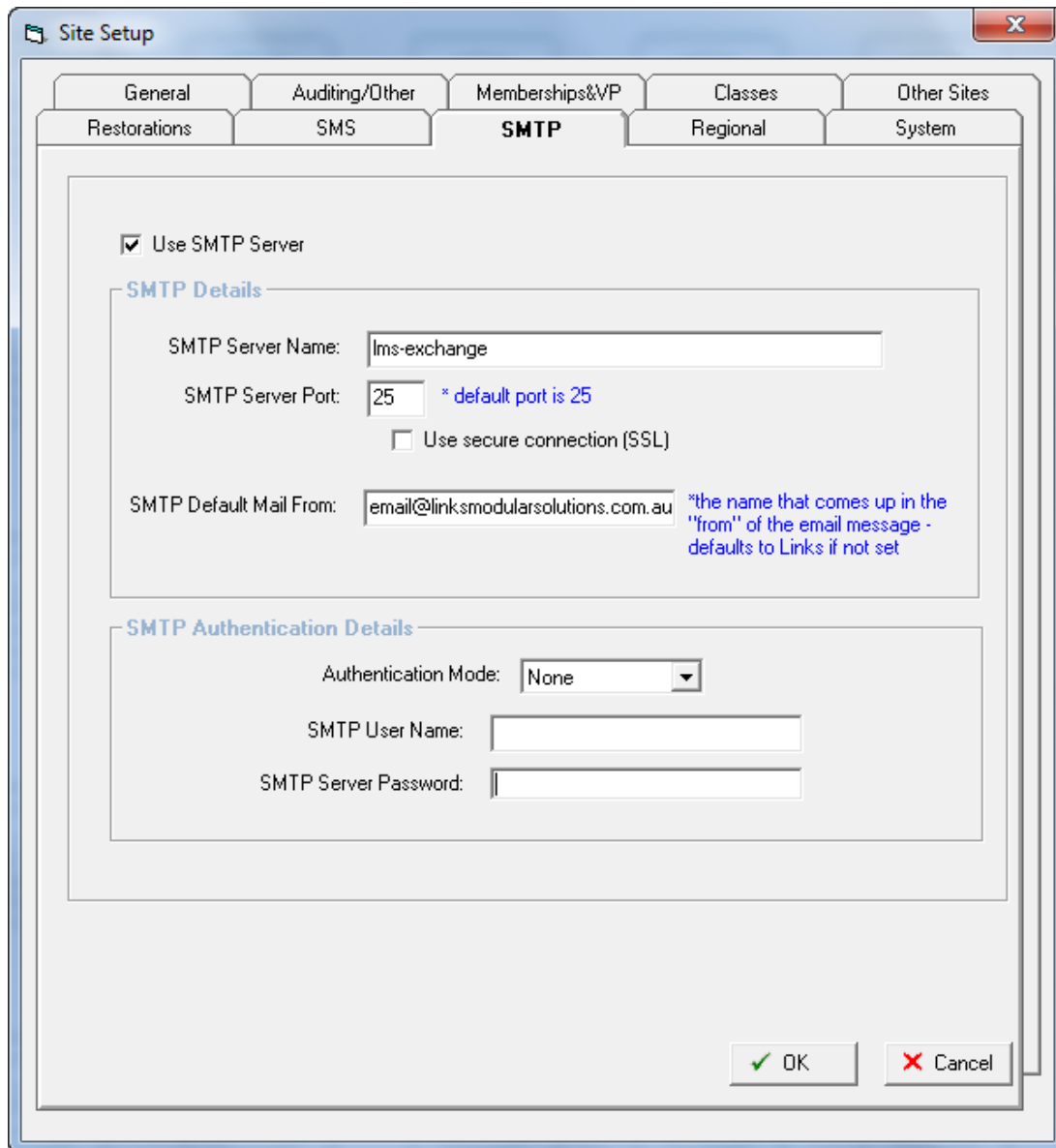
Proxy Server:  Proxy Port:

Username:

Password:

Admin > Site > Site Setup > SMTP

SMTP mail details are entered here. Please contact Links Support if required.



The screenshot shows a 'Site Setup' dialog box with the 'SMTP' tab selected. The 'Use SMTP Server' checkbox is checked. The 'SMTP Details' section contains the following fields: 'SMTP Server Name' (lms-exchange), 'SMTP Server Port' (25, with a note '\* default port is 25'), and 'Use secure connection (SSL)' (unchecked). The 'SMTP Default Mail From' field contains 'email@linksmodularsolutions.com.au' with a note: '\*the name that comes up in the "from" of the email message - defaults to Links if not set'. The 'SMTP Authentication Details' section contains: 'Authentication Mode' (None), 'SMTP User Name' (empty), and 'SMTP Server Password' (empty). 'OK' and 'Cancel' buttons are at the bottom right.

General	Auditing/Other	Memberships&VP	Classes	Other Sites
Restorations	SMS	<b>SMTP</b>	Regional	System

Use SMTP Server

**SMTP Details**

SMTP Server Name:

SMTP Server Port:  \* default port is 25

Use secure connection (SSL)

SMTP Default Mail From:  \*the name that comes up in the "from" of the email message - defaults to Links if not set

**SMTP Authentication Details**

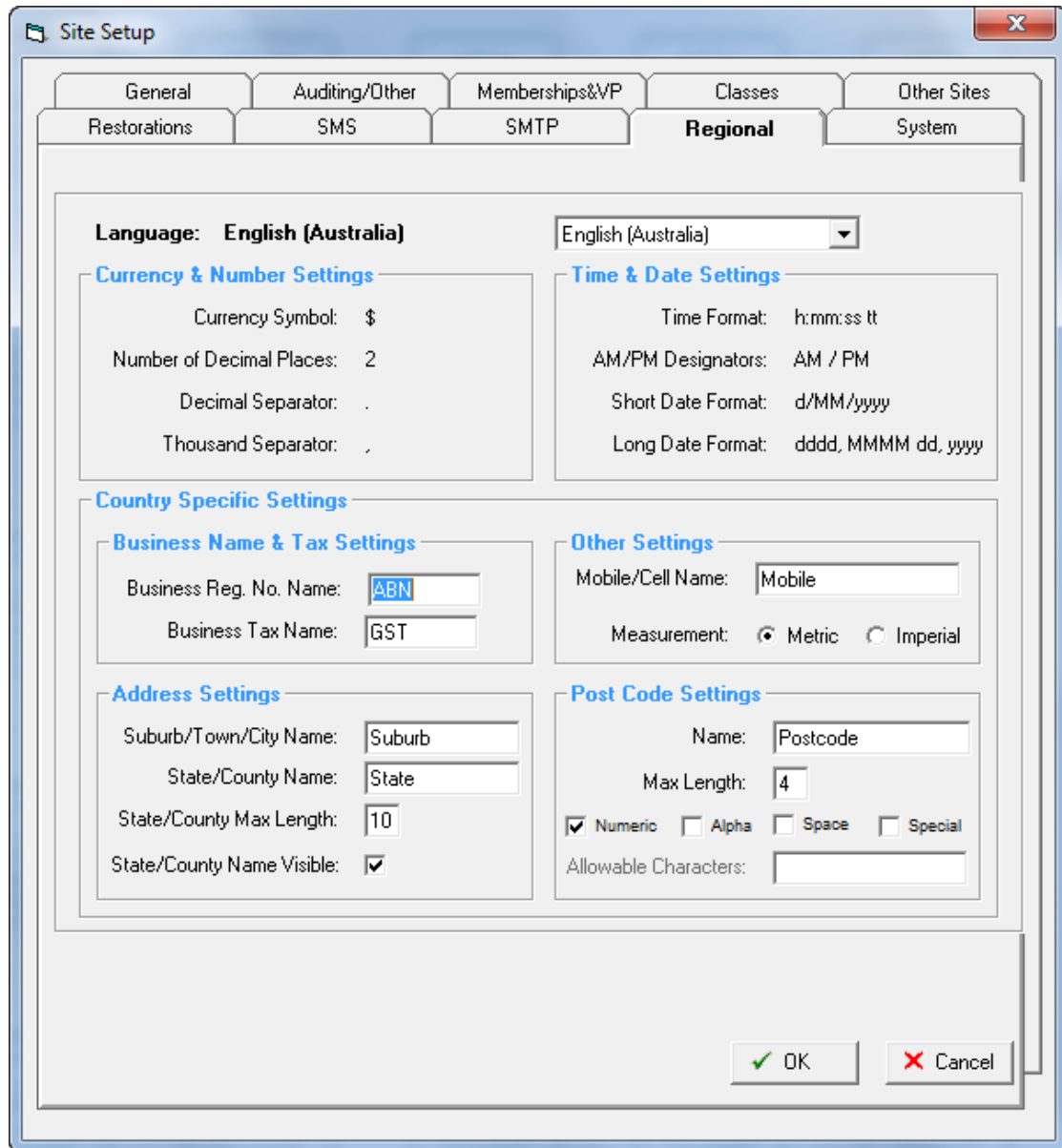
Authentication Mode:

SMTP User Name:

SMTP Server Password:

Admin > Site > Site Setup > Regional

The Regional Tab enables the Links Modular Solutions team to customise the system settings to suit the site location.



**Site Setup**

General   Auditing/Other   Memberships&VP   Classes   Other Sites  
 Restorations   SMS   SMTP   **Regional**   System

**Language:** English (Australia)   English (Australia)

**Currency & Number Settings**

Currency Symbol: \$  
 Number of Decimal Places: 2  
 Decimal Separator: .  
 Thousand Separator: ,

**Time & Date Settings**

Time Format: h:mm:ss tt  
 AM/PM Designators: AM / PM  
 Short Date Format: d/MM/yyyy  
 Long Date Format: dddd, MMMM dd, yyyy

**Country Specific Settings**

**Business Name & Tax Settings**

Business Reg. No. Name: ABN  
 Business Tax Name: GST

**Other Settings**

Mobile/Cell Name: Mobile  
 Measurement:  Metric  Imperial

**Address Settings**

Suburb/Town/City Name: Suburb  
 State/County Name: State  
 State/County Max Length: 10  
 State/County Name Visible:

**Post Code Settings**

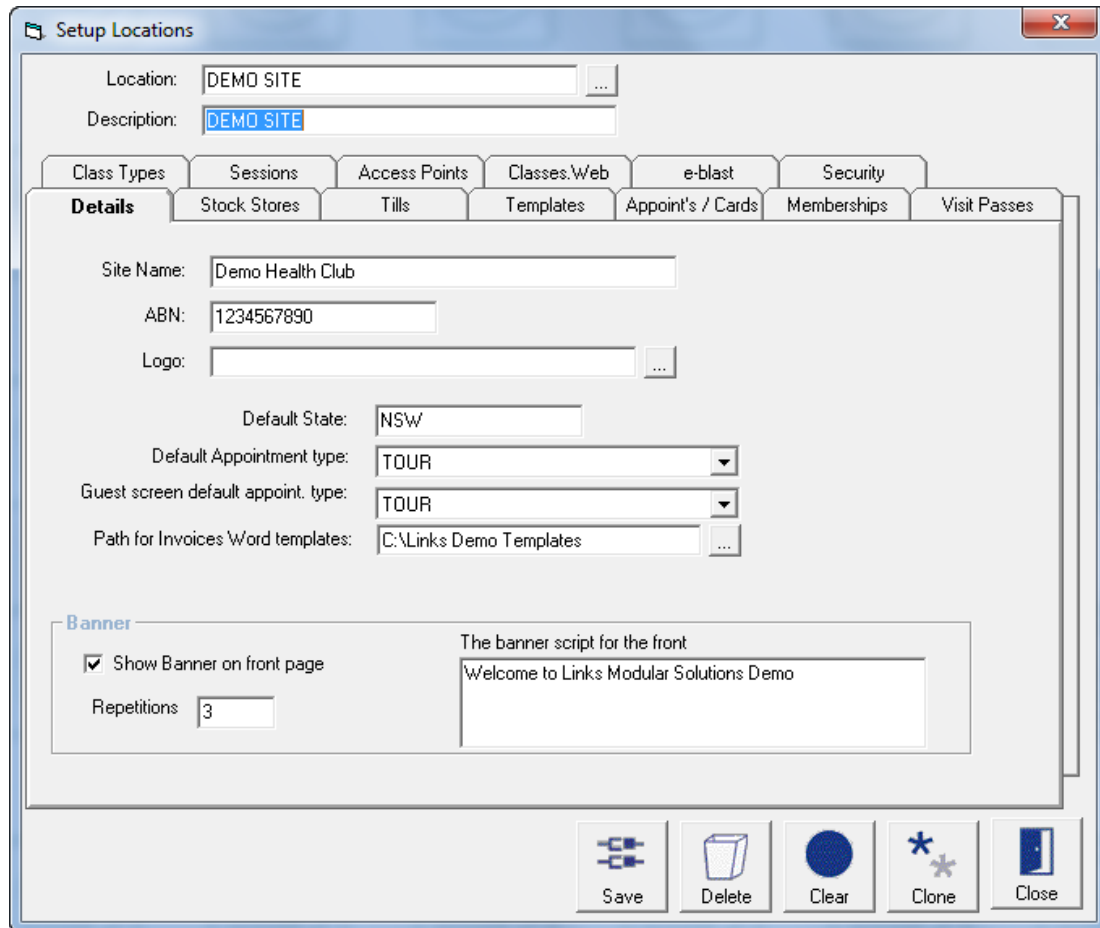
Name: Postcode  
 Max Length: 4  
 Numeric  Alpha  Space  Special  
 Allowable Characters:

OK   Cancel

## Setup Locations/Other Site Parameters

Admin > Site > Setup Locations/Other Site Parameters

Admin > Site > Setup Locations/Other Site Parameters > Details



The screenshot shows the 'Setup Locations' application window with the 'Details' tab selected. The 'Location' field is set to 'DEMO SITE' and the 'Description' is also 'DEMO SITE'. The 'Details' section includes fields for 'Site Name' (Demo Health Club), 'ABN' (1234567890), 'Logo', 'Default State' (NSW), 'Default Appointment type' (TOUR), 'Guest screen default appoint. type' (TOUR), and 'Path for Invoices Word templates' (C:\Links Demo Templates). A 'Banner' section is also visible, with a checked box for 'Show Banner on front page', 'Repetitions' set to 3, and a text area containing 'Welcome to Links Modular Solutions Demo'. At the bottom, there are buttons for 'Save', 'Delete', 'Clear', 'Clone', and 'Close'.

Site Name	Enter the name of the centre
ABN	Type in the company's ABN
Logo	A logo file path can be entered here for use on invoices
Default State	Enter the state which will be the default when typing all addresses
Default Appointment type	The appointment type that you wish to appear first upon opening of the appointment screen in the POS Module
Guest screen default appointment type	When making an appointment from the customer details screen, you can select the default to be different to that of the POS Module

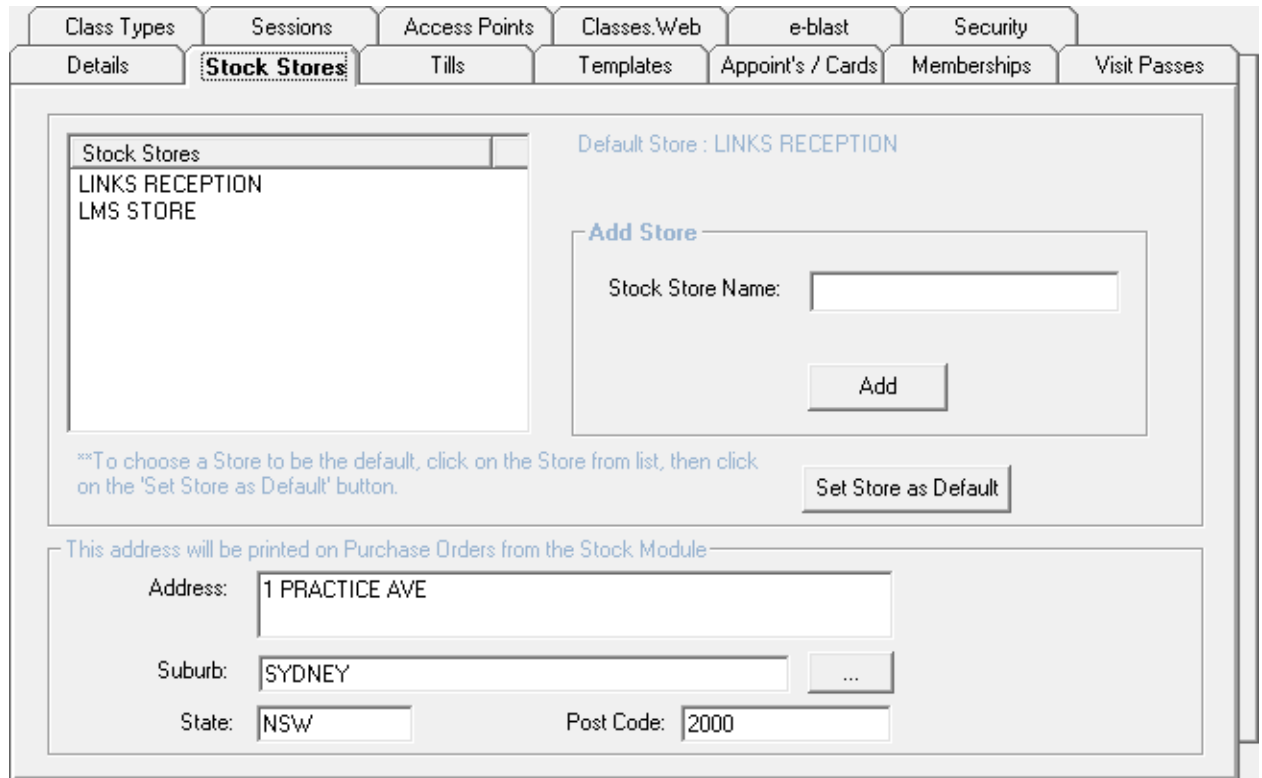
Path for Invoices Word templates

Enter the path to the folder for templates for invoices

Banner

Type a banner to display on the Links Front menu screen and specify the number of repetitions

*Admin > Site > Setup Locations/Other Site Parameters > Stock Stores*



Stock Stores

Add Stock Store Names. Stock Stores are any location where stock will be held including store rooms, shop floor, reception etc.

Address for Purchase Orders

Enter an address to be printed on purchase orders from the Stock Module.

Admin > Site > Setup Locations/Other Site Parameters > Tills

Listed are the Tills that are setup for this location.

Tills	
Till	Store
ADMIN	LINKS RECEPTION
TILL1	LINKS RECEPTION
TILL2	LINKS RECEPTION

**Add Till**

Till:

Store:

**Card Present Transactions**

Provider:

User Name:

Password:

Print Merchant Receipt Copy

Print Signature Line or Merchant Copy

Add Till

Use the  to select a Till

and Store to

Click to add to the list of Tills available for this Location

**Till Setup**

**Available Tills**

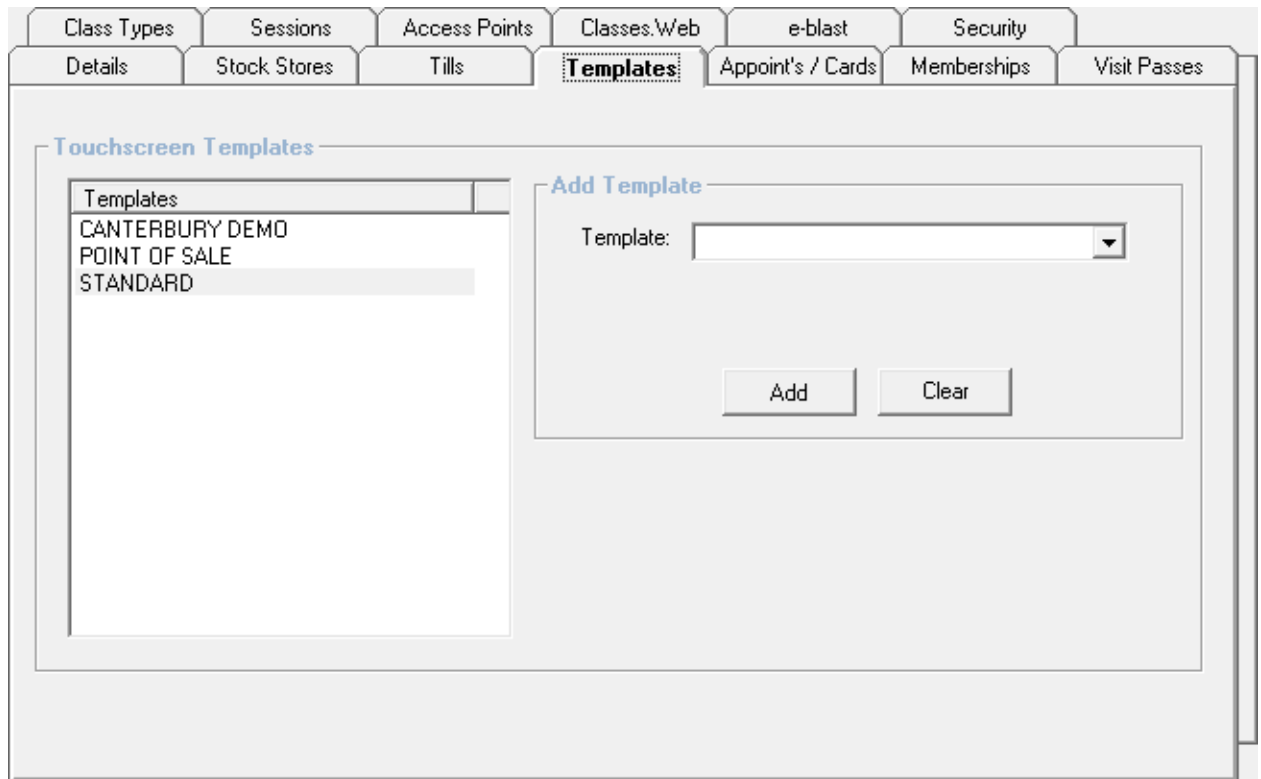
Till Code
ADMIN
ROSE
TILL 1
TILL1
TILL2
TILL3
TILL4

**Add Till**


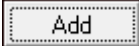
Code:

Admin > Site > Setup Locations/Other Site Parameters > Templates

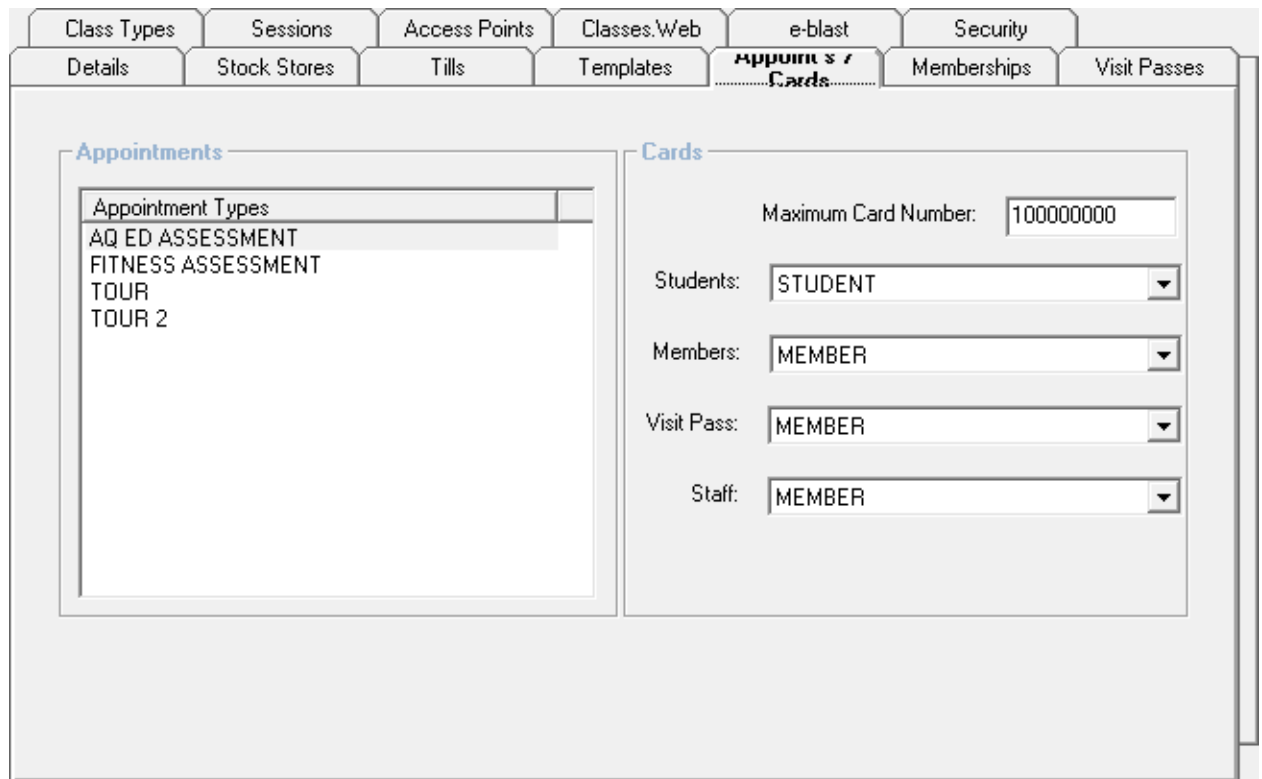
Listed are the Touchscreen Layouts that are setup for this location.



### Add Template

Use the  to select a Touchscreen Template, click  to assign Touchscreen Template to the location.






### Appointments

Listed are the Appointment Types setup for this location.

### Cards

**Maximum Card Number** Set a limit to the card numbers for Students/Members/Visit Passes/Staff

**Students, Members, Visit Passes, Staff** Use the  button to select the Card Layout to use to print Customer Cards for Students/Members/Visit Passes/Staff

Admin > Site > Setup Locations/Other Site Parameters > Memberships

Listed are the Membership Categories that are setup for this location.

Class Types	Sessions	Access Points	Classes.Web	e-blast	Security	
Details	Stock Stores	Tills	Templates	Appoint's / Cards	<b>Memberships</b>	Visit Passes

Membership Categories

- FNDD
- FORTNIGHT
- MONTH
- TERM
- TERMDD

Admin > Site > Setup Locations/Other Site Parameters > Visit Passes

Listed are the Visit Pass Categories that are setup for this location.

Class Types	Sessions	Access Points	Classes.Web	e-blast	Security	
Details	Stock Stores	Tills	Templates	Appoint's / Cards	Memberships	<b>Visit Passes</b>

Visit Pass Categories

AQUATICS
NEW

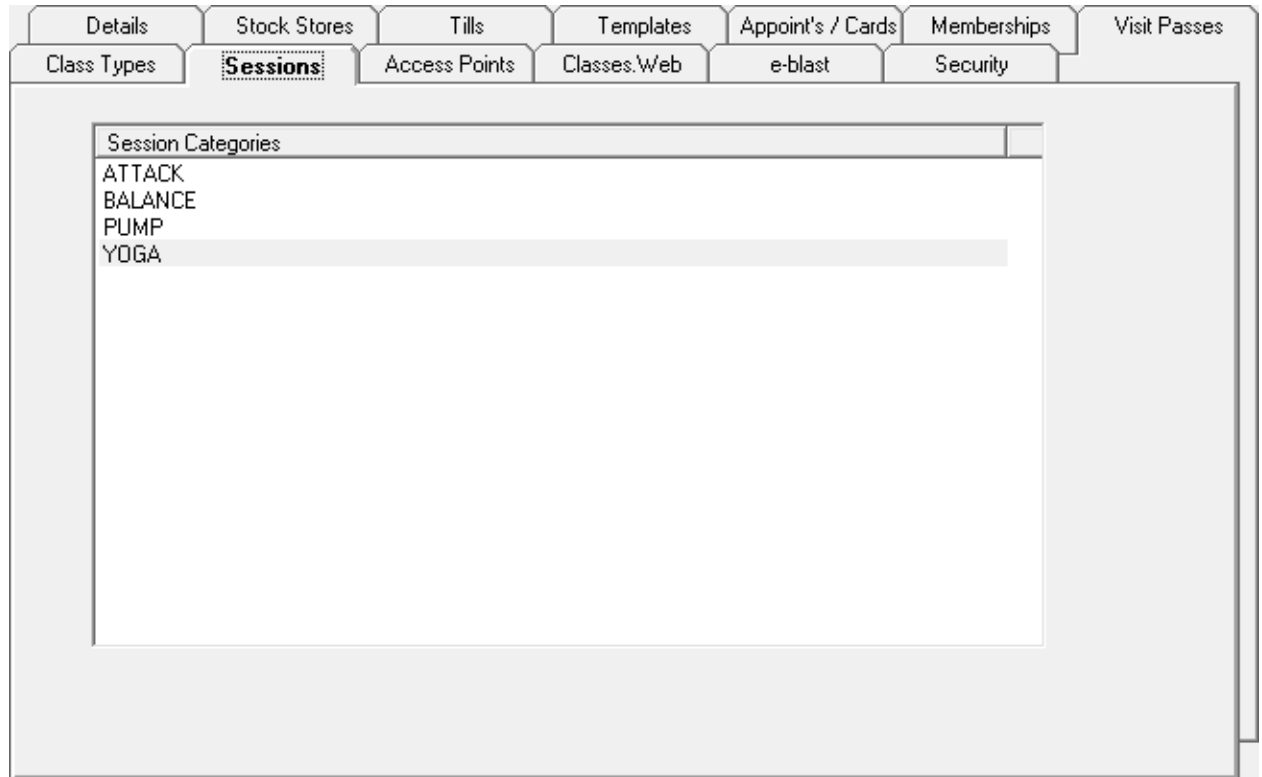
Admin > Site > Setup Locations/Other Site Parameters > Class Types

Listed are the Class Types that are setup for this location

Class Types	
HOLIDA	HOLIDAY PROGRAM
PRESCH	PRESCHOOL CLASSES
SCHOOL	SCHOOL AGED
SQUADS	SQUADS

Admin > Site > Setup Locations/Other Site Parameters > Sessions

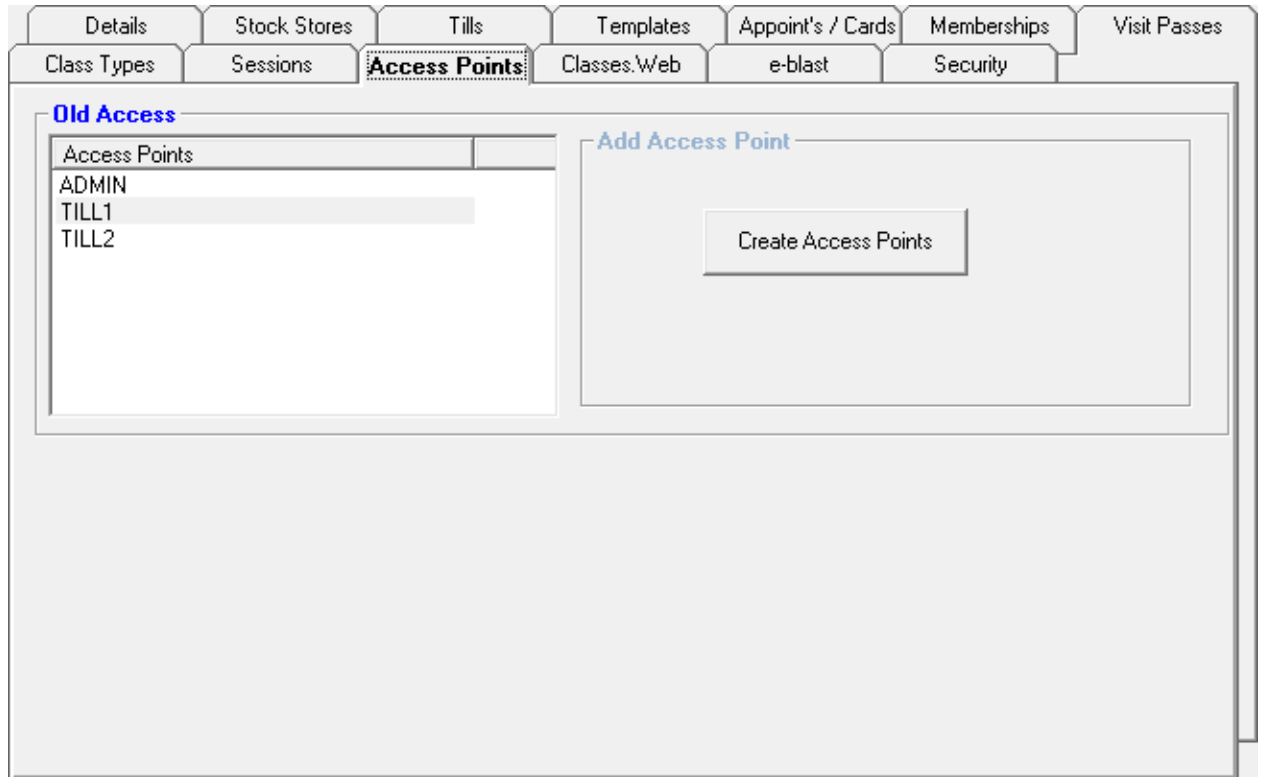
Listed is the Session Categories setup for this location



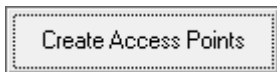
The screenshot shows a web application interface with a top navigation bar containing several tabs: Details, Stock Stores, Tills, Templates, Appoint's / Cards, Memberships, and Visit Passes. Below this is a secondary navigation bar with tabs: Class Types, Sessions (highlighted with a dashed border), Access Points, Classes.Web, e-blast, and Security. The main content area displays a list titled 'Session Categories' with the following items: ATTACK, BALANCE, PUMP, and YOGA. The 'YOGA' item is currently selected and highlighted with a grey background.

Admin > Site > Setup Locations/Other Site Parameters > Access Points

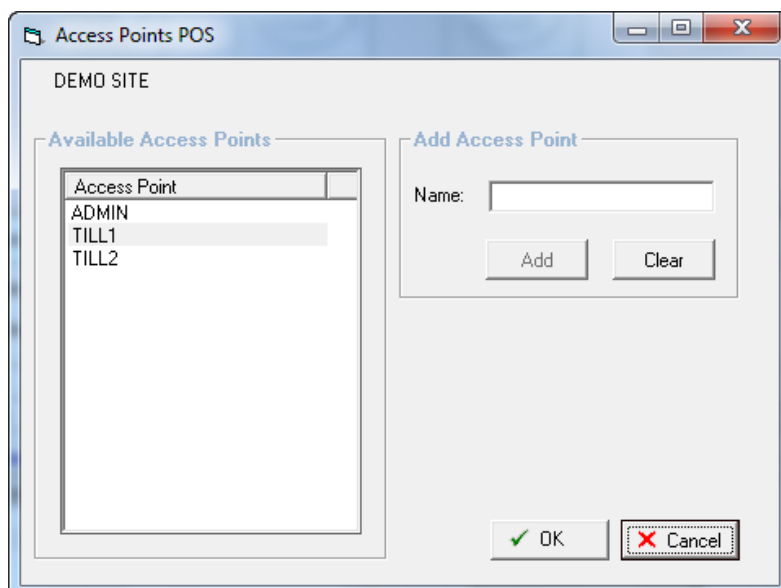
Listed is the Access Points setup for this location



Add Access Point



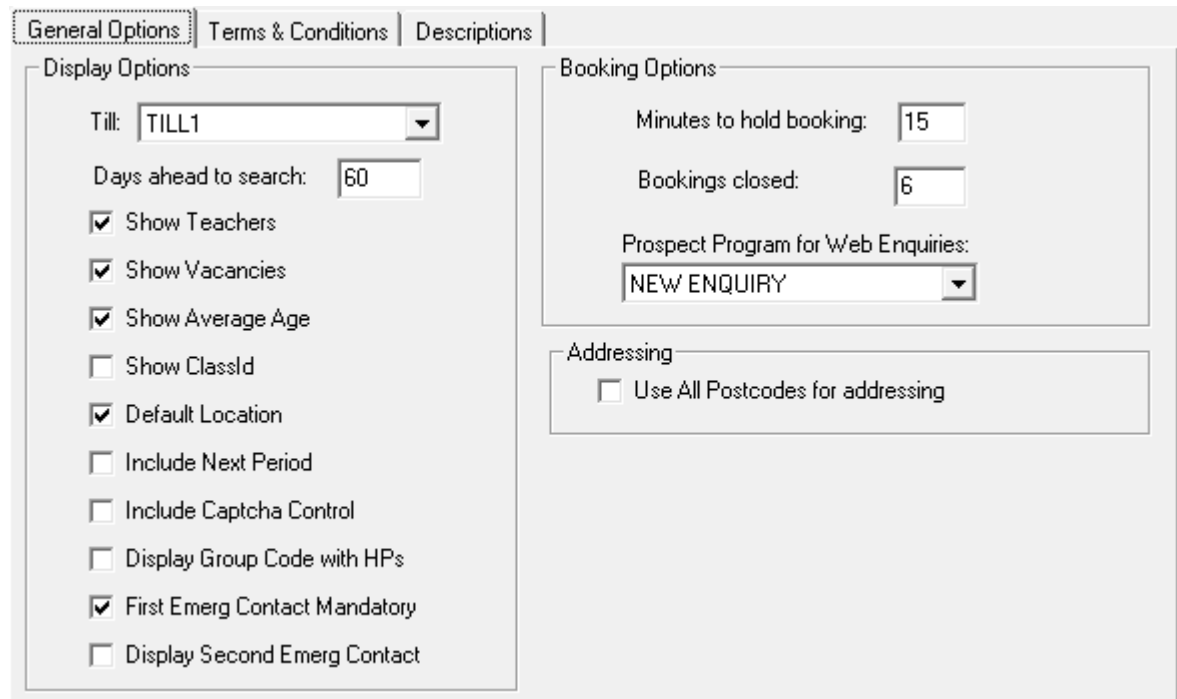
Click to add to the list of Access Points setup for this Location



Admin > Site > Setup Locations/Other Site Parameters > Classweb

Setup options for the use of Classweb

Admin > Site > Setup Locations/Other Site Parameters > Classweb > General Options



## Display Options

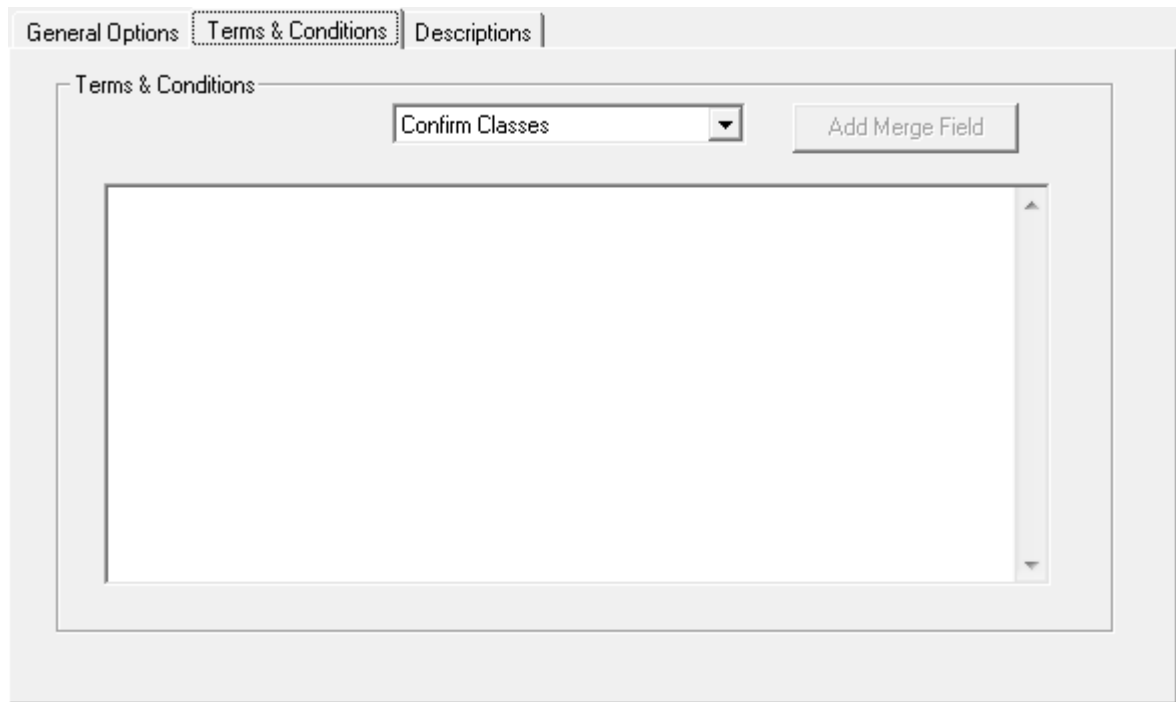
Till	You will need to set the till you wish transactions made over the web to be processed through
Days ahead to search	Define how many days in advance customers can search using Classweb
Show Teachers	If this is not selected the teachers assigned to each class will not be displayed on the web
Show Vacancies	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 ClassID	Primarily used for testing, however you can display the class id online if you wish

Default Location	This should only be checked in consultation with Links support staff if you are operating a multi location database
Include Next Period	Select this option if you wish for customers to be charged a pro rata & the next Direct Debit period amounts upfront
Include Captcha Control	Select this option if you wish to include a Captcha control on the website displayed when new customers sign up
Display Group Code with HPs	If you wish to display both the group code and the level name for your Holiday Program class types then you can select this option here
First Emerg Contact Mandatory	Select this option if you want to restrict customers from making bookings without providing one emergency contact for the students
Display Second Emerg Contact	Select this option if you wish to display two entry boxes for emergency details to be entered
<b>Booking Options</b>	
Minutes to hold booking	When a customer confirms a booking online, they then need to pay for the booking using a credit card. This option allows you to control how long they have between confirming the booking and making payment.
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.
Prospect Program for Web Enquiries	When a customer registers on the web but does NOT book into any classes they are populated on a web to do list. From the web to do list you can then turn the enquiry into a prospect. This program is the retention program they will be assigned to from the web to do screen.
<i>Addressing</i>	
Use All Postcodes for addressing	Uses all the postcodes in the database on web form



Admin > Site > Setup Locations/Other Site Parameters > Classweb > Terms & Conditions

Here is where you enter the text of Terms and Conditions for use of Classweb



Confirm classes

This option is required to be confirmed when a customer confirms the selection of a class. This would traditionally be the general booking terms and conditions usually found on a booking form.

Credit Card payment

These terms and conditions are required to be confirmed when a customer pays for their booking online. You may need to discuss the required terms and conditions with your online credit card processing provided such as LinksPay, MMOA or NPC.

Direct Debit

If you are running perpetual direct debit/billing lessons, then customers will need to confirm to these terms and conditions as part of registering their bank or credit card details. Again you may need to check with your Links direct debit provider for details. These details would be the details you currently have on your DDR or Direct Debit Authority paper forms.

General Options | Terms & Conditions | **Descriptions**

Descriptions

Holiday Program Name:

Web Theme Name:

Login Title:

Term Name:

Credit Cards Message:

Holiday program name	This option allows you to control what holiday programs are called on the web, for example Holiday Intensives, Swim VAC, Summer Camp
Web theme name	This is the colour scheme you will assign to the web. See the technical manual for further information
Login title	This text is displayed on the main screen of the web where customers can register and login
Term name	A term in Links is not always referred to as a term. For example it could be a block or a session. Here you can rename how it displays online
CC message	This can say what credit cards you accept for payments



Admin > Site > Setup Locations/Other Site Parameters > e-blast

e-blast is an extra service offered to Links clients that allows you to manage email and SMS campaigns for members. Please contact your Links representative for more information.

Details	Stock Stores	Tills	Templates	Appoint's / Cards	Memberships	Visit Passes
Class Types	Sessions	Access Points	Classes.Web	<b>e-blast</b>	Security	

e-blast Settings

e-blast is an extra service offered to Links clients that allows you to manage email and SMS campaigns of members. Please contact your Links representative for more information

e-blast

e-blast Site Id:

e-blast Key:

Setup the security level for staff passwords.

Details	Stock Stores	Tills	Templates	Appoint's / Cards	Memberships	Visit Passes
Class Types	Sessions	Access Points	Classes.Web	e-blast	<b>Security</b>	

**Staff Passwords**

Strong passwords is a term used to describe the difficulty of people to guess other peoples passwords and being able to impersonate them.  
 Having a password policy that ensures that passwords are changed regularly and that there is a maximum number of invalid attempts before the user is made inactive is also important.  
 PCI compliance requires that strong passwords must be used for all users and that a password policy is enforced.

Strong Passwords

No. Invalid Attempts:

Days to change password:

Strong Passwords

Staff passwords must be 7-20 characters long and contain a combination of the following:

1. Uppercase letters
2. Lowercase letters
3. Numbers (0-9)
4. Special Characters

No. Invalid Attempts

Define the number of times a staff member's password can be entered incorrectly before it will be locked out

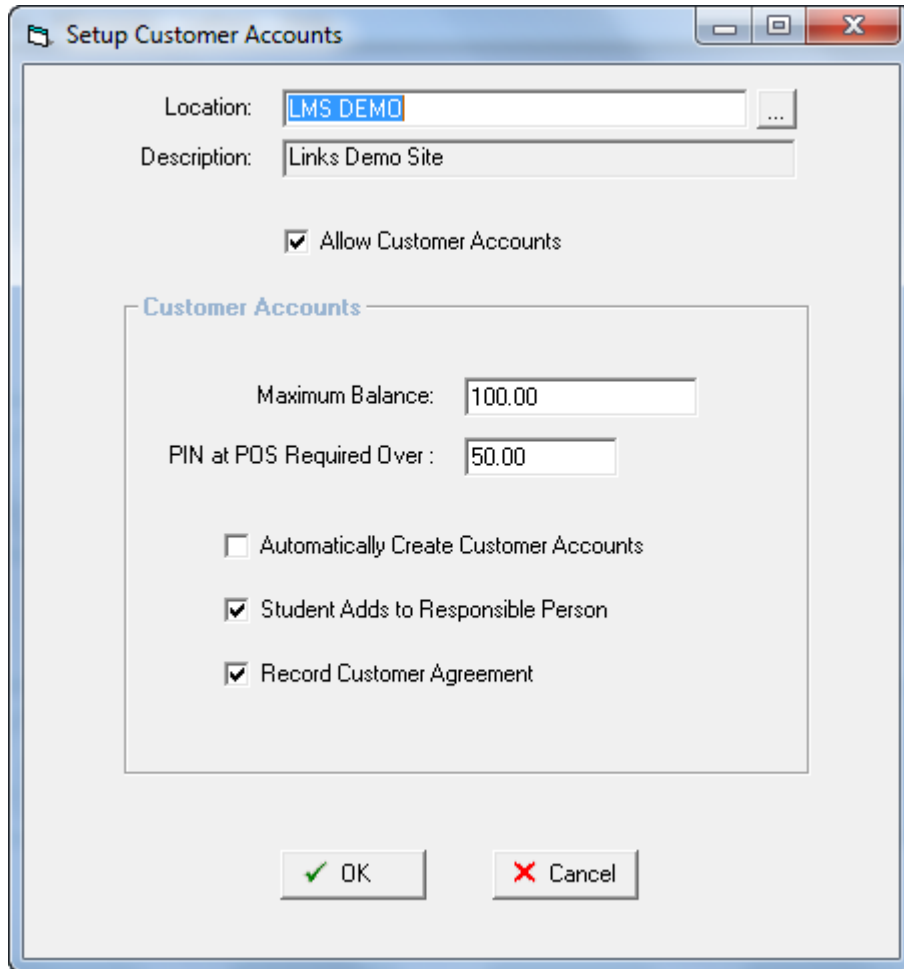
Days to change password

Specify the number of days before staff must change their passwords

## Customer Accounts

Admin > Site > Setup Customer Accounts

Customer Accounts allow money to be loaded on Customer Cards and used to make payments through POS.



Allow Customer Accounts

Tick to enable the creation of Customer Accounts

Maximum Balance

Enter a maximum balance the customer can have on their account, as in the positive amount of credit they can hold at any one time. This avoids people getting too much credit and the centre holding too much liability.

PIN at POS Required Over

When processing a payment over the specified limit, a PIN will be required to authorise the transaction

Automatically Create Customer Accounts

All customers will get a customer account when entered into the system

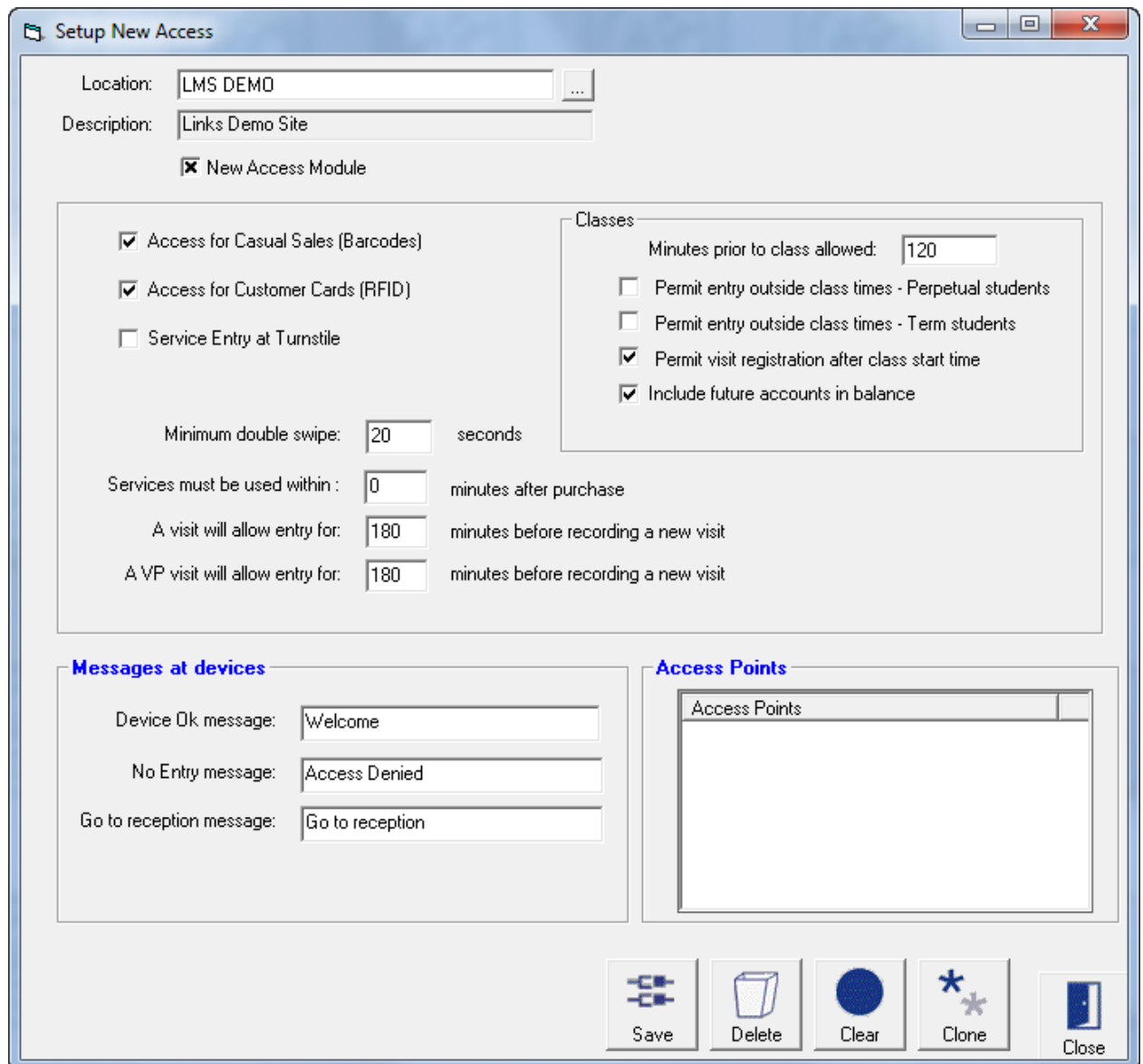
Student Adds to Responsible Person

Purchases made by Students will be added to the Responsible Person account rather than the Student's

Record Customer Agreements

### New Access Parameters

Admin > Site > New Access Parameters



**Setup New Access**

Location:

Description:

New Access Module

Access for Casual Sales (Barcodes)

Access for Customer Cards (RFID)

Service Entry at Turnstile

Classes

Minutes prior to class allowed:

Permit entry outside class times - Perpetual students

Permit entry outside class times - Term students

Permit visit registration after class start time

Include future accounts in balance

Minimum double swipe:  seconds

Services must be used within :  minutes after purchase

A visit will allow entry for:  minutes before recording a new visit

A VP visit will allow entry for:  minutes before recording a new visit

**Messages at devices**

Device Ok message:

No Entry message:

Go to reception message:

**Access Points**

Access Points

Save Delete Clear Clone Close

## Setup New Access

New Access Module	This is for Links Modular Solutions staff Only
Access for Casual Sales (Barcodes)	If this option is selected, casuals (ie: adult swim entry) will be allowed to enter through the access point with a barcode that they have purchased.
Access for Customer Cards (RFID)	If this option is selected, customers with RFID cards or bands will be allowed to enter through the access point
Service Entry at Turnstile	Select this to enable, a client to have a barcode generated against a casual sale, which enables them to enter through a turnstile with said barcode.
Minimum double swipe	Specifies the amount of time in seconds a user has to wait to re-swipe their access band/card at an Access Point
Services must be used within...	This is the time that the customer has to use their barcode ticket to enter through the access point before it expires.
A visit pass will allow entry for...	Specifies the amount of time before a new visit will be registered at an Access Point, or in the instance of single use barcodes, the amount of time before they will become unusable
A VP visit will allow entry for...	Specifies the amount of time that will pass before an additional visit will be removed from a pass at an Access Point
Classes	
Minutes prior to class allowed	The number of minutes that can arrive before a class commences and be registered for that class
Permit entry outside class times – Perpetual students	This will allow a student to have access into the centre outside of their scheduled class time if they are booked into a class type that is direct debiting
Permit entry outside class times – Term students	This will allow a student to have access into the centre outside of their scheduled class time if they are booked into a class type that is term based

Permit visit registration after class start time

Records attendance for a student if they register after the scheduled class start time

Include future accounts in balance

Only uncheck if you don't want new term fees to be displayed until the term starts

### Messages at devices

Device OK message

The message to be displayed at entry point when access is granted

No Entry message

The message to be displayed at entry point when access is denied

Go to reception message

The message to be displayed at entry point when a message has been left for the customer

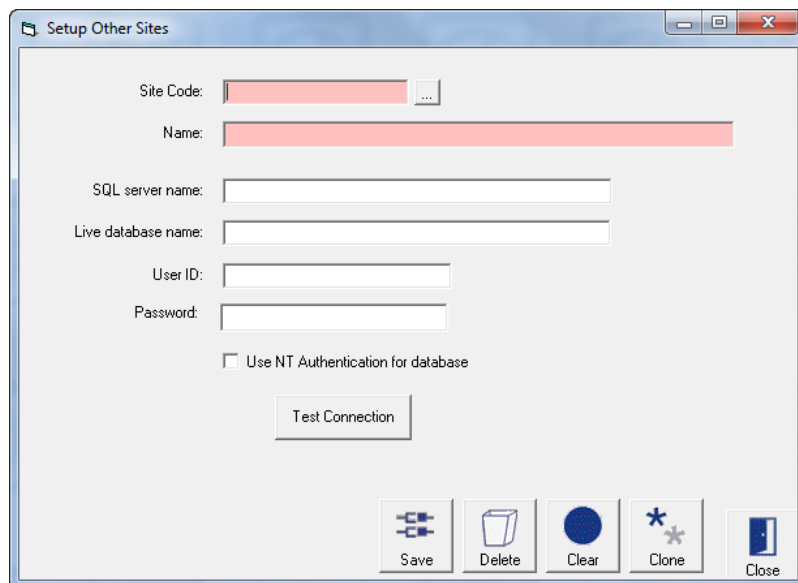
### Access Points

Listed are the Access Points setup for this location.

### Other Sites

Admin > Site > Other Sites

Links has the ability to register visits from customers who belong to another facility. This makes it possible to offer reciprocal rights to customers by linking one or more facilities and sharing database details.



Setup Other Sites

Site Code:

Name:

SQL server name:

Live database name:

User ID:

Password:

Use NT Authentication for database

Test Connection

Save Delete Clear Clone Close

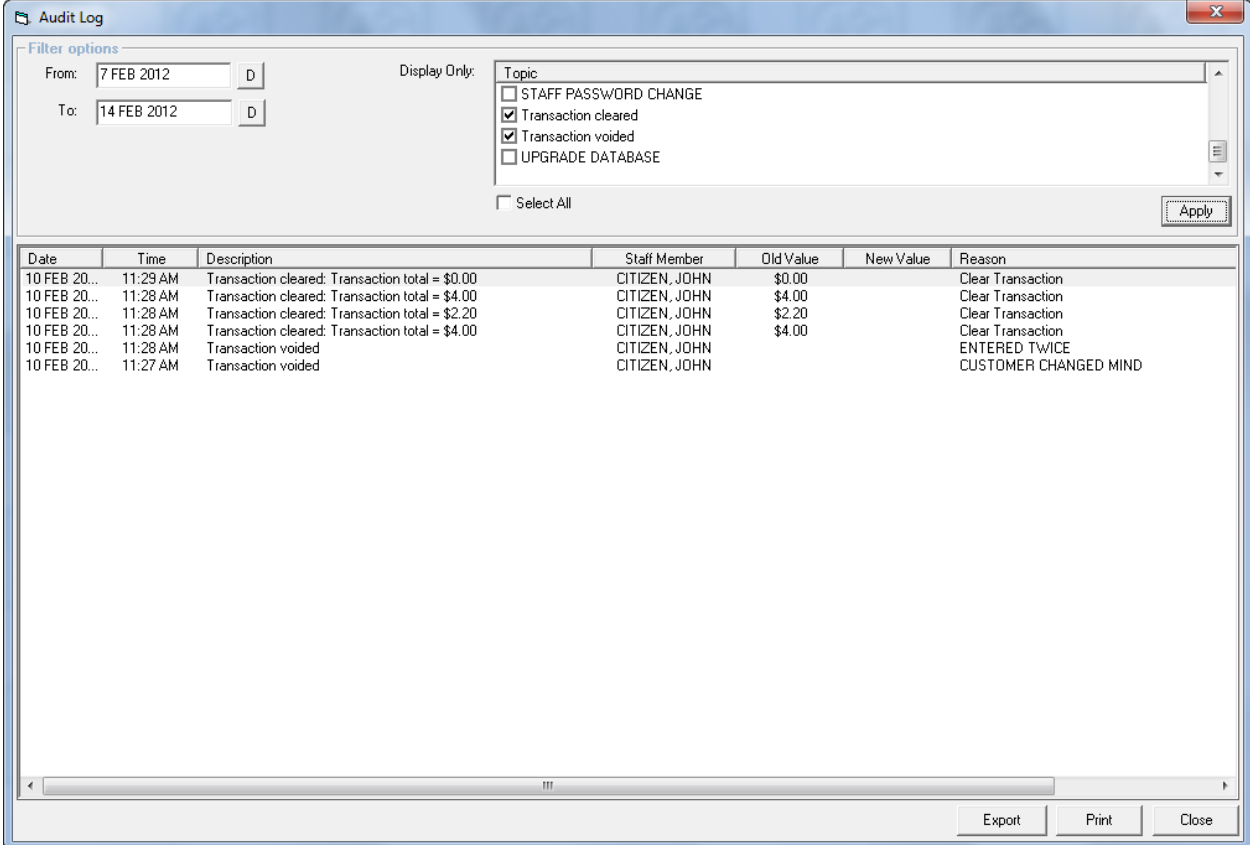


This screen should only be updated by Links Modular Solutions staff and settings should not be altered unless directed by Links Modular Solutions.

## Audit Log

Admin > Site > Audit Log

The information shown on this window is an audit log of transactions and functions that have been conducted between two dates.



The screenshot shows the 'Audit Log' window with the following details:


**Filter options:**



- From: 7 FEB 2012
- To: 14 FEB 2012
- Display Only:
  - STAFF PASSWORD CHANGE
  - Transaction cleared
  - Transaction voided
  - UPGRADE DATABASE
  - Select All

**Table of Transactions:**

Date	Time	Description	Staff Member	Old Value	New Value	Reason
10 FEB 20...	11:29 AM	Transaction cleared: Transaction total = \$0.00	CITIZEN, JOHN	\$0.00		Clear Transaction
10 FEB 20...	11:28 AM	Transaction cleared: Transaction total = \$4.00	CITIZEN, JOHN	\$4.00		Clear Transaction
10 FEB 20...	11:28 AM	Transaction cleared: Transaction total = \$2.20	CITIZEN, JOHN	\$2.20		Clear Transaction
10 FEB 20...	11:28 AM	Transaction cleared: Transaction total = \$4.00	CITIZEN, JOHN	\$4.00		Clear Transaction
10 FEB 20...	11:28 AM	Transaction voided	CITIZEN, JOHN			ENTERED TWICE
10 FEB 20...	11:27 AM	Transaction voided	CITIZEN, JOHN			CUSTOMER CHANGED MIND

Buttons at the bottom: Export, Print, Close, and an Apply button in the filter options section.

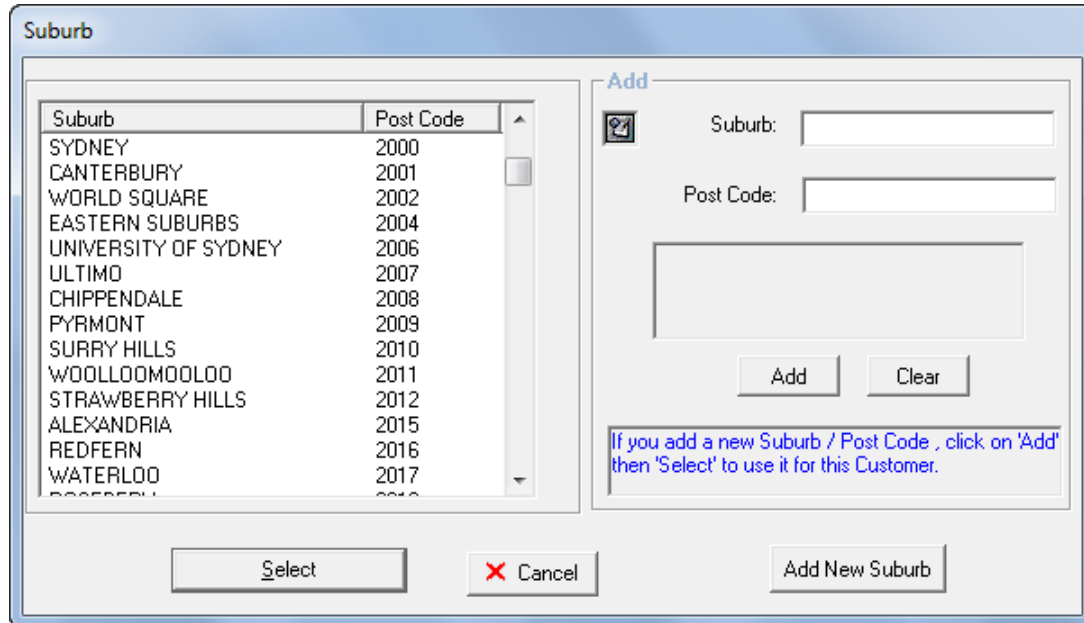
Select the relevant topic of transaction or function and click ; the window will display the date, time and description of the transaction, as well as the staff code and reason given. This window will also include transactions that have been consolidated.

Select  to preview and print a report of the selected transactions or  the data to an Excel document.

## Suburbs

Admin > Site > Suburb

Maintain the database of Suburbs and associated post codes.



**Suburb**

Suburb	Post Code
SYDNEY	2000
CANTERBURY	2001
WORLD SQUARE	2002
EASTERN SUBURBS	2004
UNIVERSITY OF SYDNEY	2006
ULTIMO	2007
CHIPPENDALE	2008
PYRMONT	2009
SURRY HILLS	2010
WOOLLOOMOOLOO	2011
STRAWBERRY HILLS	2012
ALEXANDRIA	2015
REDFERN	2016
WATERLOO	2017
ROSEBERY	2018

**Add**

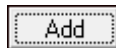
Suburb:

Post Code:

If you add a new Suburb / Post Code , click on 'Add' then 'Select' to use it for this Customer.

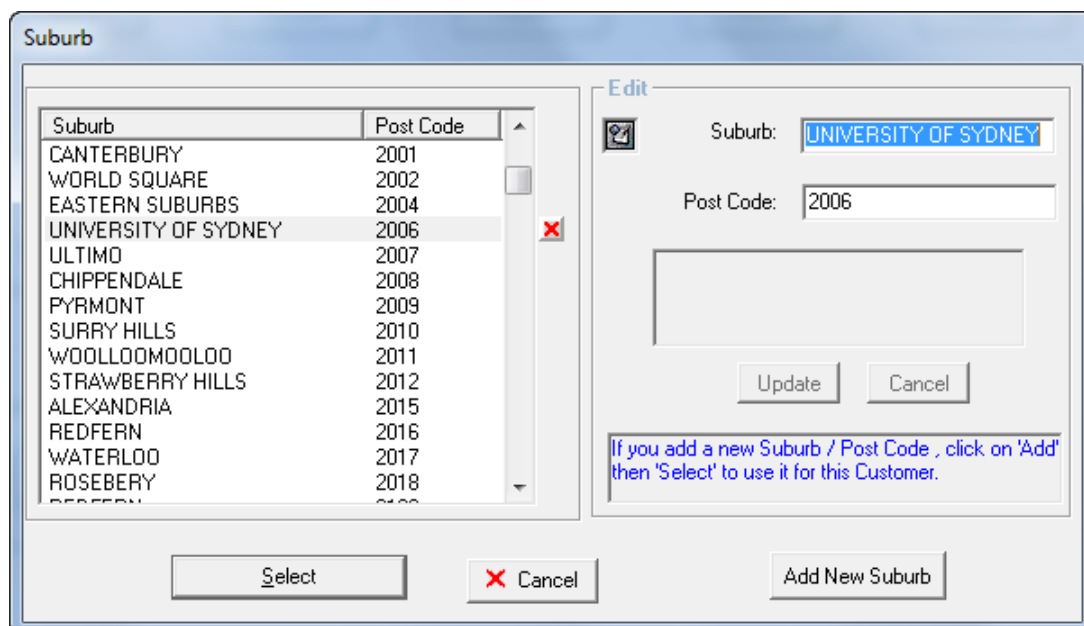
Add New Suburb

Type in the Suburb and Post Code and click



Edit Suburb

1. Highlight the entry to be edited



**Suburb**



Suburb	Post Code
CANTERBURY	2001
WORLD SQUARE	2002
EASTERN SUBURBS	2004
UNIVERSITY OF SYDNEY	2006
ULTIMO	2007
CHIPPENDALE	2008
PYRMONT	2009
SURRY HILLS	2010
WOOLLOOMOOLOO	2011
STRAWBERRY HILLS	2012
ALEXANDRIA	2015
REDFERN	2016
WATERLOO	2017
ROSEBERY	2018

**Edit**

Suburb:

Post Code:

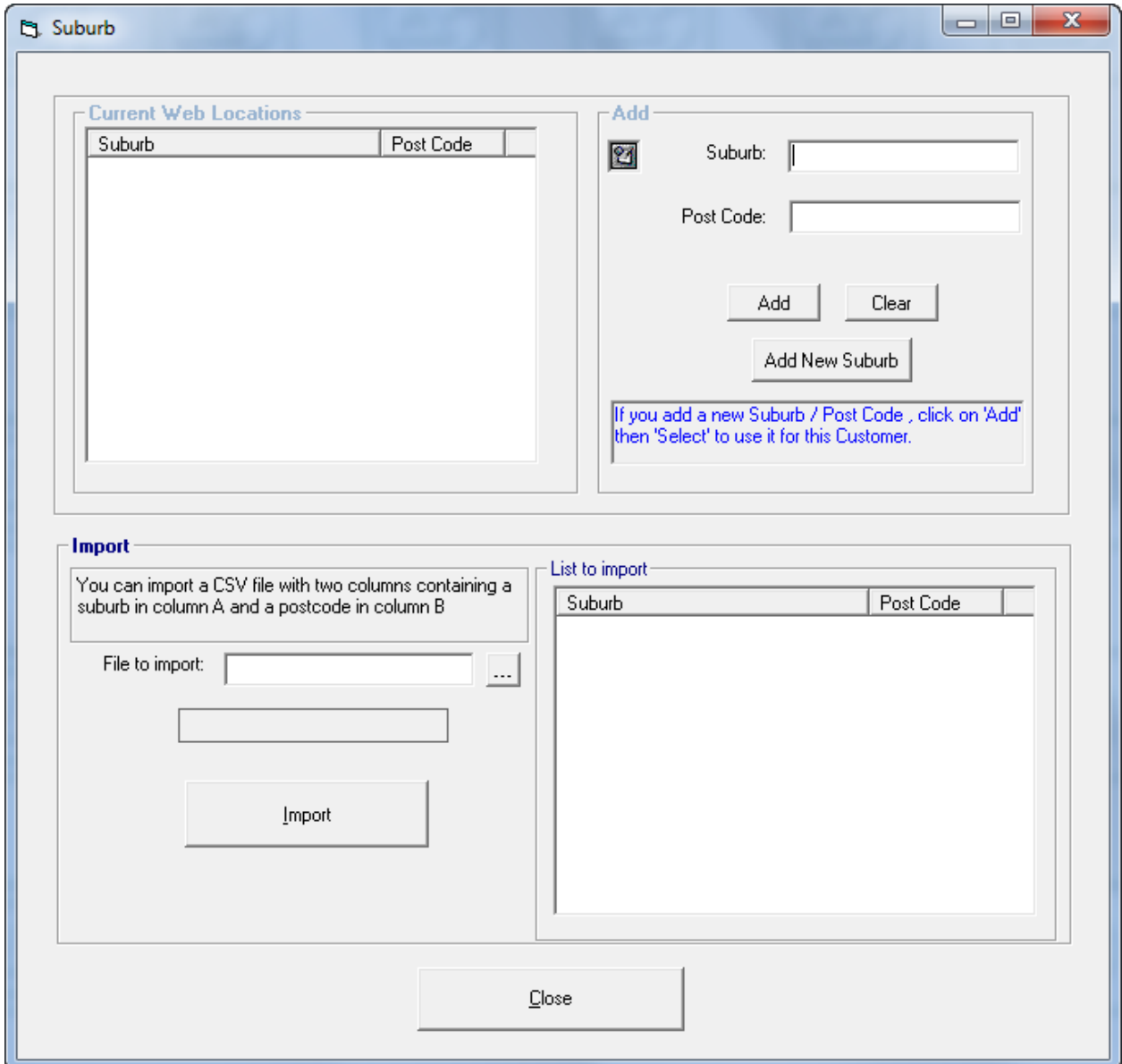
If you add a new Suburb / Post Code , click on 'Add' then 'Select' to use it for this Customer.

- Click the  to delete the entry; or edit the Suburb and click .  
N.B. The Suburb and Postcode combination cannot be deleted if a Customer Id has the combination. Adjusting a Suburb will update all people, suppliers and clients in Links with that suburb to the new entry.

## Web Suburbs

Admin > Site > Web Suburbs

A separate list of Suburbs and Postcodes (Cities and Zip codes) can be entered if you do not wish to use existing records contained in the database. This is commonly used when the database contains messy historical data.



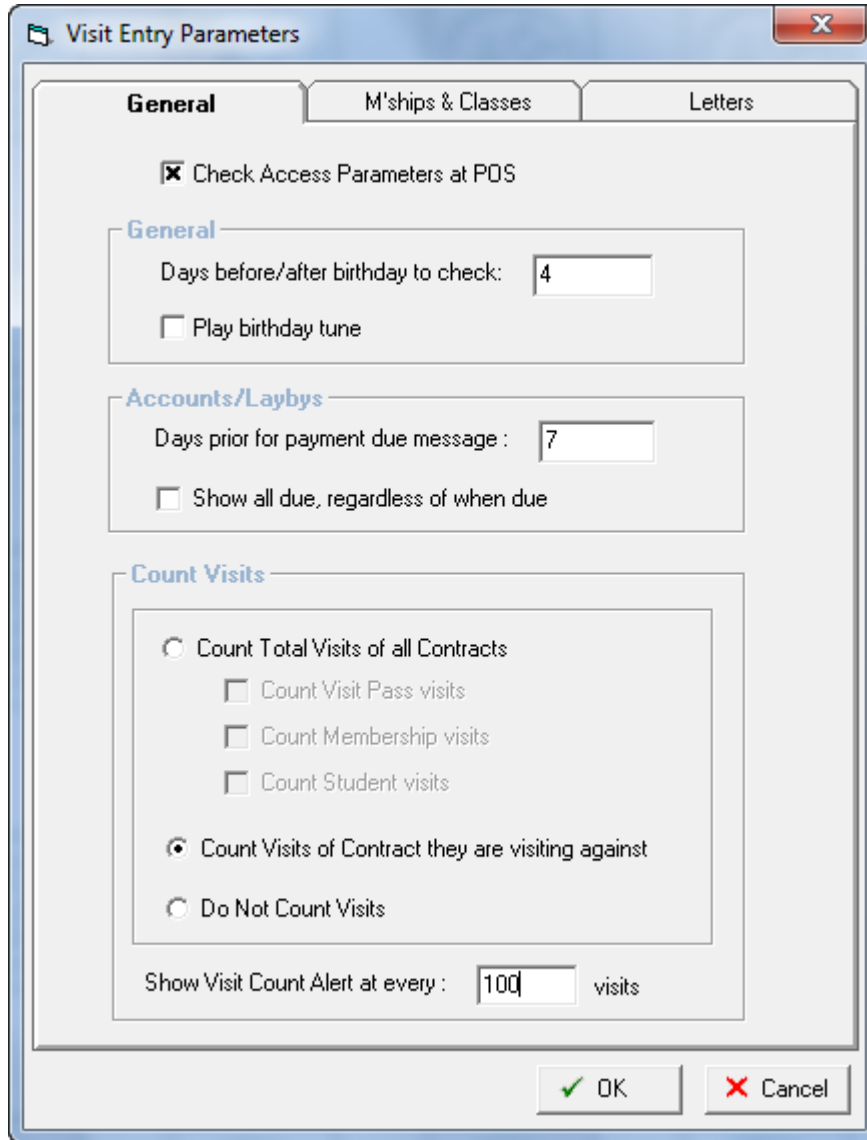
The screenshot shows a window titled "Suburb" with the following sections:

- Current Web Locations:** A table with columns "Suburb" and "Post Code".
- Add:**
  - Suburb:
  - Post Code:
  - Buttons: Add, Clear, Add New Suburb
  - Instruction: *If you add a new Suburb / Post Code , click on 'Add' then 'Select' to use it for this Customer.*
- Import:**
  - Text: "You can import a CSV file with two columns containing a suburb in column A and a postcode in column B"
  - File to import:  ...
  - Buttons: Import
- List to import:** A table with columns "Suburb" and "Post Code".
- Close:** A button at the bottom center.

## Visit Parameters

Admin > Site > Visit Parameters

Admin > Site > Visit Parameters > General



Check Access Parameters at POS

The rules setup in Access Parameters will be used on a manual swipe at POS. Typically used at multi locations sites to restrict access across sites

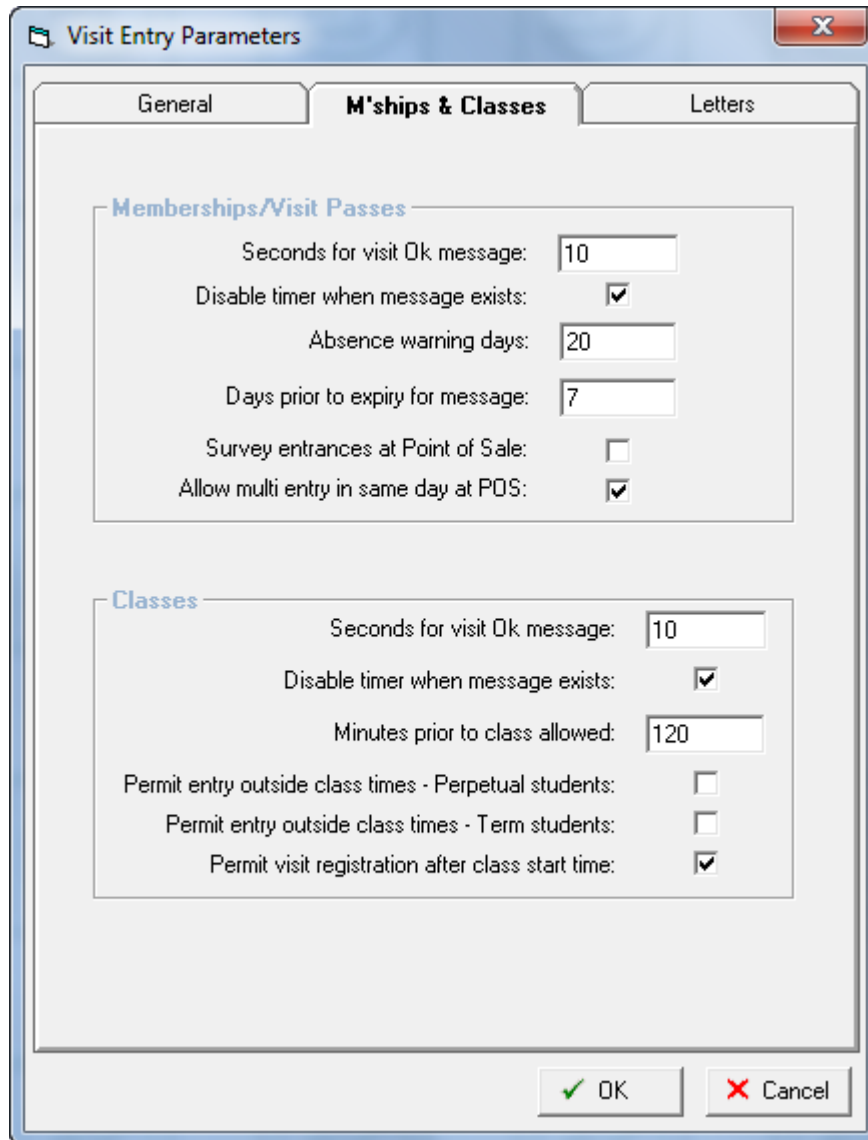
General

Days before/after birthday to check

This field represents a message that will be displayed through POS to advise of the Customer's birthday



Play birthday tune	Tick this box to activate the system to also play a birthday tune for the customer when the message is displayed – your system will require a soundcard to hear the tune. See Admin > Setup PC
Accounts/Laybys	
Days prior for payment due message	A message will appear at POS if the customer has a payment due on an account or a layby within the specified time frame
Show all due, regardless of when due	The full amount of an Account or Layby will be displayed regardless of when it is due
Count Visits	
Count Total Visits of all Contracts	Counts the total visits of a customer of any Membership contract, Visit Pass or Class that they have ever had
Count Visits of Contract they are visiting against	Counts the visits of a customer for the specific Membership contract, Visit Pass or Class that they registering a visit against
Do Not Count Visits	Does not count visits
Show Visit Count Alert at every...	An alert is displayed after the specified number of visits



*Memberships/Visit Passes*

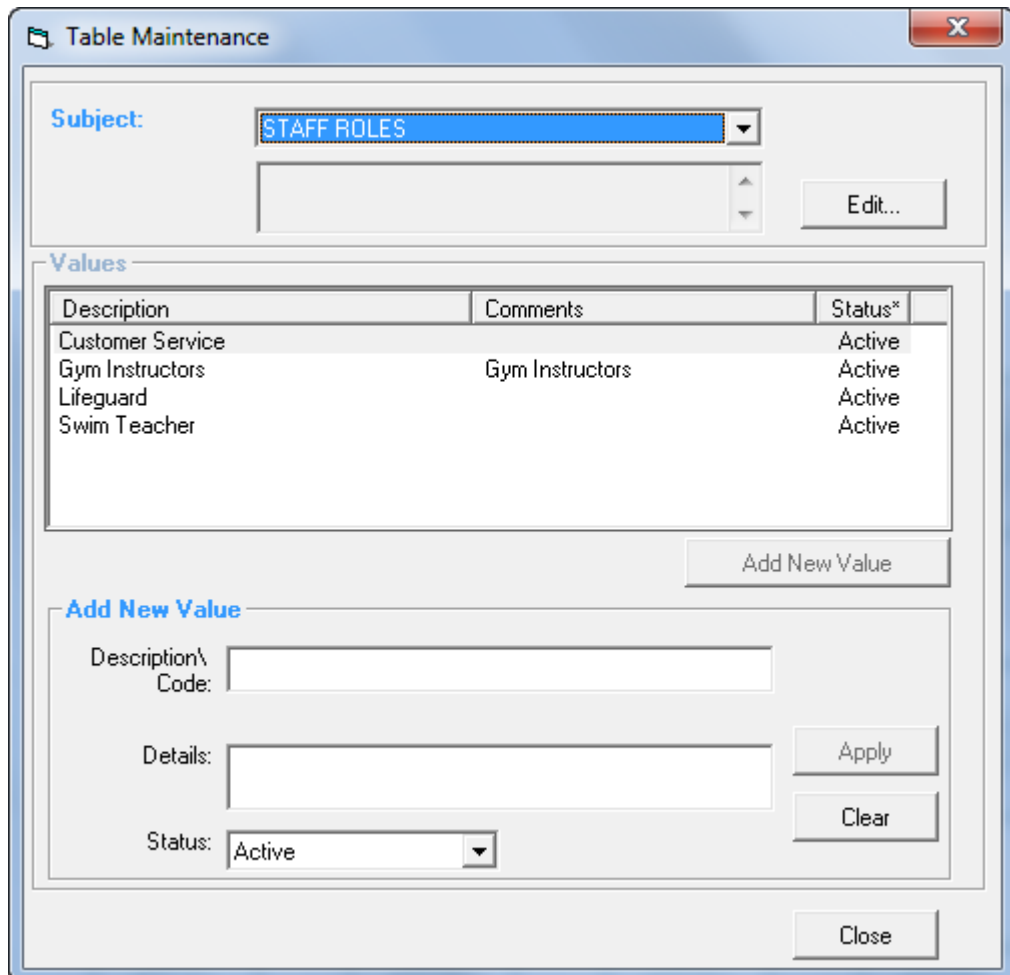
Seconds for visit OK message	Set the number of seconds the visit entry message for Membership & Visit Pass holders will remain on the screen before it disappears. Visit entry messages are used when visits are recorded through POS
Disable timer when message exists	Message will remain and not disappear without POS user's action
Absence warning days	When the customer registers a visit after an absence of this many days, a message will be displayed advising the user of the number of days of the members' absence

Days prior to expiry for message	The number of days before a membership or visit pass is due to expiry, a warning will display at POS. It allows the user to advise the customer that their membership is due to expire
Survey entrances at Point of Sale	When activated, all membership and visit pass holders whose entrance is recorded, will produce a display at POS that lists the activities that are linked to their current membership or visit pass. The POS operator can then select the activities that the customer is utilising during the visit.  Note: The Activities creation screen is in the Membership/VP menu and activities are allocated within the membership and VP detail screens.
Allow multi entry in same day at POS	Allows attendance more than once in a day without warning
Classes	
Seconds for visit OK message	Set the number of seconds the visit entry message for Students will remain on the screen before it disappears. Visit entry messages are used when visits are recorded through POS
Disable timer when message exists	Message will remain and not disappear without POS user's action
Minutes prior to class allowed	The number of minutes that a student can arrive before a class commences and be registered for that class
Permit entry outside class times – Perpetual students	This will allow a student to have access into the centre outside of their scheduled class time if they are booked into a class type that is direct debiting
Permit entry outside class times – Term students	This will allow a student to have access into the centre outside of their scheduled class time if they are booked into a class type that is term based
Permit visit registration after class start time	Record an attendance for a student if they register after the scheduled class start time

## Table Maintenance

Admin > Site > Table Maintenance

The Table Maintenance screen allows you to define the options that can be selected through various functions in Links to aid in the collection of relevant data.



Subject

Use the  to select the Table to be edited.

Values

Listed are the values already available within the selected table

Add New Value

Enter the Description/Code and Details for the value and click .

Comments/Details for values can also be edited by highlighting the description line, updating the details/status and clicking Apply.

To delete a value, highlight the description line and click the .

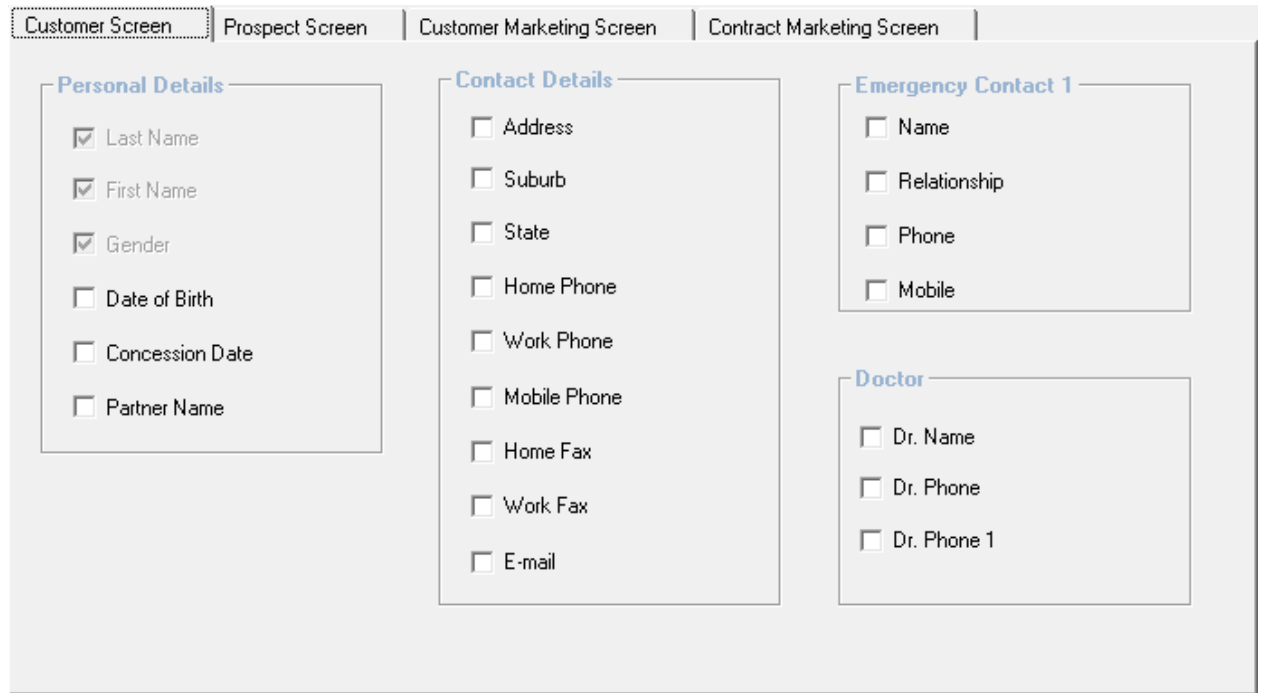


## Mandatory Fields

Admin > Site > Mandatory Fields

Use this screen to identify fields in the Customer, Prospect, Customer Marketing and Contract Marketing screens that must be filled in when entering data.

Admin > Site > Mandatory Fields > Customer Screen



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

**Personal Details**

- Last Name
- First Name
- Gender
- Date of Birth
- Concession Date
- Partner Name

**Contact Details**

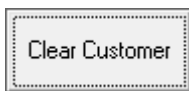
- Address
- Suburb
- State
- Home Phone
- Work Phone
- Mobile Phone
- Home Fax
- Work Fax
- E-mail

**Emergency Contact 1**

- Name
- Relationship
- Phone
- Mobile

**Doctor**

- Dr. Name
- Dr. Phone
- Dr. Phone 1



Clears the mandatory fields selected for the Customer Screen

Customer Screen | **Prospect Screen** | Customer Marketing Screen | Contract Marketing Screen

Personal Details	Contact Details	Other
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Address	<input type="checkbox"/> Marriage Status
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Suburb	<input type="checkbox"/> Partner Name
<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> State	<input type="checkbox"/> Occupation
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Work Phone	<input type="checkbox"/> Employer
<input type="checkbox"/> Mobile Phone	<input type="checkbox"/> Fax	<input type="checkbox"/> Corporate Group
<input type="checkbox"/> E-mail	<b>Marketing</b>	<input type="checkbox"/> Interests
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> First Contact	<input type="checkbox"/> Salary Range
	<input type="checkbox"/> Source	
	<input type="checkbox"/> Type	
	<input type="checkbox"/> Promotion	

Clear Prospect

Clears the mandatory fields selected for the Prospect Screen

Customer Screen	Prospect Screen	<b>Customer Marketing Screen</b>	Contract Marketing Screen
-----------------	-----------------	----------------------------------	---------------------------

**Reason for joining this Centre**

Reason

Estimate distance living from Centre

Direction living from Centre

**Other**

Marriage Status

Partner Name

Nationality

Main Language Spoken at Home

Occupation

Employer

Corporate Group

Interests

Salary Range

**Marketing**

First Contact

Source

Type

Promotion

**Extras**

Extra Field 1

Extra Field 2

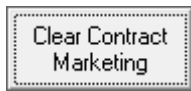
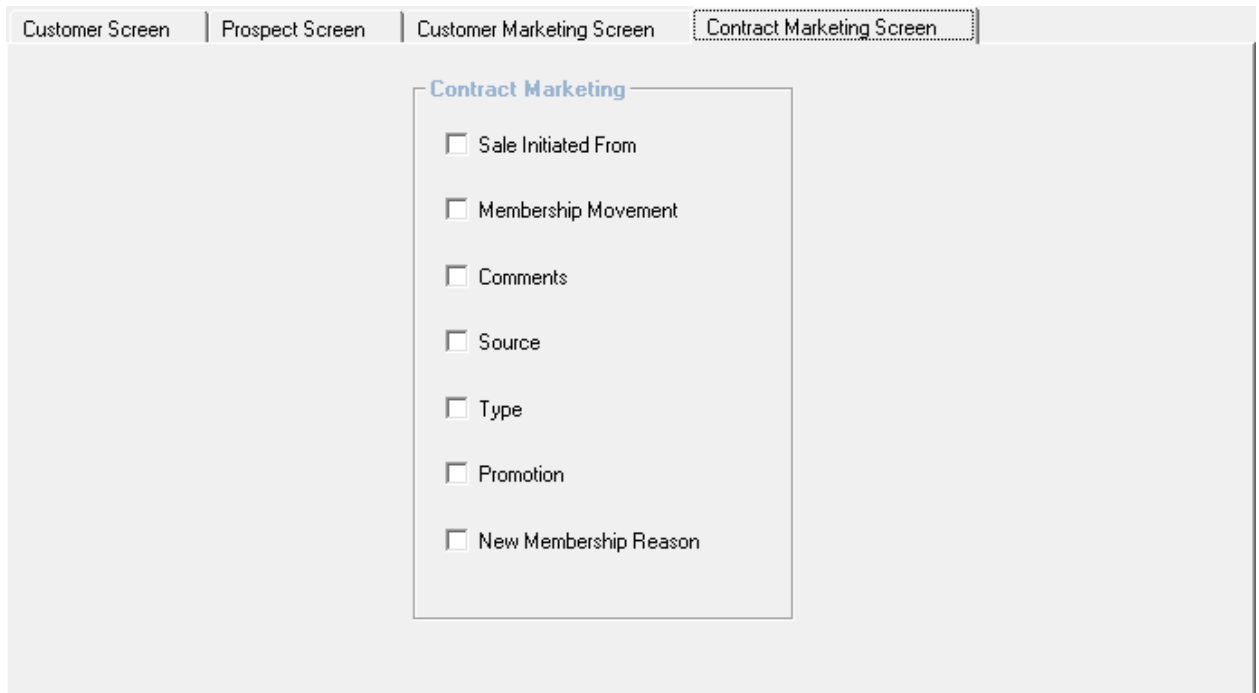
Extra Field 3

Extra Field 4



Clears the mandatory fields selected for the Customer Marketing Screen

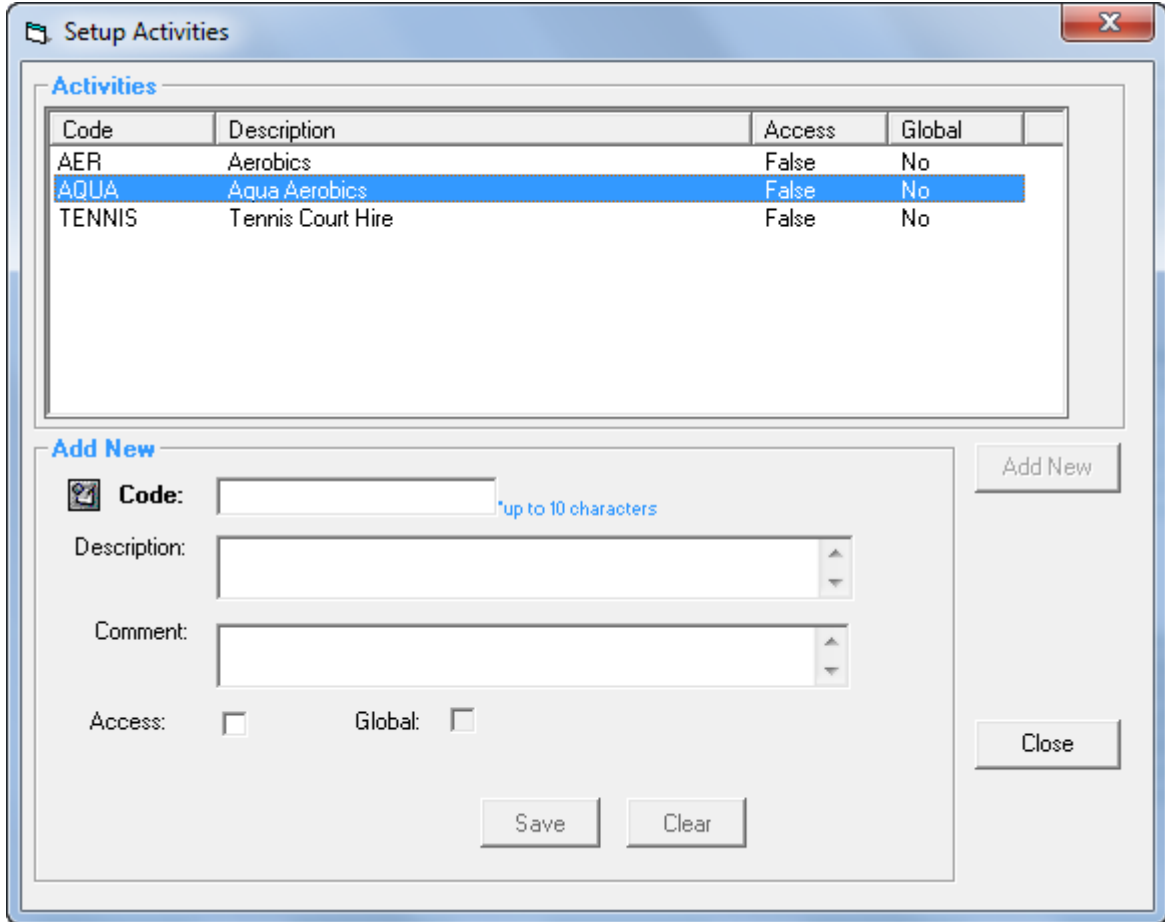
Admin > Site > Mandatory Fields > Contract Marketing Screen



Clears the mandatory fields selected for the Contract Marketing Screen

## Activities

Admin > Site > Activities



Code	Description	Access	Global
AER	Aerobics	False	No
AQUA	Aqua Aerobics	False	No
TENNIS	Tennis Court Hire	False	No

**Add New**

**Code:**  \*up to 10 characters

**Description:**

**Comment:**

**Access:**  **Global:**

Buttons: Save, Clear, Add New, Close

Activities that are setup in this screen can be allocated to Memberships and Visit Passes. These activities are used as part of the Members Survey process that is integrated with POS. When activated, upon recording a visit at the POS for all customers with Memberships and Visit Passes, a dialog box will be displayed listing the activities allocated to the membership or visit pass. It is then possible to select the activities and save the information. An activities report can then be produced that displays what activities members and visit pass holders are utilising

Add New

**Code** Enter a code to represent the new activity


**Description** Type the full description of the activity

**Comment** Type in a comment for the activity

**Access** Tick the check box if the activity is to be used for access module

Global Tick the check box if the activity is to be used across all locations in a multi location database

Edit an Activity

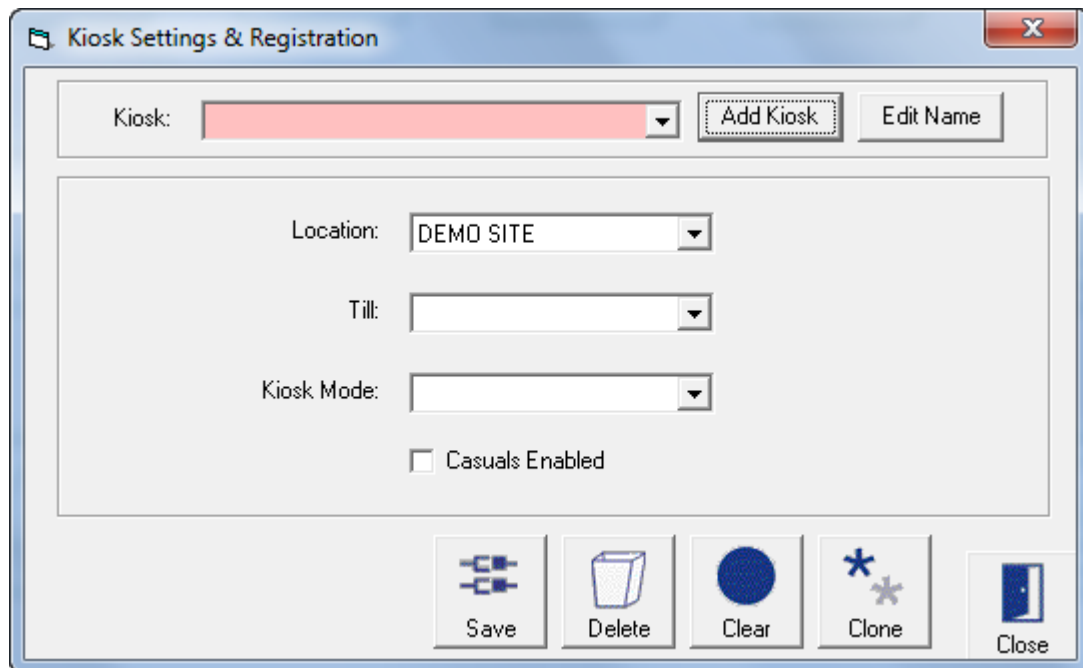
Edit or Delete Highlight the activity you wish to delete or edit. To delete, click the  . If you want to edit the entry you will only be able to change the description

### Kiosk

Admin > Site > Kiosk > Setup & Registration

The Kiosk Setup & Registration screen is used by Links Modular Solutions staff when installing Kiosk.

Note: This screen should only be updated by Links Modular Solutions staff and settings should not be altered unless directed by Links Modular Solutions.



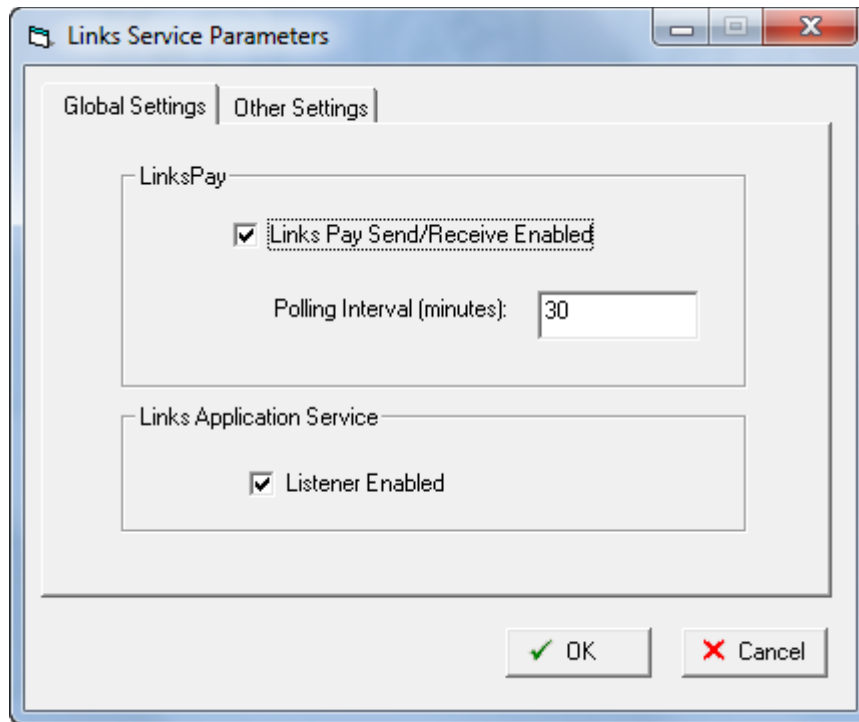
The screenshot shows a window titled "Kiosk Settings & Registration". At the top, there is a "Kiosk:" dropdown menu with a red highlight, followed by "Add Kiosk" and "Edit Name" buttons. Below this, there are three dropdown menus: "Location:" (set to "DEMO SITE"), "Till:", and "Kiosk Mode:". At the bottom of the form area is a checkbox labeled "Casuals Enabled" which is currently unchecked. At the very bottom of the window, there are five buttons: "Save" (with a floppy disk icon), "Delete" (with a trash can icon), "Clear" (with a blue circle icon), "Clone" (with a star icon), and "Close" (with a door icon).

## Links Service

Admin > Site > Links Service

The Links Service Parameters screen pertains to the setup of LinksPay.

Note: This screen should only be updated by Links Modular Solutions staff and settings should not be altered unless directed by Links Modular Solutions.



The screenshot shows a Windows-style dialog box titled "Links Service Parameters". It has two tabs: "Global Settings" (selected) and "Other Settings". The "Global Settings" tab contains two sections:

- LinksPay**:
  - Links Pay Send/Receive Enabled
  - Polling Interval (minutes):
- Links Application Service**:
  - Listener Enabled

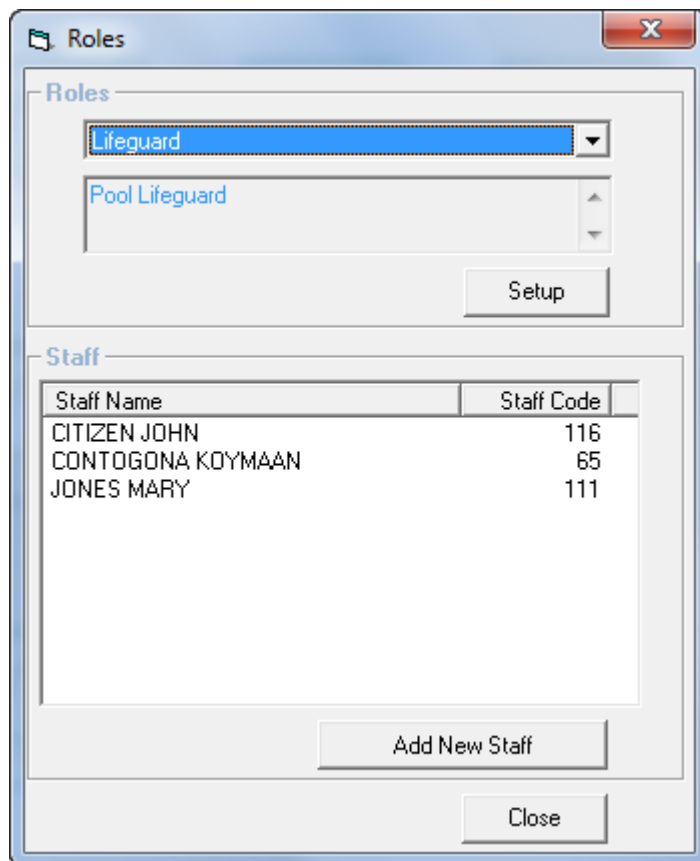
At the bottom of the dialog are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

## Admin > Admin

### Roles

Admin > Admin > Roles

Whilst staff members can be assigned to a role on an individual basis in Admin > Security > Staff Members, this screen allows for the bulk entry of staff into specific roles.



1. Select the Roles from the  and press the  button.

(If a new role is required, select  to enter the details for the new role).

2. A list of Staff Members will be displayed.
3. Highlight one or more staff members to be included and Select

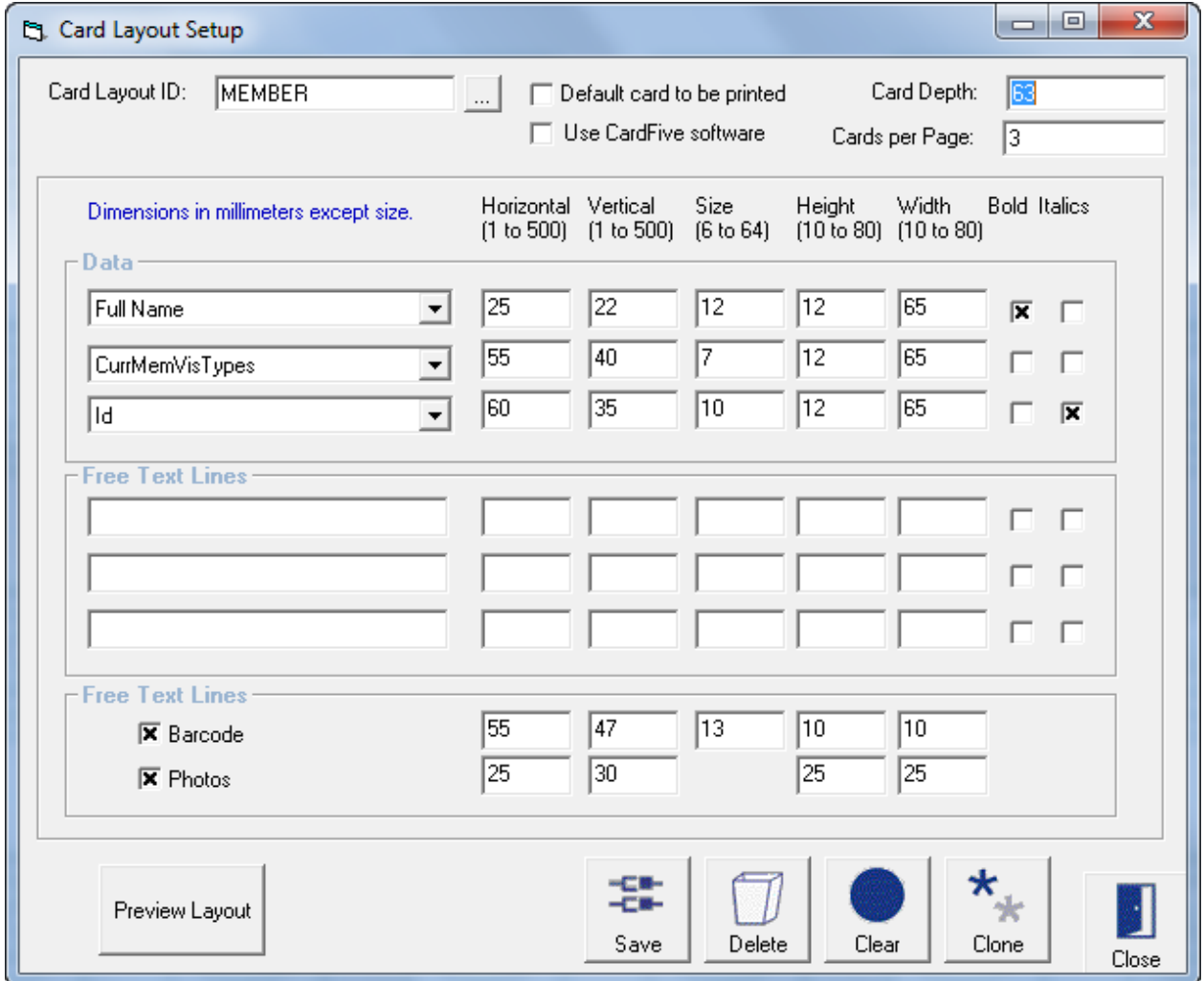
Note: To Select more than one staff member, hold down the Ctrl key and highlight the person.



## Card Layouts

Admin > Admin > Cards > Card Layouts

This window is used to customise the layout of your Membership, Visit Pass, Class enrolment and Staff cards to suit your card template. All numbers are represented as 'mm' (millimetres). See below for a sample of the card layout set up.



**Card Layout Setup**

Card Layout ID: MEMBER ...  Default card to be printed Card Depth: 63  
 Use CardFive software Cards per Page: 3

Dimensions in millimeters except size.	Horizontal (1 to 500)	Vertical (1 to 500)	Size (6 to 64)	Height (10 to 80)	Width (10 to 80)	Bold	Italics
<b>Data</b>							
Full Name	25	22	12	12	65	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CurrMemVisTypes	55	40	7	12	65	<input type="checkbox"/>	<input type="checkbox"/>
Id	60	35	10	12	65	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Free Text Lines</b>							
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
<b>Free Text Lines</b>							
<input checked="" type="checkbox"/> Barcode	55	47	13	10	10		
<input checked="" type="checkbox"/> Photos	25	30		25	25		

Preview Layout Save Delete Clear Clone Close

### Card Layout ID

Type in a name to identify the card

### Default Card to be Printed

Enables all cards (Members, Visit Passes, Classes and Staff) to be printed on the layout of this card type

### Card Depth and Cards Per Page

Relates to the depth of the card from the top of the page to perforated section below the bottom of card (normally A4 sheets with 3-4 cards per page will be 70-80mm)



**Data Lines** Click on the drop down arrow. A list of available dictionary items will be shown. Select the data line you would like to be printed

**Free Text Lines** If you wish to have more information appear on your cards this is typed here

**Barcode** Click the box if you wish a barcode to be printed out

**Photos** Click the box if you wish a photo to be printed out

Note: Fill in the following parameters so the system knows which is the front or the back of the card. Enter the numeric value to define your card layout.

**Horizontal** This represents the space indented from the left of the page/card to where you want the information to be printed. Measurements are in millimeters

**Vertical** This represents the space from the top of each card to where you want the information to be printed. Measurements are in millimeters

**Size** This represents the size of the font

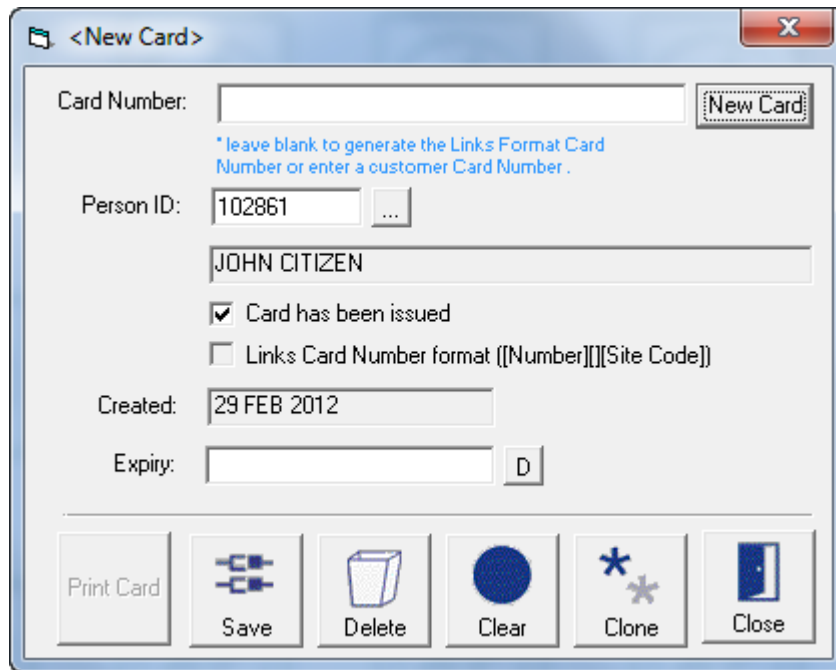
**Height/Width** This relates to the size of the text box in your template to accommodate the font size and information to be printed

**Bold & Italics** Click on this if you wish the line of text to be bold or italics

## Setup Cards

Admin > Admin > Cards > Setup Cards

This screen allows you to view cards that have been issued already and to set expiry dates on current cards.



Card Number:  New Card

\* leave blank to generate the Links Format Card Number or enter a customer Card Number .

Person ID:  ...


Card has been issued

Links Card Number format ([Number][Site Code])

Created:

Expiry:  D

Print Card Save Delete Clear Clone Close

Click on  to view the list of existing cards.

Displayed are Customer's names and the date their cards were created and have expired. Each time a new card is issued so is a new Card Number. This prevents a previous card from being active.

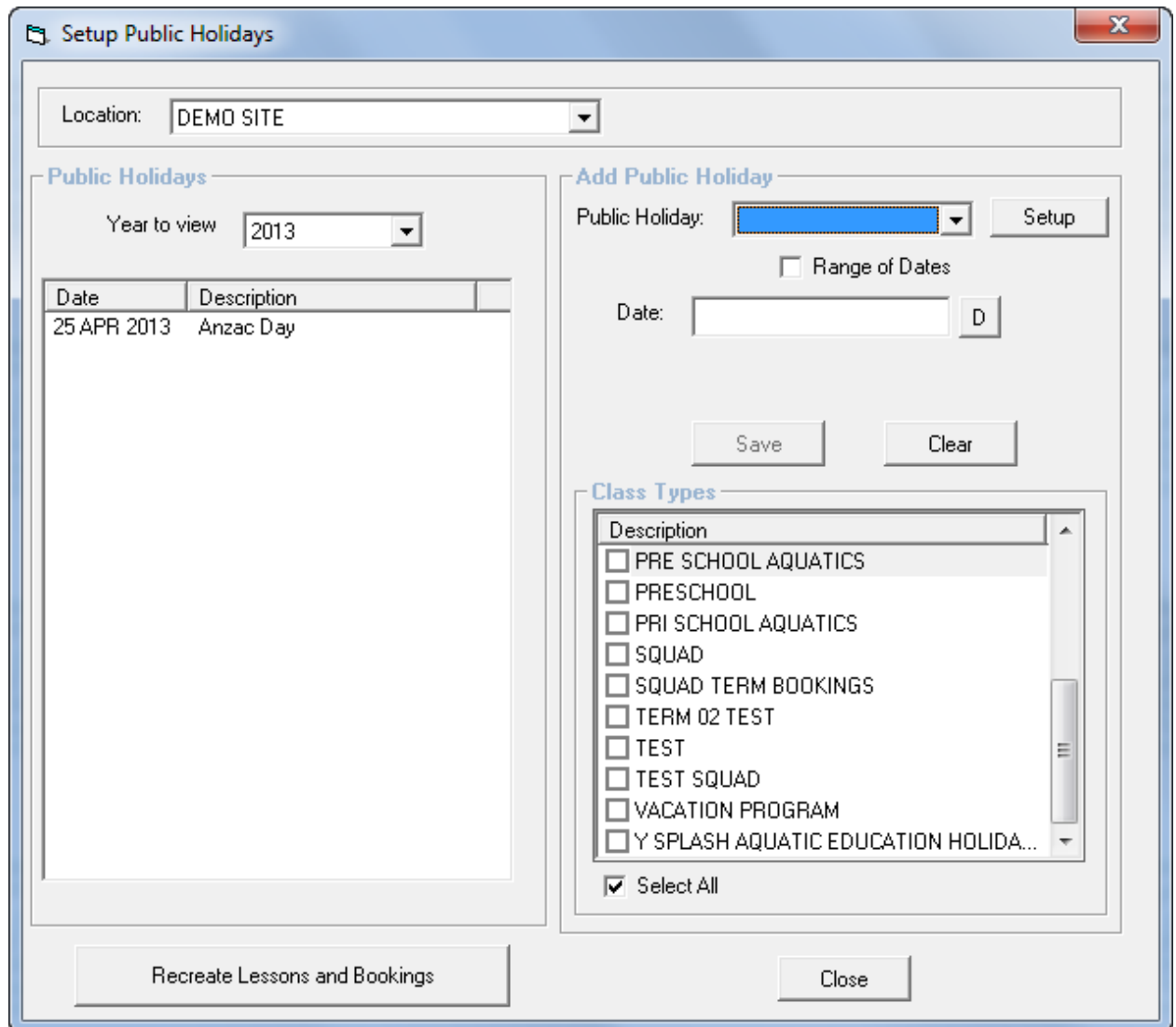
X indicates whether the card issued has been issued from Links or another source. This can be useful for those facilities needing to identify customers issued with non-Links cards in order to distribute Links cards to them.

In order to find a customer you can search using their card number, the person's name, the contract date or the expiry date

## Setup Public Holidays

Admin > Admin > Setup Public Holidays

This window allows Links to know when public holidays have been to set thereby providing flexibility when defining how public holidays are treated for bookings and direct debiting.




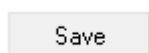
Year to view

Select the year from the . A list of Public Holidays currently set for the selected year will be displayed in the left screen

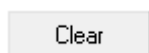
Add Public Holiday

Opens the Table Maintenance screen to enter new values for Public Holidays. For more information see Admin > Site > Table Maintenance

- Public Holiday Use the  to select the Public Holiday to add
- Range of Dates Tick this check box if the Public Holiday is to cover more than one day
- Date Enter the date the Public Holiday falls on, or Start and End dates if range of dates has been selected
- Class Types Select the Class Type that this Public Holiday will affect or select all to affect all Class Types




Add the Public Holiday to the list in the left screen



Clear the information entered

Note: If Lessons and Bookings are already scheduled prior to setting a Public Holiday date, lessons and bookings will be deleted by assigning the Public Holiday

Delete a Public Holiday

Highlight the public holiday you want to delete and click on the  to delete.

Note: Removing a Public Holiday can have a significant impact on Classes, Charges and Lesson Bookings



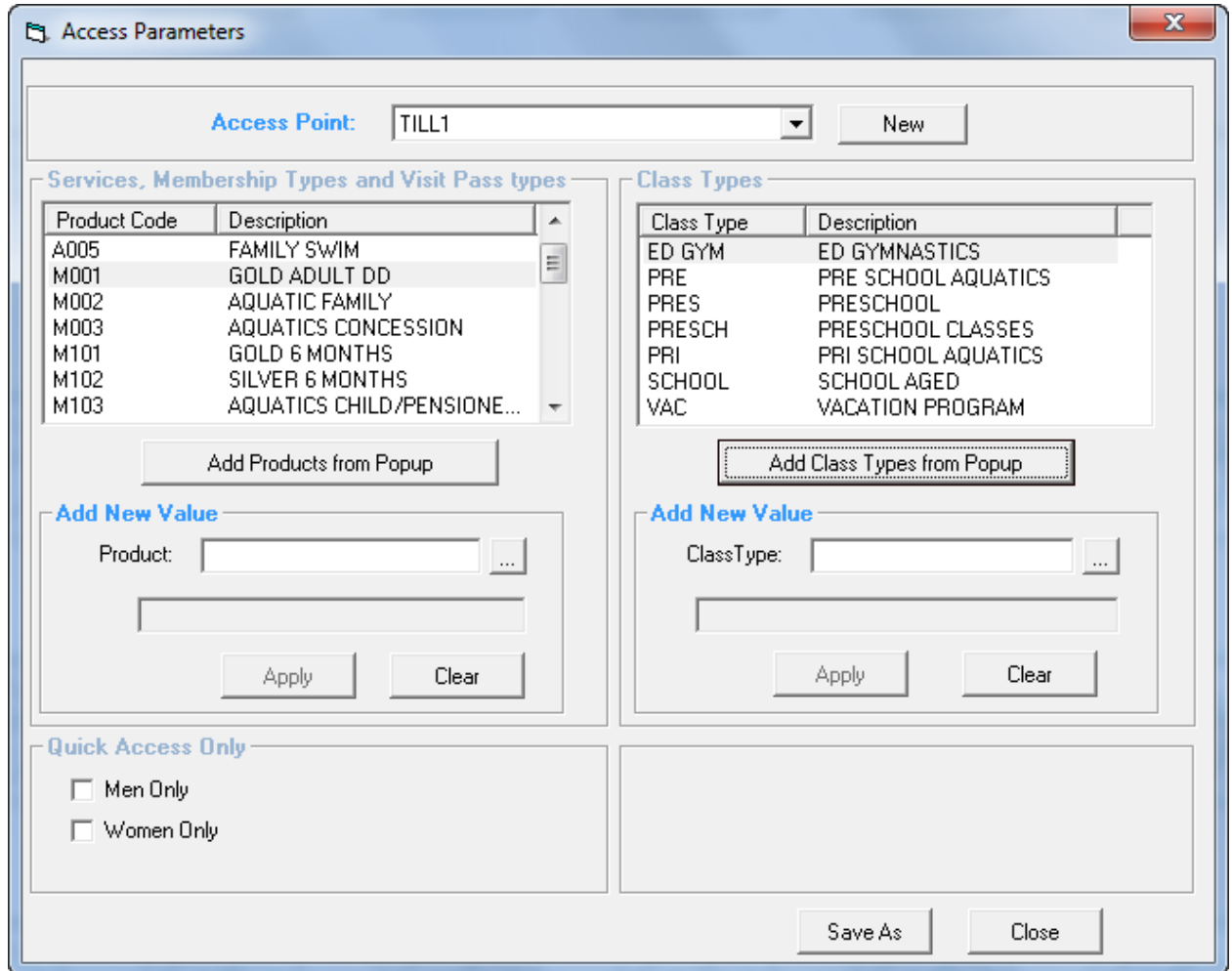
Once the Public Holiday has been deleted, you have the ability to recreate the lessons and bookings for that date

## Access Parameters

Admin > Admin > Access Parameters

The Access Parameters screen creates and defines access points for use by the Access Module for the control turnstiles and secondary scanning units.

Note: This screen will only be displayed if the Access Module has been installed on the PC that will be used for turnstile control.



**Access Point:** TILL1 New

Product Code	Description
A005	FAMILY SWIM
M001	GOLD ADULT DD
M002	AQUATIC FAMILY
M003	AQUATICS CONCESSION
M101	GOLD 6 MONTHS
M102	SILVER 6 MONTHS
M103	AQUATICS CHILD/PENSIONE...

Add Products from Popup

**Add New Value**

Product:  ...

Apply Clear

Class Type	Description
ED GYM	ED GYMNASTICS
PRE	PRE SCHOOL AQUATICS
PRES	PRESCHOOL
PRESCH	PRESCHOOL CLASSES
PRI	PRI SCHOOL AQUATICS
SCHOOL	SCHOOL AGED
VAC	VACATION PROGRAM

Add Class Types from Popup

**Add New Value**

ClassType:  ...

Apply Clear

**Quick Access Only**

Men Only

Women Only

Save As Close

Access Point

Use the  to select the Access Point for which to define permissions



To create a new Access Point, see Admin > Admin > Access Points

Services, Membership Types and Visit Pass Types/Class Types

Listed are the permissions currently allocated to this Access Point.

Add Products from Popup

Click this button to search for Services, Membership Types and Visit Pass Types to add to the permissions for this Access Point

Add Class Types from Popup

Click this button to search for Class Types to add to the permissions for this Access Point

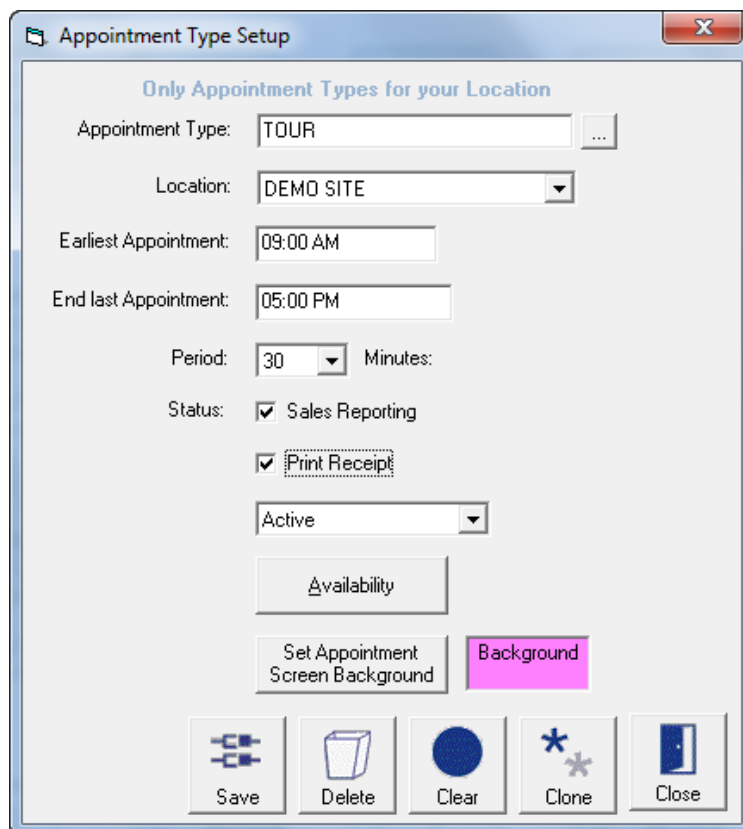
Quick Access Only

Select Men Only or Women Only if this Access Point is for areas of segregation, e.g. change rooms

### Appointment Type Setup

Admin > Admin > Appointment Type Setup

Links has a built in Appointment Calendar that allows for the recording and tracking of appointments for Members and Prospects. This screen allows for the creating and defining of Appointment Types and Parameters.



**Appointment Type Setup**

Only Appointment Types for your Location

Appointment Type: TOUR

Location: DEMO SITE

Earliest Appointment: 09:00 AM

End last Appointment: 05:00 PM

Period: 30 Minutes:

Status:  Sales Reporting  
 Print Receipt

Active

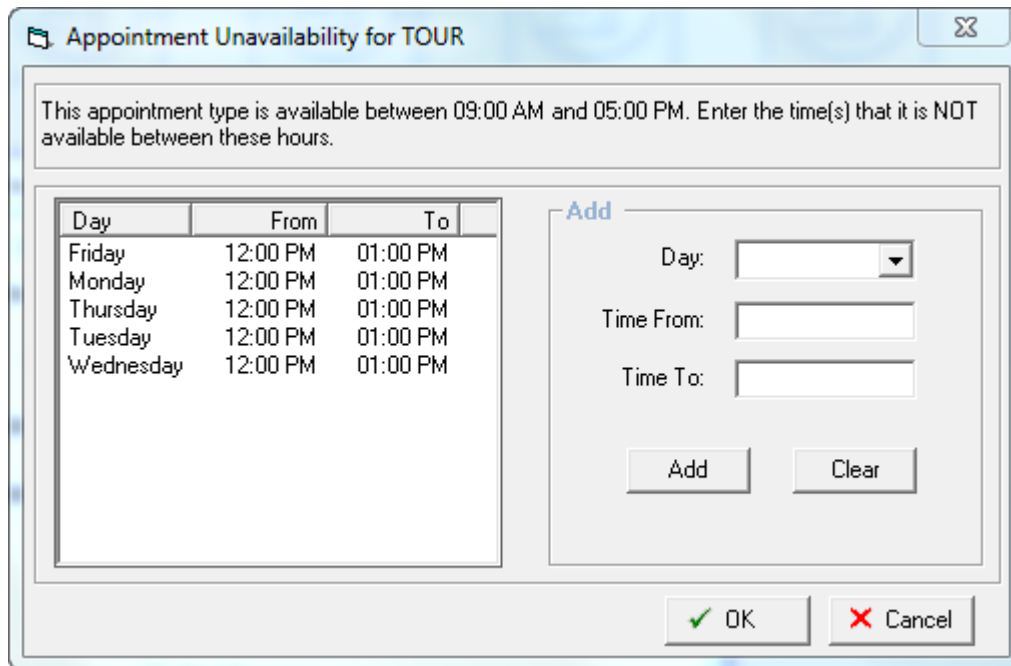
Availability

Set Appointment Screen Background Background

Save Delete Clear Clone Close

## Creating a New Appointment Type

- Appointment Type      Enter the name of the appointment type
- Earliest Appointment      Enter the time that the earliest appointment can be made
- End Last Appointment      Enter the time that the last appointment will end
- Period      Use the  to select booking time of the appointment in minutes
- Sales Reporting      Flag this option if you wish to use this appointment type as the tour appointment for sales reporting
- Set a colour for the appointment type
- Select this button if there is a need to define periods of time in which an appointment in this appointment type cannot be made



Appointment Unavailability for TOUR

This appointment type is available between 09:00 AM and 05:00 PM. Enter the time(s) that it is NOT available between these hours.

Day	From	To
Friday	12:00 PM	01:00 PM
Monday	12:00 PM	01:00 PM
Thursday	12:00 PM	01:00 PM
Tuesday	12:00 PM	01:00 PM
Wednesday	12:00 PM	01:00 PM

**Add**

Day:

Time From:

Time To:

Listed are the Days and Times that this Appointment Type is unavailable for bookings.

Add

Day      Enter the day of the week



Time From/To

Enter the time range required. Multiple time periods within a day can be entered if required

Add

Add this Day and Time period to the list of unavailability

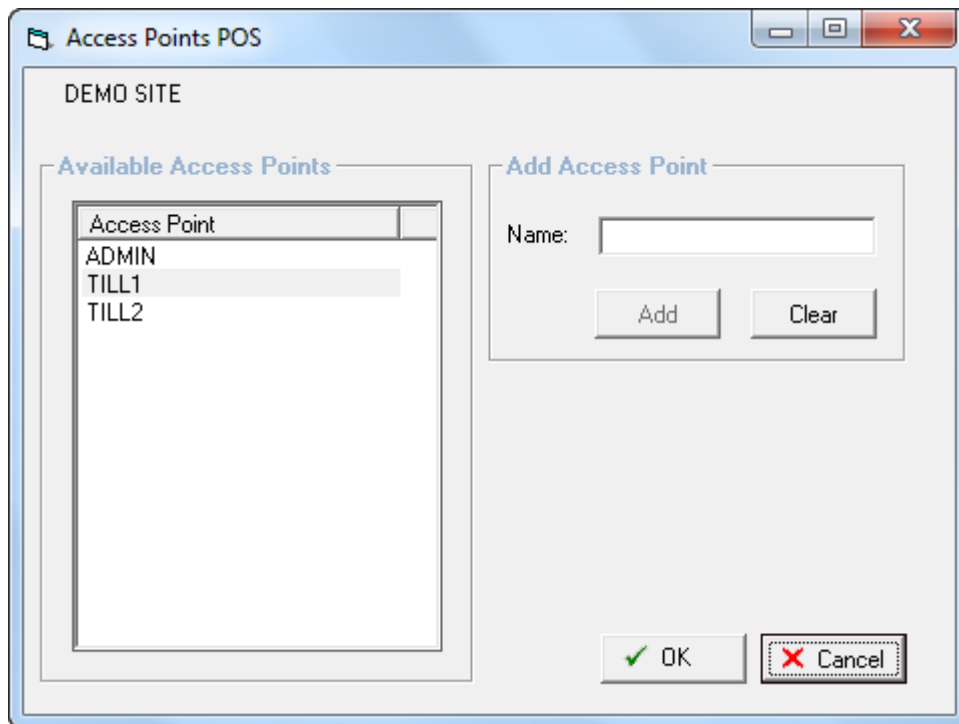
Clear

Clear the information entered

### Access Points

Admin > Admin > Access Points

Enter the Access Points that will be available for Access setup.



Access Points POS

DEMO SITE

Available Access Points

Access Point	
ADMIN	
TILL1	
TILL2	

Add Access Point

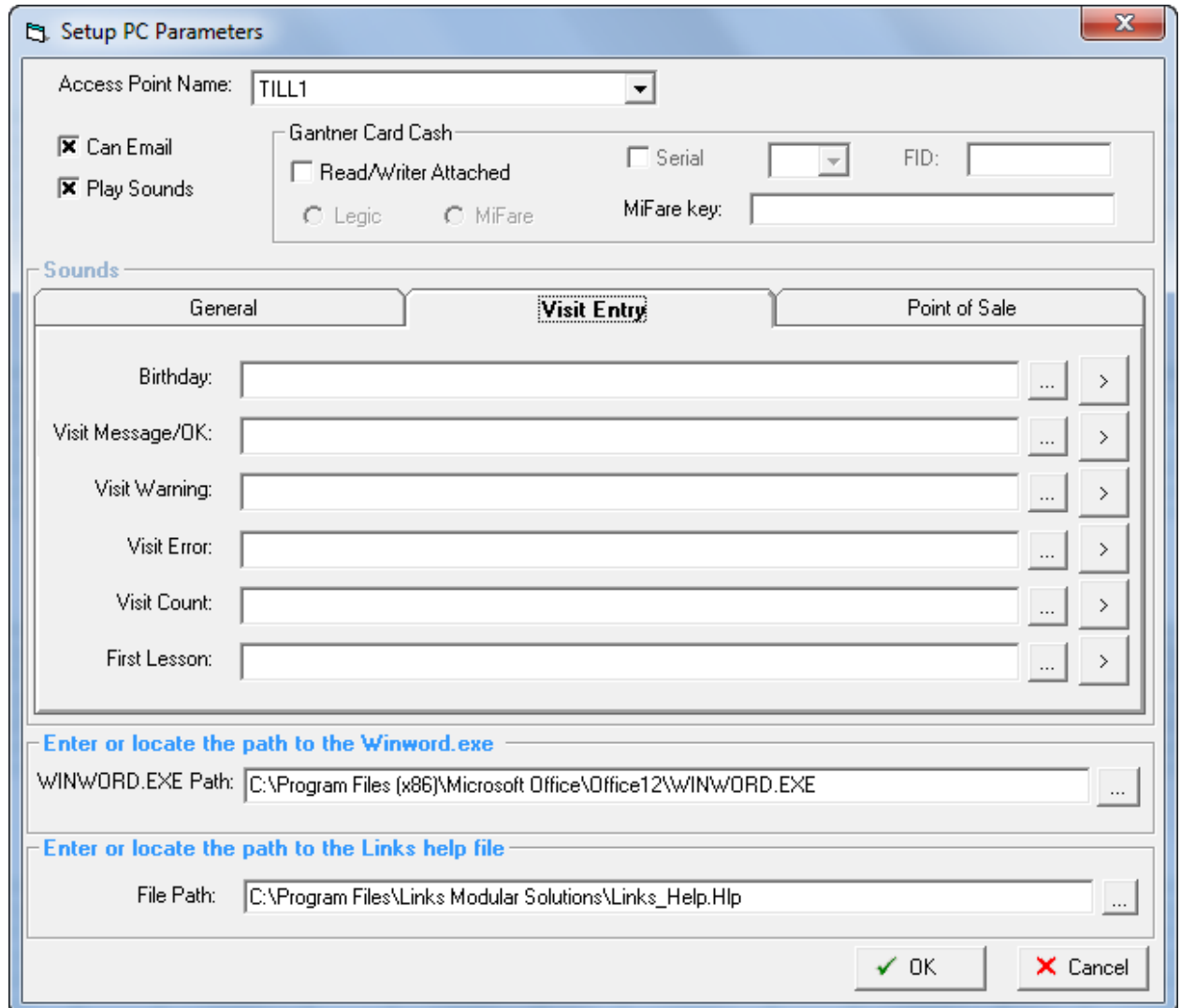
Name:

Add Clear

OK Cancel

## Admin > Setup PC

The Setup PC window is used to identify the Access Point Name and allocate sounds to actions for individual workstations that operate Links. This is a local setting only; therefore each workstation will require updating.



- |                   |   |
|-------------------|---|
| Access Point Name | Select from the <input type="button" value="v"/> options to identify the Access Point Name for the particular workstation |
| Can email         | Tick this check box to enable emails to be sent through Links from this PC  |
| Play Sounds       | Tick this check box to activate sound features for this PC  |



Enter or locate the path to the WINWORD.exe

Insert the path to the Microsoft Word executable file. This will be used to start Microsoft Word when using Links templates.

Enter or locate the path to the Links help file

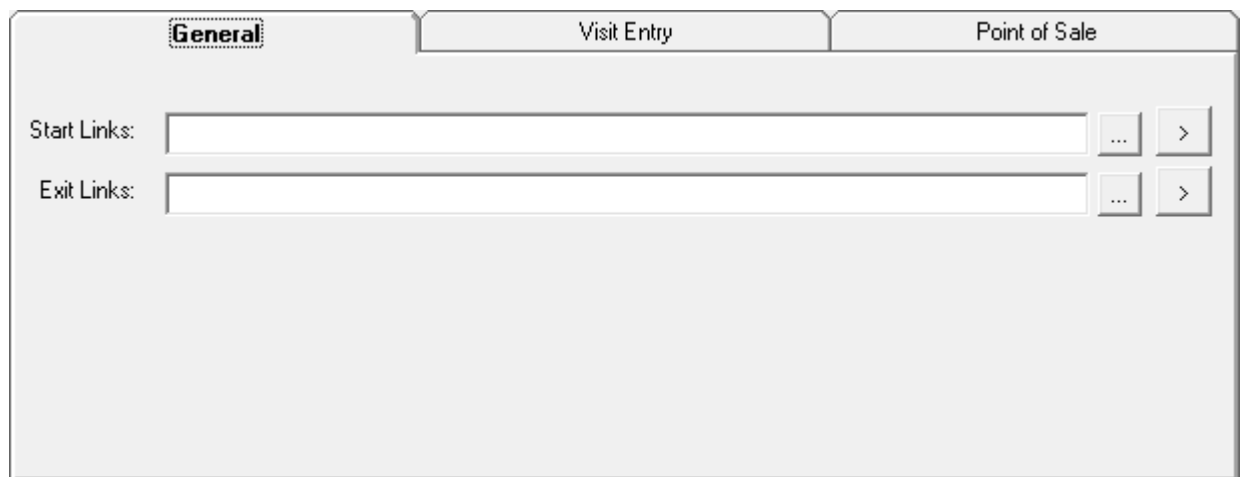
Please contact the Links Modular Solutions support team if the Links help file requires adjustment.

### Sounds

Each local workstation must have a soundcard and speakers in order to hear the sounds. The sound set up is entirely optional and only acts as an extra feature to the program. Sounds can be generated for various keystrokes as seen within this set up menu. Sound files must be Wave Files with sounds lasting only up to a few seconds at most.

If several workstations require sounds it is advantageous to locate the Wave Files at a central point of the server which is accessible by each workstation.

*Admin > Setup PC > General*



Start Links

This sound will be heard when starting Links.

To search for sounds click the  icon. Double click on the sound file.

Exit Links

This represents the sound you will hear when you log out of the main Links menu



Click on this icon to hear the sound once it has been imported

General	Visit Entry	Point of Sale
<p> <input type="text"/> <input type="button" value="..."/> <input type="button" value="&gt;"/> </p>		
<p> <input type="text"/> <input type="button" value="..."/> <input type="button" value="&gt;"/> </p>		
<p> <input type="text"/> <input type="button" value="..."/> <input type="button" value="&gt;"/> </p>		
<p> <input type="text"/> <input type="button" value="..."/> <input type="button" value="&gt;"/> </p>		
<p> <input type="text"/> <input type="button" value="..."/> <input type="button" value="&gt;"/> </p>		
<p> <input type="text"/> <input type="button" value="..."/> <input type="button" value="&gt;"/> </p>		

<p> <b>Birthday</b> </p>	<p>           This sound is played when you record a visit for either members or class enrolments through point of sale provided you have activated the 'Visit Entry Parameters'. See Admin &gt; Site &gt; Visit Parameters &gt; General         </p>
<p> <b>Visit Message/OK</b> </p>	<p>           This sound is played when a member or class enrolment visit is being recorded through point of sale or when a message appears for a customer         </p>
<p> <b>Visit Warning</b> </p>	<p>           This sound is played when a visit is recorded against a member or class enrolment that is due to expire or is not scheduled to visit at this time of entry or any customer who has an outstanding layby         </p>
<p> <b>Visit Error</b> </p>	<p>           This sound is played when you record a visit against a member or class enrolment that has expired or owes money         </p>
<p> <b>Visit Count</b> </p>	<p>           This sound is played when a customer accumulates the number of visits specified as under Access Parameters         </p>
<p> <b>First Lesson</b> </p>	<p>           This sound is played when a class enrolment visit is being recorded and the customer is a new enrolment attending for the first time         </p>

General	Visit Entry	Point of Sale
Touch Button Press: <input type="text"/> ... >		
Open Cash Drawer: <input type="text"/> ... >		

Touch Button Press

This represents the sound you will hear when you press any of the touch screen buttons at Point of Sale

Open Cash Draw

This represents the sound you will hear when the cash draw is opened after choosing a payment option or when choosing the 'No Sale' key

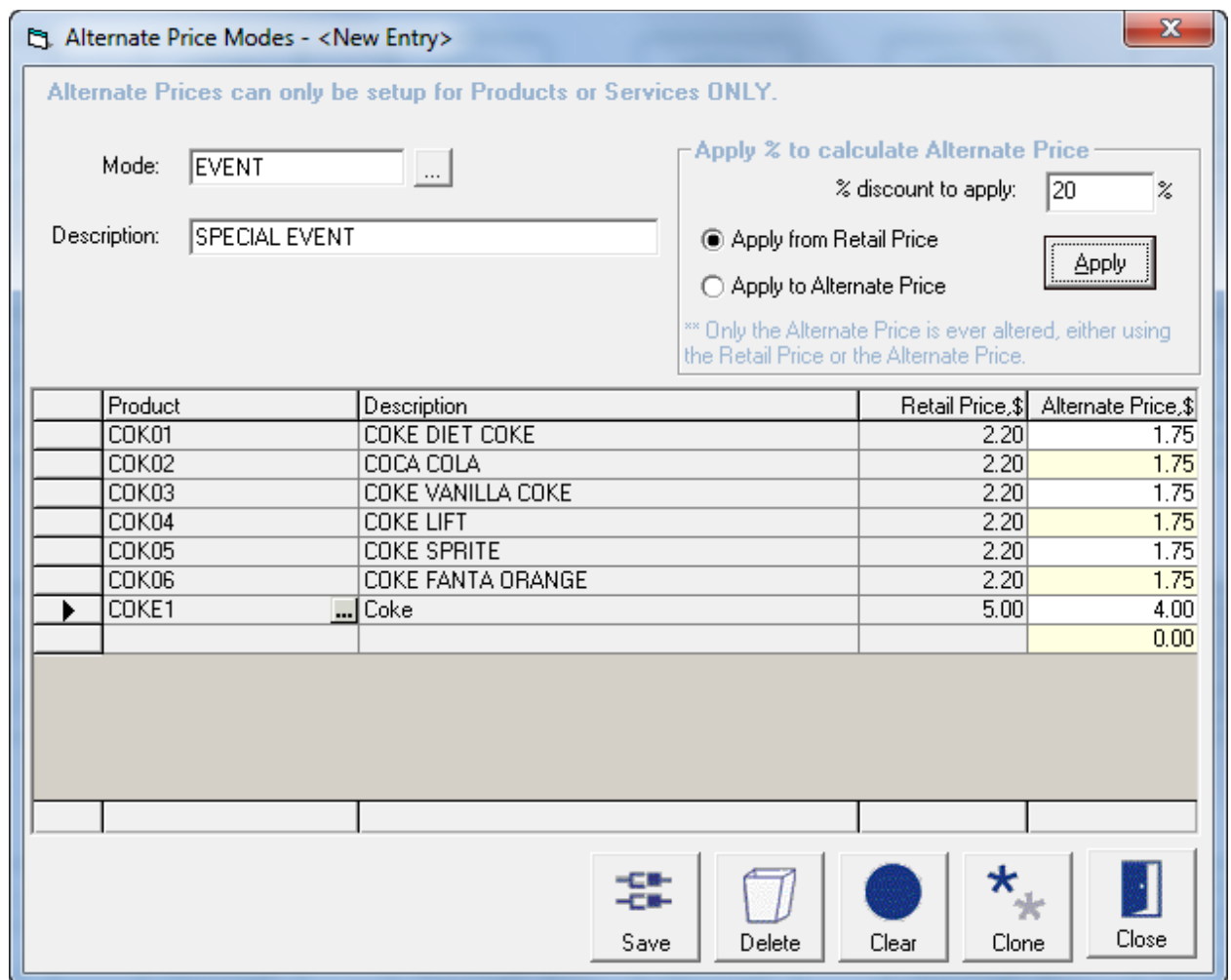
## Admin > POS

### Alternate Price Modes

Admin > POS > Alternate Price Modes

This window is used to run your point of sale in an alternate mode. You may want to sell certain services and products at different prices and at different times of the day, week or month. This window will allow you to nominate those services and products and allocate an alternate price.

To activate the alternate price mode functionality see POS.



Alternate Price Modes - <New Entry>

Alternate Prices can only be setup for Products or Services ONLY.

Mode:  ...

Description:

Apply % to calculate Alternate Price

% discount to apply:  %

Apply from Retail Price  Apply to Alternate Price

\*\*\* Only the Alternate Price is ever altered, either using the Retail Price or the Alternate Price.

Product	Description	Retail Price,\$	Alternate Price,\$
COK01	COKE DIET COKE	2.20	1.75
COK02	COCA COLA	2.20	1.75
COK03	COKE VANILLA COKE	2.20	1.75
COK04	COKE LIGHT	2.20	1.75
COK05	COKE SPRITE	2.20	1.75
COK06	COKE FANTA ORANGE	2.20	1.75
▶ COKE1	... Coke	5.00	4.00
			0.00

Save Delete Clear Clone Close

**Mode** If creating a new mode, type in a mode code. If amending/adding to an existing alternate mode, click on the  to retrieve the mode

**Description** Type in the description of the sale mode. If retrieving an existing mode the description will be displayed

## Select Products and Services


Before selecting products you will first need to set up your products and services. Refer to:

Admin > Products/Services > Products > Product Master

Admin > Products/Services > Services > Services Master

	Product	Description	Retail Price,\$	Alternate Price,\$
▶	...			

Search for services and products

Use the  to open the Search window. The options allow you to "Search by" Services or Products and by Code, Description, Supplier or Cost; or simply click "Show All".

To select the entire list, click "Select All"; To specify your selection, hold down the Ctrl button.

## Apply % to calculate Alternate Prices

% discount to apply      Enter the percentage discount to apply as the Alternate Price

Apply from Retail Price      Select this option to apply the % discount based on the Retail Price

Apply to Alternate Price      Select this option to apply the % discount to what is already set as the Alternate Price



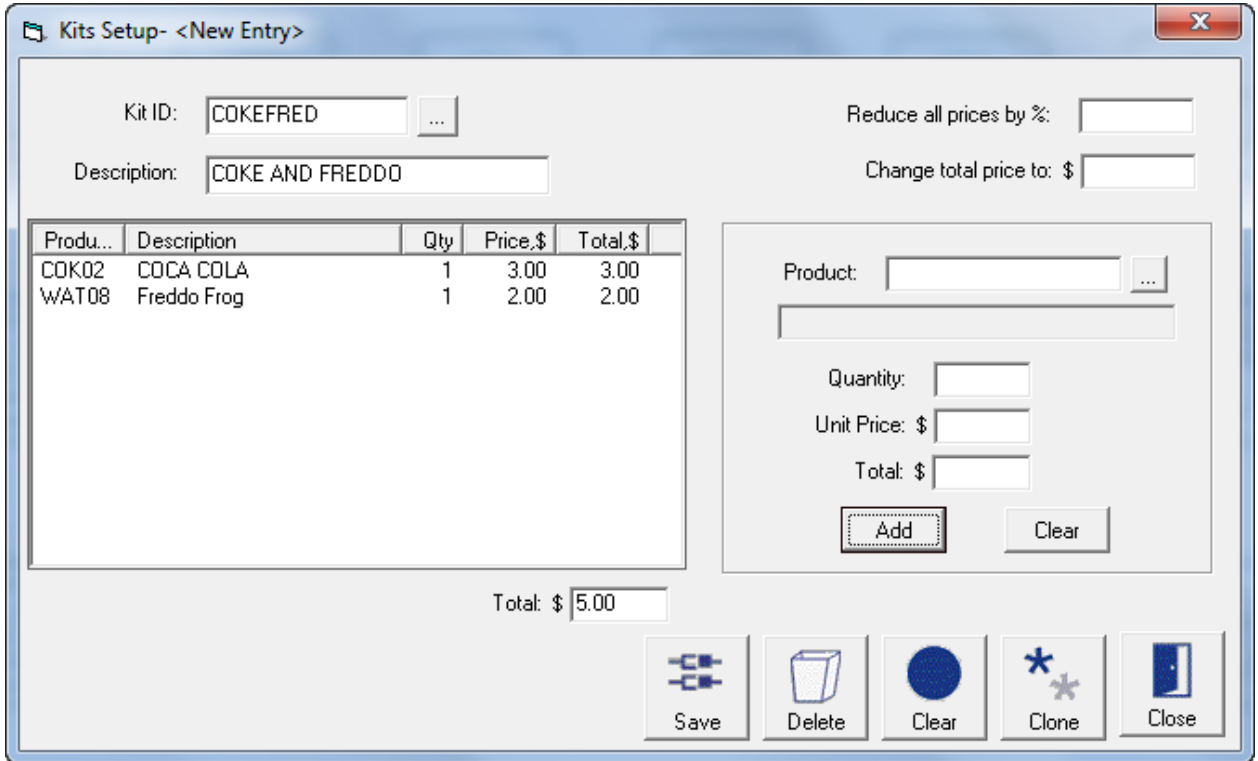
Will apply the specified % discount to the price selected for all Products and Services listed

Note: The Alternate Price can be manually entered for individual Products and Services by highlighting the appropriate box in the Alternate Price column.

## Kits

Admin > POS > Kits

Kits allow for multiple products to be grouped together for ease of sale. After the sale, stock numbers and financial updates will reflect each individual product within the Kit.



Produ...	Description	Qty	Price,\$	Total,\$
COK02	COCA COLA	1	3.00	3.00
WAT08	Freddo Frog	1	2.00	2.00

Total: \$ 5.00

Kit ID

Type in a Kit Id Code or click on the  icon to select an existing kit group

Description

Type in the description of the new kit. If an existing kit the description will automatically be displayed

Select a Product

Product

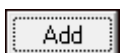
Click on the  icon to search for the product

Quantity

This field is used to determine the quantity of this product to be sold

Unit Price

Enter the Unit Price for the Product



Click on this icon to save this product to be part of the kit





Click on this icon to clear the product that has been chosen and not add it

Reduce all prices by %      Type in the % value you would like all items to reduce by. The 'price and total' will be changed to reflect the reduced % amount. Or leave this field blank if you do not wish to reduce prices

Change total price to      You also have the option of changing the total price of the kit if you desire. Simply type in the new overall price and the products chosen will be reduced evenly to add up to the new price

## Setup

Admin > POS > Setup

This screen allows for the activation or deactivation of functions within the Point of Sale Module. These settings are system wide therefore will affect all computers which operate as a Till.

*Admin > POS > Setup > General*

Point of Sale Options

**Point of Sale Options**

<input type="checkbox"/> Record cheque details	<input type="checkbox"/> Return\Refund is not permitted.
<input type="checkbox"/> Record credit card details	<input checked="" type="checkbox"/> Prompt for amount on sale of \$0 product
<input checked="" type="checkbox"/> Card type only required	<input checked="" type="checkbox"/> Visit pass free for sessions
<input type="checkbox"/> Validate credit card numbers	<input type="checkbox"/> Check for overdue facility bookings
<input checked="" type="checkbox"/> Ask for cash tendered	<input type="checkbox"/> Post Code survey
<input type="checkbox"/> Layby / Split defaults full amount in layby	<input type="checkbox"/> Include voucher total in balance
<input checked="" type="checkbox"/> Show product code on POS	<input type="checkbox"/> Allow users to change till ids
<input checked="" type="checkbox"/> Always ask for discount reason	

Record cheque details      This option allows you to record cheque details when choosing the cheque payment method

Record credit card details      Record the card details when choosing the credit card payment method at POS. The credit card details payment box includes, card type, card number, expiry date and cardholder name

Card type only required      Card Type is the only credit card detail required at POS

Validate credit card numbers	Validate the credit card details entered at POS
Ask for cash tendered	When cash payment method is selected, the user will be asked to enter the value received from the customer to help determine the change to be returned
Layby/Split defaults full amount in layby	The total transaction amount will default into the layby field after pressing the Layby/Split button in the Point of Sale screen
Show product code on POS	The product code and description of the current transaction is displayed when selecting an item in the Point of Sale screen
Always ask for discount reason	A discount reason will be mandatory when applying a discount to an item at Point of Sale
Return\Refund is not permitted	Deactivate the Return/Refund process within <b>POS</b>
Prompt for amount on sale of \$0 product	If making a sale for a product or service which has a \$0 value the system will ask for a value to be given against the item otherwise the sale cannot proceed
Visit pass free for sessions	If a member price is attached to a Session, then visit pass entries are excluded from this price. A visit will be taken from the Visit Pass
Check for overdue facility bookings	Pops up every two minutes if any bookings are overdue and have not been marked as attended. This is not advisable for a large venue
Post Code survey	Survey casual purchasers of products and services that are put through POS. The postcode screen will be displayed after the sale which will require reception staff to enter a postcode
Include voucher total in balance	The voucher total will be included within the till reconciliation report as well as on the display till window
Allow users to change till ID's	The Till ID selected for the PC can be changed by users

## Security Options

**Security Options**

Secure Tilloffs

Require user login for each transaction

Remember staff ID between sales

Require user login for Mem Contract sale.

Require personal details on all transactions

Require user login to open cash drawer

Require personal details on refund/return

Maximum Refund Without Security: \$

Secure Tilloffs	Allows users to till off to a set transactions number using either a manual cash enter or entry of denomination figures only i.e. 10x \$10.00 notes
Require user login for each transaction	All sales will be recorded against a staff person's user name. A report detailing sales by staff members can be generated
Remember staff ID between sales	Default Staff ID to that entered on previous transaction
Require user login for Mem Contract sale	All membership sales will require a staff ID and password to be entered before selling the membership
Require personal details on all transactions	Record details of customers for every transaction put through POS
Require user login to open cash drawer	Staff ID and password will be required to open the cash drawer
Require personal details on refund/return	When a refund or return is given on an item or previous transaction, you have the option of recording the personal details of the customer
Maximum refund without security	Maximum amount any user can refund without an administrator login

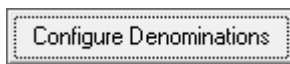
## Cash Rounding

Select the rounding options for cash sales processed through POS

**Cash Rounding**

Nearest 5 cents  
 Nearest 10 cents  
 Nearest 50 cents  
 Nearest dollar  
 Do not round cents

## Other



Setup the cash tenders for entry in Secure Tilloffs

**Setup Denominations**

Description	Value
\$100	\$100.00
\$50	\$50.00
\$20	\$20.00
\$10	\$10.00
\$5	\$5.00
\$2	\$2.00
\$1	\$1.00
50c	\$0.50
20c	\$0.20
10c	\$0.10
5c	\$0.05

New Denomination:

Description:

Value: \$

Admin > POS > Setup > Products

## Products

**Products**

Default GST:  %

Use Product Grouping  
 Use Product Comments  
 Use Product Keywords

**Product Keywords**

Keyword 1:

Keyword 2:

Keyword 3:

Default GST	Enter the GST percentage to be used
Use Product Grouping	Products, Services and Memberships can be grouped for ease of use in the POS touchscreen
Use Product Comments	Record comments against Product. The comments are not linked to any other functionality within Links
Use Product Keywords	A keyword can be used to identify or find products when utilising the search screen in POS
Product Keywords	Enter up to three new search fields (keywords)
POS Reports	
Show subtotals on transaction report	Subtotals will be printed on the transaction report when it is printed on a receipt printer
Show customers on transaction report	If collected, the customer's name will be printed against a transaction on the transaction report when it is printed on a receipt printer

*Admin > POS > Setup > Categories*

**Sales Category Types**

Category	Status	Req
FINANCIAL	Global	N
GENERAL LEDGER	Global	N
SALES	Global	N

Category:

**Status**

Global     Location Only

Required for all Products/Services

**Locations**

DANDENONG  
 DEMO SITE  
 LMS DEMO  
 MELBOURNE

Select All

## Sales Category Types

Listed are the Sales Category Types, their status – global or location specific, and whether required for all Products/Services.

Add a Sales Category Type

Category

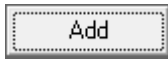
Enter the name of the Sales Category Type

Status

Specify is the Sales Category is to be used Globally (across all locations) or location specific

Required for all  
Products/Services

Is the Sales Category required for all Products/Services?



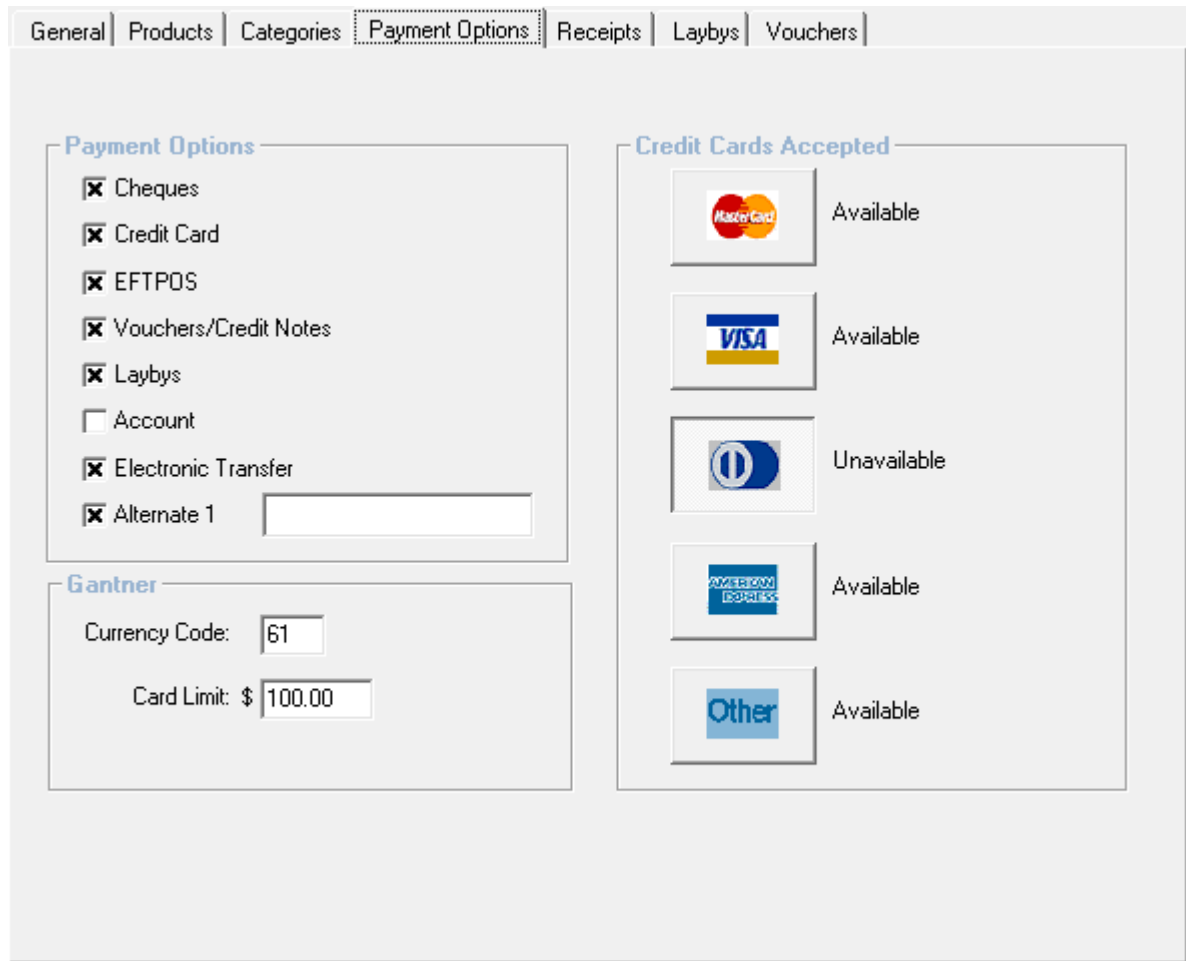
Add to the listed Sales Categories



Clear the information entered

Locations

If the Sales Category is to be location specific, tick the appropriate location



### Payment Options

Select the Payment Methods to be available.

Note: If Alternate 1 is selected it can be used in POS by selecting the Layby/Split button.

### Credit Cards Accepted

Click the Credit Card Type buttons to make it unavailable

### Gantner

Currency Code                      Enter the appropriate currency code for the region of operation

Card Limit                              This is old functionality that is no longer used

Admin > POS > Setup > Receipts

**Printing Options**

- WAS detail on sale items
- Two receipts on layby sale
- Two receipts on voucher sale
- Two receipts on credit note
- Receipt on every transaction
- Salesperson first name
- Signature lines on vouchers
- Signature lines/terms on layby payments
- Print signature on refunds always
- Print two receipts for CC/EFTPOS

WAS Detail On Sale Items	If a discount is given to a sale, the 'WAS' price and the 'NOW' sale price will appear on the receipt
Two Receipts on Layby Sale	A second receipt will be printed on all layby sales, allowing you to have a copy for the customer and yourself
Two Receipts on Voucher Sale	A second receipt will be printed on all voucher sales, allowing you to have a copy for the customer and yourself
Two Receipts on Credit Note	A second receipt will be printed on all credit note sales, allowing you to have a copy for the customer and yourself
Receipt on Every Transaction	A receipt will be printed on every transaction
Salesperson First Name	The salespersons name will be printed on the receipt The system will assume the salesperson is the user who logged onto the system unless you have flagged the 'Security Option' as explained above
Signature Lines On Vouchers	The voucher receipts will have a section designated for the customers signature
Signature Lines/ Terms on Layby Payments	The layby receipt automatically print two signature lines and incorporate the free text from the 'Layby Terms' box





Print signature on  
refunds always

The refund receipt will automatically print two signature lines

Print two receipts for  
CC/EFTPOS

A second receipt will be printed on all CC/EFTPOS sales, allowing  
you to have a copy for the customer and yourself

*Admin > POS > Setup > Laybys*

The screenshot shows two sections of a software interface. The top section is titled "Minimum Initial Layby Payment" and contains two input fields: "At least: \$ 10.00" and "or: 0 % of total sale value". The bottom section is titled "Default Layby Payment Schedule" and shows "10% every 7 days" with "Change" and "Clear" buttons below it.

Minimum Initial Layby Payment

At least \$

Set a minimum value amount for the Initial Layby Payment

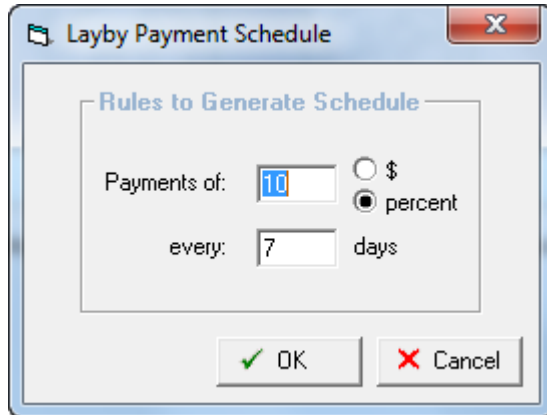
or % of total sale value

Specify a percentage of total sale value as the minimum Initial Layby Payment

The minimal initial layby payment can be both \$ and % or one of these options. The minimum amount must be paid otherwise the transaction cannot proceed.

## Default Layby Payment Schedule

The default Layby payment schedule is outlined. Click  to alter the default payment schedule



Payments of ...

Specify the minimum amount (value or percentage) that must be paid per period of the payment schedule

Every ... days

Specify the number of days between payment for this payment schedule

It should be noted that these act as a guide. Any payment amount for the layby will be accepted but the payment schedule for further payments will need to be recalculated at the time of the payment.

Admin > POS > Setup > Vouchers

This tab will allow the system to automatically generate the next available voucher/credit note number to be applied

Automatic voucher/credit note numbering

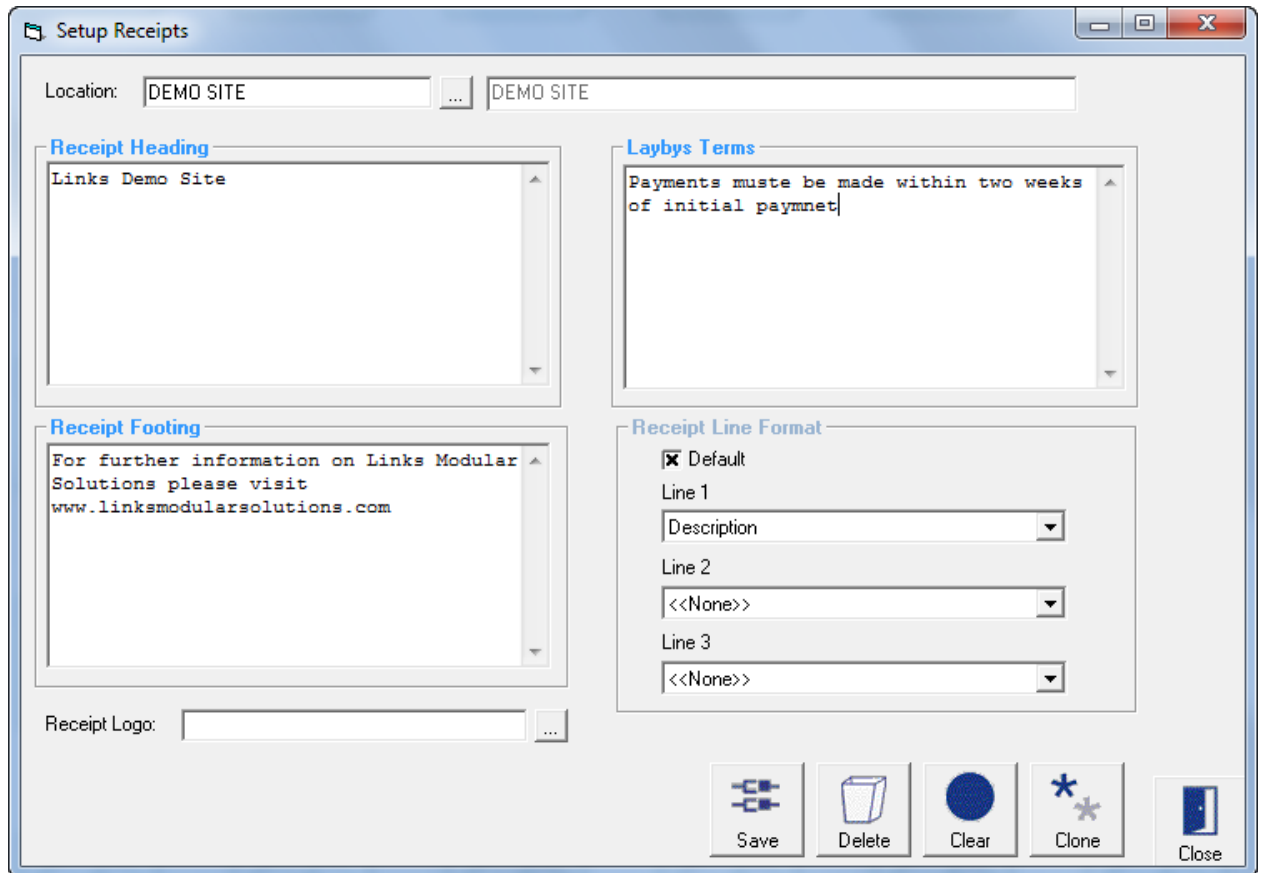
Gift Voucher Number Range	Credit Note Number Range
Lower: <input type="text" value="100000"/>	Lower: <input type="text" value="200000"/>
Upper: <input type="text" value="199999"/>	Upper: <input type="text" value="299999"/>

Automatic voucher/credit note numbering

Flag this box if you want POS to automatically default to the next available number as per the range you enter. You will need to enter the lower and upper number range for both vouchers and credit notes. Numbers cannot overlap each other

### Setup Receipts

Admin > POS > Setup Receipts



The screenshot shows the 'Setup Receipts' window with the following fields and options:

- Location:** DEMO SITE
- Receipt Heading:** Links Demo Site
- Laybys Terms:** Payments must be made within two weeks of initial paymnet
- Receipt Footing:** For further information on Links Modular Solutions please visit www.linksmodularsolutions.com
- Receipt Line Format:**
  - Default
  - Line 1: Description
  - Line 2: <<None>>
  - Line 3: <<None>>
- Receipt Logo:** (Empty field)
- Buttons:** Save, Delete, Clear, Clone, Close



### Receipt Heading

Type in what you would like to appear on the top of your receipt.


### Receipt Footing

Type in what you would like to appear on the bottom of your receipt.


### Layby Terms

Type in any text you would like to appear on your receipt regarding terms and conditions for laybys. This will only be printed on the receipt when a layby is sold and if selected as a printing option.

### Receipt Line Format

- |               |  |
|---------------|--|
| Default       | If flagging the default the receipt will automatically print the first line option being the product description   |
| Line 1, 2 & 3 | If you do not want the automatic default you can choose from the list of options on the pop up. Click on the  for the list of options |

### Receipt Logo

A logo can be set to print on the receipts. Locate a network file using the  option.

Note: This file must be in a network drive that is accessible to all PCs.

## Template Models

Admin > POS > Invoicing > Template Models

This screen defines the template model and the fields which will be inserted into the template. There are two invoice models that can be designed: Customer and Client.

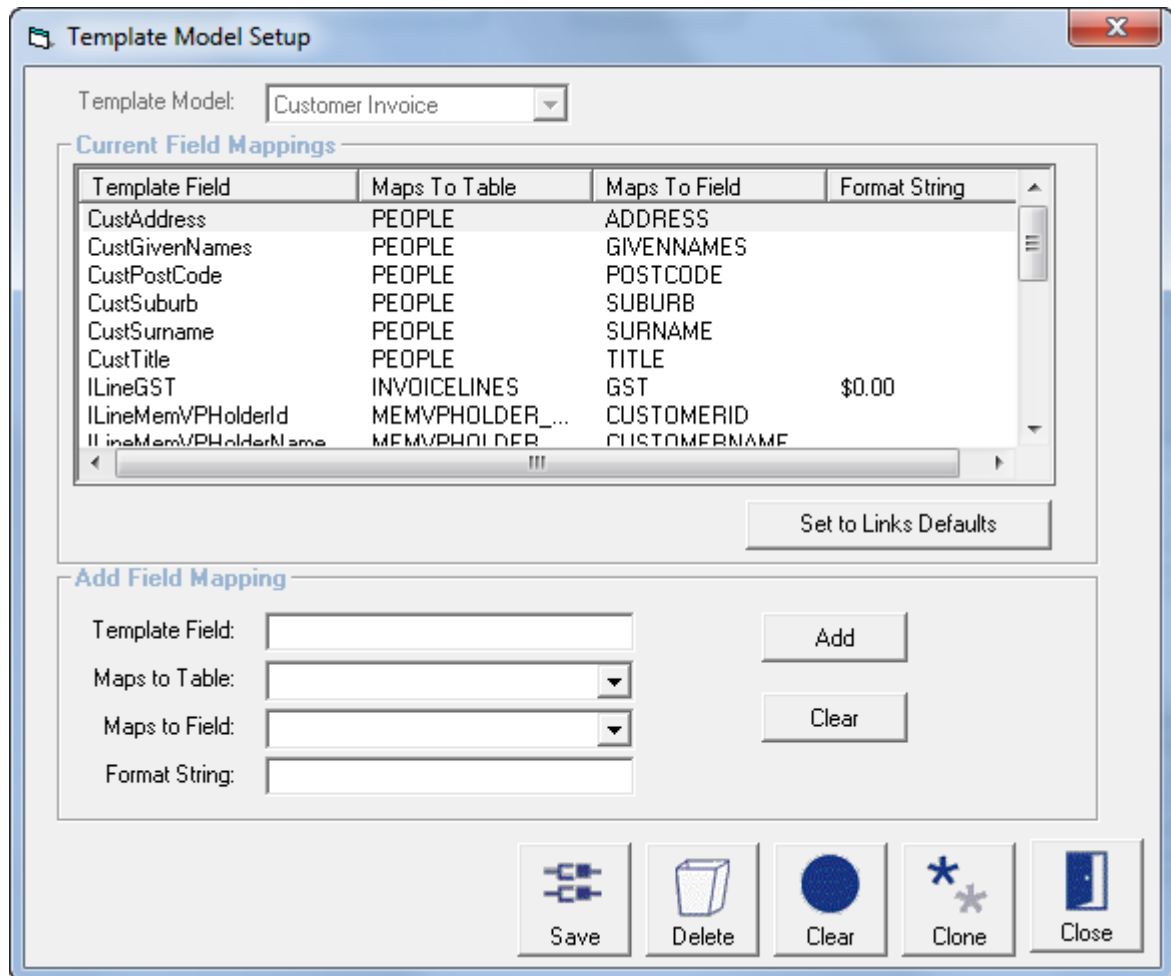
A Customer is defined as a person who has been issued a customer number within Links. This customer may be a staff member, student, responsible person etc.

A Client is defined as a separate entity outside of customer process and is setup utilising the Client screen in POS.

Note: The invoicing system within Links operates on an Accrual basis. This means that the income value of the products, services, memberships and visit passes that are sold on account will be viewed as income generated on the day they are sold, therefore income reports will include this amount. Accordingly any product will see a reduction in stock numbers and GST will be payable on the amount.

## Establishing an Invoice Template Model

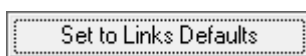
This screen establishes the fields which will be inserted into the template.



Template Field	Maps To Table	Maps To Field	Format String
CustAddress	PEOPLE	ADDRESS	
CustGivenNames	PEOPLE	GIVENNAMES	
CustPostCode	PEOPLE	POSTCODE	
CustSuburb	PEOPLE	SUBURB	
CustSurname	PEOPLE	SURNAME	
CustTitle	PEOPLE	TITLE	
ILineGST	INVOICELINES	GST	\$0.00
ILineMemVPHolderId	MEMVPHOLDER_...	CUSTOMERID	
ILineMemVPHolderName	MEMVPHOLDER	CUSTOMERNAME	

Template Model

Select Customer or Client Invoice from the drop down menu



Press the links default button and the default template fields will be displayed. These are the template fields which will be inserted into the invoice template

Add Field Mapping

Additional fields can be added to the default fields however you must know the location of the information you are seeking

Template Field

Type in your own field name to identify the field type

Maps to Table

From the drop down menu select the Table that contains the necessary information

Maps to Field From the drop down menu select the field that has the necessary information

Format String Insert the format in which the data will be displayed



Click to add the entered information to the list of fields

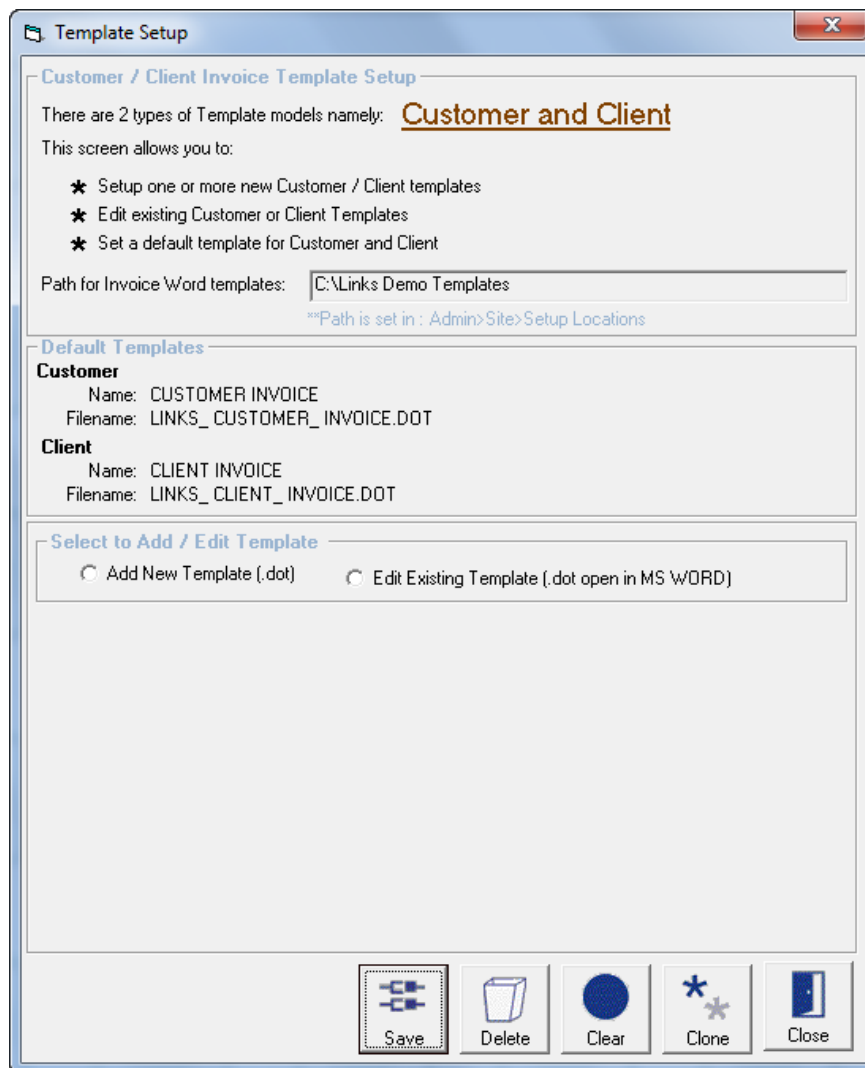


Click to clear the entered information

## Templates

Admin > POS > Invoicing > Templates

The Template Setup screen allows you to setup one or more new Customer and Client templates, edit existing Customer or Client templates and set a default template for Customer and Client.



The screenshot shows the 'Template Setup' window with the following sections:

- Customer / Client Invoice Template Setup**
  - There are 2 types of Template models namely: **Customer and Client**
  - This screen allows you to:
    - ★ Setup one or more new Customer / Client templates
    - ★ Edit existing Customer or Client Templates
    - ★ Set a default template for Customer and Client
  - Path for Invoice Word templates: 

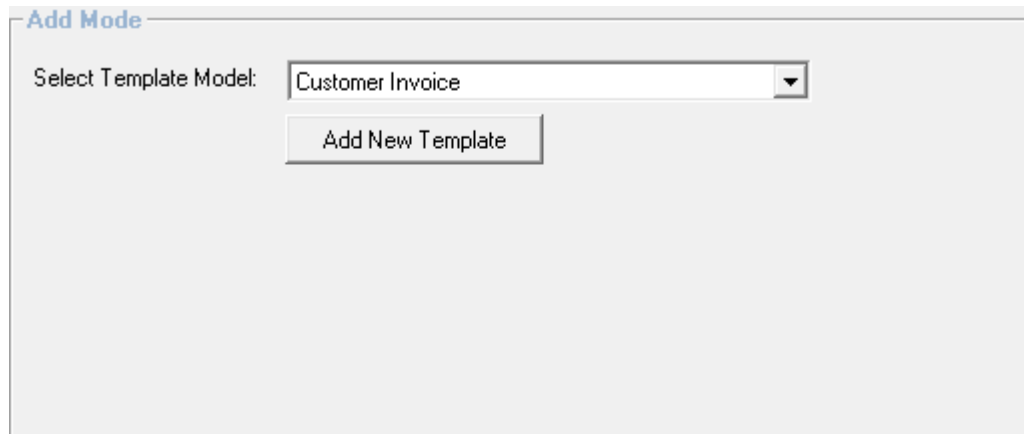
\*\*Path is set in : Admin>Site>Setup Locations
- Default Templates**
  - Customer**
    - Name: CUSTOMER INVOICE
    - Filename: LINKS\_CUSTOMER\_INVOICE.DOT
  - Client**
    - Name: CLIENT INVOICE
    - Filename: LINKS\_CLIENT\_INVOICE.DOT
- Select to Add / Edit Template**
  - Add New Template (.dot)
  - Edit Existing Template (.dot open in MS WORD)

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

## Default Templates

Displayed are the default Customer and Client Invoice Templates

## Add New Template

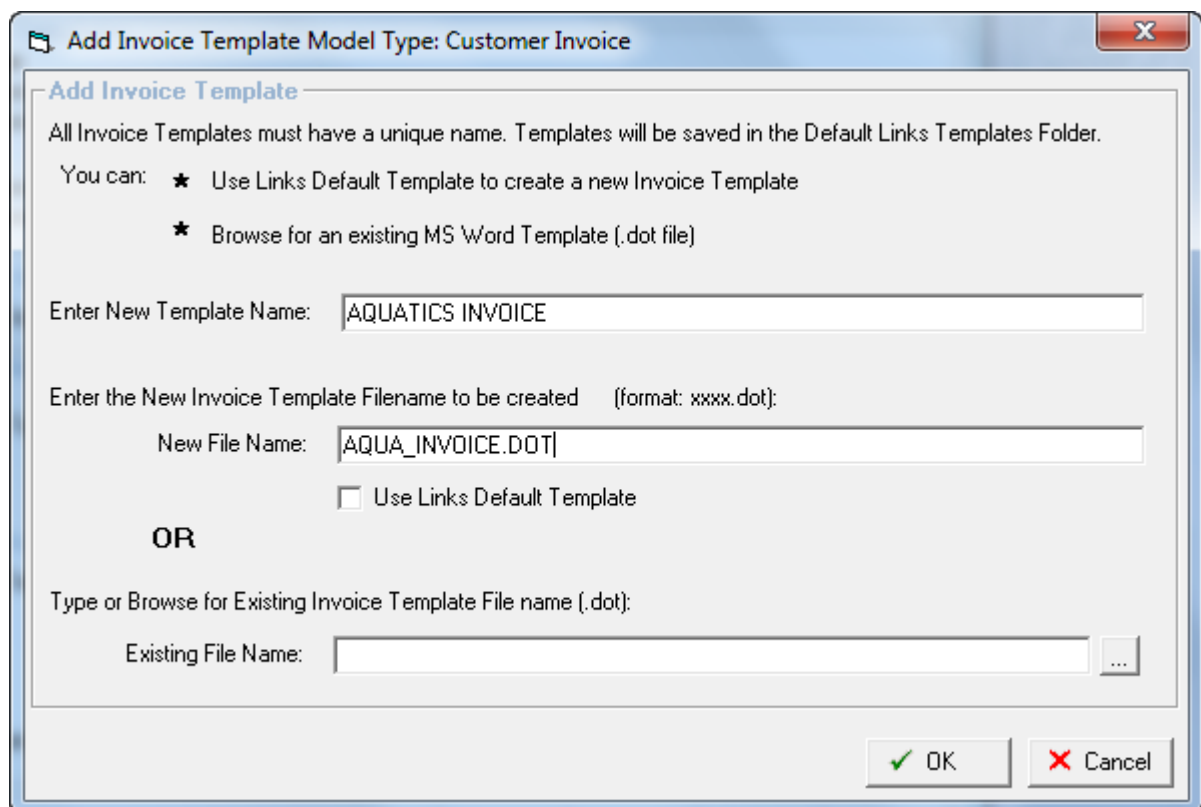


Select Template Model

Select between the Customer or Client invoice Template Models



Opens the Add Invoice Template screen to enter a New Template Name and File name or selecting an Existing File name as follows



Enter New Template Name

Type in a template name

Enter the New Invoice Template Filename to be created

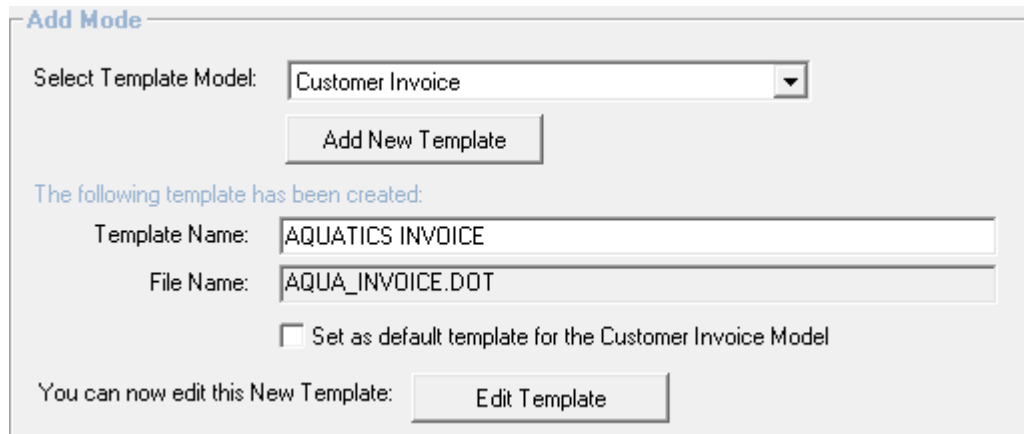
Type in a filename in the format xxx.dot

Use Links Default Template

Will specify the file name as either LINKS\_CUSTOMER\_INVOICE.DOT or LINKS\_CLIENT\_INVOICE.DOT

Type or Browse for Existing Invoice Template File name

Type in or search for an existing template



Template Name

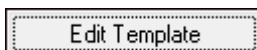
Displayed is the predefined template name

File Name

Displayed is the predefined file name

Set as default template for the Customer Invoice Model

Select the Set as a Default Template for the Model if this template is to be used as the Default template for all letters that use this model



The template can be modified to suit your requirements



## Edit Existing Template

**Edit Mode**

Select Template Model:

Browse for the Existing Template to Edit

Template Name:


File Name:

Set as default template for the Customer Invoice Model

Select Template Model

Select between the Customer or Client invoice Template Models

Template Name

Use the  to search the Customer or Client Invoice Template to edit

File Name

The File Name will automatically update when the Template Name has been selected

Set as default template for the Customer Invoice Model

Select the Set as a Default Template for the Model if this template is to be used as the Default template for all letters that use this model



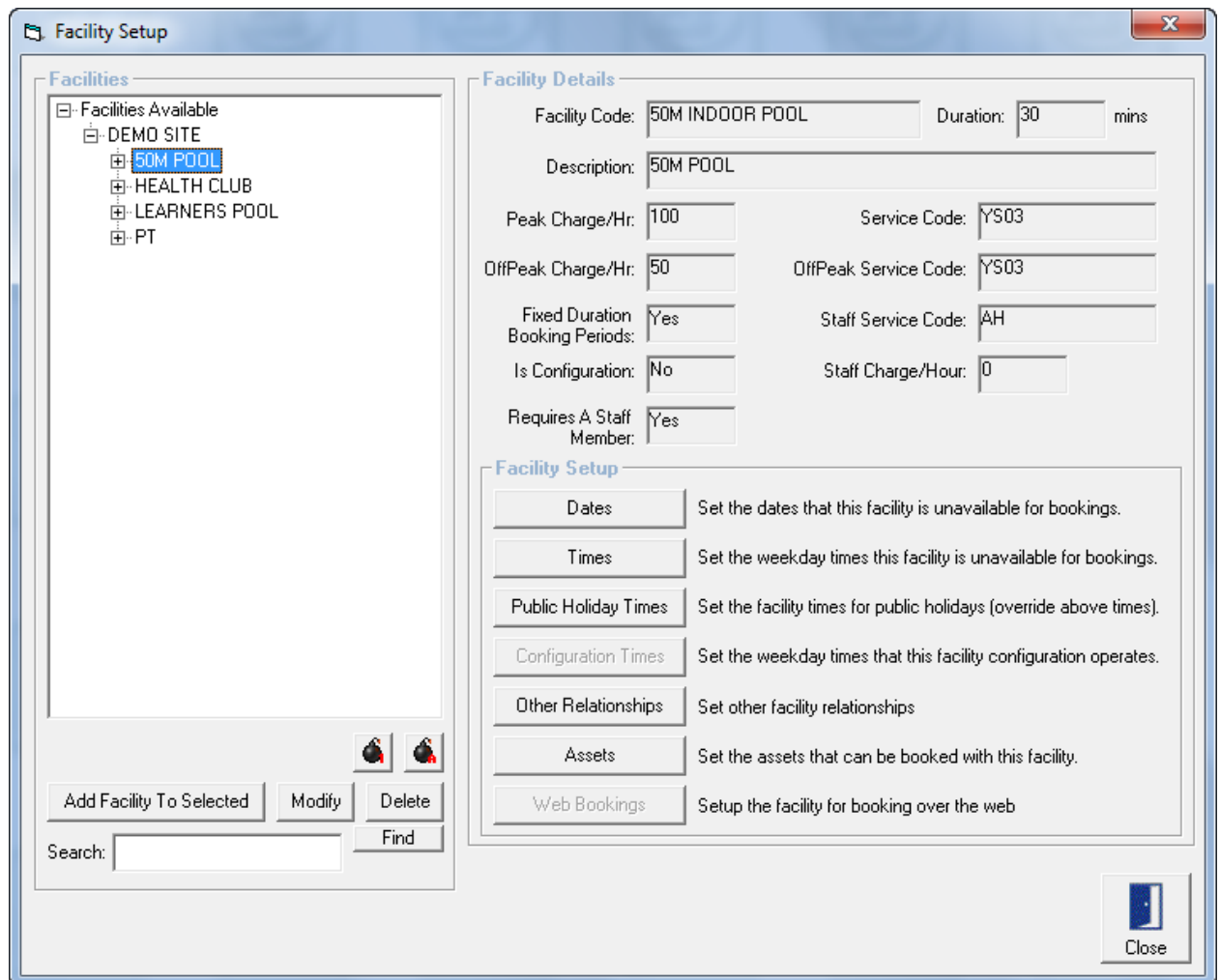
The template can be modified to suit your requirements

## Admin > Facility

This function allows you to manage the various sections of your facility that are available for hiring. Once specifying the rate and dates and times available, bookings can then be made through Point of Sale.

### Setup Facilities

Admin > Facility > Set up Facilities



### Facilities

The preview pane on the left details the various segments listed for this particular location. Parent groups are listed and facilities that are part of the parent group can be viewed by clicking the +.

Below the preview pane are two bombs.



Expands the directory tree in the preview pane



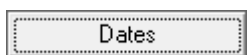
Contracts the directory tree in the preview pane

### Facility Details

Displayed is a summary of the details entered in the "Add/Modify Facility" screen – see Admin > Facilities > Setup Facilities > Add Facility

Facility Code	The code name by which the facility is displayed
Description	Describes the facility in more detail
Duration	How many minutes duration the facility can be booked at a time
Peak Charge/Hr	The cost per hour during periods defined as Peak
Off Peak Charge/Hr	The cost per hour during periods defined as Off Peak
Fixed Duration Booking Periods	Is the period for which facility is hired out for a set period or can it flexible?
Is Configuration	Is this Facility a Configuration of another facility?
Requires a Staff Member	Is a staff member required when this facility is hired out?
Service Code	Service code for Peak Charge. Relates directly to the recording of income for reporting purposes. See Admin > Products/Services > Services (> Services Master if a Multi Location site)
Off Peak Service Code	Service code for Off Peak Charge.
Staff Service Code	Service code directly relating to the cost of hiring the staff member out with the facility
Staff Charge/Hr	The cost of the staff member per hour to attend with the facility

### Facility Setup



Insert the dates the facility is unavailable/available for bookings

Times

Insert the times the facility is Peak/Off Peak/Unavailable for bookings

Public Holiday Times

Specify the public holidays times the facility is Unavailable/available

Configuration Times

Specify the times that this Configuration of the facility is unavailable/available if the facility being added is a configuration of another facility

Other Relationships

Set other facility relationships

Assets

Set the assets that can be booked with this facility

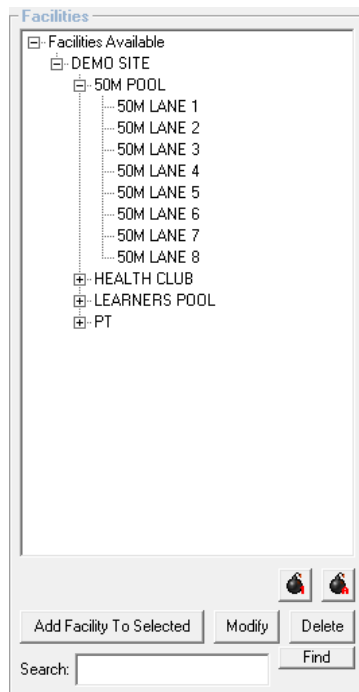
Web Bookings




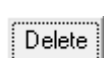
Setup the facility for bookings over the web

*Admin > Facilities > Setup Facilities > Add Facility*

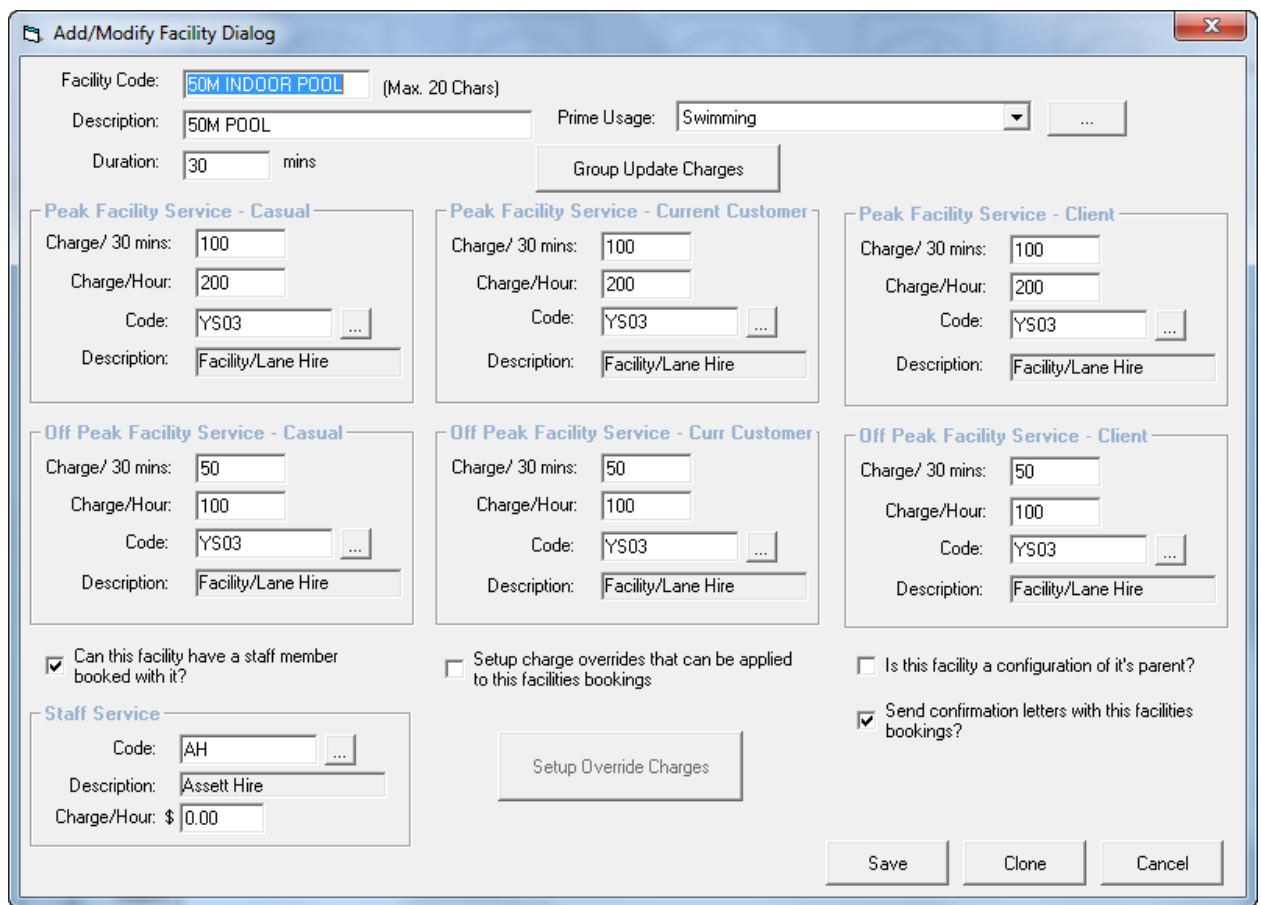
Prior to setting up a Facility, the facility service code, staff service code and charge override service code must already be entered. See Admin > Products/Services > Services (> Services Master if a Multi Location site).

1. Select the part of the centre you wish to add another facility



-  Only available when highest Parent Facility in tree is selected
-  Add another Facility to the Parent Facility selected
-  Change the details of the selected Facility
-  Delete the selected Facility

## 2. Define the Facility Details



The screenshot shows the 'Add/Modify Facility Dialog' window. It contains the following fields and options:

- Facility Code:** 50M INDOOR POOL (Max. 20 Chars)
- Description:** 50M POOL
- Duration:** 30 mins
- Prime Usage:** Swimming
- Group Update Charges:** Button
- Peak Facility Service - Casual:** Charge/ 30 mins: 100, Charge/Hour: 200, Code: YS03, Description: Facility/Lane Hire
- Peak Facility Service - Current Customer:** Charge/ 30 mins: 100, Charge/Hour: 200, Code: YS03, Description: Facility/Lane Hire
- Peak Facility Service - Client:** Charge/ 30 mins: 100, Charge/Hour: 200, Code: YS03, Description: Facility/Lane Hire
- Off Peak Facility Service - Casual:** Charge/ 30 mins: 50, Charge/Hour: 100, Code: YS03, Description: Facility/Lane Hire
- Off Peak Facility Service - Curr Customer:** Charge/ 30 mins: 50, Charge/Hour: 100, Code: YS03, Description: Facility/Lane Hire
- Off Peak Facility Service - Client:** Charge/ 30 mins: 50, Charge/Hour: 100, Code: YS03, Description: Facility/Lane Hire
- 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:** Code: AH, Description: Assett Hire, Charge/Hour: \$ 0.00
- Setup Override Charges:** Button
- Buttons:** Save, Clone, Cancel

- Facility Code** The code name by which the facility is displayed
- Description** Describes the facility in more detail
- Duration** How many minutes duration the facility can be booked at a time

Prime Usage

Use the  to select established Facility Prime Uses or the  to edit in the Table Maintenance options



When modifying a Facility, the "Charge/Duration", "Charge/Hour" and "Service Code" can be updated by group for Peak – Casual, Current Customer, Client; and Off Peak – Casual, Current Customer, Client.

Facility Service

Peak

The Facility Service details will apply when making a booking during periods defined as Peak under Facility Setup > Times

Off Peak

The Facility Service details will apply when making a booking during periods defined as Off Peak under Facility Setup > Times

Casual

The Facility Service details will apply when a Casual user makes a Facility Booking

Customer

The Facility Service details will apply when a Customer makes a Facility Booking

Client

The Facility Service details will apply when a Client makes a Facility Booking

Charge/Duration

The Cost per period defined under "Duration" above. Note: this field will update if "Charge/Hour" is adjusted

Charge/Hour

The Cost per hour. Note: this field will update if "Charge/Duration" is adjusted

Code

The Service Code Relates directly to the recording of income for reporting purposes. See Admin > Products/Services > Services > Services Master

Description

Description will display when the Service Code is entered

## Staff Member

Can this facility have a staff member booked with it

Enables a Staff Member to be booked as part of the Facility Booking

Code

Enter the Service code for a Staff Member booked as part of Facility Booking

Description

The Service Code description will update when the Service Code is selected

Charge/Hour

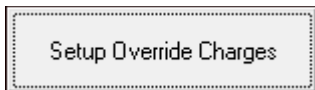
The Cost per Hour for a Staff member as part of a Facility Booking

## Override Charges

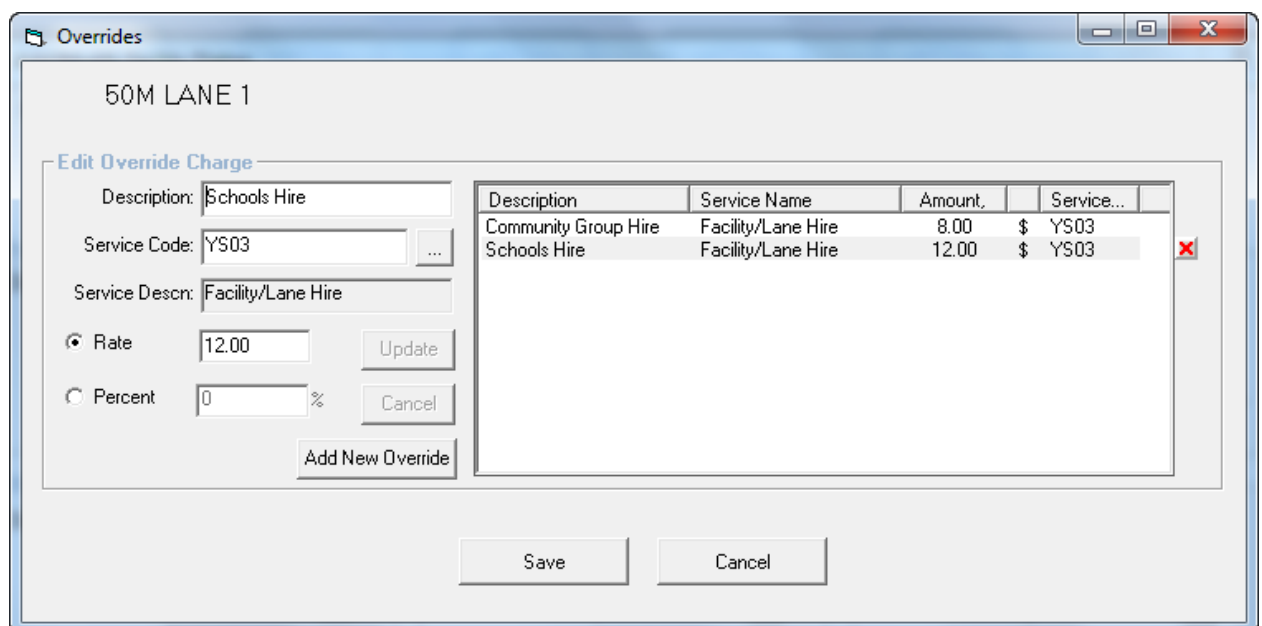
Charge overrides refer to alternative prices you wish to charge.

Setup charge overrides that can be applied to this facilities bookings

Enables Charge overrides to be set up and selected when processing a booking



Opens the Override Charges Setup screen



50M LANE 1

**Edit Override Charge**

Description: Schools Hire

Service Code: YS03



Service Descn: Facility/Lane Hire

Rate: 12.00

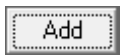
Percent: 0 %

Description	Service Name	Amount	Service...
Community Group Hire	Facility/Lane Hire	8.00	\$ YS03
Schools Hire	Facility/Lane Hire	12.00	\$ YS03

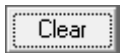
Listed are the Override prices already entered for this Facility.

To edit a Charge Override, click on the line to highlight and adjust details, then click .  
To delete the override, highlight the line and click the .

Description	Type a description for the Charge Override
Service Code	Select a Service Code for payments made by Charge Override
Service Description	This field will update when a Service Code is selected
Rate	Enter the amount to be charged as an override
Percentage	Enter the percentage difference to be charged.  Note: a negative percentage must be entered to give a discount, i.e. 20% entered will charge 20% more than regular price; -20% will apply a 20% discount



"Add" the override to the list of overrides for this facility



"Clear" the details entered



Clear the details and enter an new override

Is this facility a configuration of its parent?	Tick this check box in the event that a centre has one space which is hired out for multiple purposes – e.g. 50m pool and Waterpolo; Basketball and Netball courts.
Send confirmation letters with this facility's bookings	Allows the option to send confirmation letters in the Facility bookings screen

### 3. Define Facility Setup options.

Note: To adjust the Facility Setup options, the appropriate Facility must be highlighted in the left preview pane



**Facility Setup**

- Dates** Set the dates that this facility is unavailable for bookings.
- Times** Set the weekday times this facility is unavailable for bookings.
- Public Holiday Times** Set the facility times for public holidays (override above times).
- Configuration Times** Set the weekday times that this facility configuration operates.
- Other Relationships** Set other facility relationships
- Assets** Set the assets that can be booked with this facility.
- Web Bookings** Setup the facility for booking over the web

Admin > Facilities > Setup Facilities > Dates

**Dates**

Enter the dates that the particular facility is not available for booking

**Facility Unavailability Dates**

Facility: 50M LANE 1

March 2012

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26 Closed	27 Closed	28 Closed	29 Closed	30 Closed	31 Closed

Comments: Closed for Maintenance

Available  
 Unavailable

Update Close

Admin > Facilities > Setup Facilities > Times



Specify the Peak, Off Peak and Unavailable times for this Facility

**Facility Availability**

\*\*\* NOTE: You MUST enter the Unavailable Description before selecting any Unavailable Times.

	12	2	4	6	8	10	12	2	4	6	8	10	12
All													
Monday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak
Tuesday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak
Wednesday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak
Thursday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak
Friday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak	Off Peak
Saturday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Sunday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable

Interval: 30 minutes

Monday to Friday from 9:00 AM to 3:00 PM

- Peak
- Off Peak
- Unavailable

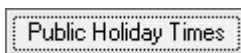
Hover mouse over times for description

Unavailable Description:

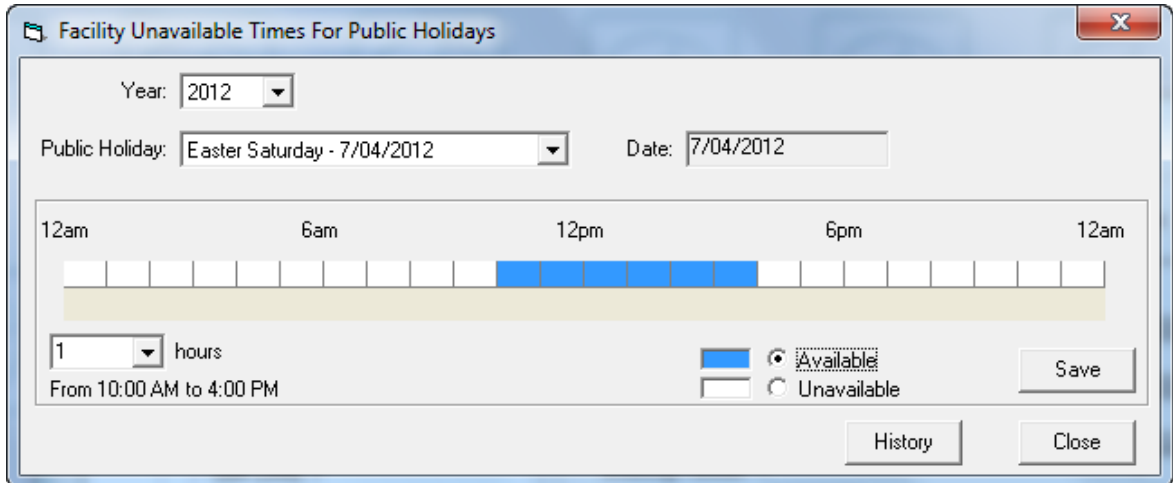
Apply Save Cancel

1. Select the interval - 2 hours; 1 hour; 30 minutes; 15 minutes
2. Enter an Unavailable Description (not necessary when defining Peak and Off Peak periods)
3. Click and drag over the times to allocate. Note: the period selected will be shown in the bottom left
4. Select Peak, Off Peak or Unavailable

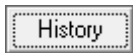
Admin > Facilities > Setup Facilities > Public Holiday Times



Now specify whether the facility is available for hire on the particular public holidays. To setup Public Holidays see – Admin > Admin > Setup Public Holidays

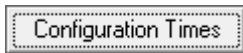


Select the Year and Public Holiday to affect. High areas in Blue (Available) and White (Unavailable) to define the Facility's availability on that day.



Displays a historical record of dates that have been varied and the facility affected

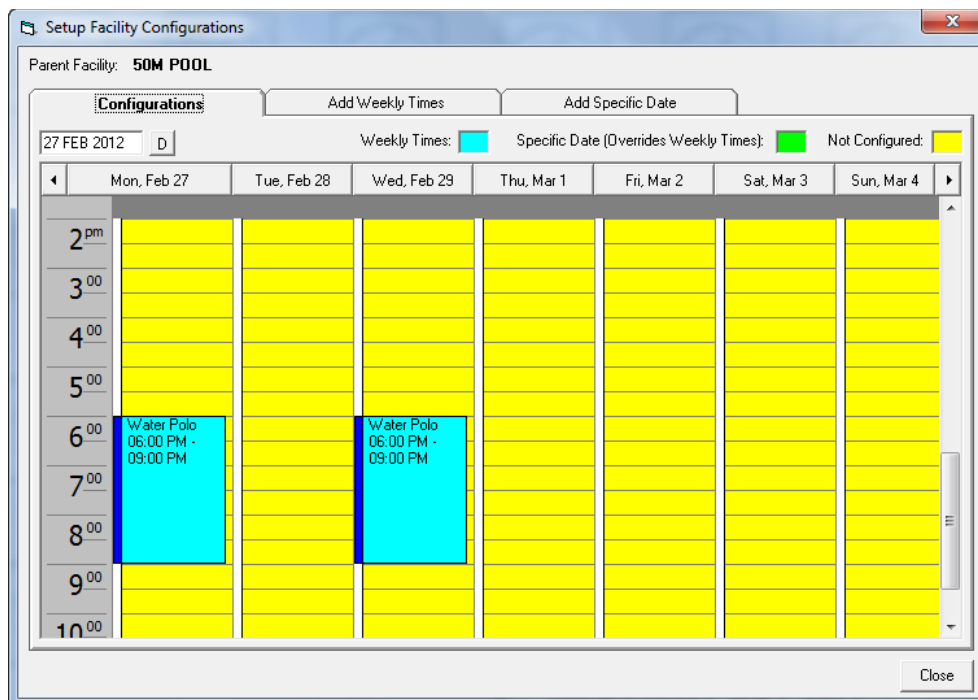
Admin > Facilities > Setup Facilities > Configuration Times



Specify the times of the week that this facility configuration operates

## Configurations

The Configurations Tab displays the times the Parent Facility takes on an alternate configuration





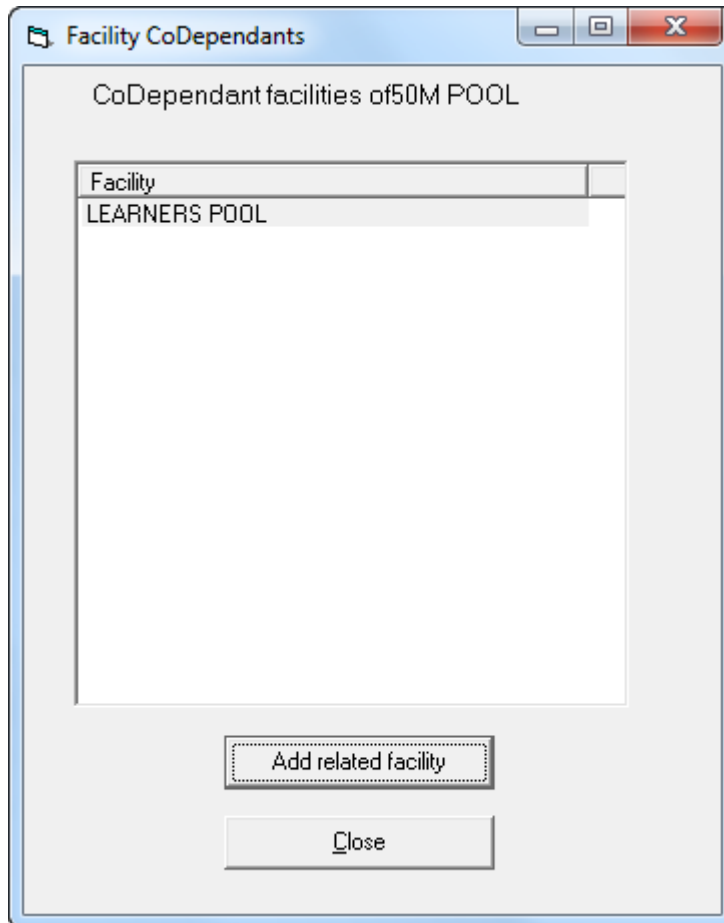


Admin > Facilities > Setup Facilities > Other Relationships

Select a Facility that will be booked out if the related Facility is also booked, e.g. the change rooms can be linked to the Pool so that whenever a Pool booking is made, the change rooms are also booked out



Set other facility relationships

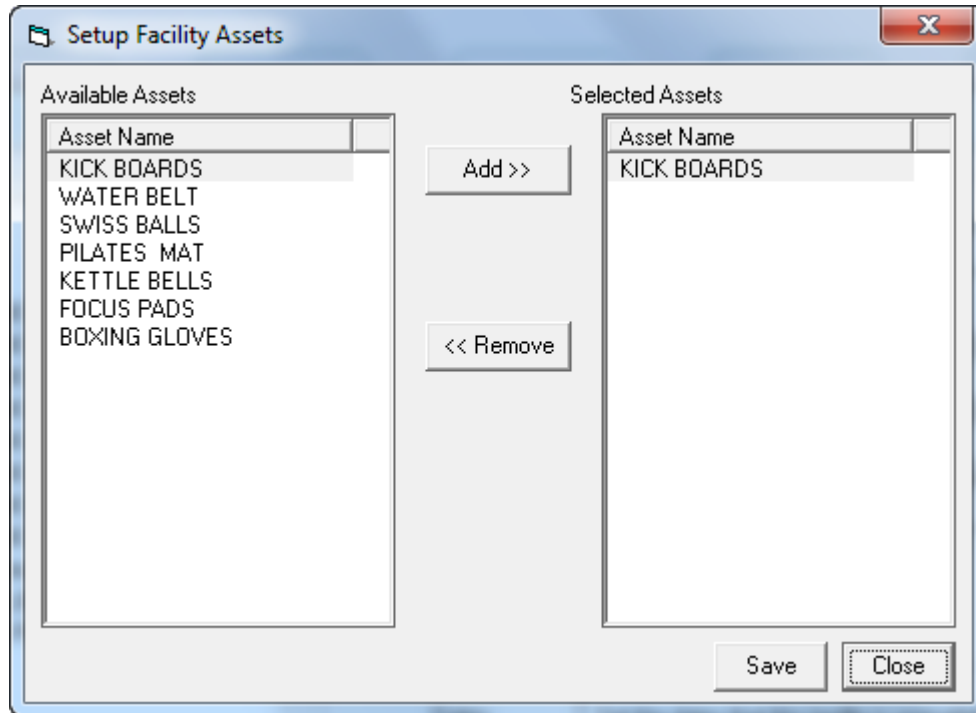


Admin > Facilities > Setup Facilities > Assets



Set the assets that can be booked with this facility

Note: The assets must already have been setup – see Admin > Facilities > Setup Assets



Click an Available Asset on the left pane and “Add” to make available to be booked with this Facility



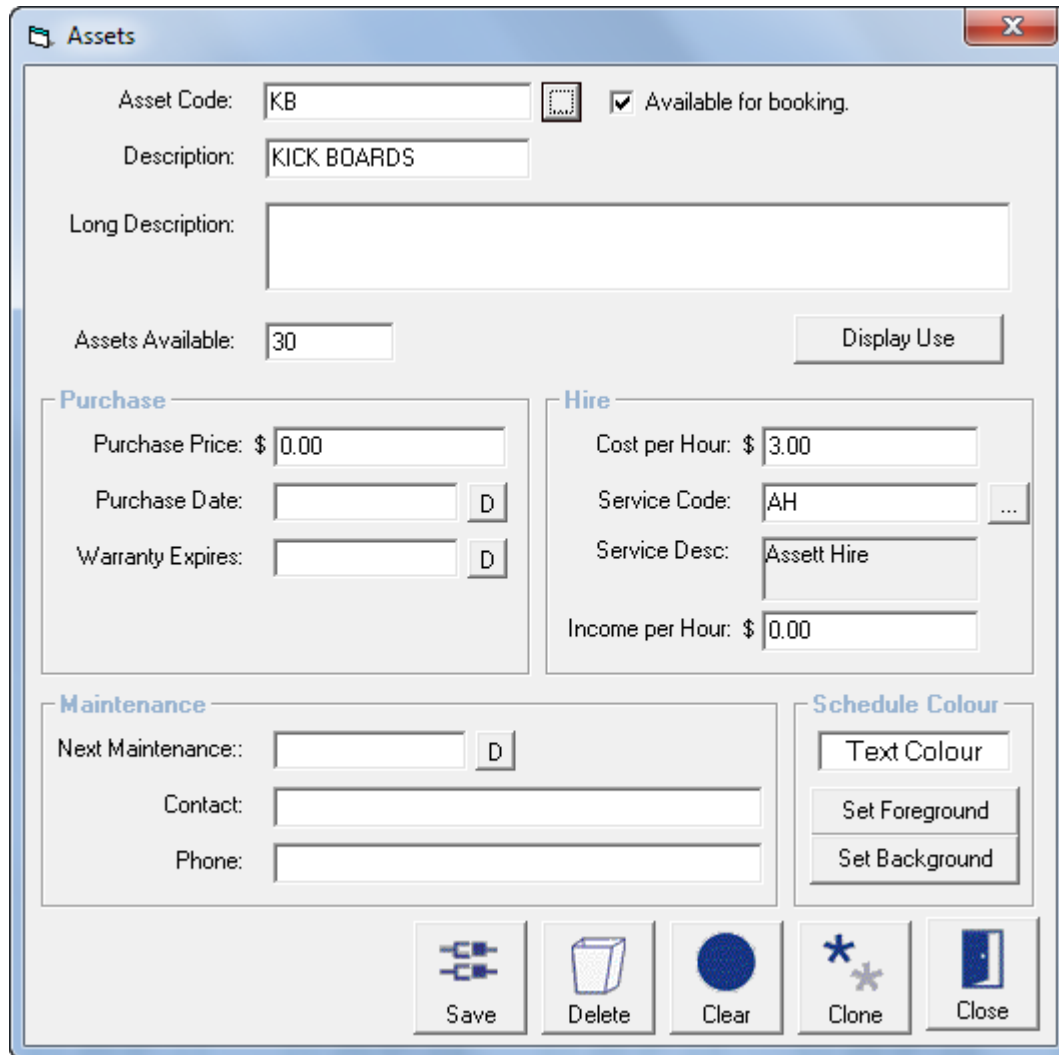
Click a Selected Asset on the right pane and “Remove” from the assets available to be booked with this Facility

## Setup Assets

Admin > Facilities > Setup Assets

This screen will specify an asset available for hire with a facility. An asset can be used with in more than one facility.

Note: A service code must already be set up prior to completing this screen – see Admin > Products/Services > Services (> Services Master if Multi Location site)



Asset Code                      Enter a Asset Code

Description                      Enter the Description

Long Description                A more involved description of the asset

Assets Available                How many of the particular asset available for hire



Available for booking

Tick check box to make Asset Available for booking



details the history of the use of the asset eg when, what time and by whom the asset has been hired

Purchase

Purchase Price

How much the asset cost to purchase

Purchase Date

When the asset was purchased

Warranty Expires

Date the warranty for asset expires

Hire

Cost per hour

How much the asset costs to the centre to be available

Service Code

This code must already be set up – see Admin > Products/Services > Services (> Services Master if a Multi Location site). It provides for the correct assignment of income for reporting purposes

Income per Hour

The amount of income per hour the asset will generate when hired

Maintenance

Next Maintenance

Enter a date when the for scheduled maintenance of the asset

Contact

The contact responsible for maintenance of this asset

Phone

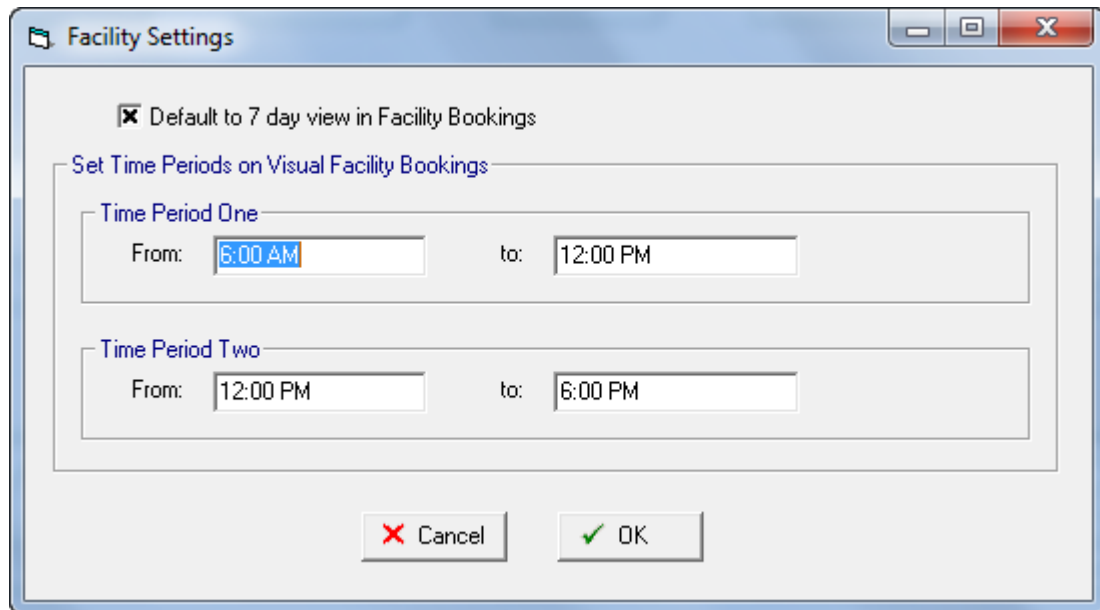
The phone number of maintenance contact

Schedule Colour

The colour the foreground and background will display for the particular asset.

## Facility Settings

Admin > Facilities > Facility Settings



Default to 7 day view  
in Facility Bookings

When a lowest level Facility is selected, the Visual Facility Bookings view will default to show the next seven days

Set Time Periods on Visual Facility Bookings

The time period entered will be accessible by a short cut button on the Visual Facility Bookings screen.

## Web Settings

Admin > Facilities > Web Settings

For further information on Facilities Web settings, please see the Facilityweb manual.

Location: 
...

Description:

Publish this location

**Settings**

Page Description

Adverts

Popup Help

Memberships

Email

Till:

Allow customers to make bookings
 

Allow members to make bookings \* if no, they are treated as casuals

Customers Login Text:

Allow casuals to make bookings
 

Casual Login Text:


Casual Link Text:


Minutes to hold tentative booking :


Master Heading for all pages:


Create customer for every casual booking
 


Note: Web will try to match a casual booking on the email address, but if it cant be found, this flag will cause Links to create a new customer record.

  
Save

  
Delete

  
Clear

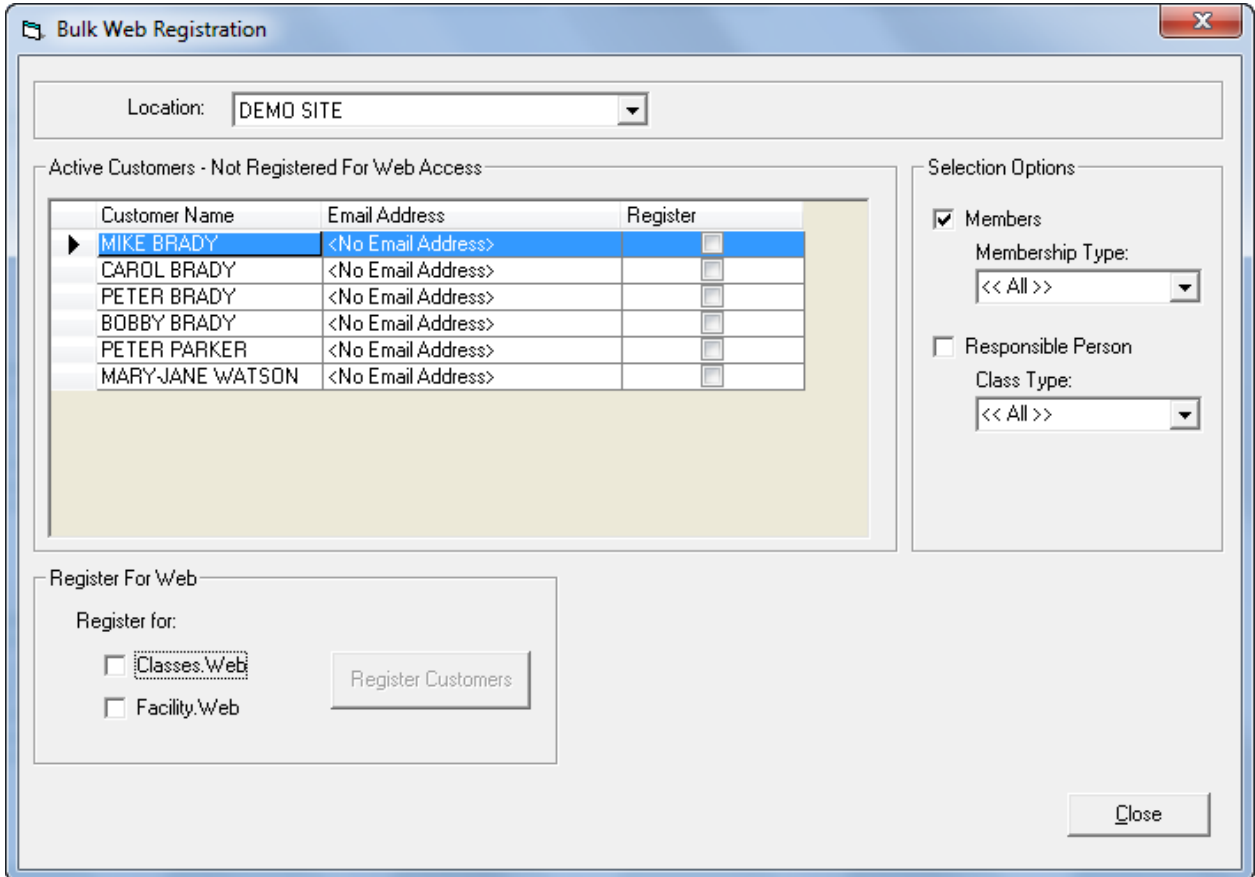
  
Clone

  
Close

## Bulk Web Registration

Admin > Facilities > Bulk Web Registration

The Bulk Registrations screen allows all Members and Responsible Persons who are not registered for Web Access to be registered in bulk.



Location: DEMO SITE

Active Customers - Not Registered For Web Access

Customer Name	Email Address	Register
MIKE BRADY	<No Email Address>	<input checked="" type="checkbox"/>
CAROL BRADY	<No Email Address>	<input type="checkbox"/>
PETER BRADY	<No Email Address>	<input type="checkbox"/>
BOBBY BRADY	<No Email Address>	<input type="checkbox"/>
PETER PARKER	<No Email Address>	<input type="checkbox"/>
MARY-JANE WATSON	<No Email Address>	<input type="checkbox"/>

Selection Options

Members  
 Membership Type: << All >>

Responsible Person  
 Class Type: << All >>

Register For Web

Register for:

Classes.Web

Facility.Web

Register Customers

Close

Location Select the site location to affect

Selection Options

Members Tick this check box to select members to register for Web Access

Membership Type Use the  to select the Membership Types to select members

Responsible Person Tick this check box to select Responsible Persons to register for Web Access

Class Type Use the  to select the Class Types to select Responsible Persons



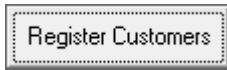
## Active Customers – Not Registered for Web Access

Listed are the active customers within the defined selection options who are not registered for Web Access. Tick the Register check box to select the customer to Register for Web

Register For Web

Register for Classweb      Select the web application to register customers for

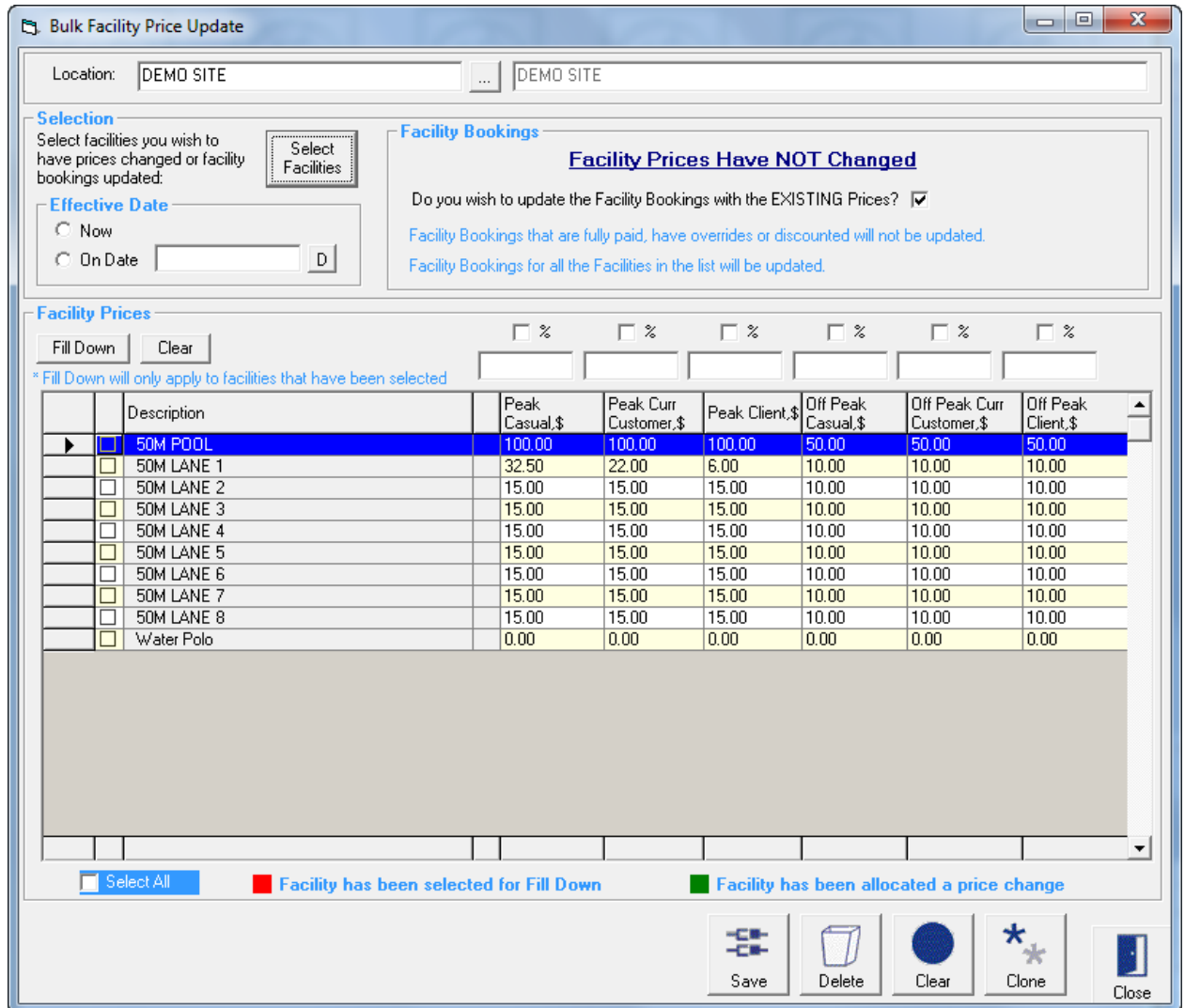
Register for  
Facilityweb                  Select the web application to register customers for



Click the Register Customers button to register the selected customers for the selected web application

## Bulk Facility Price Update

Admin > Facilities > Bulk Facility Price Update



Location: DEMO SITE

**Selection**  
Select facilities you wish to have prices changed or facility bookings updated:

**Effective Date**  
 Now  
 On Date [ ] [D]

**Facility Bookings**  
**Facility Prices Have NOT Changed**  
 Do you wish to update the Facility Bookings with the EXISTING Prices?   
 Facility Bookings that are fully paid, have overrides or discounted will not be updated.  
 Facility Bookings for all the Facilities in the list will be updated.

**Facility Prices**

Fill Down Clear

\* Fill Down will only apply to facilities that have been selected

	Description	Peak Casual,\$	Peak Curr Customer,\$	Peak Client,\$	Off Peak Casual,\$	Off Peak Curr Customer,\$	Off Peak Client,\$
<input checked="" type="checkbox"/>	50M POOL	100.00	100.00	100.00	50.00	50.00	50.00
<input type="checkbox"/>	50M LANE 1	32.50	22.00	6.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 2	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 3	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 4	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 5	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 6	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 7	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	50M LANE 8	15.00	15.00	15.00	10.00	10.00	10.00
<input type="checkbox"/>	Water Polo	0.00	0.00	0.00	0.00	0.00	0.00

Select All    ■ Facility has been selected for Fill Down    ■ Facility has been allocated a price change

Save Delete Clear Clone Close

Location

Select the location for which Facilities Prices are to be updated

Selection



Select the facilities you wish to have prices changed or facility bookings updated

Effective Date


Identify when the changes are to take affect – now or on a specified date

## Facility Bookings

Tick this check box to update Facility Bookings with the updated prices. Facility bookings that are fully paid, have overrides or are discounted will not be updated.

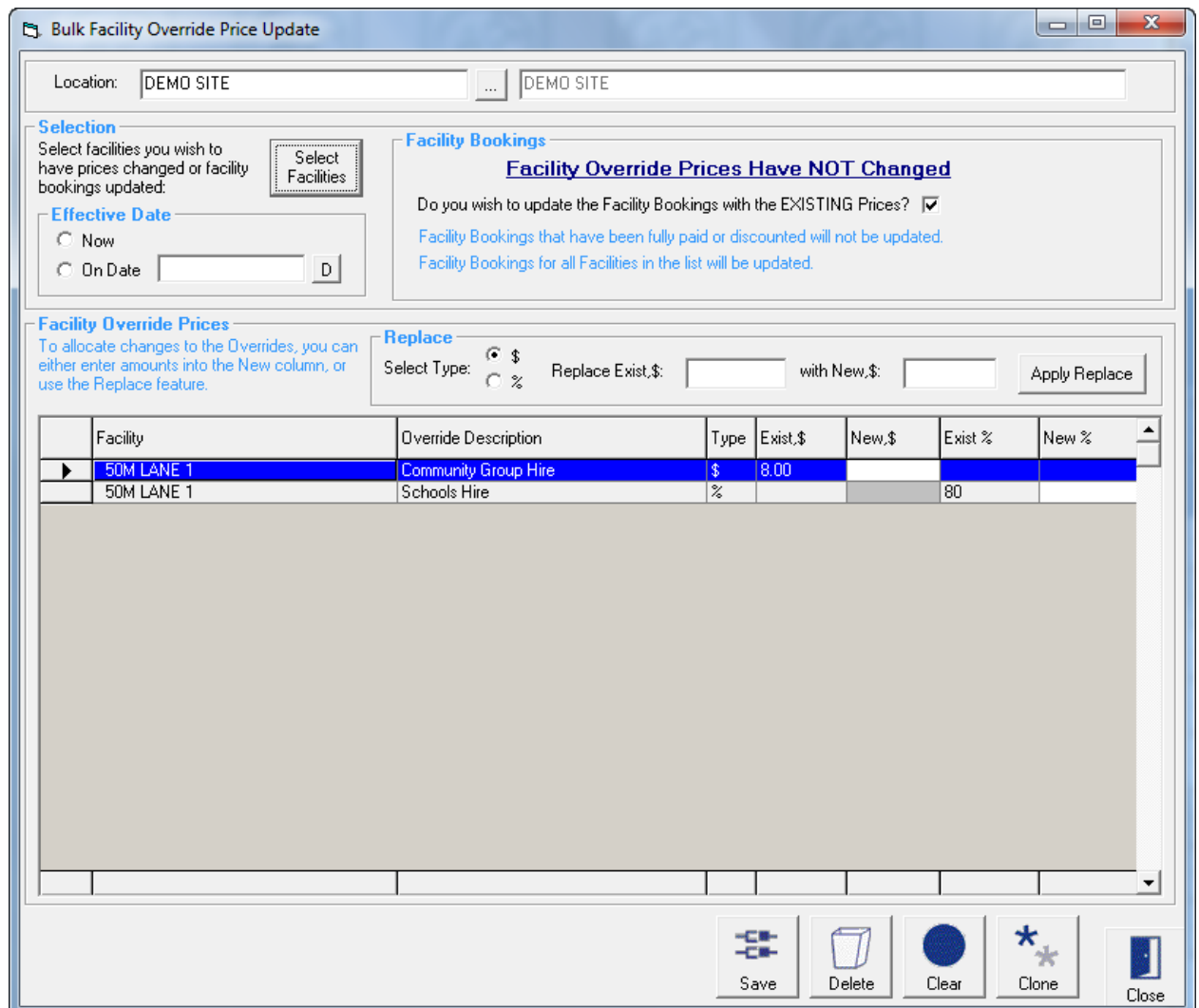
## Facility Prices

Listed are the selected Facilities. To affect a price change against a facility the check box must be ticked.

1. Enter a new price or percentage into the field above the column you wish to change (if entering a percentage, tick the % check box)
2. Click on 

## Bulk Facility Override Price Update

Admin > Facilities > Bulk Facility Override Price Update



Location: DEMO SITE

**Selection**  
Select facilities you wish to have prices changed or facility bookings updated.

**Facility Bookings**  
**Facility Override Prices Have NOT Changed**  
Do you wish to update the Facility Bookings with the EXISTING Prices?   
Facility Bookings that have been fully paid or discounted will not be updated.  
Facility Bookings for all Facilities in the list will be updated.

**Facility Override Prices**  
To allocate changes to the Overrides, you can either enter amounts into the New column, or use the Replace feature.

**Replace**  
Select Type:  \$  %  
Replace Exist.\$:  with New.\$:

Facility	Override Description	Type	Exist.\$	New.\$	Exist %	New %
50M LANE 1	Community Group Hire	\$	8.00			
50M LANE 1	Schools Hire	%			80	

Save Delete Clear Clone Close



Location Select the location for which Facilities Override Prices are to be updated

Selection



Select the facilities you wish to have Override Prices changed or facility bookings updated

Effective Date Identify when the changes are to take affect – now or on a specified date

Facility Bookings

Tick this check box to update Facility Bookings with the updated prices. Facility bookings that are fully paid or are discounted will not be updated.

Facility Override Prices

To allocate changes to the Overrides, either enter amounts into the New column, or use the Replace feature.

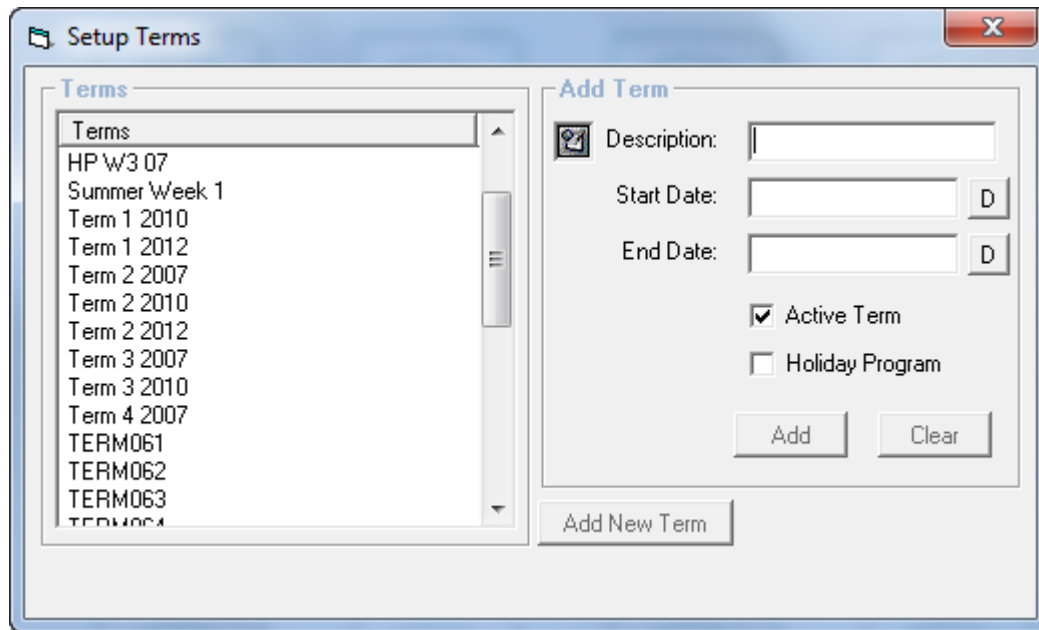


## Admin > Classes

The following menu screens in this section establish and define how classes are going to operate within Links.

### Terms

Admin > Classes > Terms



This window will allow the user to set up Terms and Term dates which will be used for Classes that will operate on a term basis.

Terms This box shows the list of terms that have been created



Press this button to create a new term

Description Type in the term description

Start Date Click on the  to select which date the term starts.

End Date Click on the  to select which date the term will end.

Active Term Select for all active terms

Holiday Program Select if this term is to be used for a holiday program class type

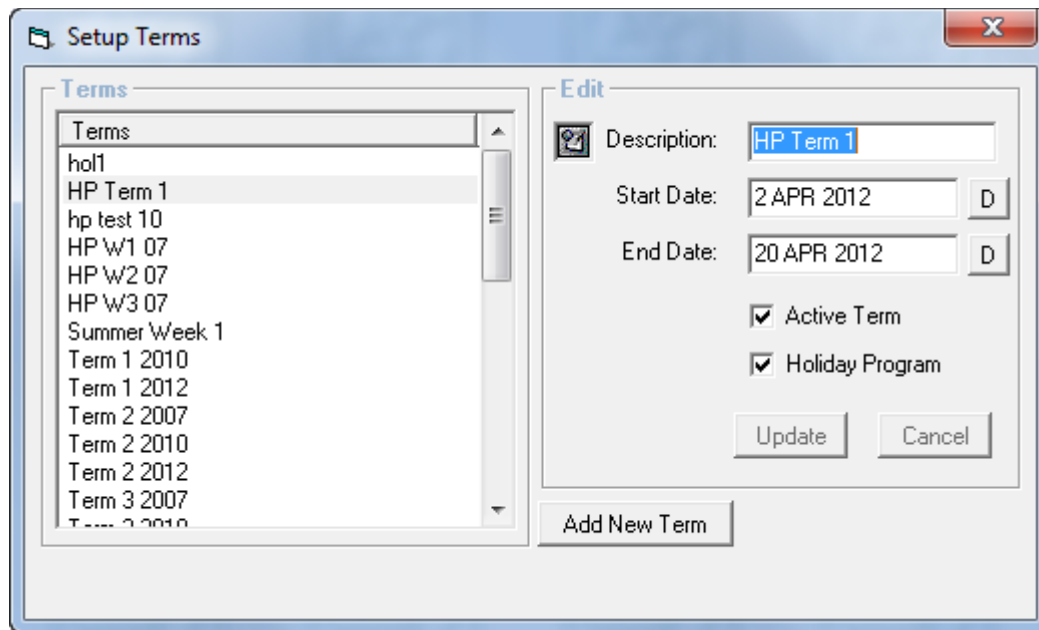



Click on this icon if you wish to save this term to the list of available terms



Click on this icon if you want to clear the information that has been created for this new term

### Editing a Term

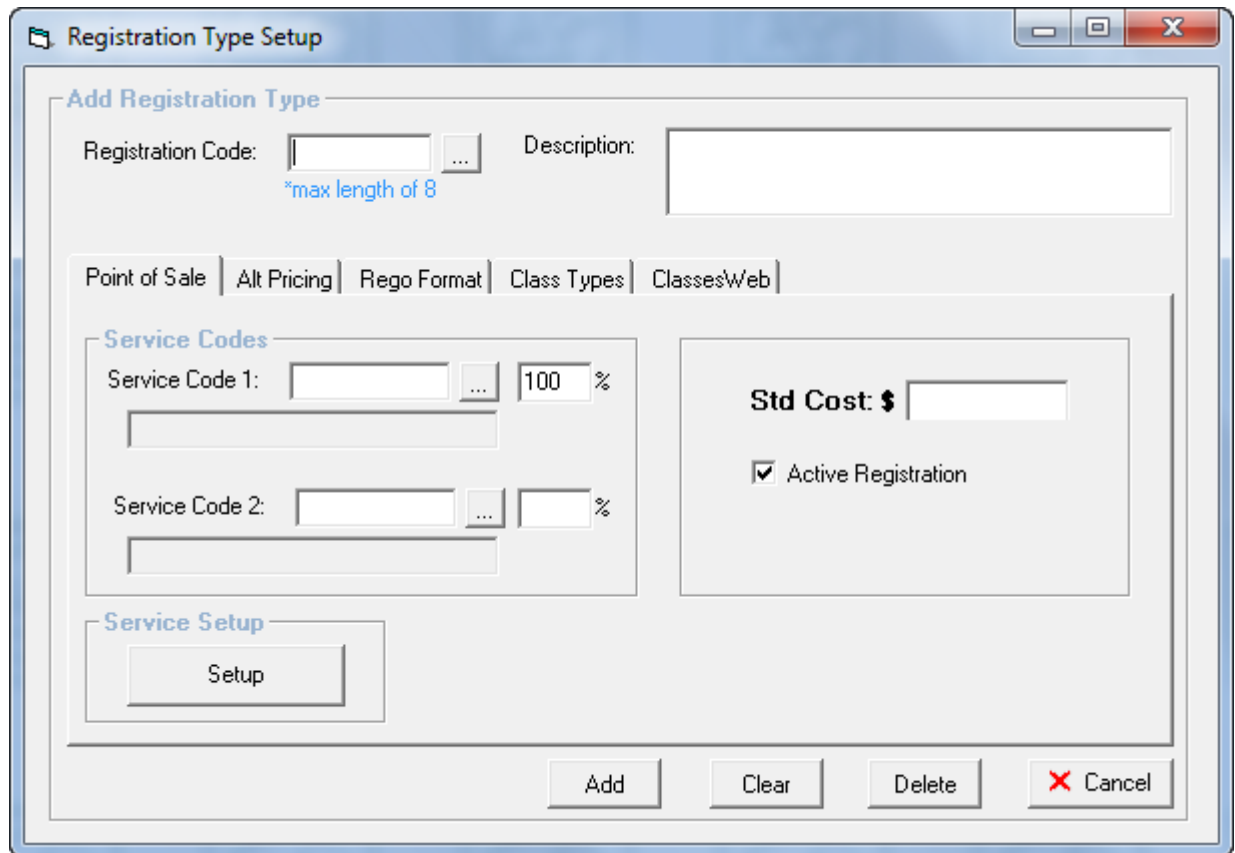


You can also edit a term once it has been created. Click on the term to be edited, you will notice that the window on the right has changed into edit mode. From here you can choose to change the description, start and end dates then select .

**Note: Changes made to existing entries will affect the operation of CLASSES immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

## Registration Types

Admin > Classes > Registration Types



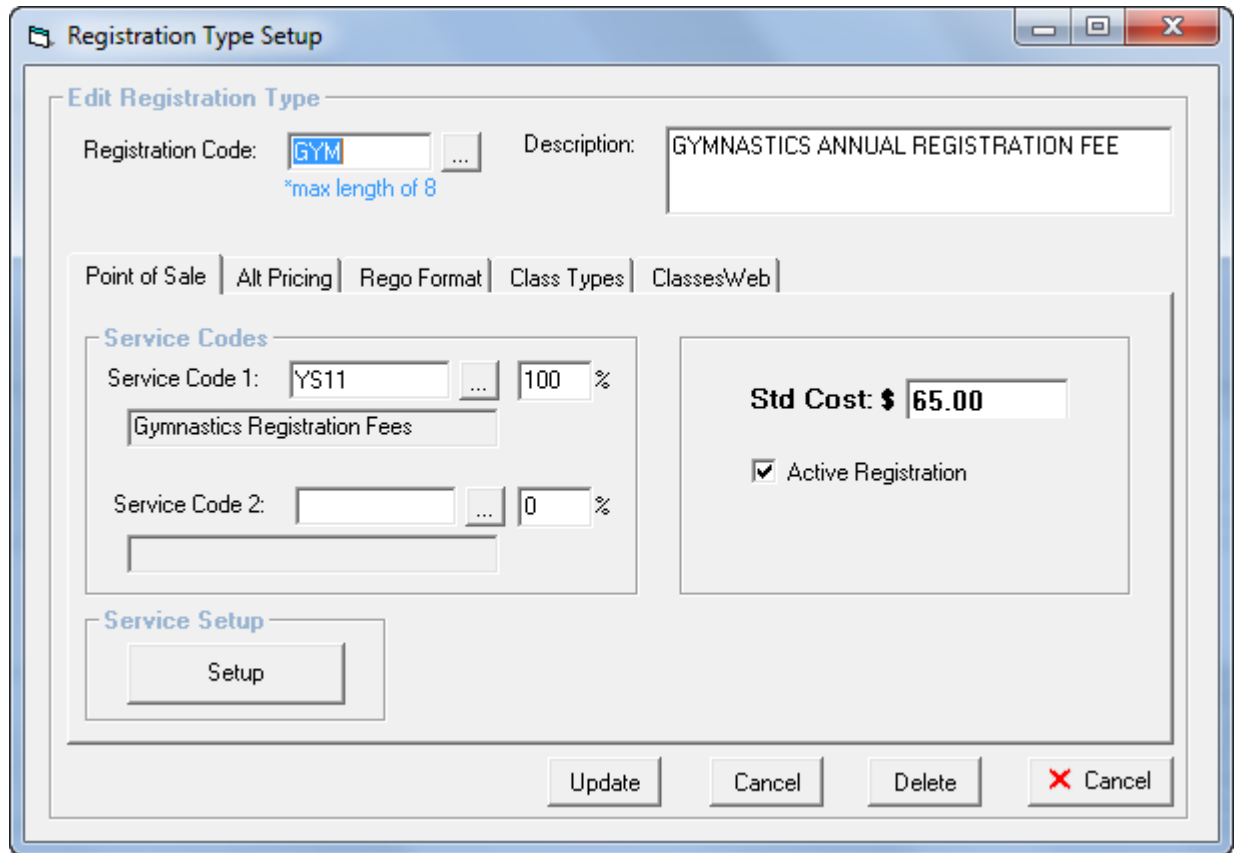
The Registration Type Setup allows a registration fee to be owing for Classes bookings either on an Anniversary date or annually on a Set Date, payable by student or family.

**Registration Code**      Type in a code without spaces or symbols eg: GYM. When creating new codes a mix of numbers and letters is preferable



Click this icon if you want to search for an existing Registration Type

**Description**              Type in a description for the Registration, eg: Gymnastics Annual Registration fee. If choosing an existing Registration the description will automatically be displayed



Std Cost

Enter the default pricing for this Registration

Active  
Registration

Tick box to make this Registration Type active

Service Codes

Service Code 1

Select the service code to which the money will be allocated for the Registration fee.

Service Code 2

The Registration fee can be split between 2 service codes. If required, enter the second service code and enter the appropriate percentage split

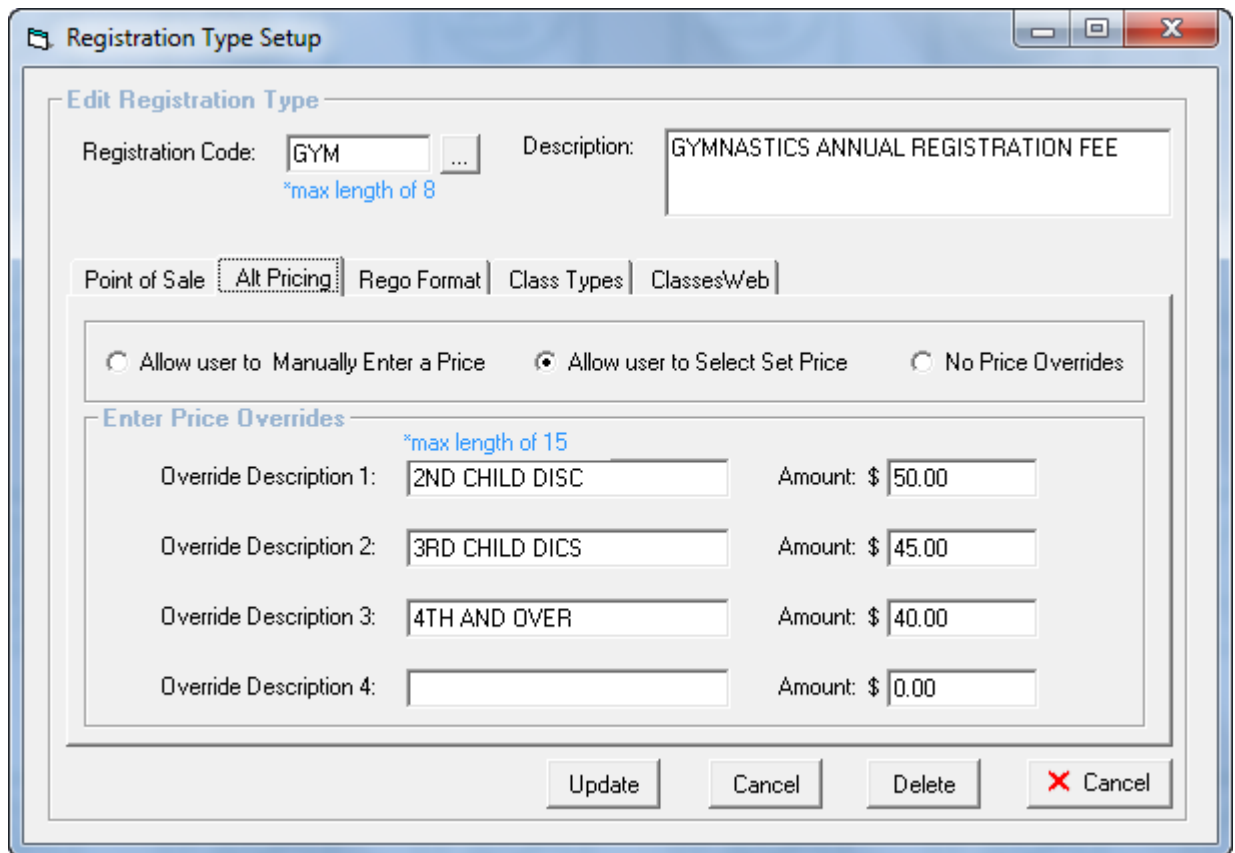
## Service Setup



Click the Setup button to open the Service Setup screen – see Admin > Products/Services > Services > Services Master

Admin > Classes > Registration Types > Alt Pricing

Here you can select to allow users to either enter a manual override price or only allow them to select a pre designated override option



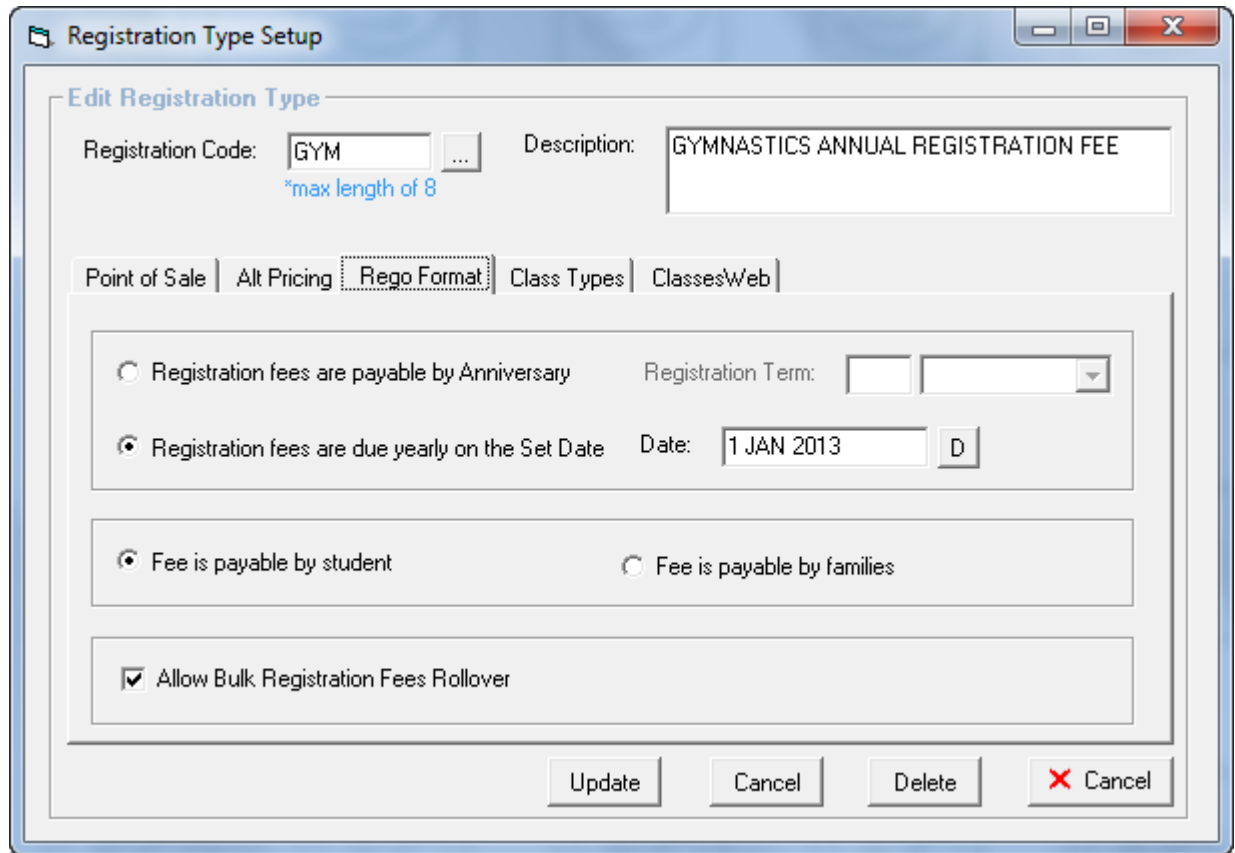
The screenshot shows the 'Registration Type Setup' window with the 'Alt Pricing' tab selected. The 'Registration Code' is 'GYM' and the 'Description' is 'GYMNASTICS ANNUAL REGISTRATION FEE'. The 'Point of Sale' is set to 'Alt Pricing'. The 'Allow user to Select Set Price' radio button is selected. The 'Enter Price Overrides' section contains four rows with descriptions and amounts:

Override Description	Amount
2ND CHILD DISC	\$ 50.00
3RD CHILD DICS	\$ 45.00
4TH AND OVER	\$ 40.00
	\$ 0.00

Allow user to Manually Enter a Price      Allows a manual price override at time of booking

Allow user to Select Set Price      The price override options specified are available at time of booking

No Price Overrides      Standard price cannot be altered



Registration fees are payable by Anniversary

Each customer may have a different renewal date. For this option a customer's registration fee will be due the number of days, weeks etc from when they purchase the first fee. For example if the term is set to 1 year and the customer purchases a rego on December 12<sup>th</sup>, it will be due again December 12<sup>th</sup> the following year

Registration fees are due yearly on the Set Date

For this option, users will purchase a registration throughout the year and no matter when they purchase the registration it will expire on the designated date. This option is preferable for those that must accept association fees each year for students

Fee is payable by student

Registration is assigned to the student

Fee is payable by families

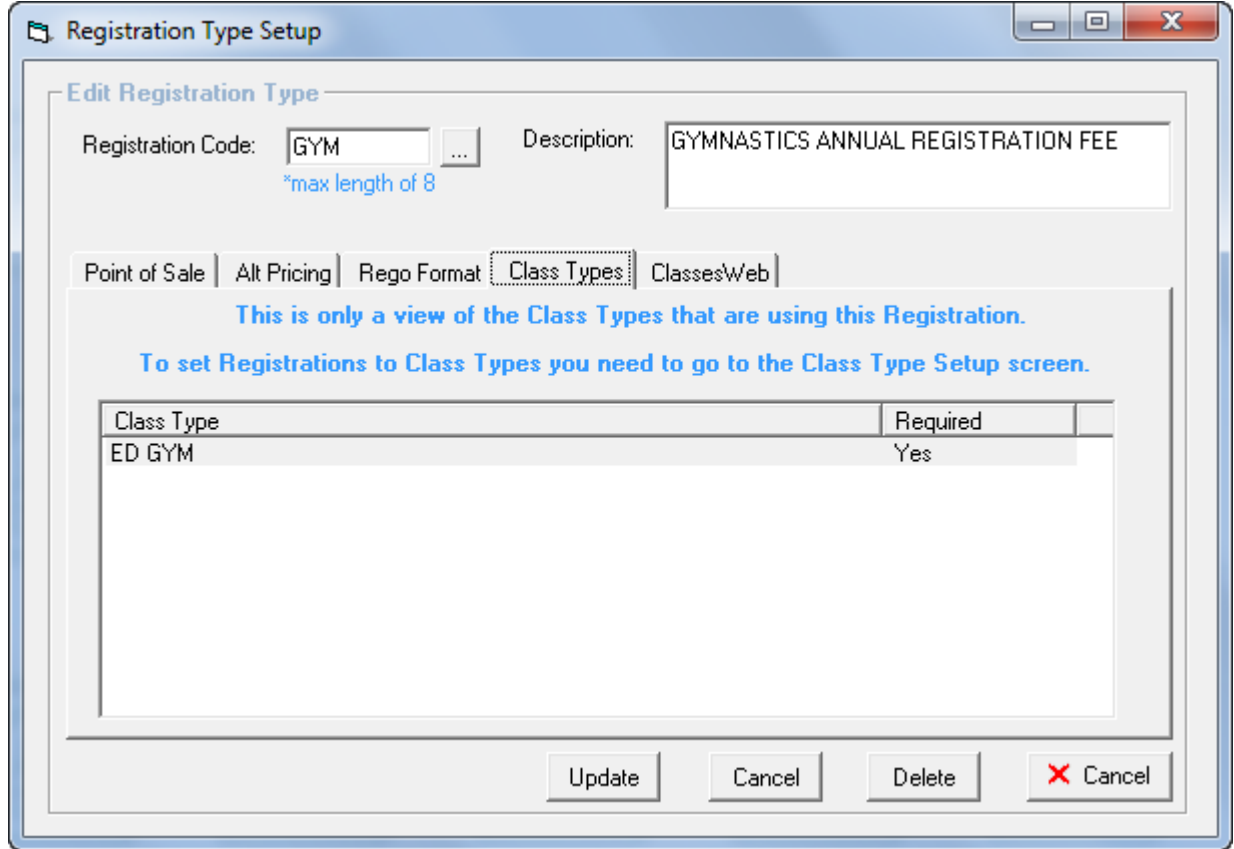
Registration assigned to the family and will be displayed on the registration tab in the student screen for all students in the family

Allow Bulk Registration Fees Rollover

See Admin > Classes > Bulk Registration Fees Allocation

Admin > Classes > Registration Types > Class Types

This screen displays the Class Types which are using this Registration. To set Registrations to Class Types, see Admin > Classes > Class Types > Registrations



**Registration Type Setup**

**Edit Registration Type**

Registration Code:  ...  
\*max length of 8

Description:

Point of Sale | Alt Pricing | Rego Format | **Class Types** | ClassesWeb

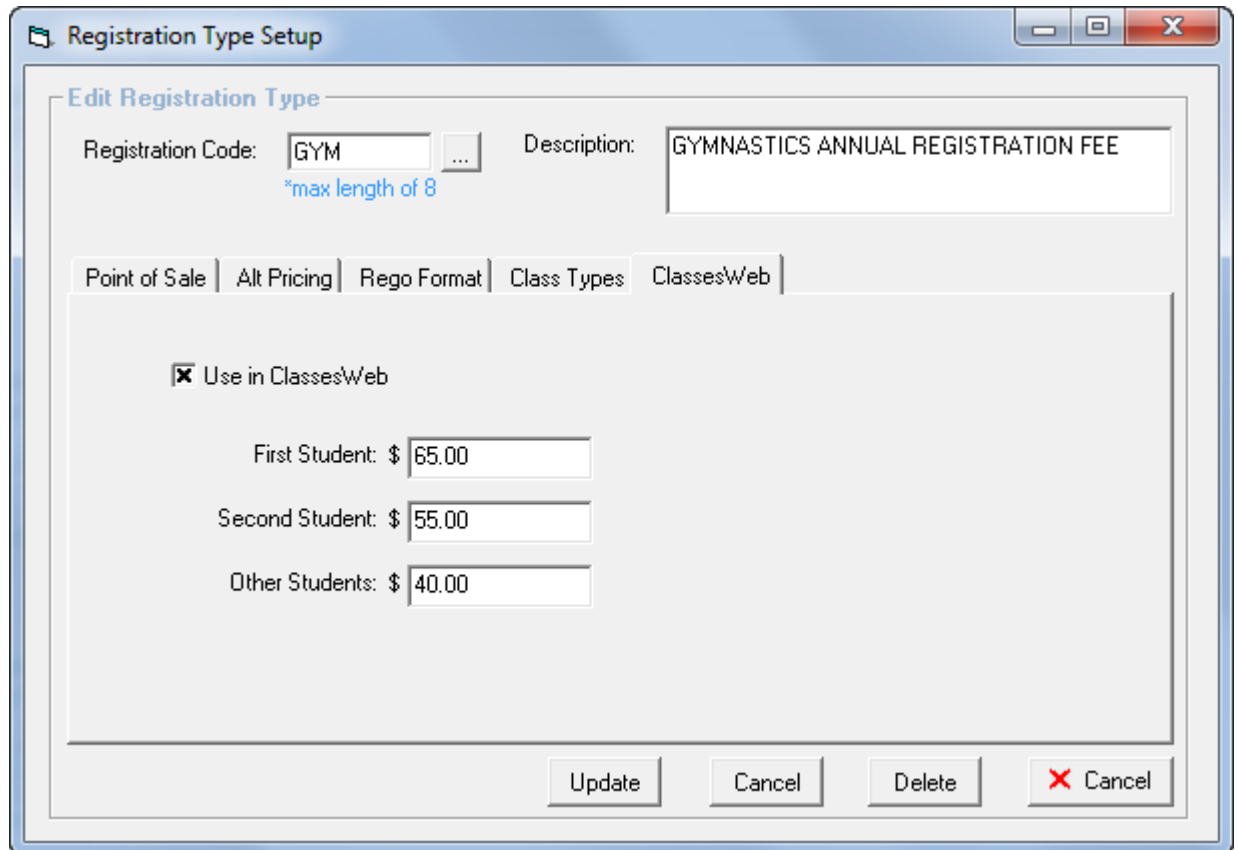
**This is only a view of the Class Types that are using this Registration.**  
**To set Registrations to Class Types you need to go to the Class Type Setup screen.**

Class Type	Required
ED GYM	Yes

Update | Cancel | Delete | **X Cancel**

Admin > Classes > Registration Types > Classweb

Mandatory registration fees are automatically added to a customer account when making a web booking. You can choose to override the price that is allocated to students for web bookings.



Use in Classesweb

Tick checkbox to use the defined Registration fees for Classesweb bookings

First Student etc

Define the Registration fee to be allocated to Student Bookings made in Classweb



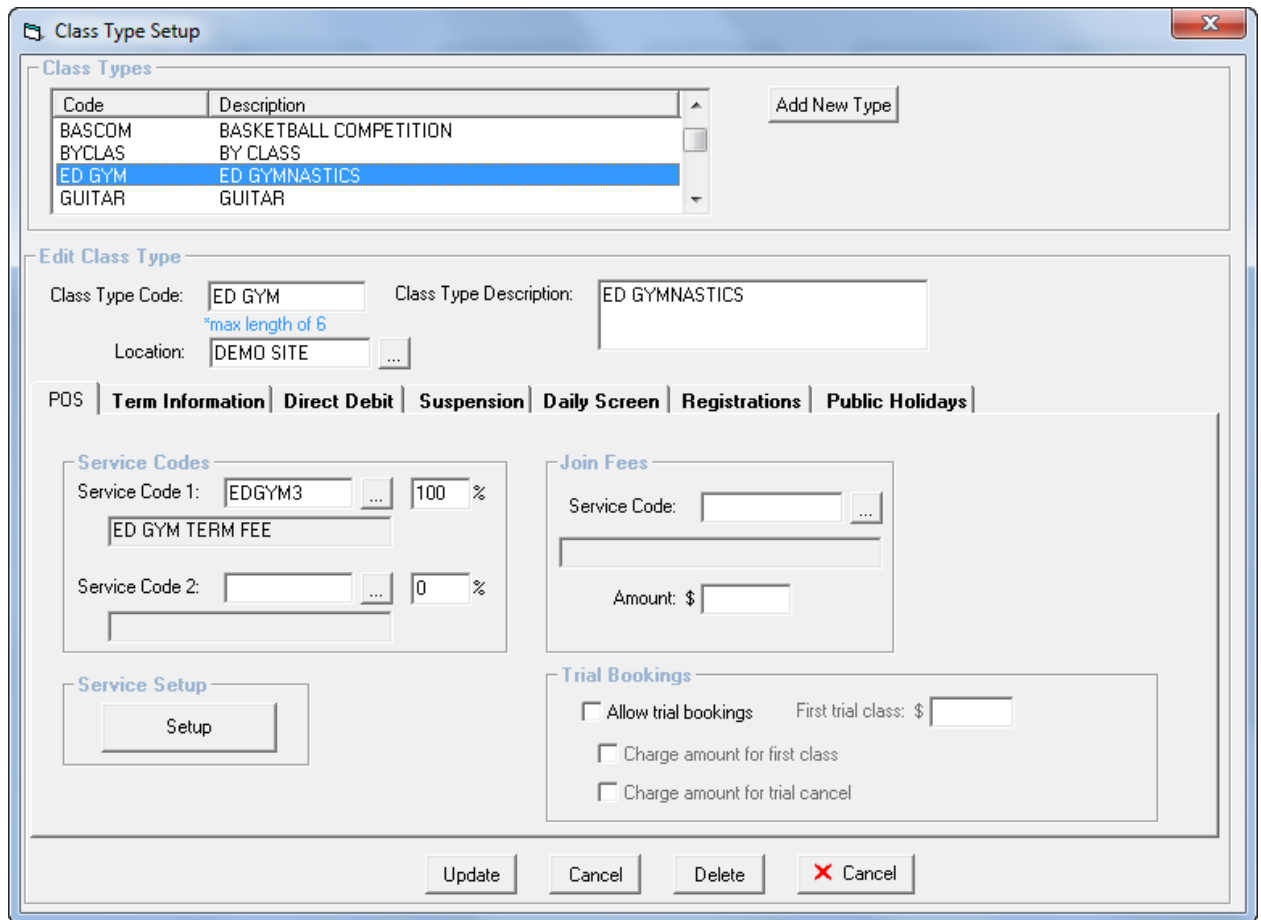
## Class Types

Admin > Classes > Class Types

This window is used to set up class types for Classes. Setting up a class type is the most important step within this module as it defines the parameters for any class attached to the class type i.e. whether the class is to be run on a term or perpetual basis, the direct debit conditions, where payments are to be allocated against and if suspensions are allowed.

Fee charges for class types are set up within the class set up window.

Before proceeding with setting up a class type you will first need to set up term dates if you choose some class types to run a term-by-term frequency. See Admin > Classes > Terms



Code	Description
BASCOM	BASKETBALL COMPETITION
BYCLAS	BY CLASS
ED GYM	ED GYMNASTICS
GUITAR	GUITAR

Class Type Code:  Class Type Description:

Location:

POS | **Term Information** | Direct Debit | Suspension | Daily Screen | Registrations | Public Holidays

**Service Codes**

Service Code 1:   %

Service Code 2:   %

**Join Fees**

Service Code:

Amount: \$

**Service Setup**

**Trial Bookings**

Allow trial bookings First trial class: \$

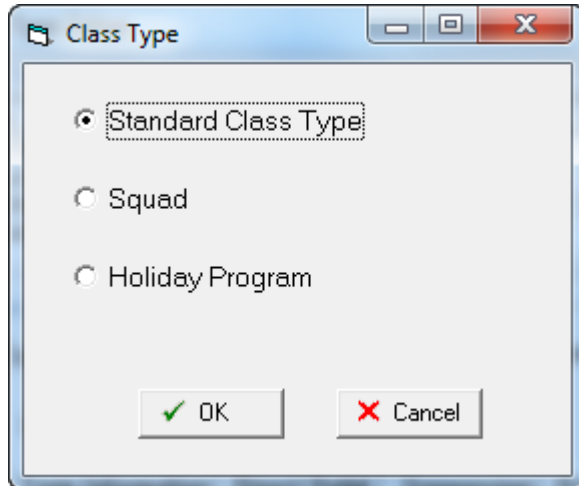
Charge amount for first class

Charge amount for trial cancel

### New Class Type



Click on this icon if you want to add a new class type and following screen will display the three basic class type settings



Standard Class Type

The classes linked to this Class Type run once a week where a person booked is expected to attend once a week at a scheduled day and time. The payment structure can be term based, perpetual and term and perpetual operating together

Squad

Squads mainly differ from standard perpetual bookings in that

- Bookings are made within a group of linked classes where the classes can run several times a week at various times
- The Direct Debit does not charge by class cost, but by the group cost as defined in the Class Type Setup screen
- The booking process allows for a person to be booked into one or more classes within that week simultaneously
- The payment structure can only be perpetual based. Payment is through the direct debit procedure
- There are no Family or Extended Family discounts calculated for squads

Holiday Program

The classes linked to this Class Type differ from standard term bookings in that

- Bookings are made within a group of linked classes where the classes run each day of the week at the same scheduled time and area
- The payment structure can only be term based with no direct debit features
- There are no make ups for holiday programs
- Bookings in Holiday Programs cannot be rolled over

New/Edit Standard Class Type

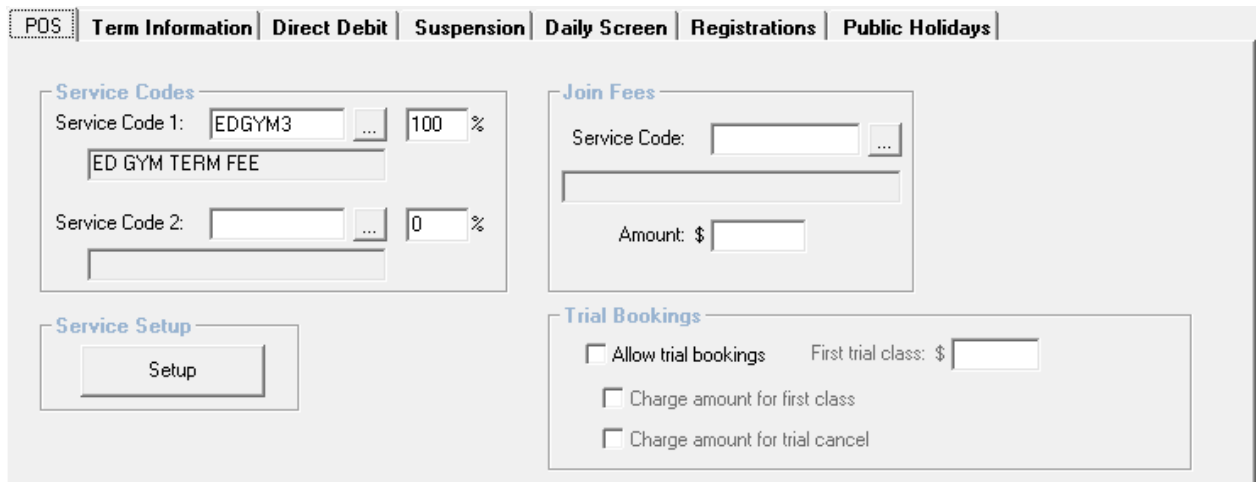
Class Type Code

Type in a code for this class type (maximum of 6 characters)

Class Type Description Type in a description for the class type

Location Select the Location for this class type

Admin > Classes > Class Types > POS




The screenshot shows the 'Term Information' tab in the POS system. It contains four main sections:
 

- Service Codes:** Two rows for defining service codes. The first row has 'EDGYM3' in the code field, 'ED GYM TERM FEE' in the description field, and '100' in the percentage field. The second row has empty fields and '0' in the percentage field.
- Join Fees:** Fields for 'Service Code' and 'Amount \$'.
- Service Setup:** A single 'Setup' button.
- Trial Bookings:** Three checkboxes: 'Allow trial bookings' (with a 'First trial class: \$' field), 'Charge amount for first class', and 'Charge amount for trial cancel'.

### Service Codes

Service codes are used to assign income. Therefore any payments received for classes attached to the class types will be allocated the service or services defined in this setup screen. There is an option to allocate income to two service codes if desired so long as the split between the two adds up to 100%.

Note: Before setting up a class type you must set up a service type. Service code/s MUST be assigned to all class types.

Service Code 1 Click on the  to select which service type you want to allocate to the class type. If choosing another service, you will need to assign a value against the % split. Simply type in the value of the split

Service Code 2 Repeat as above if you want to allocate a second service to the class type

### Service Setup



Click the Setup button to open the Service Setup screen – see Admin > Products/Services > Services (> Services Master if you are a Multi Location site)

## Join Fees

You are also given the option of assigning another payment against Class Types. This would be a one off payment that can be used for administration purposes as an example. Only one joining fee service can be assigned to class types, therefore the financial allocation will default to 100%.

### Service Code

Click on the  to select which service type you want to allocate to the class type. The service description will then appear

### Amount

Enter the value of the Join Fee

## Trial Bookings

### Allow trial bookings

Check this box to allow trials bookings for programs of this Class Type

### Charge amount for first class

Check this box if you want to set a specific amount to be billed for the trial class

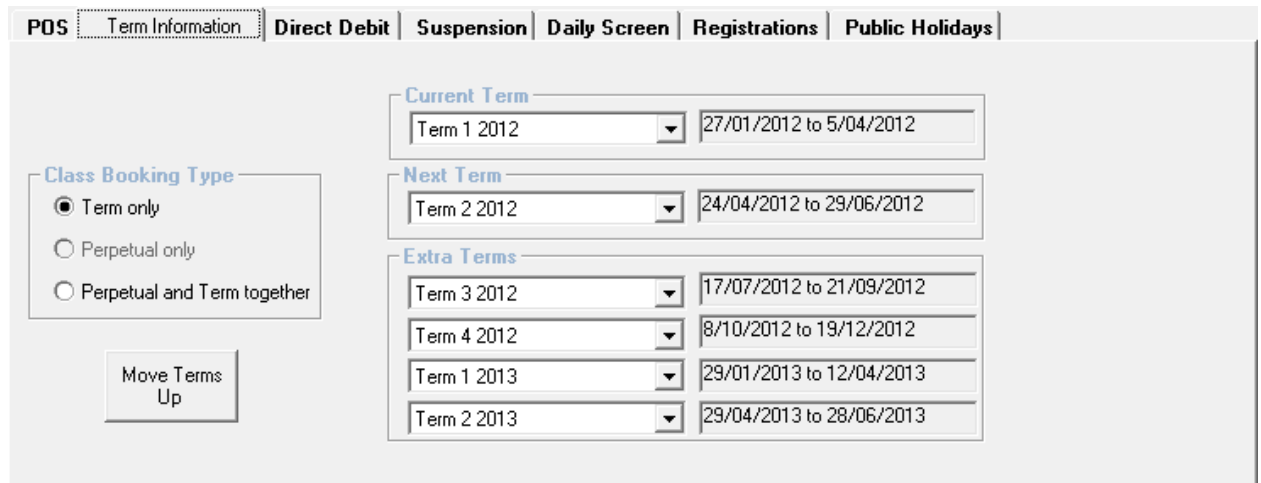
Note: If you don't check the box and set a price the cost of the trial will be included in the normal pro rata calculation. If you wish to charge \$0 for trial classes you must check this box and enter \$0 for the first trial class

### Charge amount for trial cancel

If you wish to charge a fee for cancelling a trial class check this box

### First trial class

Enter a cost for the first trial and/or trial cancellation i.e. \$0, \$5 etc.



This window is used to assign the program frequency to the class type. You have the choice of 3 class-booking types to determine the frequency of the class type.

#### Class Booking Type

**Term Only** Choosing this option, the Class Type will run according to the term dates allocated. The term must have a start and end date.

(Payment for these classes is cash basis only)

**Perpetual Only** Choosing this option, the Class Type will run on a perpetual basis

**Perpetual & Term Together** This class type can be run both on a perpetual and term frequency. (This allows customers to pay for their fees through direct debiting or cash or pay for the term)

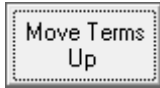
**Current Term** If choosing the 'Term only' or 'Perpetual and Term Together' you will be required as a minimum to assign a current term date to the class type. Click on the  to choose which term

**Next Term** You also have the option of choosing a second term to be the next term following the current term. If choosing the 2<sup>nd</sup> term, this will allow you in take bookings for class enrolments in advance. Click on the  to choose which term

You can also allocate a further 4 terms

## Move Terms Up

Links assigns pricing to the status of the term i.e. "Current Term" or "Next Term" as opposed to pricing an actual term, "Term 3 2012".

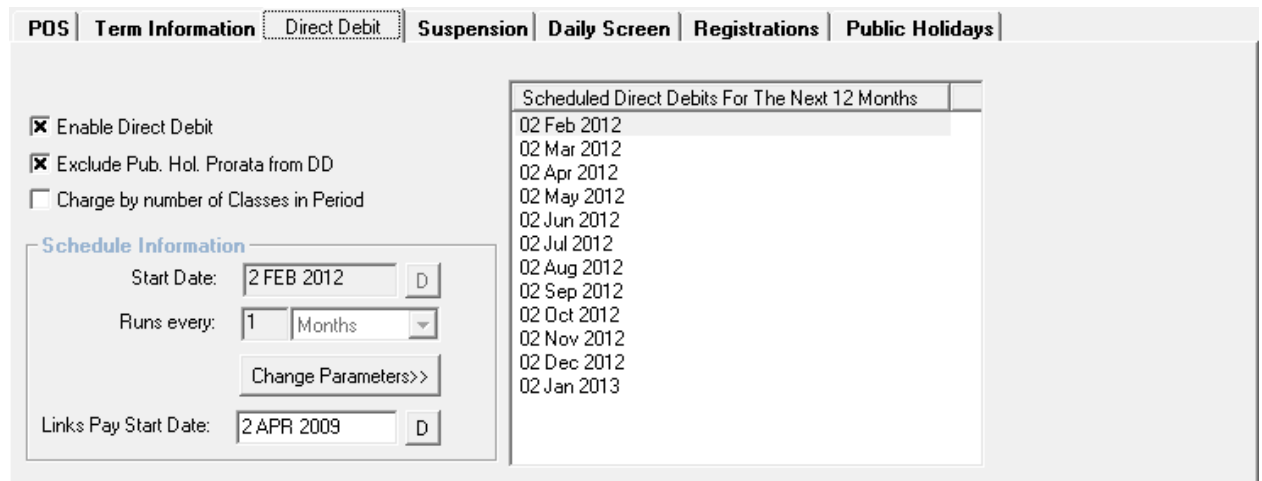


When the term changes, click the "Move Terms Up" button so that the pricing for Current Term and Next Term correlate accurately for the actual term

Note: This process is irreversible

*Admin > Classes > Class Types > Direct Debit*

This window will allow you to allocate the payment frequency against the class type if you have chosen the class booking type to be either perpetual only or perpetual and term together. If you have chosen the class booking type to be term only this window will become inactive.



**Enable Direct Debit**

Check this box to enable the direct debit booking type and you can proceed to fill in the remaining information

**Exclude Pub. Hol. Prorata from DD**


By checking this box any prorata calculations used in the direct debit process for public holidays will be excluded and the full amount applied. In other words it will charge the student their full fee even if they have a lesson that falls on a public holiday

**Charge by number of Classes in Period**

The Debit amount will be calculated by the number of Classes in the Debit Period (e.g. 4 week month compared to 5 week month)

## Schedule Information

### Start Date

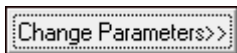
Choose the date you want this class type's direct debits to commence. Click on the  to choose the starting date

### Runs every

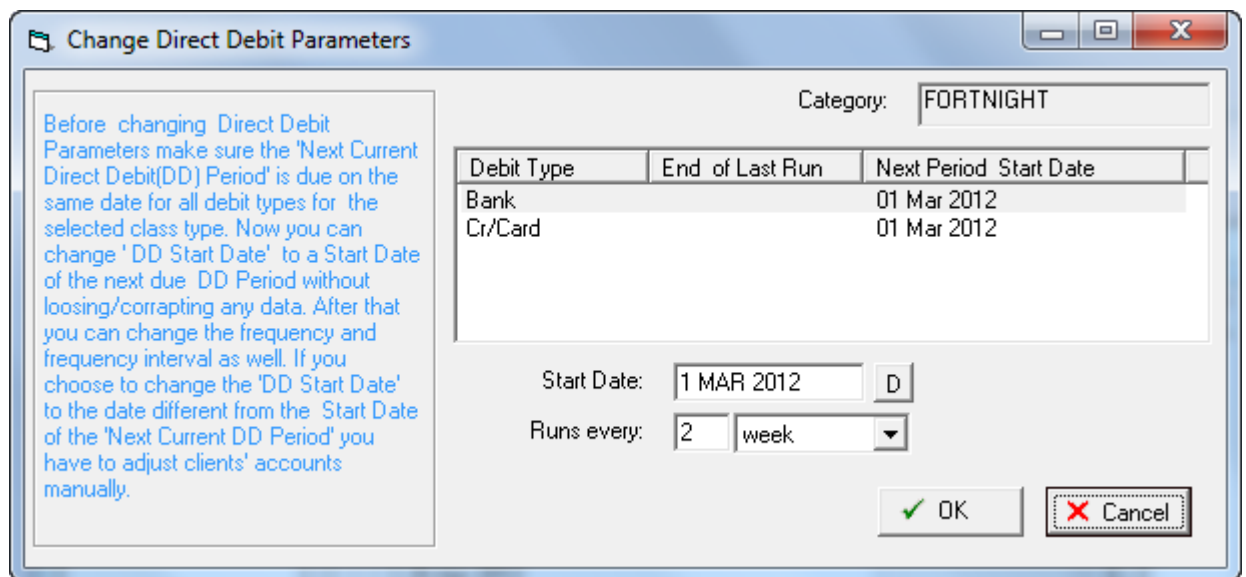
This field requires a numeric value that will represent the frequency nominated. Click on the ▼ to select the frequency. The example above shows that the 'Scheduled Direct Debits for the Next 12 Months' for this class type will be charged on a monthly basis starting from 1 June 2003

### Links Pay Start Date

The date entered here indicates the first DD for this Class Type that will be processed using the LinksPay services



Press this button to change the direct debit schedule. The following screen will be displayed



Change Direct Debit Parameters

Category: FORTNIGHT

Debit Type	End of Last Run	Next Period Start Date
Bank		01 Mar 2012
Cr/Card		01 Mar 2012

Start Date: 1 MAR 2012 D

Runs every: 2 week

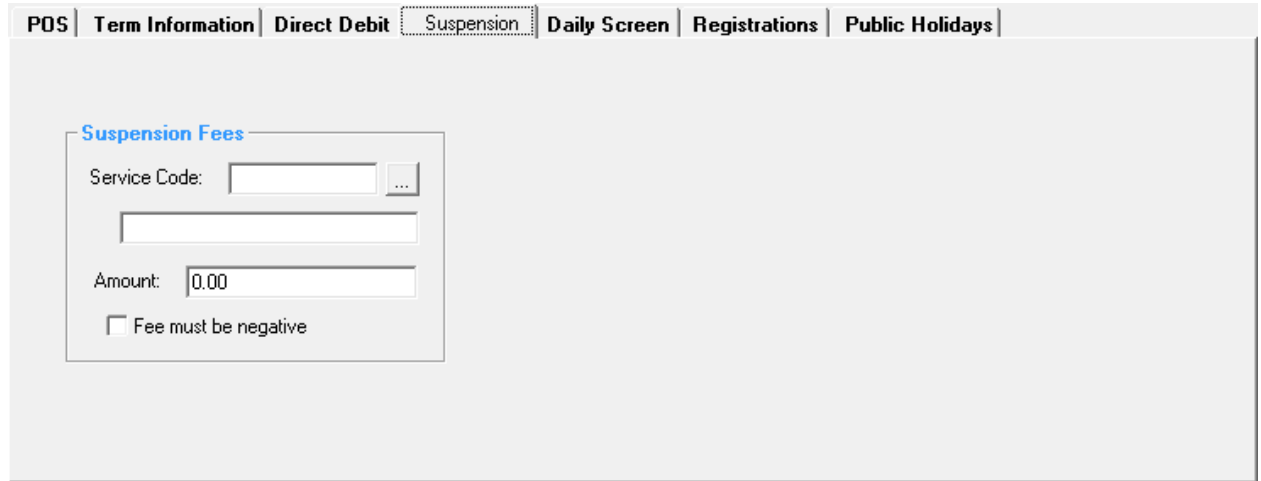
OK Cancel


Read through the statement carefully before changing any dates

**N.B. Changes made to existing entries will affect the memberships immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

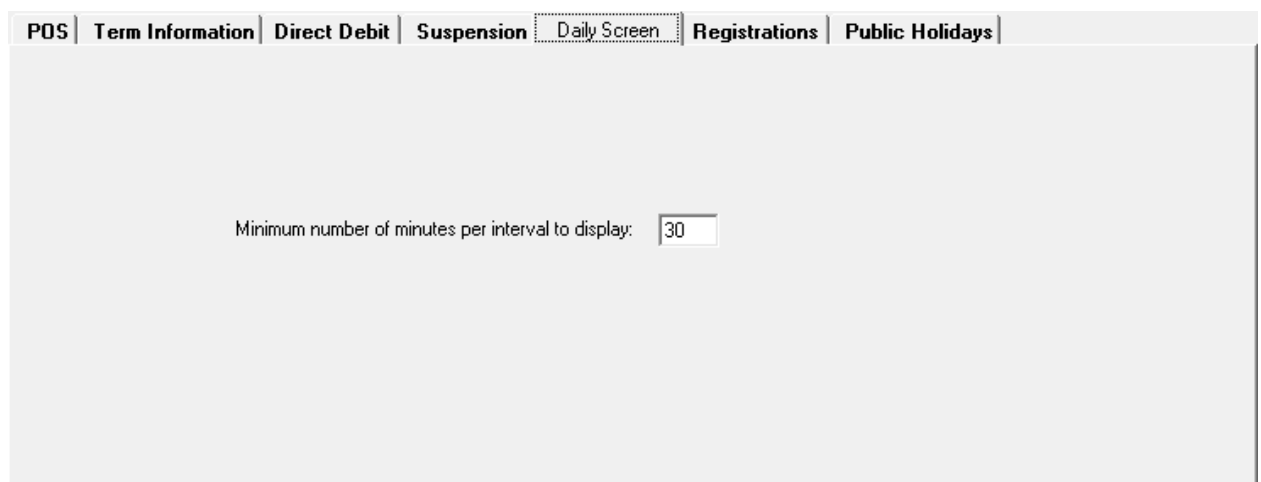
Admin > Classes > Class Types > Suspension

This window will allow you to assign a suspension fee against any class enrolment that suspends a class linked to this class type.



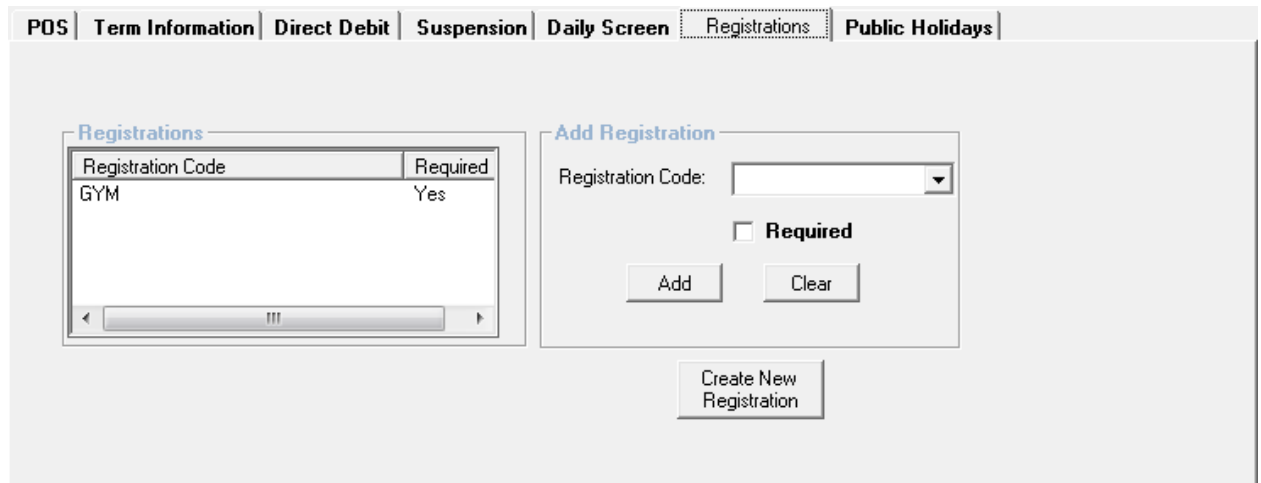
- Service Code                      Click on the  to select the Service Code you would like to assign the fee
- Amount                              The amount will be generated if the Service has been assigned a value in set up. If the value has not been assigned, you can type in a value as the suspension fee
- Fee must be Negative              Check this box if you wish the suspension fee to always be negative

Admin > Classes > Class Types > Daily Screen




If your classes start at 15 or 45 minutes past the hour, set as 15, otherwise set as 30





### Registrations

Listed are the Registrations allocated to this Class Type. To Delete a Registration Type from the Class Type, highlight the Registration Code and click the .

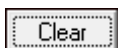
### Add Registration

Registration Code Use the  button to select from the Registration Types

Required A required Registration Type means that a student cannot be enrolled into a class without this registration fee allocated to their account. It does not need to be paid at the time of booking



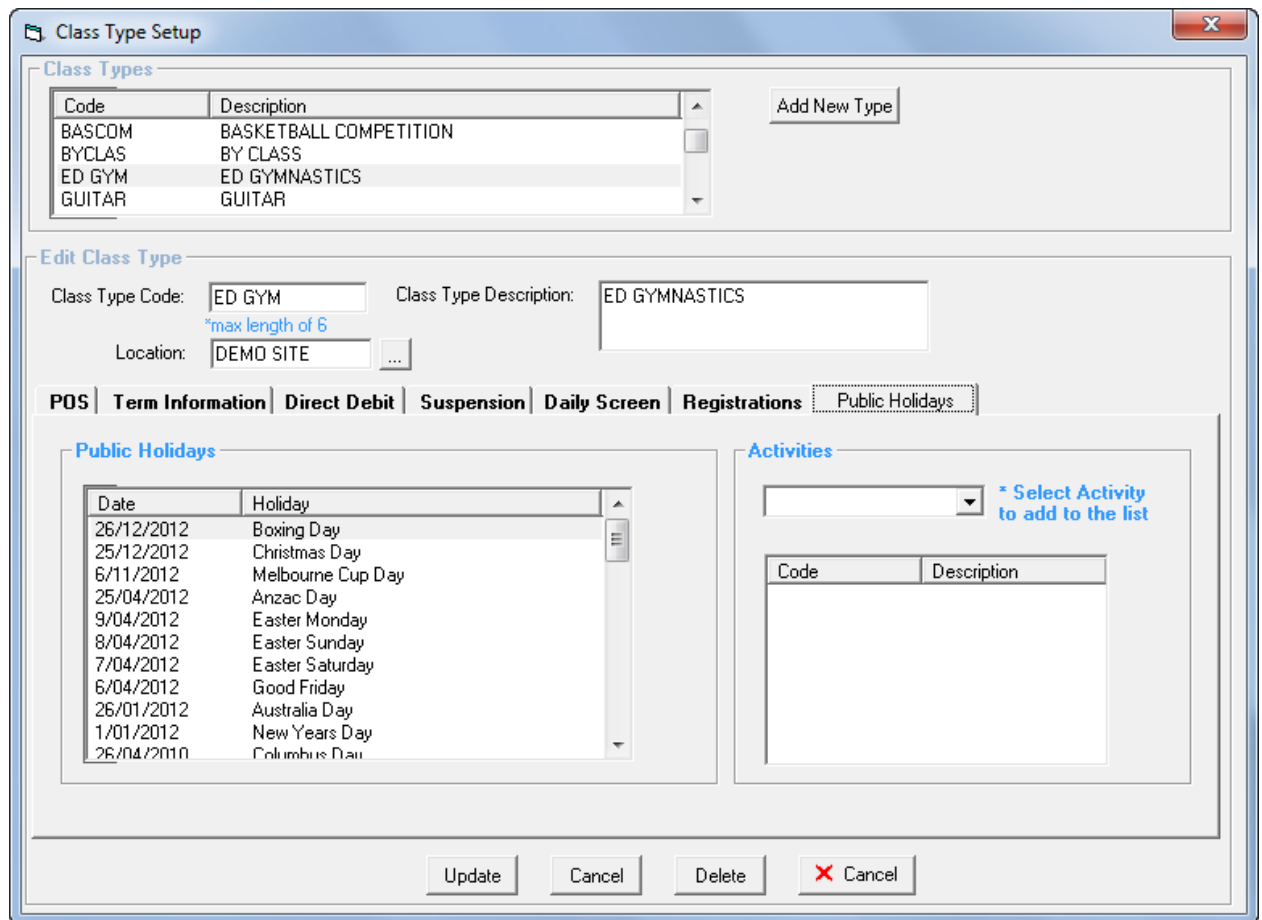
Add the selected Registration to the Class Type



Clear the above selection



Opens the Registration Setup screen. See Admin > Classes > Registration Types



### Public Holidays

Listed are the Public holidays that have been setup and assigned to this Class Type. See Admin > Admin > Setup Public Holidays

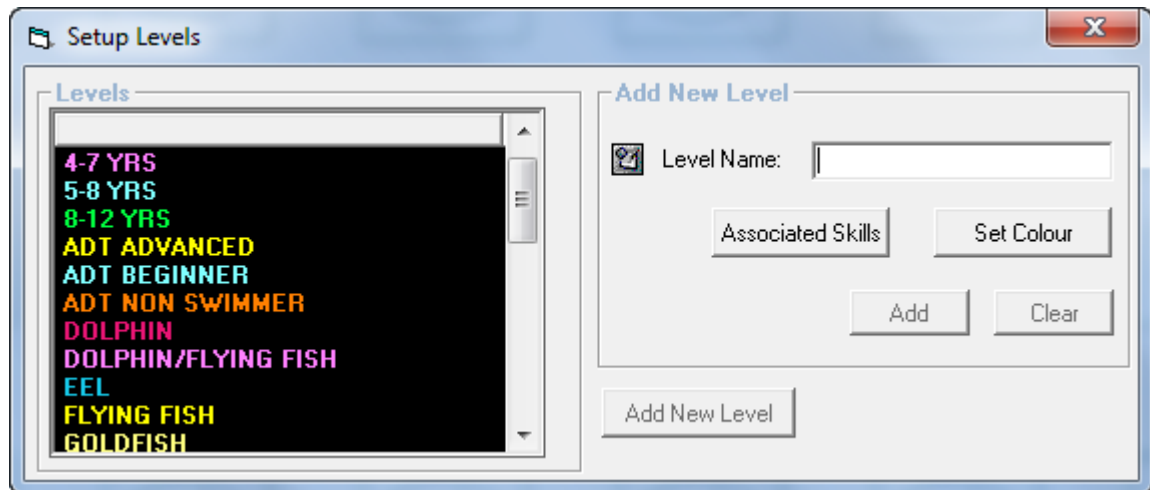
### Activities

These activities are used as part of the Members Survey process that is integrated with POS. When activated, upon recording a visit at the POS for all Students or customers with Memberships and Visit Passes, a dialog box will be displayed listing the activities allocated to the Class Type, Membership or Visit Pass. It is then possible to select the activities and save the information. An activities report can then be produced that displays what activities students, members and visit pass holders are utilising.

## Levels

Admin > Classes > Levels


This window is used to set up levels to be assigned to classes and also the skills required for a student to complete the level



### Levels

Listed are the Levels already set up.

### Edit Level

Click on the Level to highlight. Make the appropriate changes to the Level and .

### Delete Level

Click on the Level to highlight, then click the .

Note: Levels cannot be deleted if there are Classes currently using this Level.

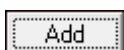
### Add New Level

#### Level

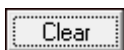
Type in the name of the level to be created



You have the option of assigning different colours to levels. When searching for a level within the Visual Scheduler, they will be easily distinguished



Click on the Add button to assign the level to the list

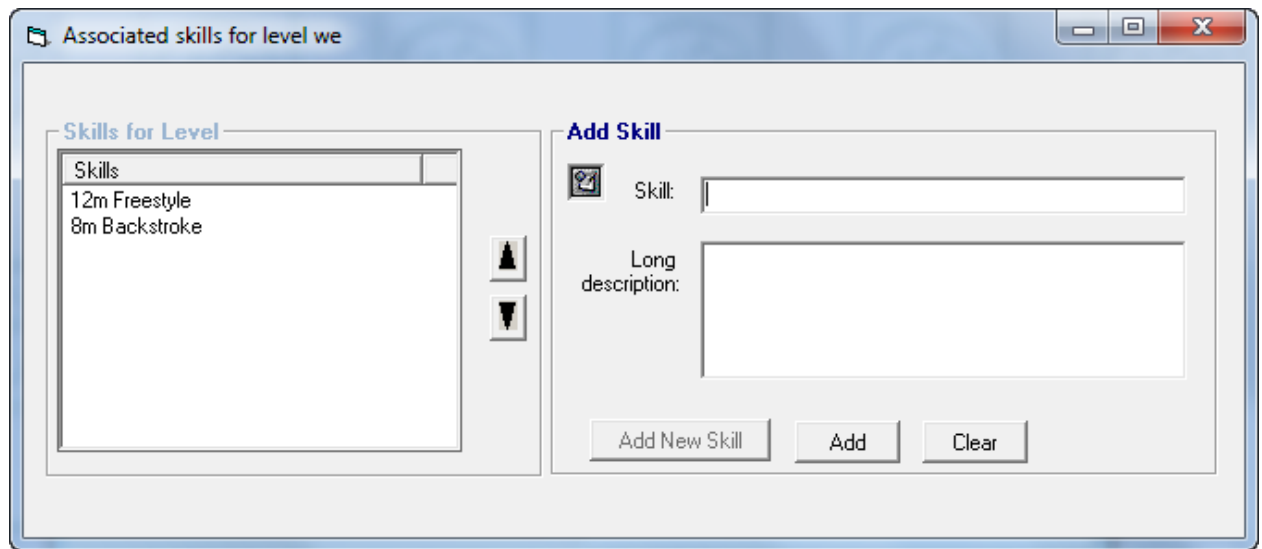


Click on the Clear button the clear the new level entry

**Note. Changes made to existing entries will affect the operation of the Classes Module immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

Add New Skills

Click on 

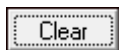


Skill                                      Enter the skill required

Long Description                      Enter further detail regarding the required skill. The Long Description will be printed on Reports that incorporate skills.



Click Add to assign to the list of Skills for Level



Click Clear to remove the entered Skill details

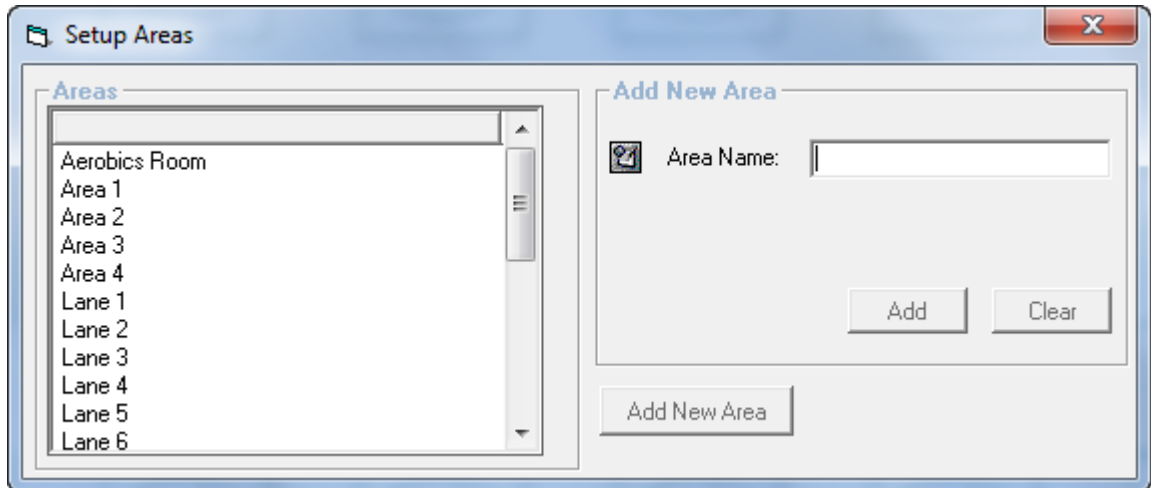


Click to add a new skill to the level

## Areas

Admin > Classes > Areas


This window is used to set up areas to be allocated to classes. You first must set up your areas before setting up classes. As an example the areas can be used to differentiate areas of the facility to suit the classes being run.



### Areas

Listed are the Areas already set up.

### Edit Area

Click on the Area to highlight. Make the appropriate changes to the Area and .

### Delete Area

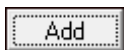
Click on the Area to highlight, then click the .

Note: Areas cannot be deleted if there are Classes currently using this Area.

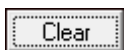
### Add New Level

#### Area Name

Type in the name of the Area to be created



Click on the Add button to assign the level to the list



Click on the Clear button the clear the new level entry

**Note. Changes made to existing entries will affect the operation of the Classes Module immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

## Classes

Admin > Classes > Classes

This window is used to set up all your classes. Before proceeding with this screen you will first need to set up the following requirements:


Level                   Admin > Classes > Levels

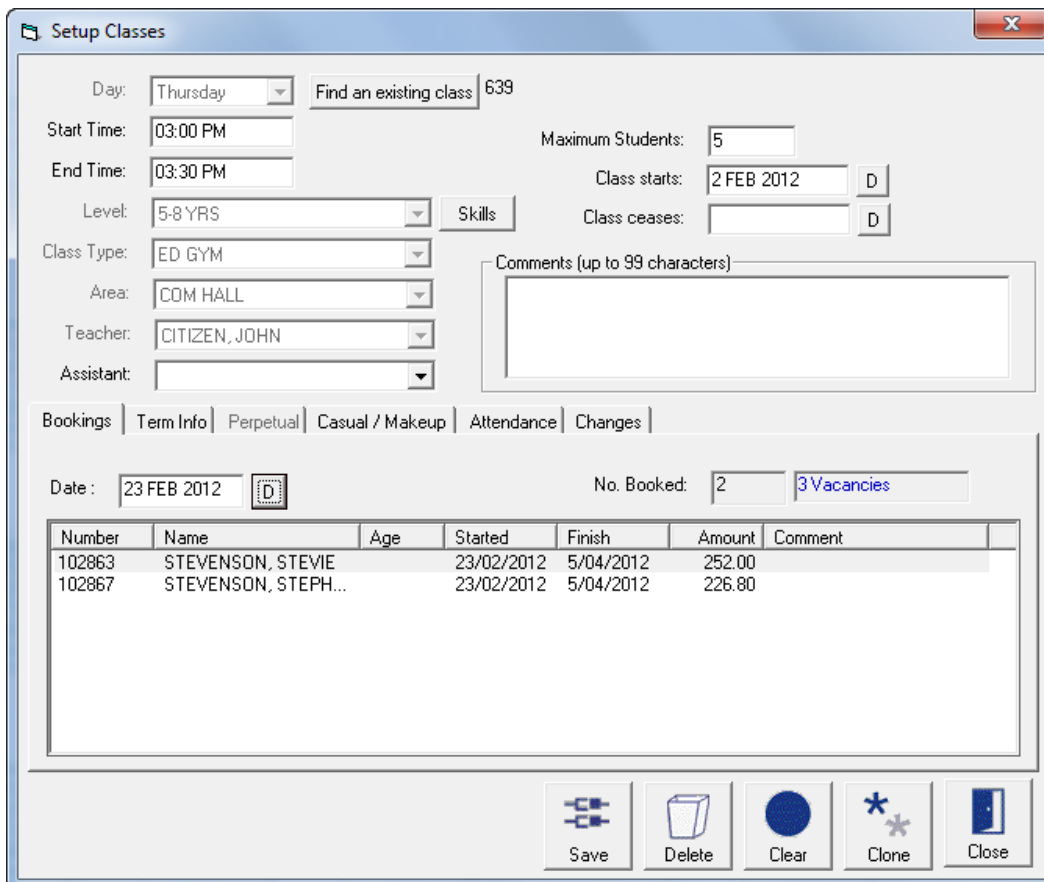
Class Type            Admin > Classes > Class Type

Teacher               Admin > Security > Staff Members

Area                   Admin > Classes > Areas

Term Dates           Admin > Classes > Terms

If you want to edit an existing class click on  and go through the search options to nominate the class. You can filter your selection by class type, teacher, level and day (you can nominate more than one day)



**Setup Classes**

Day: Thursday  639

Start Time: 03:00 PM                   Maximum Students: 5

End Time: 03:30 PM                    Class starts: 2 FEB 2012

Level: 5-8 YRS                    Class ceases:

Class Type: ED GYM

Area: COM HALL

Teacher: CITIZEN, JOHN

Assistant:

Comments (up to 99 characters)

Bookings | Term Info | Perpetual | Casual / Makeup | Attendance | Changes

Date: 23 FEB 2012                    No. Booked: 2

Number	Name	Age	Started	Finish	Amount	Comment
102863	STEVENSON, STEVIE		23/02/2012	5/04/2012	252.00	
102867	STEVENSON, STEPH...		23/02/2012	5/04/2012	226.80	

Save   Delete   Clear   Clone   Close

Day	Enter the day you wish this class to run. Click on <input type="text"/> to nominate the day
Start Time	Type in the starting time of the class
End Time	Type in the end time of the class
Level	Click on the <input type="text"/> to select the Level
Class Type	Click on the <input type="text"/> to select the Class Type
Maximum Students	Type in the maximum number of students you will allow to be booked for this class
Teacher	Click on the <input type="text"/> to select the Teacher
Assistant	Click on the <input type="text"/> to select the Assistant Teacher. This field is not compulsory
Area	Click on the <input type="text"/> to select the Area
Class Starts	<p>If set up as a "Term Only" or "Perpetual and Term" class type, the date will default to the next date of the chosen day of this class, within the term dates allocated against the class type. If the class type has been set up as a "Perpetual Only", the class start date will be the next available day from the start of the scheduled commencement date.</p> <p>You also have the option of changing the defaulted start date for the class, you may want this class to start on another week after the term starts.</p>
Class Ceases	Enter in a cease date only if this class is not to be used in the current or future terms

Admin > Classes > Classes > Bookings

Bookings | Term Info | Perpetual | Casual / Makeup | Attendance | Changes

Date:   No. Booked:

Number	Name	Age	Started	Finish	Amount	Comment
102863	STEVENSON, STEVIE		23/02/2012	5/04/2012	252.00	
102867	STEVENSON, STEPH...		23/02/2012	5/04/2012	226.80	

**Date** Enter a Date to display which students have been booked into this class on said date.

The number of booked students and number of vacancies will be displayed for the day nominated

**No. Booked** The number of students booked at the specified date, and the number of vacancies in the class

Admin > Classes > Classes > Term Info

This window displays the Term dates that have been scheduled for the Class Type allocated to this class.

Bookings | Term Info | Perpetual | Casual / Makeup | Attendance | Changes

**This term**

Term 1 2012

27 Jan 2012 to 05 Apr 2012

Cost per lesson: \$

Concession cost: \$

**Next term**

Term 2 2012

24 Apr 2012 to 29 Jun 2012

Cost per lesson: \$

Concession cost: \$

**This Term**

**Cost per Lesson** Type in the cost per lesson for this class if run on a term basis. When taking a booking for a student against this class, Links will automatically work out the number of lessons remaining by the scheduled term dates and multiply it by the cost per lesson to determine the fee to be



charged for the booking

Concession Cost      You can also nominate a second cost option against this class

Next Term

This window displays the Terms dates for the following term which have been scheduled for the Class Type allocated to this class. If the next term has not yet been assigned, you are not required to fill in the 'Cost per Lesson or Alternate Cost'".

*Admin > Classes > Classes > Perpetual*

This window is used to allocate the value against the direct debit billing period as per the Class Type assigned to this class.

Bookings | Term Info | **Perpetual** | PAYG | Casual / Makeup | Attendance | Changes

Direct Debit billing period is once every 1 months.

Cost: \$

Concession cost: \$

\*\* Only enter a Prorata per lesson if you dont want the system to automatically calculate prorata based on lessons per month.

	Full	Concession
Prorata cost per lesson: \$	<input type="text" value="17.00"/>	<input type="text" value="13.60"/>
Prorata cost 2nd lesson: \$	<input type="text" value="34.00"/>	<input type="text" value="27.20"/>
Prorata cost 3rd lesson: \$	<input type="text" value="51.00"/>	<input type="text" value="40.80"/>
Prorata cost 4th lesson: \$	<input type="text" value="68.00"/>	<input type="text" value="54.40"/>
Prorata cost 5+ lessons: \$	<input type="text" value="68.00"/>	<input type="text" value="54.40"/>

Cost      Type in the value you would like the class to be charged per frequency term

Concession Cost      You also have the option of setting an alternate cost to be charged for this class

Pro rata Cost

Use the table to if you wish to override the auto-calculation utilised by the system. By filling in the amounts for each lesson cost, the direct debit process will use the amounts assigned. You can enter both concession and standard cost pro rata.

Admin > Classes > Classes > Casual/Makeup

Allocate the Prices associated with Casual and Makeup bookings for this Class.

Bookings | Term Info | Perpetual | **Casual / Makeup** | Attendance | Changes

**Casual Booking Prices**

Cost: \$

Concession cost: \$

**Makeup Booking Price**

Makeup Fee: \$

### Casual Booking Prices

**Cost** Type in the value you would like to charge per Class for Casual Bookings

**Concession Cost** You also have the option of setting an Alternate cost to be charged for this class

### Makeup Booking Price

**Makeup Fee** Type in the value you would like to charge per Class for Makeup Bookings. If you wish for Makeups to be free, leave the Price as \$0

Admin > Classes > Classes > Attendance

The Attendance window will show the attendances for this class for any given period. This is a view only window.

Bookings | Term Info | Perpetual | Casual / Makeup | **Attendance** | Changes

From:   To:

Date	Attended	MakeUp	Cancelled	Vacancies	Teacher
16/02/2012	0	0	0	5	CITIZEN, JOHN
23/02/2012	2	0	0	3	CITIZEN, JOHN

From  Click on the  to select the 'from' date for this class

To  Click on the  to select the 'to' date for this class





Click this icon to list the number of attendances, make-ups, cancellations and vacancies for this class during the nominated period


*Admin > Classes > Classes > Changes*

You can change the level, area and teacher by date, e.g. this enables you to enter a teacher change for the following term.

Date	Level	Area	Teacher
28/06/2012	5-8 YRS	COM HALL	CITIZEN, JOHN
21/06/2012	5-8 YRS	COM HALL	CITIZEN, JOHN
14/06/2012	5-8 YRS	COM HALL	CITIZEN, JOHN
7/06/2012	5-8 YRS	COM HALL	CITIZEN, JOHN
31/05/2012	5-8 YRS	COM HALL	CITIZEN, JOHN
24/05/2012	5-8 YRS	COM HALL	CITIZEN, JOHN

From: 23 APR 2012  To:   Teacher: <<No Change>>   
 Level: 8-12 YRS  Area: Area 3  Apply   
[You cannot change the Level for past Lessons](#)

To apply classes changes:

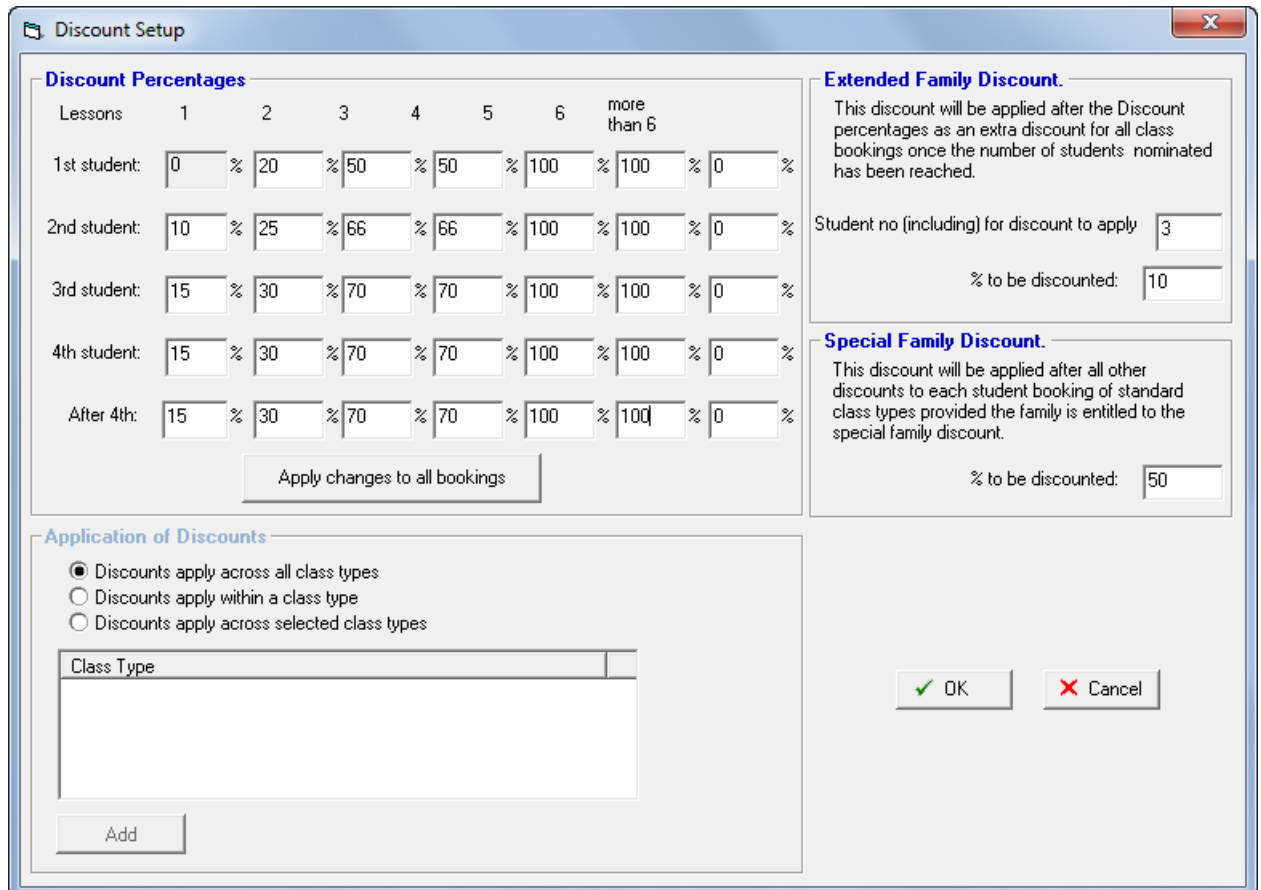
1. Enter the date from
2. Enter a date to if applicable
3. Enter the level to be changed to if required
4. Enter a new teacher if required
5. Enter a new area if required
6. Click on 

**Note: Changes made to existing entries will affect the operation of the Classes Module immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

## Discounts

Admin > Classes > Discounts

The Discounts screen is used to assign discounts to family members who may have members participating in more than one program or multiple family members participating in a class. Links will automatically calculate the discount to be given for 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> and more than 4 students as well as an individual student participating in more than one class. The discount, as a percentage, will be calculated off the 'Cost per lesson' and/or the 'Direct Debit billing charge'.



**Discount Setup**

**Discount Percentages**

Lessons	1	2	3	4	5	6	more than 6
1st student:	0 %	20 %	50 %	50 %	100 %	100 %	0 %
2nd student:	10 %	25 %	66 %	66 %	100 %	100 %	0 %
3rd student:	15 %	30 %	70 %	70 %	100 %	100 %	0 %
4th student:	15 %	30 %	70 %	70 %	100 %	100 %	0 %
After 4th:	15 %	30 %	70 %	70 %	100 %	100 %	0 %

Apply changes to all bookings

**Extended Family Discount.**  
This discount will be applied after the Discount percentages as an extra discount for all class bookings once the number of students nominated has been reached.  
Student no (including) for discount to apply: 3  
% to be discounted: 10

**Special Family Discount.**  
This discount will be applied after all other discounts to each student booking of standard class types provided the family is entitled to the special family discount.  
% to be discounted: 50

**Application of Discounts**

- Discounts apply across all class types
- Discounts apply within a class type
- Discounts apply across selected class types

Class Type

Add

OK Cancel

### Discount Percentages

Lesson 1-6+

These figures represent the number of classes a student can be booked into where discounts will be recognised and calculated

1st Child


Type in the discount to be allocated for the first child against the number of classes. Leave blank if you do not wish to allocate a discount. The automatic default is 0% discount for one child booked into one class only

2nd, 3rd, 4th Child      Type in the discount to be allocated for the 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> or more child or leave blank

#### Application of Discounts

Discounts Apply Across All Class Types      Choosing this option will apply a discount against all the class types you have created

Discounts Apply Within a Class Type      Choosing this option will apply a discount against students who are booked into the same class type. Eg: If you have 3 students who belong to the one family and two students are booked into the 'Gymnastics Class Type' and one student is booked into the 'School Age Lesson Class Type', only the children booked into the same class type will be eligible for discounts

Discounts Apply Across Selected Class Types      Choosing this option will allow you to nominate class types. You can nominate more than one. Click on the  to select the class types.

#### Extended Family Discounts

This feature allows for an additional family discount to be applied over and above any other Class discounts.

Student no (including) for discount to apply      Indicate how many students from the family must be enrolled for discount to take affect

% to be discounted      Enter the percentage value to be discounted

#### Special Family Discount

The Special Family Discount allows users to give families another discount that is applied after all other discounts have already been applied. For a family to receive the Special Family Discount, the check box must be ticked in the Family Screen.

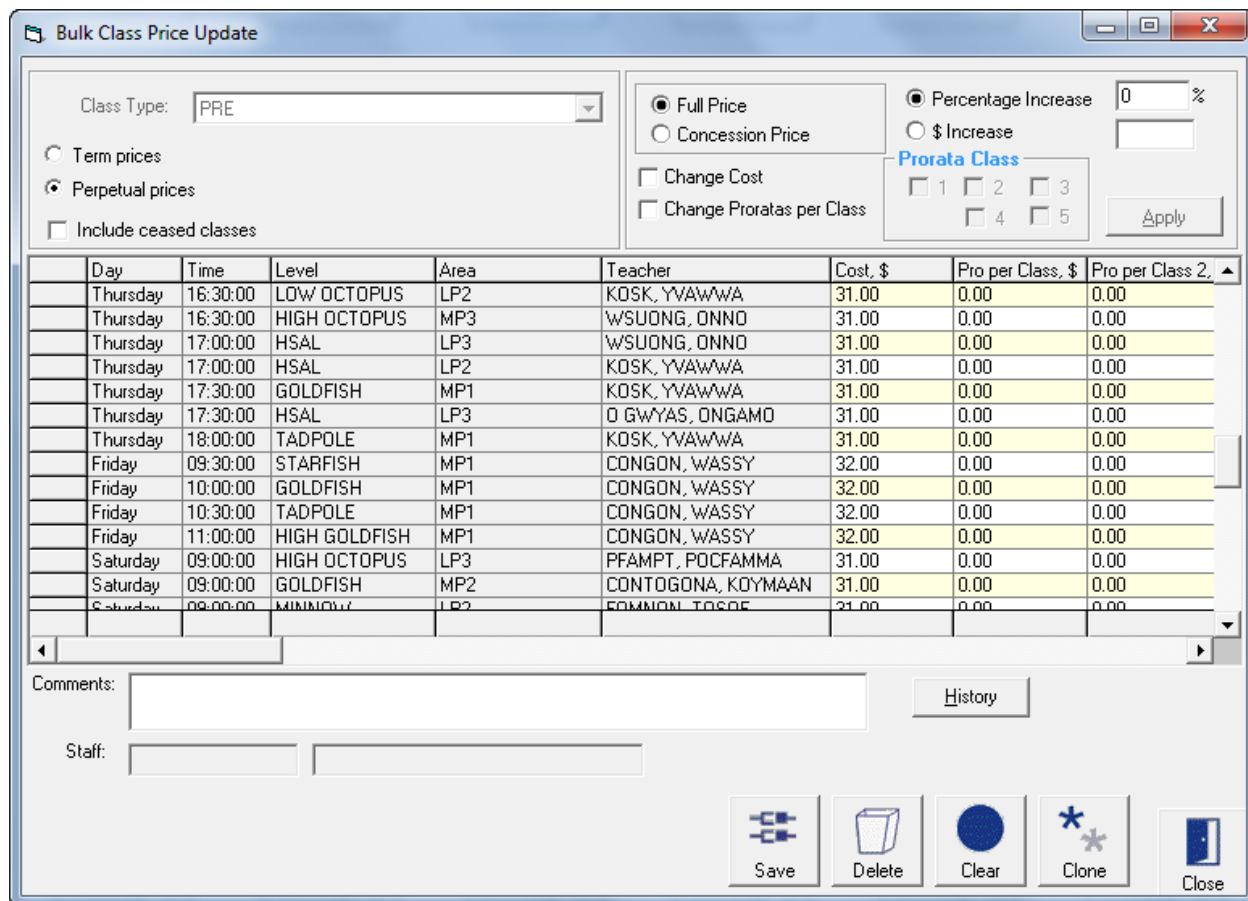
% to be discounted      Enter the percentage value to be discounted

Note: If a term booking has already been made, ticking the Special Family Discount check box with have no effect on the charge. However if a perpetual booking exists within the family then the discount will be applied to subsequent debit runs.

## Bulk Class Price Update

Admin > Classes > Bulk Class Price Update


This window will change prices by Class Type and increases can be made to standard, alternate and pro rata cost.



Day	Time	Level	Area	Teacher	Cost, \$	Pro per Class, \$	Pro per Class 2, \$
Thursday	16:30:00	LOW OCTOPUS	LP2	KOSK, YVAWVA	31.00	0.00	0.00
Thursday	16:30:00	HIGH OCTOPUS	MP3	WSUONG, ONNO	31.00	0.00	0.00
Thursday	17:00:00	HSAL	LP3	WSUONG, ONNO	31.00	0.00	0.00
Thursday	17:00:00	HSAL	LP2	KOSK, YVAWVA	31.00	0.00	0.00
Thursday	17:30:00	GOLDFISH	MP1	KOSK, YVAWVA	31.00	0.00	0.00
Thursday	17:30:00	HSAL	LP3	O GWYAS, ONGAMO	31.00	0.00	0.00
Thursday	18:00:00	TADPOLE	MP1	KOSK, YVAWVA	31.00	0.00	0.00
Friday	09:30:00	STARFISH	MP1	CONGON, WASSY	32.00	0.00	0.00
Friday	10:00:00	GOLDFISH	MP1	CONGON, WASSY	32.00	0.00	0.00
Friday	10:30:00	TADPOLE	MP1	CONGON, WASSY	32.00	0.00	0.00
Friday	11:00:00	HIGH GOLDFISH	MP1	CONGON, WASSY	32.00	0.00	0.00
Saturday	09:00:00	HIGH OCTOPUS	LP3	PFAMPT, POCFAMMA	31.00	0.00	0.00
Saturday	09:00:00	GOLDFISH	MP2	CONTOGONA, KOYMAAN	31.00	0.00	0.00
Saturday	09:00:00	MINNOW	LP2	COMMON TADPOLE	31.00	0.00	0.00

Use this window to update "Costs per lesson" against term class types and "Costs per billing period" for perpetual class types by a percentage value. You also have the option of manually changing values against particular classes. Changes will occur instantaneously once the save button is pressed.

Class Type

Click on the  to nominate the class type to be changed. Only one class type can be changed at a time

Term and Perpetual Prices

The appropriate frequency method will be highlighted depending on the class type. If the class type has been set up as a monthly and term frequency, you will be able to move between perpetual and term prices to make the relevant changes for that class type. You must save after each change

## Apply Increases

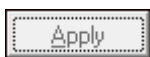
### 1. Select the appropriate Price to be changed

Full Price	Select if affecting a change to the Full Price for the Classes selected – Admin > Classes > Classes > Term Info/Perpetual
Concession price	Select if affecting a change to the Concession Price for the Classes selected – Admin > Classes > Classes > Term Info/Perpetual
Change Cost	Tick check box to affect change to entire Cost Column of Classes selected – this column represents the appropriate cost price whether Term or Perpetual
Change Pro ratas per Class	Tick check box to select Pro ratas per class by check box – Admin > Classes > Classes > Perpetual – Pro rata Cost
Prorata Class 1-5	Select which Pro rata class columns to affect change

### 2. Enter the Increase to be applied to specified Prices for the selected Classes

Percentage Increase	Select to increase the current prices by the entered percentage
\$ Increase	Select to increase the current prices by a dollar amount

### 3. Apply the change



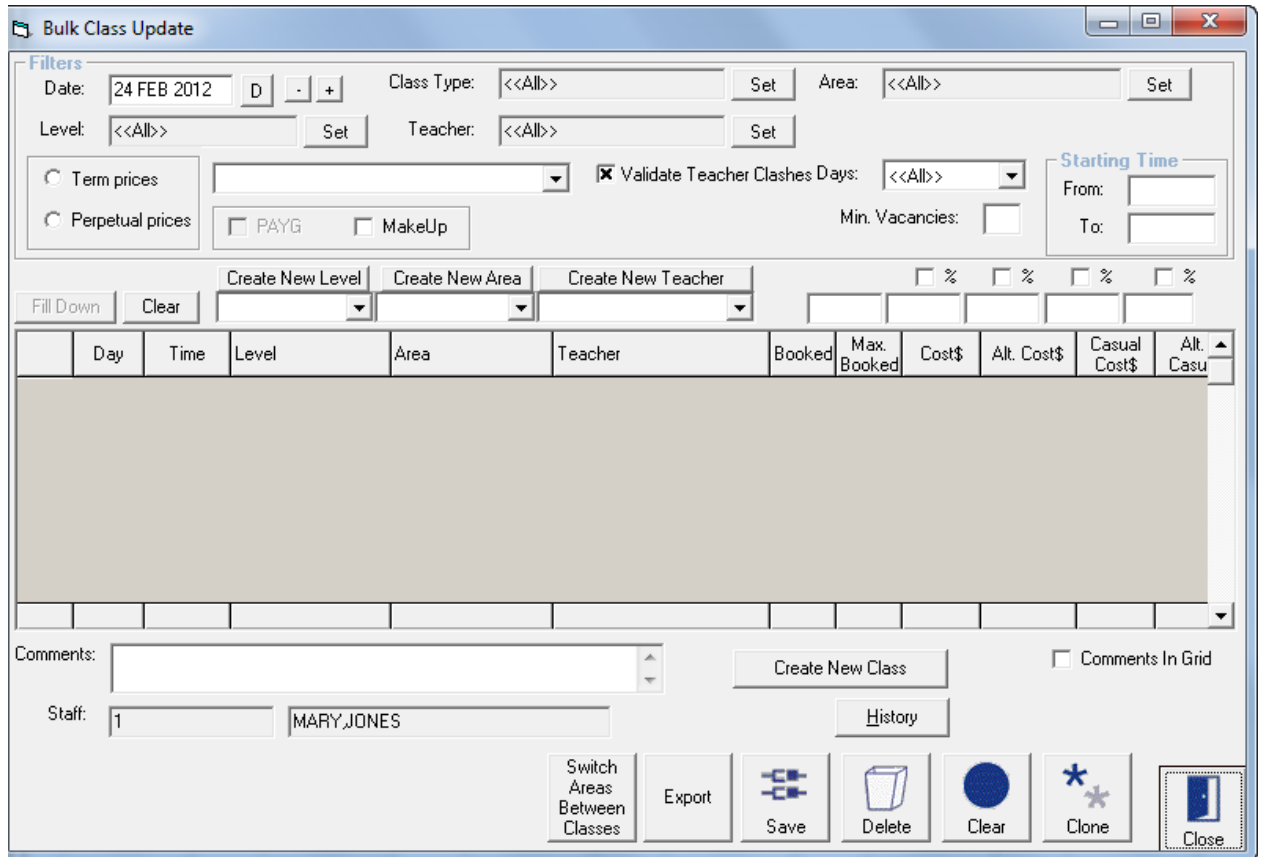
Click this icon to affect the price increase

**N.B. Changes made to existing entries will affect the operation of the Classes Module immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

## Bulk Class Update

Admin > Classes > Bulk Class Update

The Bulk Class Update screen enables you to change class settings in bulk. You can change the Level, Area, Teacher and Prices through this screen. If comments have been added in the class setup screen you can also view these here.



Ensure that that the Filtered options are accurate and the entirety of selected classes is to be updated

Class Type                      Select the class types you wish to view for amendment

Teacher                              Select the teachers you wish to view for amendment

Days                                      Select the days you wish to view for amendment

Level                                      Select the levels you wish to view for amendment

Area                                      Select the area you wish to view for amendment



Min Vacancies                      Enter a number of minimum vacancies or leave blank




Starting Time                      Enter a time range or leave blank to view all

Changing the level, area or teacher

You can view the classes matching your selected criteria in a different order by clicking on the top on the column. (Day, Time, Level etc)

1. Click on the  to select the level, area or teacher you wish to update to
2. Click on 

Changing the price

3. Enter a new price or percentage into the field above the column you wish to change (if entering a percentage, tick the % check box)
4. Click on 

Switching classes between areas

1. Highlight the class you wish to change,
2. Click on "Switch areas between classes" and then select from the list of classes for that time the class you wish to change with



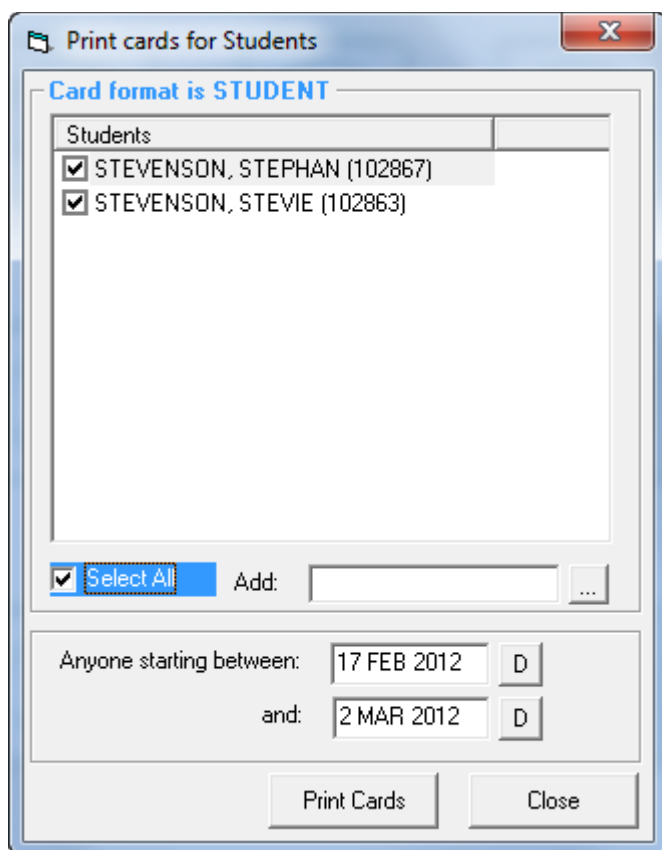
ClassId	Description	StartDate	EndDate	LessonDay	BeginTime	EndTime	Area	LessonLevel	TeacherName
551	LARA	23/11/2006		Thursday	15:00:00	16:00:00	LP4	EEL	FMYNN ,AM...
558	LARA	16/11/2006		Thursday	15:00:00	16:00:00	COM HALL	EEL	BOBBY, KOT...

## Viewing Comments

Flag the "Comments in Grid" check box to view the Class Setup comments. They will be displayed instead of the prices.

## Bulk Card Print

Admin > Classes > Bulk Card Print



As a new student is added to the system their name is included in the Bulk Card Print system.

Tick the box to select a student for printing. Once the card is printed their name is removed from the list.

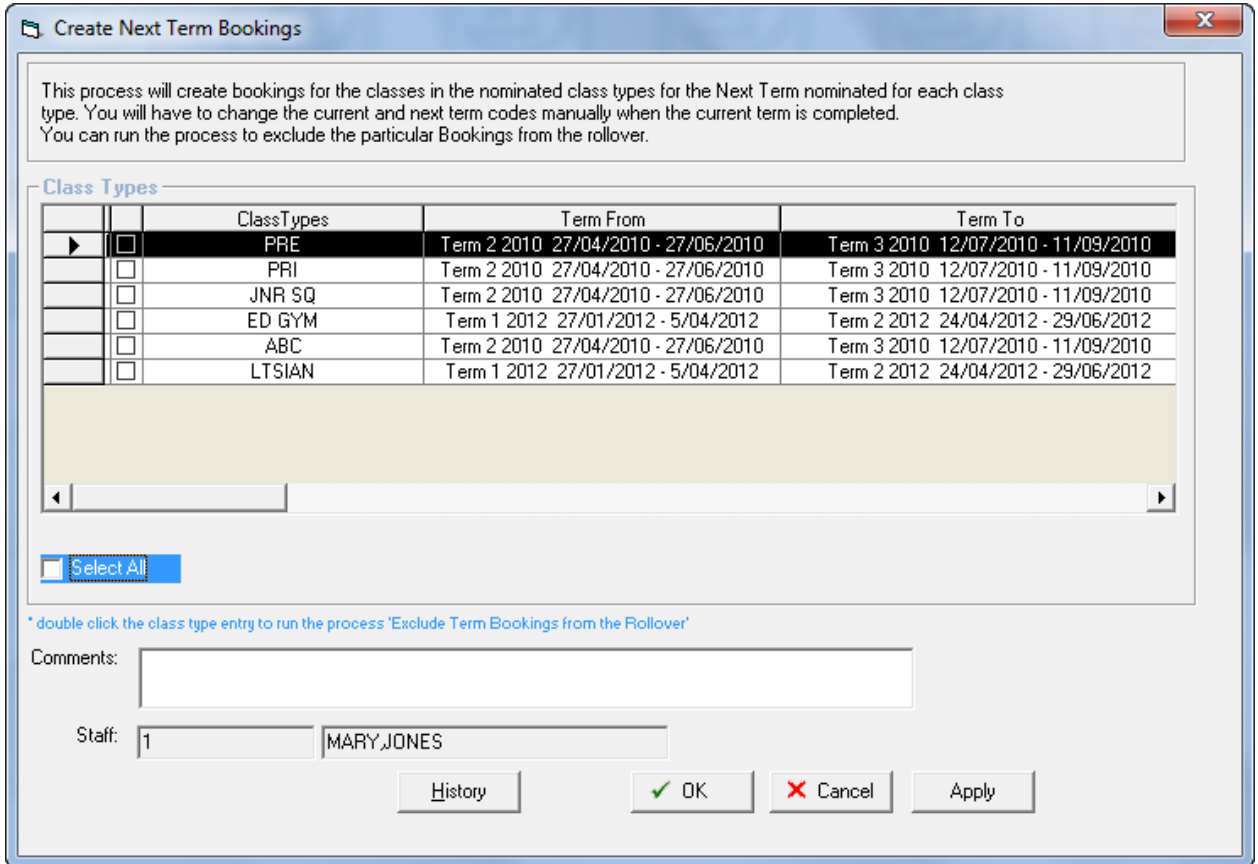
Alternatively a student can be added to the list by using the Add feature.

The card layout for the student card is defined at Admin > Admin > Cards

## Create Next Term Bookings

Admin > Classes > Create Next Term Bookings

This screen is used to rollover all students from one term to the next term. The process is only used for Class Type that is Term based or has a Term aspect as part of their setup.



This process will create bookings for the classes in the nominated class types for the Next Term nominated for each class type. You will have to change the current and next term codes manually when the current term is completed. You can run the process to exclude the particular Bookings from the rollover.

ClassTypes	Term From	Term To
PRE	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
PRI	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
JNR SQ	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
ED GYM	Term 1 2012 27/01/2012 - 5/04/2012	Term 2 2012 24/04/2012 - 29/06/2012
ABC	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
LTSIAN	Term 1 2012 27/01/2012 - 5/04/2012	Term 2 2012 24/04/2012 - 29/06/2012

Select All

\* double click the class type entry to run the process 'Exclude Term Bookings from the Rollover'

Comments:


Staff:

Before running this process it is important the following steps have been completed.

**Step One** The "Current term" and "Next term" information is correct for each Class Type that is to be selected. This information is found at Admin > Classes > Class Types > Term Information and is also displayed in the above window to allow confirmation

**Step Two** All lesson costs for the next term have been updated. This can be done using the Bulk Class Price Update screen – Admin > Classes > Bulk Price Update

Note: Bookings will not be created for "Next Term" for Classes that have a Cease Date prior to the start of the "Next Term".

Once this is complete, select the Class Type or Types in the screen above and press the  button. A message screen will be displayed indicating it is creating the bookings.

The outcomes of this process are:

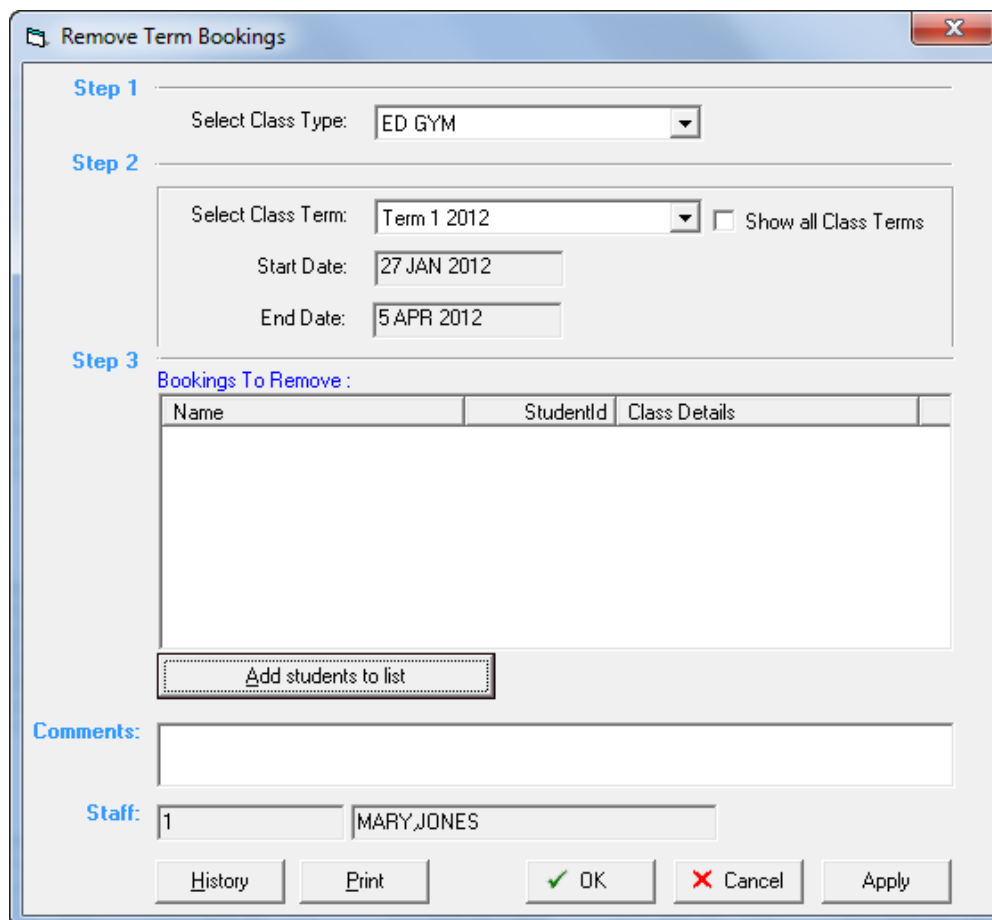
- Every student enrolled in the “Current term” will be re-enrolled into the “Next term” with the same booking details.
- Fees will be generated based on the per lesson cost and the number of lessons in the next term.

**Note: There is no reversal to this process once it has been completed!**

### Remove Term Bookings

Admin > Classes > Remove Term Bookings

This process will remove student bookings from a selected Term after the Create Next Term Bookings process has been completed. This process is only used for Class Types that are Term based or have a Term aspect as part of their setup.



**Remove Term Bookings**

**Step 1**

Select Class Type: ED GYM

**Step 2**

Select Class Term: Term 1 2012  Show all Class Terms

Start Date: 27 JAN 2012

End Date: 5 APR 2012

**Step 3**

Bookings To Remove :


Name	StudentId	Class Details

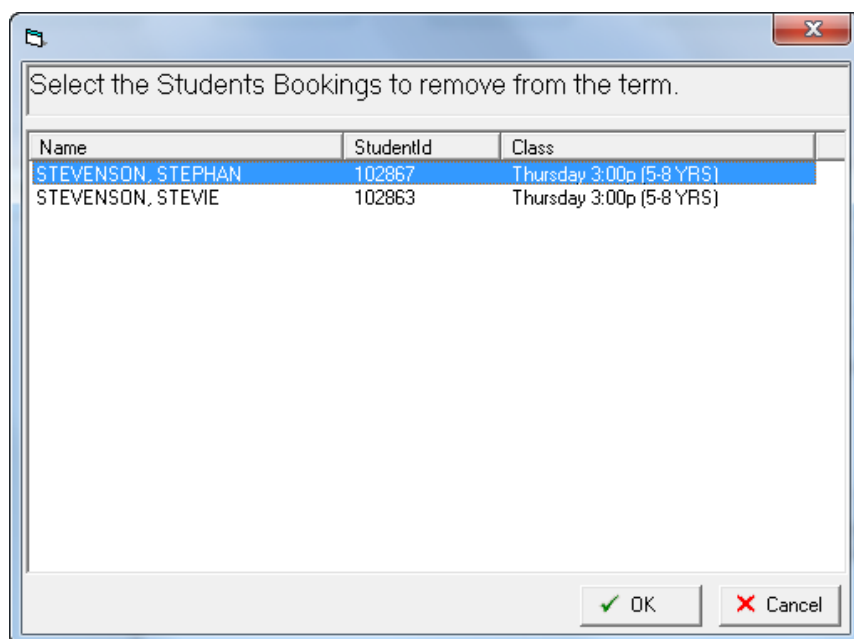
Add students to list


Comments:

Staff: 1 MARY,JONES

History Print OK Cancel Apply

- Step 1      Class Type      Select the Class Type
- Step 2      Select Class Term      Select the Term to remove Student Bookings from
- Step 3            Click this button to select from a list of Student Bookings in the Class Type and Term specified



Select the student/s whose bookings are to be removed from the term. More than one student can be selected by holding down the Control key. When finished press the  button. The selected students will now be displayed under Bookings to Remove.

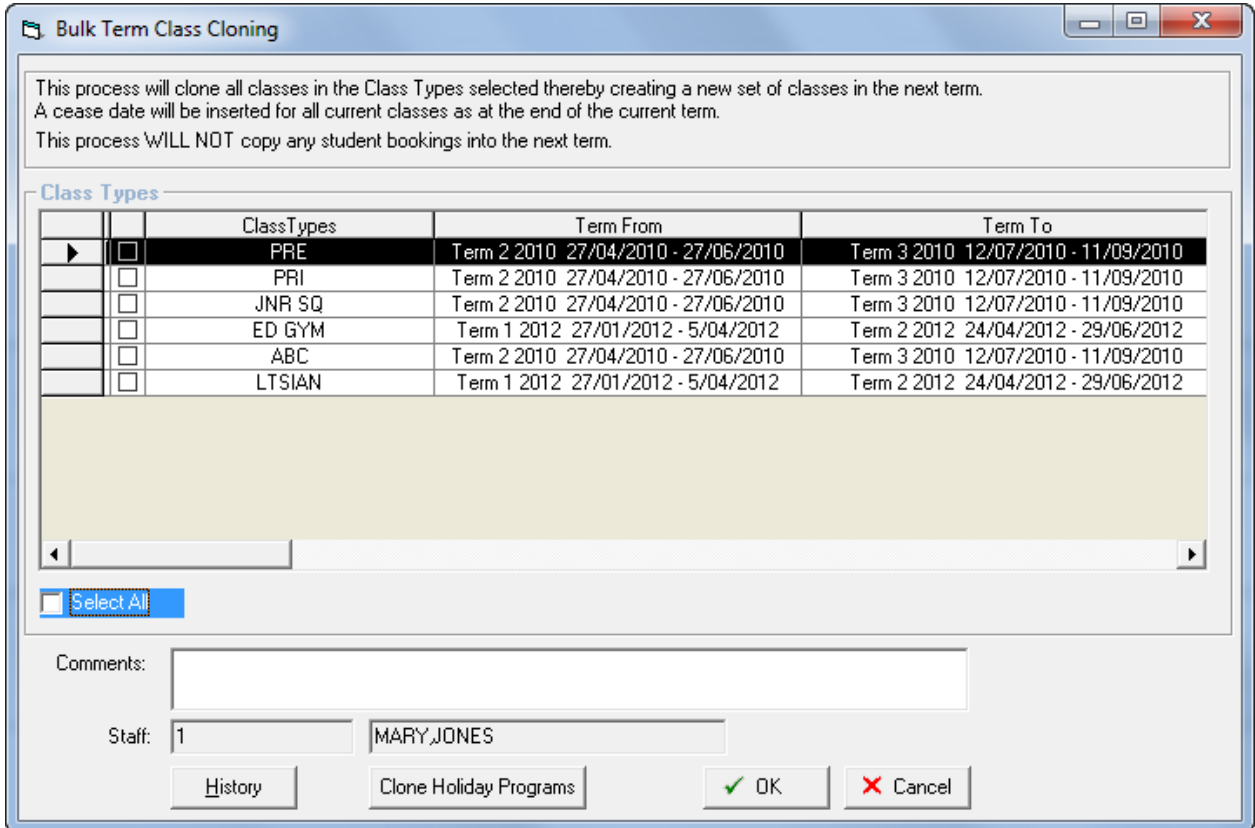
Note: Bookings will only be removed if there are no transactions allocated to the booking i.e. No fees have been paid for the booking and no attendance has been recorded for the student for the term affected at the time of running this process. If there has been a transaction an error screen will be display indicating that the student will need to be modified manually and will be excluded from the process.

## Bulk Term Class Clone

Admin > Classes > Bulk Term Class Clone

Bulk Term Class Clone will clone all classes that run within a Class Type on a TERM ONLY basis. It will create a cease date in line with the end date of the term and create new classes for the following term in line with the term dates set. This process allows you to manipulate classes prior to the term beginning without having to change your current class schedule.

Note: This process will not roll over any student bookings nor will student bookings be rolled over using the Create Next Term Booking process.



This process will clone all classes in the Class Types selected thereby creating a new set of classes in the next term. A cease date will be inserted for all current classes as at the end of the current term. This process WILL NOT copy any student bookings into the next term.

	ClassTypes	Term From	Term To
<input checked="" type="checkbox"/>	PRE	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
<input type="checkbox"/>	PRI	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
<input type="checkbox"/>	JNR SQ	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
<input type="checkbox"/>	ED GYM	Term 1 2012 27/01/2012 - 5/04/2012	Term 2 2012 24/04/2012 - 29/06/2012
<input type="checkbox"/>	ABC	Term 2 2010 27/04/2010 - 27/06/2010	Term 3 2010 12/07/2010 - 11/09/2010
<input type="checkbox"/>	LTSIAN	Term 1 2012 27/01/2012 - 5/04/2012	Term 2 2012 24/04/2012 - 29/06/2012

Select All

Comments:

Staff: 1 MARY,JONES

History Clone Holiday Programs

Step 1 Select the Class Types you wish to clone

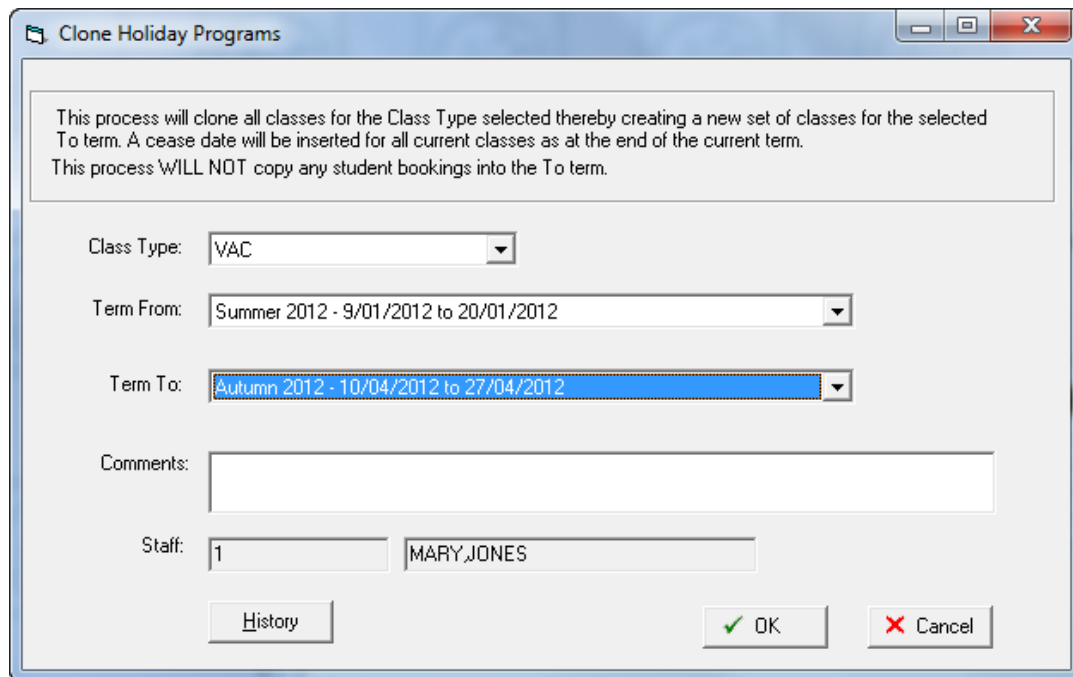
Step 2 Click on 

Step 3 A message will appear confirming the process has been completed

Admin > Classes > Bulk Term Class Clone > Clone Holiday Programs

Clone Holiday Programs will clone all classes that run within a Holiday Program Class Type. It will create a cease date in line with the end date of the term and create new classes for the following term in line with the Holiday Program term dates set. This process allows you to manipulate classes prior to the Holiday Program without having to change your current class schedule.

Note: This process will not roll over any student bookings nor will student bookings be rolled over using the Create Next Term Booking process.



This process will clone all classes for the Class Type selected thereby creating a new set of classes for the selected To term. A cease date will be inserted for all current classes as at the end of the current term. This process WILL NOT copy any student bookings into the To term.

Class Type: VAC

Term From: Summer 2012 - 9/01/2012 to 20/01/2012

Term To: Autumn 2012 - 10/04/2012 to 27/04/2012

Comments:

Staff: 1 MARY.JONES

History OK Cancel

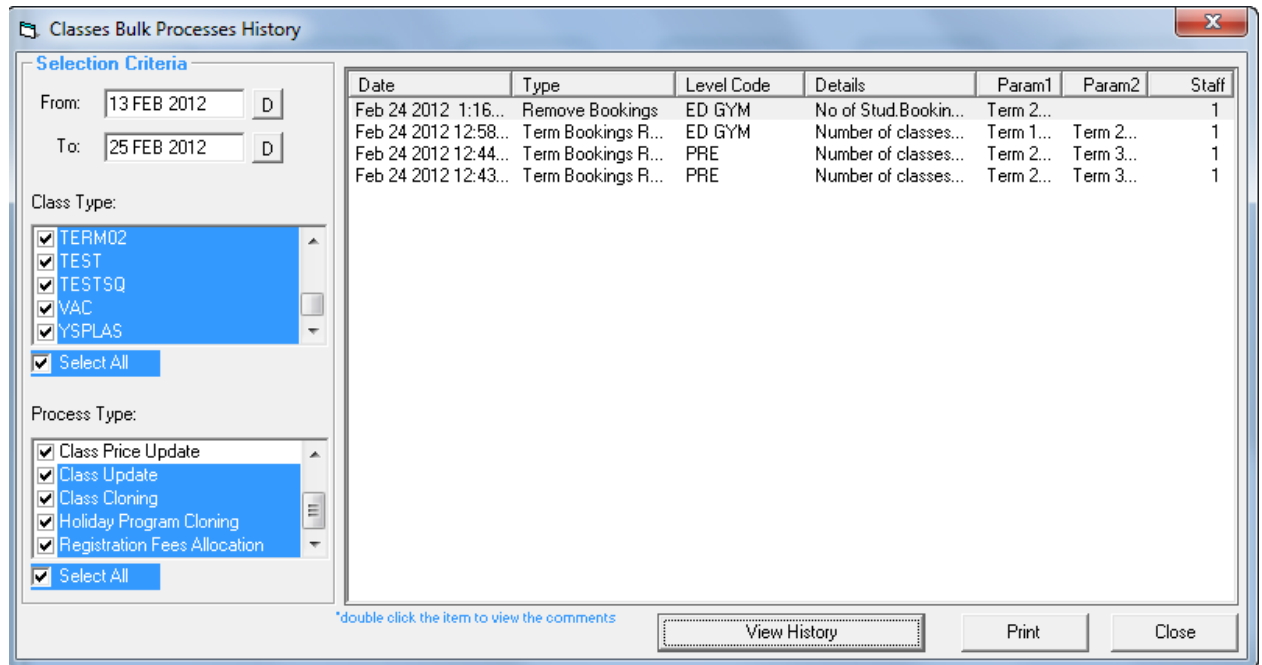
Class Type Using the ▼ select the Class Types you wish to clone

Term From Using the ▼ select the Holiday Program Term you wish to clone from

Term To Using the ▼ select the Holiday Program Term you wish to clone to

Admin > Classes > Bulk Processes History

The Bulk Processes History provides a log of the Classes Bulk Processes – Remove Term Bookings; Exclude Term Bookings from Rollover; Term Bookings Rollover; Class Price Update; Class Update; Class Update; Class Cloning; Holiday Program Cloning; Registration Fees Allocation.



In order to produce the required report, determine the Selection Criteria.

From/To                      Specify date range to view Bulk Process history

Class Types                 Select the Class Type/s

Process Type                Select the Process Types to view the history of

Click  to view the log for the selection



## Bulk Registration Fees Allocation

Admin > Classes > Bulk Registration Fees Allocation

The Bulk Registration Fees Allocation enables you to issue the registration fee for the next year/period to all active customers in bulk. You can exclude certain customers by unchecking the tick box on the right.

**Filters**

Registration Fees due to expire before:   [Override Prices available in Drop Down](#)

Registration:   [Renewal Date : 01 Jan 2013](#)

(Student Registration)

**Sort**

By Student

By Expiry Date

---

LTS ANNUAL REGISTRATION

	First Name	Last Name	Rego Expiry Date	Standard Amount, \$	Previous Charged Amount, \$	Amount Due to be Charged, \$	Nbr Current Bookings	Nbr Future Bookings	Includ in
	OPDO	OBGUMQZZ	31 Dec 2012	20.00	22.00	20.00	8	0	<input checked="" type="checkbox"/>
	POSY	OBSOFOP	31 Dec 2012	20.00	22.00	20.00	6	0	<input checked="" type="checkbox"/>
	WONOTFO	OGGOCOWW	31 Dec 2012	20.00	22.00	20.00	2	0	<input checked="" type="checkbox"/>
	ZOYG	OGGOCOWW	31 Dec 2012	20.00	22.00	20.00	2	0	<input checked="" type="checkbox"/>
	BOYG	OOKON	31 Dec 2012	20.00	22.00	20.00	2	0	<input checked="" type="checkbox"/>
	MOSO	OZOMT	31 Dec 2012	20.00	22.00	20.00	6	0	<input checked="" type="checkbox"/>
	OTOBAMMO	PANWMONG	31 Dec 2012	20.00	22.00	20.00	3	0	<input checked="" type="checkbox"/>
	WOPPY	POUNWOON	31 Dec 2012	20.00	22.00	20.00	2	0	<input checked="" type="checkbox"/>
	WOSO	PUSPFY	31 Dec 2012	20.00	22.00	20.00	2	0	<input checked="" type="checkbox"/>
	DAVID	SMITH	31 Dec 2012	20.00	22.00	20.00	8	0	<input checked="" type="checkbox"/>
	BAN	TKOMBACK	31 Dec 2012	20.00	22.00	20.00	4	0	<input checked="" type="checkbox"/>

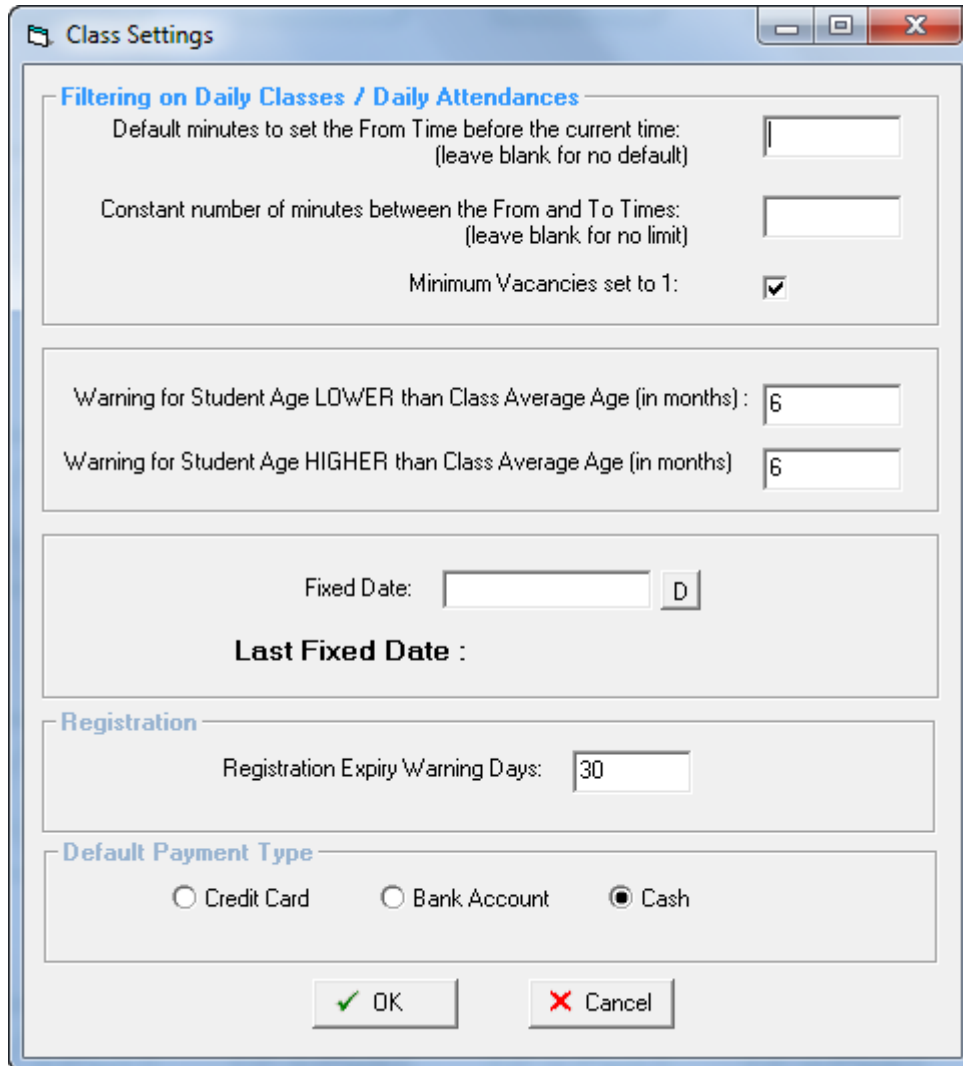
\*\*Double Click on grid to show Student Details

Staff:

Select All Students

## Class Settings

Admin > Classes > Class Settings



### Filtering on Daily Classes/Daily Attendances

Default minutes to set the From Time before the current time

For the Daily Attendances screen it will show the upcoming classes for the time period specified. For example if 60 minutes is entered, the bookings for classes in the next hour will be shown

Constant number of minutes between the From and To Times

This affects how many classes you will see on the Daily Attendances screen. Enter 60 minutes to see 1 hour worth of classes

Minimum Vacancies set to 1

Visual Scheduler will default to only show classes with a minimum vacancy of 1




Warning for Student Age LOWER than Class Average Age (in months)

User will be warned when booking in a student this many months younger than the class average

Warning for Student Age HIGHER than Class Average Age (in months)

User will be warned when booking in a student this many months older than the class average

Fixed Date

The  button in Visual Scheduler will go forward to the date defined

Registration

Registration Expiry warning days

According to the days set here, a reminder will display at POS when a registration fee is due to expire

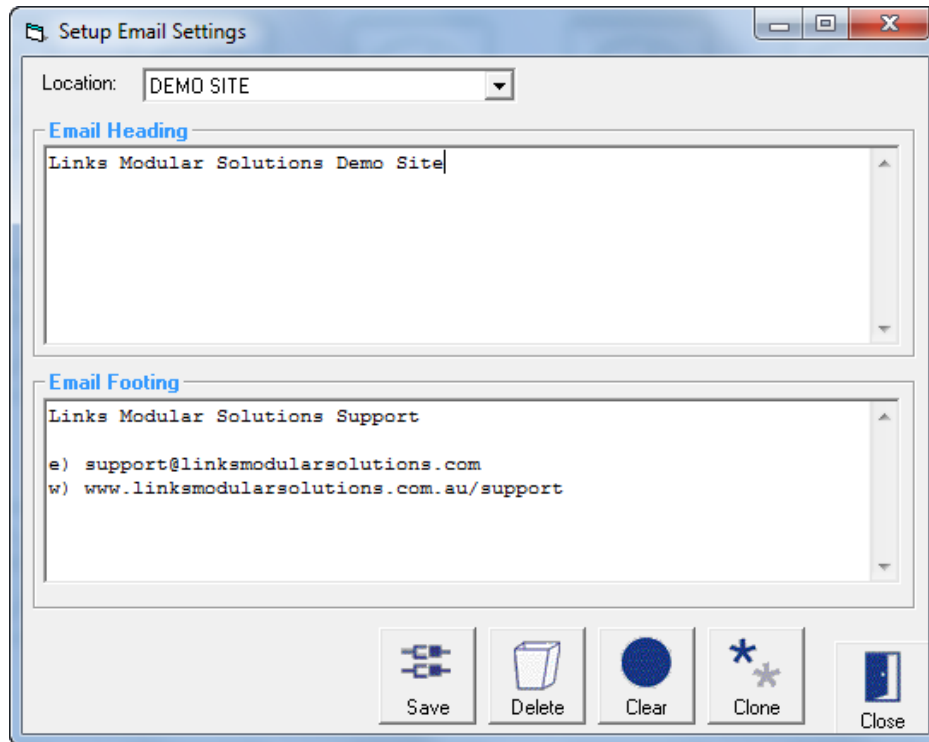
Default Payment Type

When making Student Bookings, the Payment Type can default to Credit Card, Bank Account or Cash.

## Email Settings

Admin > Classes > Email Settings

A Header and Footer can be defined for Emails sent through the Classes Module.



Location

Select the location to define Email settings

Email Heading

Enter what is to be displayed at the top of emails sent through Classes

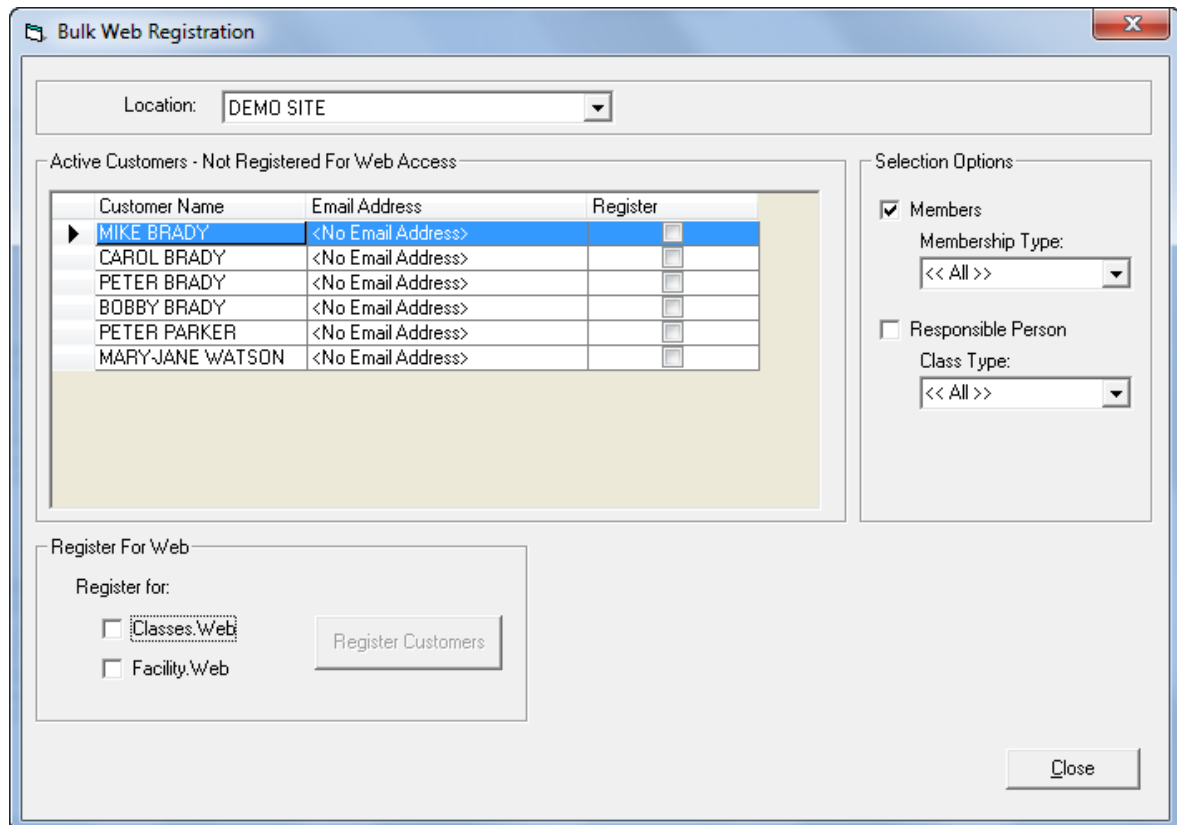
Email Footing

Enter what is to be displayed at the bottom of emails sent through Classes

## Bulk Web Registration Process

Admin > Classes > Bulk Web Registration Process

The Bulk Web Registrations screen allows all Members and Responsible Persons who are not registered for Web Access to be registered in bulk.



Location: DEMO SITE

Active Customers - Not Registered For Web Access

Customer Name	Email Address	Register
MIKE BRADY	<No Email Address>	<input type="checkbox"/>
CAROL BRADY	<No Email Address>	<input type="checkbox"/>
PETER BRADY	<No Email Address>	<input type="checkbox"/>
BOBBY BRADY	<No Email Address>	<input type="checkbox"/>
PETER PARKER	<No Email Address>	<input type="checkbox"/>
MARY-JANE WATSON	<No Email Address>	<input type="checkbox"/>

Selection Options

Members  
 Membership Type: << All >>

Responsible Person  
 Class Type: << All >>

Register For Web

Register for:

Classes.Web

Facility.Web

Register Customers

Close

Location                      Select the site location to affect

Selection Options

Members                      Tick this check box to select members to register for Web Access

Membership Type            Use the  to select the Membership Types to select members

Responsible Person         Tick this check box to select Responsible Persons to register for Web Access

Class Type                    Use the  to select the Class Types to select Responsible Persons

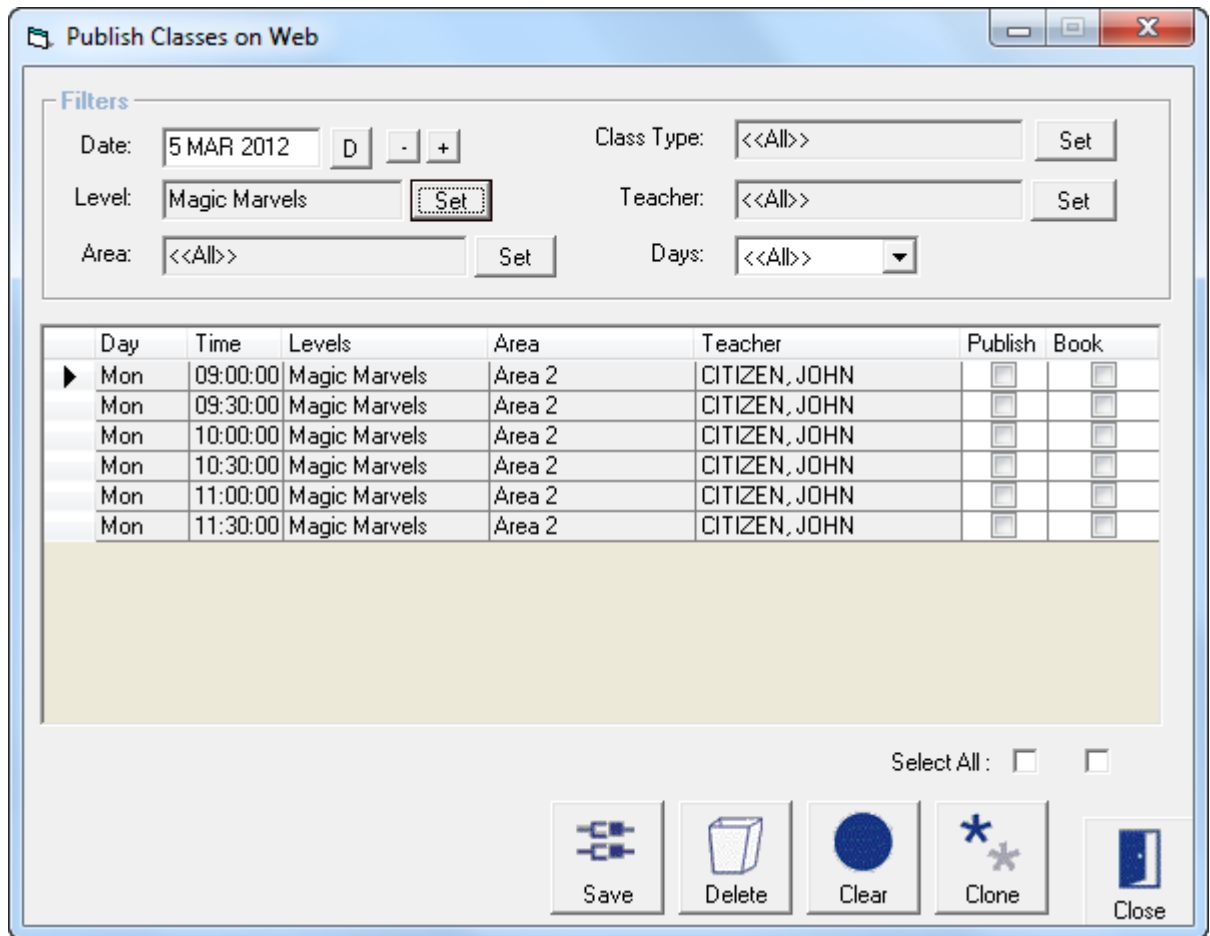
### Active Customers – Not Registered for Web Access

Listed are the active customers within the defined selection options who are not registered for Web Access. Tick the Register check box to select the customer to Register for Web

### Publish Web Classes

Admin > Classes > Publish Web Classes

The user can define which Classes are published on the web and also which can be booked through the web.



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"/>

#### Filters

Use the filters to narrow down which Classes are listed

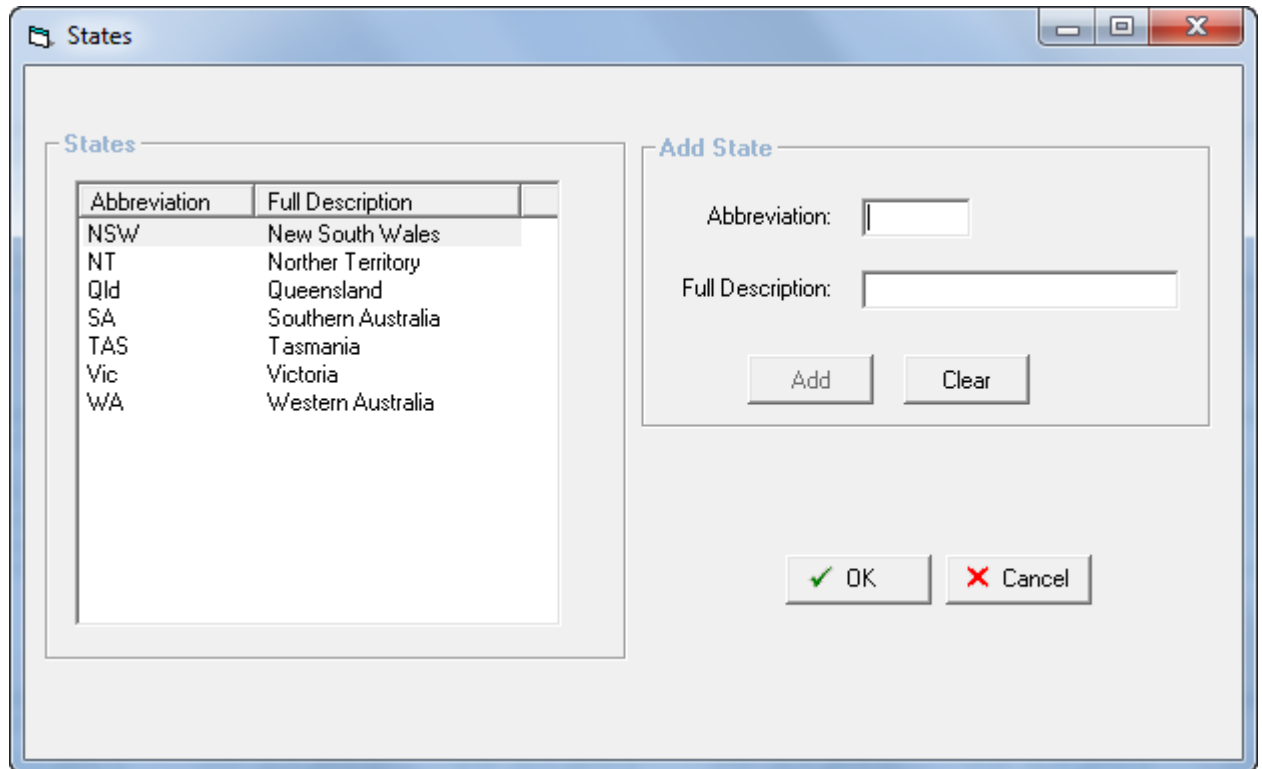
**Publish** Tick to publish this class on the web, or tick Select All

**Book** Tick to enable bookings of this class on the web, or tick Select All

## States

Admin > Classes > States

This screen is used to setup a list of States to be used when entering Customer's addresses.



Abbreviation	Full Description
NSW	New South Wales
NT	Norther Territory
Qld	Queensland
SA	Southern Australia
TAS	Tasmania
Vic	Victoria
WA	Western Australia

### States

Listed are the States currently entered in the database.

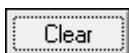
### Add State

Abbreviation                      Enter the State's abbreviation

Full Description                    Enter the full name of the State



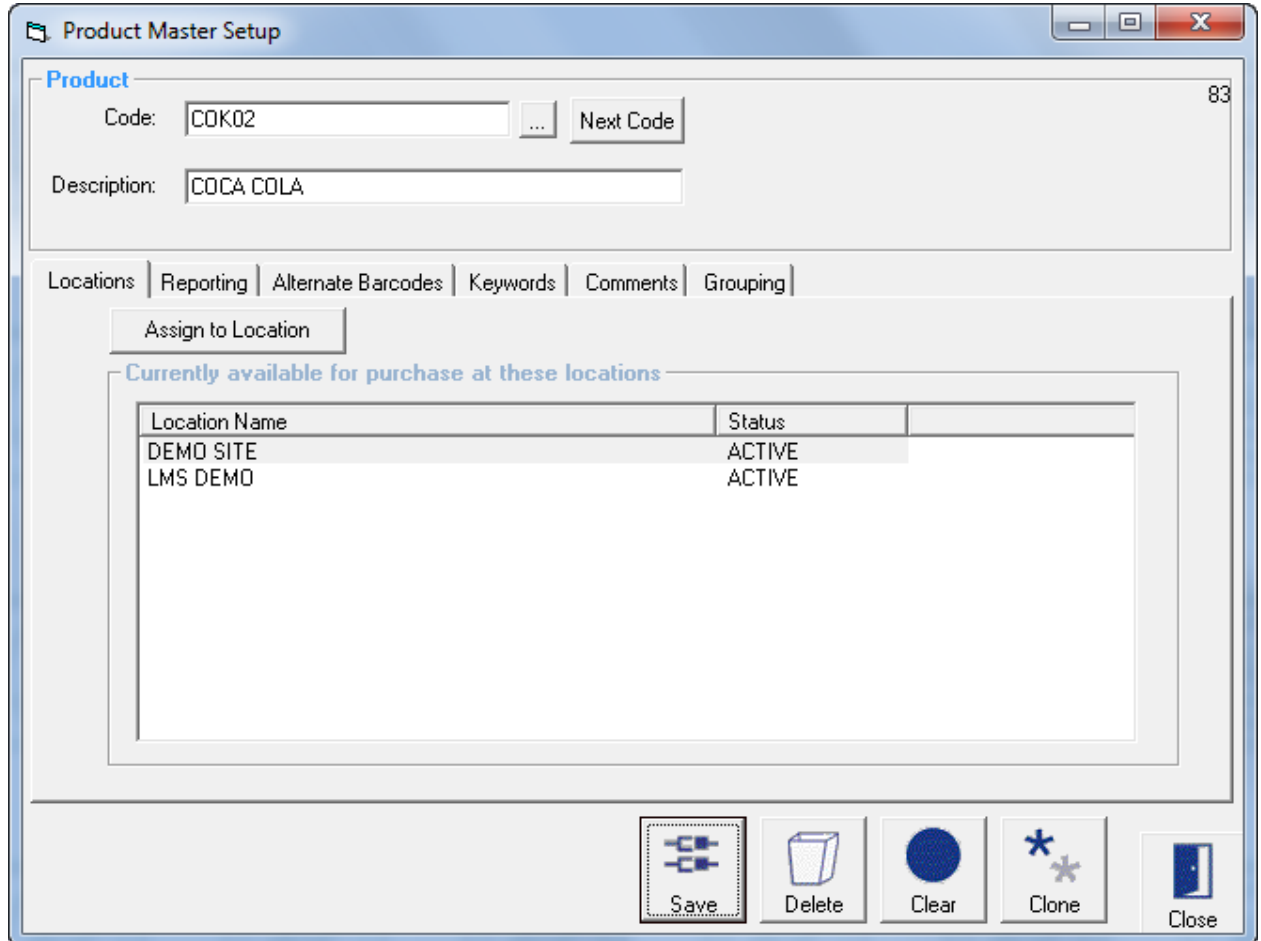
“Add” this State to the list



“Clear” the above information

**Product Master**

Admin > Products/Services > Products > Product Master

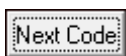


This window is used to set up or modify products. Products are defined as consumable items that are sold to customers; they are not services such as casual entry.

**Code** Type in a code without spaces or symbols eg: MARSBAR, SHOESBL, GYMBOOK etc; or numeric codes no less than 7 characters eg: 874596235 or alternatively type in or scan a barcode for the product to represent your sale item. Most barcodes are already attached to products or you can create your own through Microsoft Excel



Click to search for an existing product



You also have the option of allowing Links to generate the code for you. Clicking on this icon will display the next available code

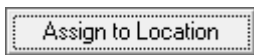


**Description** Type in a description for the product. Eg: Mars Bar, Shoes Black, Gymnastics Book or Knee High Boots. If choosing an existing product the description will automatically be displayed

*Admin > Products/Services > Products > Product Master > Locations*

Currently available for purchase at these locations

Lists the Locations where this product is currently available

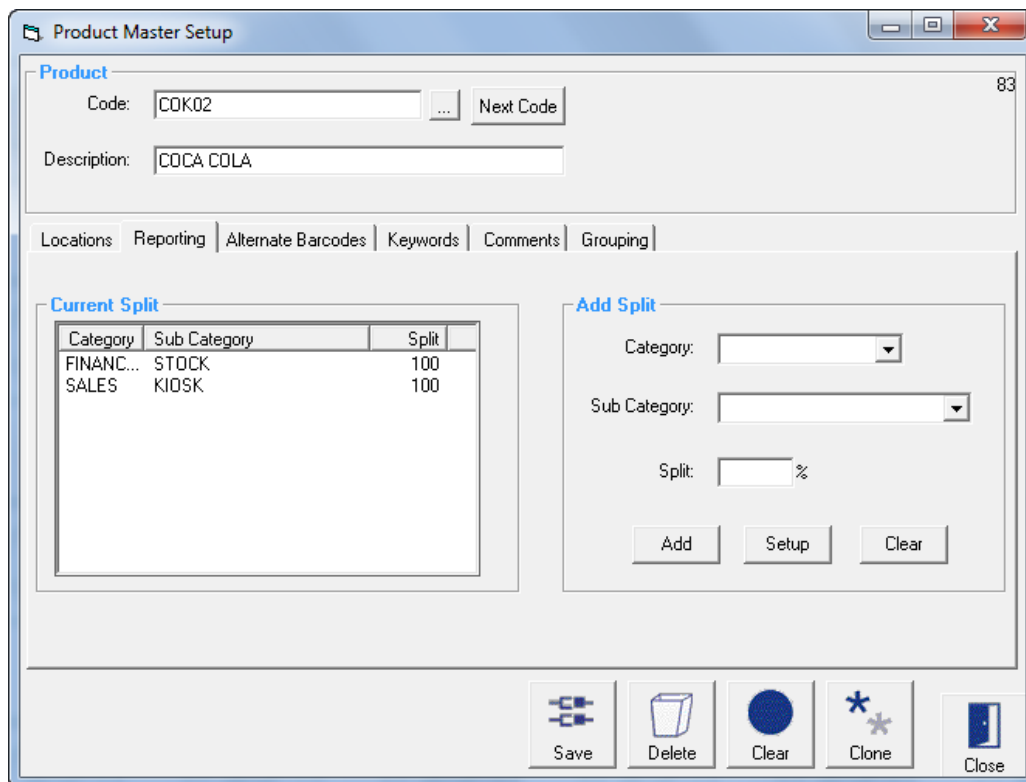


Allows the Product Setup details to be customised for each location

See *Admin > Products/Services > Products > Product Location Setup*

*Admin > Products/Services > Products > Product Master > Reporting*

This section is used to allocate the income for this product to a category. As a minimum it is recommended that you allocate at least one category to every product.



The screenshot shows the 'Product Master Setup' window with the 'Reporting' tab selected. The 'Product' section shows 'Code: COK02' and 'Description: COCA COLA'. The 'Current Split' table is as follows:

Category	Sub Category	Split
FINANC...	STOCK	100
SALES	KIOSK	100

The 'Add Split' section includes dropdowns for 'Category' and 'Sub Category', a 'Split' percentage field, and 'Add', 'Setup', and 'Clear' buttons. A toolbar at the bottom contains 'Save', 'Delete', 'Clear', 'Clone', and 'Close' icons.

**Current Split**


**Category** This window lists the categories that have been assigned to this product and the % split for each category

Deleting a Category      Highlight the category and a cross will appear, click on the cross to delete

### Add Split

From this window you have the option of creating a new category or choosing a category already created. New categories can also be created in Admin > Products/Services > Sales Category

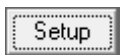
Category      Click on the  to search for the 'mother' category

Sub Category      Click on the  to search for the sub category

Split      You have the option of choosing more than one 'mother' and sub category provided the total split adds up to 100%. Links will automatically default the first category selected to 100% however you can change this value



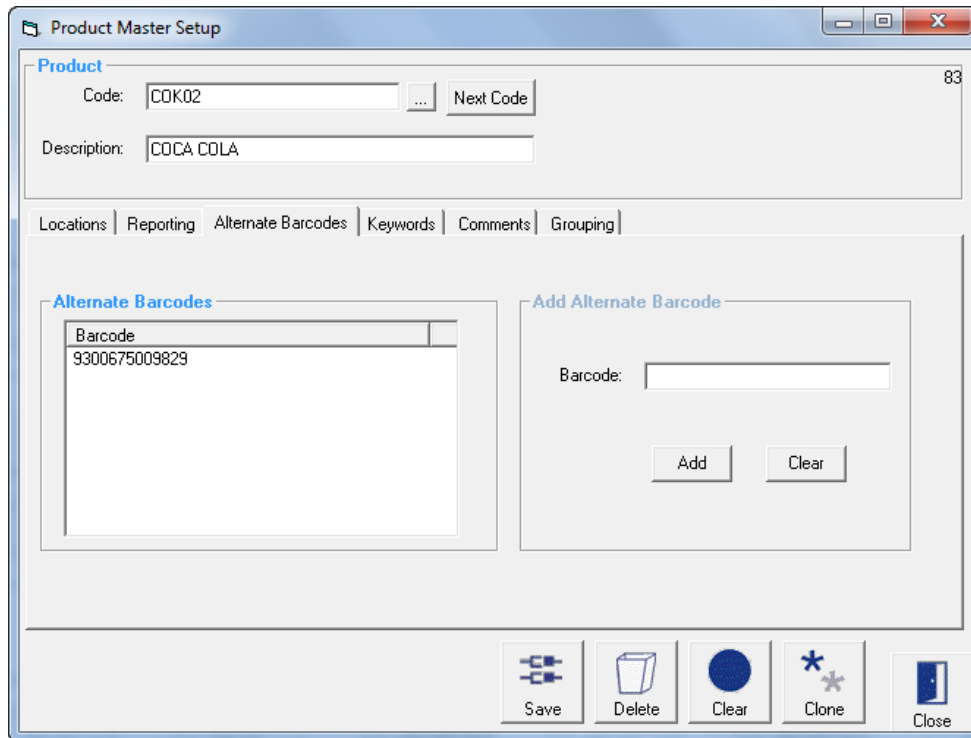
To add this category click on the 'Add' icon or clear the entry by clicking the 'Clear' button. When adding new sub categories these will appear in the category box to the left



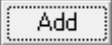

Click on this icon to set up a new sales category and the following window will appear – see Admin > Products/Services > Sales Category

Admin > Products/Services > Products > Product Master > Alternate Barcodes

This window is used to attach alternate barcodes or codes to this main product code. When the alternate code is recorded and used to process sales through **POS**, the stock on hand will decrease as it is linked to the main product code.

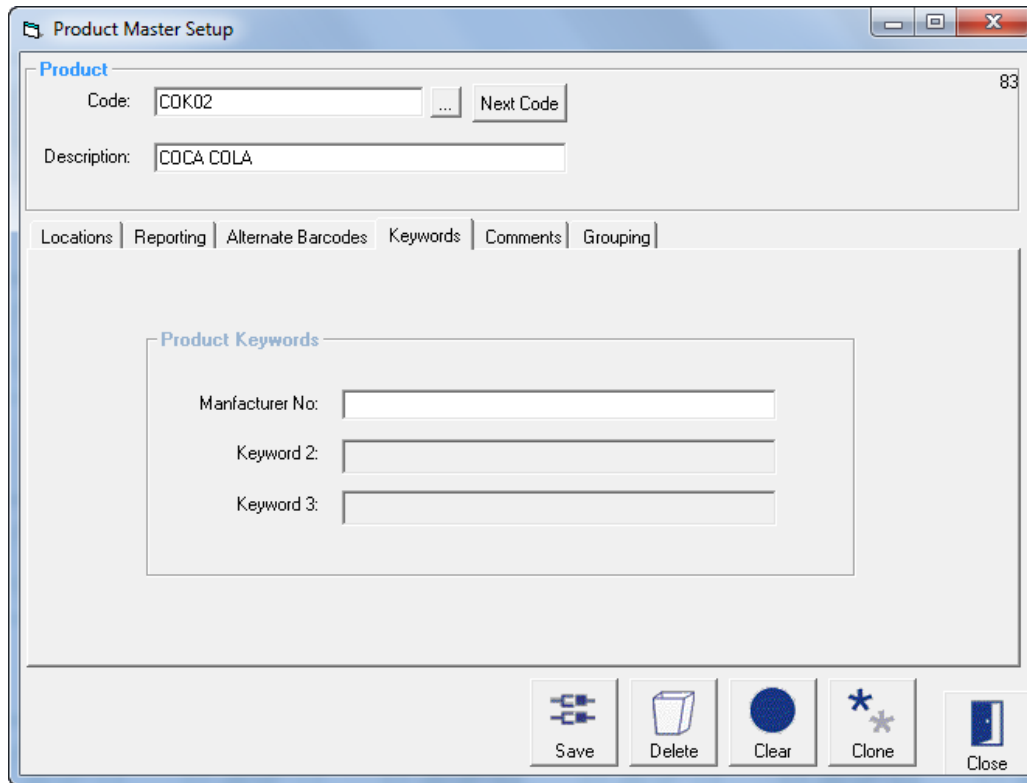


Add Alternate  
Barcode

Type in an alternate barcode or code and click the  icon to add the list of alternate barcodes or click the  icon to delete the new alternate code entry

Admin > Products/Services > Products > Product Master > Keywords

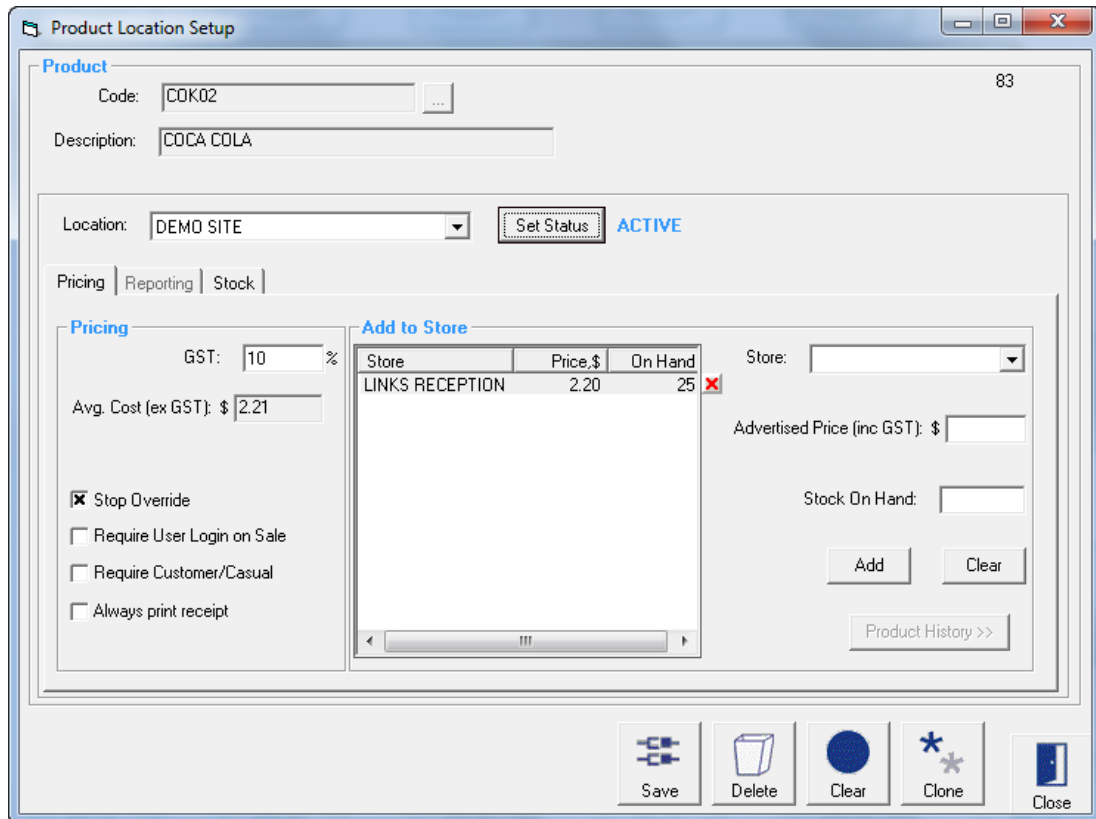
This window is used to help you search for this product when in POS Screen. This tab will only be displayed if you have created Keywords in the Setup Point Of Sale screen and can be found Admin > POS > Setup > Products > Product Keywords



The screenshot shows the 'Product Master Setup' window with the 'Keywords' tab selected. The 'Product' section contains a 'Code' field with 'COK02' and a 'Description' field with 'COCA COLA'. Below this is a tabbed interface with 'Keywords' selected. The 'Product Keywords' section contains three input fields: 'Manufacturer No:', 'Keyword 2:', and 'Keyword 3:'. The 'Manufacturer No:' field is highlighted. At the bottom, there is a toolbar with five buttons: 'Save', 'Delete', 'Clear', 'Clone', and 'Close'.

Manufacturer No is the keyword in the above example. Enter the Manufacturer No.

Admin > Products/Services > Products > Product Location



**Product** Code: COK02 83  
Description: COCA COLA

Location: DEMO SITE **Set Status** ACTIVE

Pricing | Reporting | Stock

**Pricing** GST: 10 %  
Avg. Cost (ex GST): \$ 2.21

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

**Add to Store**

Store	Price,\$	On Hand
LINKS RECEPTION	2.20	25

Store:   
Adversised Price (inc GST): \$   
Stock On Hand:   
Add Clear  
Product History >>

Save Delete Clear Clone Close

Location

Select which Location to setup the product for purchase



Press this button to change the status of the product. This allows the status to change from Active to Inactive and vice versa. A product that is Inactive will no longer be able to be sold

Admin > Products/Services > Products > Product Location > Pricing

GST	The default GST will be inserted into this field when creating a new product. This is the amount of GST to be subtracted from the advertised price. This amount can be changed if required.
Avg Cost (ex GST)	Type in the average cost of the product. This figure will be used in reports that calculate profit
Stop Override	Check this box if the advertised price of this product cannot be adjusted at point of sale
Require User Login on Sale	You may choose to record the cashiers name against all sales made to this product. If you haven't nominated this feature as a Setup requirement in POS Setup, then this option allows you to activate it on individual products. Click in the box to activate this function
Require Customer/Casual	Select this option to make it mandatory to allocate POS transactions to a Customer or enter a Casual users name
Always print receipt	Check this box if you wish a receipt to be printed on every sale of this product

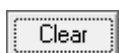
#### Add to Store

Listed are the Stores at this location that sell this product as well as the Price and amount of stock on hand.

Store	Use the <input type="button" value="▼"/> to select the store where the product is to be sold
Advertised Price (inc GST)	Type in the price you would like this product to be sold for, including \$ and ¢
Stock on Hand	This figure represents the stock on hand for this product. This field can manually be modified, however when new stock is received and recorded in the Stock Module, the stock on hand will automatically increase



Add the above details to this location

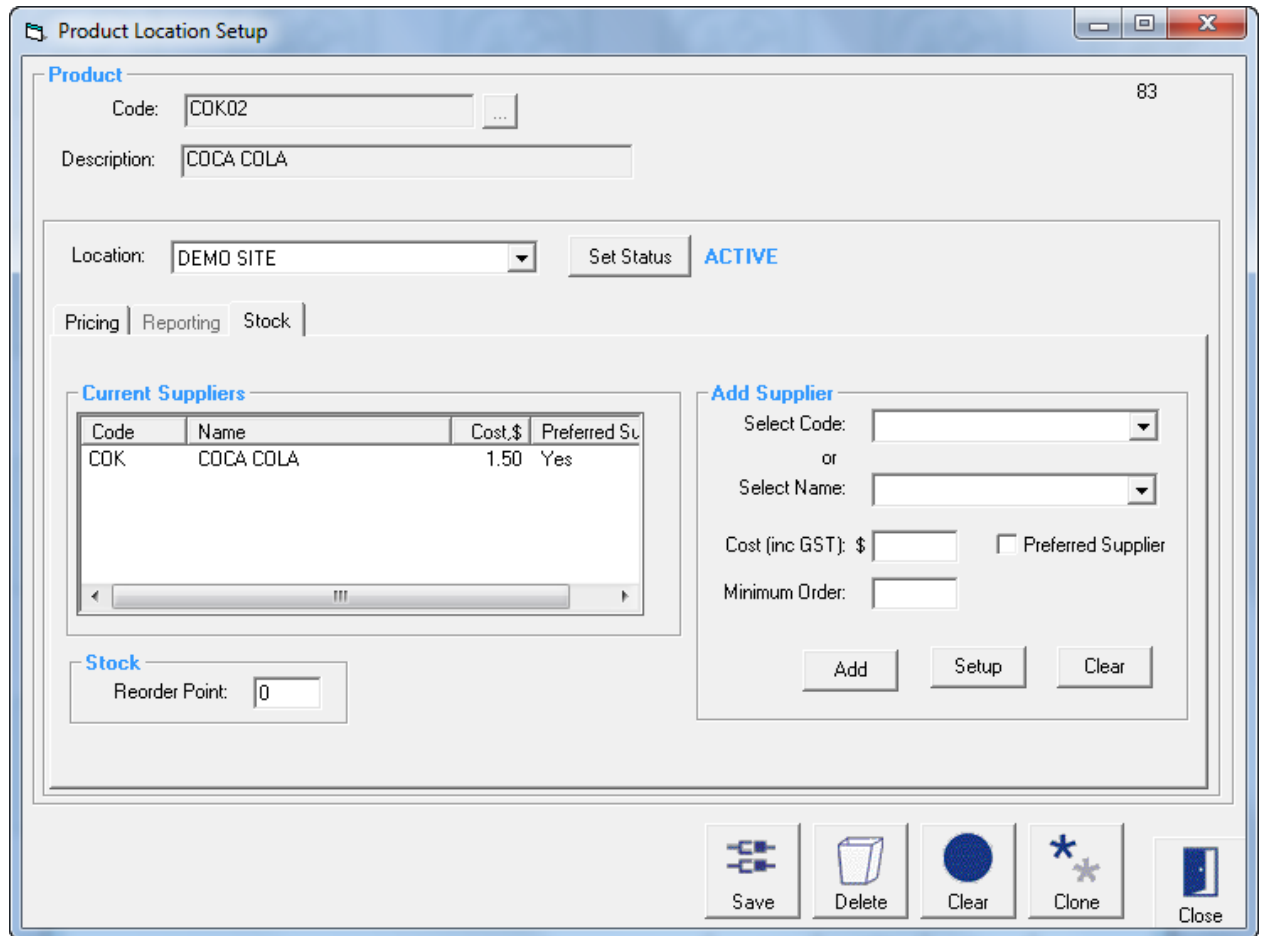


Clear the above details

**Product History >>**

Highlight a Store entry listed and click the Product History button to see a log of changes to the Stock on Hand figure for this Product at this Store. Log includes Orders Received, Stock take, Stock Transfer and Stock Adjustments. Sales of the Product are not included in this screen

Admin > Products/Services > Products > Product Location > Stock



The screenshot shows the 'Product Location Setup' window. The 'Product' section includes a 'Code' field with 'COK02' and a 'Description' field with 'COCA COLA'. The 'Location' is set to 'DEMO SITE' and the status is 'ACTIVE'. There are tabs for 'Pricing', 'Reporting', and 'Stock'. The 'Current Suppliers' table lists one supplier: 'COK' with name 'COCA COLA', cost '\$ 1.50', and 'Preferred Supplier' status 'Yes'. The 'Add Supplier' section has fields for 'Select Code', 'Select Name', 'Cost (inc GST): \$', and 'Minimum Order', along with a 'Preferred Supplier' checkbox and 'Add', 'Setup', and 'Clear' buttons. The 'Stock' section has a 'Reorder Point' field set to '0'. At the bottom are icons for 'Save', 'Delete', 'Clear', 'Clone', and 'Close'.

Code	Name	Cost.\$	Preferred Su.
COK	COCA COLA	1.50	Yes

### Current Suppliers

Listed are the Name and Code of the suppliers of this product including the cost per unit.

This is a list of suppliers of this product including the cost of the unit price of the product inclusive of GST. Suppliers can also be created in the Supplier Set up screen – Admin > Products/Services > Stock > Suppliers

### Stock

#### Reorder Point

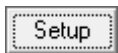
Type in the figure that represents the level of stock remaining for notification to reorder

## Add Supplier

- Select Code** Click on the  to select the existing supplier for this product
- Select Name** This name will automatically default once you have selected the supplier code
- Cost (inc GST)** Type in the cost value of the stock item (One unit only) inclusive of GST
- Minimum Order** This field is used to remind the user the minimum order to be placed for this product
- Preferred Supplier** Check this box if this is the preferred supplier for this product. This supplier will be used for reports or stock screens where products are selected by supplier



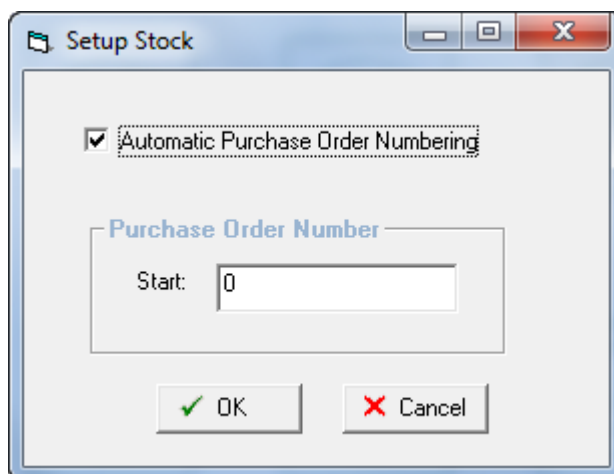
To add this supplier click on the 'Add' icon or clear the entry by clicking the 'Clear' icon. When adding new suppliers these will appear in the current supplier list to the left



To set up a new supplier, click on this icon – further detail on Supplier Setup is found Admin > Products/Services > Stock > Suppliers

## Stock Setup

Admin > Products/Services > Stock > Setup



- Automatic Purchase Order Numbering** Will generate sequential numbers automatically if you don't have a current purchase order system



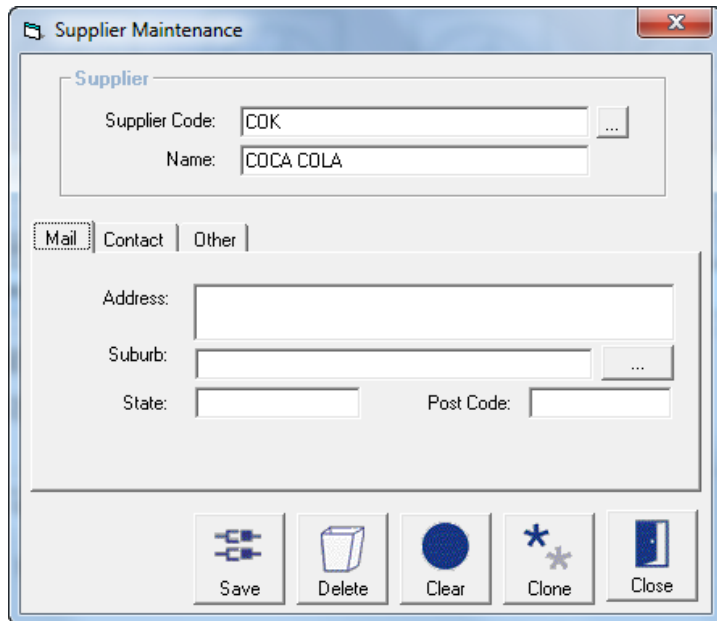
Purchase Order  
Number

Choose a number to start your purchase orders at


## Suppliers

Admin > Products/Services > Stock > Suppliers

Set up the suppliers to be used as part of criteria to be entered when establishing Products.



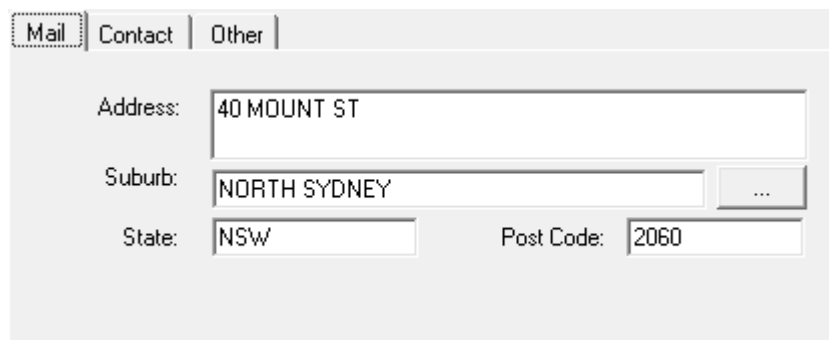
Supplier Code

Type in supplier code if a new entry. If an existing entry, click on the  key to search for an existing supplier

Name

Type in the name of the supplier. If an existing supplier, the name description will automatically appear

Enter all relevant information



Mail **Contact** Other

Name:

Position:

Phone:

Fax:

Email:

Mail Contact **Other**

ABN:

Web Site:

Comments:

## Services Master

Admin > Products/Services > Services > Services Master

Set up or modify Services. Services are defined as any item that is offered to a customer that has not been purchased for resale and is sold on a casual basis.

Service Master Setup

**Service**

Code:

Description:

Locations | Reporting | Keywords

Currently available for purchase at these locations

Location Name	Status	Retail Price,\$
DEMO SITE	ACTIVE	5.00

Save Delete Clear Clone Close

Code                      Type in a code without spaces or symbols eg: CG. When creating new codes a mix of numbers and letters is preferable



Click this icon if you want to search for an existing service



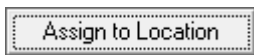
You also have the option of allowing Links to generate the code for you. Clicking on this icon will display the next available code

Description              Type in a description for the service, eg: Casual Gym. If choosing an existing service the description will automatically be displayed

*Admin > Products/Services > Services > Services Master > Locations*

Currently available for purchase at these locations

Lists the Locations where this service is currently offered for sale

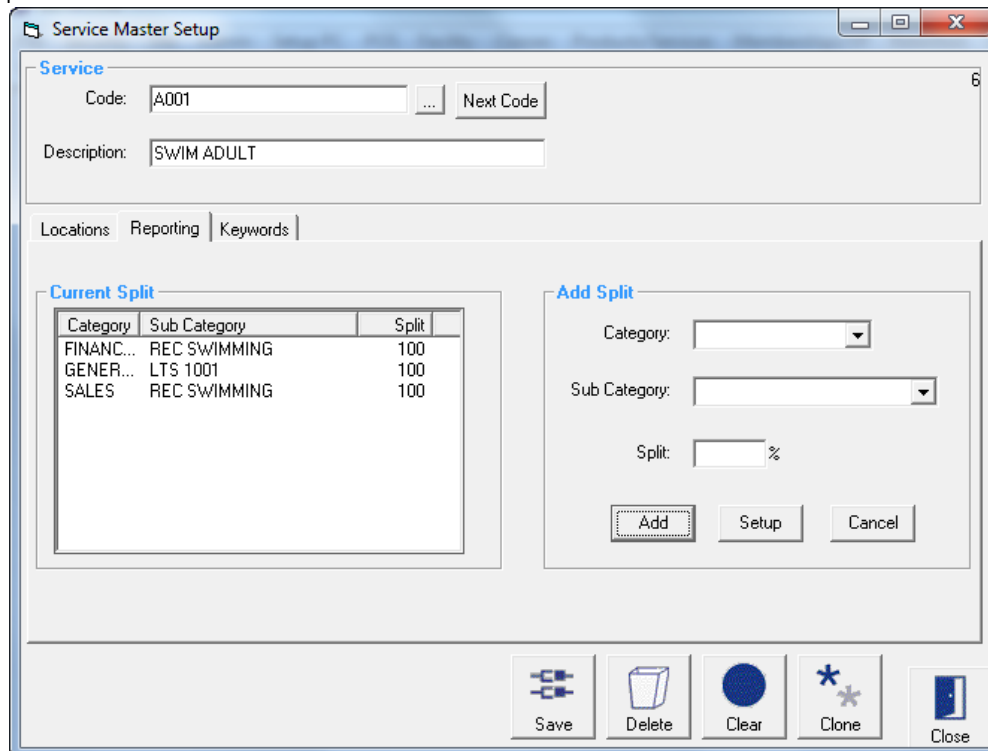


Allows the Service Setup details to be customised for each location

See *Admin > Products/Services > Services > Service Location Setup*

*Admin > Products/Services > Services > Services Master > Reporting*

The Service Master Setup Reporting section is used to allocate the income for this service to a category. As a minimum it is recommended that you allocate at least one category to every product.



The screenshot shows the 'Service Master Setup' window with the 'Reporting' tab selected. The 'Service' section shows 'Code: A001' and 'Description: SWIM ADULT'. Below this are tabs for 'Locations', 'Reporting', and 'Keywords'. The 'Reporting' section is divided into two parts: 'Current Split' and 'Add Split'.

**Current Split**

Category	Sub Category	Split
FINANC...	REC SWIMMING	100
GENER...	LTS 1001	100
SALES	REC SWIMMING	100

**Add Split**

Category:

Sub Category:

Split:  %

Buttons: Add, Setup, Cancel

Bottom toolbar: Save, Delete, Clear, Clone, Close

## Current Split

**Category** This window lists the categories that have been assigned to this service and the % split for each category

**Deleting a Category** Highlight the category and a cross will appear, click on the cross to delete

## Add Split

From this window you have the option of creating a new category or choosing a category already created. New categories can also be created – Admin > Products/Services > Sales Category

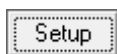
**Category** Click on the  to search for the 'mother' category

**Sub Category** Click on the  to search for the sub category

**Split** You have the option of choosing more than one 'mother' and sub category provided the total split adds up to 100%. Links will automatically default the first category selected to 100% however you can change this value



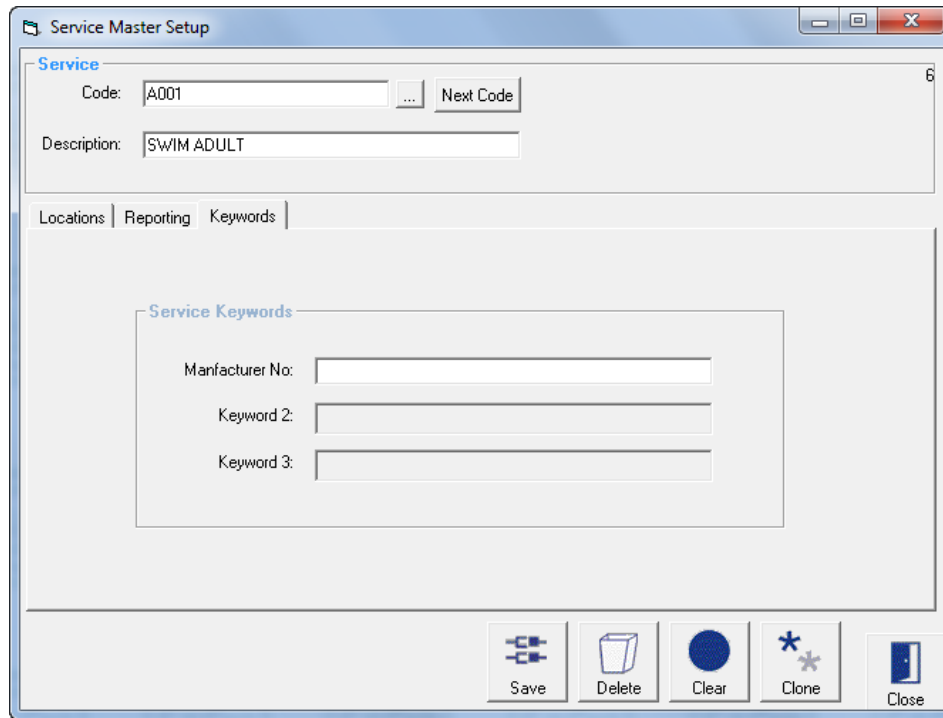
To add this category click on the 'Add' icon or clear the entry by clicking the 'Clear' button. When adding new sub categories these will appear in the category box to the left



Click on this icon to set up a new sales category and the following window will appear – see Admin > Products/Services > Sales Category

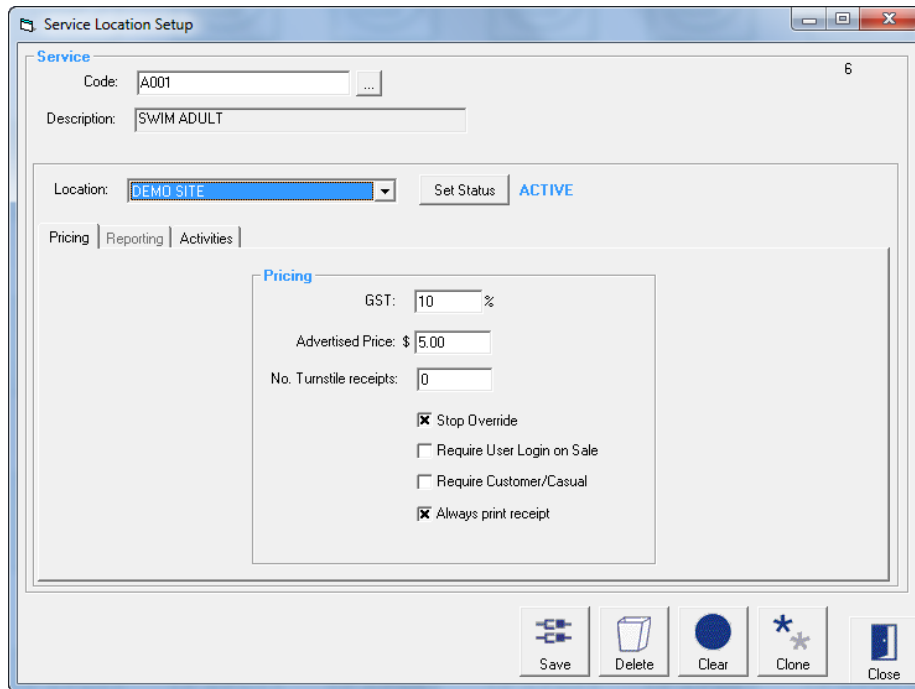
Admin > Products/Services > Services > Services Master > Keywords

This window is used to help you search for this Service when in POS Screen. This tab will only be displayed if you have created Keywords in the Setup Point of Sale screen - Admin > POS > Setup > Products > Product Keywords



Manufacturer No is the keyword in the above example. Enter the Manufacturer No.

Admin > Products/Services > Services > Services Location



Admin > Products/Services > Services > Services Location > Pricing

Location

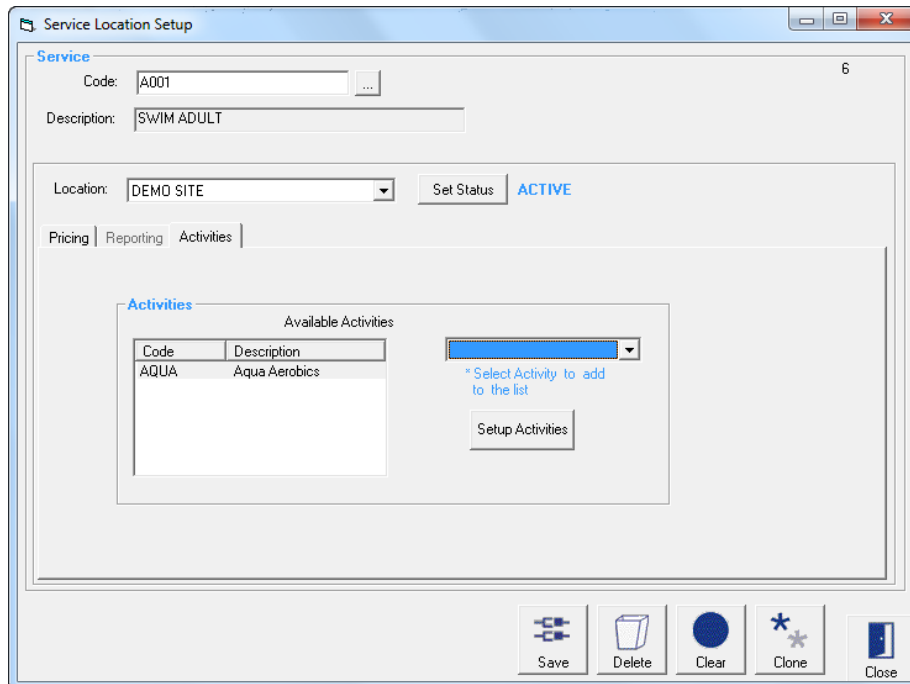
Select which Location to setup the Service for purchase



Press this button to change the status of the Service. This allows the status to change from Active to Inactive and vice versa. A Service that is Inactive will no longer be able to be sold

## Pricing

GST	The default GST will be inserted into this field when creating a new Service. This is the amount of GST to be subtracted from the advertised price. This amount can be changed if required.
Advertised Price (inc GST)	Type in the price that this Service will be sold for, including \$ and ¢
No. Turnstile receipts	A small barcode receipt can be printed which will allow entry to turnstiles. More than one can be printed out if required, e.g. for a family entry
Stop Override	Check this box if the advertised price of this Service cannot be adjusted at POS
Require User Login on Sale	You may choose to record the cashiers name against all sales made to this Service. If you haven't nominated this feature as a Setup requirement in POS Setup, then this option allows you to activate it on individual Services. Click in the box to activate this function
Require Customer/Casual	Select this option to make it mandatory to allocate POS transaction to a Customer or enter a Casual users name
Always print receipt	Check this box if you wish a receipt to be printed on every sale of this Service



These activities are used as part of the Members Survey process that is integrated with the POS Module. When activated, upon recording a visit at the POS for all Students or customers with Memberships and Visit Passes, a dialog box will be displayed listing the activities allocated to the Class Type, Membership or Visit Pass. It is then possible to select the activities and save the information. An activities report can then be produced that displays what activities students, members and visit pass holders are utilising.

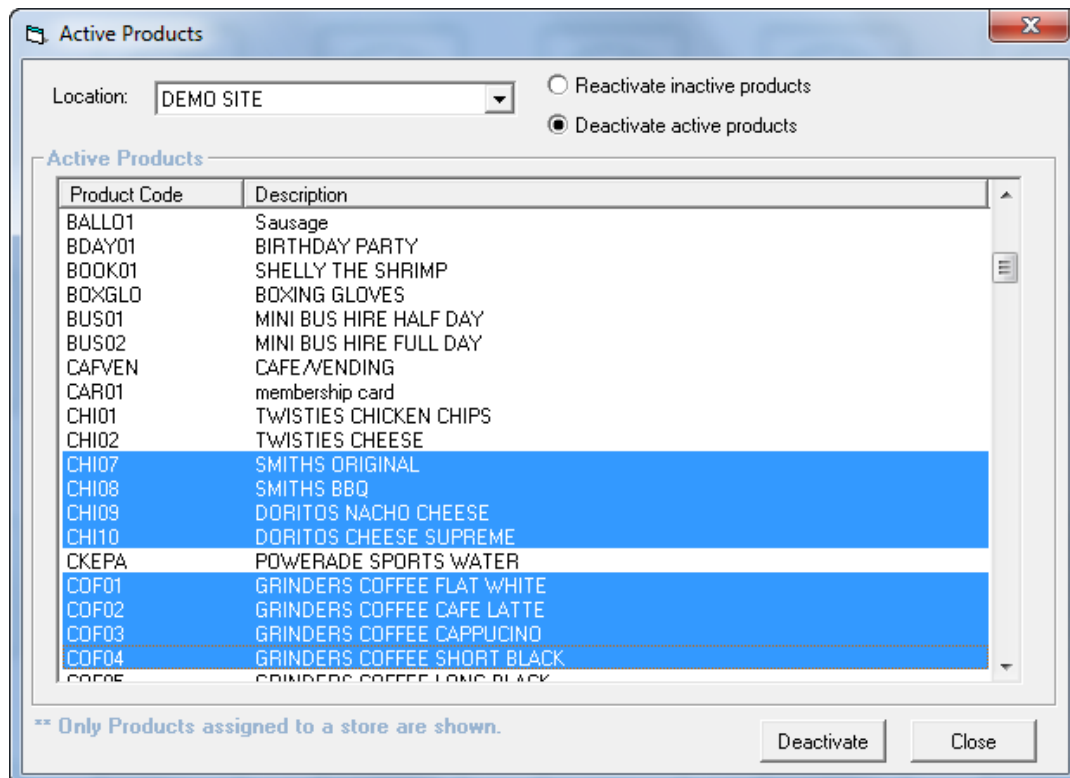



## Inactivate/Reactivate

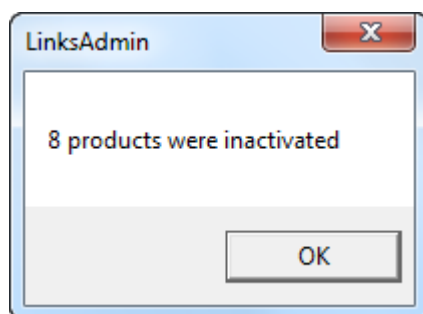
Admin > Products/Services > Inactivate/Reactivate

When services, products, multi visit passes and membership types are created they automatically have the status of Active. Once these items have been created they can no longer be deleted off the Links database but instead can be made inactive.

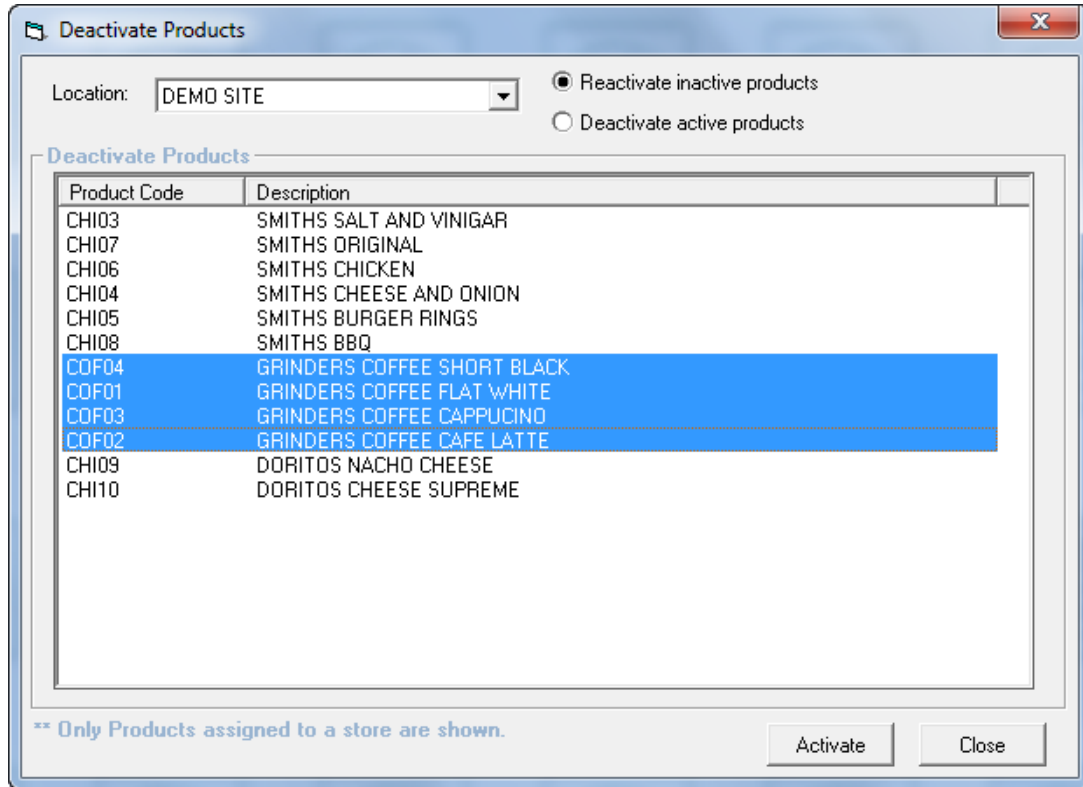
This screen allows for the bulk processing of Services and Products to be activated or deactivated.




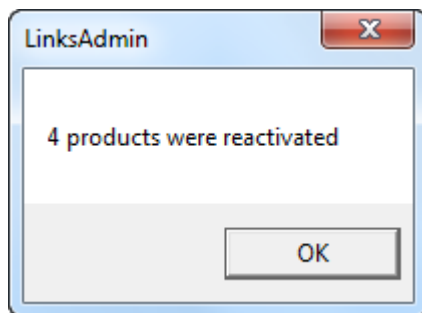
To deactivate active services and products click on the 'Deactivate Active Products'. To select entries to be deactivated highlight one entry then holding down the 'Ctrl' key continue to highlight the remaining entries. Click on the  icon and the following message will be displayed.



To reactivate services and products click on the 'Reactivate Inactive Products'



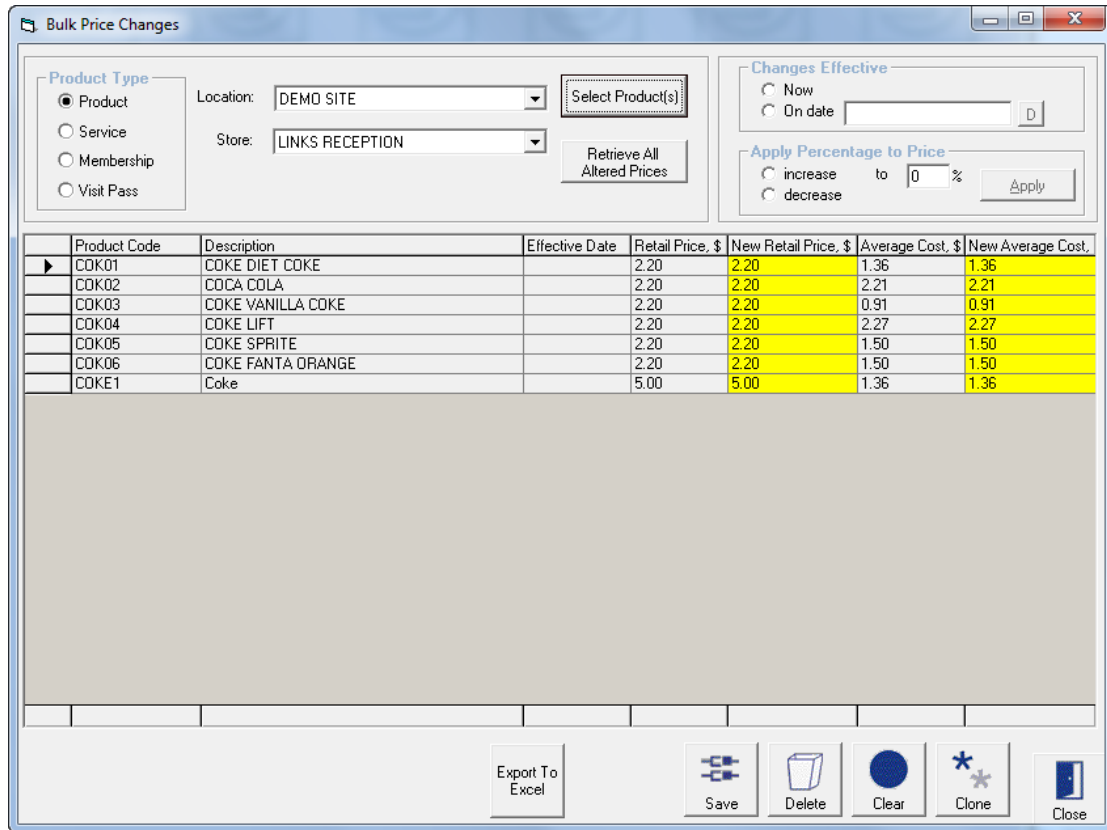
To select entries to be reactivated highlight one entry then holding down the 'Ctrl' key continue to highlight the remaining entries. Click on the  icon and the following message will be displayed.



## Bulk Price Update

Admin > Products/Services > Bulk Price Update

This screen has been developed to allow for the bulk update of prices for all or selected Products, Services, Memberships and Visit Passes. In addition it is possible to affect the price change instantaneously or on a specified date.



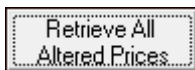
Product Code	Description	Effective Date	Retail Price, \$	New Retail Price, \$	Average Cost, \$	New Average Cost, \$
COK01	COKE DIET COKE		2.20	2.20	1.36	1.36
COK02	COCA COLA		2.20	2.20	2.21	2.21
COK03	COKE VANILLA COKE		2.20	2.20	0.91	0.91
COK04	COKE LIFT		2.20	2.20	2.27	2.27
COK05	COKE SPRITE		2.20	2.20	1.50	1.50
COK06	COKE FANTA ORANGE		2.20	2.20	1.50	1.50
COKE1	Coke		5.00	5.00	1.36	1.36

Product Type

Select from Products, Services, Memberships and Visit Passes



Click this icon to search and select from a list of items based on the Product Type nominated above



Select a Product Type and click this icon to retrieve and display the list of items that have had their prices changed but have not been updated

Changes Effective

Now

Select this option if you wish to instantly apply the price changes after the save button is pressed


On Date

Select this option if you wish to apply the price changes on a user defined date in the future. Once the record is saved, the first person to log into Links on

the prescribed date will affect the price changes. A message will be displayed once the process is completed

Apply Percentage to Price

Use this option to Increase or Decrease prices by a nominated percentage

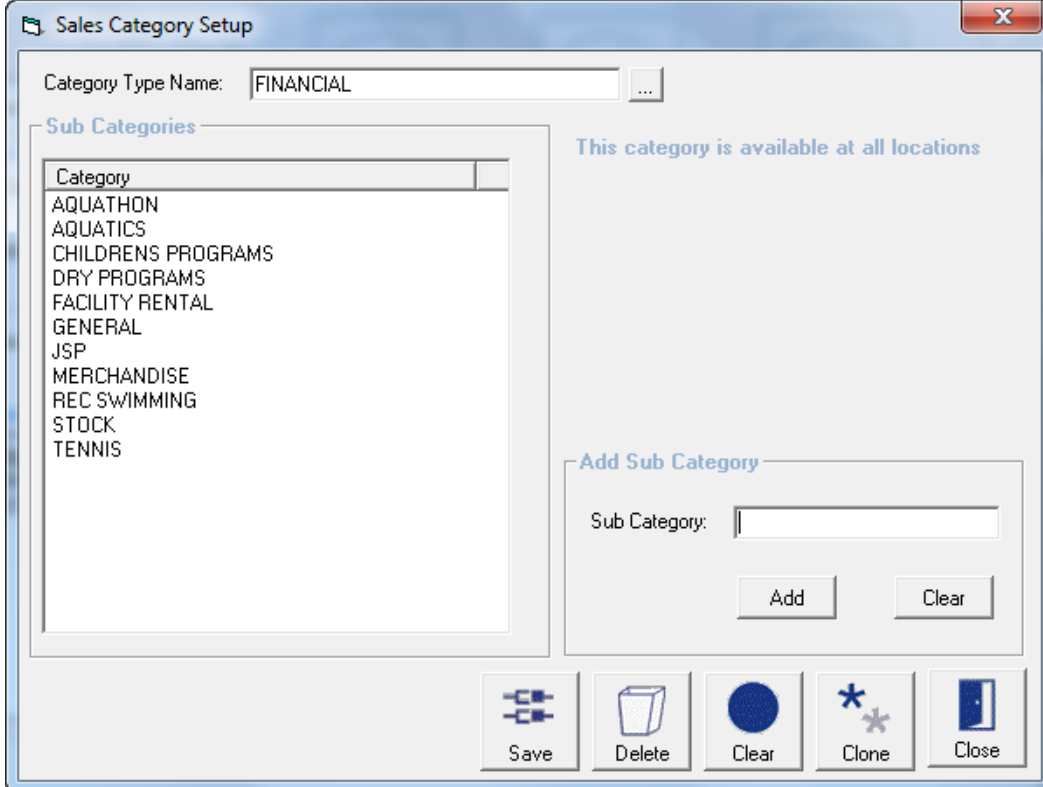
Press the  button to affect the increase or decrease of prices to all the items that are listed

Manual Price Change


Manually enter the new retail price (inclusive of GST) in the New Retail Price column for the corresponding Products, Services, Memberships and Visit Passes

## Sales Category

Admin > Products/Services > Sales Category



Category Type Name

Type in the name of the new 'mother' category. Alternatively search for an existing category if you want to add new sub categories by clicking the  icon



Add Sub Category

Type in the sub category you wish to allocate to the 'mother' category



To add this category click on the 'Add' icon or clear the entry by clicking the 'Clear' button. When adding new sub categories these will appear in the category box to the left

### **Product Units**

Admin > Products/Services > Product Units

The Product Units function is no longer utilised by Links.

### **Setup Units**

Admin > Products/Services > Setup Units

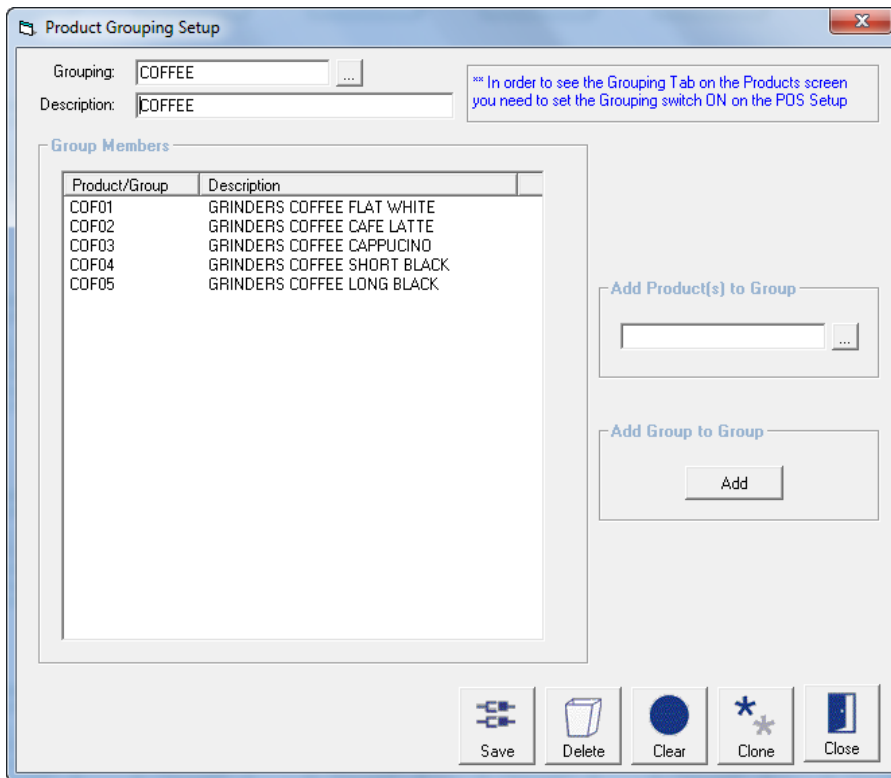
The Setup Units function is no longer utilised by Links.

## Groupings

Admin > Products/Services > Groupings


The Product Grouping Setup is used to set up and maintain groups, which link together Products, Services, Visit Passes and Membership types (and a combination of these). The Groups are created for use in the Touch Screen setup process. This group can be allocated to a button which when selected in POS will display a list of all the items in the group thereby increasing the number of buttons that can be programmed.

The items that make up the group must first be created.



### Grouping


Type in the group name without inserting spaces or symbols.

If the group already exists and you want to add further items, click the  button to search

### Description


Type in the full description of the new group. If selecting an existing group the description will automatically be shown

### Add Product(s) To Group


Click the  button to search for items to be added to this group. You can choose more than one item at a time to be included within this group



#### Add Group to Group

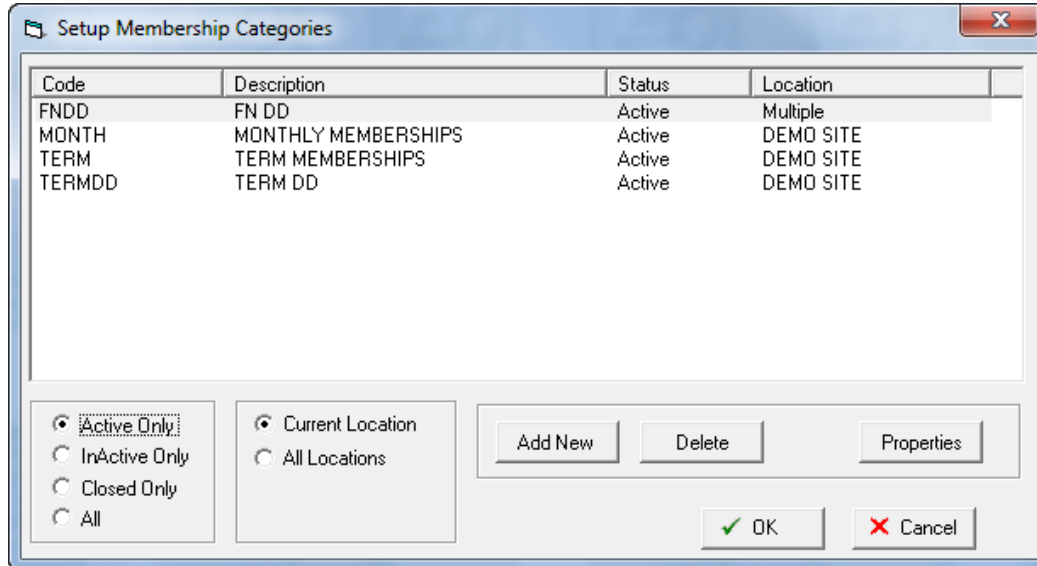
You will be required to create the group first including the items to be inserted into the group. Then, click the  icon and select from the list. The selected group will appear with the list of items

#### Deleting Item From Group

To delete an item from the group, highlight the item and click on the  that appears

**Membership Categories**

Admin > Memberships/VP > Membership > Categories

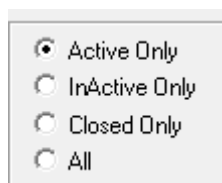


This window is used to allocate categories to memberships.

Placing a membership into a category provides the following abilities;

- Defines the payment rules.
- Defines the direct debit frequency.
- Establishes the direct debit start date and collection days.
- Allows for simplification when running process or reports which allow for the selection by category.

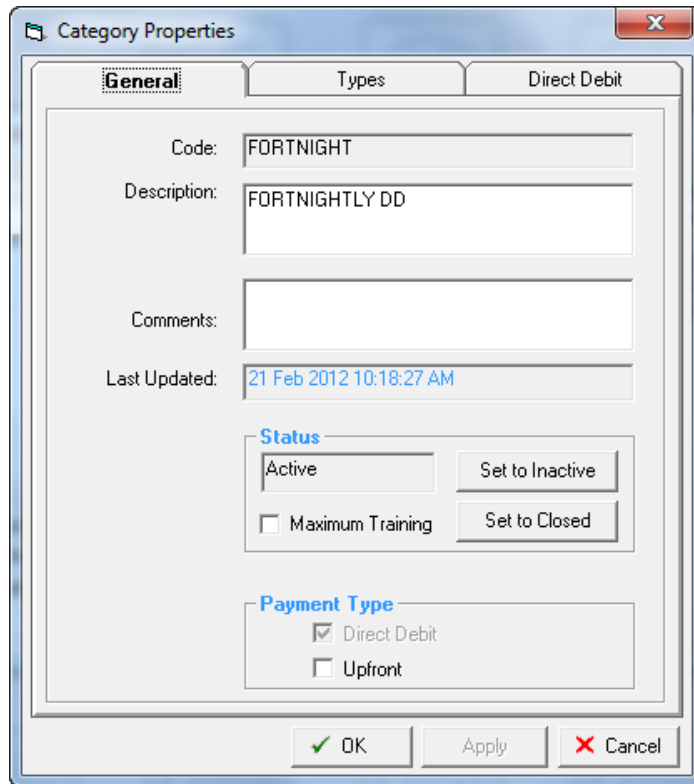
The main screen displays all the membership categories and their status, with the default view being active only. Alternatively the view can be changed by selecting a view from





Admin > Memberships/VP > Membership > Categories > Add New Category

Press the  button on the main screen



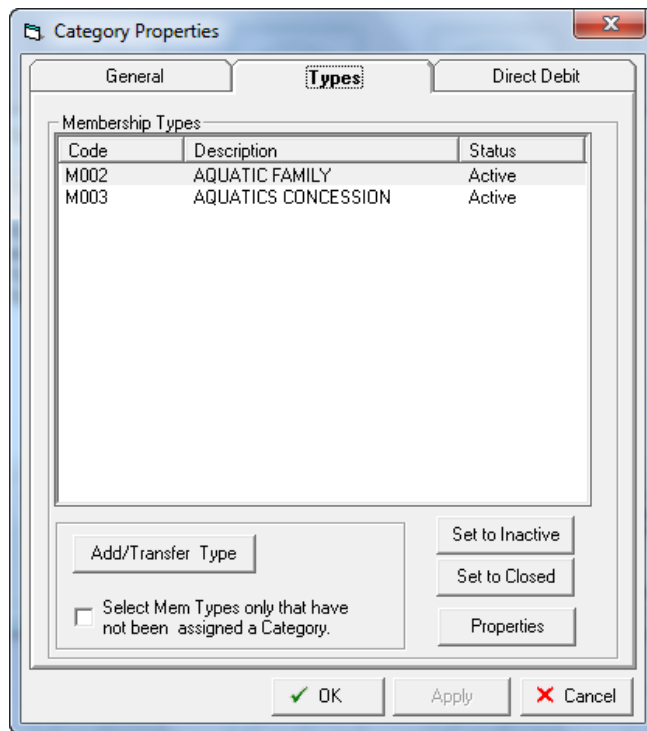
### General

Code	Type in a code to represent the category; do not use spaces or symbols
Description	Type in a full description
Comments	This is an open field that can be used to store further information relating to this category. The comments entered are not connected to other functions
Last Updated	If modifying an existing category the date will display, indicating the last time this category was edited
Status	The default setting is Active once this record is saved. There is also the ability to change the status at a later date if required
Payment Type	Select the payment type that will be applied to memberships within this category

Direct Debit	The membership will be charged a fee, established in the Membership Setup screen, for a period defined in the Direct Debit tab of this screen
Upfront	The membership will be charged a set fee established in the Membership Setup screen
Selecting both Direct Debit and Upfront	The membership can be paid in total or alternatively the balance can be collected using the direct debit process

### Types

Listed are the Membership Types within the Membership Category



Select this button and a list of memberships will be displayed. Select the membership to add to this category

Select Mem Types only that have not been Assigned a Category

Check this box to only display those membership types that have not been assigned a category when the Add/Transfer button is pressed



Highlight a membership type and press this button if you wish to change the status of the membership to inactive

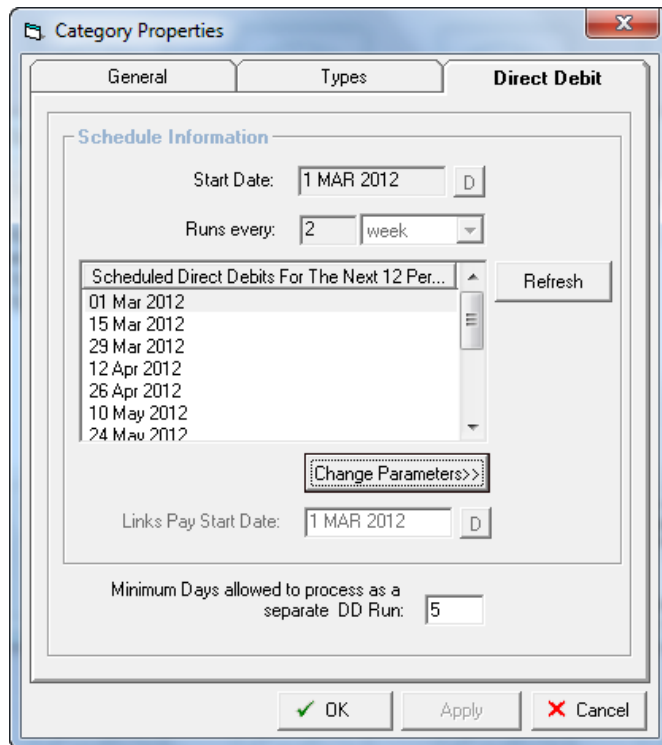


Highlight a membership type and press this button if you wish to change the status of the membership to Closed. This will only be possible if there are no current or future membership contracts



Highlight a membership type and press this button if you wish to view the membership properties, via the membership setup screen

## Direct Debit



Start Date

Select the start date of the debit process

Runs Every

This establishes the direct debit schedule. Type in the frequency number and then select the frequency type. There are 3 types

Daily      Each day

Weekly      Every 7 days, This means it will run exactly 7 days after the previous debit run has occurred

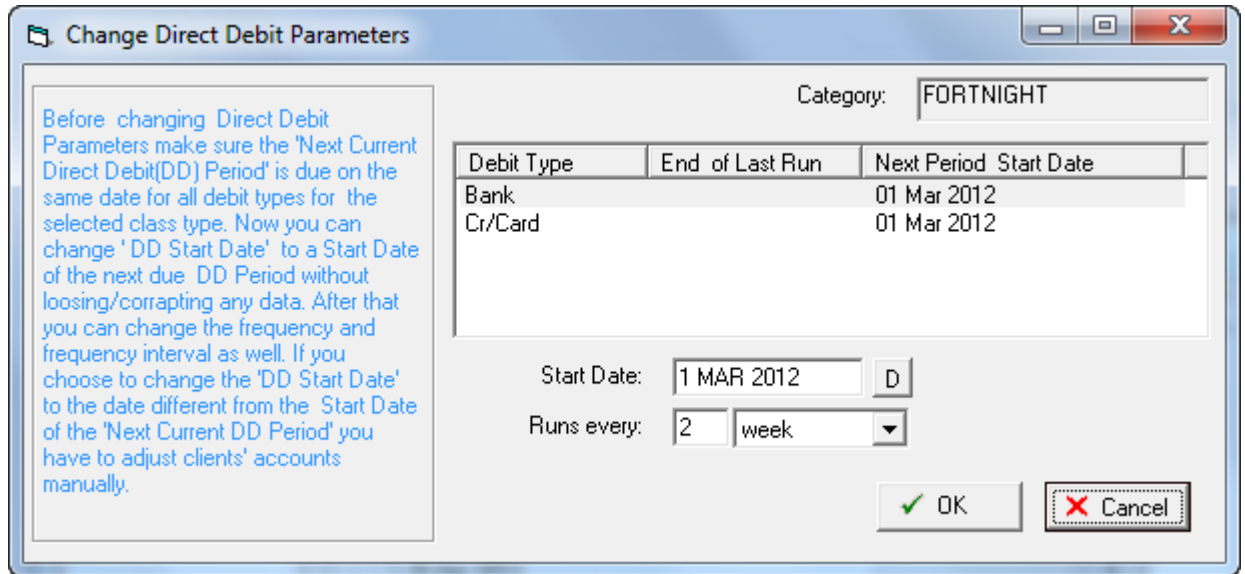
Monthly      A set day of each month e.g. the 7th



Press this button to generate the schedule



Press this button to change the direct debit schedule. The following screen will be displayed



**Change Direct Debit Parameters**

Category: FORTNIGHT

Before changing Direct Debit Parameters make sure the 'Next Current Direct Debit(DD) Period' is due on the same date for all debit types for the selected class type. Now you can change 'DD Start Date' to a Start Date of the next due DD Period without losing/corrupting any data. After that you can change the frequency and frequency interval as well. If you choose to change the 'DD Start Date' to the date different from the Start Date of the 'Next Current DD Period' you have to adjust clients' accounts manually.

Debit Type	End of Last Run	Next Period Start Date
Bank		01 Mar 2012
Cr/Card		01 Mar 2012

Start Date: 1 MAR 2012    D

Runs every: 2    week

OK    Cancel

Read through the statement carefully before changing any dates

Minimum Days  
Allowed to Process  
As a Separate DD

This number represents the number of days before the debit day (i.e. 1st of the month) that the customer is expected to pay for the next debit period.

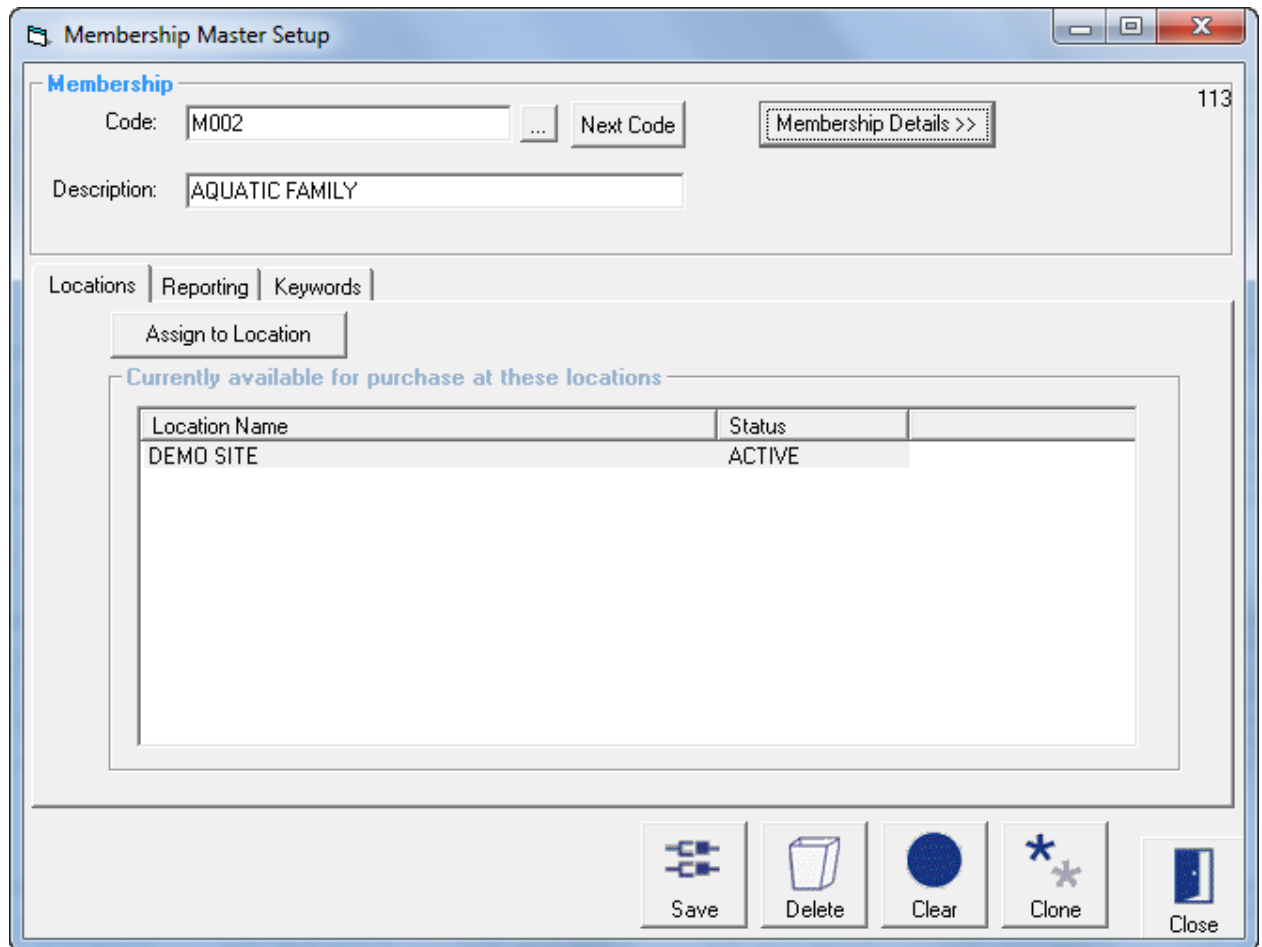
E.g. The DD day is the 1<sup>st</sup> of every month and the monthly charge is \$30.00.

A member joins on or after the 25<sup>th</sup> September 2012, with the next debit day on the 1<sup>st</sup> October 2012. The member will be asked to pay the pro-rata amount for September plus \$30 for the next month. They will then be excluding from the debit process on the 1<sup>st</sup> October 2012.

**N.B. Changes made to existing entries will affect the memberships immediately. Please seek clarification from Links Modular Solutions if you require assistance before editing information.**

## Membership Types

Admin > Memberships/VP > Membership > Types



This window is used to set up membership types, whether term, perpetual or monthly.

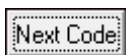
### Membership

Code

Type in a code without spaces or symbols eg: M1000. When creating new codes a mix of numbers and letters is preferable



Click this button if you wish to search for an existing membership



You also have the option of allowing Links to generate the code for you. Clicking on this button will display the next available code

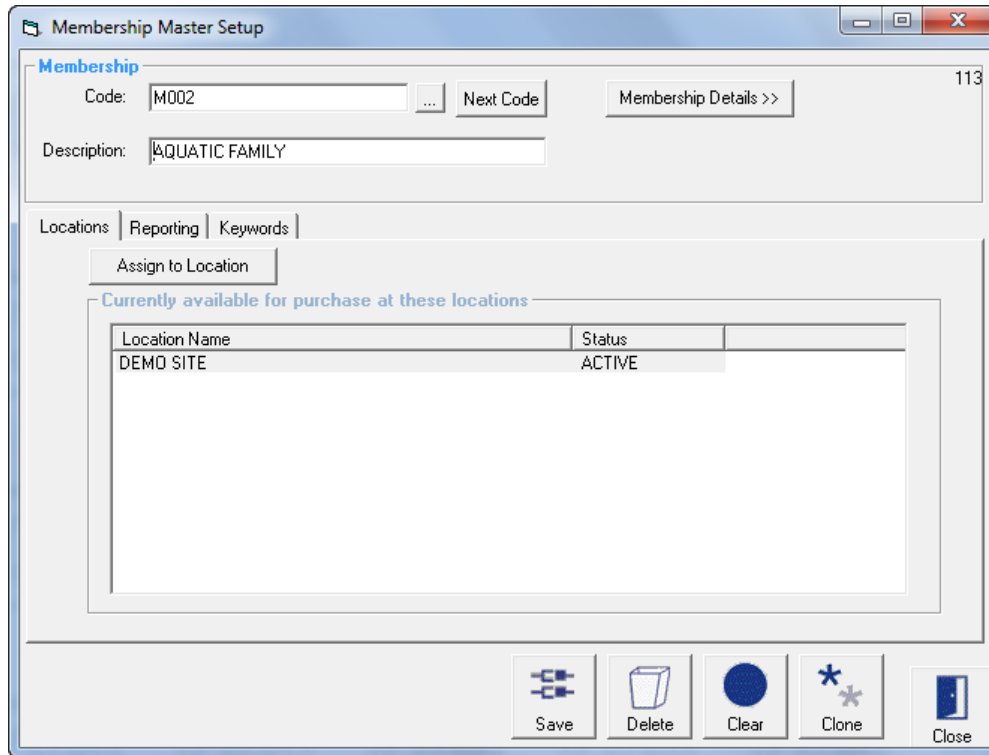
Description

Type in a description for the membership, eg: Aquatic 12 month. If choosing an existing membership the description will automatically be displayed



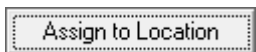
Opens the Membership Details screen – see Admin > Memberships/VP > Membership > Types > Membership Details below

Admin > Memberships/VP > Membership > Types > Locations

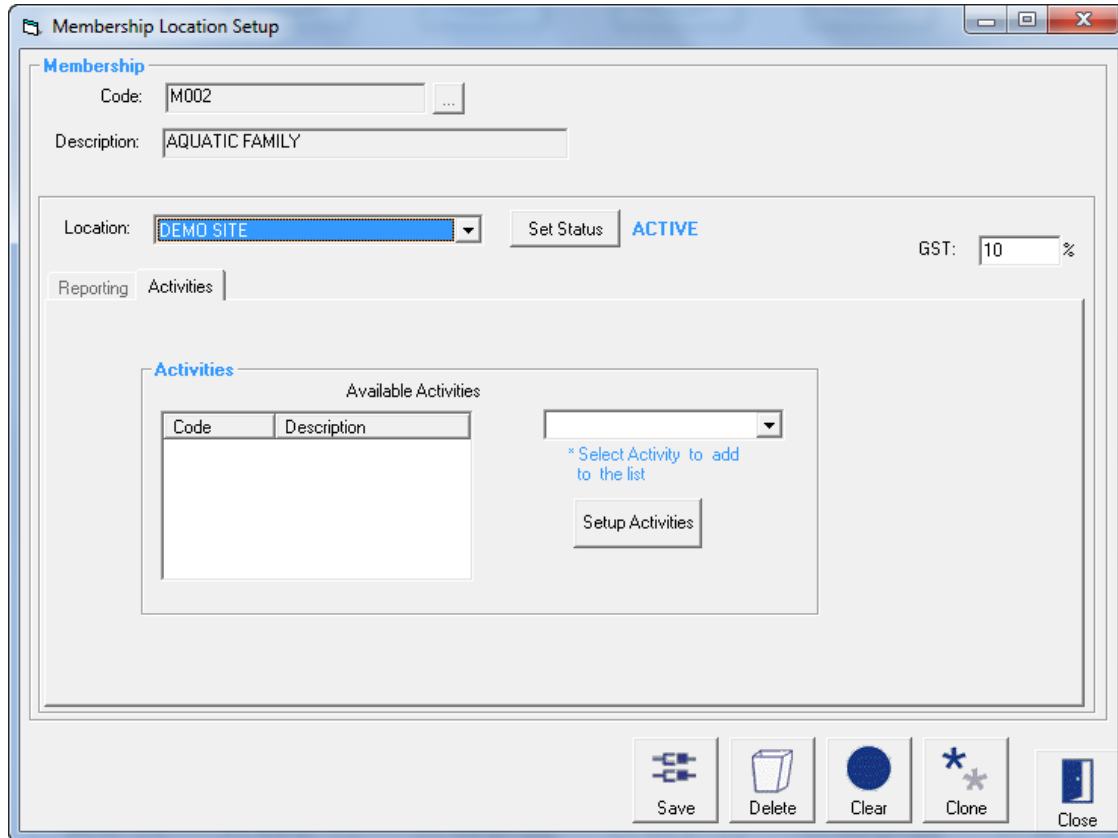


Currently available for purchase at these locations

Listed are the locations where this Membership Type has been assigned



Click this button to Assign the Membership Type to a new Location. The screen below will open



**Location**                      Select which Location to setup the Service for purchase



Press this button to change the status of the Service. This allows the status to change from Active to Inactive and visa versa. A Service that is Inactive will no longer be able to be sold

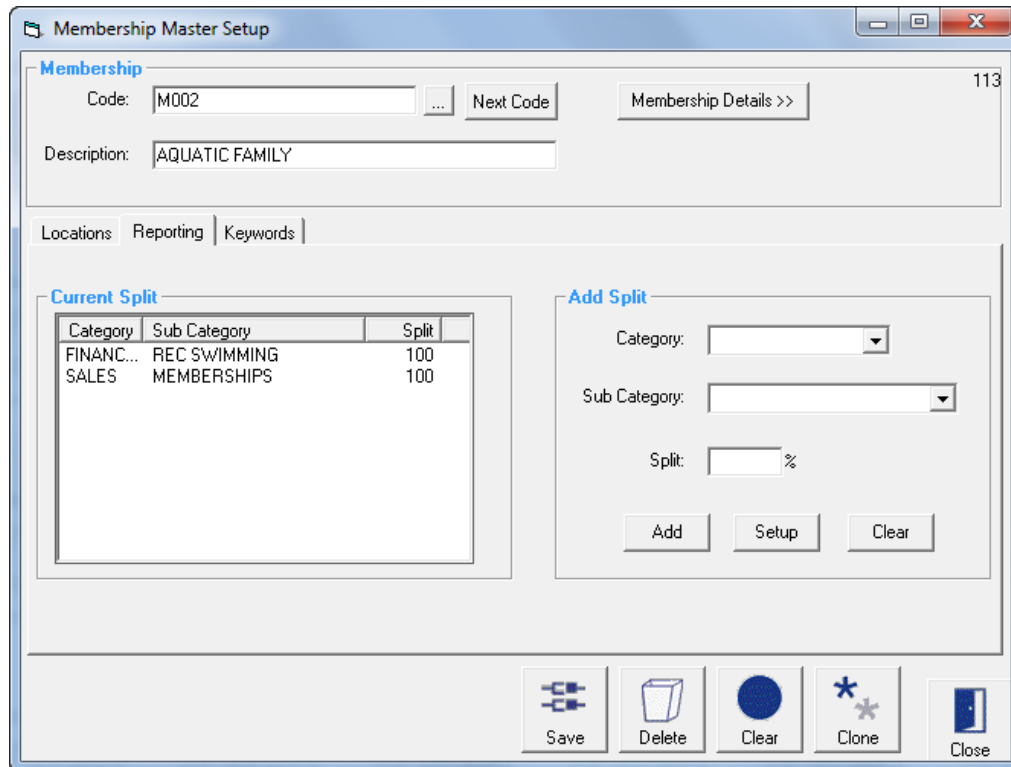
**GST**                                      The default GST will be inserted into this field when creating a new Membership Type. This is the amount of GST to be subtracted from the advertised price. This amount can be changed if required.

*Activities*

These activities are used as part of the Members Survey process that is integrated within the POS Module. When activated, upon recording a visit at the POS for all Students or customers with Memberships and Visit Passes, a dialog box will be displayed listing the activities allocated to the Class Type, Membership or Visit Pass. It is then possible to select the activities and save the information. An activities report can then be produced that displays what activities students, members and visit pass holders are utilising.

Admin > Memberships/VP > Membership > Types > Reporting

This section is used to allocate the income for this Membership Type to a category. As a minimum it is recommended that you allocate at least one category to every Membership.



**Membership Master Setup** 113

Membership Code: M002

Description: AQUATIC FAMILY

Locations | Reporting | Keywords

**Current Split**

Category	Sub Category	Split
FINANC...	REC SWIMMING	100
SALES	MEMBERSHIPS	100

**Add Split**

Category:

Sub Category:

Split:  %

### Current Split

**Category** This window lists the categories that have been assigned to this Membership Type and the % split for each category

**Deleting a Category** Highlight the category and a cross will appear, click on the cross to delete

### Add Split

From this window you have the option of creating a new category or choosing a category already created. New categories can also be created – Admin > Products/Services > Sales Category

**Category** Click on the  to search for the 'mother' category

**Sub Category** Click on the  to search for the sub category



## Split

You have the option of choosing more than one 'mother' and sub category provided the total split adds up to 100%. Links will automatically default the first category selected to 100% however you can change this value



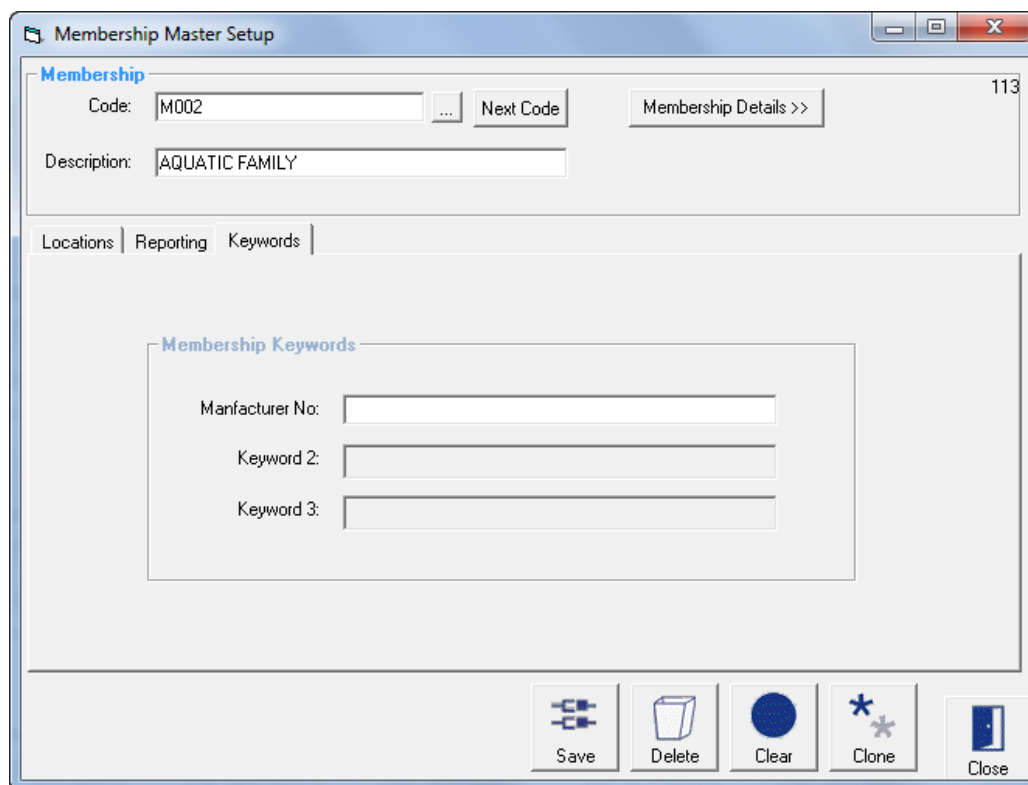
To add this category click on the 'Add' icon or clear the entry by clicking the 'Clear' button. When adding new sub categories these will appear in the category box to the left



Click on this icon to set up a new sales category and the following window will appear – see Admin > Products/Services > Sales Category

*Admin > Memberships/VP > Membership > Types > Keywords*

This window is used to help you search for this Membership when in POS Screen. This tab will only be displayed if you have created Keywords in the Setup Point of Sale screen - Admin > POS > Setup > Products > Product Keywords

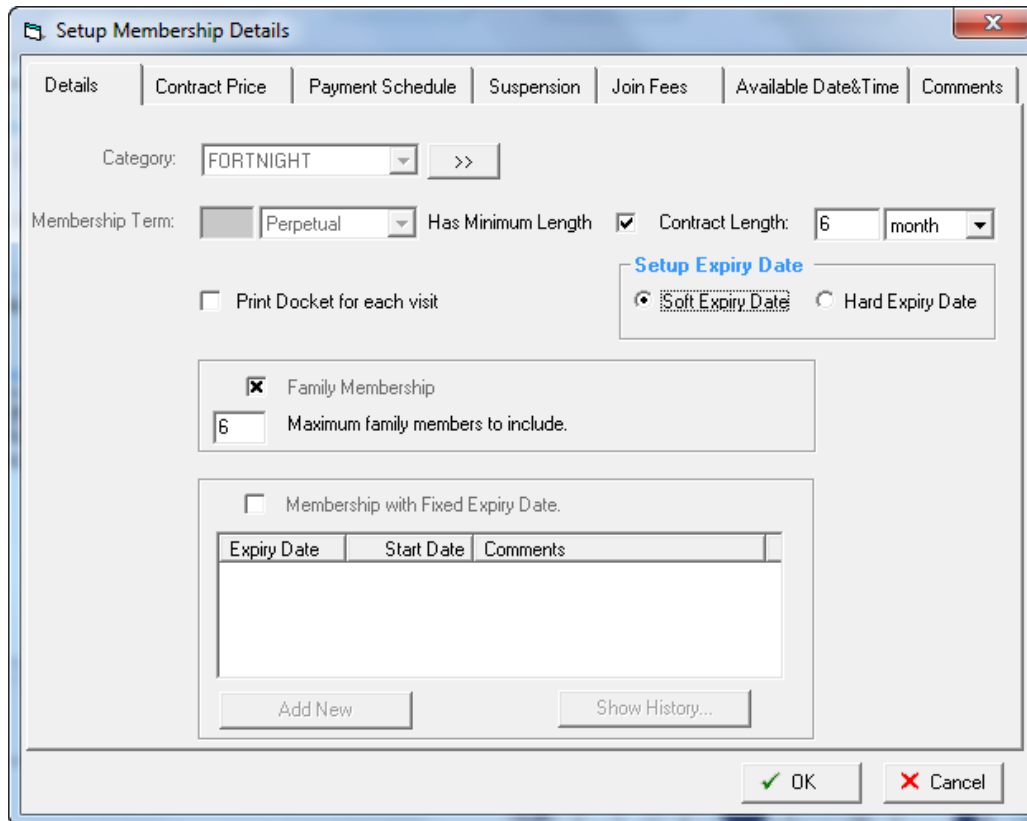


The screenshot shows the 'Membership Master Setup' window. At the top, there's a title bar with standard window controls. Below that, the 'Membership' section contains a 'Code' field with 'M002', a 'Next Code' button, and a 'Membership Details >>' button. The 'Description' field contains 'AQUATIC FAMILY'. There are three tabs: 'Locations', 'Reporting', and 'Keywords', with 'Keywords' being the active tab. The main area is titled 'Membership Keywords' and contains three input fields: 'Manufacturer No:', 'Keyword 2:', and 'Keyword 3:'. At the bottom, there is a toolbar with buttons for 'Save', 'Delete', 'Clear', 'Clone', and 'Close'.

Manufacturer No is the keyword in the above example. Enter the Manufacturer No.





Depress this icon to input membership details pertaining to the term, cost, activities, payment schedule etc



### Details

#### Category

Click on the  to display a list of membership categories. Press the  to view the category details


#### Membership Term

Establish the parameters for the membership length. Type in a number and then select the period length. There are 5 periods which can be selected

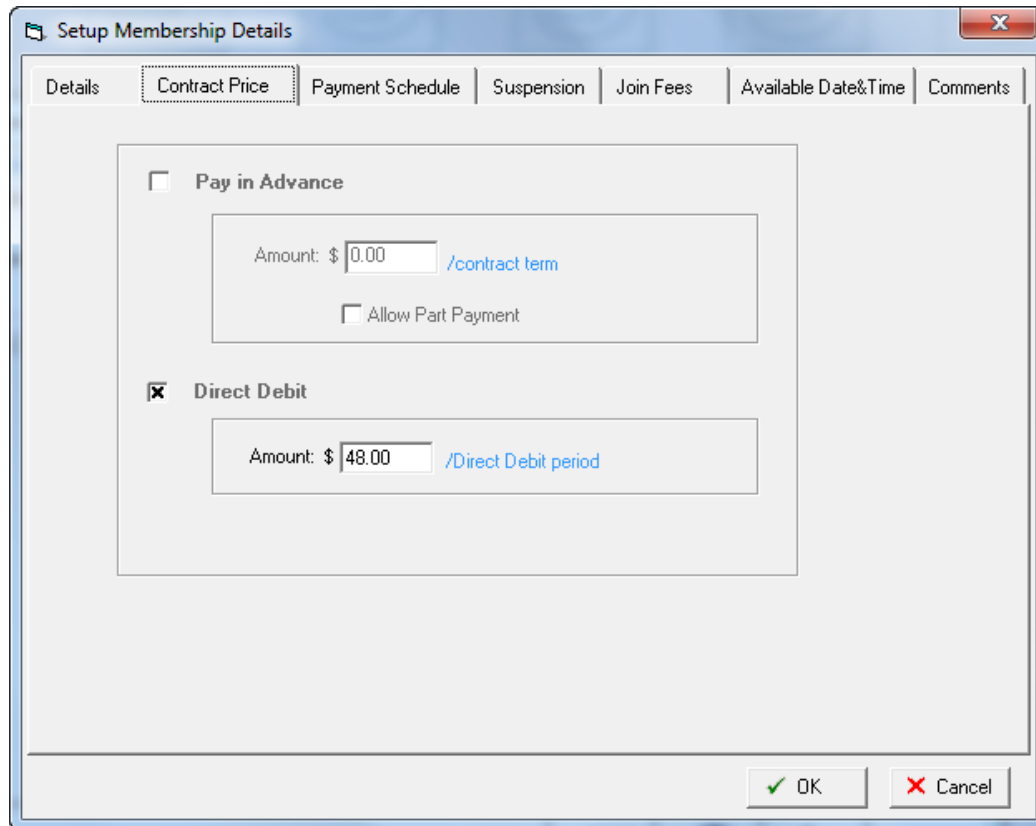
*Perpetual*                      Select this for **all** direct debit memberships

*Year*                              Select for periods measured in years

*Month*                            Select for periods measured in months

	<i>Week</i>	Select for periods measured in weeks
	<i>Day</i>	Select for periods measured in days
Has Minimum Length		Automatically sets a minimum length for Perpetual Membership Types. This gives Perpetual Members a minimum period for their contract
Contract Length		Set a contract length which can be set up using a Soft or Hard Expiry
Setup Expiry Date	<i>Soft Expiry Date</i>	Soft Expiry is shown as the Minimum Expiry date. Perpetual Contracts will have NO Expiry Date
	<i>Hard Expiry Date</i>	Hard Expiry is shown as the Current Expiry date. This will place an Expiry date against the Contract
Print docket for Each Visit		Check this box if you wish a receipt printed every time a member with this membership type visits
Family Membership		Check this box if this membership is a family membership. Family memberships allow for a nominated number of customers to be linked to this membership. These customers (family members) have no formal status within the membership therefore do not have any individual membership rights and are governed by the actions of the principle membership holder. The principle membership holder is the customer who has purchased the membership
Maximum Family Members to Include		Type in the number of customers that can be allocated to the family membership inclusive of the principle membership holder
Membership with Fixed Expiry Date		Can be selected for Membership Types other than Perpetual. Click  to nominate a Fixed Expiry date. When Membership Type is sold, the Fixed Expiry Dates nominated here will be available to select from a drop down box.
		Note: Fixed Expiry Date cannot be deleted if at least one contract has been sold

## Contract Price



**Setup Membership Details**

Details | **Contract Price** | Payment Schedule | Suspension | Join Fees | Available Date&Time | Comments

**Pay in Advance**

Amount: \$  /contract term

Allow Part Payment

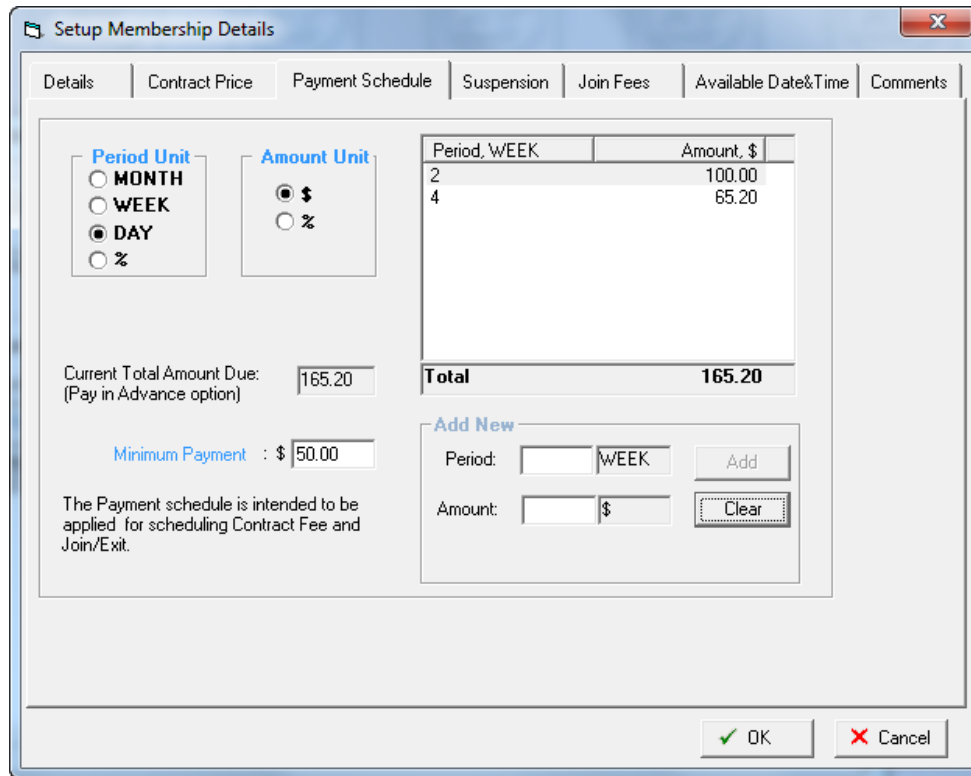
**Direct Debit**

Amount: \$  /Direct Debit period

OK Cancel

Pay in Advance	Check this box if the membership has a full upfront fee. I.e. term based memberships
Amount	Type in the full amount for the membership inclusive of GST
Allow Part Payment	Check this box if there is the ability to part pay this membership. The payment schedule tab will require data input. If this is box is not checked, this membership will not allow a part payment upon sale
Direct Debit	Check this box if the membership has a continuous period based fee. I.e. perpetual (Direct Debit) based memberships
Amount	Type in the debit amount for each period inclusive of GST

## Payment Schedule



Period, WEEK	Amount, \$
2	100.00
4	65.20
<b>Total</b>	<b>165.20</b>

In the example above the total cost for the membership is \$165.20 with a minimum payment of \$50.00. The part payment schedule is :

- 2 weeks after joining on this membership a payment of \$100.00 is required
- 4 weeks after joining on this membership a payment of \$65.20 is required

**Period Unit** Select the period unit that will be used to generate the schedule

**Amount Unit** Select the amount unit that will be used to generate the schedule. \$ is for a fixed amount and % is used when requiring a percentage of outstanding balance

**Current Total Amount Due** Displays the full price of the membership

**Minimum Payment** Type in the minimum payment amount that must be paid when selling the membership

**Add New**

The table will display the units which have been previously selected in the period unit and amount unit section.



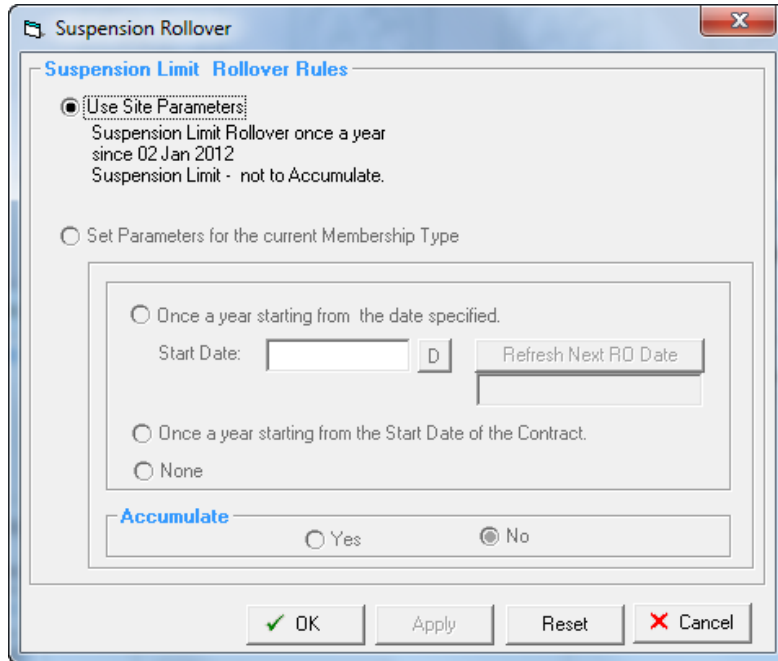
The fee is calculated on the criteria entered in the following fields

<i>Service Code</i>	Select the service code to which the money will be allocated
<i>Amount per Day</i>	Enter in a fee to charge per day or leave blank to enter a fee when performing the suspension in the Member Contact screen
<i>Fee Free Period</i>	Enter in the number of days in which the member can suspend without incurring a suspension fee
<i>Unlimited</i>	This membership allows the member to have unlimited suspension days
<i>Suspension Limit</i>	This membership allows the member to have a limited number of suspension days. Rollover rules will apply to this membership

#### Set Suspension Limit Rollover Rules

All direct debit (perpetual) memberships have the option to Set Suspension Rollover Rules. These rules dictate the actions allowed in updating suspension entitlements for long term direct debit members.

These rules are set globally in the Site Setup screen which can be found under Admin > Site > Site Setup > Memberships/VP that allows for separate suspension rollover rules for individual membership types. If this option is selected then the set suspension limit rollover rules button can be selected and rules set.



Use Site Parameters                      Shows the default site setup parameters

Set Parameters for the Current Membership Type

Once a Year from Specified Date                      This feature allows for membership contracts to have their suspension limit re-topped up to the full quota again as of the date entered

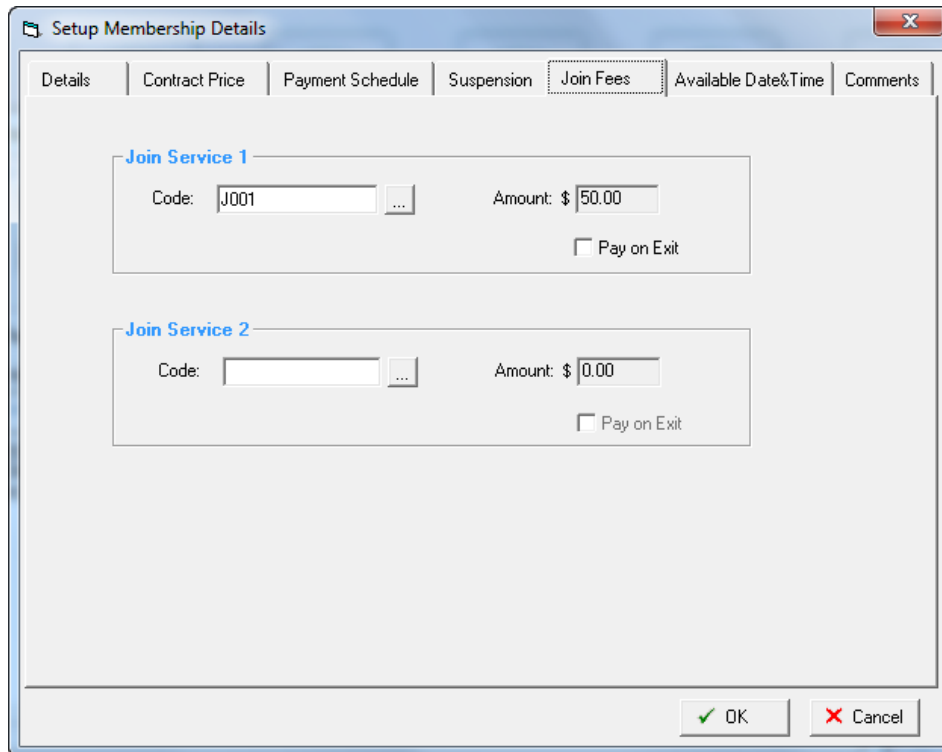
Once a Year from Start Date of Contract                      This feature allows for membership contracts to have their suspension limit re-topped up to the full quota again as of the start date of the contract

None                      No rollover rules apply

Accumulate                      Define if the suspension time top up allows for the addition of the unused suspension time to the full amount of suspension time allocation for the contract



## Join Fees



The screenshot shows a software window titled "Setup Membership Details" with a tabbed interface. The "Join Fees" tab is active. It contains two sections for configuring join fees:

- Join Service 1:**
  - Code: J001
  - Amount: \$ 50.00
  - Pay on Exit
- Join Service 2:**
  - Code: (empty)
  - Amount: \$ 0.00
  - Pay on Exit

At the bottom of the window are "OK" and "Cancel" buttons.

### Join Service 1

**Code** Select the service code to which the money will be allocated for the joining fee. This fee will be inserted when selling the membership

**Pay on Exit** Check this box if you wish the joining fee to become an exit fee that will be collected when the membership ends

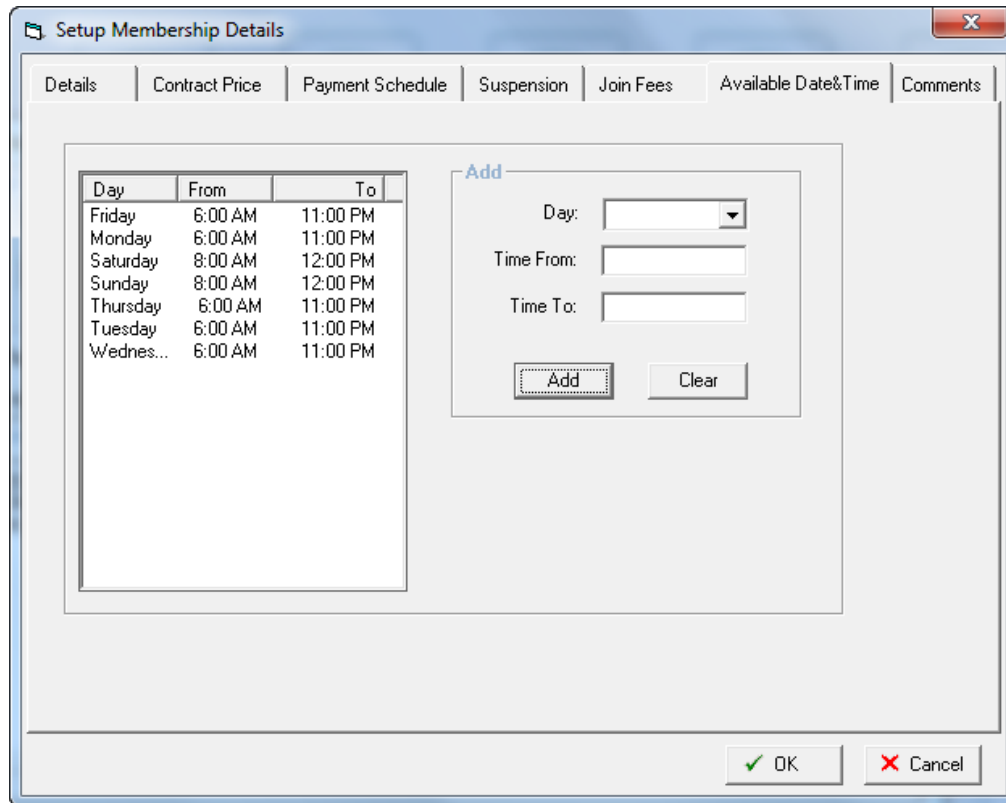
### Join Service 2

**Code** Select the service code to which the money will be allocated for the joining fee. This fee will be inserted when selling the membership

**Pay on Exit** Check this box if you wish the joining fee to become an exit fee that will be collected when the membership ends

### Available Date & Times

This screen is only use memberships that have defined entry times. Leave this screen blank for memberships that have no day/time limits.



Day	From	To
Friday	6:00 AM	11:00 PM
Monday	6:00 AM	11:00 PM
Saturday	8:00 AM	12:00 PM
Sunday	8:00 AM	12:00 PM
Thursday	6:00 AM	11:00 PM
Tuesday	6:00 AM	11:00 PM
Wednes...	6:00 AM	11:00 PM

**Add**

Day:

Time From:

Time To:

#### Add

Enter the day and times that entry is allowed.

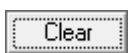
Day Use the  to select the day

Time From Type in the start time for entry

Time To Type in the end time of entry



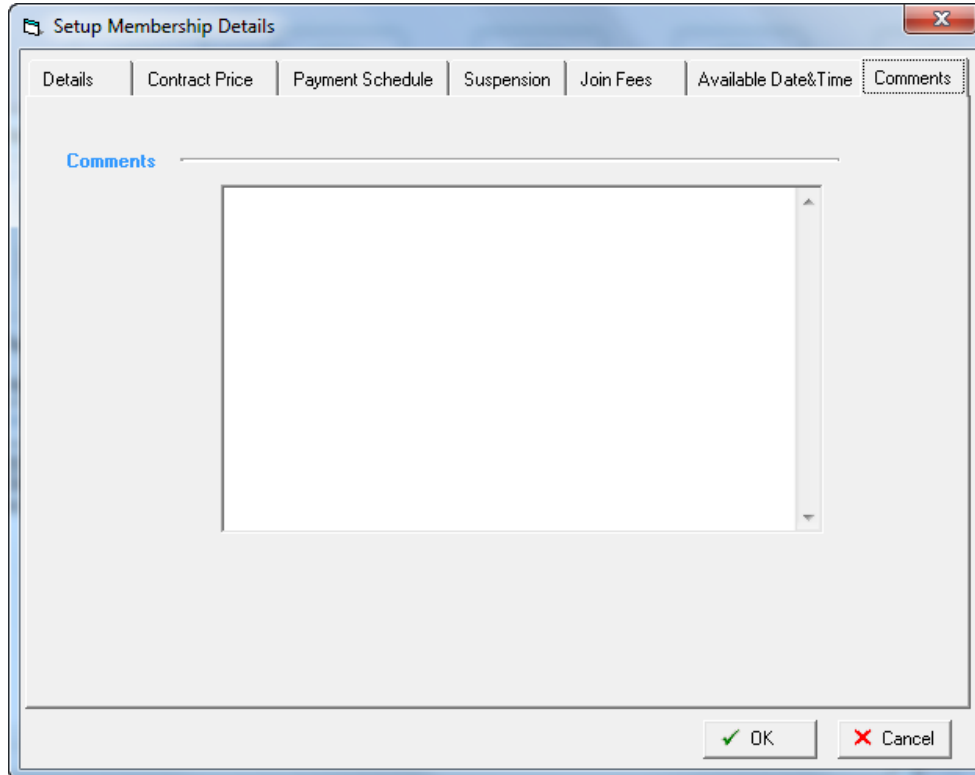
Press the Add button to add the parameters to the table



Press the Clear button to remove the parameters from the three fields

## Comments

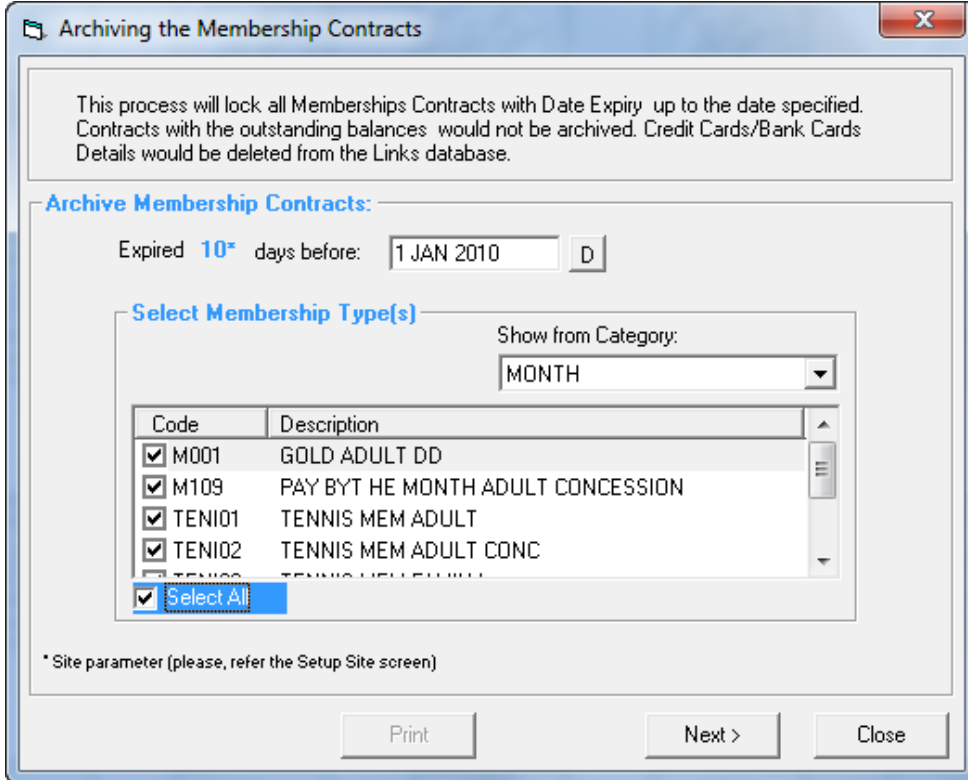
This window can be used to record comments against this membership type; it is not linked to any other functionality within Links.



## Archiving

Admin > Memberships/VP > Membership > Archiving

Expired membership contracts can be archived so that they are no longer displayed in the Member Contract screen. Memberships that have outstanding fees will not be archived. This process also removes direct debit information such as credit card numbers and bank account details from direct debit memberships.



This process will lock all Memberships Contracts with Date Expiry up to the date specified. Contracts with the outstanding balances would not be archived. Credit Cards/Bank Cards Details would be deleted from the Links database.

**Archive Membership Contracts:**

Expired **10\*** days before:

**Select Membership Type(s)**

Show from Category:

Code	Description
<input checked="" type="checkbox"/> M001	GOLD ADULT DD
<input checked="" type="checkbox"/> M109	PAY BY THE MONTH ADULT CONCESSION
<input checked="" type="checkbox"/> TENI01	TENNIS MEM ADULT
<input checked="" type="checkbox"/> TENI02	TENNIS MEM ADULT CONC
<input checked="" type="checkbox"/> Select All	

\* Site parameter (please, refer the Setup Site screen)

### Archive Membership Contracts

#### Expire 10 Days Before

Select a date. This date will be used as the calculation point for defining if a membership contract is expired. In the example above, any membership contract that was expired at least 10 days before the 1 January 2010 will be selected for archiving.

Note: the figure 10 is a parameter that is established in the Site Setup screen which can be found at Admin > Site > Site Setup > Memberships & VP

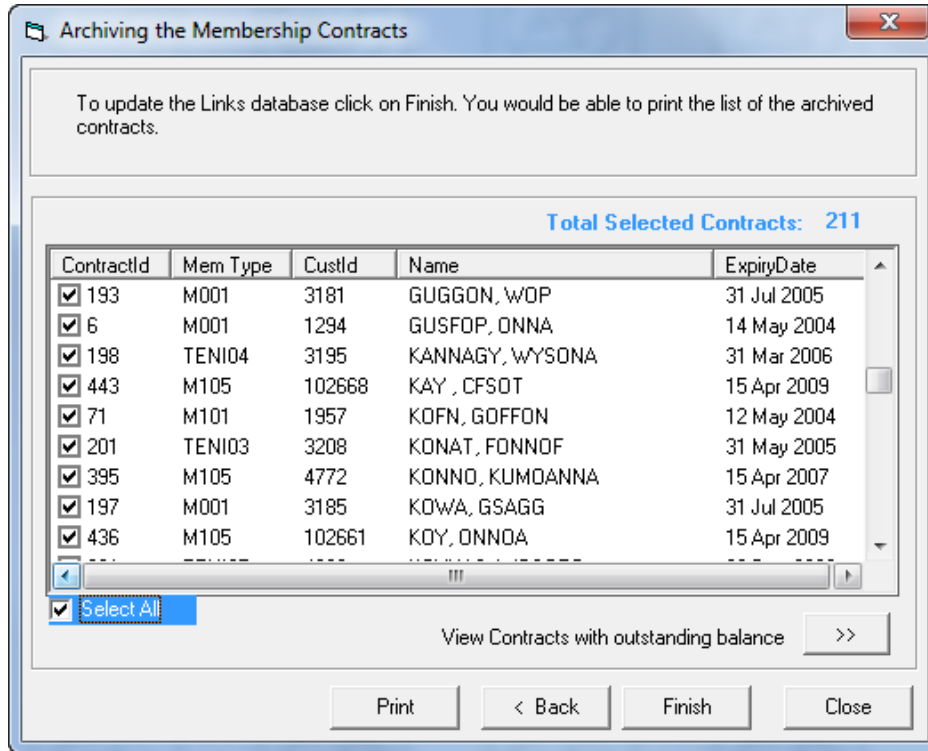
#### Select Membership Types

#### Show from Category

Select a membership category to display the memberships linked to the category and then select the memberships to include in the process

Next

Press the next button and the following screen will be displayed that lists all the members whose membership contracts will be archived



Select All

Select the members or members whose membership contracts are to be archived

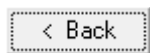
View Contracts with outstanding balance



Contracts expired before the date defined, with outstanding balances and/or Direct Debit last payments have not been made



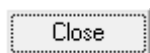
Press the Print button to print a list of the members selected



Press the Back button to return to the previous screen



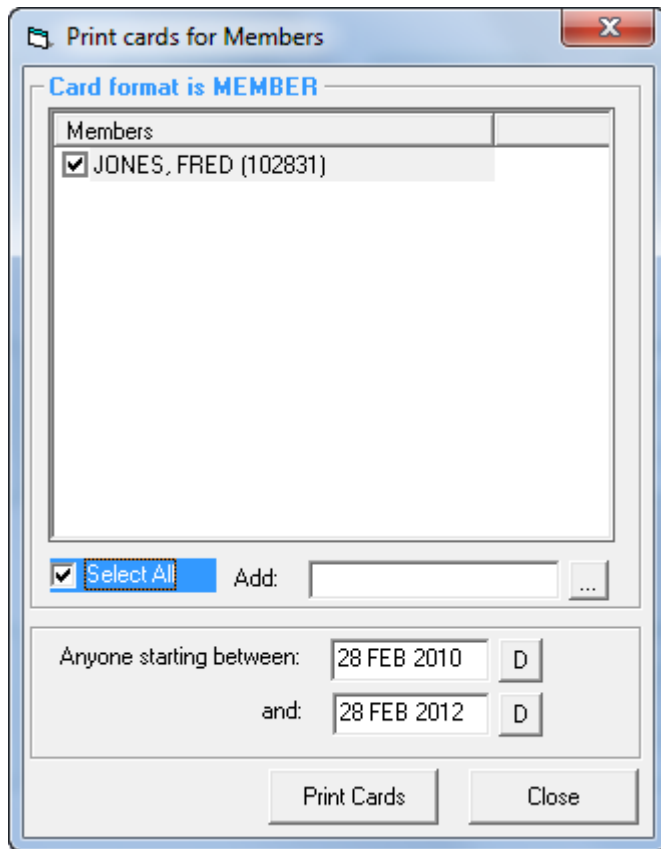
Press the Finish button to finalise the archiving process



Press the **Close** button to stop the archiving process

## Bulk Card Print

Admin > Memberships/VP > Membership > Bulk Card Print



As a new member is added to the system their name is included in the bulk card print system.

Tick the box to select a member for printing. Once the card is printed their name is removed from the list.

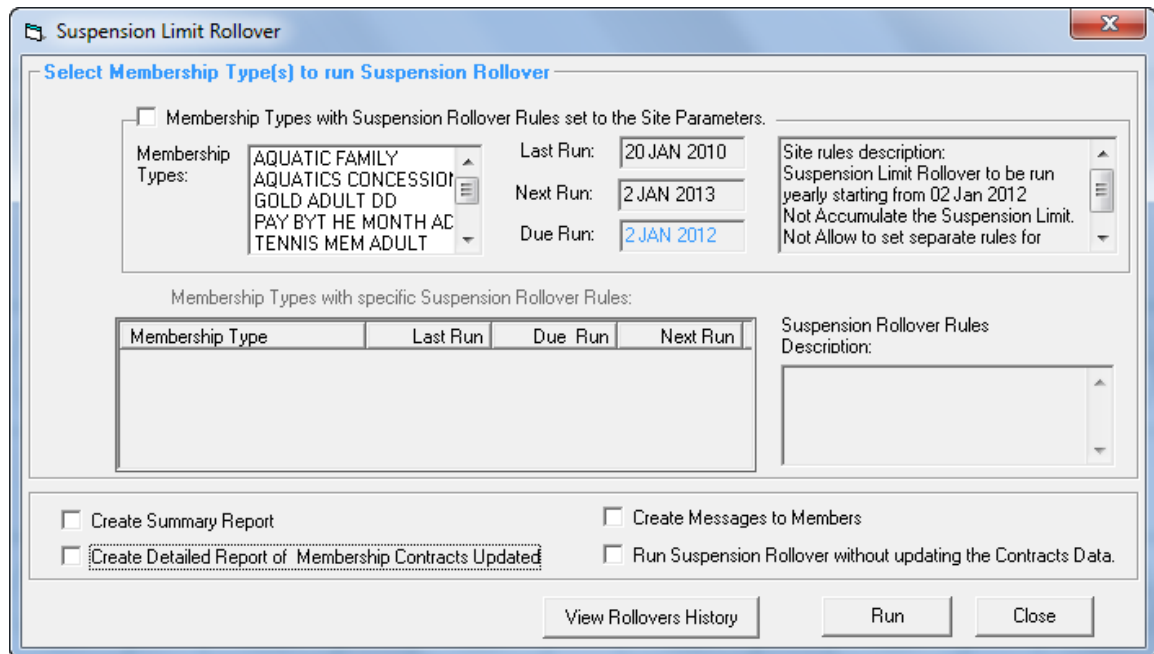
Alternatively a member can be added to the list by using the Add feature.

The card layout for the Member card is defined at Admin > Admin > Cards > Card Layout

## Suspension Rollover

Admin > Memberships/VP > Membership > Suspension > Rollover

This screen allows for the processing of updating suspension limits based on the membership suspension rollover rules.



Membership Types	Lists all the membership types that are using the site rollover parameters
Last Run	Lists the date when the last rollover process was run
Next Run	Lists the date when the next rollover process should be run
Due Run	Lists the date when the rollover process should have been run
Site Rules	Displays the site rollover rules that relate the memberships types displayed
Membership Types with Specific Rules	Lists all the membership types that are using specific rollover rules, i.e. not the site rules
Specific Rollover Rules	Displays the specific rollover rules that relate the memberships types displayed

There are several check boxes which produce various reports or actions as part of this process. Check the boxes as required.



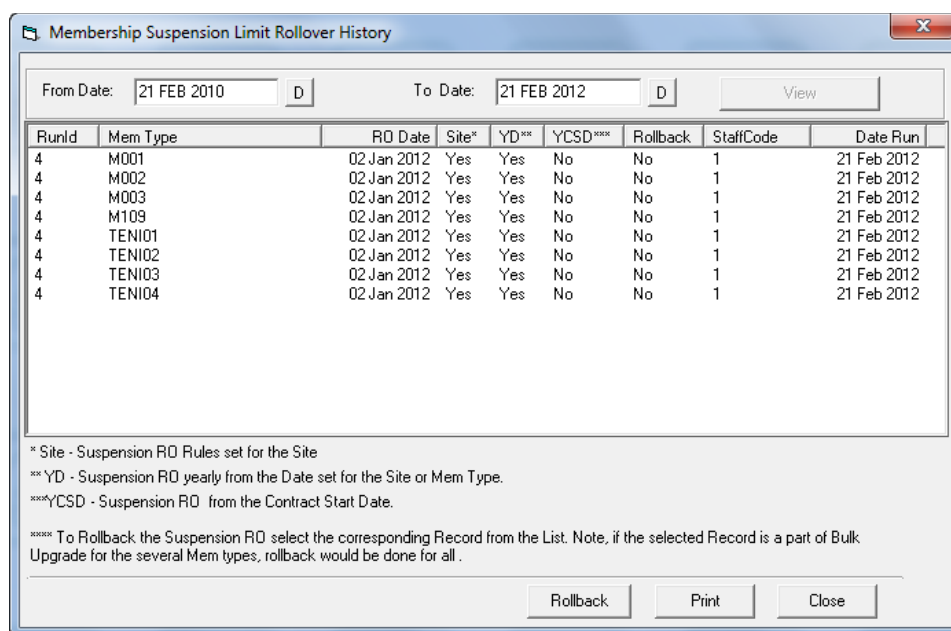
Press this button to display a list of previous rollover processes



Press this button to run the process

### Suspension Rollover History

Admin > Memberships/VP > Membership > Suspension > Rollover History



From Date

Select a start date to define the search parameter

To Date

Select an end date to define the search parameter



Press the view button to display any rollover process that occurred between the two dates selected



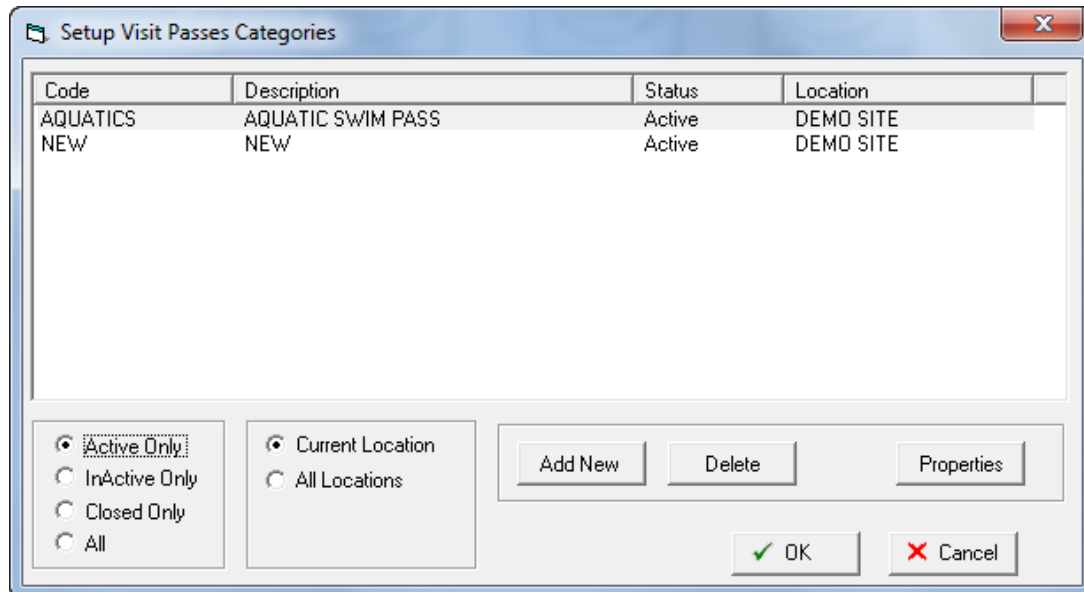
It is possible to rollback the rollover suspension process. The rollback will return all members within the memberships types included in the process back to their previous suspension allocation.

Highlight the membership types to rollback and press the rollback button. Not all those membership types that were run in bulk will be rolled back. These can be identified by having the same run ID number



**Visit Pass Categories**

Admin &gt; Memberships/VP &gt; Visit Passes &gt; Categories

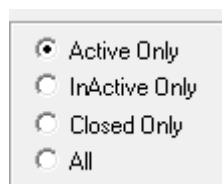


This window is used to allocate Categories to Visit Passes.

Placing a Visit Pass into a category allows for simplification when running processes or reports which allow for the selection by Category. It also ensures that visit passes can run concurrently.

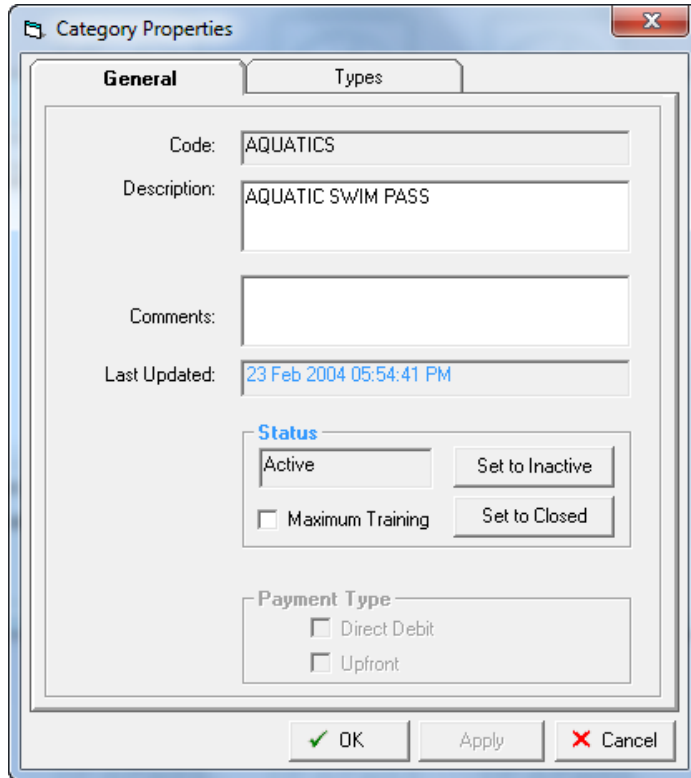
A good example of this is: A customer may have a 10x gym visit pass and a 5x personal training. They can obviously use these at the same time, therefore they need to be in different categories, as when they scan in, they are given the option of what visit pass they want to use.

The main screen displays all the Visit Pass Categories and their status, with the default view being active only. Alternatively the view can be changed by selecting a view from



Admin > Memberships/VP > Visit Passes > Categories > Add New Category

Press the  button on the main screen

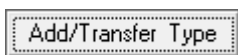
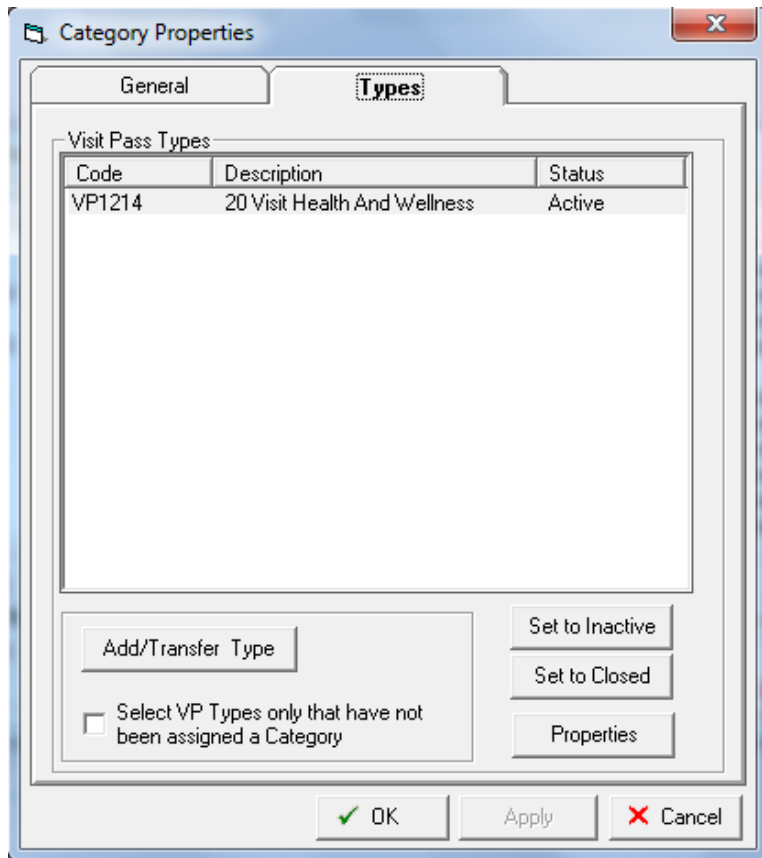


### General

Code	Type in a code to represent the Category; do not use spaces or symbols
Description	Type in a full description
Comments	This is an open field that can be used to store further information relating to this Category. The comments entered are not connected to other functions
Last Updated	If modifying an existing category the date will display, indicating the last time this Category was edited
Status	The default setting is Active once this record is saved. There is also the ability to change the status at a later date if required
Payment Type	These options cannot be modified as all Visit Passes must be paid in full upon purchase

## Types

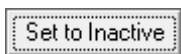
Listed are the Visit Pass Types within the Category



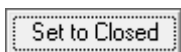
Select this button and a list of Visit Passes will be displayed. Select the Visit Pass to add to this Category

Select Mem Types only that have not been Assigned a Category

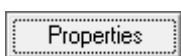
Check this box to only display those Visit Pass types that have not been assigned a Category when the Add/Transfer button is pressed



Highlight a Visit Pass type and press this button if you wish to change the status of the Visit Pass to inactive



Highlight a Visit Pass type and press this button if you wish to change the status of the Visit Pass to Closed. This will only be possible if there are no current or future Visit Pass contracts

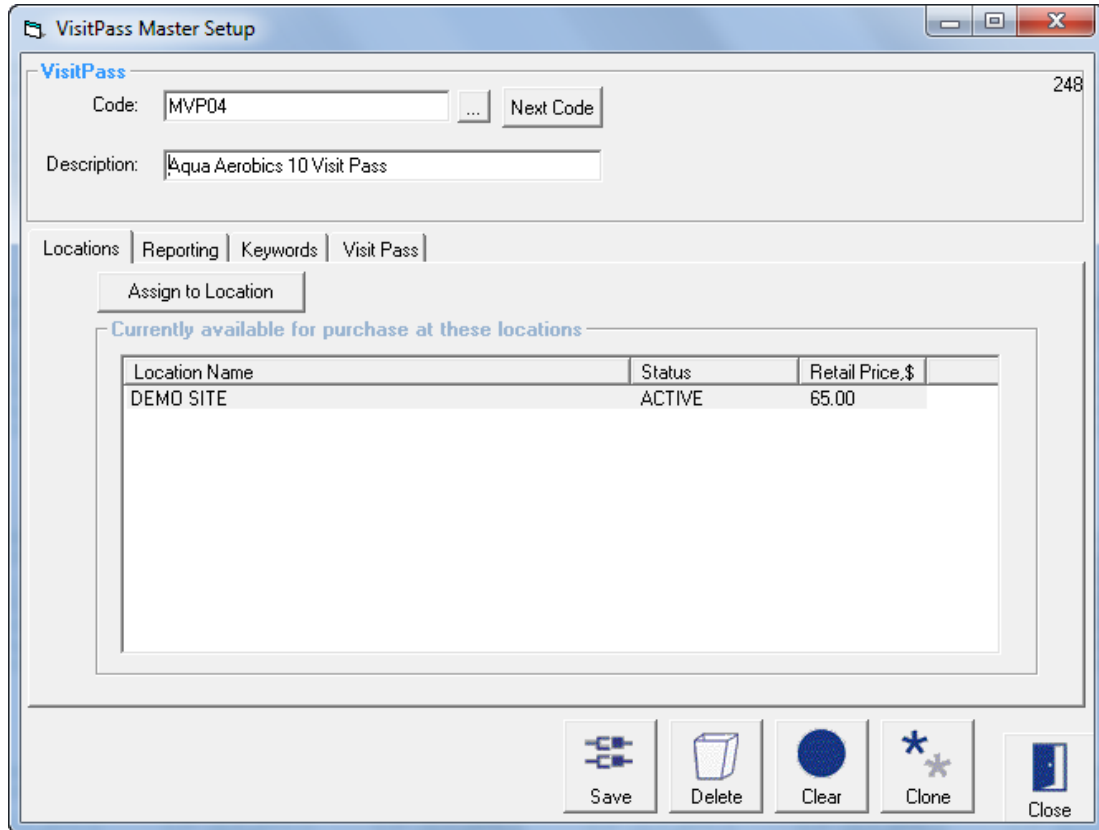


Highlight a Visit Pass type and press this button if you wish to view the Visit Pass properties, via the Visit Pass setup screen

## Visit Pass Types

Admin > Memberships/VP > Visit Passes > Types

This window is used to set up Visit Passes.



VisitPass Master Setup

VisitPass 248

Code: MVP04 ... Next Code

Description: Aqua Aerobics 10 Visit Pass

Locations | Reporting | Keywords | Visit Pass

Assign to Location

Currently available for purchase at these locations

Location Name	Status	Retail Price,\$
DEMO SITE	ACTIVE	65.00

Save Delete Clear Clone Close

Visit Pass

### Code

Type in a code without spaces or symbols eg: VP1000. When creating new codes a mix of numbers and letters is preferable



Click this button if you wish to search for an existing Visit Pass

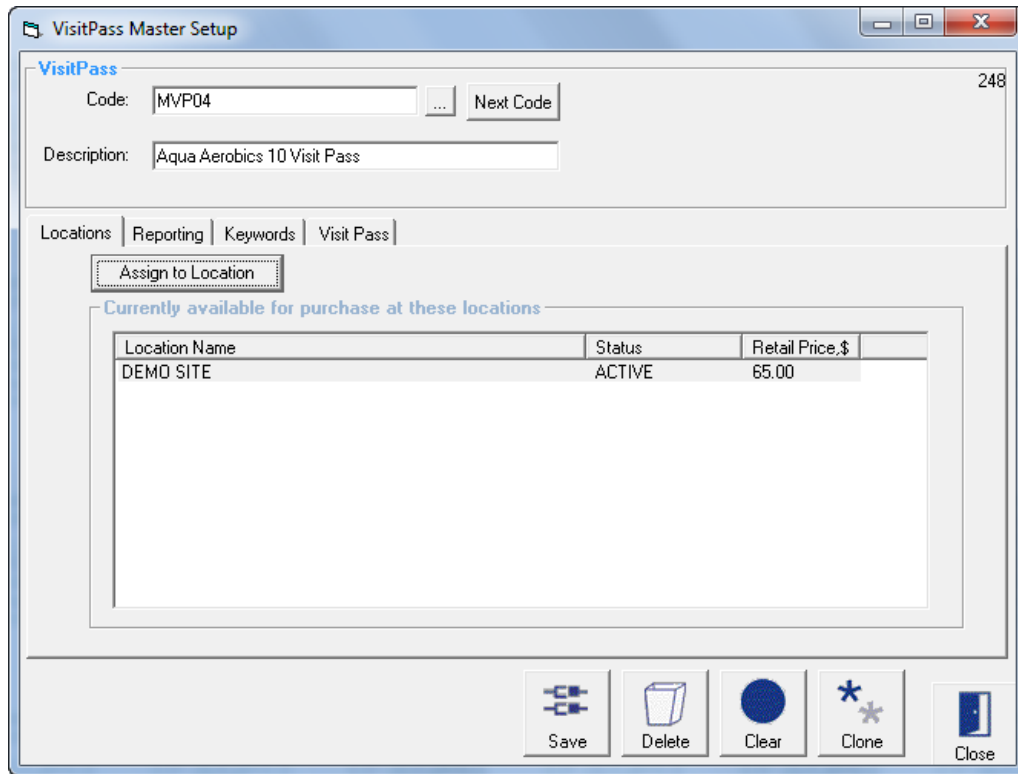


You also have the option of allowing Links to generate the code for you. Clicking on this button will display the next available code

### Description

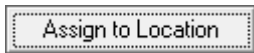
Type in a description for the Visit Pass, eg: Adult 10 Swims. If choosing an existing Visit Pass the description will automatically be displayed

Admin > Memberships/VP > Visit Passes > Types > Locations

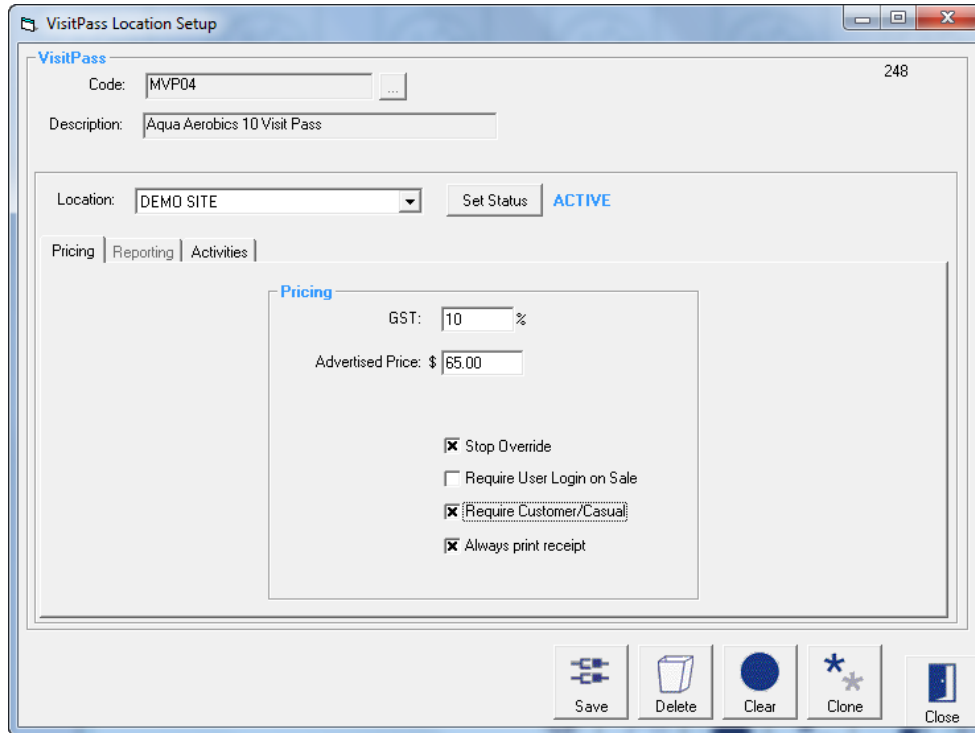


Currently available for purchase at these locations

Listed are the locations where this Visit Pass has been assigned



Click this button to Assign the Visit Pass to a new Location. The screen below will open



## Location

Select which Location to setup the Visit Pass for purchase



Press this button to change the status of the Visit Pass. This allows the status to change from Active to Inactive and vice versa. A Visit Pass that is Inactive will no longer be able to be sold

## Pricing

GST	The default GST will be inserted into this field when creating a new Visit Pass. This is the amount of GST to be subtracted from the advertised price. This amount can be changed if required
Advertised Price	Type in the price you would like this visit pass to be sold for, inclusive of GST
Stop Override	Click this box if you do not allow the advertised price of this visit pass to be overridden at point of sale
Require User Login on Sale	You may choose to record the cashiers name against all sales made to this visit pass. If you haven't nominated this feature as a Setup requirement in POS Setup, then this option allows you to activate it on individual visit passes. Click in the box to activate this function

Require Customer/Casual

Select this option to make it mandatory to allocate POS transaction to a Customer or enter a Casual user's name. Visit Pass sales will always be allocated to a Customer regardless

Always print receipt

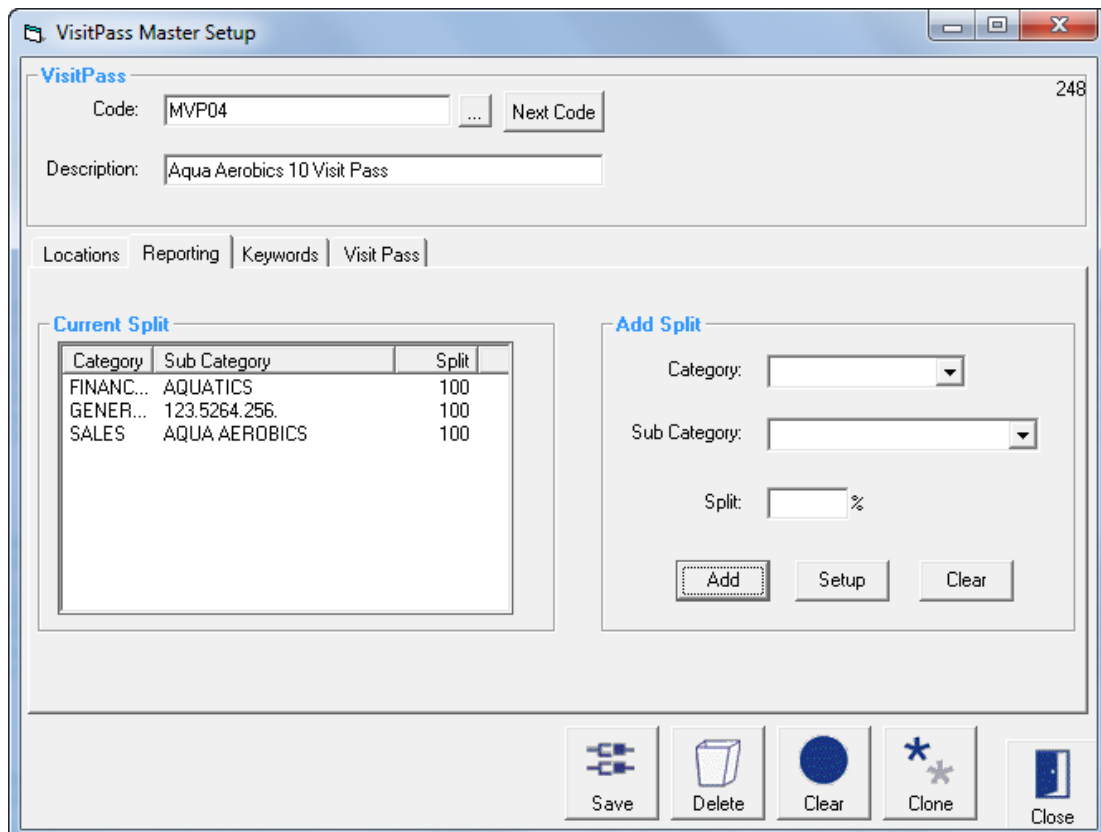
Check this box if you wish for a receipt to be printed on every sale of this Visit Pass. Visit pass sales will always print receipt regardless

### Activities

These activities are used as part of the Members Survey process that is integrated with the **POS** Module. When activated, upon recording a visit at point of sale for all Students or customers with Memberships and Visit Passes, a dialog box will be displayed listing the activities allocated to the Class Type, Membership or Visit Pass. It is then possible to select the activities and save the information. An activities report can then be produced that displays what activities students, members and visit pass holders are utilising.

*Admin > Memberships/VP > Visit Passes > Types > Reporting*

This section is used to allocate the income for this Visit Pass to a category. As a minimum it is recommended that you allocate at least one category to every Visit Pass.



**VisitPass** 248

Code: MVP04 Next Code

Description: Aqua Aerobics 10 Visit Pass

Locations Reporting Keywords Visit Pass

**Current Split**

Category	Sub Category	Split
FINANC...	AQUATICS	100
GENER...	123.5264.256.	100
SALES	AQUA.AEROBICS	100

**Add Split**

Category: [Dropdown]

Sub Category: [Dropdown]

Split: [Text] %

Add Setup Clear

Save Delete Clear Clone Close

## Current Split

**Category** This window lists the categories that have been assigned to this Visit Pass Type and the % split for each category

**Deleting a Category** Highlight the category and a cross will appear, click on the cross to delete

## Add Split

From this window you have the option of creating a new category or choosing a category already created. New categories can be created here – Admin > Products/Services > Sales Category

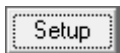
**Category** Click on the  to search for the 'mother' category

**Sub Category** Click on the  to search for the sub category

**Split** You have the option of choosing more than one 'mother' and sub category provided the total split adds up to 100%. Links will automatically default the first category selected to 100% however you can change this value



To add this category click on the 'Add' icon or clear the entry by clicking the 'Clear' button. When adding new sub categories these will appear in the category box to the left

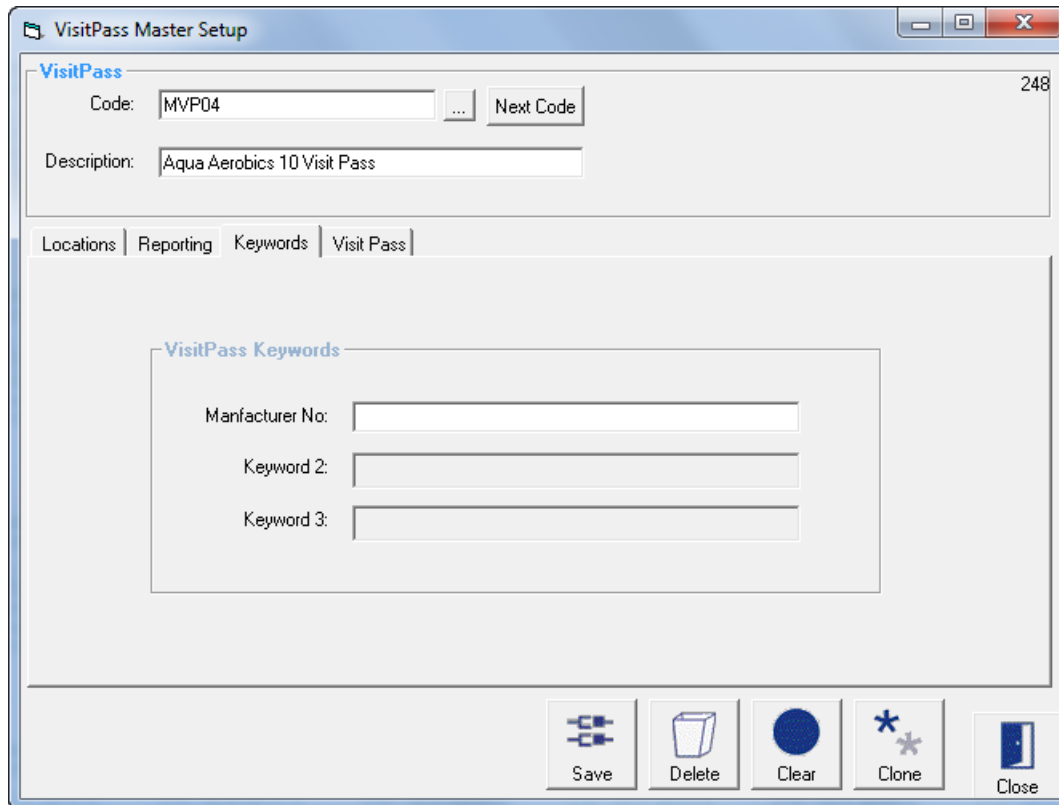


Click on this icon to set up a new sales category and the following window will appear – see Admin > Products/Services > Sales Category



Admin > Memberships/VP > Visit Passes > Types > Keywords

This window is used to help you search for this Visit Pass when in POS Screen. This tab will only be displayed if you have created Keywords in the Setup POS screen - Admin > POS > Setup > Products > Product Keywords

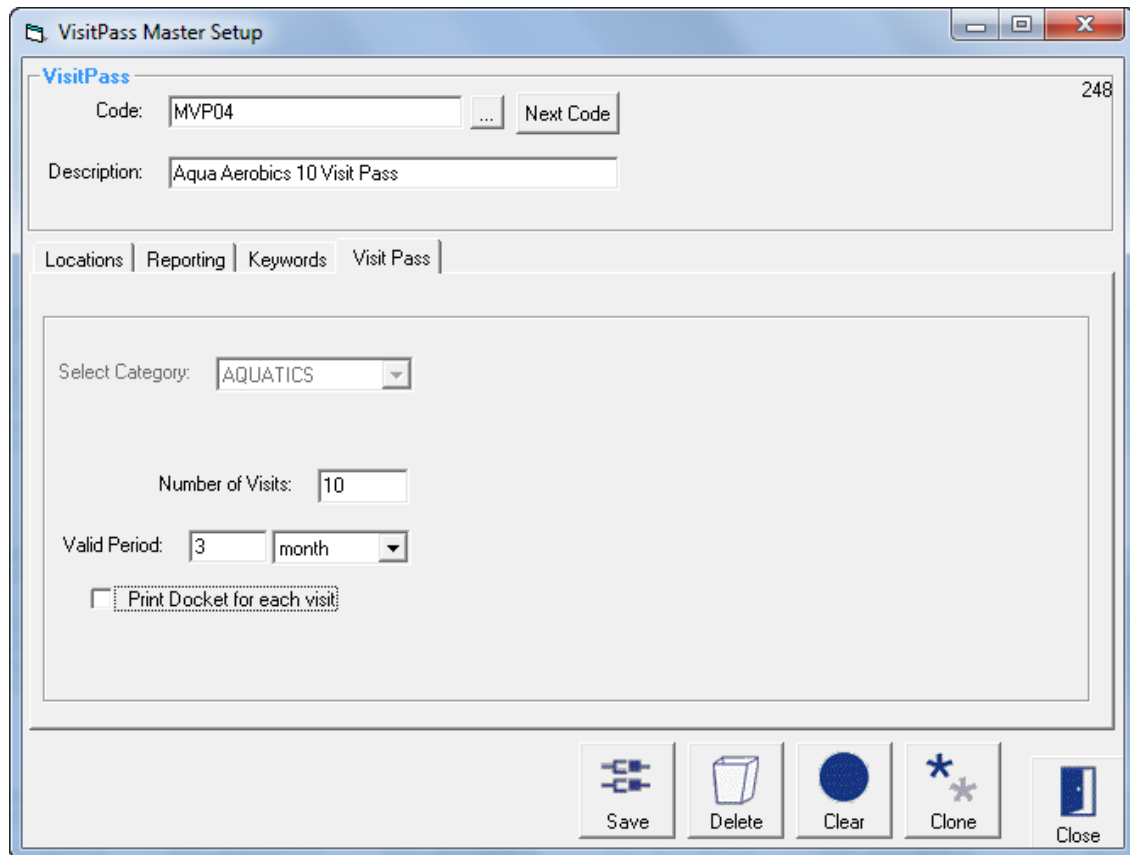


The screenshot shows a software window titled "VisitPass Master Setup". At the top, there is a "VisitPass" section with a "Code" field containing "MVP04" and a "Next Code" button. Below it is a "Description" field containing "Aqua Aerobics 10 Visit Pass". A navigation bar below the description has tabs for "Locations", "Reporting", "Keywords", and "Visit Pass", with "Keywords" currently selected. The main area is titled "VisitPass Keywords" and contains three input fields: "Manufacturer No:", "Keyword 2:", and "Keyword 3:". At the bottom of the window is a toolbar with five buttons: "Save", "Delete", "Clear", "Clone", and "Close".

Manufacturer No is the keyword in the above example. Enter the Manufacturer No.

Admin > Memberships/VP > Visit Passes > Types > Visit Pass

This tab is used to define the parameters of the visit pass



Select Category

Select a visit pass category

Number of Visits

Enter in the total number of visits that will be allowed

Valid Period

Enter the length of time that the visit pass will be valid for. This feature will create an expiry date for the visit pass which will take effect even if there are visits remaining. Alternatively the valid period can be set to "perpetual" and no expiry date will be used

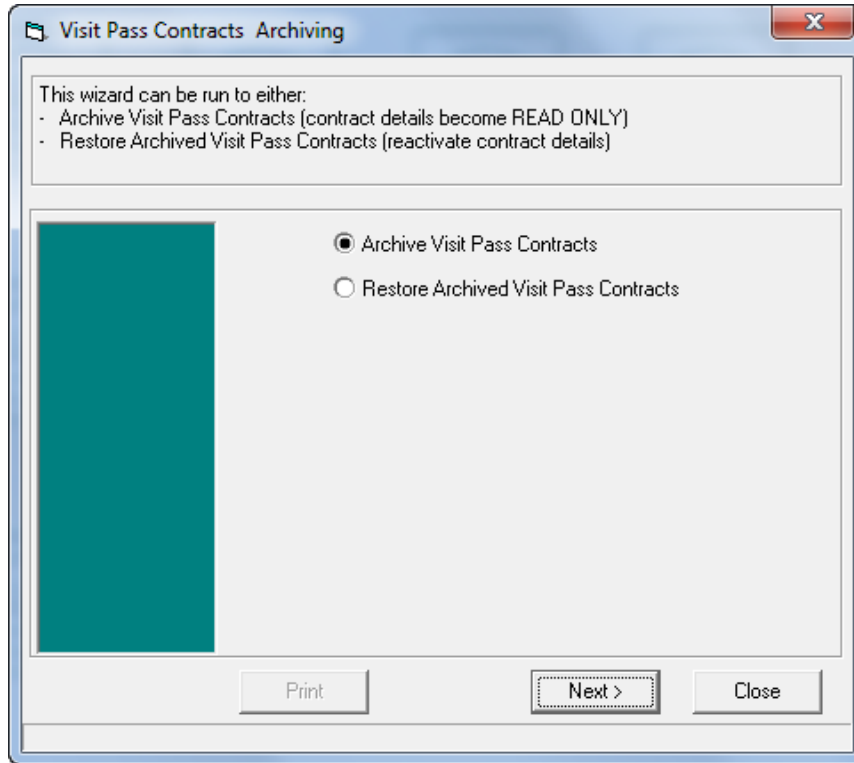
Print Docket for each visit

Check this box if you wish a receipt printed every time a Visit Pass holder visits

## Visits Pass Archiving

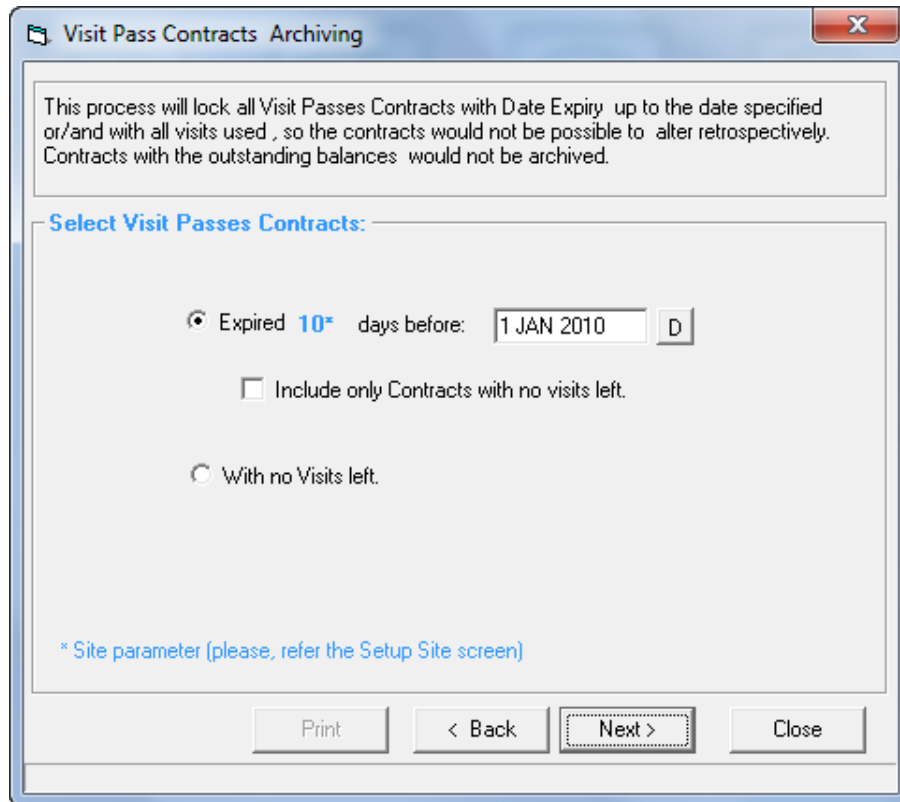
Admin > Memberships/VP > Visits Passes > Archiving

Expired Visit Pass contracts can be archived so that they are no longer displayed in the Maintain Visit Pass screen. Visit Passes that have outstanding fees will not be archived. Alternatively, Visit Pass contracts that have been archived can be restored, either in bulk or for individual customers.



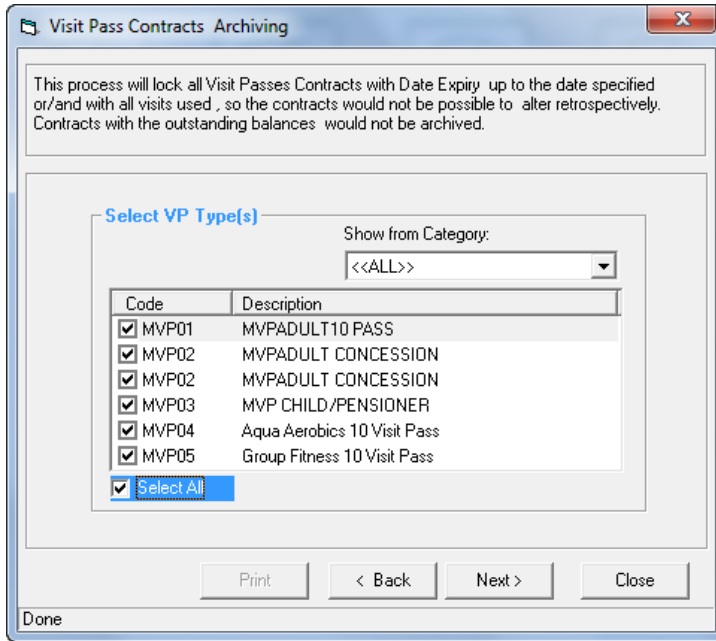
## Archive Visit Pass Contracts

1. Select Archive Visit Pass contracts and click the  button.



- |  |   |
|--|---|
| Expire 10 Days Before                      | Select at date. This date that will be used as the calculation point for defining if a Visit Pass contract is expired. In the example above, any Visit Pass contract that was expired at least 10 days before the 1 January 2010 will be selected for archiving. Note: the figure 10 is a parameter that is established in the Site Setup screen which can be found at Admin > Site > Site Setup > Memberships & VP |
| Include only Contracts with No Visits Left | If this feature is selected, the process will use the date criteria above but only select contracts with no remaining visits  |
| With No Visits Left                        | If this feature is select, the process will select all contracts that have no visits left regardless of the expiry date   |

2. Press the  button

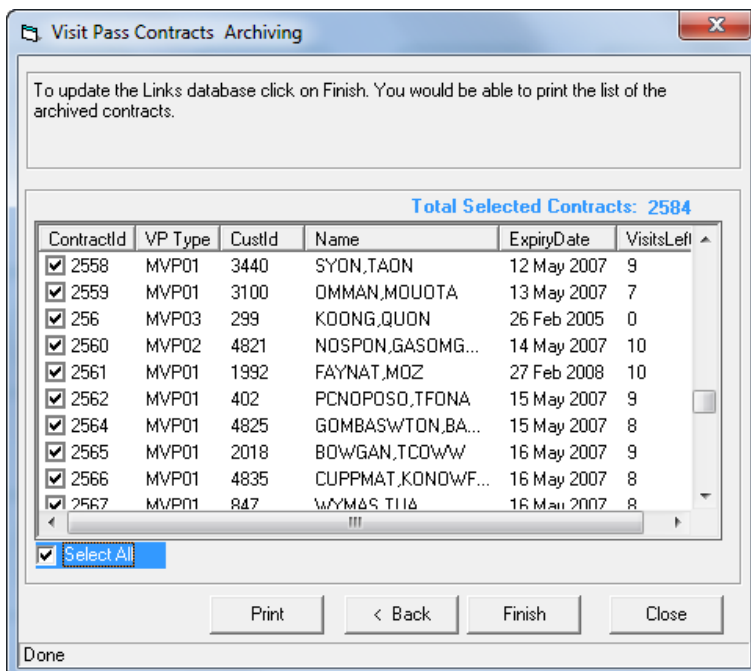


### 3. Select Visit Pass Types

Show from Category

Select a visit pass category to display the visit passes linked to the category and then select the visit passes to include in the process

### 4. Press the button



Select All

Select the customer or customers whose visit pass contracts are to be archived



Press the Print button to print a list of the customers selected



Press the Back button to return to the previous screen



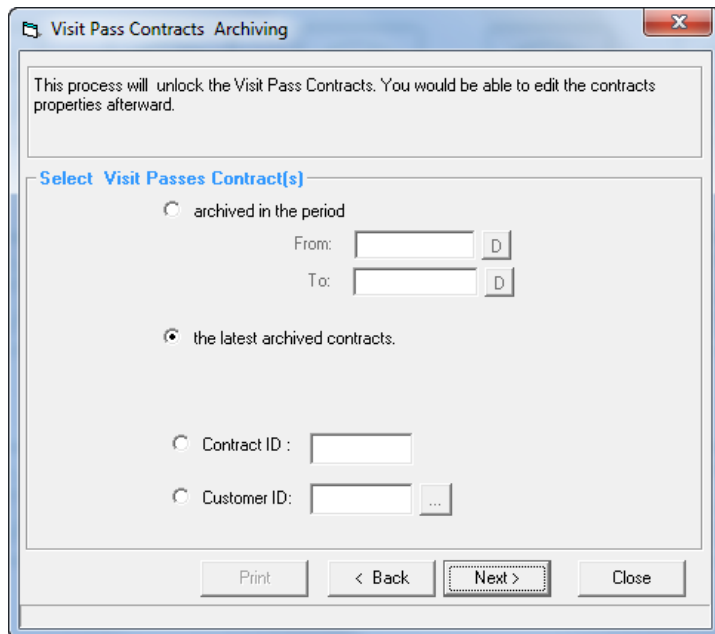
Press the Finish button to finalise the archiving process



Press the Close button to stop the archiving process

### Restore Archived Visit Pass Contracts

1. Select Restore Archived Visit Pass Contracts and press the  button.



Archived in the Period

Select between two dates to identify the period when an archiving process was run

The Latest Archived Contracts

Select this option to view the last archived contracts only

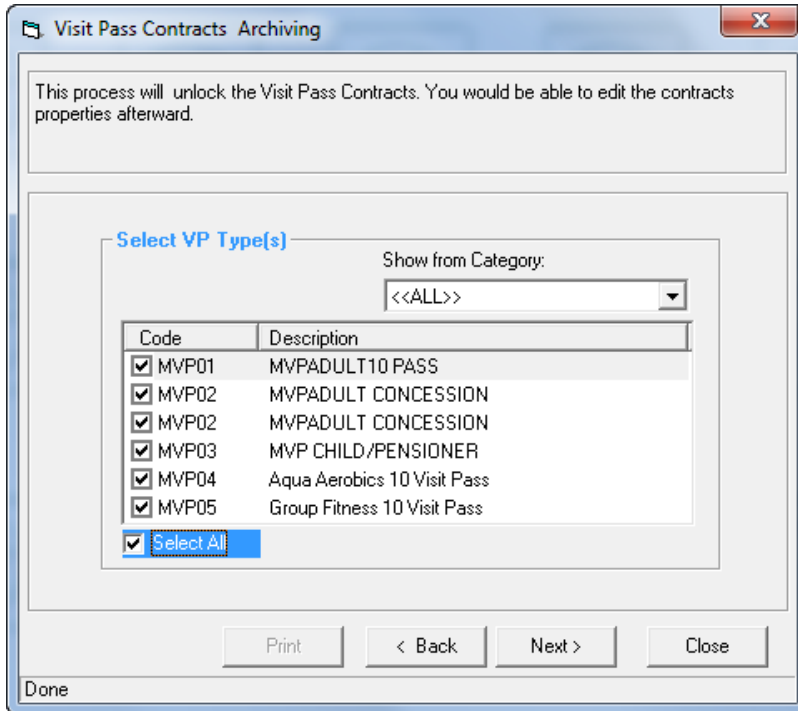
Contract ID

Type in a specific contract ID

Customer ID

Select a specific customer

2. Press the  button

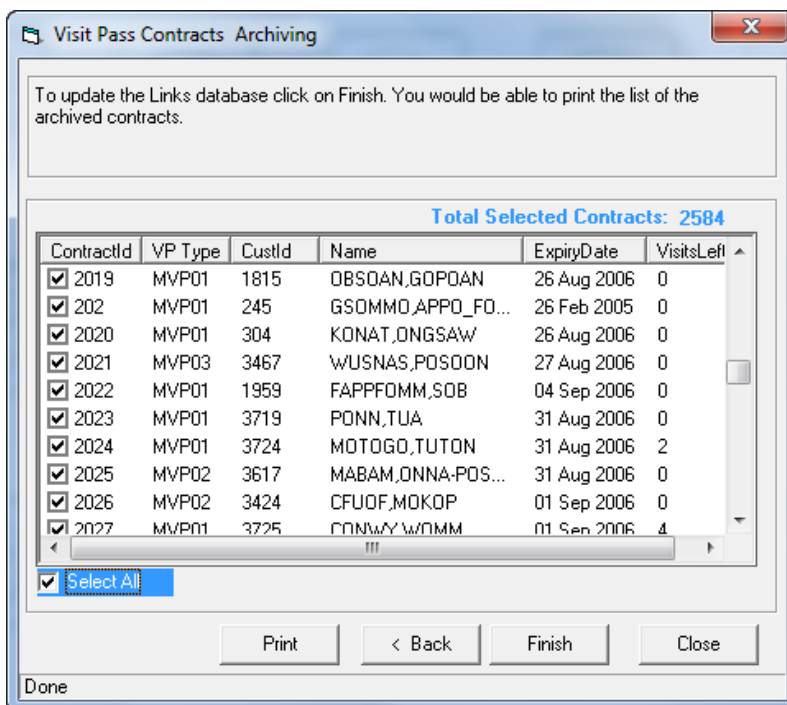


3. Select Visit Pass Types

Show from Category

Select a visit pass category to display the visit passes linked to the category and then select the visit passes to include in the process

4. Press the  button



Select All                      Select the customer or customers whose visit pass contracts are to be restored



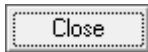
Press the Print button to print a list of the customers selected



Press the Back button to return to the previous screen



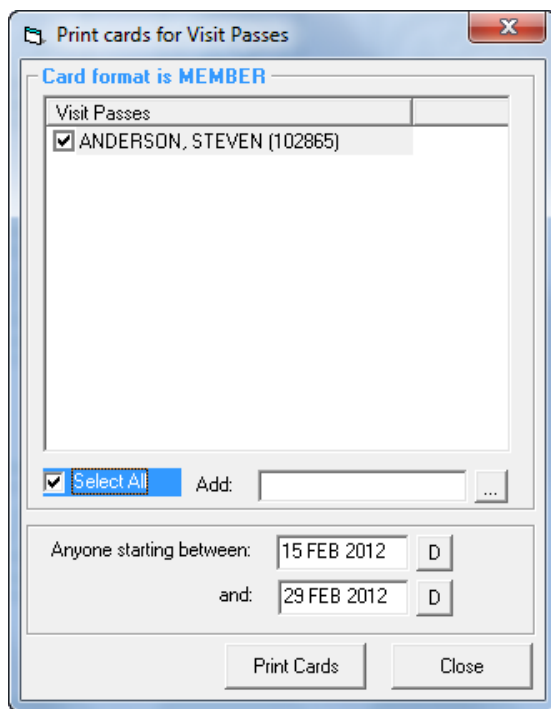
Press the Finish button to finalise the restoration process



Press the Close button to stop the restoration process

### Visit Pass Bulk Card Print

Admin > Memberships/VP > Visit Passes > Bulk Card Print



As a new Visit Pass customer is added to the system their name is included in the Bulk Bard Print system.

Tick the box to select a Customer for printing. Once the card is printed their name is removed from the list.

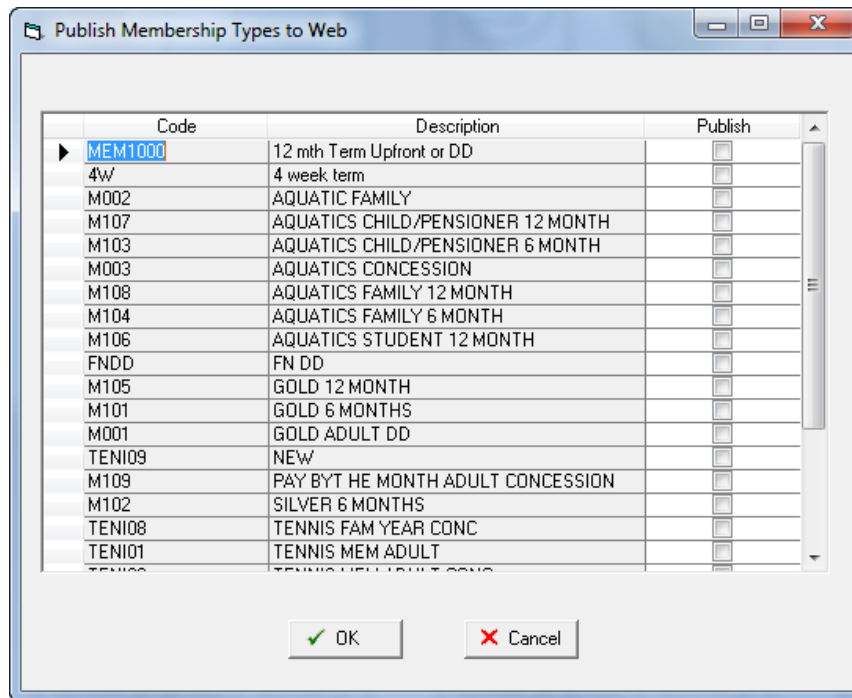
Alternatively a Customer can be added to the list by using the Add feature.

The card layout for the Visit Pass card is defined at Admin > Admin > Cards > Card Layout



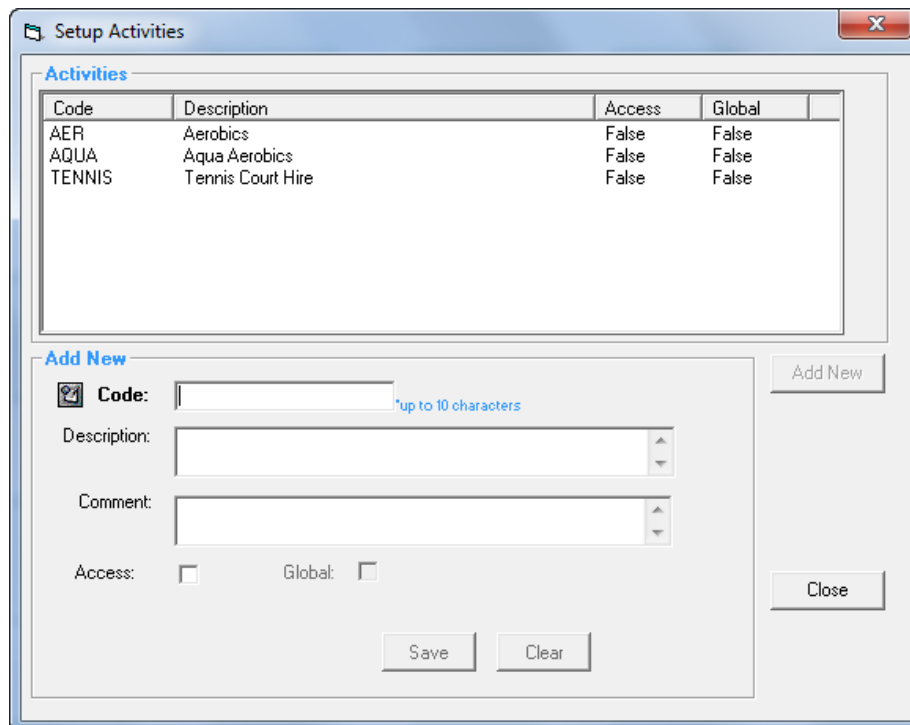
## Publish MemTypes to Web

Admin > Memberships/VP > Publish MemTypes to Web



## Activities

Admin > Memberships/VP > Activities




Activities can be allocated to memberships and visit passes. These activities are used as part of the Members Survey process that is integrated within the POS Module. When activated, upon recording a visit at the POS for all customers with memberships and visit passes, a dialog box will be displayed listing the activities allocated to the membership or visit pass. It is then possible to select the activities and save the information. An activities report can then be produced that displays what activities members and visit pass holders are utilising

Add New

<b>Code</b>	Enter a code to represent the new activity
<b>Description</b>	Type the full description of the activity
<b>Comment</b>	Type in a comment for the activity
<b>Access</b>	Tick the check box if the activity is to be used for access module
<b>Global</b>	Tick the check box if the activity is to be used across all locations in a multi location database

Edit an Activity

**Edit or Delete** Highlight the activity you wish to delete or edit. To delete, click the . If you want to edit the entry you will only be able to change the description

For more information on Activities, please refer to the Access 2 User Guide



## Admin > Direct Debit

For information regarding the Direct Debit setup, please see the "Understanding Direct Debit" manual.

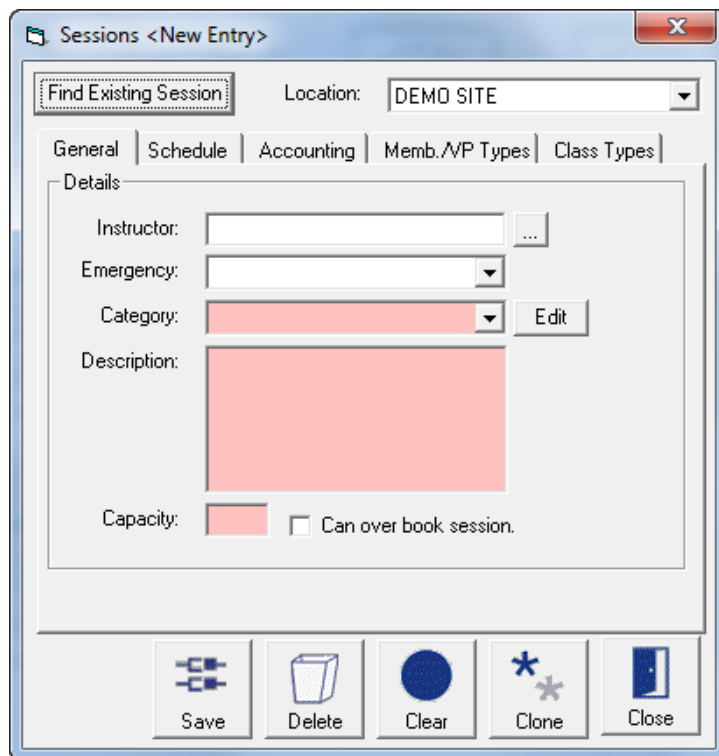
## Admin > Sessions

Links provides the opportunity to create a booking system for fitness classes. The booking system will allow members and casual clients to book into fitness classes whilst keeping track of class numbers and providing class tickets.

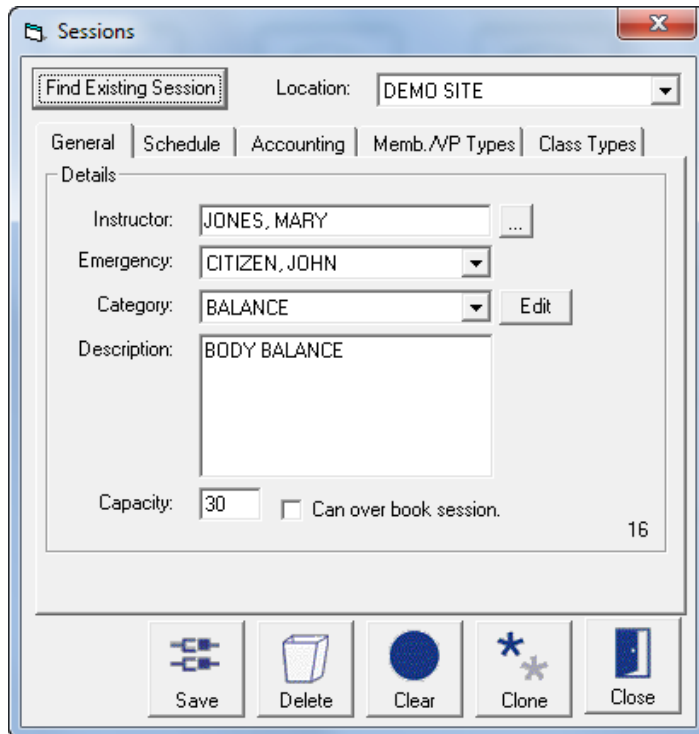
Each fitness class or "Session" will need to be setup and only those classes that are scheduled for the current day will be displayed at the Point of Sale screen.





### Setup Sessions

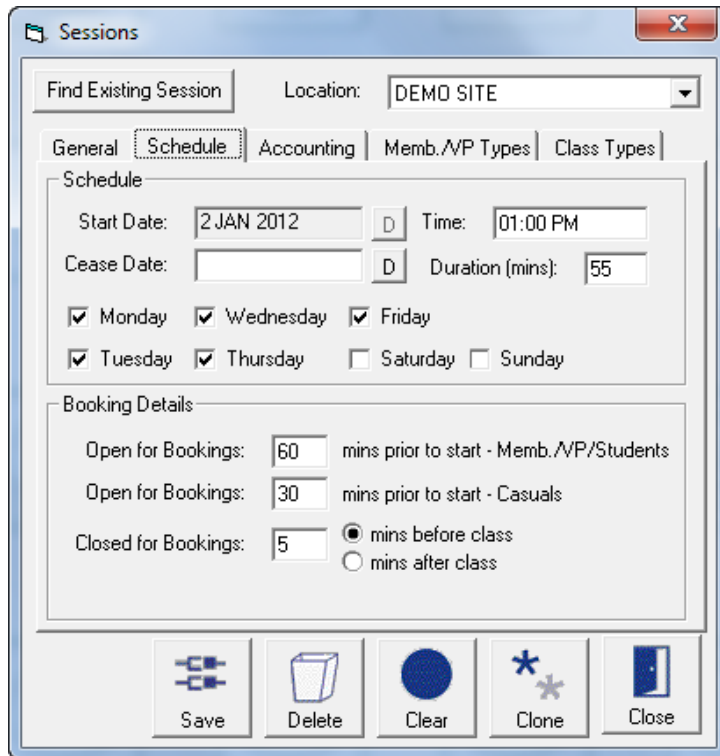
Admin > Sessions > Setup Sessions




Press this button to display then search screen to search for existing classes that have been previously created



- Instructor                      Using the  search button, select the instructor
  
- Emergency                      Using the  drop down button, select the emergency instructor
  
- Category                        Categories are used to group like session for reporting purposes. Using the  drop down button select the category that this session will be allocated to.  
  
    To create a new category press the  button and type in the new category in session category setup screen
  
- Description                    Type in the description of the session
  
- Capacity                        Type in the number of people who can attend the session
  
- Can Over Book Session      Select this box to allow the session to be over booked



## Schedule

Start Date                      Select the start date for this session

Cease Date                      The cease date should only be used if this session or sessions are no longer being used

Time                              Type in the start time of the session

Duration                        Type in the duration time, in minutes, of the session

Days                              Select the day or days that the session is offered

## Booking Details

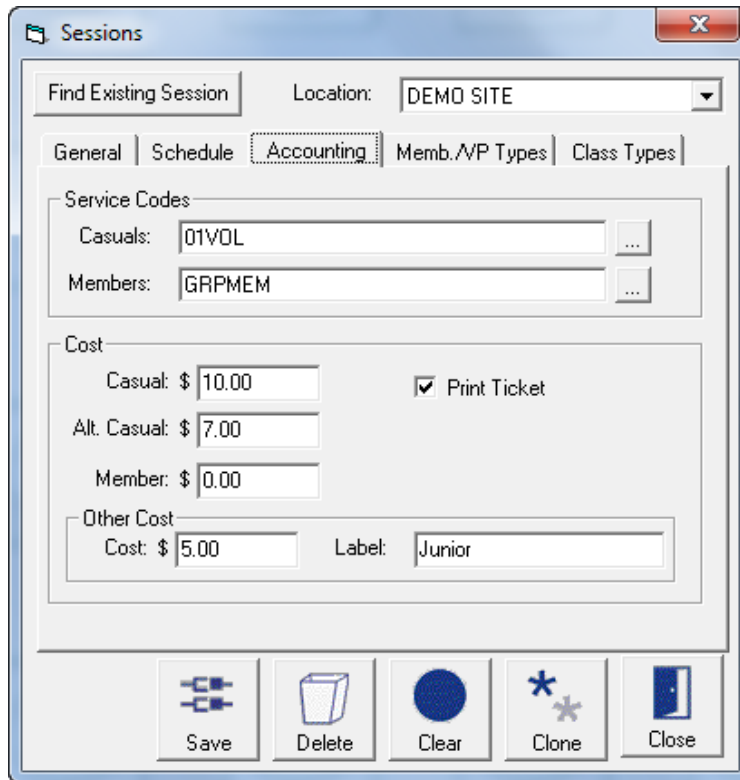
Open for Bookings...              Specify the minutes before the Session's Start time that  
Memb./VP/Students                  Memb./VP/Students can make a booking

Open for Bookings...              Specify the minutes before the Session's Start time that Casual users  
Casuals                                  can make a booking

Closed for Bookings


Enter the minutes before or after the Session Start time that the Session is closed for bookings

Admin > Sessions > Setup Sessions > Accounting




### Service Codes

Casuals

Using the  search button select the service code to which the casual fee will be assigned.

Members

Using the  search button select the service code to which the members fee, if any, will be assigned

Note: Service codes must be assigned to both casuals and members

### Cost

Casual

Type in the Casual fee for the session

Members

Type in the Member's fee for the session

Alt Casual

Type in an alternative casual fee (concession fee) for the session. The money will be allocated to the casual service code

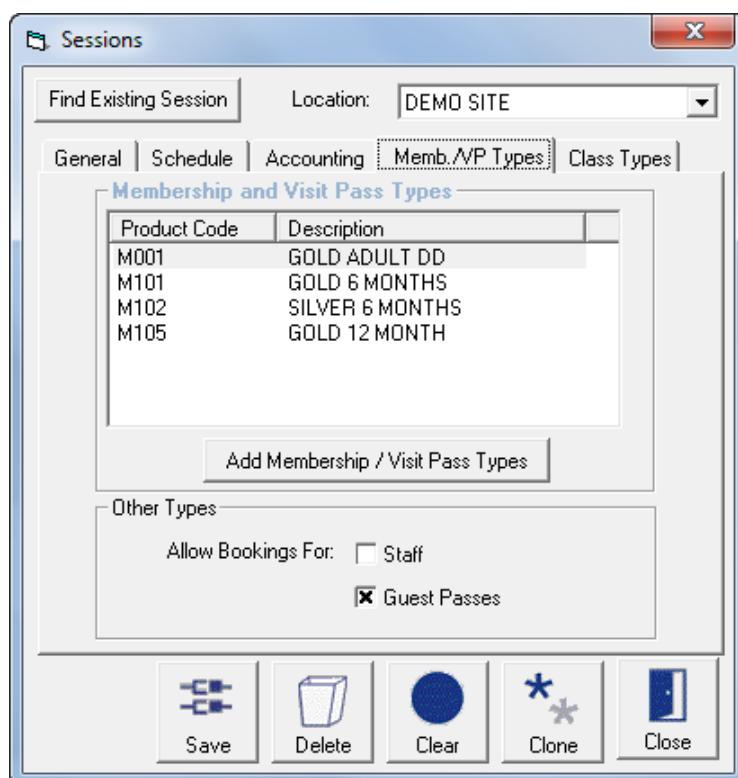
Print Ticket

Select this box if you wish a ticket to be printed when processing a session booking for casuals and members. This ticket will be produced on the POS receipt printer and will display the session description, date, teacher and start time

Other cost

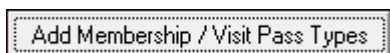
Type in any other fee for the session and customise the label

Admin > Sessions > Setup Sessions > Memb/VP Types



Membership and Visit Pass Types

Displayed are the Membership and Visit Pass Types which entitle holders to the Member's fee for this session, and enables bookings to be made during the period specified for Memb./VP/Students.



Click to search Membership / Visit Pass Types to add to the displayed list

Other Types

Allow bookings for Staff

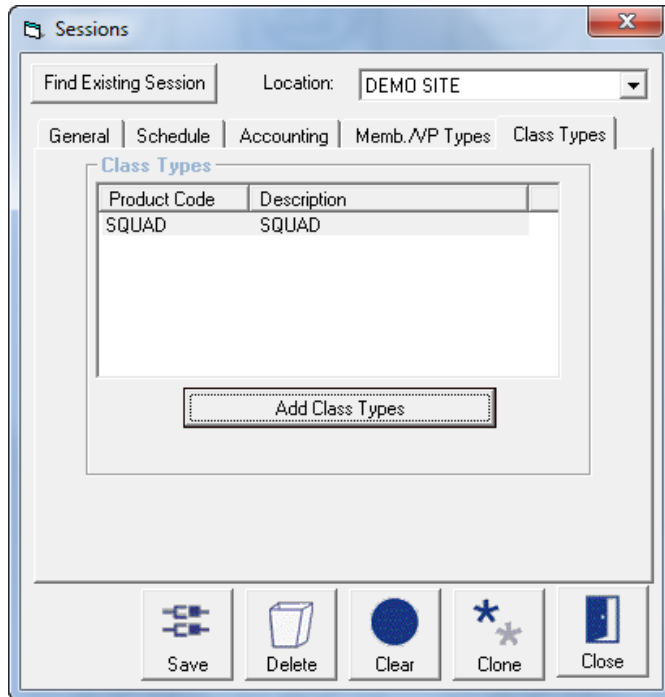
Click to enable Staff to have Members entitlements for this session – fee and “Open for bookings” period



Allow bookings for Guest Passes

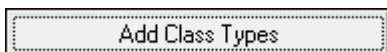
Click to enable Guest Pass holders to have Members entitlements for this session – fee and “Open for bookings” period

Admin > Sessions > Setup Sessions > Class Types



### Class Types

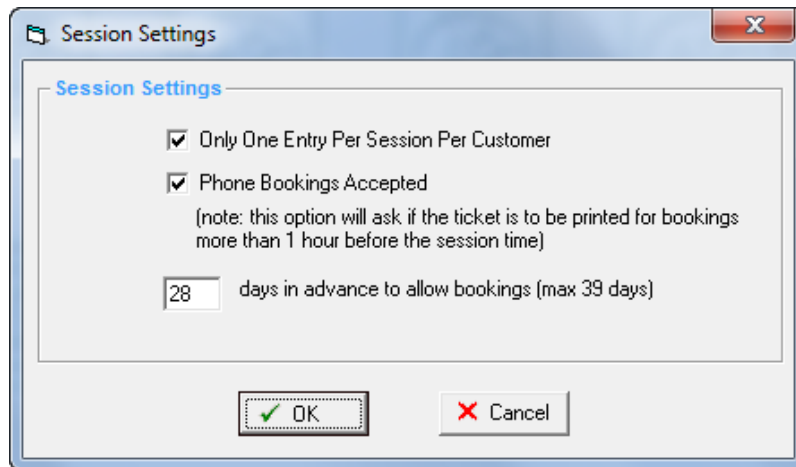
Displayed are the Class Types which entitle Student's to the Member's fee for this Session, and enables bookings to be made during the period specified for Memb./VP/Students.



Click to search Class Types to add to the displayed list

## Session Settings

Admin > Sessions > Session Settings



Only one entry per session per Customer

Will not allow more than one booking to be made for each customer for that Session

Phone Bookings Accepted

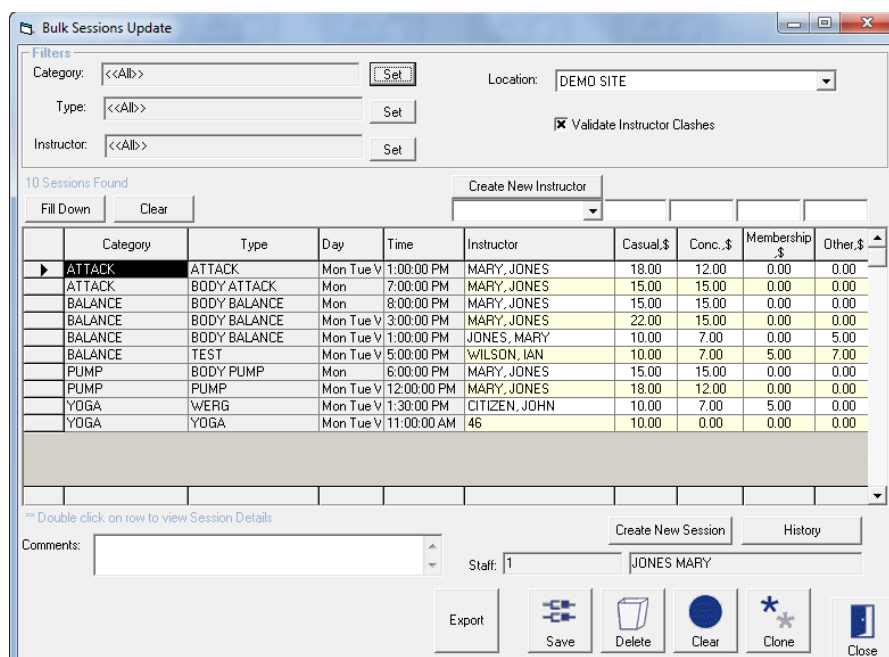
This option will ask if the ticket is to be printed for bookings more than one hour before the session time

...days in advance to allow bookings

Specify the number of days in advance to allow Sessions bookings

## Bulk Sessions Update

Admin > Sessions > Bulk Sessions Update



The Bulk Sessions Update Screen allows multiple Sessions to be updated with new instructors and prices.

Filters

Category Select sessions of specific Categories to update – as defined in Session Setup

Type Select Sessions by their Description

Instructor Select the instructor assigned to the Sessions

Location Specify which Location's Sessions to update

Validate Instructor Clashes Will give a warning when the Instructor already has Sessions at the same Date/Time

11 Sessions Found

Fill Down Clear Create New Instructor

	Category	Type	Day	Time	Instructor	Casual,\$	Conc.,\$	Membership,\$	Other,\$
▶	ATTACK	ATTACK	Mon Tue V	1:00:00 PM	MARY, JONES	18.00	12.00	0.00	0.00
	ATTACK	BODY ATTACK	Mon	7:00:00 PM	MARY, JONES	15.00	15.00	0.00	0.00
	BALANCE	BODY ATTACK	Mon	7:00:00 PM	JONES, MARY	0.00	0.00	0.00	0.00
	BALANCE	BODY BALANCE	Mon	8:00:00 PM	MARY, JONES	15.00	15.00	0.00	0.00
	BALANCE	BODY BALANCE	Mon Tue V	3:00:00 PM	MARY, JONES	22.00	15.00	0.00	0.00
	BALANCE	BODY BALANCE	Mon Tue V	1:00:00 PM	JONES, MARY	10.00	7.00	0.00	5.00

To update the selected Sessions

1. Fill in the required fields in the boxes above Instructor and the relevant Cost fields

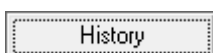
 - will open the Staff Setup screen

2. Click  to update, or  to erase

Note: Bulk Sessions update will make changes to all Sessions shown, be sure to scroll down and confirm that all sessions are to be updated before click Fill Down.



Will open the Sessions Setup screen



Opens a Log of all Sessions Bulk Processes including the date and time, and Staff ID who made the changes

Comments

Fill in any comments relevant to the changes, viewed by double clicking on a log entry under History

## Admin > Messages

The Messages screens provide the ability to create messages for customers regardless of their status within the system.

Generally there are two functions within messaging.

One is to create the message, whether it is a bulk message or a message to a particular customer. Messages can be sent in two formats; internal messages that are activated when the customer's card is scanned at point of sale and e-mails which are sent to the customer's e-mail address. It is also possible to create and sent both forms of messages at the same time.

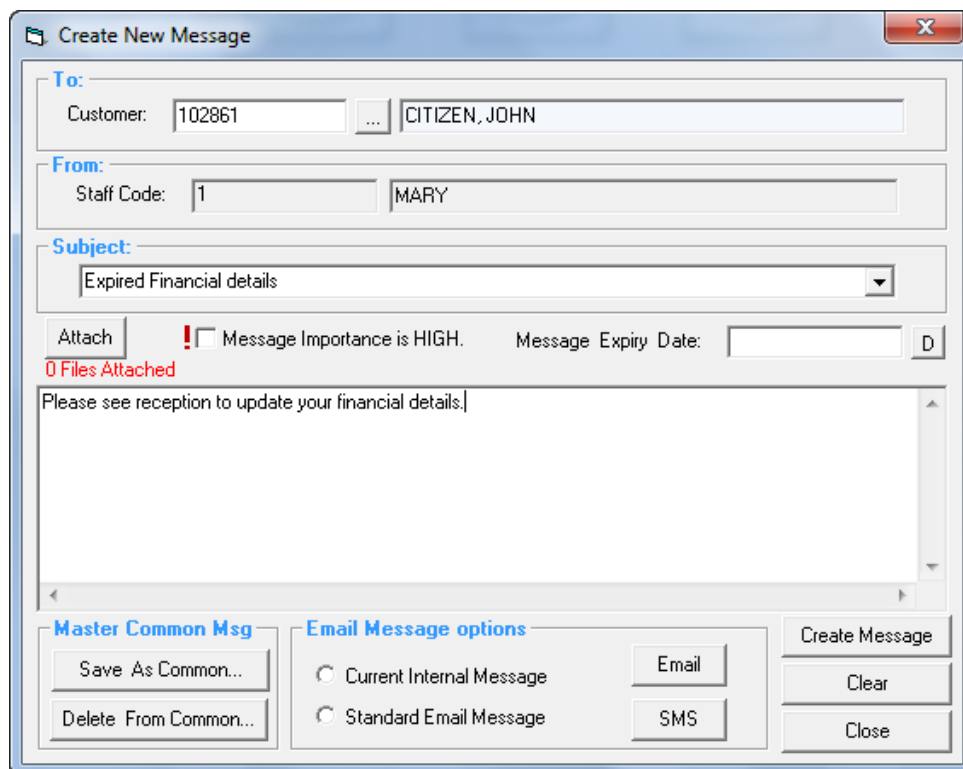
Second is to view the message. In the case of bulk messages it is possible to view historical messages whilst staff messages can only be viewed after logging in using individual staff ID and password.

To create the message there are three basic requirements

- The Customer ID (whether it be staff person or member)
- The subject
- The message itself

### New Message

Admin > Messages > Customer > New Message



**Create New Message**

**To:**  
Customer: 102861 ... CITIZEN, JOHN

**From:**  
Staff Code: 1 MARY

**Subject:**  
Expired Financial details

Attach  Message Importance is HIGH. Message Expiry Date: [ ] D





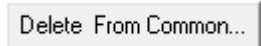
0 Files Attached

Please see reception to update your financial details.

**Master Common Msg**  
Save As Common...  
Delete From Common...

**Email Message options**  
 Current Internal Message  
 Standard Email Message

Email  
SMS  
Create Message  
Clear  
Close

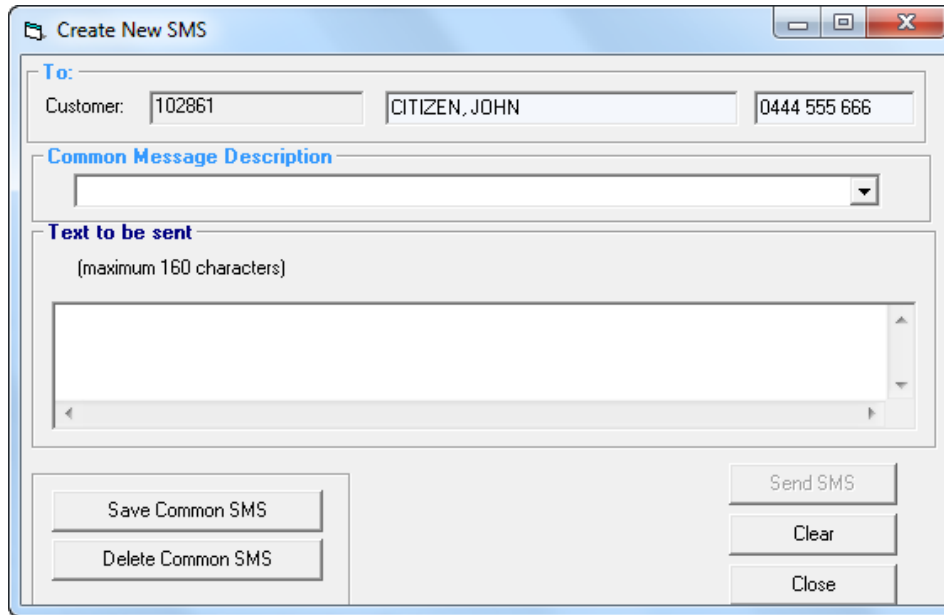
Customer	Use the  search button search for a customer or type in the customer number
Staff Code	The staff code and staff name will be displayed. This is derived from the staff member who is currently logged into Links
Subject	Using the  drop down button select from common subjects (inclusive of message) that have previously been saved. Alternatively type in a new subject description
Message Importance	Flag this box to designate that the message has a high importance. (Optional)
Message Expiry Date	Type in an expiry date for the message if required. (Optional)
Message Box	Type in the message
	Press this button to post the message
Master Common Message	
	Press this button if you wish to save this subject description and corresponding message as a common message that can be recalled at a later date.
	Press this button if you delete the displayed common subject description and corresponding message from the common list
Email Message Options	
Current Internal Message	Flag this option if the (internal) message created is also going to be e-mailed to the customer.
Standard Email Message	Flag this option if a different e-mail message is to be e-mailed to the customer whilst still posting the (internal) message created. It will be possible to also select from a list of common or standard e-mail messages.
None	This is the default position when entering the message screen. Use this setting if you wish to create an e-mail using the customers e-mail address but the message is typed within Microsoft Outlook.

Email

Press this button to generate the e-mails

SMS

Press this button to send an SMS to the specified customer. The following screen will open



The screenshot shows a window titled "Create New SMS" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains the following elements:

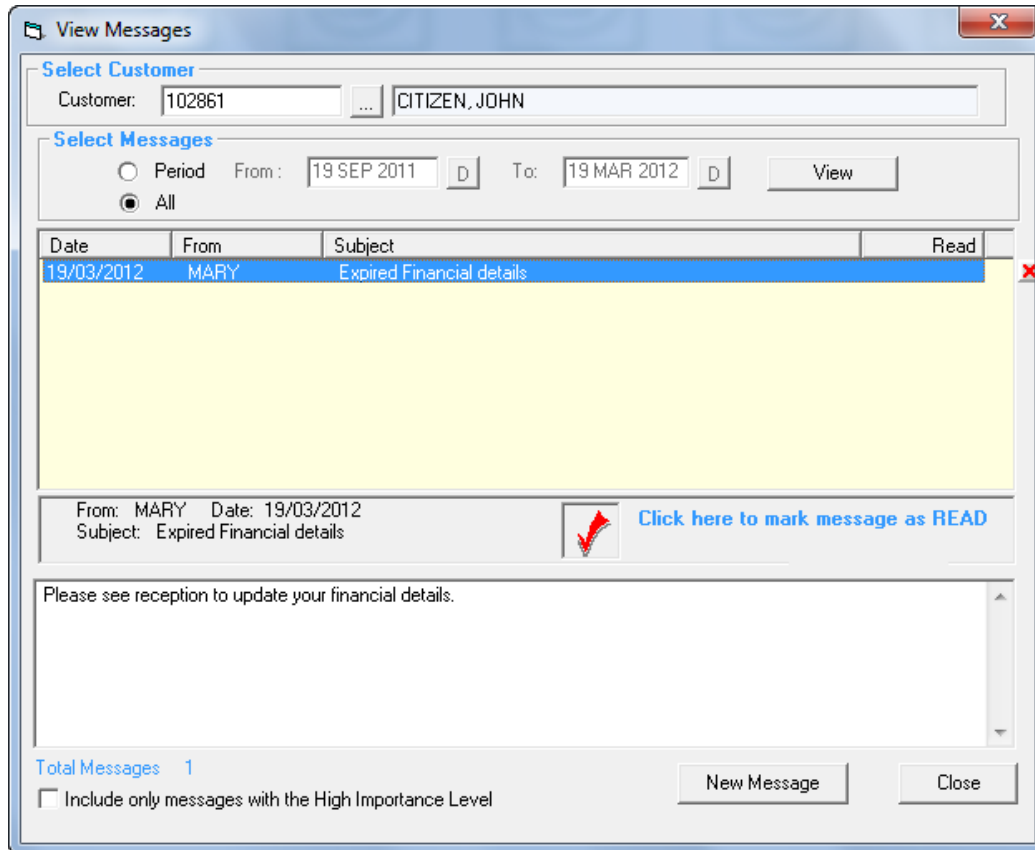
- To:** A section with three input fields: "Customer:" containing "102861", a name field containing "CITIZEN, JOHN", and a phone number field containing "0444 555 666".
- Common Message Description:** A dropdown menu.
- Text to be sent:** A text area with a label "(maximum 160 characters)".
- Buttons:** A group of buttons at the bottom: "Save Common SMS", "Delete Common SMS", "Send SMS", "Clear", and "Close".

Note: The functionality of the Create New SMS screen mirrors that of the Create Internal Message screen.

## View Customer Message

Admin > Messages > Customer > View Customer Message

This screen enables you to view any customer messages that have been generated and the message details.

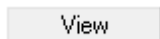


Customer Use the  search button search for a customer or type in the customer number

Select Messages

Period Enter in the From and To dates to select messages that were generated in a specific period

All Select all messages generated

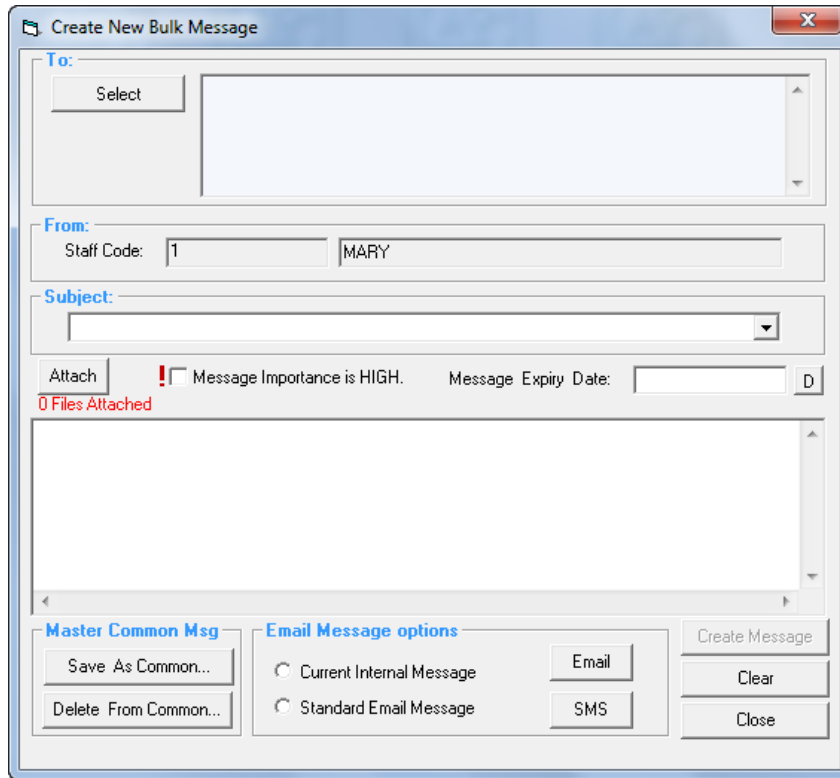
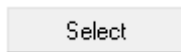


Press this button to select the messages based on the selection criteria

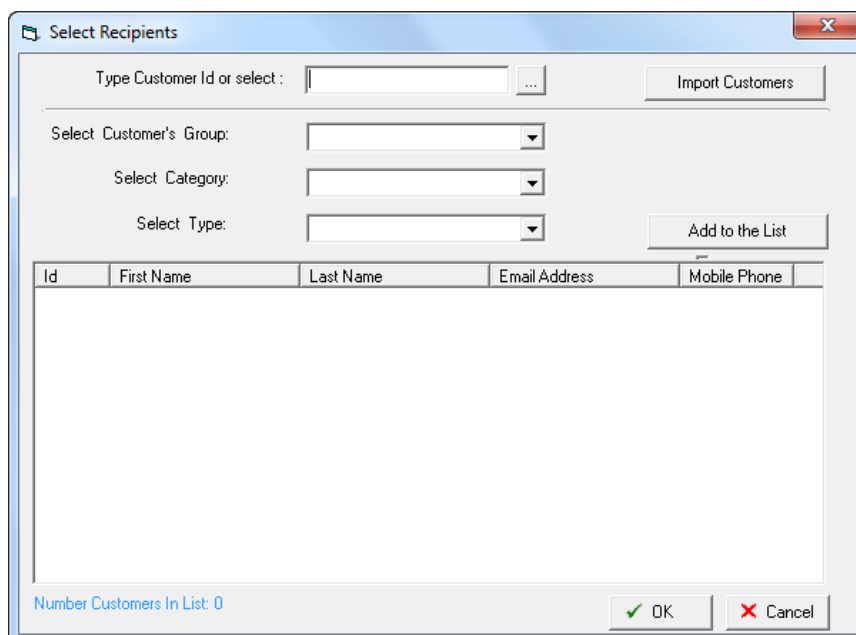
## New Bulk Message

Admin > Messages > Bulk > New Bulk Message

The New Bulk Message screen allows you to create and send a message to a large number of customers.


Press the Select button to open the following screen




Id	First Name	Last Name	Email Address	Mobile Phone




Type Customer ID or  
select

Use the  search button search for a customer or type in the customer number. More than 1 customer can be selected


 Import Customers

A list of customers can be imported from a .CSV file (Excel document). The Customer ID numbers must be in the first column of the Excel document


Select Customer's Group

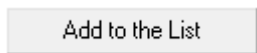
Using the  drop down button select from 3 main contract groups; Memberships, Visit Passes and Students

Select Category

If you have selected a customer group, it is possible to further narrow the selection through selecting by category. Using the  drop down button, select from the categories that relate to the chosen group

Select Type

If you have selected a category, it is possible to further narrow the selection through selecting by type. Using the  drop down button select from the types that relate to the category chosen

 Add to the List

Press this button to select the customers that fulfil the selection criteria as stated above

 OK

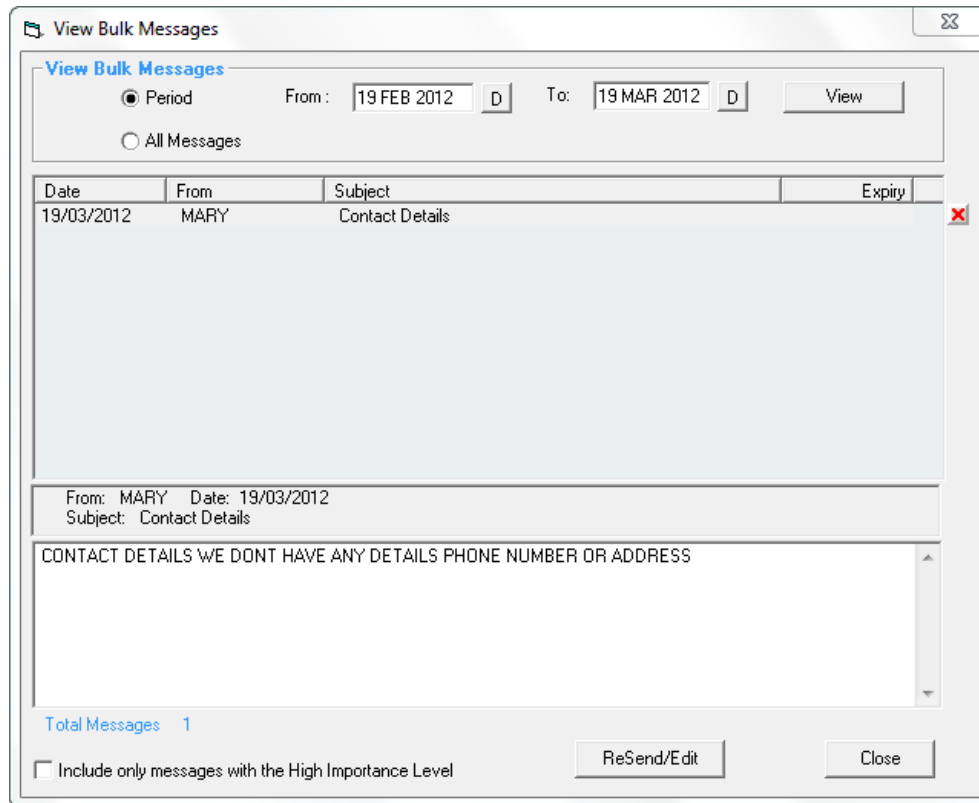
Once you have complied the list as required. Click OK to return to the Create Bulk Message Screen

The creation of the message and functions is the same as the Create Internal Message screen.

## View Bulk Message

Admin > Messages > Bulk > View Bulk Message

You can view any bulk messages that have been generated and the message details.



**View Bulk Messages**

**View Bulk Messages**

Period      From: 19 FEB 2012    To: 19 MAR 2012    View

All Messages

Date	From	Subject	Expiry
19/03/2012	MARY	Contact Details	

From: MARY    Date: 19/03/2012  
 Subject: Contact Details

CONTACT DETAILS WE DONT HAVE ANY DETAILS PHONE NUMBER OR ADDRESS

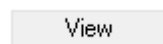
Total Messages 1

Include only messages with the High Importance Level    ReSend/Edit    Close

### Select Messages

**Period**      Enter in the From and To dates to select messages that were generated in a specific period

**All**      Select all messages generated

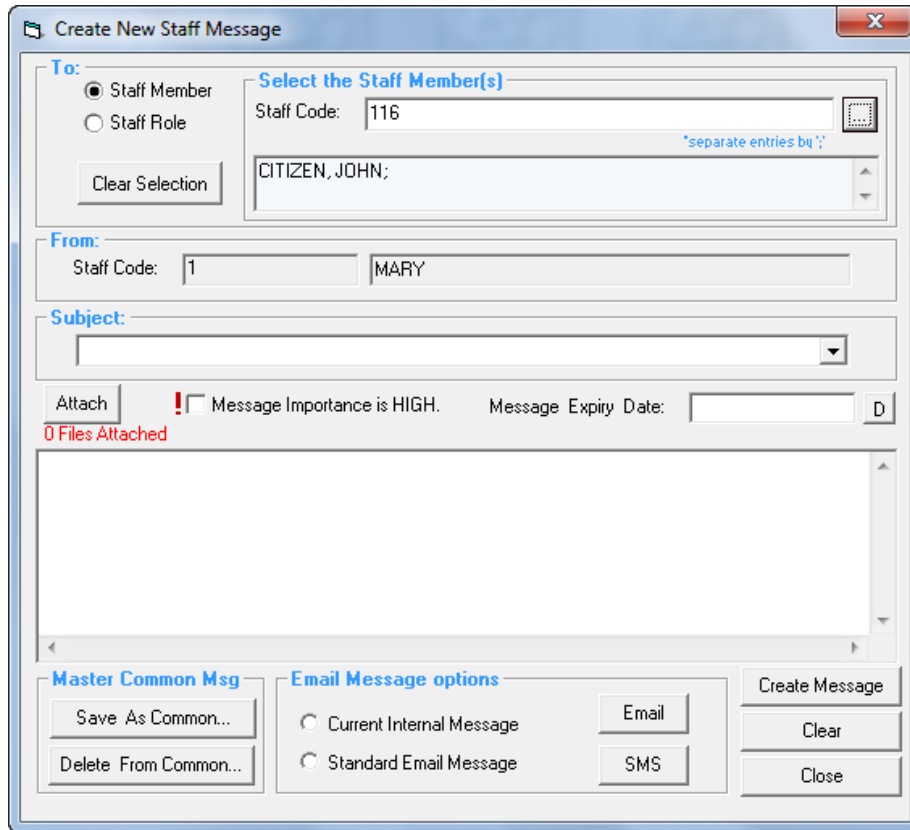


Press this button to select the messages based on the selection criteria


## New Staff Message

Admin > Messages > Staff > New Staff Message


Messages can be created and sent to staff members utilising either their Staff ID or by specific roles.

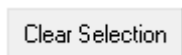


Staff Member

Use the  to search and select staff members. Alternatively, type in the staff ID and separate multiple ID's by the ; symbol

Staff Role

Use the  to search and select from a list of Staff Roles. Any staff member that is allocated to this role will receive the message



Press this button to clear the selection and recommence the selection process

Staff Code

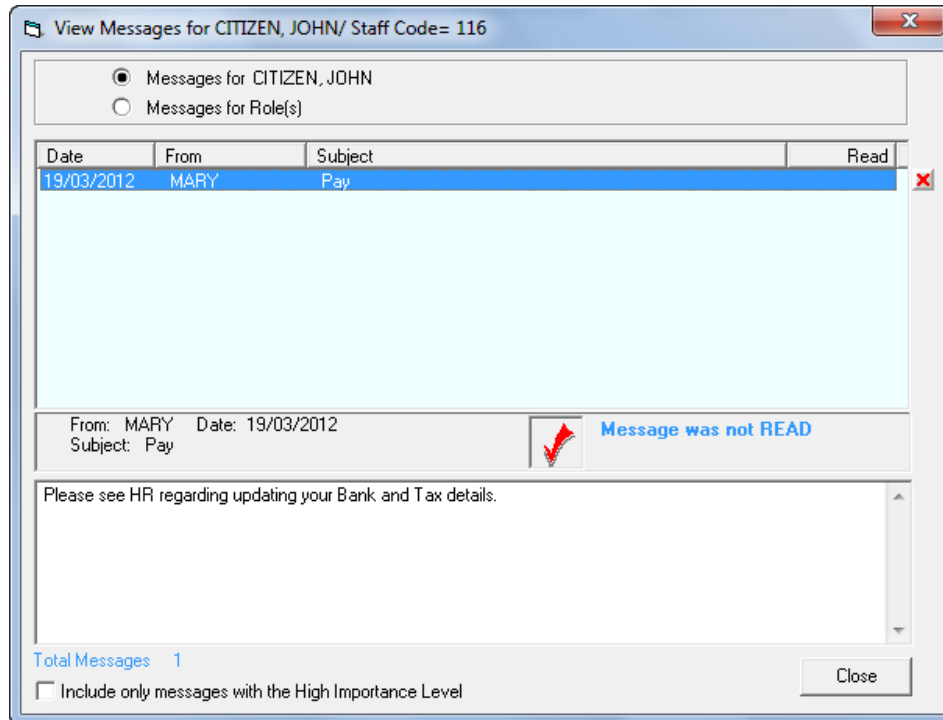
The staff code and staff name will be displayed. This is derived from the staff member who is currently logged into Links

The creation of the message and functions is the same as the Create Internal Message screen.

## View Staff Messages

Admin > Messages > Staff > View Staff Messages

Before gaining access to this screen all staff members must log in using their Staff ID and Password



This screen enables you to view designated staff messages that have been generated. It is also possible to view any message designated to the staff member's Role

## View Messages for Roles

Admin > Messages > Staff > View Messages for Roles

Much like the View Staff Messages screen, this screen displays all messages that have been created and sent to Staff Role.

