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Classes Overview

The Classes Module is designed to manage student bookings for all program based activities and services that have a teacher/student relationship.

Traditionally used for swim school bookings; the Classes Module provides all the functionalities required to manage class scheduling for gymnastics, karate, dance, pilates and yoga courses, as well as multi choice enrolment programs such as holiday intensive program, school camps, and training courses.

It has the capacity to accept multiple payment options whether it is for daily, monthly, term or yearly scheduling.

The Classes Module can also track makeup lessons, cancellations, suspensions, student attendances, occupancy levels, waiting lists and provide full financial details for every booking made.

The system generated reports have a wide range of functions and will produce class sheets, attendance records, financial accounts and much more.

All students that are booked into classes will be allocated an identification number and are also required to have a responsible person account set up and linked to the student/s. Normally the responsible person would be the student's guardian or in the case of the student being the adult the responsible person will also be the adult. The responsible person account is designed to record the student/s financial information associated with the class booking/s. A responsible person account can have multiple students attached to it.

All class bookings are date sensitive therefore it is possible to view and track the status of class bookings on a day to day, week to week, month to month, or year to year basis.

'Students' and 'Responsible Person' are also referred to as 'Customers' throughout this document.

Understanding the Visual Scheduler

Classes> Classes> Visual Scheduler

The Visual Scheduler window is the most important screen within the Classes Module as it allows for a wide range of functions and actions. These include;

- Visual display of all classes that have been setup
- Create student bookings, including perpetual and term and once off casual, trial and make up bookings
- Move existing student bookings
- Cancel student bookings
- Suspend student bookings
- Search for vacancies utilising several filter options
- Display additional class details such as enrolments and vacancies
- Show individual class details including area, level and teacher
- View student details
- Mark student skills against their booking
- View student class progression
- Print vacancies displayed on the screen to a selected printer
- Email vacancies displayed on the screen to a selected recipient

Opening the Visual Scheduler

To open the Visual Scheduler from the Home screen:

1. From the home screen; hover mouse over the 'Classes' option
2. From list on right hand side click 'Visual Scheduler' to open
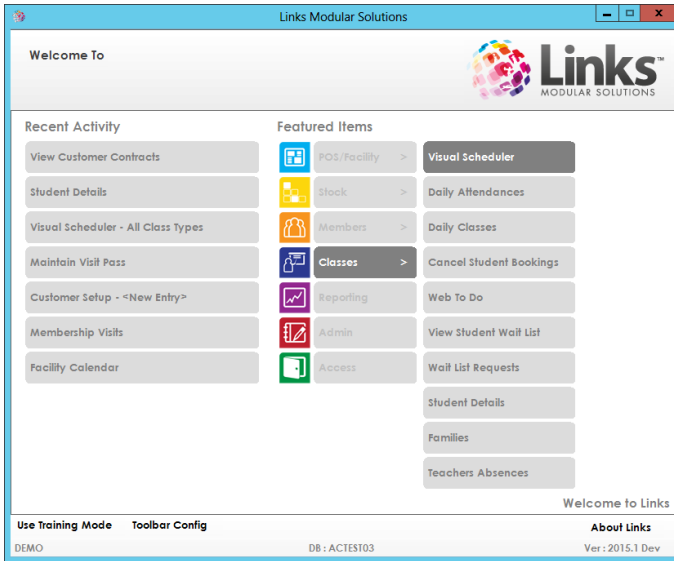
-OR-

To open the Visual Scheduler from within the POS Module:

1. From POS Module, select the [Visual Scheduler] function button

   Note: This button has the ability to be renamed, therefore it may be called something different at your facility i.e. Learn to Swim Bookings.
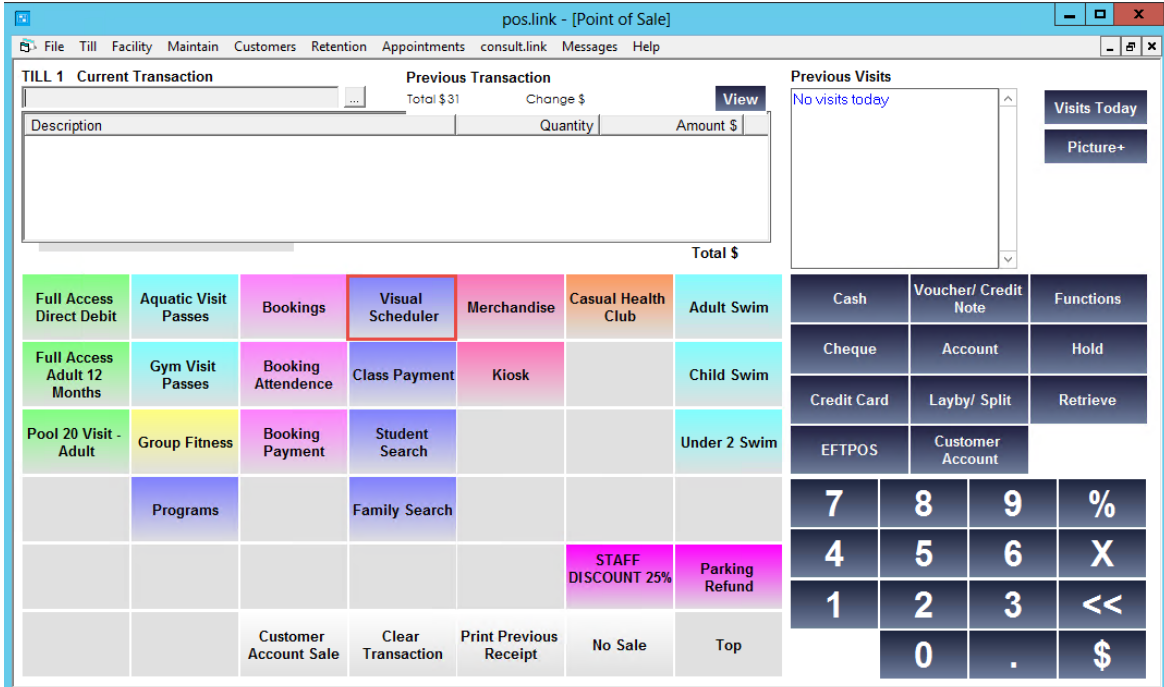
The Visual Scheduler can be reopened if closed at any time directly from the Classes Module, by selecting 'Visual Scheduler' from the 'Classes' drop down menu.
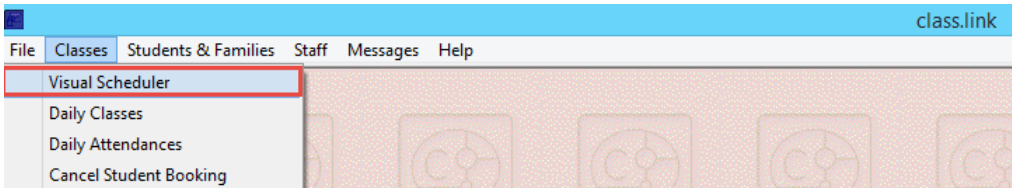
Overview of the Visual Scheduler

Once opened, the Visual Scheduler will look similar to the one shown in the example below:
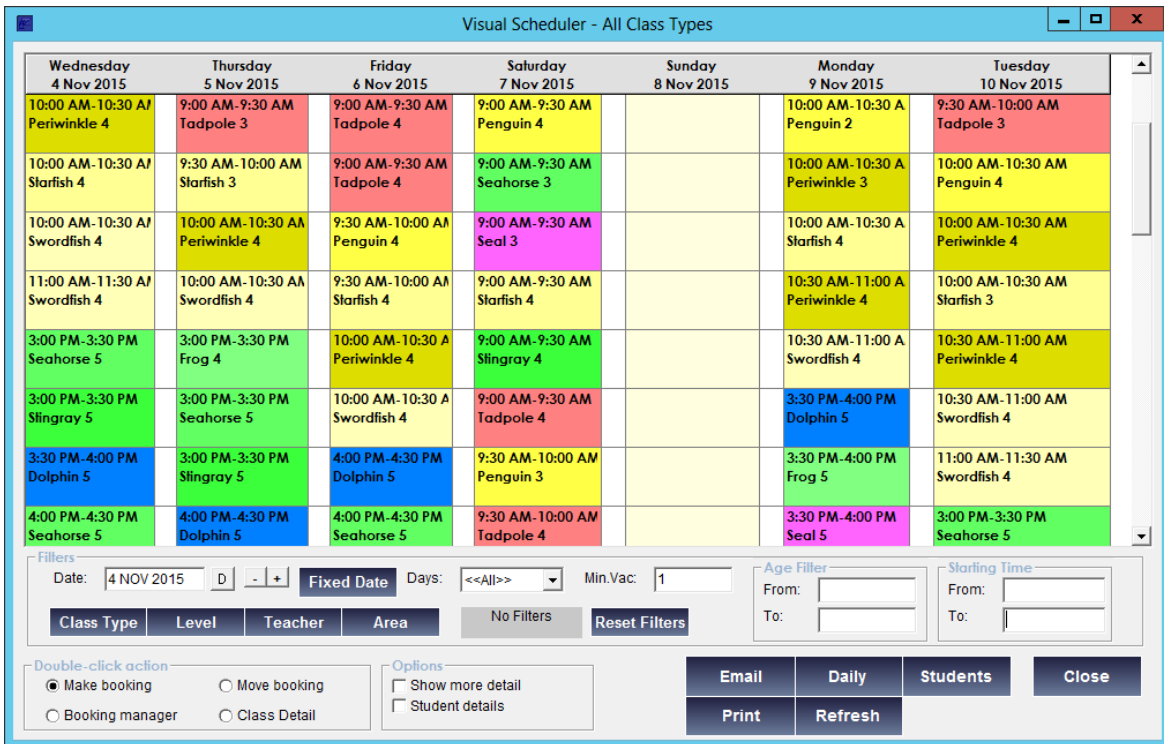
Class Details

Below is the default view for an individual class when the Visual Scheduler has been opened.
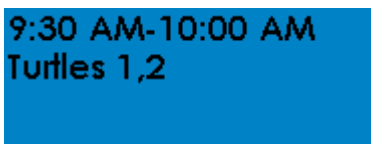
This view displays the following information:
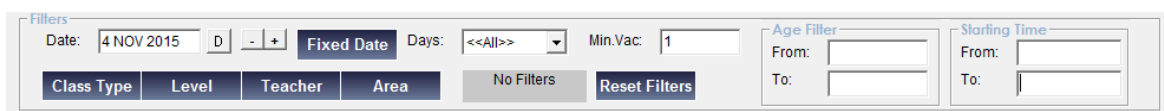
- **Time of the Class** - Class starts at 9:30am and finishes at 10:00am
- **Level of the Class** - Class Level is Turtles. The colour also denotes the Level

- **Permanent Vacancies** - The number '1' denotes that there is one permanent vacancy
- **Vacancies for the Day*** - The number '2' denotes there are two positions vacant for that date (meaning that there must be one absence notified)

Vacancies for the day will only be displayed if you have requested to include make ups, suspensions, held and trial bookingsin the vacancy calculation. This setting can be altered trough Admin> Site> Site Setup> Classes Tab.

Filters

Filters provide the ability to search and find specific classes or attributes of a particular class.
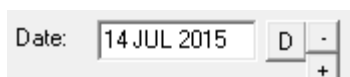
You can search for classes by using one or several of the following filters:

- Class Type
- Level
- Teacher
- Area
- Day of the Week
- Minimum Vacancy
- Average Age of the Class
- Starting Time

How to use the above filters has been described below.

Date Filter

Upon opening the Visual Scheduler Links with automatically default to the current days date. To change the date, click on the [D] button to make your date selection. Links will automatically display a week of classes starting with the date chosen in the first column. You can also type the desired date into the field.

There is also the option of increasing or decreasing the date in increments of one week. Depress the [-] or [+] to go forward or back by one week (seven days) at a time.

[Fixed Date] Button: In the Admin Module>Classes> Class Settings you can set a particular date that when the [Fixed Date] button is clicked will automatically take you to the date listed. For example, placing the start date for next term reduces errors of staff not knowing when next term starts. Once the fixed date has past the button will become inactive (displays as grey) until a new date is entered.

Days Filter

The Visual Scheduler can be filtered by each day of the week. To filter by day, select the relevant day from the drop down menu.

Minimum Vacancy Filter

It is possible to search by the number of vacancies that are left in a class. Type in the minimum number of vacancies a class must have to be displayed in the Visual Scheduler.

A default minimum vacancy of one can be set through Admin Module> Classes> Class Settings.

Age Filter

The age filter narrows down the search by the average age of students in the class. Type in 'From: 5' and 'To: 6', to show classes with an average age of students between 5 and 6.

Note: Classes without students (or without an average age) will also be shown on the Visual Scheduler.

Starting Time Filter

There is the option of making a selection based on class start times. Type in 'From: 9:30AM' and 'To: 10:00AM' to display the range of classes with start times between 9:30AM and 10:00AM.

Note: Time fields can take up to 4 numeric characters and accept either 'A', 'AM', 'P', or 'PM'.

If you do not enter 'AM' or 'PM' the system will automatically assume 'AM'. For example, for the above, 930 and 10 were entered. 930a and 10a would have also worked.

Using the 24 hour clock can speed up entry. For example, for 3:30PM to 4:30PM enter 1530 and 1630.

Filter Button Options:

- **[Class Type]:** Class Type defines the parameters for all individual classes attached to the Class Type. For more information regarding Class Types please refer to the Admin User Guide.
- **[Level]:**Levels refer to the name of the class/es that the facility offers. For more information regarding Levels please refer to the Admin User Guide.
- **[Area]:**Areas are used to differentiate areas within the facility in which classes are held. For more information regarding Areas please refer to the Admin User Guide.
- **[Teacher]:** Teacher refers to the staff member running the class. For more information regarding Teachers please refer to the Admin User Guide.
- **[Reset Filters]:** removes all filters applied to the 'Visual Scheduler' ready to apply new filters as required

Using the Class Type Filter

1. Select the [Class Type] button, the following window will then be displayed:
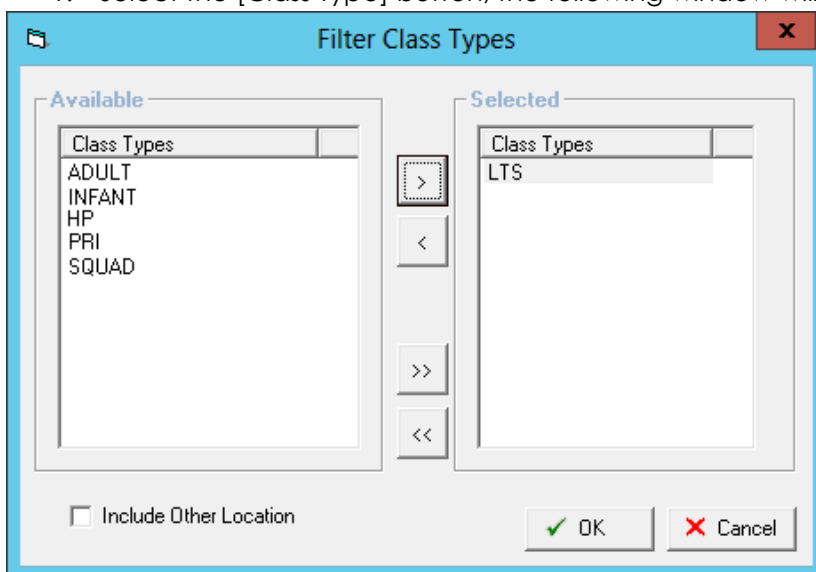
2. Narrow your selection to the desired Class Type/s,by clicking on a Class Type from the left hand column to highlight, and depress the [>] button. Alternatively, double click to move the Class Type to the 'Selected' list on the right hand side.
   Repeat the above process until all desired Class Type/s have been brought across. To move all Class Types depress the [>>] button.
   Note: If you are a multi-locationdatabase you will have the option to tick 'Include Other Locations' to be able to select Class Type/s from another location.
3. Select [OK]
4. The Visual Scheduler will then be refreshed to display the desired Class Type/s and all corresponding classes

Using the Level Filter

1. Select the [Level] button, the following window will then be displayed:
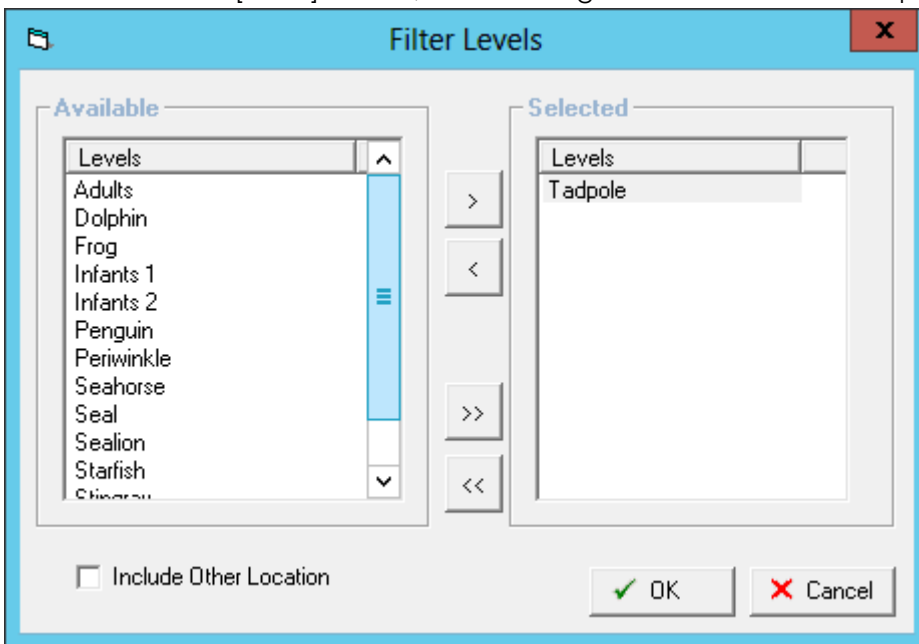
2. From this window you can narrow your selection to the desired level/s
3. Narrow your selection to the desired level/s, by clicking on the level in the left hand column to highlight, and depress the [>] button. Alternatively, double click to move the level to the 'Selected' list on the right hand side.
   Repeat the above process until all desired level/s have been brought across.
   To move all levels depress the [>>] button.
   Note: If you are a multi-location database you will have the option to tick 'Include Other Locations' to be able to select the other location's levels.
4. Select [OK]
5. *The Visual Scheduler will then be refreshed to display the desired level/s and all corresponding classes*

Using the Area Filter

1. Select the [Area] button, the following window will then be displayed:

2. Narrow your selection to the desiredarea/s, by clicking on the area in the left hand column to highlight, and depress the [>] button. Alternatively, double click to move the area to the 'Selected' list on the right hand side.
   Repeat the above process until all desired area/s have been brought across.
   To move all areas depress the [>>] button.
   Note: If you are a multi-location database you will have the option to tick 'Include Other Locations' to be able to select the other location'sareas.
3. Select [OK]
4. The Visual Scheduler will then be refreshed to display the desired area/s and all corresponding classes
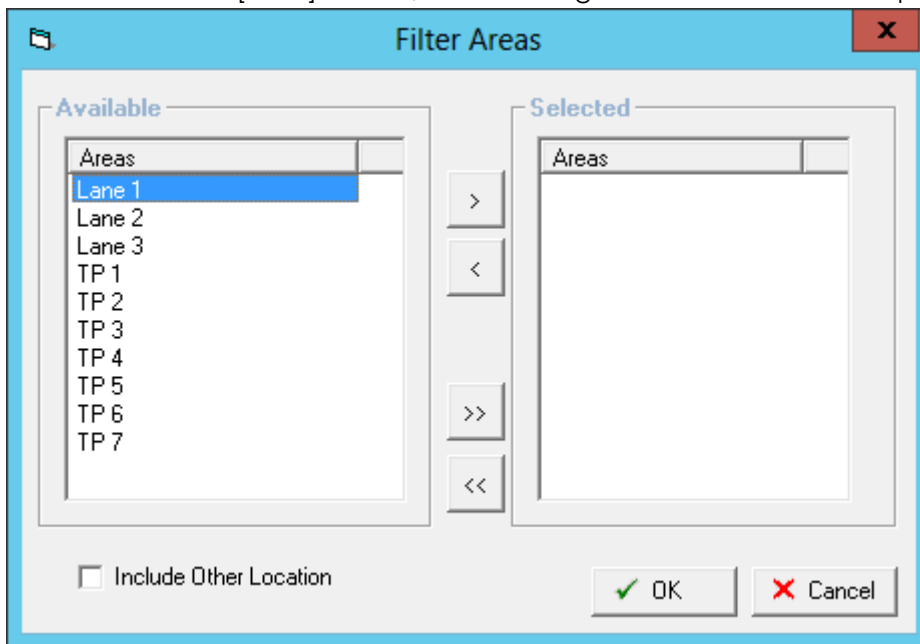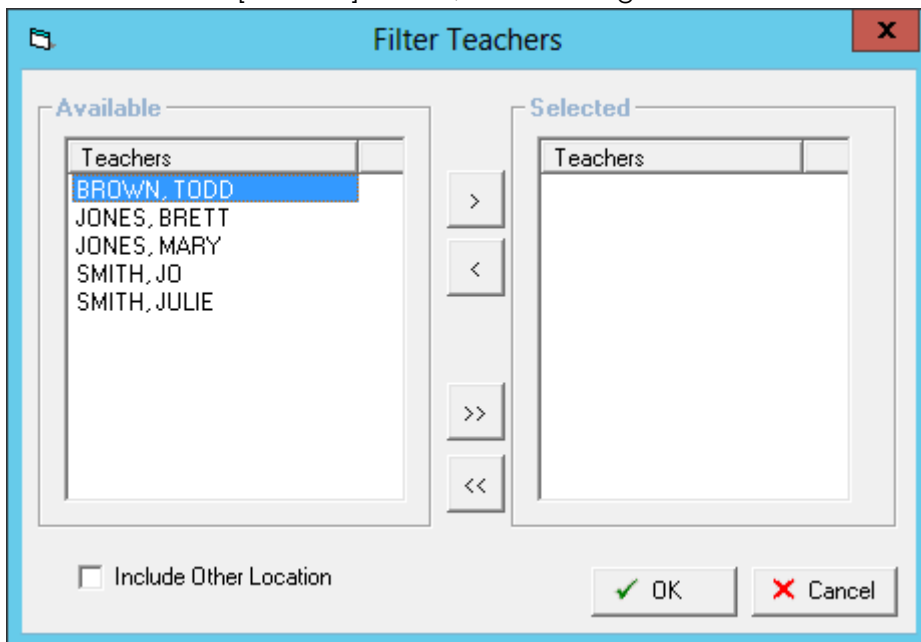
Using the Teacher Filter

1. Select the [Teacher] button, the following window will then be displayed:

2. Narrow your selection to the desired teacher/s, by clicking on a teacher from the left hand column to highlight, and depress the [>] button. Alternatively, double click to move the teacher to the 'Selected' list on the right hand side.
   Repeat the above process until all desired teacher/s have been brought across.
   To move all teachers depress the [>>] button.
   Note: If you are a multi-location database you will have the option to tick 'Include Other Locations' to be able to select the other location'steachers.
3. Select [OK]
4. The Visual Scheduler will then be refreshed to display the desired teacher/s and corresponding classes

Double-Click Actions

The following actions can be enabled so that when you double-click on a class, the action selected is performed. To change the selection, simply click on the radio button next to the desired action.


- **Make Booking** - This option is used to book students into an available class. To make a student booking, refer to 'Making a Standard Class Type Booking' section of this User Guide
- **Move Booking** - This option is used to cease the original booking and move student/s into another preferred class. Refer to 'Move Bookings' section of this User Guide
- **Booking Manager** - This option is used to view and suspend students booked in the class. Booking Manager can also be used to update the skills achieved bystudents in the class. For more information regarding this visit the 'Booking Manager'section of this User Guide

  Note: Student Details and Family Details screens can also be accessed through Booking Manager.
- **Class Detail** - Displays full class details, such as; student bookings, term information, cost, area, level and teacher. From this screen, permanent changes can be made to some class specifics such as time. Future changes to level, area and/or teacher from a specific date can also be made from this screen

  Note: Right clicking on any class will also display the options listed above.
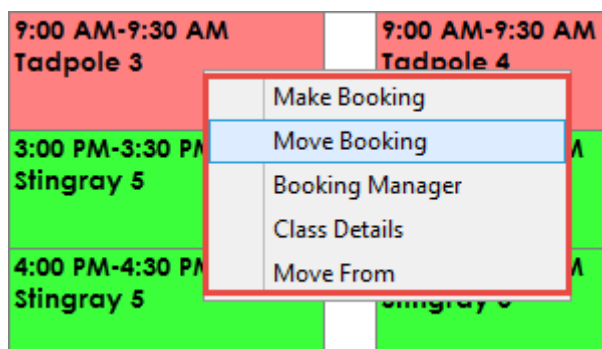
Note: The 'Move From' feature shown in the screen shot above will be described in detail in the 'Move Bookings; section of this User Guide.

Options

As mentioned above, when first opening the Visual Scheduler the default display for each class shows the time, level and number of vacancies. This view will change upon selection of the options below.

Show More Detail

By selecting 'Show More Detail' the Visual Scheduler will display the following information:

- **Time of the Class** - Class starts at 11:30am and finishes at 12:00pm
- **Level of the Class** - Class Level is Tadpole. The colour of the box also denotes the level
- **Permanent Vacancies** - The number '1' denotes that there is one permanent vacancy
- **Vacancies for the Day*** - The number '0' denotes there are no positions vacant for that date (meaning that there must be one make up or casual lesson booked)
- **Teacher** - 'Teacher, Teacher' is the assigned Class Teacher
- **Area** - Class is held in Area 'MP Lane 4'
- **Va/Sz** - Vacancy/Size represents the number of remaining permanent vacancies against the maximum number of students allowed to be booked into the class
- **Sus/Hld** - Suspension/Held will display the number of student bookings who have suspended and the number of student bookings who have been placed from a waitlist in the selected class
- **Mup/Cas** - Make up/Casual refers to the number of students booked in as a makeup and casual (one offs)
- **Av. Age** - Average age is based on the date of birth of student bookings within the class and displays both years and months. 'x.x' represents x years and x months.'0.0' will be displayed if there are no student bookings within a class or the student's dates of birth have not been entered.

Vacancies for the day will only be displayed if you have requested to include make ups, suspensions, held and trial bookingsin the vacancy calculation. This setting can be altered trough Admin> Site> Site Setup> Classes tab.

Note: This view is also available by hovering the mouse cursor over the desired class.

Student Details

The Visual Scheduler will display the students booked into the class when 'Show More Details' and 'Student Details' are selected. The view for each class will be displayed as shown above.

By selecting 'Show More Detail' and 'Student Details' the Visual Scheduler will display the following information:

- **Time of the Class** - Class starts at 11:30am and finishes at 12:00pm
- **Level of the Class** - Class Level is Tadpole. The colour of the box also denotes the level
- **Permanent Vacancies** - The number '1' denotes that there is one permanent vacancy
- **Vacancies for the Day*** - The number '0' denotes there are no positions vacant for that date (meaning that there must be one make up lesson booked)
- **Students** – This will list the students currently enrolled for this lesson (up to a maximum of 8 students), if they have a long name you will just see the surname. The 'M' shown above, indicates a makeup lesson has been scheduled for that student

Vacancies for the day will only be displayed if you have requested to include make ups, suspensions, held and trial bookings in the vacancy calculation. This setting can be altered trough Admin> Site> Site Setup> Classes tab.

Note: This view is also available if 'Student Details' option only is selected, by hovering the mouse cursor over the desired Class.

Additional Options

- **[Email] -** Email button will allow you to email a list of filtered class results to a customer
- **[Print] -** Print button will allow you to print a list of filtered class results for a customer
- **[Daily] -** Press this button to open the Daily Classes screen. For more information please see the 'Daily Classes' section of this User Guide
- **[Refresh] -** This button will refresh any changes that have been made to classes on the Visual Scheduler
- **[Students] -** Press this button to view the Student Details screen, access to the Family Details screen can also be made through this button
- **[Close] -** Press this button to close the Visual Scheduler

Making a Booking

Class Types

It is imperative that the person making the booking understands the concept of Class Types and the specific way it affects all classes allocated within a Class Type.

Class Types parametersdefine:

- If the Class Type is Standard, Squad or Holiday Program
- Whether the class is run on a term, perpetual or a combination of both term and perpetual bookings
- If perpetual; the Class Type defines direct debit conditions
- Sales Categories; where payments are to be financially allocated within Links
- If suspensions are allowed

For more information on Standard, Squad and Holiday Program Class Types please refer to the Admin User Guide.

The only differences between term and perpetual based bookings occur in the final booking screen. These differences will be highlighted when it is addressed later in this document.
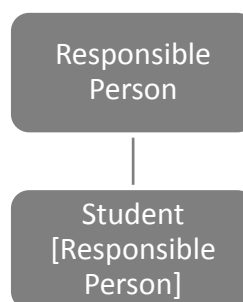
Responsible Person/Student Relationship

The second important concept is the responsible person to student relationship.

Example 1   Example 2

```
            Responsible                          Responsible
              Person                               Person
               |                                      |
      ┌────────┴────────┐                         Student
   Student        Student                      [Responsible
   [Child 1]      [Child 2]                        Person]
```
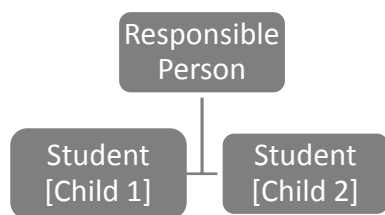
All students booked into a class must also be linked to a responsible person.

Example 1: If a child makes a booking for a class then this child must have a family/responsibleperson account established as well. This family account will detail the financial booking information for the student and any other students attached to the family account. A family/responsible person account is normally the child's guardian and can have multiple students attached to it. Refer to 'Example 1' diagram above.

Example 2: If a responsible person (adult) makes a booking for a class then this person must also be set up as the family/responsible person account as per Example 1. In this

example however, the adult becomes both the responsible person and student. Refer to 'Example 2' diagram above.
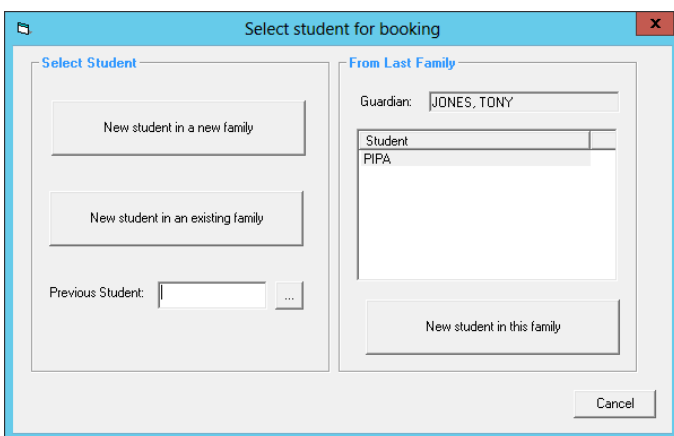
Creating a New Booking for a Student

To make a new booking, use either of the following processes:
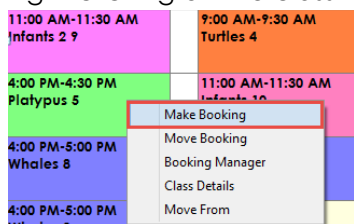
1. Setdouble-click action to 'Make Booking'
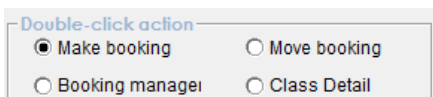
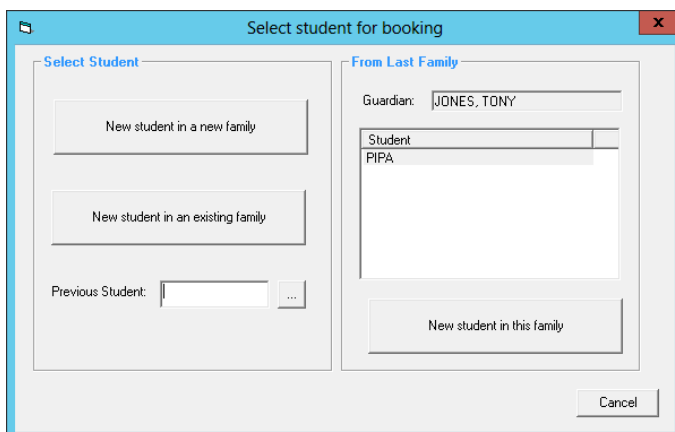2. Double click on an available class within the Visual Scheduler, the following screen will then open:

-OR-

1. Right clicking on the class within the Visual Scheduler

2. Select'Make Booking', the 'Select student for booking' screen will then open

Understanding the Select Student Options

- **New Student in a New Family:** The student has not previously been booked into a class, nor has the responsible person had other students booked into classes.
- **New Student in an Existing Family:** The student has not previously been booked into a class, however the responsible person has had other students booked into classes (i.e. student's siblings have been enrolled).
  Previous Student: The student has previously been booked into a class and is part of a responsible person's family.
- **From Last Family:** Use this option if subsequent bookings are being made for students in the same family.

Creating a New Booking for a New Student in a New Family

The steps listed below should be followed when both the responsible person and the student (including any siblings) has not previously been booking into any classes.

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above

2. Select [New Student in a New Family]

3. The new Customer Setup screen will then open, enter in the responsible person's details and click [Save]

4. Next you will be asked to enter the student's details (take note of the black box across the top of the Customer Setup screen). Once the student's name is entered click [Save]
Note: Some details such as last name, address, phone numbers and email will be copied across to the student's profile from the responsible person.

For term bookings, please go directly 'Creating a Term/Upfront Booking' section of this User Guide.

5. For perpetual bookings, enterdirect debit information

This section is used to choose how the responsible person will be paying for the class booking. There are three payment options to select from; these being cash, Links credit card and Links bank debit.

The Direct Debit Information screen will always open for new students if the Class Type has been set up as perpetual & term bookings together or perpetual only bookings.

Note: Default payment type can be set through Admin> Classes> Class Settings> Default Payment Type.

- **Cash** - Select this option to have the debit process create an outstanding charge which must be paid through POS or if the booking for the new student is a term booking requiring an upfront payment. Click [OK] to progress from this screen

- **Credit Card** - Select this option to have direct debit payments taken through given Credit Card details

- **Bank Debit** - Select this option to have direct debit payments taken through given Bank Account details

6. Once the payment details are entered click [OK] and the Create Student Booking screen will open

   Note: If the Class type selected has term & perpetual booking together the booking type will default to perpetual.

   To finalise the booking process, please see the sections below for 'Creating a New Perpetual/Direct Debit Booking' or 'Creating a New Term/Upfront Booking'.

Creating a New Booking for a New Student in an Existing Family
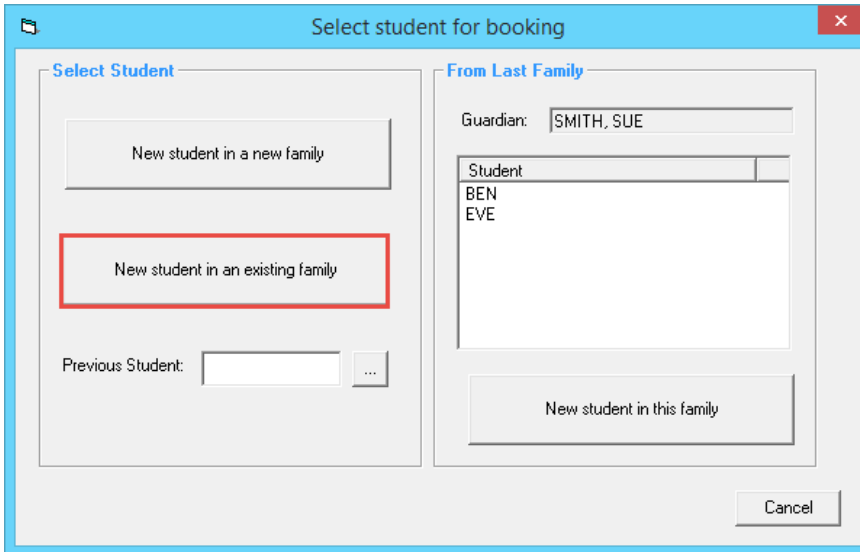
In this scenario, the student has not previously been booked into a class, however the responsible person has had other students booked into classes (i.e. student's siblings have previously been enrolled).

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above

2. Select [New Student in an Existing Family]

3. The 'Find Families' screen will display, search for the responsible person by their surname (or by any part of responsible person's name by changing radio button to 'Containing')

4. Select the desired family from the list
5. The Customer screen will be open to enter the new student's details as a part of this family

6. Click [Save] and the 'Create Student Booking' screen will open
7. To finalise the booking, see the 'Creating a Perpetual/Direct Debit Booking' or 'Creating a Term/Upfront Booking' section of this User Guide

Creating a Booking for a Previous Student

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above

2. Search for the student by either:
   a. Typing their Customer ID and hitting enter
   b. Scan their card
   c. Selecting the [...] button
   d. Alternatively, you can add a new student by clicking on [Add].

3. The Create Student Booking screen will open. To finalise the booking, see the 'Creating a Perpetual/Direct Debit Booking' or 'Creating a Term/Upfront Booking' section of this User Guide
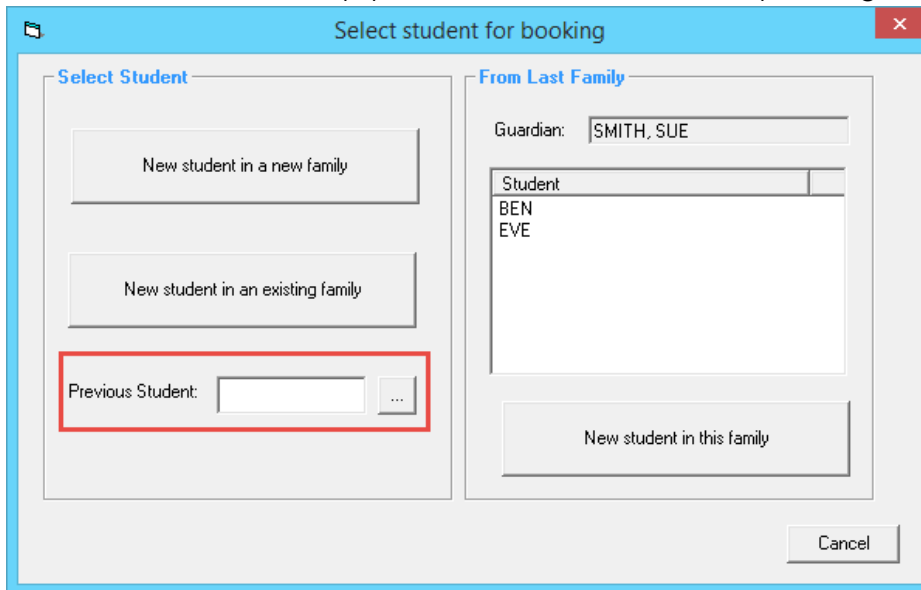
Creating a New Booking from the Last Family

This option should be used when subsequent bookings are being made for students in the same family.

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above

2. Either select a previous student from the 'From Last Family' list (and go to directly to step 5) or click [New student in this family] button to enter a new student's details

3. Enter the student's details

4. Click [Save], the 'Create Student Booking' screen will open

To finalise the booking, see the 'Creating a Perpetual/Direct Debit Booking' or 'Creating a Term/Upfront Booking' section of this User Guide.
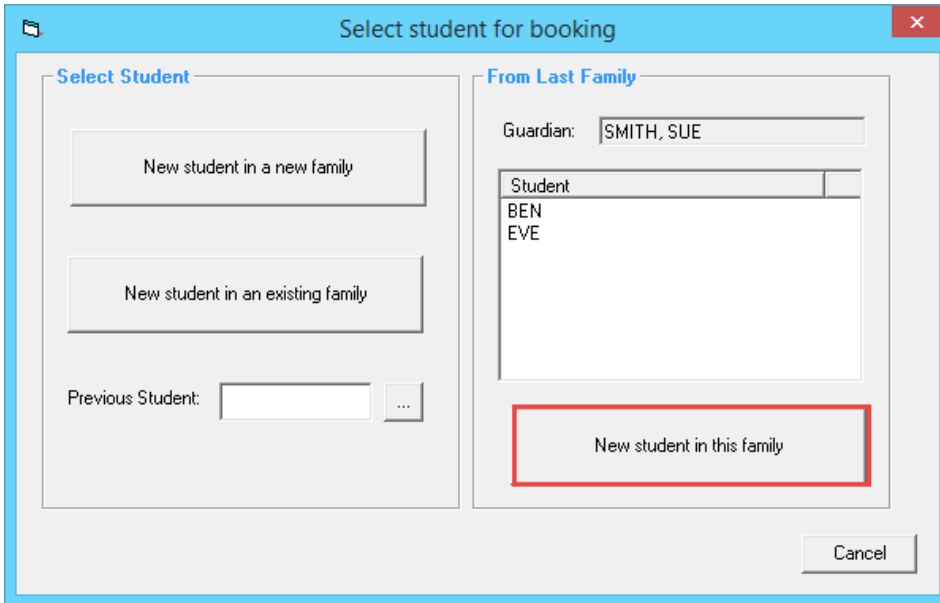
Making a Standard Class Type Booking

Classes> Classes> Visual Scheduler

Creating a New Perpetual/Direct Debit Booking

The steps below will commence from the Create Student Booking screen. For steps leading to this please see the 'Creating a New Booking for a Student' section of this User Guide.

1. The 'Booking Type' will default to perpetual

2. For perpetual bookingsthe Customer will be expected to pay a 'pro rata'.This payment is for the number of classes the student will have prior to the next debit run

3. To understand the amount of pro rata the customer is paying you can click on the [?] for an explanation of the cost

Note: There is no end date for perpetual bookings as the booking is ongoing until a cease date is added to the student's booking. See the 'Canceling a Student Booking' section of this User Guide for more information.

Payment for this booking can be made in two ways when finalising this booking:

1. If NO payment is to be made on the completion of this booking:
   Press the [OK] button and the booking will be finalised. The amount for this booking is now considered as an outstanding account and can be paid through POS at a later time or date.

   -OR-

2. To process a payment now:
   a. Click the [Pay Now] button
   b. Specify the 'Amount to Pay' in the applicable field
   c. Click[OK]
   d. POS Module will open displaying the transaction to be processed
   e. Process the transaction as per normal.

For more information about how to process a transaction please see the POS User Guide.

Note: Depending on the version of Windows being used, it may be necessary to click on the POS icon on the Windows toolbar to display the POS screen, it will most likely be flashing orange.

Creating a New Term/Upfront Booking

The steps below will commence from the Create Student Booking screen. For steps leading to this please see the 'Creating a New Booking for a Student' section of this User Guide.

Note: If the Class type selected has term &perpetual booking together the booking type will default to perpetual.

1. Select the booking type as 'Term'
2. The term details will be shown with a start and end date
3. The student will be charged for the number of classes within the term based on the start and end dates of the booking

Payment for this booking can be made in two ways when finalising this booking:

1. If NO payment is to be made on the completion of this booking:
   Press the [OK] button and the booking will be finalised. The amount for this booking is now considered as an outstanding account and can be paid through POS at a later time or date.

   -OR-

2. To process a payment now:
   a. Click the [Pay Now] button
   b. Specify the 'Amount to Pay' in the applicable field
   c. Click[OK]
   d. POS Module will open displaying the transaction to be processed
   e. Process the transaction as per normal.

For more information about how to process a transaction please see the POS User Guide.

Note: Depending on the version of Windows being used, it may be necessary to click on the POS icon on the Windows toolbar to display the POS screen, it will most likely be flashing orange.

Making a Squad Class Type Booking

Classes> Classes> Visual Scheduler

Squad classes are grouped and the available classes within the groupare listed at the top of the Create Student Booking screen.

Squad bookings must be perpetual; there is no term booking option with squad classes, and as such a pro rata is established at the time of booking for the remainder of the debit period.

The pro rata is calculated by:

| Total Cost of the DD Period | ÷ | Number of classes in the period | × | Number of classes left in the period |

A breakdown of this figure is given by clicking the [?] button.

To Make a Squad Booking

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above
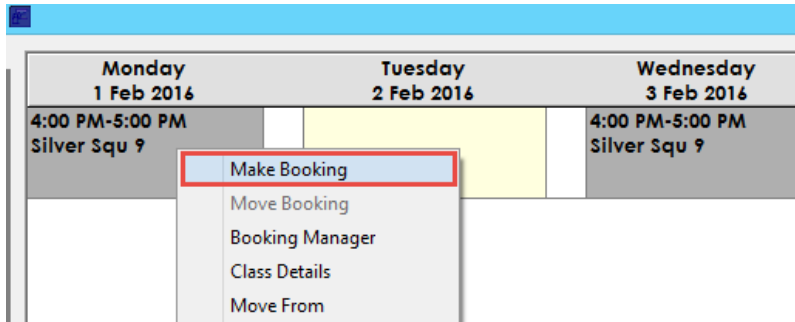
2. Search for the student by either:
   a. Typing their Customer ID and hitting enter
   b. Scan their card
   c. Selecting the [...] button
   d. Alternatively, you can add a new student by clicking on [Add]
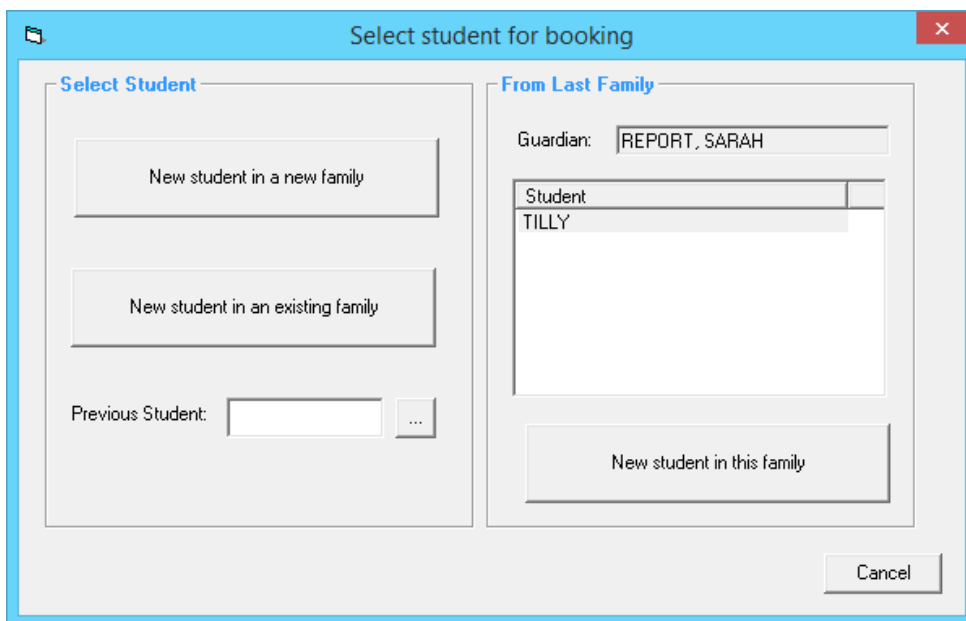
3. The 'Create Student Booking' screen will open. As this a squad booking and all the Silver Squad classes have been linked together you select either all classes or select the days the student will be attending. In the example below the student will be attending on Monday and Friday only.
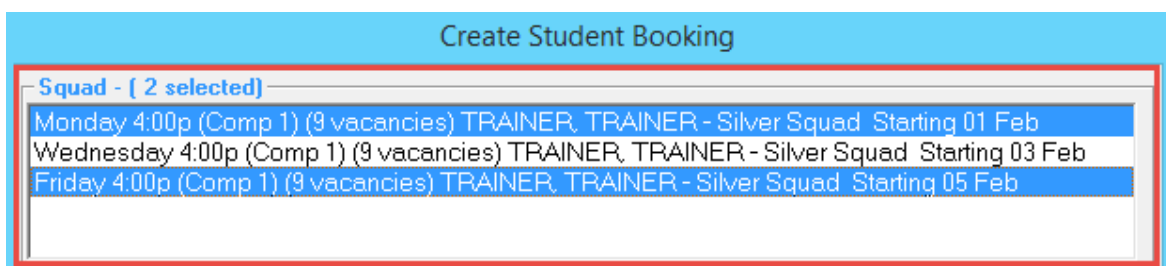
4. The booking type will automatically default to perpetual

5. As all Squad Class Type bookings are perpetual; a pro rata will be calculated at the time of making booking. By clicking on the [?] button, this will show you the breakdown of the pro rata Links is asking to be collected at time of making the booking prior to the next debit run

6. Click on [Pay now] and [OK] to finalise the booking and be redirected to POS to take payment. If not, the money will be left outstanding on the family account to be paid later

Making Holiday Program Class Type Booking

Classes>Classes> Visual Scheduler

Holiday Program bookings work very similar to Squad Class Type bookings where the weekly classes are linked together. However all holiday programs must be paid upfront there is no perpetual option for Holiday Program Class Types.

To Make a Holiday Program Booking

1. Open the Visual Scheduler and using your filters, select the 'Class Type' button to modify the Class Types selected
2. Select the Holiday Program Class Type from the available list and click [OK]
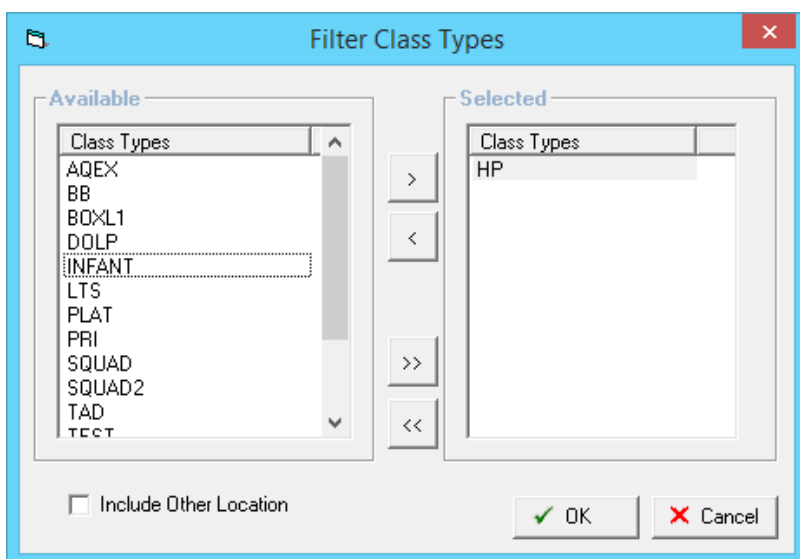
3. Either enter in the start date of the Holiday Program or use the [+] button to move forward a week at a time
    Note: [Fixed Date] button can be used if the correct date has been setup through Admin Module.
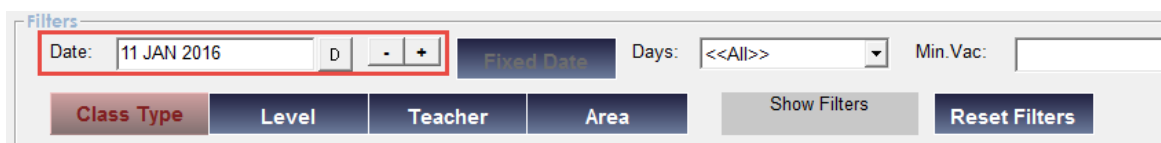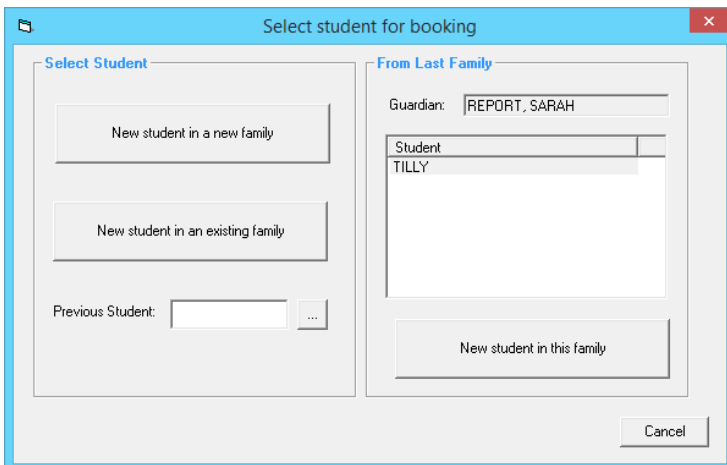

4. Below is an example of a Holiday Program week:

5. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above

7. Search for the student by either:
   a. Typing their Customer ID and hitting enter
   b. Scan their card
   c. Selecting the [...] button
   d. Alternatively, you can add a new student by clicking on [Add]

6. The 'Create Student Booking' screen will open. As this a holiday program booking all the Platypus holiday program classes have been linked together. Either select all the classes listed or the individual days the student will be attending

Create Student Booking

Holiday Program - [5 selected]

11 Jan Monday 9:00a (Lap 4) (4 vacancies) SWIM, MATT - Platypus
12 Jan Tuesday 9:00a (Lap 4) (4 vacancies) SWIM, MATT - Platypus
13 Jan Wednesday 9:00a (Lap 4) (4 vacancies) SWIM, MATT - Platypus
14 Jan Thursday 9:00a (Lap 4) (4 vacancies) SWIM, MATT - Platypus
15 Jan Friday 9:00a (Lap 4) (4 vacancies) SWIM, MATT - Platypus

Student Details

Student No.: 138   Age:
Name: REPORT, KYLIE
Responsible Person: REPORT, SARAH

Booking Type

◉ Casual
○ Makeup

Fees

Discounts/Concessions

Discount: 0 %
(first child, first class)
☐ Concession

Joining fee: $ 0.00
+ Booking fee: $ 75.00
- Discount: $ 0.00

[Pay now]

= Due: $ 75.00   Family Credit: $ 0.00
Amount in Credit: $ Amount to pay: $ 0.00

■ = Vacancy   ■ = Fully Booked
■ Filled by Make Up/Trial/Held/Susp   ■ = Public Holiday

[Customer Details]   [✓ OK]   [✗ Cancel]

7. The 'Booking Type' is defaulted to 'Casual'
8. Click on [Pay now] and [OK] to finalise the booking and be redirected to POS to take payment. If not, the money will be left outstanding on the family account to be paid later

Note: The classes highlighted blue at the top of the Create Student Booking screen are to be included in the booking. Depending on the settings of the Holiday Program Class Type, all classes in the group can be selected by default or none selected by default.

You can only book a student into a Holiday Program class as a makeup if the Class Type is set up as 'select classes to book into'.

If the Class Type setup requires a student to be booked into all classes then they will be enrolled in all remaining classes. You will not have the option of unselecting classes.

Detailed Overview of the Create Student Booking Screen

This window is used to finalise student bookings. Provided below is a detailed breakdown of each of the sections within the 'Create Student Booking'screen.

Class Details

Displays details relating to the class the student is to be booked into. This is a read only section.

Booking Type

Defines the 'Booking Type' and the payment conditions for the class selected. The ability to choose different booking types is dependent of the Class Type parameters allocated to this class.
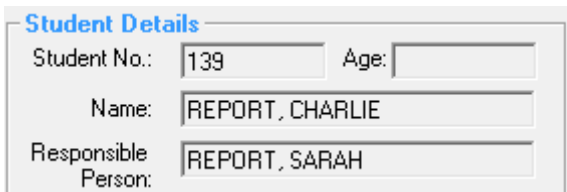
- **Term** - The term booking type will book the student in from the date specified to the end of the term period. The booking will create a fee for the classes within the booking period. You do have the option of selecting a future term from here if required and available.
- **Perpetual** - A perpetual booking will ignore any term dates and continue until cancelled. Payments are made by direct debit – either cash, bank account or credit card.
- **Make up** - A make up is a once-off booking charged at the fee specified within the class setup for make ups.
- **Casual** -A casual booking is a once-off booking charged at the fee specified within the class setup for casual bookings – there is also an option for a concession fee.
- **Trial** -A trial booking option enables a term or perpetual booking to be made without generating fees. The booking will be shown on the trial bookings screen to book or cancel.
- **Direct Debit** – This option will automatically be checked if perpetual booking option has been selected.

Note: If the Class Type is 'Perpetual and Term' there will be a choice of selecting between a perpetual based class and term class payment. The default setting for 'Perpetual and Term' Class Types is perpetual.
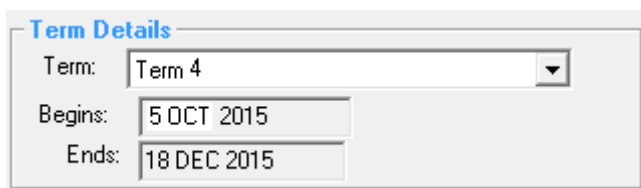
Student Details

Displays details relating to the student who is to be booked into the class. This is a read only section.

Term Details

For term bookings, the term selection will default to the current term, however can be changed using the drop down menu. The beginning and end dates for the selected term will also be displayed.
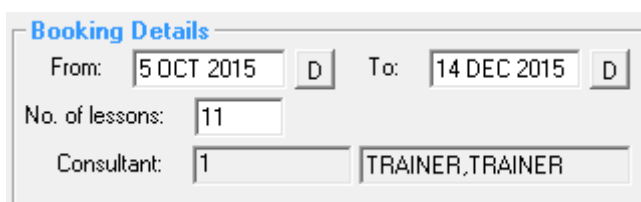
Booking Details

Displays various booking dates and the number of lessons a student will be attending along with the staff member who is making the booking.

- **From** - The 'from' date will reflect the date of the class that was chosen from the Visual Scheduler, i.e. the date of the first class. There is the option of changing this date by clicking on the [D]button to select a start date, however the new date can only be when the same class is available, i.e. weekly.
- **To** -The 'to' date will automatically default to the last day of the booking within the term. You do have the option of changing this date by clicking on the [D] button to select the finish date.
- **No.of Lessons** - Links will establish how many lessons are left in the term based on the 'from' and 'to' dates. The fee will be calculated on this figure. This number can also be manually decreased and thus the 'to' date will automatically refresh
- **Consultant** - This is the staff member currently logged into Links unless the switch 'Require user login to create/remove booking' is turned on in the Admin Module in which case it will display the staff member who entered their username and password upon making the booking.

  'Require user login to create\remove booking' can be turned on/off through Admin Module> Site Setup> Classes Tab.

Note: If making a perpetual booking, the 'From' date and 'No. of Lessons' fields are not displayed.

Fees

Discounts/Concessions

The discounts that have been setup within the discount table for number of students in the familyand number of bookings for the student will define what percentage discount will be given to the booking. The concession pricing can be allocated using the tick box, or a manual discount can be entered.

Discount table and concession pricing is setup through the Admin Module. Please refer to the Admin User Guide for further information on this setup.

- **Joining Fee**-Inserts an applicable joining fee that has been assigned to this Class Type.Please refer to the Admin User Guide for further information relating to joining fees.
- **+Booking Fee** - For term bookings, the booking fee is calculated by:

  Term Booking Fee   =   No. of Lessons x Cost per Lesson

- **+ProRata** - For perpetual bookings, the pro rata is determined by:

  Pro Rata   =   Total Cost of DD Period x No. of Lessons left in period
                   No. of Classes in Period

  A breakdown of this figure is given by clicking the [?] button.

- **Include Next Period**- This box can be selected if you wish to add the next direct debit period payment to the pro rata for perpetual bookings. This option is most often used when it is too late to add the family onto the upcoming direct debit run.

- **-Discount** - This represents the value to be deducted from the booking fee if a discount has been calculated by the system.
- **=Due** - The total amount due and equals the joining fee plus the booking fee/pro rata less anydiscounts.
- **+Registration Fee** - If a registration fee has been added the amount will appear here. For more information regarding registration fees please see the Registrations section of this User Guide.

Retention Program (optional)

If a retention program is available for this Class Type, select the appropriate program from the drop down menu. This may be a mandatory field depending on your system settings. For more information regarding retention programs and setup please see the Retention User Guide.

Note: Retention programs are only available to Links customers who have purchased the Retention Module.

Vacancy Information

When entering the booking details the vacancy information will be displayed highlighting how many lessons are remaining and the status of the lessons as being one of the following:

Green = Vacancy

Red = Fully Booked

Pink = Filled by Make Up/Trial/Held/Suspension

Yellow = Public Holiday

Note: For perpetual bookings a maximum of 31 weeks will display in the Vacancy Information section of the Create Student Booking screen. Perpetual bookings continue until cancelled. For more information on cancelling a booking please see the 'Cancel Bookings' section of this User Guide.
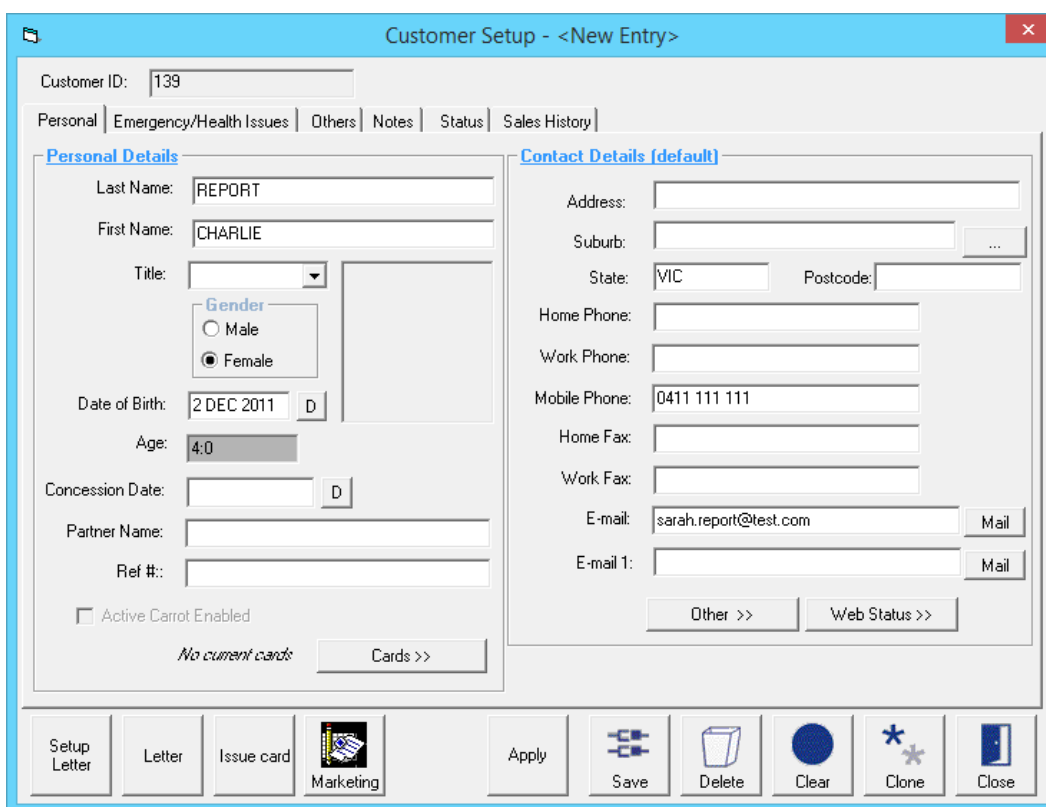
Customer Details

This button will open up the student's Customer screen. Here you are able to make adjustments to the students details if required, including allocating a card. As shown below:

Casual Bookings

A casual booking allows you to make a one off booking for a single lesson. In the Admin Module you can select if your centre permits 'Casual Bookings' Admin> Site> Site Setup> Classes Tab.

Making a Casual Booking

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above
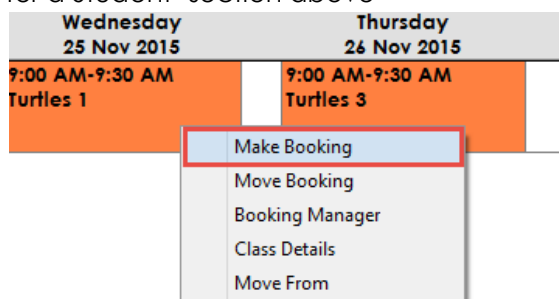
2. Search for the student by either:
   a. Typing their Customer ID and hitting enter
   b. Scan their card
   c. Selecting the […] button
   d. Alternatively, you can add a new student by clicking on [Add]
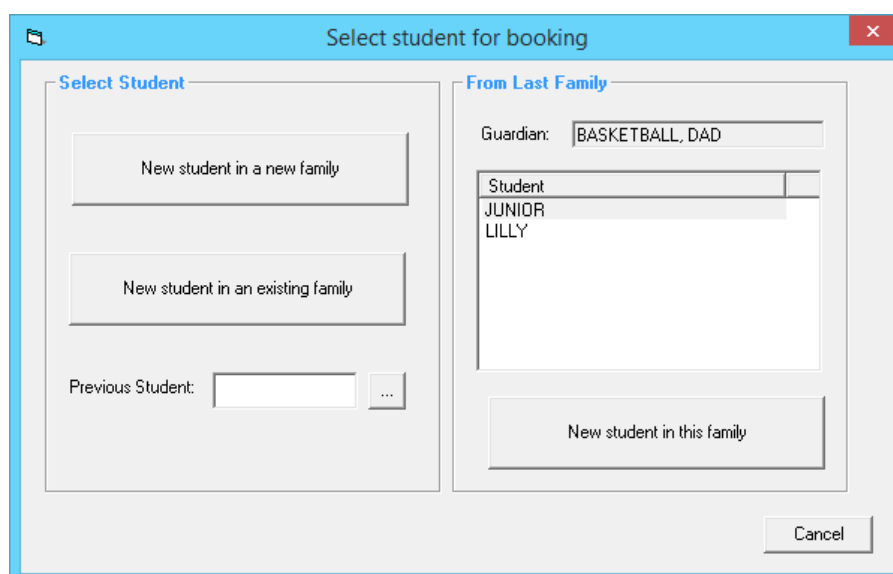
3. Once the student has been selected or a new student has been created the 'Create Student Booking' screen will open
4. Select the booking type as 'Casual

5. The 'Booking Details' will update to show the single date of the booking
6. The '+ Booking Fee' will show the cost of the casual lesson
7. The 'Vacancy Information' will only show one date/lesson and that will be the date of the booking

8. Click on [Pay now] and [OK] to finalise the booking and be redirected to POS to take payment

Makeup Lessons

You may want to offer your students a makeup lesson during the course of their enrolment. To book a makeup lesson follow the steps below.

Booking a Make Up Lesson

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above
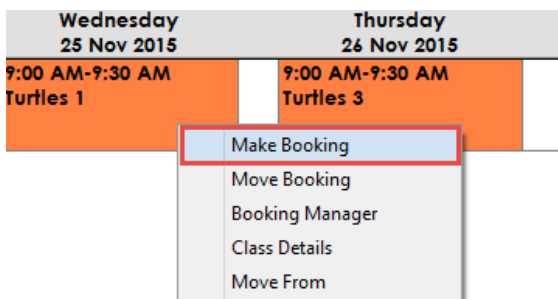
2. Search for the student by either:
   a. Typing their Customer ID and hitting enter
   b. Scan their card
   c. Selecting the […] button
   d. Alternatively, you can add a new student by clicking on [Add]
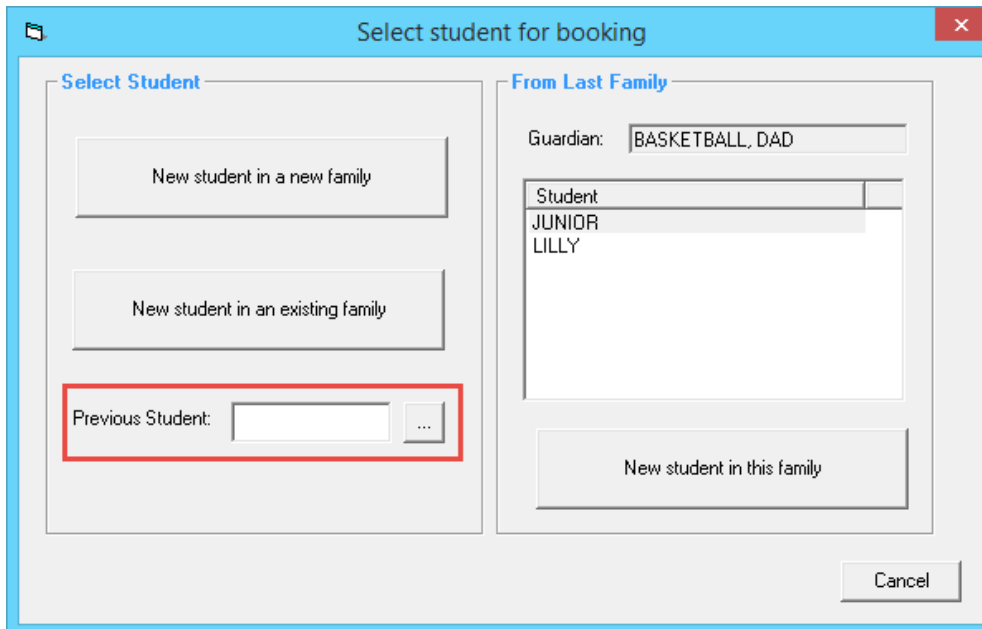
1. Once the student has been selected or a new student has been created the 'Create Student Booking' screen will open
2. Select the booking types as 'Makeup'

3. The 'Booking Details' will update to show the single date of the booking
4. If a price has been set the 'Booking Fees' will automatically show the cost of the makeup lesson otherwise you can type in a fee here
5. The 'Vacancy Information' will only show one date/lesson and that will be the date of the booking

6. Click on [Pay now] and [OK] to finalise the booking and be redirected to POS to take payment. If no there is no cost associated with the makeup lesson just click [OK] to finalise the booking

Trial Bookings

In order to be able make a trial booking this needs to be first set up in the Admin Module under Classes> Class Types. Refer to the Admin User Guide for more information in regards to allowing trial bookings.

Making a Trial Booking

1. To commence a new booking complete steps 1-2 in the 'Creating a New Booking for a Student' section above
2. Search for the student by either:
    e. Typing their Customer ID and hitting enter
    f. Scan their card
    g. Selecting the […] button
    h. Alternatively, you can add a new student by clicking on [Add]
3. Once the student has been selected or a new student has been created the 'Create Student Booking' screen will appear
4. Select the booking type as 'Term' and click 'Trial'

5. Under booking details enter the date of trial lesson
6. Click [OK] to finalise the trial lesson

Classes> Classes> Trial Bookings

This screen will display all students who have been booked in for trial bookings. The following details are displayed for each booking:

- Student Name
- Responsible Person Name
- Phone Number
- Class Type
- Level
- Details – Day/Time/Area
- Teacher
- Trial Date
- Status – Attended/Cancelled/Not Attended

Trial bookings can be managed from this screen as follows:
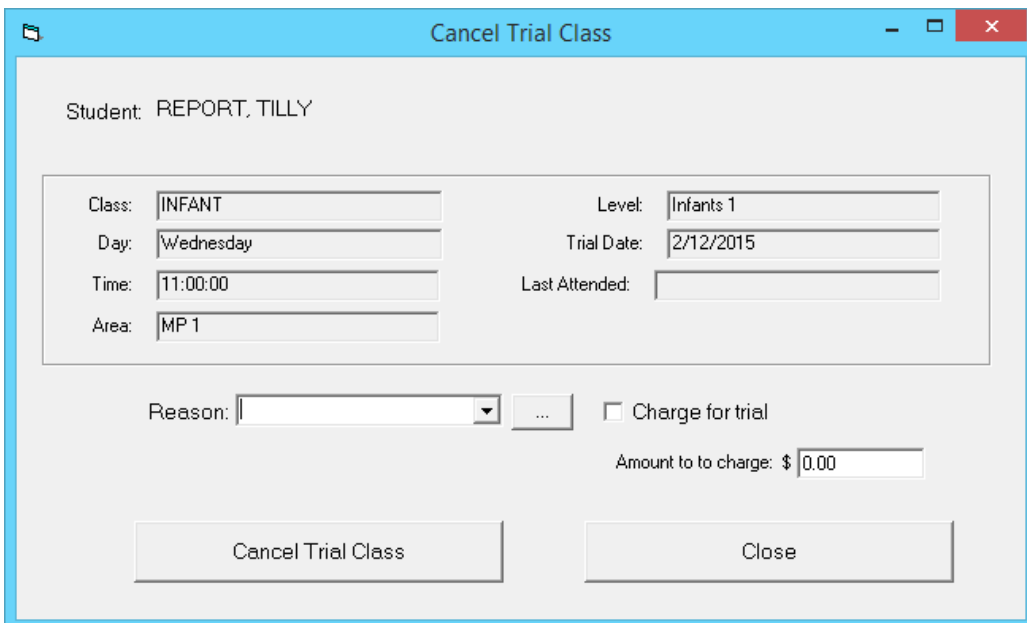
- **[Email]** - Send an auto generated email to confirm the trial booking details. An auto generated confirmation email can be turned on through Admin Module to send upon making the booking. Please refer to the Admin User Guide.
- **[Student Details]** -View the Student Details screen
- **[Family Details**] - View the Family Details screen
- **[Book It] -** Convert the trial booking to a permanent booking. Clicking this button will open the Create Student Booking screen.
- **[Cancel Trial] -**Will open the Cancel Trial Class screen. See below for how to cancel a Trial Booking.
- **[Close] -**Press this button to close the Trial Bookings screen

Converting a Trial Booking to a Term or Perpetual Booking

1. Open the Trial Booking screen; Classes> Classes> Trial Bookings
2. Highlight the student to be converted to a term or perpetual booking
3. Select [Book It] which will open the Create Student Booking screen
4. Continue with the new student booking process as stated previously in this document
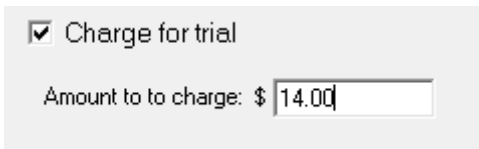
Cancelling a Trial Booking

1. Open the Trial Booking screen; Classes> Classes> Trial Bookings
2. Highlight the student to be cancelled
3. Select [Cancel Trial], you will be asked if you would like to continue, select [Yes]the following screen will appear:

4. Select a reason from the drop down menu
5. Select [Cancel Trial Class]

Note: A charge can be allocated to the trial booking through the Class Type setup in the Admin Module, however, can also be changed at the time of the cancellation. Click the 'Charge for trial' tick box as shown in the example below and enter an amount in the 'Amount to charge' field.

Making a Booking Summary

New Student in New Family – Term Booking

1. Open the Visual Scheduler
2. Apply filters as required to narrow down the search for a suitable class
3. Double click on the class you wish to enroll the student into
4. Select the [New Student in a new Family]booking button
5. Complete responsible person profile
6. Complete student profile
7. Once in the Create Student Booking screen check enrolment details are correct
8. Select 'Term' if not already selected (for Term and Perpetual Class Types)
9. Select the term they wish to enroll into
10. Fees will automatically be calculated
11. Click on [Pay Now]. The 'Pay Now' box will change to 'Pay Later'
12. Click [OK]
13. Complete transaction in POS

Previous Student – Perpetual Booking

1. Open the Visual Scheduler
2. Apply filters as required to narrow down the search for a suitable class
3. Double click on the class you wish to enroll the student into
4. Select the 'Previous Student' booking option
5. Click on the […] button to search for the student within the database
6. Once in the Create Student Booking screen check enrolment details are correct
7. A pro rata fee will be automatically calculated, click on the [?] to view the breakdown of the amount to be paid. If required, select 'Include Next DD Period'
8. Click on [Pay Now]. The 'Pay Now' box will change to 'Pay Later'
9. Click [OK]
10. Complete transaction in POS

Registration Fees
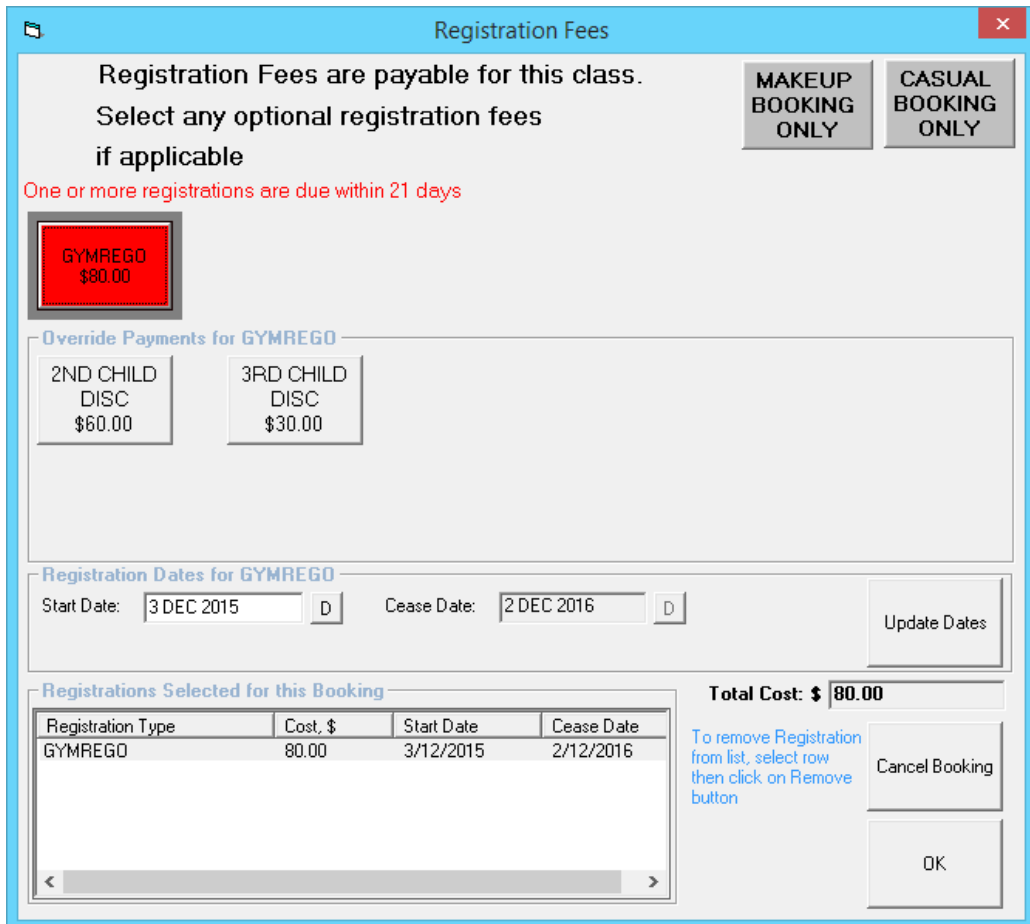
This section of the User Guide will detail applying, editing and removing registration fees. For information relating to the setup of registration fees, please see the Admin User Guide.

Applying a Registration Fee

At the time of making a booking the applicable registration fee will be allocated during the student booking process. It must be remembered that if a student already has the registration fee assigned to them and they book into another class within that Class Type this part of the process will be ignored.

Allocating a Registration Fee to a New Booking

1. Create a student booking as per normal, before entering the Create Student Booking screen the following screen will be displayed:
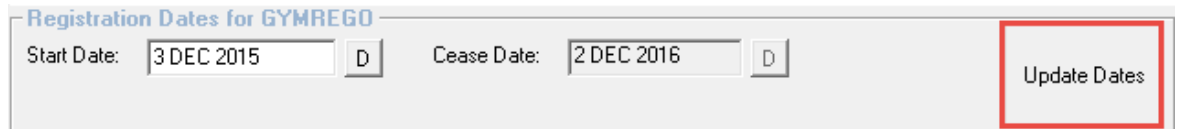
2. Select the required registration. In the above example the required registration fee is 'GYMREGO'.

   Note: Required registration fees are shown in red. If a registration fee is optional it is shown in grey.

If available, override options will also be displayed. There are two override options available in the example above, these are, '2ND CHILD DISC' and '3RD CHILD DISC'. If an override is required to be used, select the applicable option and the price displayed will be amended.

3. The date will default to be started immediately; this can be amended if required. Click on [Update Dates] if the date needs to be changed.
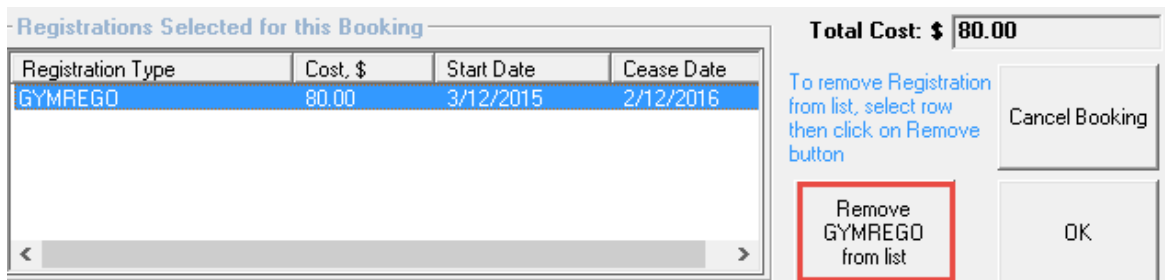
Removing a Registration Fee from a New Booking

1. Highlight the registration fee in the list
2. Select [Remove GYMREGO from list] button

3. If all variables are correct click on [OK] to continue to the 'Create Student Booking' screen

The cost of the registration fee will now be displayed in the Create Student Booking screen. The registration fee screen can be re-entered by selecting the [Registrations] button from the Create Student Booking screen.
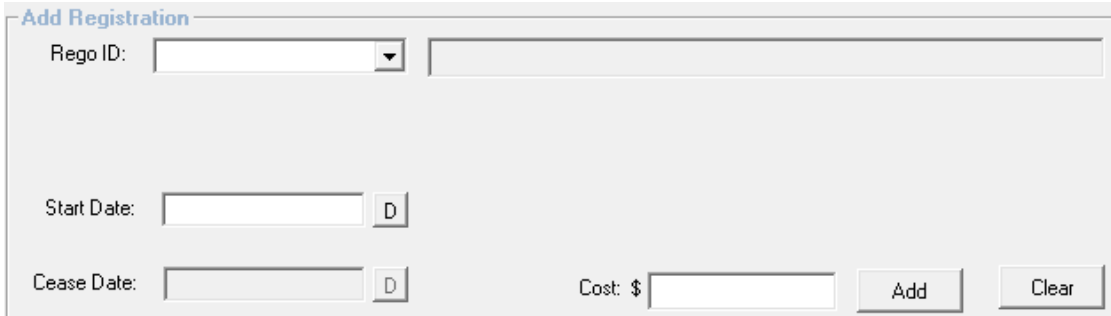
Adding or Editing a Registration Fee from the Student or Family Screen

Classes> Students & Families> Student Details/Families

The process by which this is done is identical in both the Student and Family screens. The 'Registration' tab in the Student Details screen will display the registrations applicable to the individual student, whereas, the 'Registration' tab in the Family screen will display the registrations assigned to all students within the family.

Adding a Registration Fee from the Student or Family Screens

1. Click on the 'Registration' tab
2. Click on the [Add New Registration] button, the below screen will open:
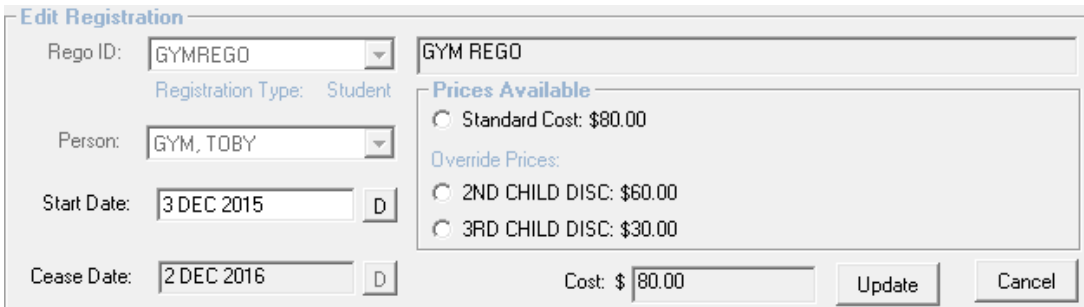
3. Select the Rego ID from the dropdown box
   Note: If adding a registration fee from the Family screen you will also need to select the student from the dropdown box
4. The 'Start Date' and the 'Cease Date' will automatically populate for the Rego ID selected, you can modified the dates if required
5. Select either the standard cost, the applicable override or enter registration fee amount
6. Click on [Add] to assign the registration fee

Note: There are security options for adding registration fees from the Student and Family screens. Please see the Admin User Guide for further information regarding Security Groups.

Editing a Registration Fee from the Student or Family Screen

To edit a registration fee from the Student or Family screens:

1. Click on the registration you wish to edit

2. Change the start date or price as required
3. Click on [Update]

Deleting a Registration from the Student or Family screens:

1. Highlight the registration you wish to delete and click on the red[x]

Note: A registration can only be deleted if the registration has not received any payments against it.

Family Details

Classes> Students & Families> Families

Family Details Tab

This tab shows the students that are linked to this family. It lists the student's given names, surname, identification number and health issues.
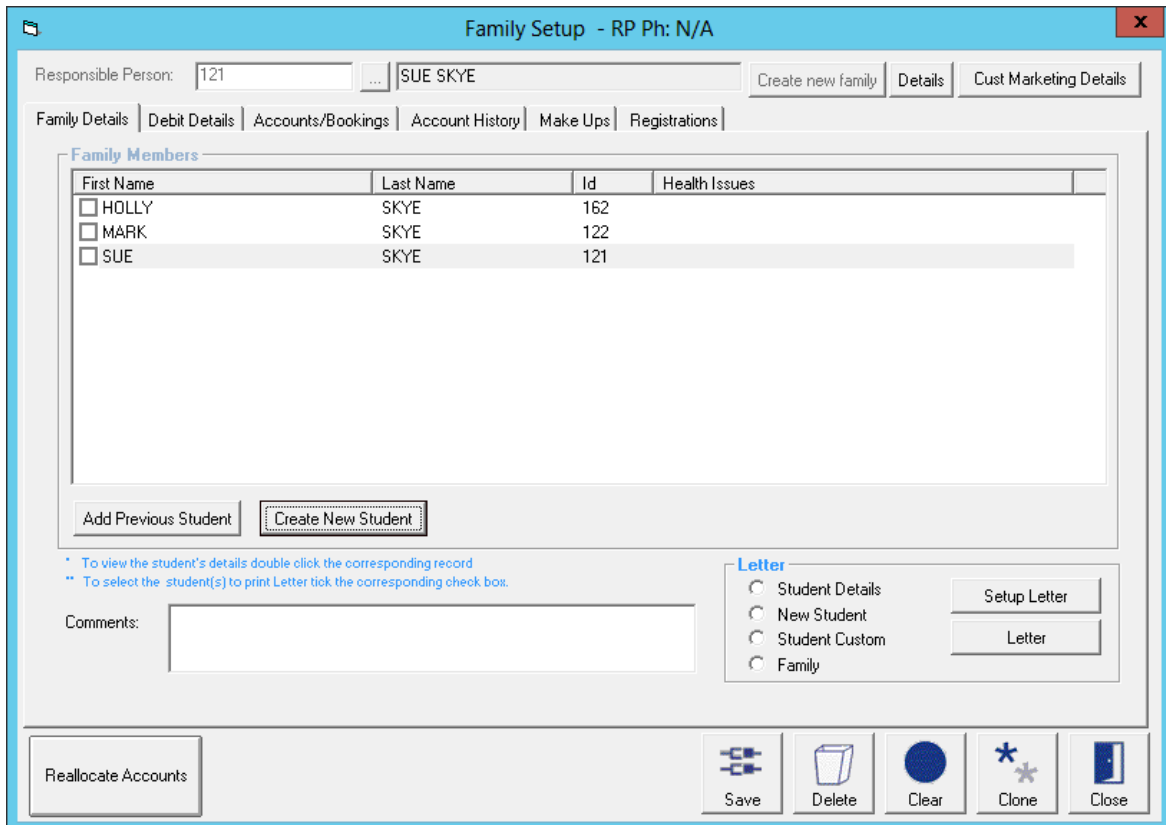
Family Members:

Double click on the individual student to view their details.
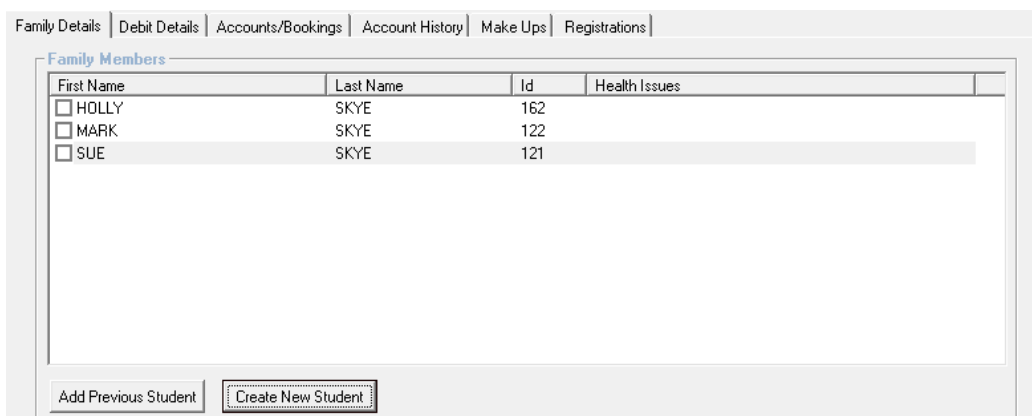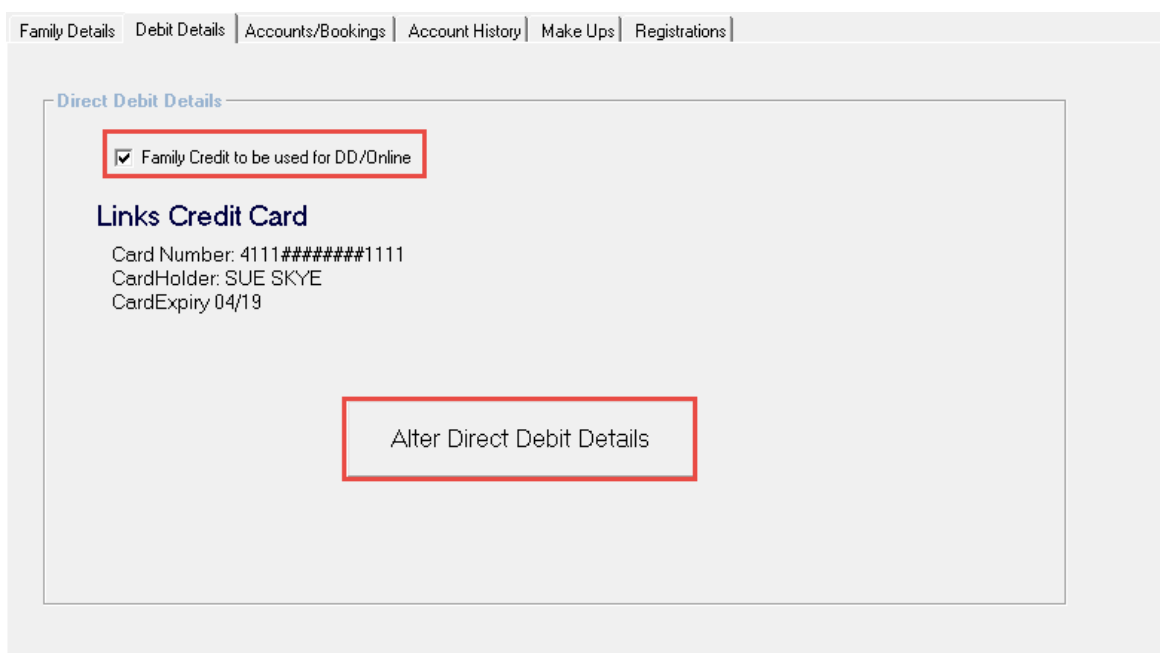
Click on [Add Previous Student] to attach an existing Customer to the family.The search screen will appear to find the Customer you wish to attach.

Note: A student that is already linked to another family cannot be added in this section. Please see the Move Student into another Family section of this User Guide.

Click on the [Create New Student] button to attach a new student to this family. This function will allow you to enter details about the student,it will not book them into a class.

Debit Details Tab

The debit details tab records the payment method for any perpetual (direct debit) bookings held by members of the family, these being, credit card, bank debit or cash.
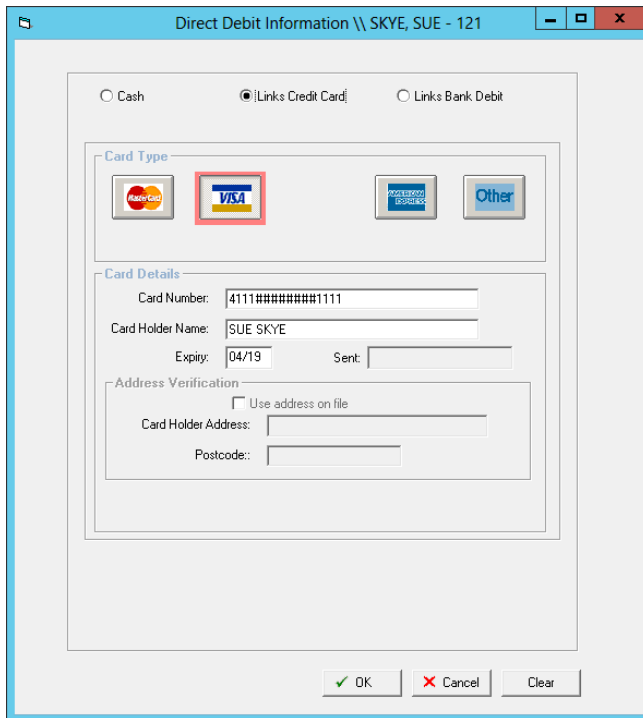
If you select the 'Family Credit to be used for DD/online' tick box you are allowing the responsible person's family credit to be used online or within the direct debit run.

Note: If this option is selected it will use the family credit assigned to the family automatically. If left unticked the family credit therefore cannot be used online or in the debit run to offset the cost.
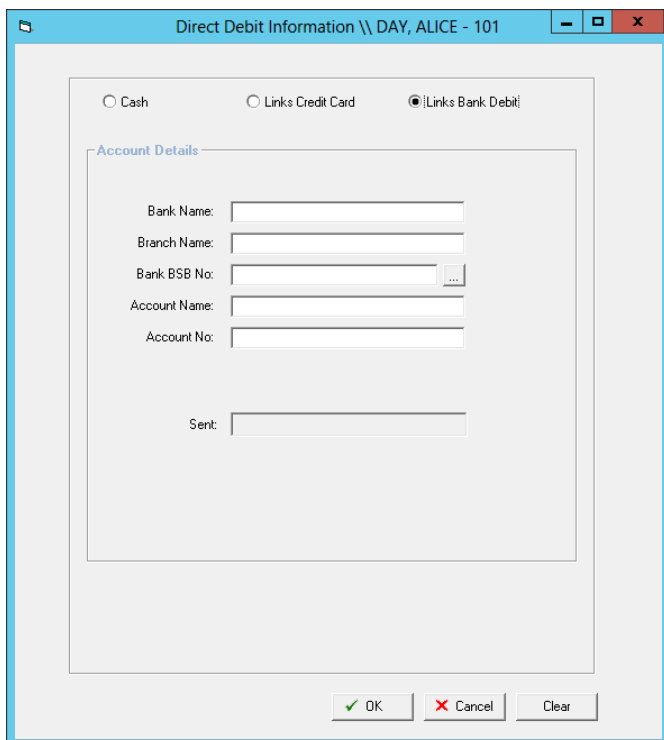
This option can only be selected per family (and not perstudent) therefore affecting all students within the family.

To alter direct debit details:
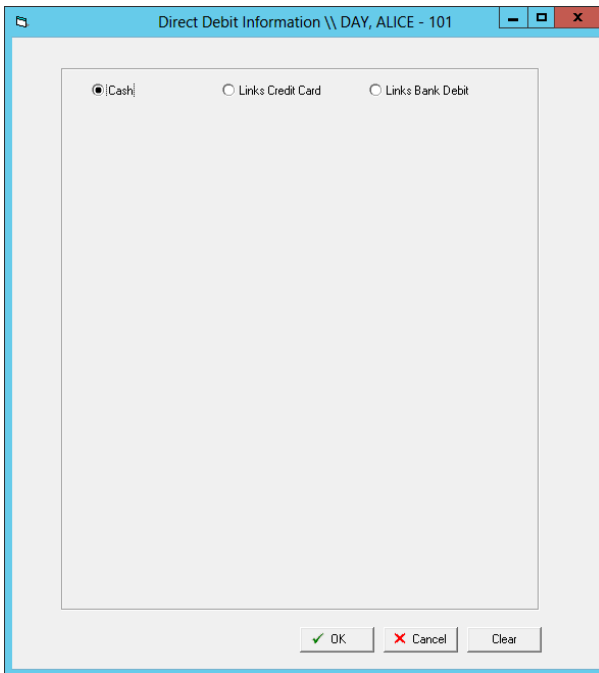
1. Click the [Alter Direct Debit Details] button shown above, in order to update the payment method (as shown below)

2. Select the 'Links Credit Card'option to modify/add credit card details

3. Select 'Links Bank Debit' to modify/add bank account details

4. Select 'Cash' if the payment method is unknown

Note: For the purpose of PCI compliance, bank and credit card numbers cannot be viewed in their entirety.

Account/Bookings Tab

This tab will display in depth payment explanations and details when a student booking is selected. Fees, payments and adjustments for the booking are displayed in the bottom left hand side boxes. Reasons for fees and any comments that were entered at the time of payment are displayed. Payment type (POS or Direct Debit) is also displayed. In addition, comments entered during a direct debit run are displayed with the direct debit notification.

By default only current bookings are displayed. To display previous bookings including cancelled and classes moved from select the 'History' radio button in the top left hand corner.

Make ups can also be included by checking the 'Include Makeups' box to the right of the 'History' button.

- **[Change Discount]** - Allows the discount applied to a booking be changed or switch between full price and concession price
- **[Make Adjustment]** -See the booking adjustments section of this User Guide for more information regarding adjustments
- **[Cancellation]** -By selecting a booking then selecting the cancellation button, you will be taken to the Student Cancellation screen for that booking. See Cancelling a StudentBooking section of this User Guide further information
- **[Reallocate Amounts]** -This feature can be used to move money received between bookings
- **[Print Outstanding Account]** -Prints the details of any monies currently outstanding for the selected booking
- **[Increase Family Credit]** – Used to provide a family with a credit for reasons such as promotional offer, cancelled lessons and so on. Please see the Family Credit section of this User Guide for more information regarding family credit.
- **[Print Booking Account Lines]** -Prints a statement of fees and payments made. Users are able to select a range of students, dates and Class Types to include in the report
- **[Direct Debit Summary]** – Creates a view of family payments made via direct debit. This summary can also be printed.

Adjustments:

The balance on booking lines can be adjusted manually, without making any financial impact upon the sales category figures. Please note that applying adjustments will not reflect upon the service code that the booking was allocated to. In order to follow true accounting practices family credits should be used for applying credits to family accounts/bookings. Please refer to the Family Credits and/or Adjustments sections of this User Guide for further information.

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. Check this box to apply the Special Family Discount percentage to all students within the family. To setup or amend the Special Family Discount please see the Admin User Guide.

Extended Family Discount:

This feature allows for an additional family discount to be applied over and above any other class discounts. This discount will automatically be applied to any family who falls within the required parameters.
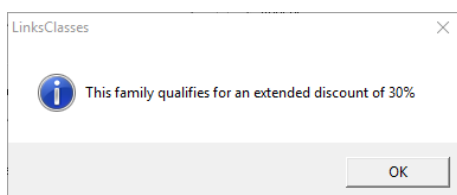
A warning message as shown above will display upon booking notifying you when a family qualifies for the Extended Family Discount. Click [OK] to apply the Extended Family Discount across all students within the family. In the example above a 10% discount is automatically applied to each student within the family.

To setup or amend the Extended Family Discount please see the Admin User Guide.

Reallocate Amounts:

The [Reallocate Accounts] button will attempt to automatically reallocate all payments against fees for all bookings in the Family.
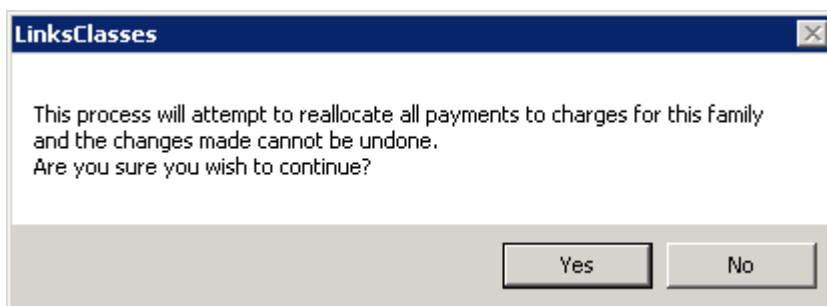
A warning message as shown above will be displayed asking if you wish to continue before completing the process as once complete it cannot be undone.

Reprinting a Receipt:

If you wish to reprint a receipt select the payment with a single mouse click on the Payments section of the Accounts/Booking tab, then click on the [Print Receipt] button.
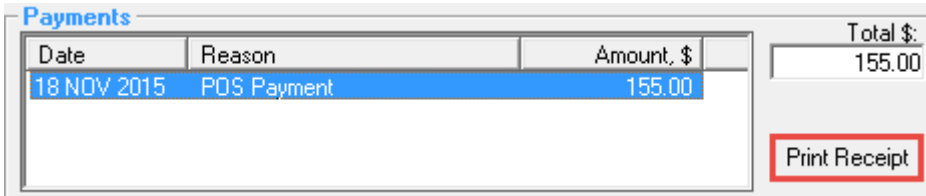
Holiday Program/Squads Tab

Bookings made for Holiday Program and Squad Class Types are displayed in the HP/Squads tab. This tab displays information relating to the holiday program and squad financial accounts and bookings.

The bookings are displayed by their Group Code in the top section of the screen. For more information regarding Group Codes please see the Admin User Guide.
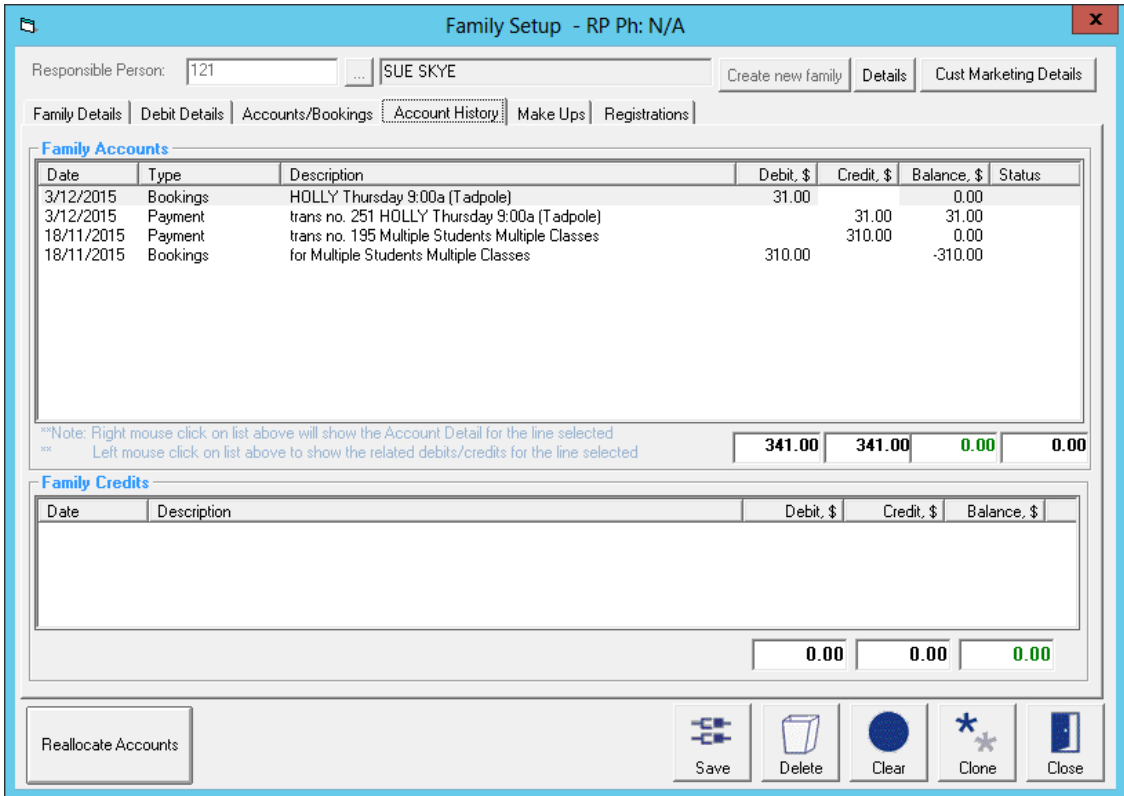
When the booking is selected, the individual booking days will display in the lower half of the screen, as shown below.
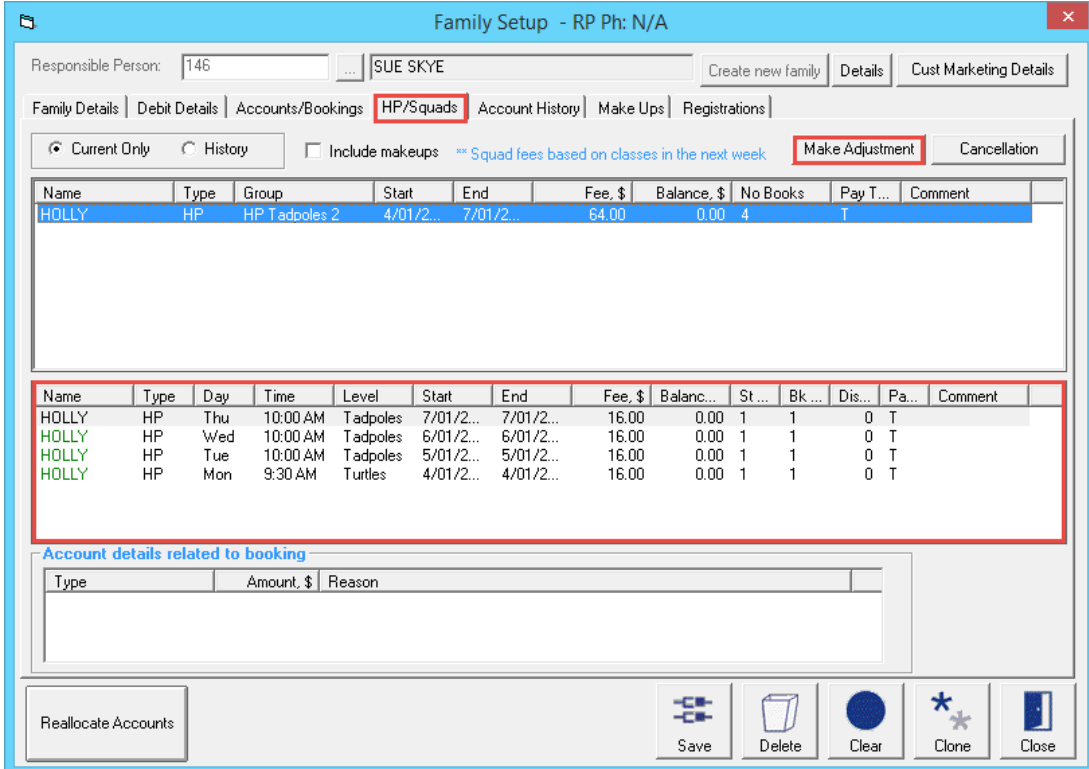
Adjustments for holiday program and/or squad bookings must be done through this screen. See the Financial Adjustments for Existing Bookings section of this document for more information.

Account History Tab

The Account History tab displays all financial transactions made against the selected family account.

Family Accounts:

Details of the transactions are listed with the amounts. By highlighting a payment line, the associated booking lines will be displayed in bold (as shown below) and vice versa. Right click on any account line to display further account details.

Family Credits:

All transactions made to or from the family credit account are listed here in the same format as the account history.

Date	Description	Debit, $	Credit, $	Balance, $
3/12/2015	Payment - transaction number 252 -		31.00	-31.00
		0.00	-31.00	31.00

Make Ups Tab

Any make up bookings made for students within the selected family are displayed here including:
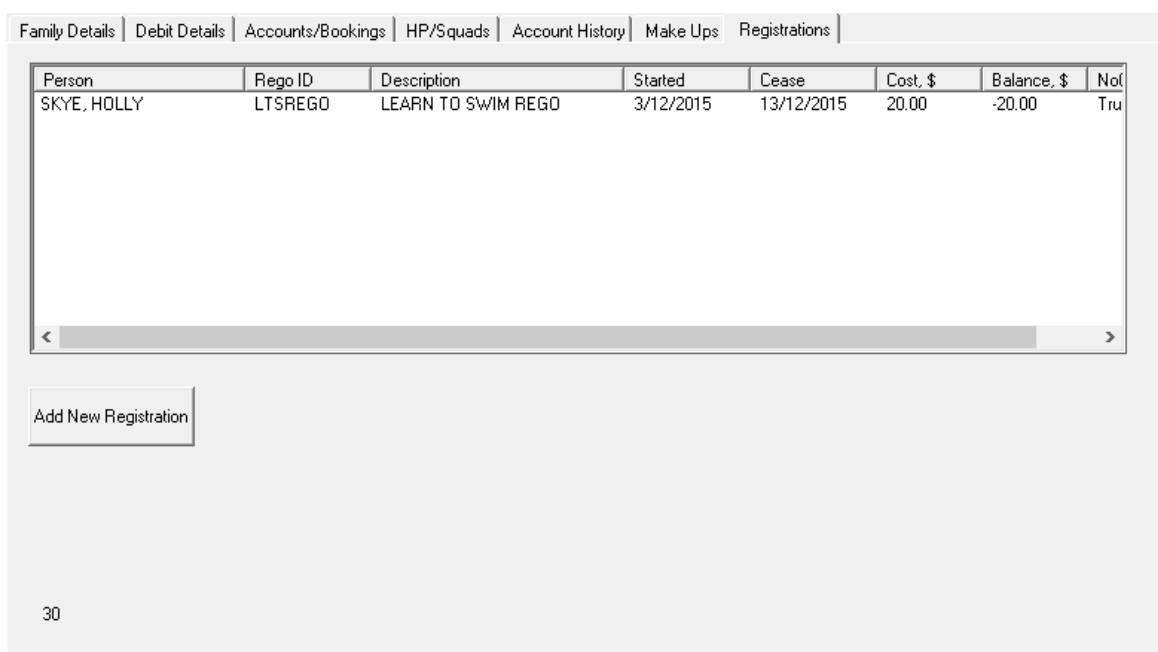
- Name of the Student
- Day
- Time
- Level
- Teacher
- Date
- Comments

Registrations Tab

The registrations tab in the family screen will display the registrations assigned to all students within the family. Information displayed will include:

- Name of the Student
- Rego ID (type of registration applied)
- Description
- Date Started
- End Date
- Cost
- Balance remaining
- Whether or not a price override was applied to the registration fee

For more details on how to add, edit or view registrations, see the Registrations section of this User Guide.

Special Family Discounts

Whilst the Special Family Discount is setup in Admin, (Admin>Classes> Discounts), the functionality it provides is seen in the Classes Module. The Special Family Discount is designed to allow users to give families another discount that is applied after all other discounts have already been applied. This is best used in the scenario whereby a responsible person is entitled to an extra discount because they are also a member of the gym.

The Special Family Discount is only allocated to families that you choose to allocate the discount to. The box must be checked within the family screen as shown below. If a term booking has already been booked then there will be no effect on the charge however if a perpetual booking exists within the family then the discount will be applied to subsequent direct debit runs.

Only staff members with the ability to 'modify a Customer account' can flag the Special Family Discount option. This is setup through Security Groups. For more information regarding Security Groups please refer to the Admin User Guide.

Student Details

Classes> Students & Families> Student Details

This screen is used to modify existing students, review student attendances, class bookings, level history and changes to direct debit fees (if booked into a perpetual class type). This screen also allows you to assign messages to students, print cards and store a student's photo.

Note: This screen is not used to book students into a class. For how to create a new student booking please refer to 'Making a Standard Class Type booking' section of this User Guide.

Bookings Tab

The bookings tab displays the bookings that have been made for the student. Details of the student's booking are shown including:

- Day
- Time
- Class Type
- Class Level
- Start and end dates
- Area
- Teacher
- Comments
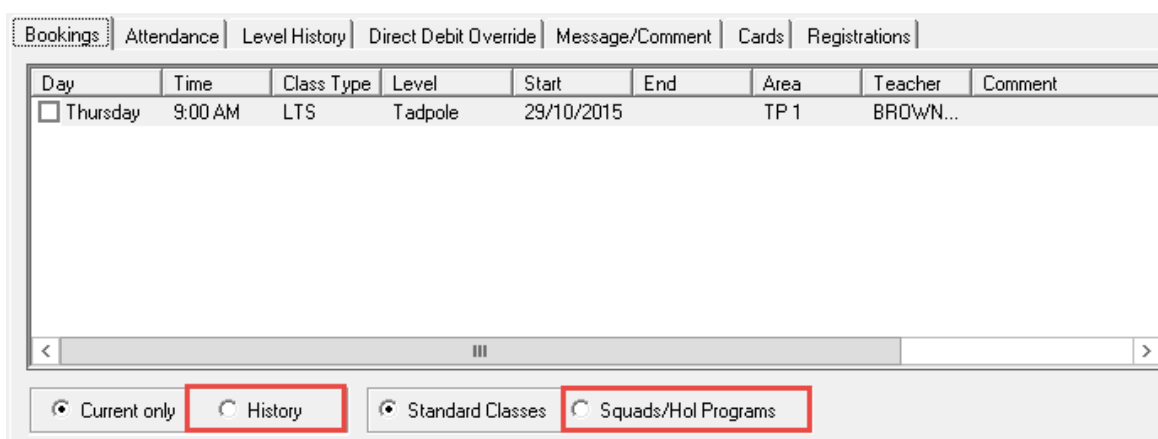
The default view is to see current Standard Class Type bookings only. Select the radio 'History' button to see all Standard Class Type bookings. Select the radio 'Squad/Hol Programs' button to see current Holiday Program and Squad Class Type bookings. Select both the 'History' and 'Squad/Hol Program' buttons to see all Holiday Program and Squad Class Type bookings.

Attendance Tab

This window displays the complete attendance record for the student. You can view a range of dates or all the dates if required. Dates can be filtered by entering in the 'from' and 'to' dates in their respective fields. Select [All Days] to view all dates for the booking.

The information is displayed in the format of 'Yes' (attended the class) and 'No' (did not attend the class).

Any cancelled lessons and make up lessons are also detailed. A student's attendance can be cancelled for a particular date from this screen by selecting the date and then clicking on [Cancel Attendance]. If a student has been placed on suspension this will also show here.

To remove the suspension highlight the dates of the suspension you wish to remove (to select multiple dates hold down Ctrl on your keyboard and click on each of the bookings) and then click on [Remove Suspension].

The [Print Attendances] button can be used to produce a record of the student's attendance.

Level History Tab

This screen displays the history of the levels of classes that the student has attended and the date of attainment in competency of that level.

It also includes the individual competencies required to complete the level. These are called skills. To view or select the associated skills highlight the level from the left hand side and click on the [Skills] button. The following screen will be displayed:
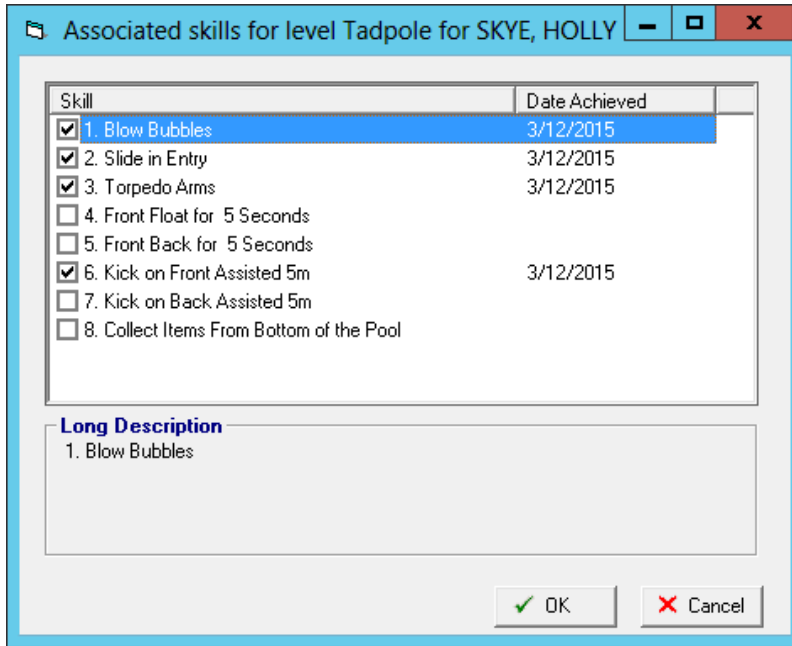
To mark off skill/s from this screen:

1. Single click in the box next to the applicable skill/s which has been achieved
2. Select [OK]
3. The date achieved will default to the current date.

Once all skills have been achieved for the level, a date the level was attained can be entered and a teacher selected. Select [Update] to make changes effective.

- **[Print Level History]** - Select this button to print a record of the student's level history
- **[Email Level History]** - Select this button to email a record of the student's level history

Direct Debit Override Tab

This window is used to modify a student's perpetual direct debit payments for any reason. These changes will affect the collection amount for the period stated and cannot be made retrospectively.

If a student has more than one booking this window will display all classes booked with a perpetual booking type. The class will display the day, time, level and scheduled fee.

- **Override** - Type in the amount to be charged for the nominated debit
- **Reason**-Type in the reason for the override
- **End Date** - If the override amount is only to affect the next debit, leave this box blank. However, if the override amount is to reflect a number of debits, select the last debit date relevant for this override
- **[Update]** -Click to save the override information. This information will then be shown alongside the class booking entry, displaying the override amount, reason and the last debit date to be overridden
- **[Clear]** -Click to clear the override information entered
- **[Clear All]** -Click to clear the override information that has been updated and placed alongside the booking entry line

Note: If a booking is overridden and then moved the override will be carried over to the new booking.

Overriding Squad Direct Debit Payments:

To override a squad direct debit payment, ensure the Squads/Hol Program radio button on the Bookings tab is selected before clicking on the Direct Debit Override tab.

Note: That the total direct debit payment is split between all classes booked into. Thus the override is for that particular class. To override the total direct debit amount, you must add an override to each class.

Message/Comments Tab

There may be times when you wish to have a message or comment display when a student attends the centre.

- **Messages** - Entries in this field are displayed at POS when the customer attends the facility
- **Comments** -Entries in this field are retained within the student record and can be printed on some timetables

Cards Tab

This window displays the cards that have been issued for this student. Pre printed cards can be allocated to students through the [Student Details] button. Each card that is printed is issued with a card number that is linked to the Student's ID. Every time a new card is printed for a student, the new card cancels out the previous card by placing a cease date alongside the previous card. Therefore making the card invalid and not allowing the student to register a visit.

Note: Students who are booked into more than one class can use the one card.

- **[Print Card]** - This button is to be used if the facility will print their own cards and are not using pre printed cards. When selecting this icon a new card number is instantaneously created and attached to the Student ID. For more information on how to setup cards please see the Admin User Guide. An example of a card that can be setup is shown below.

LUKE SKYWALKER

22227090

*Thank you for
swimming at XXX*

From this preview window you can print the card or close the preview. If closing the preview the new card number displayed will automatically take effect. Please refer to the Admin User Guide for further information on setting up card layouts.

User Defined Tab

For setup of User Defined Fields, see Admin> Site> Site Setup> Classes.

Allocating User Defined Fields

The User Defined tab contains a Table Maintenance field and date field as specified by the setup in the Admin Module. For more information on Table Maintenance please refer to the Admin User Guide.

Click on the […] button to select a maintenance value (in the example below Level History). Then select a date as required and save the student details.

Note: There is no history of user defined fields.
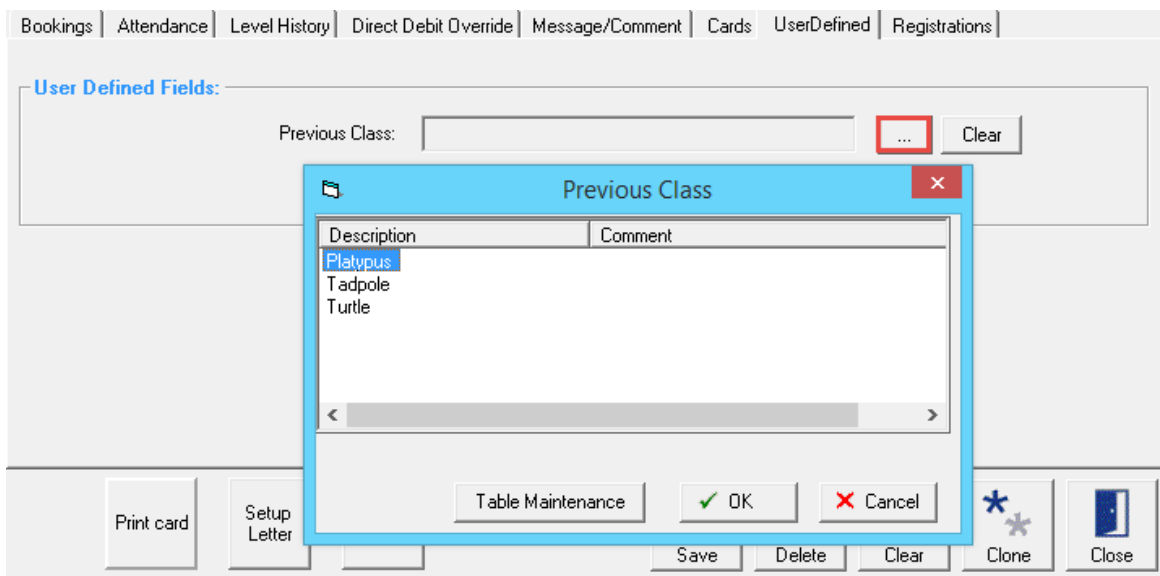
Financial Adjustments for Existing Bookings

Classes> Students & Families> Families

How to make an adjustment for a Standard Class Type:

1.   Select the booking line to be adjusted with a single mouse click

2.   Click on [Make Adjustment], the following screen will appear:

3. Select to either increase or decrease the amount owing
4. Enter in the amount to be adjusted
5. Select a reason from the drop down menu and add any additional comments if required
6. Click [OK] to finalise

How to make an adjustment for a Holiday Program or Squad Class Type:

1. Select the applicable student's holiday program or squad booking in the top section
2. From the bottom section, select the class requiring the adjustment (multiple adjustments may need to be completed to each of the applicable bookings)
3. Click on [Make Adjustment] the following screen will appear:

4. Select to either increase or decrease the amount owing
5. Enter the amount to be adjusted
6. Select a reason from the drop down menu and add any additional comments if required
7. Click[OK] to finalise

Classes> Classes> Visual Scheduler

A booking is moved through the Visual Scheduler by one of two methods. These are listed below:

1. Move Booking Function
2. Drag and Drop Function

The move booking function allows a current booking to effectively be cancelled and a new booking made in the one process. The system also allocates the fees previously paid to the new booking.

Example:

Louise is enrolled in a 10 week term and $90.00 is paid for this term ($9 per class).

After the 2nd week of classes Louise moves to another class.

Upon moving $18.00 is allocated to the original booking to cover the cost of the first two classes.
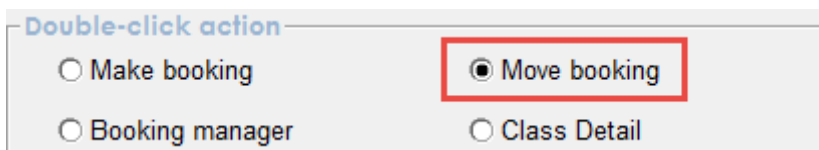
$72.00 is then returned and allocated to the new booking because the new booking is from Week 3 onwards. Fees for the new booking total $72.00.

This allows us to accurately view bookings, history of classes and allocations of fees.

How to Move a Booking using Move Booking Function

This method can be used for both Standard and Squad Class Types. It should be noted that you cannot move student's between Standard, Squad and Holiday Program Class Types.

1. Open the Visual Scheduler; Classes> Classes> Visual Scheduler
2. Select 'Move Booking' by either of the following methods:
    a. Select 'Move Booking' as the double-click action, and double click on the class you wish to move to
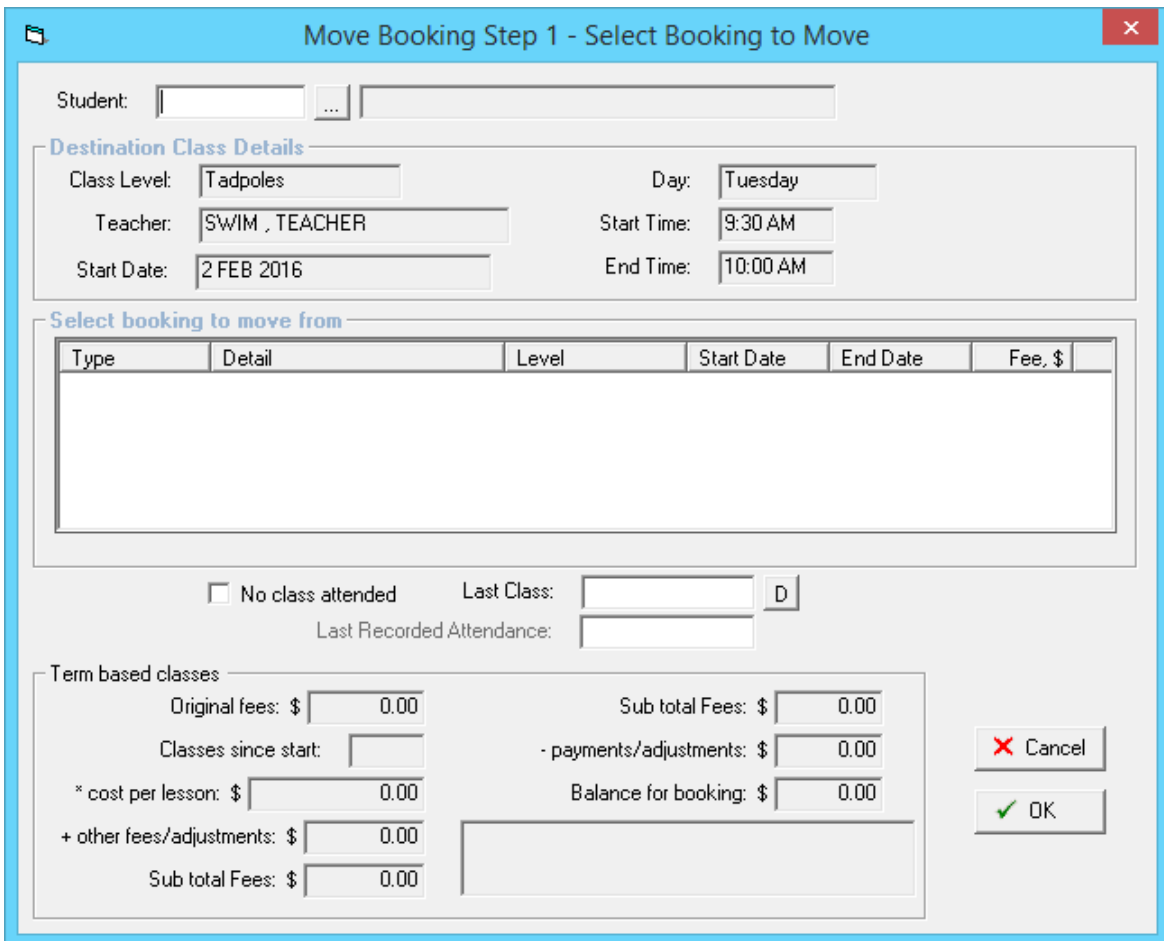
    b. Right click on the class you wish to move to and select 'Move Booking'

3. The following screen will appear:

4. Click on the […] buttonand select the student you wish to move

The 'Destination Class Details' shows the class you wish the student to move to.

Note: The start date is the date you have chosen in the Visual Scheduler and the destination class is also the class you selected in the Visual Scheduler.

5. Next select the booking you wish to move the student from
   a. In the 'Select booking to move form' window click on the required class to highlight
   b. Rememberthat the student may have multiple booking for different Class Types make sure you select the correct class

6. Select the date of the 'Last Class' for the previous booking

Note: This date is extremely important to ensure the student is not double booked for the week unwittingly. Ensure that the date is the week prior to the new class' start date above.

If the student will never attend the first class and you wish to completely cancel the booking, flag the 'No class attended' option, shown below.

Once the 'Last Class' date is entered the fees are re-calculated for term based bookings only.

Note: Allocation of fees on the left hand side indicates fee allocation for the original booking and the right hand side shows the fee allocation being brought forward for the new booking.

7. Click on [OK], the Create Student Booking screen will appear to confirm details of the new booking.

Pay close attention to the Fees section:

Move Booking Step 2 - Create New Booking

Destination Class Details

Class Level: Tadpoles	Day: Tuesday	Start Time: 9:30 AM
Teacher: SWIM , TEACHER		End Time: 10:00 AM
Area: MP 1		

Booking Type
- ● Term ☐ Direct debit
- ○ Perpetual
- ○ Makeup
- ○ Casual

Term Details
Term: Term 1 2016
Begins: 1 FEB 2016
Ends: 17 APR 2016

Student Details
Student No.: 150   Age:
Name: NEW, EMILY
Responsible Person: NEW, TONY

Booking Details
From: 9 FEB 2016 D   To: 12 APR 2016 D
No. of lessons: 10
Consultant: 1   TRAINER,TRAINER

Fees

Discounts/Concessions
Discount: 0 %
(first child, first class)
☐ Concession

- Refund: $ 160.00
Joining fee: $ 0.00
+ Booking fee: $ 160.00
- Discount: $ 0.00

[Pay now]

= Due: $ 0.00   Family Credit: $ 0.00
Amount in Credit: $ Amount to pay: $ 0.00

Vacancy Information
Fe Fe Fe Mc Mc Mc Mc Mc Ap Ap
9 16 23 1 8 15 22 29 5 12

■ = Vacancy   ■ = Fully Booked
■ = Filled by Make Up/Trial/Held/Susp   ■ = Public Holiday

[Customer Details] [✓ OK] [✗ Cancel]

Note: That the balance of the original booking is brought forward as a refund and the balance due for the new booking is $0.00.

The balance due may not be $0.00 for the following reasons:

a. The student has been double booked (original booking and new booking) within the one week, creating a charge of an extra lesson
b. A week has been skipped between the original booking and new booking, giving a refund to family credit
c. The original booking may have taken into account an upcoming public holiday which is no longer relevant for the new booking – an additional lesson will be charged
d. The new booking may fall on a public holiday that the original booking did not – a refund of one lesson will go into family credit

8. Click on [OK] to confirm and complete the new booking

Note: If the new booking is cancelled at the point of the Create Student Booking screen, the original booking will have been cancelled and will need to be rebooked.

How to Move a Booking using Drag and Drop Function

Drag and drop move function can be used on all Class Types and must be used for Holiday Program Class Types.
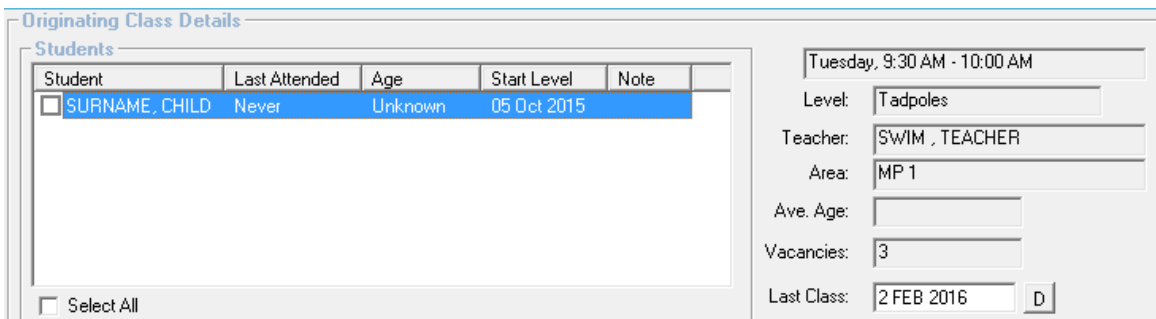
1. Open the Visual Scheduler; Classes> Classes> Visual Scheduler
2. Select 'Move Booking' by either of the following methods:
   a. Click on the class of the original booking and drag and drop to the class of the new booking (on the date you wish the new booking to start)
   b. Right click on the class of the original booking and select 'Move From', right click on the class of the new booking (on the date you wish the new booking to start) and select 'Move To'
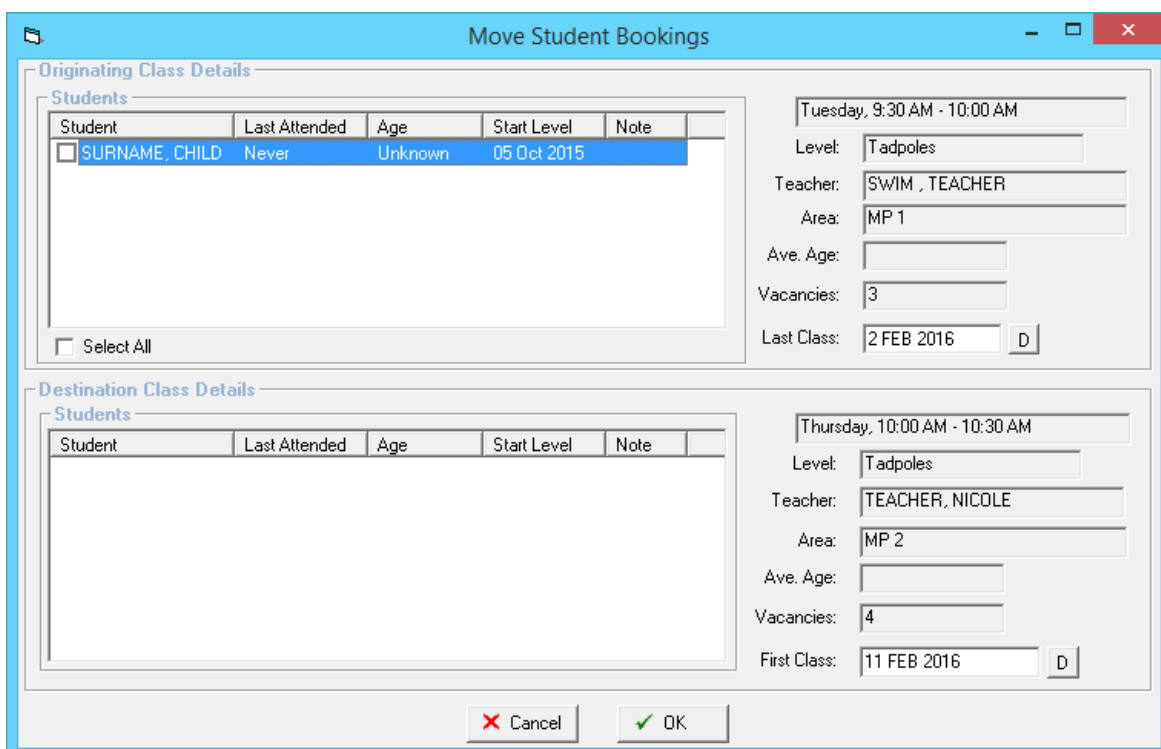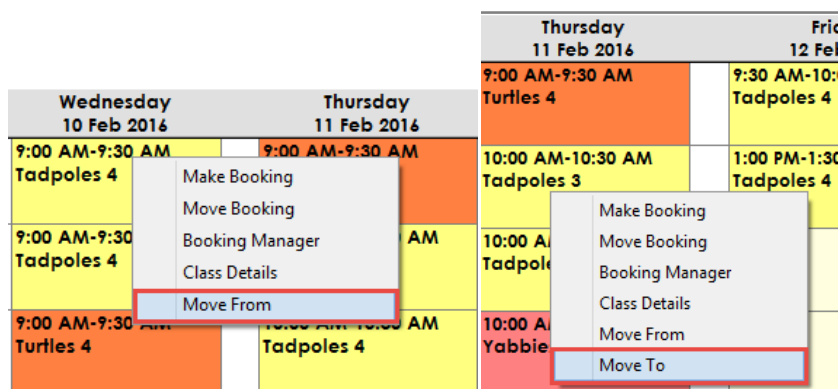
3. The Move Student Bookings screen will be displayed.
   The top section shows the 'Originating Class Details' and the bottom section shows the 'Destination Class Details'.
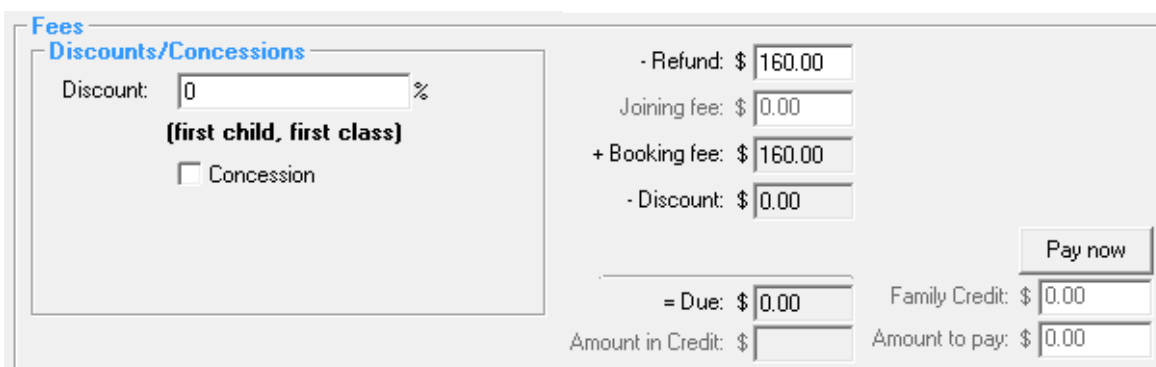
Note: The dates of the 'Last Class' and the 'First Class' default to subsequent weeks. These can be adjusted if necessary.

4. Select the student/s to be moved from the Originating Class Details> Students section. There is also the option to 'Select All' if necessary.

5. Click on[OK], the Create Student Booking screen will appear to confirm details of the new booking

   Pay close attention to the Fees section:

Note: That the balance of the original booking is brought forward as a refund and the balance due for the new booking is $0.00.

The balance due may not be $0.00 for the following reasons:

   a. The student has been double booked (original booking and new booking) within the one week, creating a charge of an extra lesson
   b. A week has been skipped between the original booking and new booking, giving a refund to family credit
   c. The original booking may have taken into account an upcoming public holiday which is no longer relevant for the new booking – an additional lesson will be charged
   d. The new booking may fall on a public holiday that the original booking did not – a refund of one lesson will go into family credit

6. Click on [OK] to confirm and complete the new booking
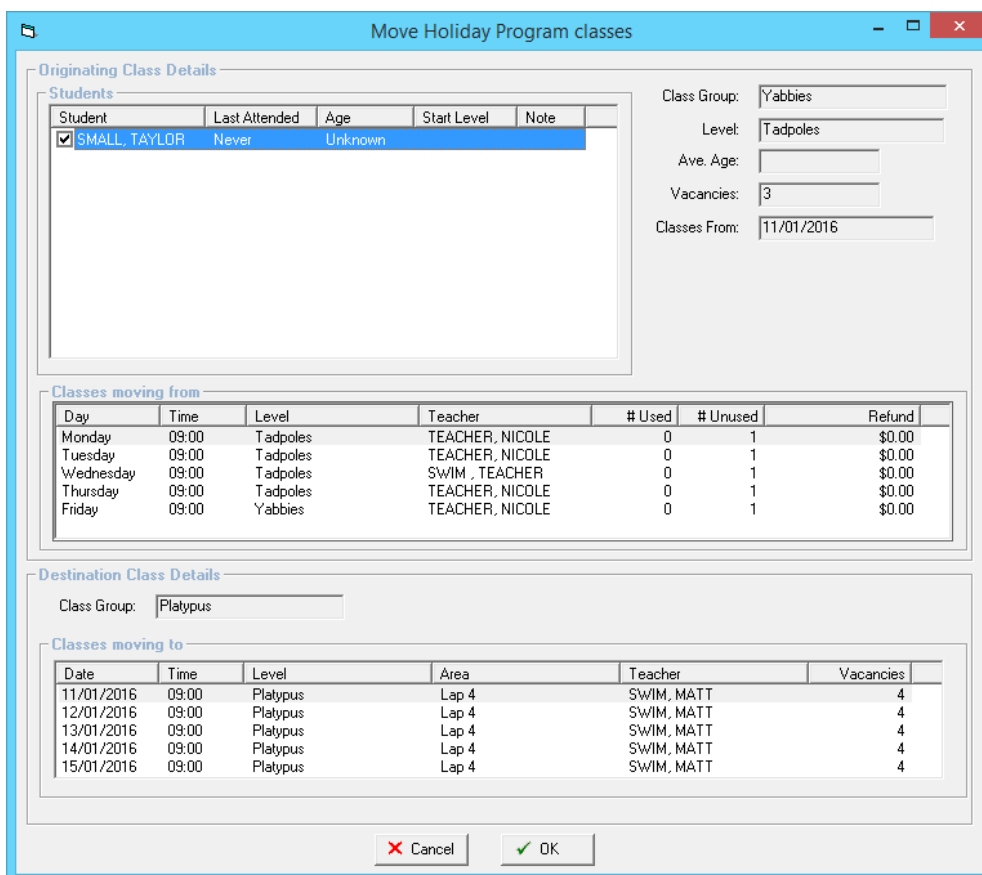
Note: If the new booking is cancelled at the point of the Create Student Booking screen, the original booking will have been cancelled and will need to be rebooked.

Moving a Holiday Program Booking

Classes> Classes> Visual Scheduler

To move a holiday program booking, the drop and drag method must be used. Students can be moved from term to term however, cannot be moved across different Class Types.

1. Locate the class that the student is currently booked into and left mouse click
2. Holding down the left mouse click drag and drop to the class they wish to move into. The Move Holiday Program classes screen will appear:

Tick the box next to the student you wish to move.

3. Click [OK], to display the Create New Bookings screen

4. Complete the booking as per Making a Holiday Program Class Type Booking section in this document

Note: The dates of the move booking, will be determined by the dates of classes selected during the drag and drop process.
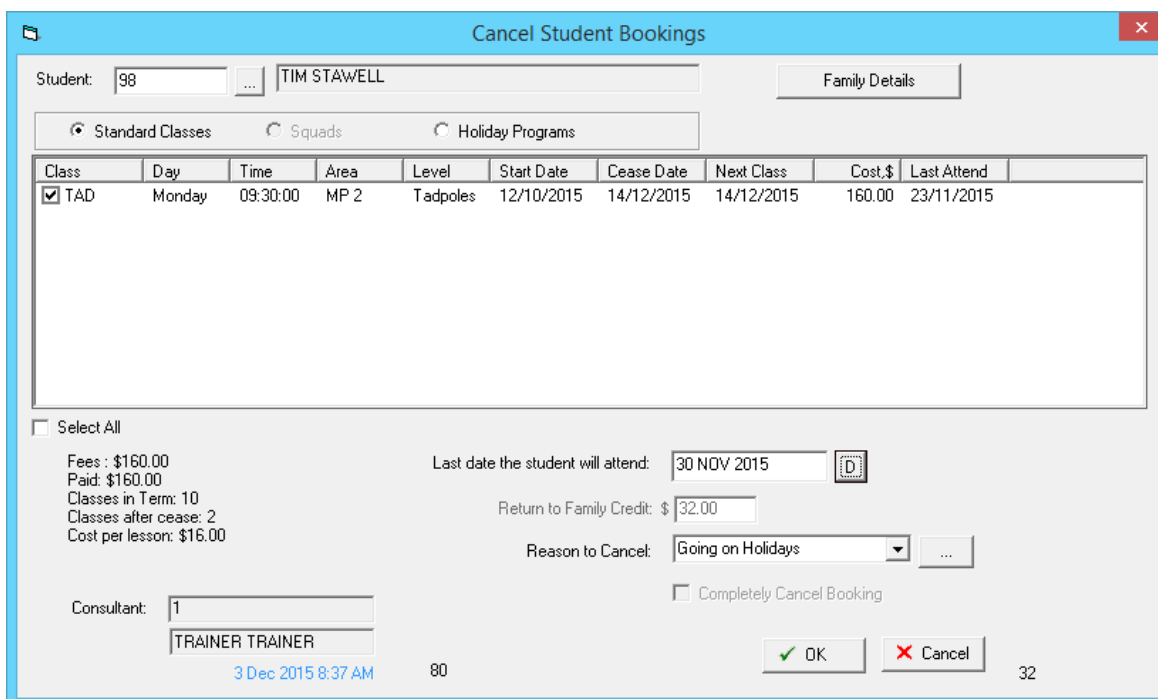
Cancelling a Student Booking

Classes> Classes> Cancel Student Booking

If you wish to cancel a student who is currently enrolled in a class and does not want to move to another class this option allows you to do so.

It is possible to record the staff member cancelling (and creating) bookings depending on the setup in the Admin Module. This information is kept with each booking and can be viewed through the Student or Family screens.

To cancel a student booking:

1. Open the Cancel Student Bookings screen; Classes> Classes> Cancel Student Booking
2. Search for the student by either:
   a. Typing their last name and hitting enter
   b. Typing their Customer ID and hitting enter
   c. Scan their card
   d. Selecting the […] button
3. Select the booking or bookings to be cancelled, there is an option to 'Select All'
4. Select the date of the last class the student will attend, if applicable, a rebate or charge will be returned to family credit.
5. Select a reason for cancellation from the drop down menu
6. Click [OK] to finalise

Note: Cancellation reasons can be added or amended through Table Maintenance.
Please refer to the Admin User Guide for more information regarding Table Maintenance.

Rebate Amount for Paid Bookings
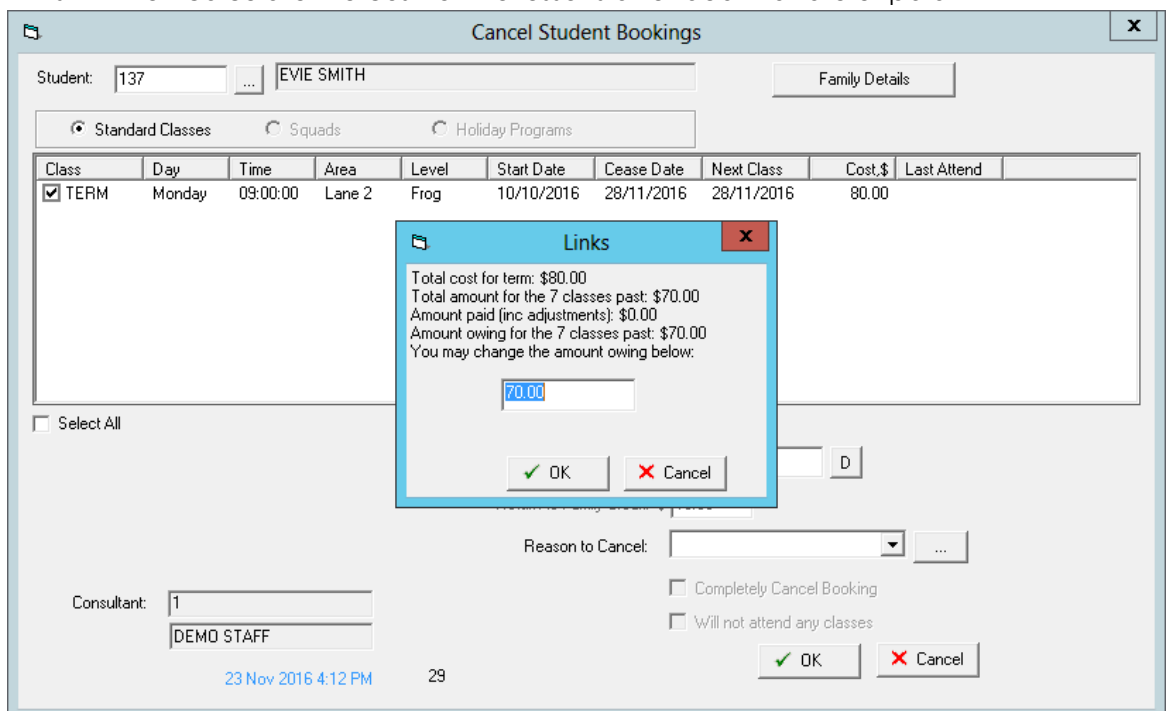
Links will automatically calculate how much is to be refunded based on the number of paid lessons left in the term.

Note: This only affects term bookings. Perpetual (direct debt) bookings will have a default of $0.00 to return to Family Credit; however an amount can be entered if required.
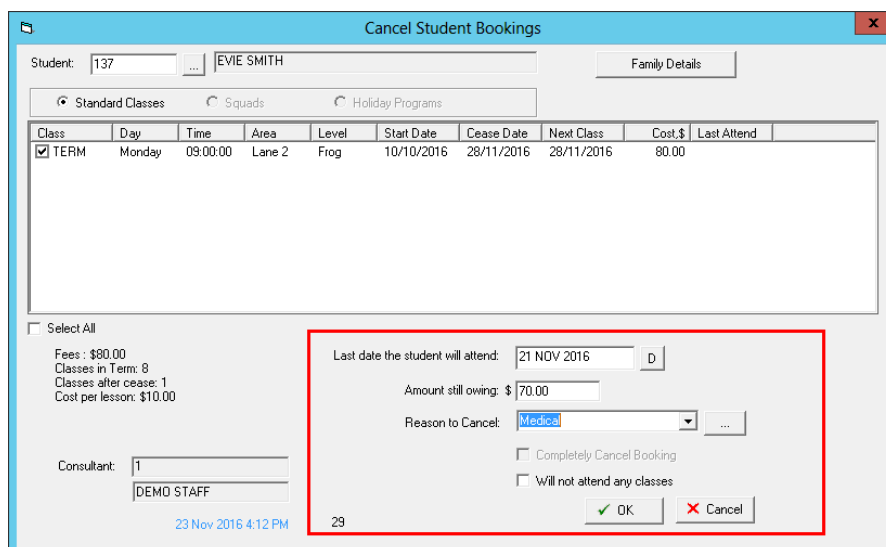
Rebate Amount for Unpaid Bookings

When a booking is unpaid, Links will attempt to charge the student for classes past and that have not been paid for.

1. Open the Cancel Student Bookings screen; Classes> Classes> Cancel Student Booking
2. Search for the student by either:
    a. Typing their last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the [...] button
3. Select the booking or bookings to be cancelled, there is an option to 'Select All'
4. Enter the last date the student will attend the class
5. Links will then calculate the cost for the lessons attended that are unpaid

6. Click [OK]
7. The 'Amount still owing' will be updated
8. Enter the 'Reason to Cancel'
9. Click [OK] to finalise

If the family owes an amount for unpaid bookings, this will appear as outstanding on the family account. This can be paid through POS at any time.

Select the 'Will not attend any classes' box is the student will not attend any lessons prior to the cancellation date.

Deleting a Student Booking Record

Classes> Classes> Cancel Student Booking

It is possible to delete a booking record providing the following two conditions are met:

1. There has never been an attendance recorded against this booking. The 'Last date the student will attend' field will display the same date as the lesson start date.
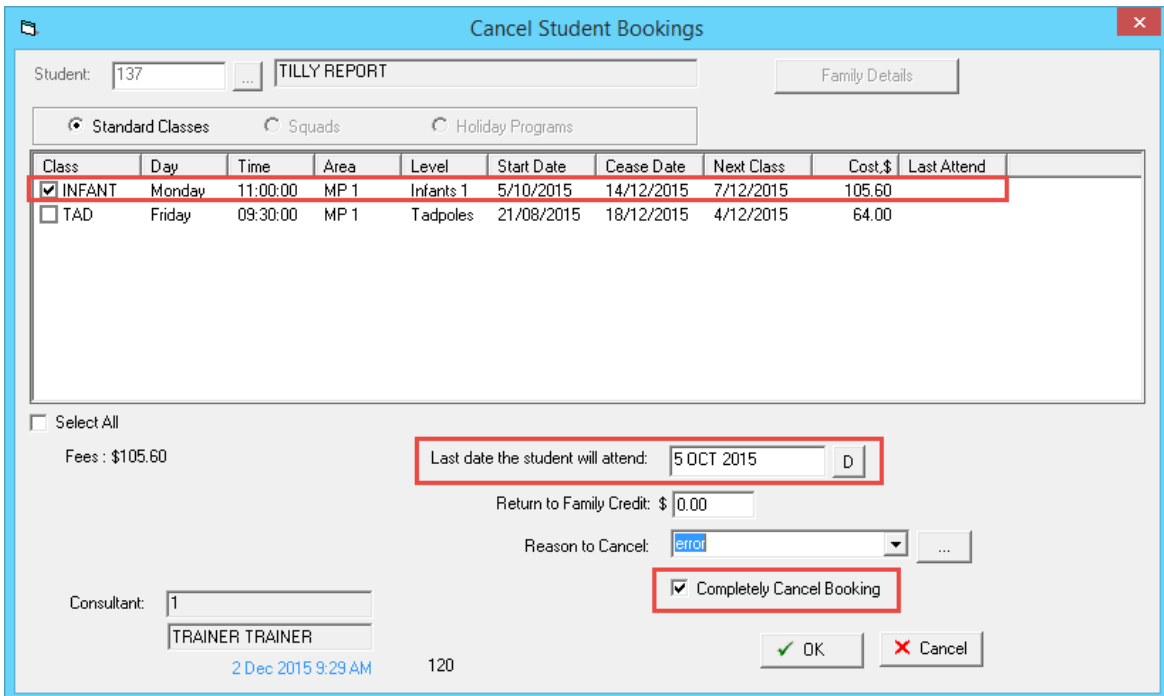
-AND-

2. No payments have been recorded against the booking

To delete a booking record:

1. Open the Cancel Student Bookings screen; Classes> Classes> Cancel Student Booking
2. Search for the student by either:
   a. Typing their last name and hitting enter
   b. Typing their Customer ID and hitting enter
   c. Scan their card
   d. Selecting the […] button
3. 'Last date the student will attend' field will default to the class start date
4. 'Return to Family Credit' field will be automatically calculated as stated above. This figure can be adjusted dependent on your organisation's policies
5. Select a cancellation reason from the drop down menu

6. Select the 'Completely Cancel Booking' tick box

7. Click [OK] and the following dialogue box will display
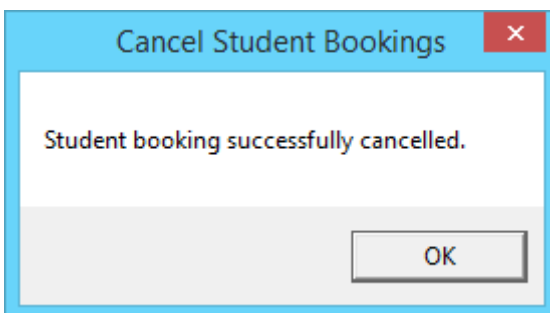
8. Select [Yes] to proceed with the cancellation or [No] to review and/or cease the cancellation process. Once the cancellation is completed the following box will appear.

Cancelling a Holiday Program Booking

Classes> Classes> Cancel Student Booking

When cancelling a holiday program, bookings within the same Class Type can be cancelled all at once.

1. Open the Cancel Student Bookings screen; Classes> Classes> Cancel Student Booking
2. Search for the student by either:
    a. Typing their last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the […] button
3. Select the 'Holiday Programs' radio button
4. Click the tick boxes alongside the classes you wish to cancel. There is also the option to 'Select All'
5. Select a reason for cancellation from the drop down box
6. Click [OK] to finalise

Note: If the Class Type is setup as 'book into all classes' you cannot cancel classes individually. The prompt shown below will warn you that all grouped classes must be cancelled at the same time. Links will then default to select all bookings. Continue with the cancellation process as per normal.
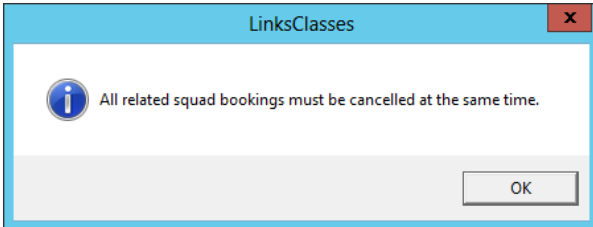
Cancelling a Squad Booking

Classes> Classes> Cancel Student Booking
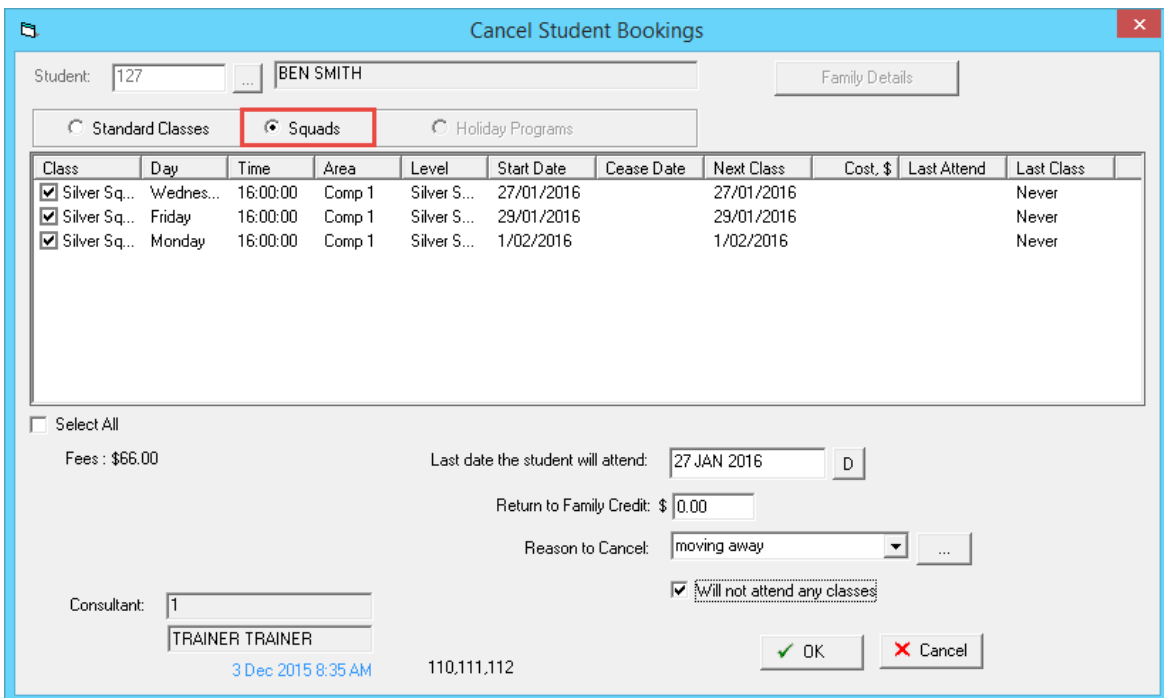
When cancelling a squad program, bookings within the same Class Type can be cancelled all at once.

To cancel a squad booking:

1. Select the 'Squad' radio button
2. Click the tick boxes alongside the classes you wish to cancel. There is also the option to 'Select All'
3. Specify the last date the student will attend, an amount to return to family credit and reason for cancellation from the drop down box. There is the option to tick the 'will not attend any classes' box to completely delete the bookings.
4. Click [OK]
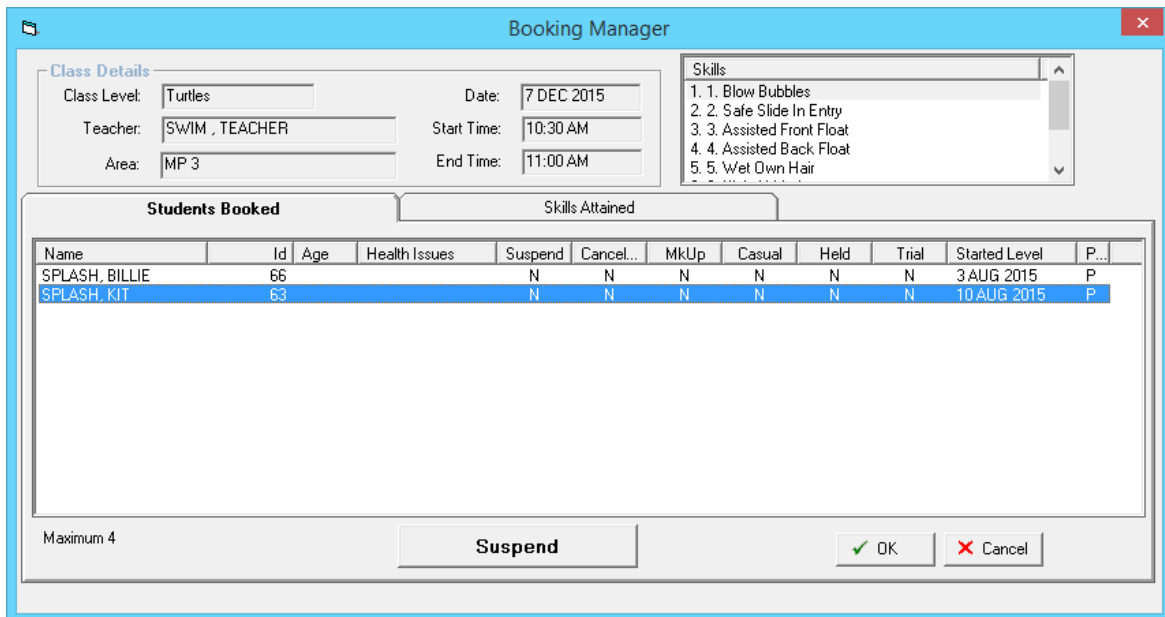
Note: As squad bookings are perpetual only, return to family credit amount will default to $0.00. If credit is to be returned, it should be inputted at the time of cancellation.

Suspendinga Booking
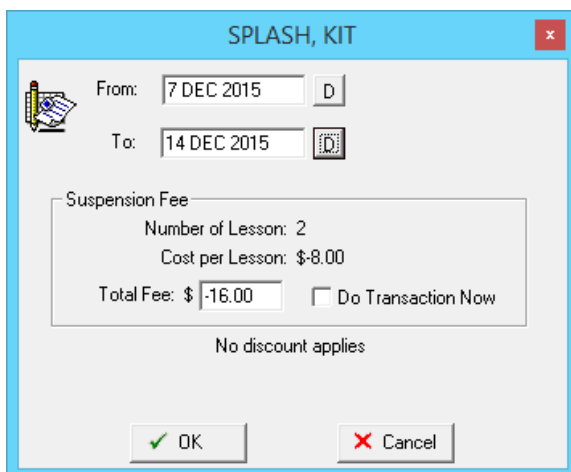
Classes> Classes> Visual Scheduler> Booking Manager

To temporarily suspend a student's booking:

1. Find the student's class in the Visual Scheduler
2. Right click on the class and select 'Booking Manager', to open the screen below:

3. Highlight the student to be suspended and select [Suspend], the following screen will appear:

4. Enter the 'From' and 'To' dates between which the suspension will occur. Thesuspension fee will be automatically calculated depending on the Class Type setup. If no fee has been setup this will default to $0.00. The suspension fee can be entered or amended at this point.
5. Select 'Do Transaction Now' to transfer the payment to POS to be processed
6. Click [OK] to finalise

Note: The above process will not change the direct debit payments for a perpetual booking. In order to amend the direct debit payment for a perpetual booking which has been suspended an override must be applied.
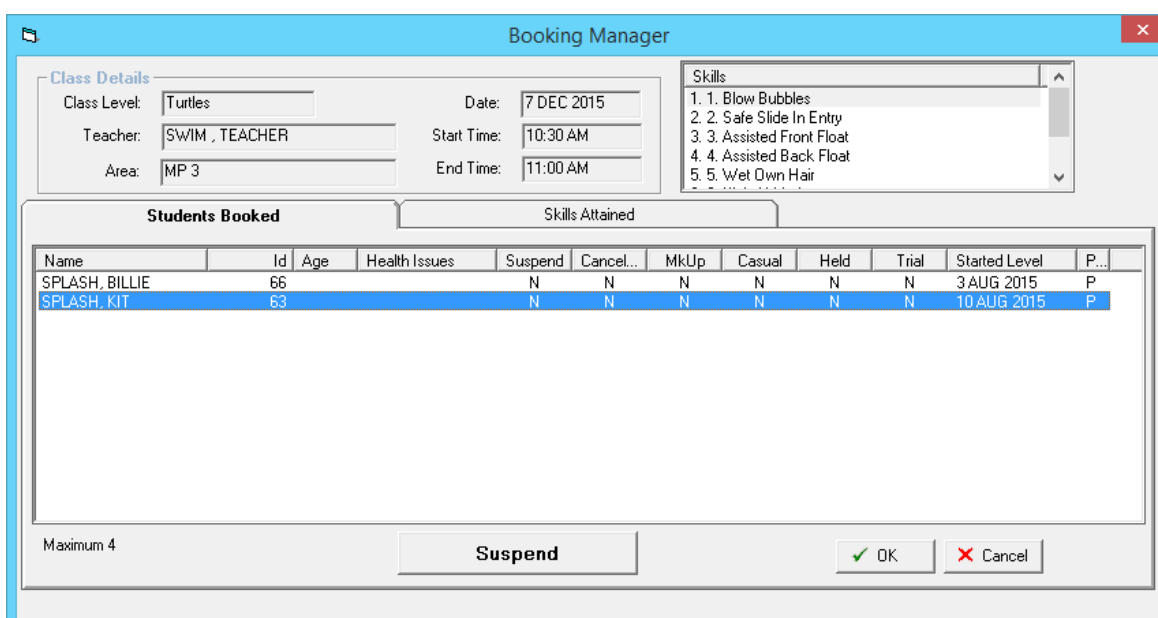
Suspending a Perpetual Student and Apply a Direct Debit Override

To suspend a perpetual student is a two-step process

- **Step 1**: Suspend the booking
- **Step 2:** Apply the Direct Debit Override

Step 1:

1. Find the student's class in the Visual Scheduler
2. Right click on the class and select 'Booking Manager', to open the screen below:

3. Highlight the student to be suspended and select [Suspend], the following screen will appear:

4. Enter the 'From' and 'To' dates between which the suspension will occur
5. Click [OK] to finalise

Step 2: Override the Direct Debit:

Now that you have suspended the student booking, If you want the student's direct debit fee to be reduced for this time you will need to apply a direct debit override.

1. Open the Student Details screen; Classes> Students & Families> Student Details
2. Search for the student by either:
    a. Typing their last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the [...] button
3. Select the Direct Debit Override tab

3. Enter the amount you want to charge the student on the next direct debit. For example if you only want to charge them for half the period then only enter this amount. Whatever amount you enter, is what they will be charged. This will override all other discounts and adjustments. For more in depth instructions see the Direct Debit Override tab section of this User Guide.
4. Enter the date you wish to apply the override until, if you only want it for the next direct debit run you can leave it blank
5. Enter a reason for the override, i.e. injury/illness
6. Click on the [Update] button and a confirmation message will appear saying how many debit periods are going to be affected by this override if correct select [Yes] if you need to make changes click [No] and you will be taken back to the previous screen to make amendments
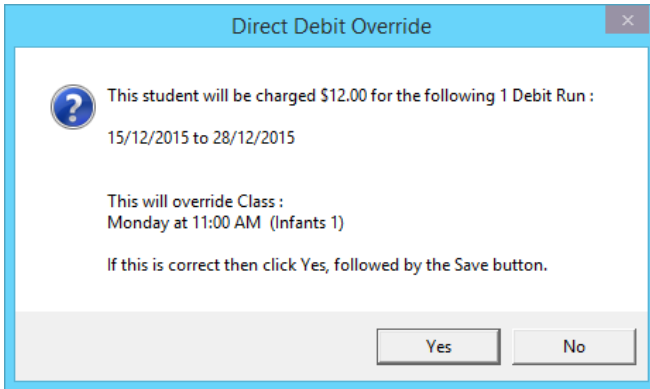
Setting up Suspension Fee:
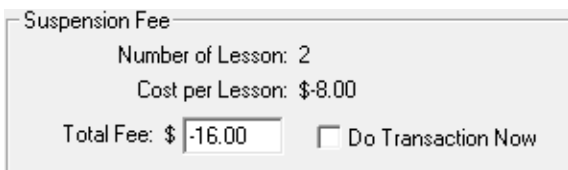
Suspension fees can be setup against Standard and Squad Class Types. For more information on this process please see the Admin User Guide.

If a suspension fee has been setup in the Class Type setup, the suspension cost per lesson and suspension total fee will be shown. The suspension fee can be positive (a charge) or negative (a refund/credit). A reminder that this is only applicable to upfront/term bookings.

Viewing Suspensions

The suspension is shown under the Attendance tab of the Student Details screen:
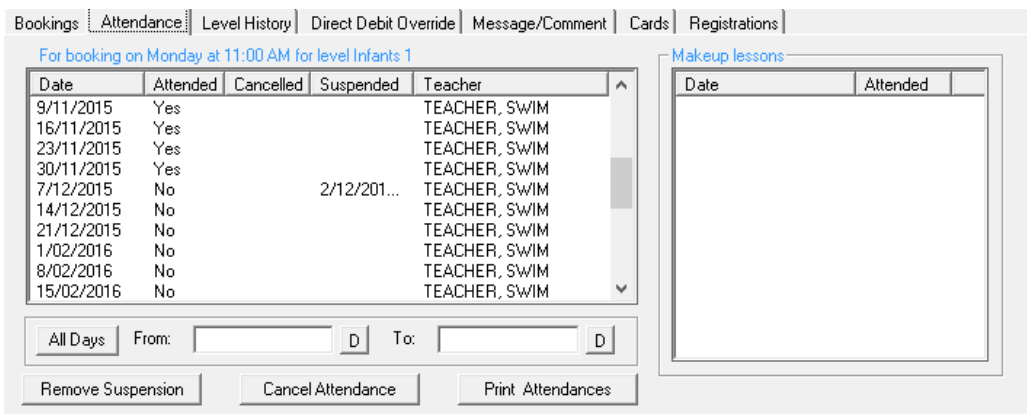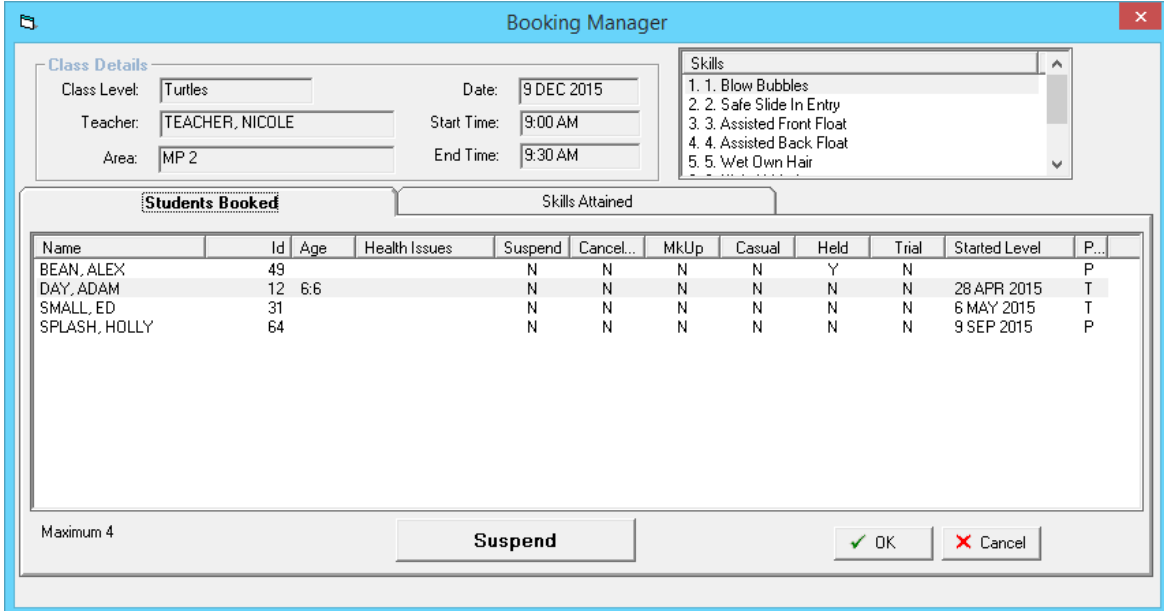
Removing Suspensions

1. Highlight the date
2. Click [Remove Suspension] button to cancel a suspension
3. If cancelling a perpetual student's suspension and an override has been applied you may want to remove the override

Booking Manager

Classes> Classes> Visual Scheduler

The class booking manager can be accessed by either of the following methods:

1. Change the double-click action to Booking Manager and double clicking on the class within the Visual Scheduler

-OR-

2. Single right click on the class within the Visual Scheduler and select Booking Manager from the options
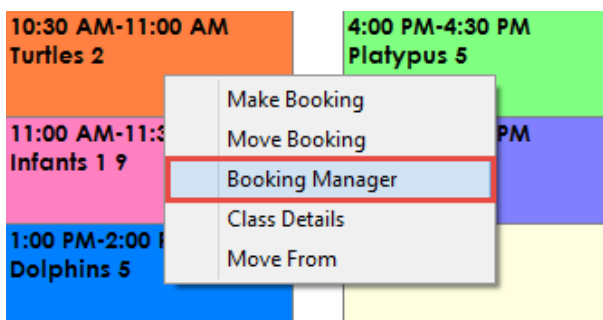
Students Booked Tab
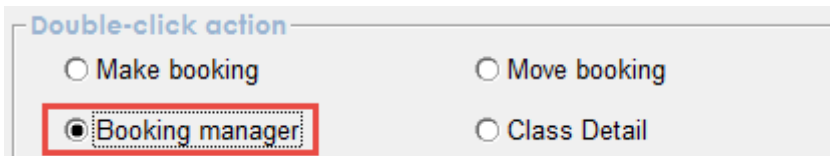
Name	Id	Age	Health Issues	Suspend	Cancel...	MkUp	Casual	Held	Trial	Started Level	P...
	Students Booked					**Skills Attained**					
BEAN, ALEX	49			N	N	N	N	Y	N		P
DAY, ADAM	12	6:6		N	N	N	N	N	N	28 APR 2015	T
SMALL, ED	31			N	N	N	N	N	N	6 MAY 2015	T
SPLASH, HOLLY	64			N	N	N	N	N	N	9 SEP 2015	P

Maximum 4   **Suspend**   ✓ OK   ✗ Cancel

Displays the following information about students:

- Name
- Customer ID
- Age (Years:Months)
- Health Issues (3 digit code)
- Suspension has been applied to the booking
- Attendance has been cancelled
- Make up booking has been made
- Casual booking has been made
- Booking has been held from waiting list
- Trial booking has been made
- Date started the Level
- Payment Type

Legend:

Y= Yes
N = No
P = Perpetual Booking
T = Term Booking

Skills Attained Tab

The Skills Attained tab displays the skills students have obtained and also allows you to record new skills attained. The skills applicable to the level are displayed in the right hand top corner of the Booking Manager screen.

To add new skills please refer to the Admin User Guide.

Daily Classes

Classes> Classes> Daily Classes

The Daily Classes screen allows you to view the day's classes by the order of their time. From this screen you can view the time of a class, the area it is held in, the students enrolled and their attendance. You can also record a visit through this screen.

- **Date** - Upon opening the Daily Classes screen Links will automatically default to the current days date. To change the date, click on the [D] to make your date selection. You can also type the desired date into the field.

After nominating a date you can then make a selection by the following filters:

- **Starting Time** - There is the option of making a selection based on class times
- **Class Filters** - The class filters allows you to filterby Class Type, Level, Area and Teacher

By clicking on the buttons you will be able to select as many options as you require by transferring them from the available to the selected side of the option box.

- **[Reset Filters]** - will remove any filters that have been applied
- **Scan Student Card** - This option can be used to record a visit for a student. Place the cursor in the field and either type in the Student ID or scan their card to record a visit. If the student does not have a card, click [Search] to find a student via the normal Links search function.
- **[Schedule]** - Switch to the Visual Scheduler
- **[Refresh]**-Refreshes the attendances
- **[Close]** -Closes the Daily Classes screen

Recording an Attendance/Cancellation or Absence

You can chose to; mark an attendance or notify an absence for the day's classes. Once you have selected the required student, left mouse click will bring up the following options:

1. Attended
2. Cancelled

3. Not present
4. Student Details

Highlight the required status and left mouse click to select the status. The class details will show this status next to the child's name.

Legend:
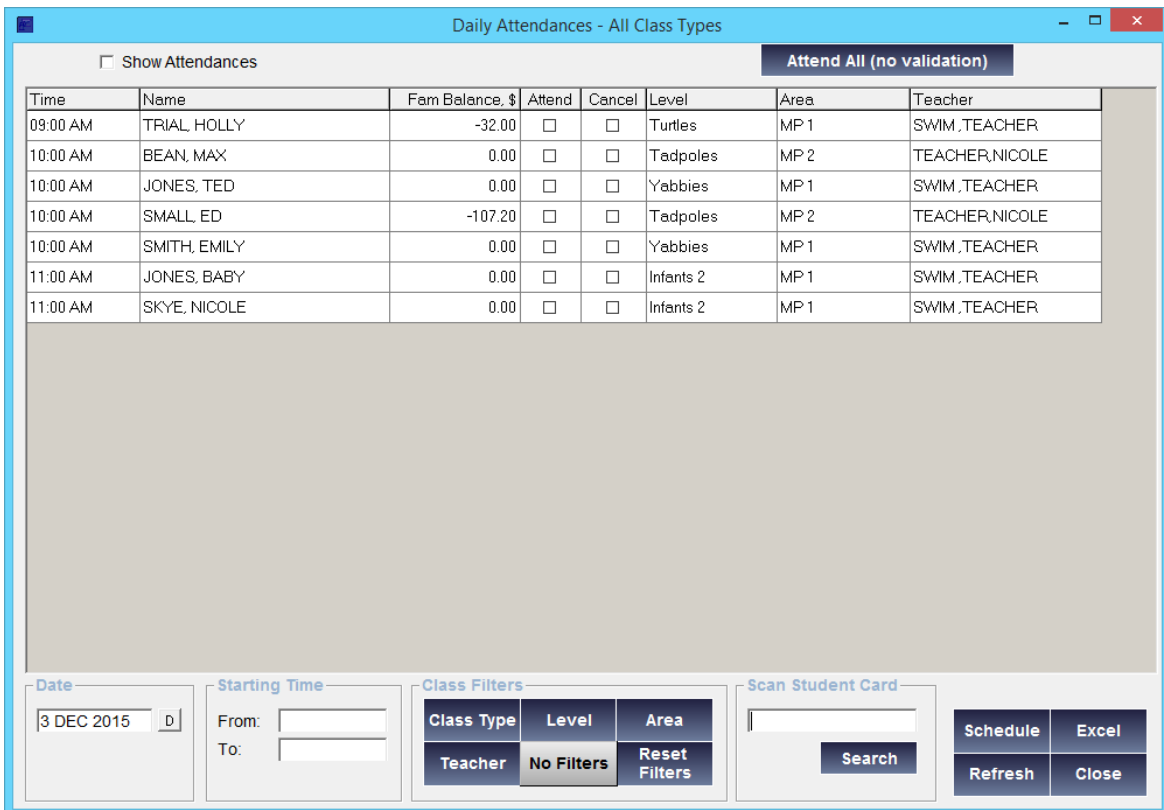
- C = Cancelled
- N = Not Present
- A = Attended

If you chose 'Attended' the normal student visit message will appear.

Daily Attendance Screen

Classes Module> Classes Menu> Daily Attendance

In addition to the Daily Classes screen you can also utilise the student Daily Attendance screen. This screen enables student's lessons to be attended and cancelled, Student's skills to be amended and viewed as well as switching to the Visual Scheduler. There is also an option to 'Attend All' if desired. The date will default to the current date, however this can be changed if required. To view the bookings in order of the time, name, area or teacher simply left mouse click on the top of the required column.

- **Time** -Displays the lesson time
- **Name** -Lists the student's surname and first name
- **Family Balance** -Indicates if the family owes any money for their bookings
- **Attend**-Select the box to attend the student for their lesson, a visit message will appear as normal
- **Cancel**-Select the box to cancel a student's attendance for the date specified
- **Level**-Displays the student's level
- **Area**-Displays the area where the class will take place
- **Teacher**-Shows who the student's teacher is

Once a student has been attended, they will disappear from the list. To bring up all students who have been attended; select 'Show Attendances'box from the top left hand corner.

Select the [Attend All (no validation)] button to attend all student bookings for the date selected.

Note: If both the attend and cancel boxes are left blank for the student, this is considered a 'No Show' for the purpose of the Absentee Analysis report. This can be found in Reporting> Classes> Status> Absentee Analysis.

Applying Filters to the Daily Attendance Screen

- **Date** - Upon opening the Daily Attendances screen Links will automatically default to the current days date. To change the date, click on the [D] to make your date selection. You can also type the desired date into the field.
  After nominating a date you can then make further selections.
- **Start Time** - There is the option of making a selection based on class times
- **Class Filters** - The class filters allows you to filterby Class Type, Level, Area and Teacher. For more information on Class Types, Levels, Areas and Teachers please refer to the Overview of the Visual Scheduler in this User Guide.
  By clicking on the buttons you will be able to select as many options as you require by transferring them from the available to the selected side of the option box.
  [Reset Filters] will remove any filters that have been applied.
- **Scan Student Card** - This option can be used to record a visit for a student. Place the cursor in the field and either type in the Student ID or scan their card to record a visit. If the student does not have a card, click [Search] to find a student via the normal Links search function
- **[Schedule]** -Switch to the Visual Scheduler
- **[Refresh]** -Refreshes the attendances
- **[Excel]** -Allows you to export to excel the Daily Attendances screen, see example below
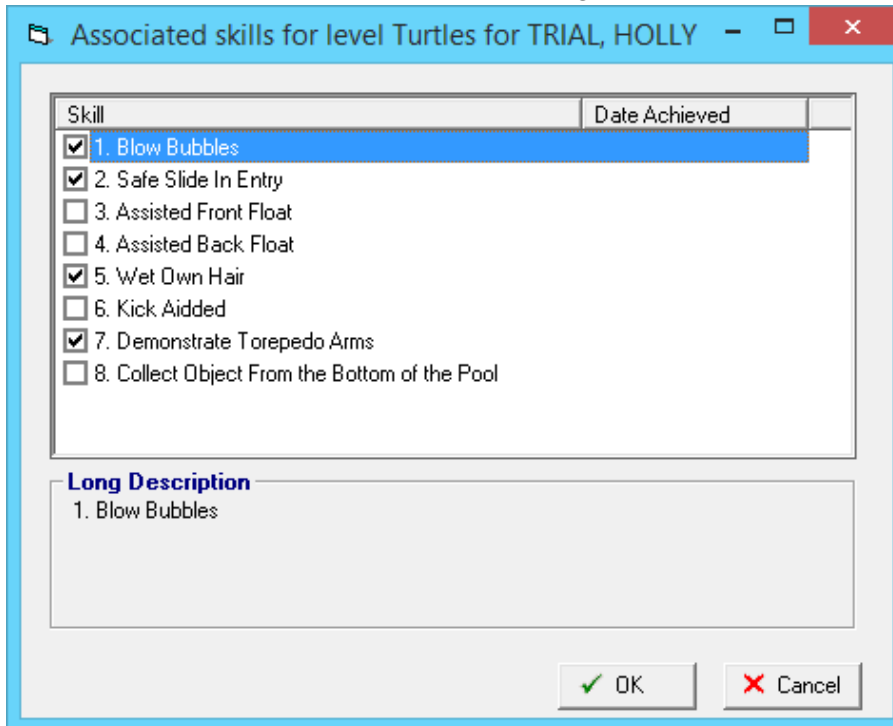
	A	B	C	D	E	F	G	H	I
1	Student ID	Time	Name	Balance	Attended	Cancelled	Level	Area	Teacher
2									
3	71	9:00 AM	TRIAL, HOLLY	-32	No	No	Turtles	MP 1	SWIM ,TEACHER
4	45	10:00 AM	BEAN, MAX	0	No	No	Tadpoles	MP 2	TEACHER,NICOLE
5	140	10:00 AM	JONES, TED	0	No	No	Yabbies	MP 1	SWIM ,TEACHER
6	31	10:00 AM	SMALL, ED	-107.2	No	No	Tadpoles	MP 2	TEACHER,NICOLE
7	142	10:00 AM	SMITH, EMILY	0	No	No	Yabbies	MP 1	SWIM ,TEACHER
8	38	11:00 AM	JONES, BABY	0	No	No	Infants 2	MP 1	SWIM ,TEACHER
9	141	11:00 AM	SKYE, NICOLE	0	No	No	Infants 2	MP 1	SWIM ,TEACHER

- **[Close]** - Closes the Daily Attendances screen

Marking Students Skills from the Daily Attendance Screen

You can also enter or view the skills for a student's current level:

1. Double click on the student and the following screen will appear:
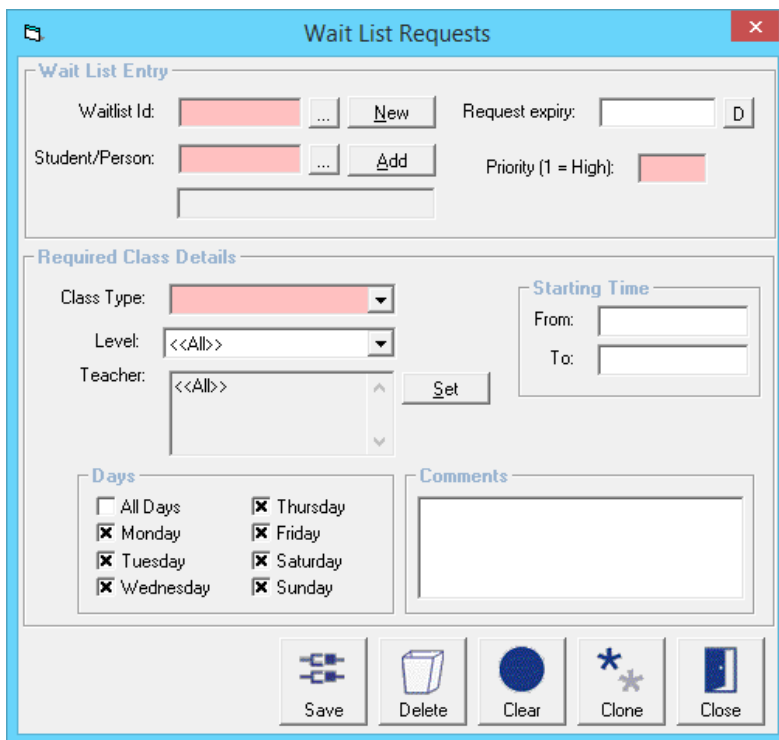
2. You can select skills that have been achieved by a single left mouse click in the box to the left of the listed skill
3. Click [OK] to save and exit the Associated Skills screen

Wait List Entries
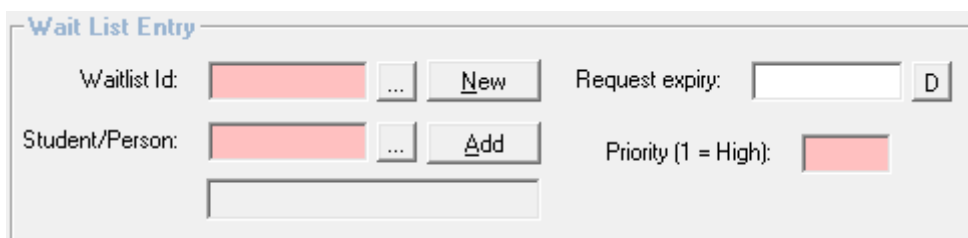
Classes> Classes> Wait List Requests

From here you can enter requests for classes that may be currently filled. Upon entering the student details into the wait list you will be able to run reports to check their status at any time.

Entering a new Wait List Entry

5. Open Wait List Request screen;Classes> Classes> Wait List Requests
6. Click [New], the Waitlist ID will automatically pre-fill with 'New'

7. Search for the student by either:
    e. Typing their Customer ID and hitting enter
    f. Scan their card
    g. Selecting the [...] button
    h. Alternatively, you can add a new student by clicking on [Add].
8. Select a date for the request to expire, leave blank if you do not wish for the request to expire
9. Enter a priority between 1 and 9 where 1 is the highest. Links will default to 1.

10. Select the Class Type and level from the drop down menus. There is also the option to specify a teacher and starting time. To specify a teacher click [Set]. To set a time frame enter the applicable times in the 'From' and/or 'To' fields.
11. Select the day/s required by selecting the box next to the day listed
12. Enter in any required comments. Comments will appear on reports and may include; "please notify parent on work number if suitable class found" or "only call if a spot is also found for a sibling".
13. Click on the [Save] icon to finalise this request. The entry will now be saved and a Wait List ID number created. This can be used to search for the request at any time.

View Student Wait List

Classes> Classes> View Student Wait List

This screen allows you to view students who are on the waiting list and:

- Book student/s into the required class in addition to their current booking
- Create a new booking for student's not yet enrolled
- Move a student from their current booking to a class they have been waiting for
- Place a class vacancy on hold for a student
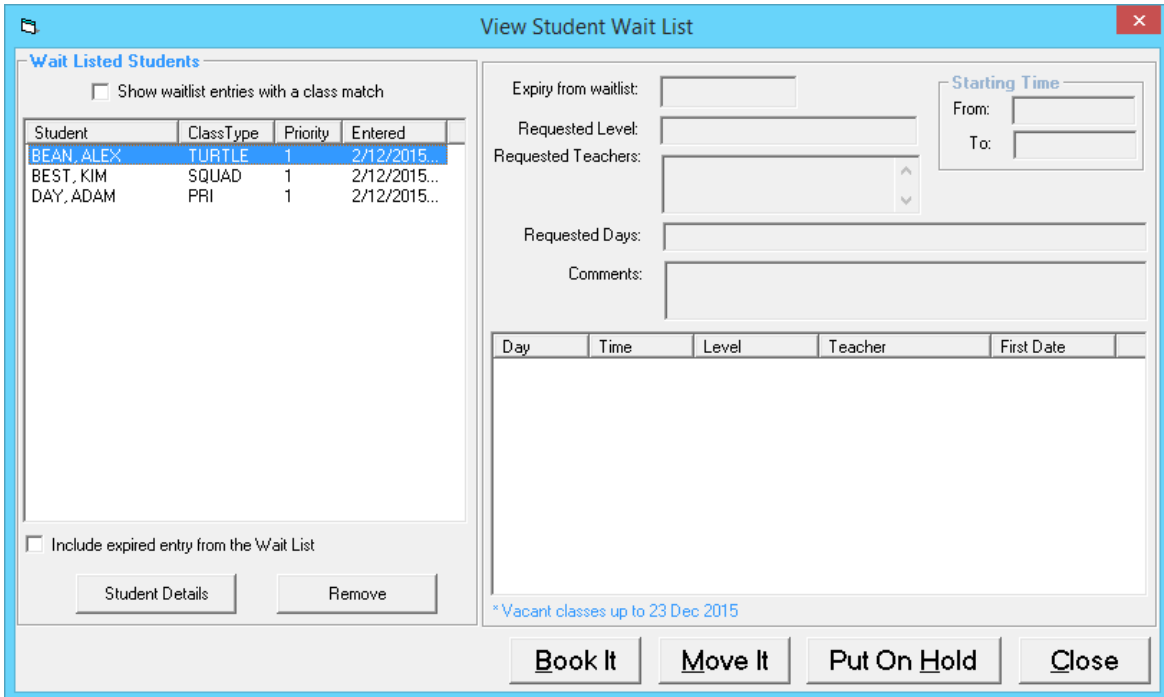
Upon highlighting the required student from the left hand side, class matches will appear on the bottom right hand part of the screen, as demonstrated below:
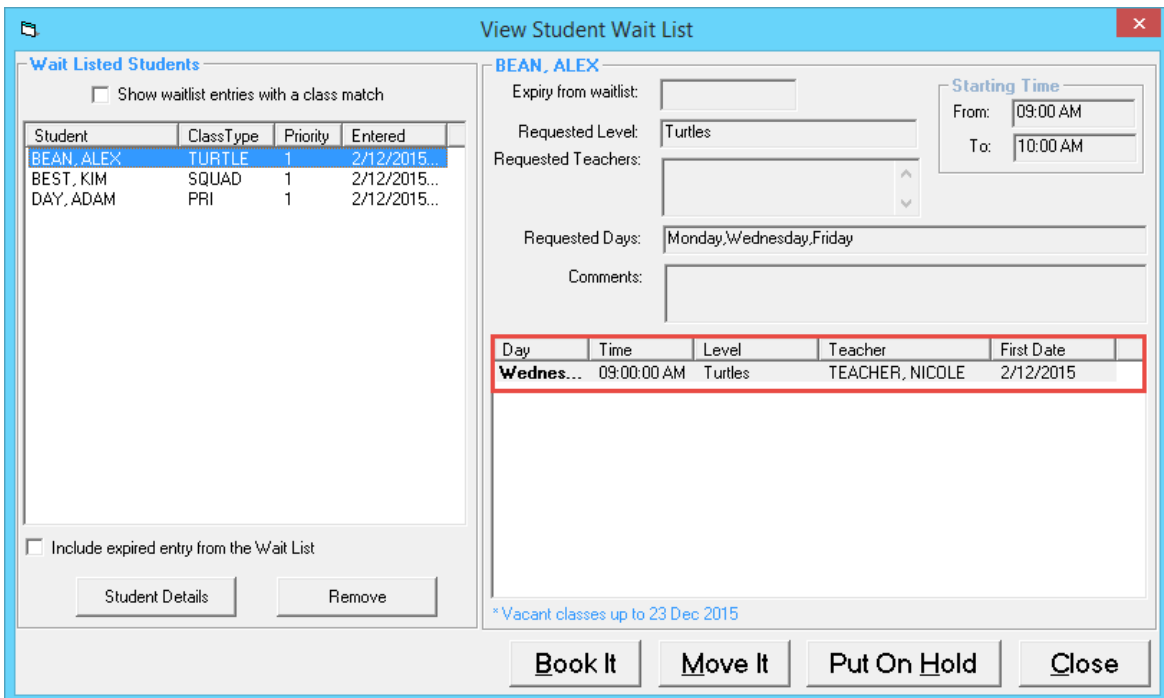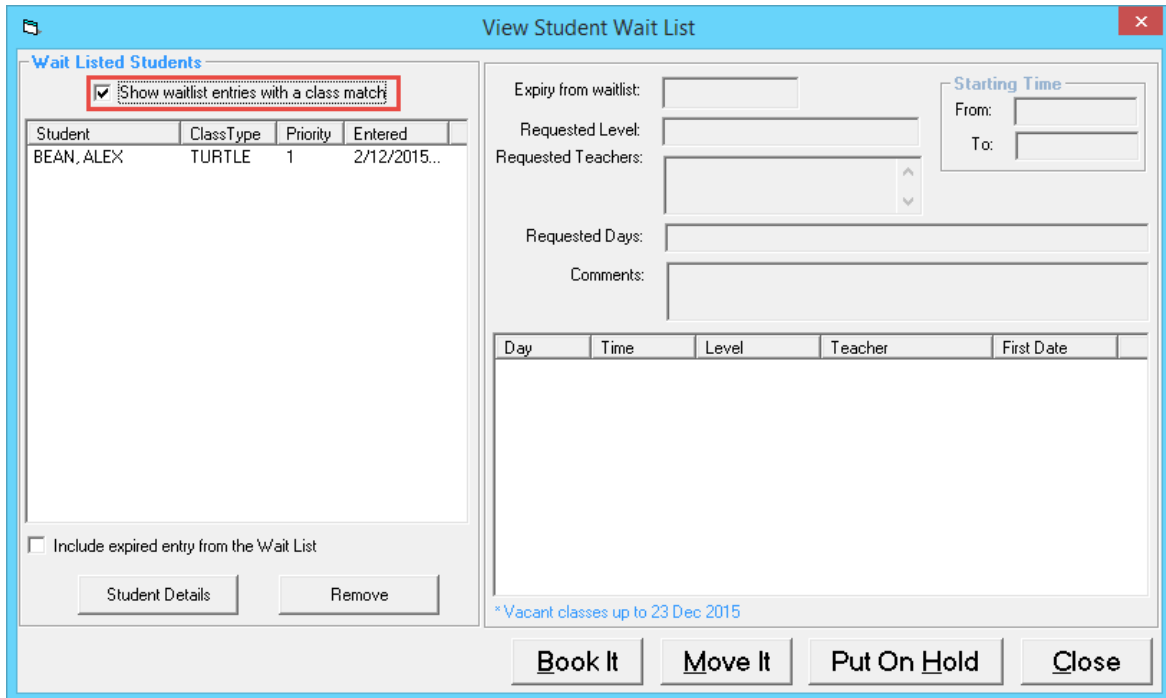
Student Details screen can be viewed by double clicking on the student's name on the left.

Displaying Waitlist Entries with a Match

This process will allow you to display only those waitlist entries that have an available match. By default all waitlist entries will be displayed.

1. Open 'View Student Wait List' screen; Classes> Classes> View Student Wait List
2. Select the check box 'Show waitlist entries with a class match'

Once a class match has been found you can choose to make a new booking, move an existing booking or place the vacancy on hold.

Displaying Expired Waitlist Requests

This will allow you to display any waitlist entries which have since expired:

1. Open 'View Student Wait List' screen; Classes> Classes> View Student Wait List
2. Select the check box 'Include expired entry from the Wait List'

Deleting a Waitlist Request

1. Open 'View Student Wait List' screen; Classes> Classes> View Student Wait List
2. Highlight the waitlist request to be removed and click [Remove] button

Booking a Student from the Wait List
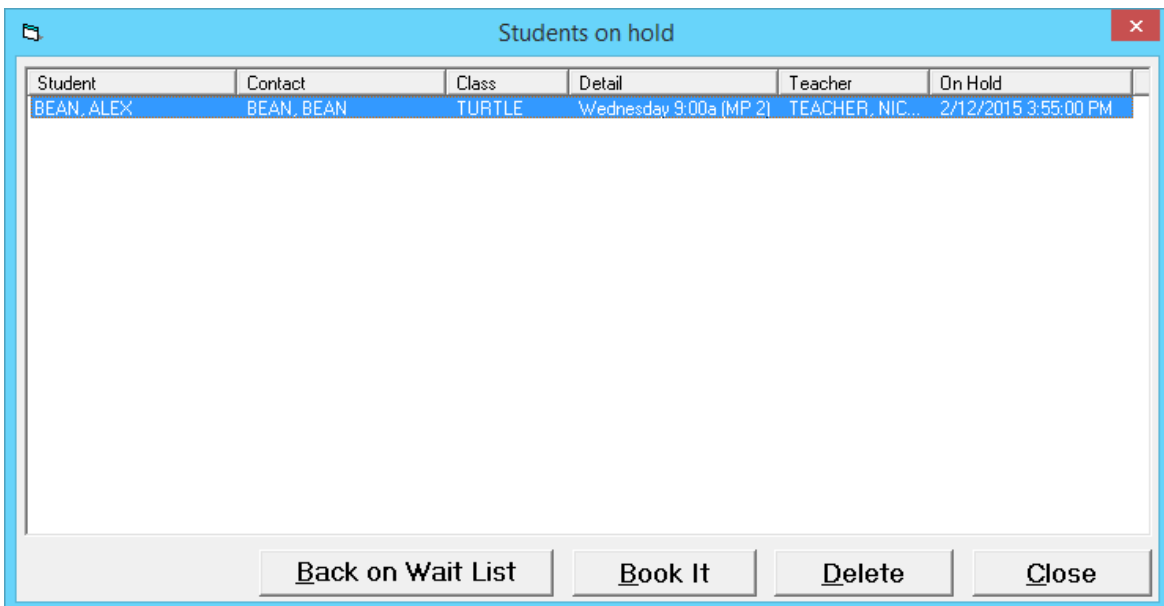
Before choosing to book a student from the waitlist you may need to see if they are currently enrolled in a class. Click on the [Student Details] button. Select the Status tab of the Customer Details screen and then the Classes tab to view any current bookings. Close the Customer Details screen to return to the View Wait List Requests screen.

- **[Book It] -** Clicking this button will open the Create Student Booking screen. Continue with the new student booking process as stated within the Making a Booking section of this document. The student will now be removed from the waiting list.
- **[Move It] -**This option allows you to move the student from their current class to a new suitable class as found by the waiting list. The Move Booking screen will appear. Continue with the move student booking process from the Moving Bookings section of this document. The student will now be removed from the waiting list.
- **[Put On Hold] -**This allows you to book a place for the student in the required class without allocating any fees and charges to the student file. Whilst a place is being held, the student cannot gain entry through POS without being taken off hold and enrolled into the class. Thus, allocating fees and charges.
The Create Student Booking screen will appear but without any date allocations or fees.
- **[Close]** - Press this button to close the View Student Waitlist screen

Viewing Students on Hold

Classes> Classes> View Students on Hold

This screen allows you to permanently book a student into a position which is being held or move them back onto the waiting list.
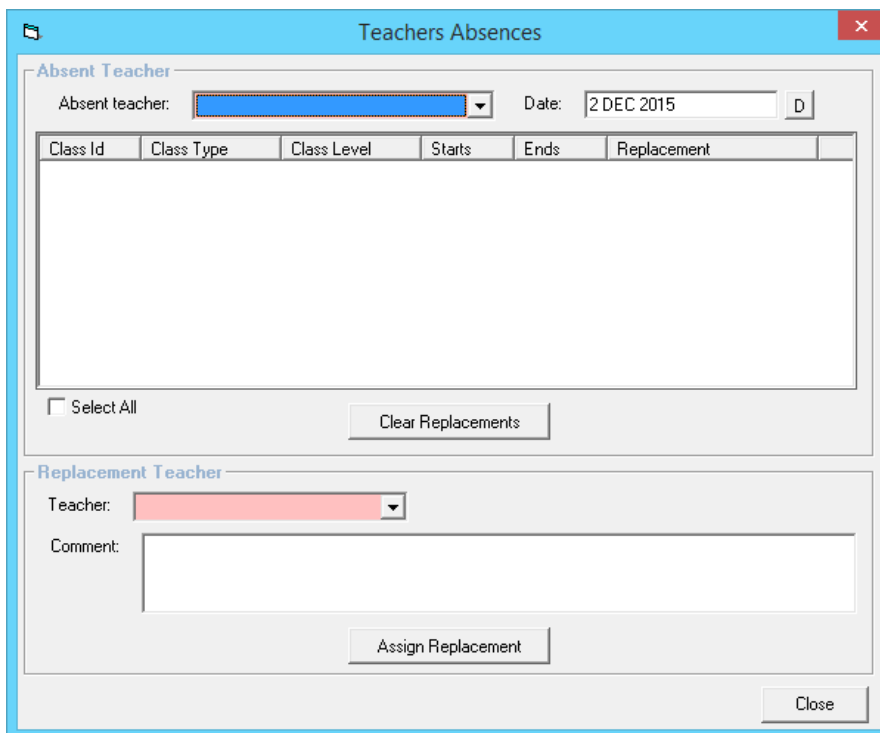
- **[Back on Wait List]** - This button enables you to take the booking off hold and return the student back to the waiting list as per their original criteria
- **[Book It]** -The Create Student Booking screen will appear. Continue with the new student booking process within the Making Bookings section of this document. The student will now be removed from the students on hold list.
- **[Delete]** -This will delete the held booking and the waiting list request will remain cancelled
- **[Close]** -Press this button to close the students on hold screen

Teacher Absences
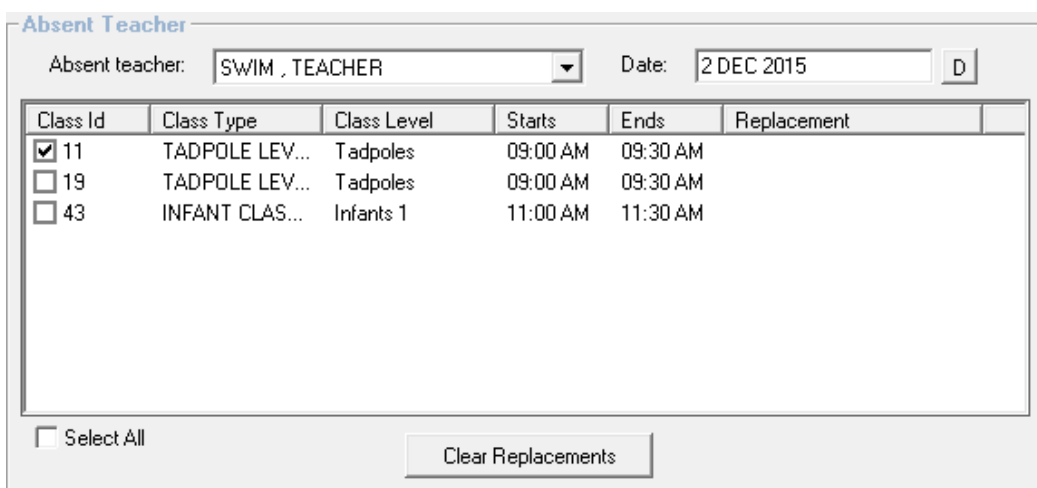
Classes> Staff> Teachers Absences

This window provides a recording of teacher absences and the allocated replacement teacher. This data is then readily available via a report in the Reports Module.

Allocating a Replacement Teacher

1. Open Teachers Absences screen; Classes> Staff> Teachers Absences
2. From the drop down, select the absent teacher

3. Select the date the replacement teacher will be covering the absent teacher
4. Select the classes the teacher will be absent for. There is the option to 'Select All'
5. Select the covering teacher from the teacher drop down

6. Enter any comments regarding the absent or covering teacher/s
7. Click [Assign Replacement] to complete the process
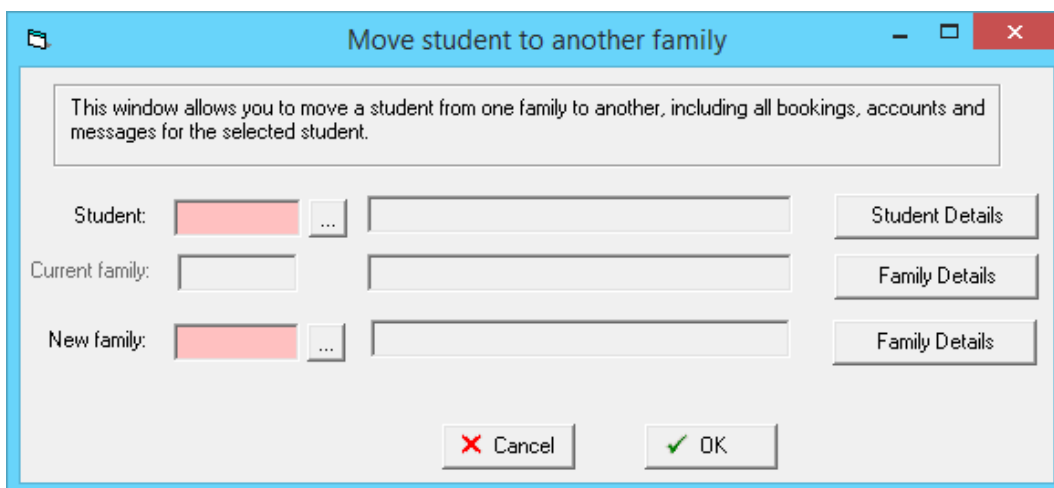
Note: Replacement teacher names will now appear on Timetable Reports for the applicable date/s. For more information please refer to the Reports User Guide.

Moving a Student into anotherFamily

Classes> Student & Families> Move Student into another Family

If you have accidently allocated a student to the wrong family you are able to easily move them into another family.

1. Search for the student by either:
    a. Typing their last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the […] button
2. Search for the new family you wish to move the student to by either:
    a. Typing the Responsible Person last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the […] button
3. Click [OK]

The student will now be moved to the new family, along with their booking, financial details and history.

How the Family Credit Process Works

Family credits allow for a greater range of flexibility with family payments. They also follow accounting rules making it easier for the transfer of monies from one income area to another. For example; when a booking is cancelled or a 'goodwill' credit is applied to the family, the amount is removed from the original income area and the amount placed into family credit liability account. When the credit is then used for another product or service within the database the income is then applied to the appropriate area. This will be detailed further below.

Listed below are the ways in which family credit may be accumulated:

1. Payment made through POS to a family account for future costs at the facility
2. Cancelled booking may result in a rebate if a booking is cancelled prior to the delivery of all paid lessons
3. Moved booking may result in a rebate if a student is moved from a level of higher value
4. Users can apply a goodwill credit to a family account for various circumstances such as cold pools and/or maintenance closures and so on

Family credit can be utilised in the following methods:

1. For purchase of other products and services offered at the facility for example, drinks and goggles
2. Default option when making a new booking is to use any available family credit
3. Family credit to be used by the direct debit run allowing for customers to pay in advance (e.g. no money in the bank) or for credits to be split across student bookings in on easy process
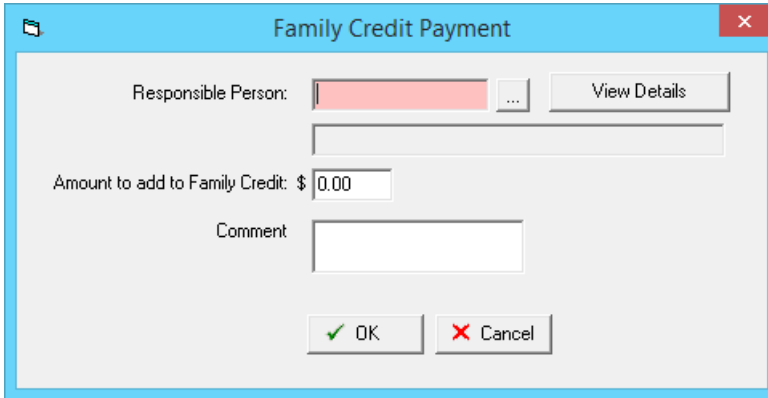
Note: To work with family credits in Classes, that is, pay from the family screen you will need to have your PC setup as a Till (POS> Till Menu> Setup).

IMPORTANT TO REMEMBER:

It must be remembered that when a booking is cancelled or a goodwill credit is applied the amount refunded/credited is taken from a particular service code. This means that there may be a negative amount for this income area if no other payments are taken within the reported timeframe.

Making a Payment to a Family Account

1. From POS Module, select [Functions]button
2. Click on [Family Credit Payment] button, the following screen will appear:

3. Search for the responsible person by either:
    a. Typing their last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the [...] button
4. Enter the amount to add to family credit
5. Enter a comment if required
6. Select [OK]
7. The amount will be returned to POS andcan be paid via any payment type that is accepted by your facility

Please refer to the Reporting User Guide for more information on how this process affects financials within Links.

Using Family Credit to make/pay for a Student Booking

When a booking is made or a class payment is taken Links will attempt to use the family credit before taking any additional money.

Using Family Credit to make a new Student Booking
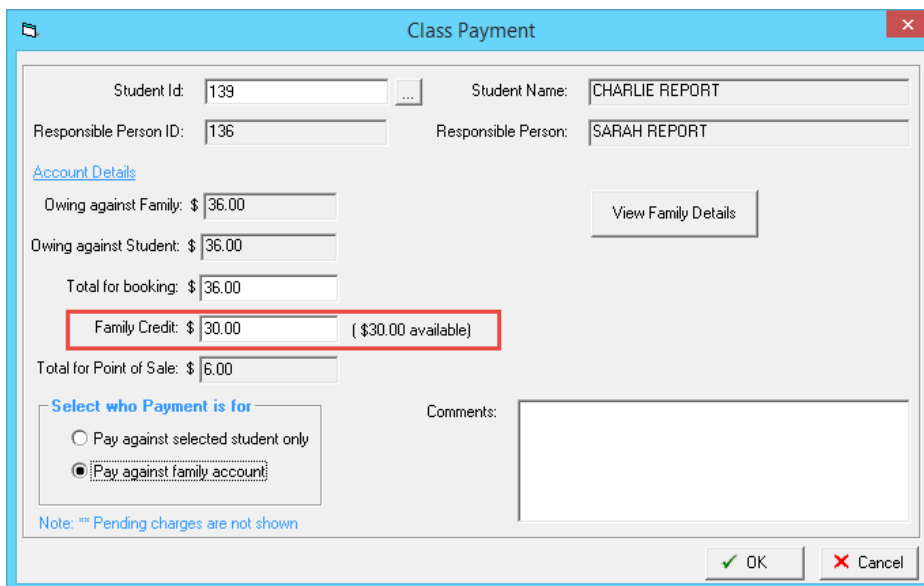
In the Create Student Booking screen, when 'Pay Now' option is selected the family credit is used first, see below:

Using Family Credit to pay for a Class Payment through POS

Again Linkswill attempt to use as much family credit as possible before collecting any additional money, see below:

1. Go to POS select the Class Payment Function
2. Search for the student by either:
     a. Typing their last name and hitting enter
     b. Typing their Customer ID and hitting enter
     c. Scan their card
     d. Selecting the [...] button
3. The Class Payment screen will open
4. If the family account has family credit owing the amount available will show

5. To proceed to take payment and utilise the credit click [OK]
6. Click [OK] on the Class Payment Spilt for Family screen
7. The class payment will appear in the transaction box in the POS screen and the family credit will show as a negative amount reducing the final payment

Using Family Credit to pay for a Class Payment from the Family Screen

Classes> Students & Families> Families> Accounts/Bookings tab

When a family has a credit owing in their family credit account and there is a booking which has outstanding money, the money from the family credit account can be allocated to the booking.

For Standard Class Types:

1. Open the Family Setup screen; Classes> Students & Families> Accounts/Bookings tab
2. Right click on the outstanding booking line

3. Select 'Apply Family Credit' from the list, the following screen will appear:
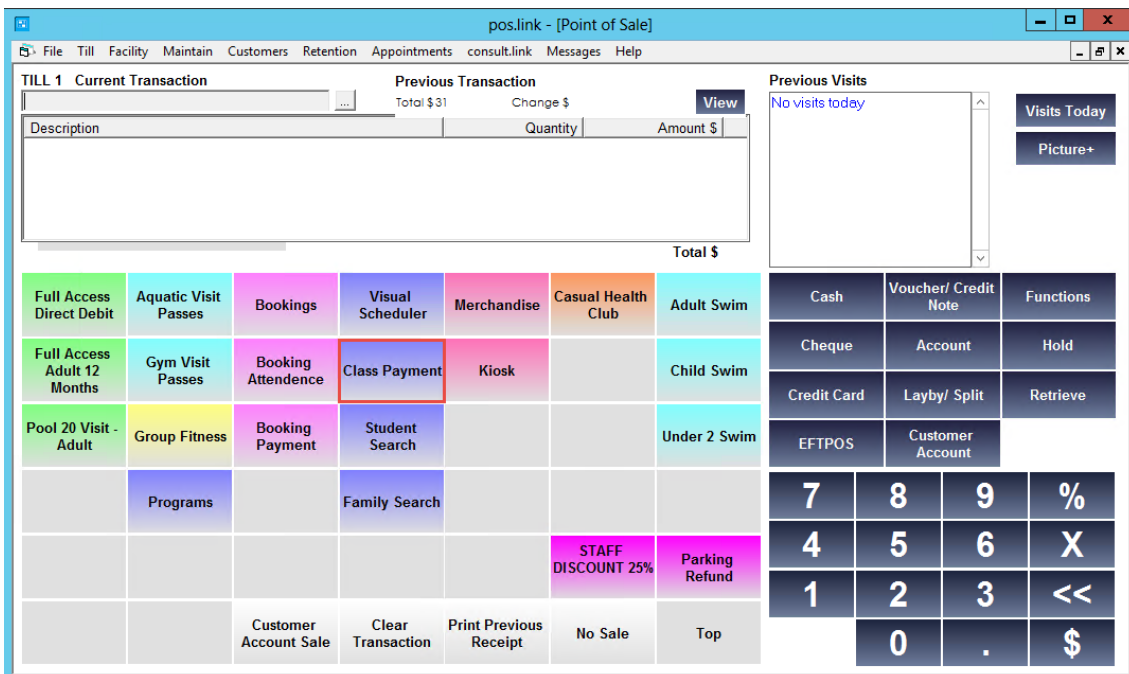
4. Enter the amount to be used and a reason if applicable
5. Click [OK]
6. Enter Staff ID& password

Please refer to the Reporting User Guide for more information on how this process affects financials within Links.
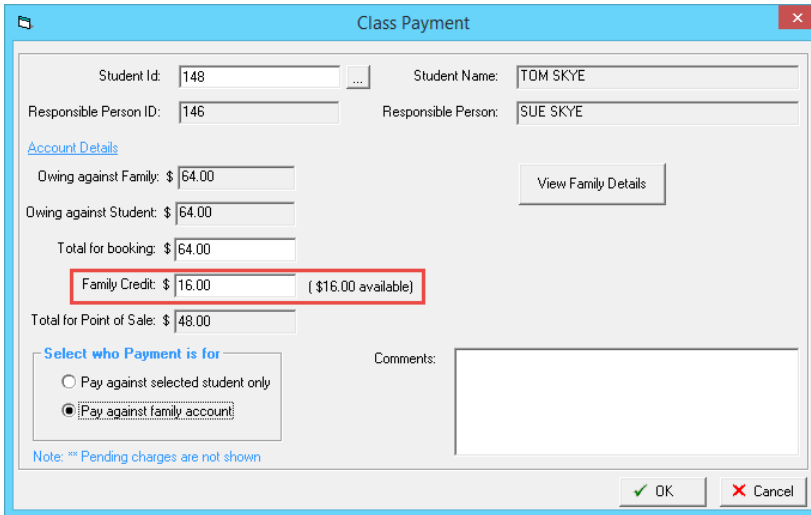
For Holiday Program and/or Squad Class Types after the initial booking has been made:

1. From POS Module, select Class Payment function button, alternatively select the [Function] button and then select [Class Payment]
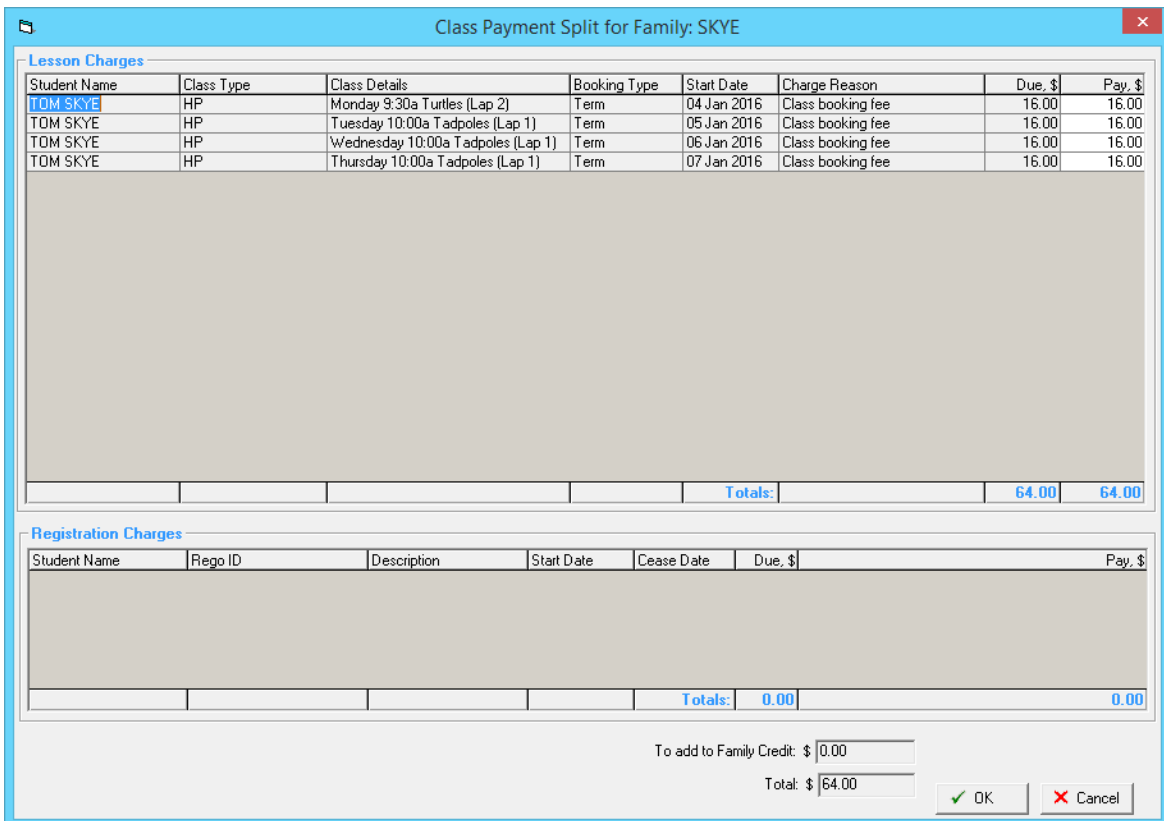
2. Search for the student by either:
   a. Typing their last name and hitting enter
   b. Typing their Customer ID and hitting enter

c. Scan their card

d. Selecting the [...] button

3. Once the student has been selected, the following information will display:

Note: In the example above, the family has $16.00 in the family credit field and $64.00 outstanding. To use the family credit towards the outstanding amount of $64.00, select[OK].

4. The following screen will appear, select [OK] to continue to apply the family credit to the outstanding charges

5. The transaction will now appear in POS Module with the family credit shown as a negative line where the credit has been used

TILL1 Transaction for SUE SKYE   **Previous Transaction**
Total $64   Change $0   View

Description	Quantity	Amount $
Family Account Sale	1	-16.00
Learn to Swim Holiday Intensive	1	16.00
Learn to Swim Holiday Intensive	1	16.00
Learn to Swim Holiday Intensive	1	16.00
Learn to Swim Holiday Intensive	1	16.00

Total $48.00

Note: The remaining $48.00 can be paid via any payment type that is accepted by your facility.

How to use Family Credit towards a New Booking

1. Follow the steps to create a new student booking. The Create Student Booking screen will be displayed and will show any credit owing as seen below

Pay now

= Due: $ 105.60   Family Credit: $ 0.00
Amount in Credit: $ 30.00   Amount to pay: $ 0.00

2. Click [Pay Now] to pay this amount immediately and the 'Amount to Pay' will be displayed

= Due: $ 105.60   Family Credit: $ 30.00
Amount in Credit: $ 30.00   Amount to pay: $ 75.60

3. Select [OK], the transaction will now appear in the transaction box in the POS Module. The family credit will show as a negative line where the credit has been used

TILL1 Transaction for SARAH REPORT **Previous Transaction**
Total $0   Change $ View

Description	Quantity	Amount $
Infants Swim School	1	75.60
Infants Swim School	1	30.00
Family Account Sale	1	-30.00

Total $75.60
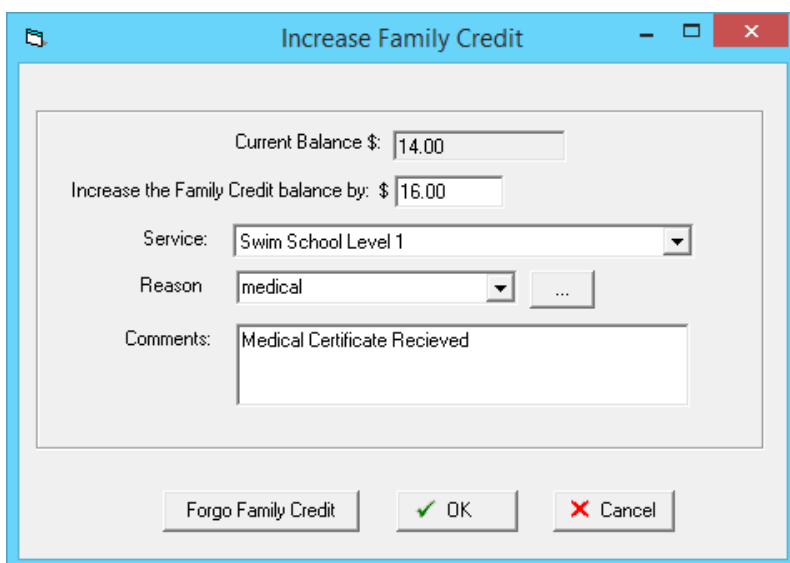
Note: Depending on the version of Windows being used, it may be necessary to click on the POS icon on the Windows toolbar to display the POS screen, it will most likely be flashing orange.

Applying a 'Goodwill' Credit through the FamilyScreen

Classes> Students & Families> Families> Accounts/Bookings tab

When providing a family with a credit for reasons such as promotional offer, cancelled lessons and so on, the income is effectively lost, as a service is being provided at no cost to the customer. For this reason when you give a family credit you must select which service code you wish to remove the income from. Links' suggestion would be that it is taken from the class that it is applicable to, for example if a student's preschool lesson was cancelled then you would reverse the income from the same service code.

1. Open the Family Setup screen; Classes> Students & Families> Accounts/Bookings tab
2. Click on the [Increase Family Credit] button, the following screen will appear:

3. Enter the amount to increase the family credit by
4. Select a service from the drop down menu to take the family credit from (remember this will make a negative transaction against the selected service code)
5. Select the reason from the drop down menu
6. Enter any additional comments if required
7. Click [OK], a transaction will now be written for a negative amount against the selected service code

Please refer to the Reporting User Guide for more information on how this process affects financials within Links.

Forgoing the Family Credit

If a family is in credit you may wish to forgo this credit for reasons such as the family has left the business and will no longer need the credit. This will forgo the liability that you are holding for the selected family.

Note: You can only forgo all or none of the family credit.

1. Open the Family Setup screen; Classes> Students & Families> Accounts/Bookings tab
2. Click on the [Increase Family Credit] button, the following screen will appear:

3. Select the [Forgo Family Credit] button, the following message will appear:

4. Click[OK]

Please refer to the Reporting User Guide for more information on how this process affects financials within Links.

Using Family Credit to make Purchases Other than a Student Booking

When a family has money in family credit they can use this for any purchase within Links. This means that a family may for example receive a credit for cancelled lessons and wish to use this amount for items such as drinks and goggles.

To make a family credit purchase:

1. Enter the product, service, membership or visit passas per normal through POS
2. Select the [Functions] button
3. Select[Family Credit Purchase] button, the following screen will appear:

4. Search for the responsible person by either:
    a. Typing their last name and hitting enter
    b. Typing their Customer ID and hitting enter
    c. Scan their card
    d. Selecting the [...] button
5. The current family credit balance will be displayed
6. Enter the amount to use fromfamily credit, by default as much as possible that can be used will be displayed
7. Enter a comment if required
8. Click[OK], the following will be displayed at POS:

9. Select a payment type to finalise the transaction

In the example above the service cost is $10.40 and there is $18.00 family credit available therefore the customer owes $0.00.
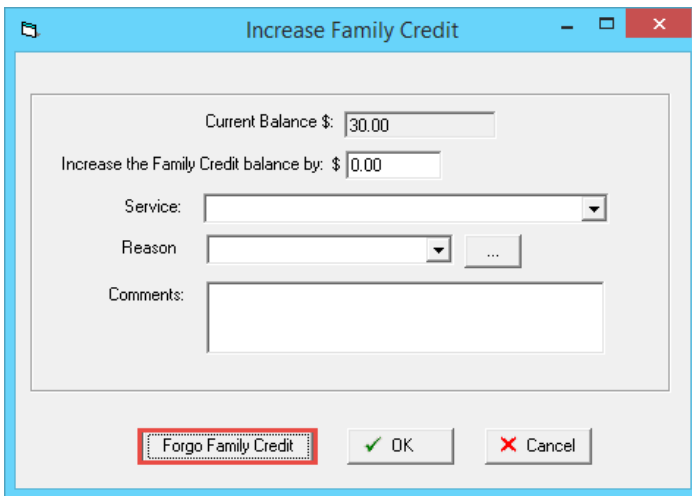
Please refer to the Reporting User Guide for more information on how this process affects financials within Links.
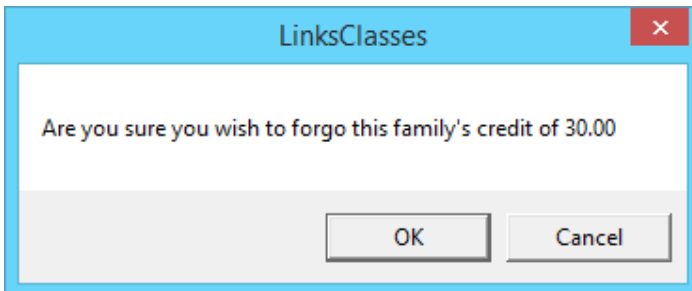
Paying out the Family Credit

You may wish to payout family credit, for example, issuing a refund to a customerinstead of a credit. The amount must first be applied to the family credit account. From there the amount can be paid out through POS.

1. Select the [Functions] button in POS
2. Select the [Family Credit Purchase] button, the following message will appear:
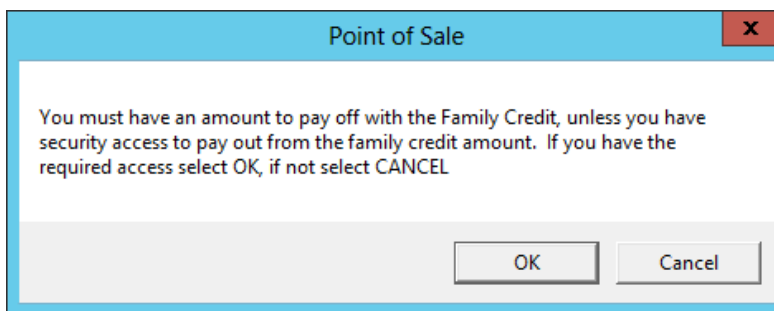
3. Click [OK]
4. Enter your Staff ID and password, then the following screen will be displayed:
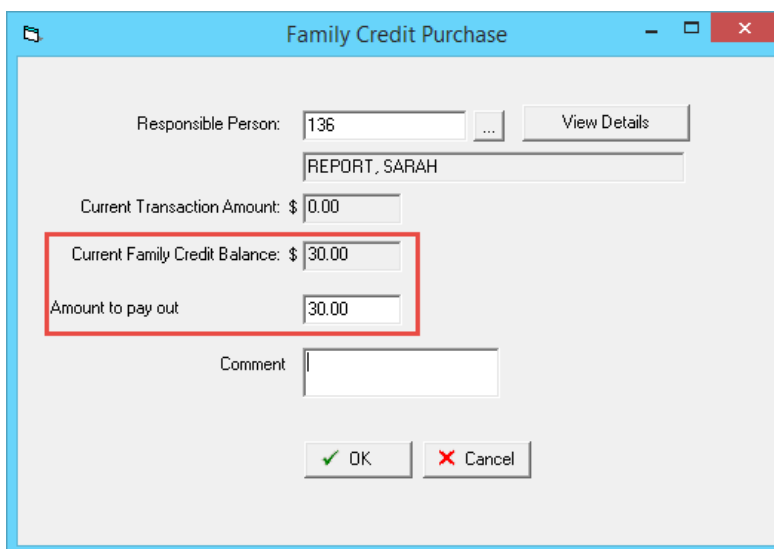
5. Search for the responsible person by either:
   a. Typing their last name and hitting enter
   b. Typing their Customer ID and hitting enter
   c. Scan their card
   d. Selecting the […] button
6. Enter the amount to be paid out and a comment if required

7. Click [OK], the following screen will appear confirming you want to pay out this money, select [Yes]
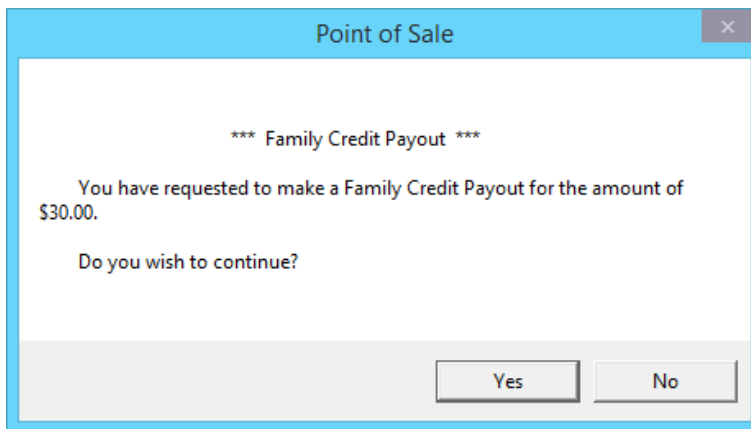
8. The amount will then be displayed at POS as a negative amount

9. Select the payment type that you wish to pay the customer with

This will now place a negative transaction against the selected payment type. For example, if you paid out the amount in cash and there were no other transactions for the day the till balance would display -$18.00.

Please refer to the Reporting User Guide for more information on how this process affects financials within Links.

Family Credit to be used by the Direct Debit Process

Classes> Students & Families> Accounts/Booking

By default all families will be setup to allow the family credit to be used by the direct debit run process. This is indicated by the flag within the Debit Details tab from the Family screen.

Family Details | Debit Details | Accounts/Bookings | HP/Squads | Account History | Make Ups | Registrations |

Direct Debit Details

☑ Family Credit to be used for DD/Online

By having this option flagged the direct debit process will use as much of the family credit as possible when processing.

Example:

A family of threestudents has $150.00 in family credit

Each student's fees per debit period is $65.00 ($195.00 in total)

The following is performed during the debit process:

Student 1 is charged $0.00 – leaving $85.00 in family credit

Student 2 is charged $0.00 – leaving $20.00 in family credit

Student 3 is charged $45.00 – leaving $0.00 in family credit

The order by which the students are allocated family credit is the same as the order by which they are displayed in the class payment screen through POS.

The student'swhose fees are reduced by family credit are displayed in the exceptions report during the direct debit run.

Impact on Cash Debit Process

Normally the cash debit process writes no transactions as the transactions are made when the customer pays the outstanding balance over the counter. However, when family credit is used a transaction is then written as effectively the customer is being charged and paying all in the one go. Reporting wise this is the same as when a student booking is paid through the class payment screen except that the charge payment type is 'Direct Debit'.
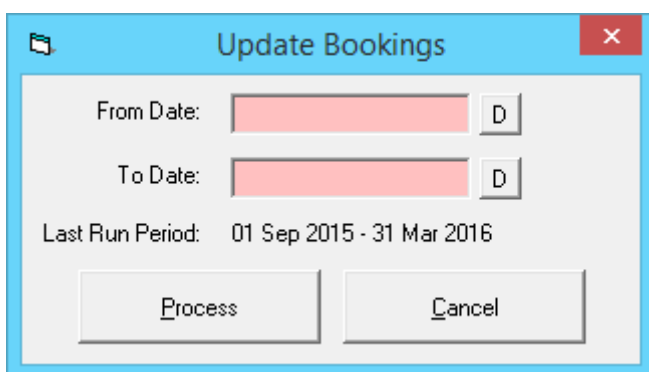
Updating Class Bookings

Classes> Classes> Update Class Bookings

Whilst perpetual bookings are never ending the view of these bookings needs to be manually updated to maximise the speed of Links. This process should be run on a term or quarterly basis and should be run in advance. That is, complete the Update Class Bookings process at the start of Term 1 which updates all the bookings for all of Term 1.

As a suggestion, it is sometimes a good idea to run this process at the start of the holidays prior to a terms commencement. Links also recommendsrunningthe Update Class Bookings process three months prior to the current date and six months in advance, for example, if today is April 1st run it from January 1st to September 30th.

This will ensure that no bookings have been missed.

1. In the 'From Date' field enter the date three months prior to today's date
   Note: '-90' can be entered in the 'From Date' field and this will automatically select the date 90 days (approximately three months) prior to today's date.
2. In the 'To Date' field enter the date six months in advance from today's date
   Note: '+180' can be entered in the 'To Date' field and this will automatically select the date 180 days (approximately six months) from today's date.
3. Click[Process]