Table of Contents

Facility Overview

POS> Facility> Visual Facility Bookings

Links provides a simple to read and easy to use facility management function that can be tailored to the needs of your facility.

This screen consists of 5 main areas:

1. The preview pane	This displays all the sections of the facility's available for booking.
2. The date and quick selection keys	The date lets you choose the date you wish to book. The quick selection buttons at the top can be customised to act as shortcuts to display the mostly used facilities for quick viewing and booking.
3. The colour key	These colour keys are your indicator to a booking.
4. The session display	This shows you what is currently booked and what is available to be booked.

5. & 6. The function keys	These allow you to perform different functions on Facilities, from searching for bookings to making and attending bookings.
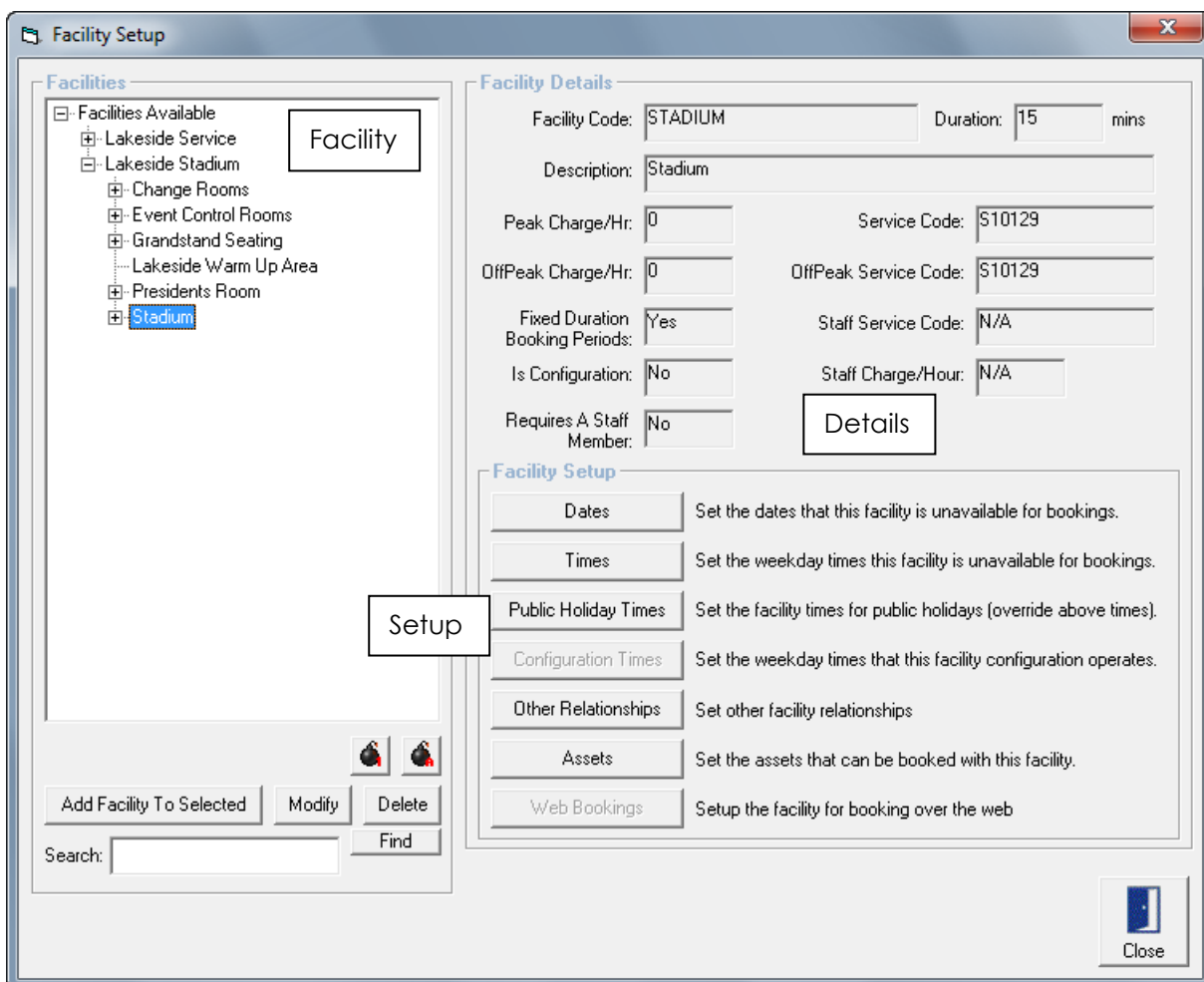
Facility Setup

Admin> Facility> Setup Facilities

Prior to Setting up Facilities you need to make sure that you have set up the following in the Admin module:

- Prime Usage (Admin> Site> Table Maintenance)
- Service codes for charge rates and staff (Admin> Products and Services > Services/ Services Master)

Facility Setup allows you to manage the various sections of your facility that are available for hiring. Once you have set your facility up by specifying the rate, dates and times available, bookings can then be made through Point of Sale.

The above facility setup screen can be divided into 3 areas:

Facility   Shows the preview of your facilities that have been setup. This tree

                    can be expanded and contracted by using the bombs at the
                    bottom of the pane.

Details   This area shows you the details that you have setup for the Facility,
                    the reporting, costs, duration etc.

Setup   This is the area where you setup times, available days and assets.

Adding a New Facility
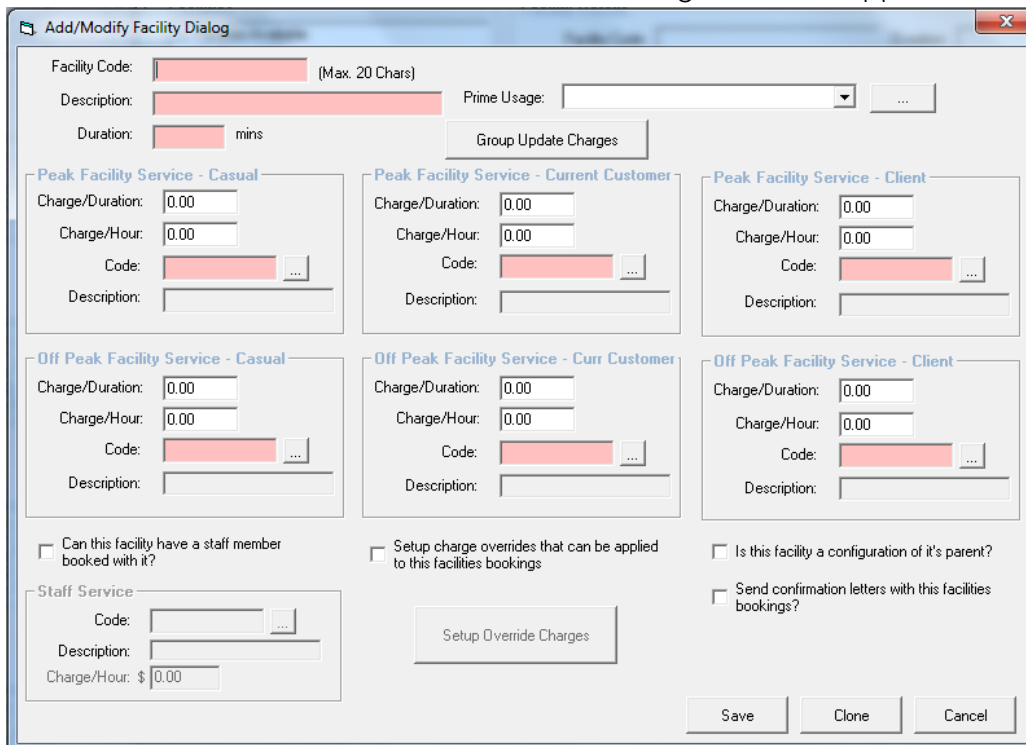
Admin> Facility> Facility Setup

Adding a New Facility will add a new whole facility that can then be broken down further,
e.g. Setup the 50m pool which can then have lanes 1-8 added under the main facility.

1.   Click on Facilities Available so it is highlighted
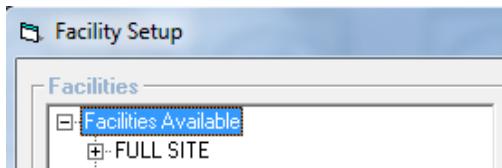
2.   Select   and the following Screen will appear

Enter the Facility code	This is the name of the facility i.e. 50m Pool Outdoor.
Enter the Description	This is the display name which will be shown in the visual facility bookings.
Enter the Duration	This is how many minutes in duration the facility can be booked at a time i.e. 15 min 30 min or 60min
Enter the Prime Usage	Using the ▼ to select the prime usage of the facility.
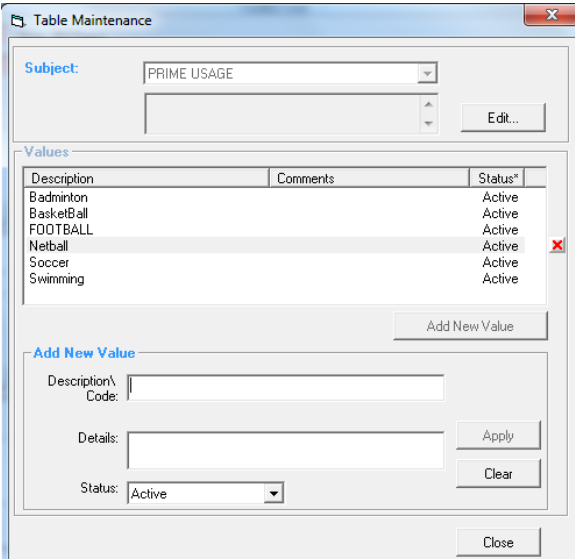
Creating a Prime Usage

To create a Prime Usage if this has not been done through Admin prior to setting up the Facility

a. Select [........] which will take you to the Prime Usage Table Maintenance

b. Simply add the Description/Code, this will be what is displayed as the Prime Usage
c. Enter the details
d. Select Apply

3. Enter the Peak Facility Service for Casual, Customer and Client; you have the ability to charge different rates for each of these in Links.

Peak Facility Service Setup

This is to set up the charge's for 'Peak Time' use of the facility (to set Peak Times go to Times in Facility setup). You first need to know what you wish to charge for the facility and ensure the service code is already set up in Admin module.

a. Start with 'Peak Facility Service Casual'

b. Enter the Charge/Duration or the Charge/Hour
c. The following screen will appear

d. Select Yes if you wish to use the same cost for Customer and Client for Peak times or select No if you will be charging different rates
e. The following will appear:

f. Select Yes if you wish to use the same cost for Customer and Client for Off Peak times or select No if you will be charging different rates

g. Enter the this is the service code and can be found by selecting and the following screen will appear

h. Enter the description of the service and select the radio button 'Containing'
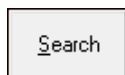
i. Select

j. Select the service you wish to use by double clicking on it or highlighting it and pressing 'Select'

k. The following screen will appear

l. Select Yes if you want to use this code for Client and Customer for Peak Bookings or select No if you will have other Service Codes

m. The following screen will appear
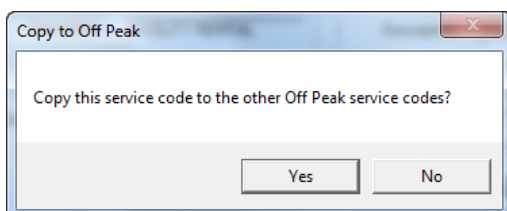
n. Select Yes if you wish to use this Service code for Client and Customer for Off Peak bookings

o. You will need to fill in Peak Service for Customer and Client if you did not wish to use the same prices and codes as Casual, to do this repeat the above steps as applicable

4. Now enter the Off Peak Facility Service for Casual, Customer and Client, If you were using the same costing and service charges as Peak this will already be completed.

Off Peak Facility Service Setup

This is to set up the charge's for 'Off Peak Time' use of the facility (to set Off Peak Times go to Times in Facility setup). You first need to know what you wish to charge for the facility and ensure the service code is already set up in Admin module.

a. Start with Off Peak Facility service Casual

b. Enter the Charge/Duration or the Charge/Hour
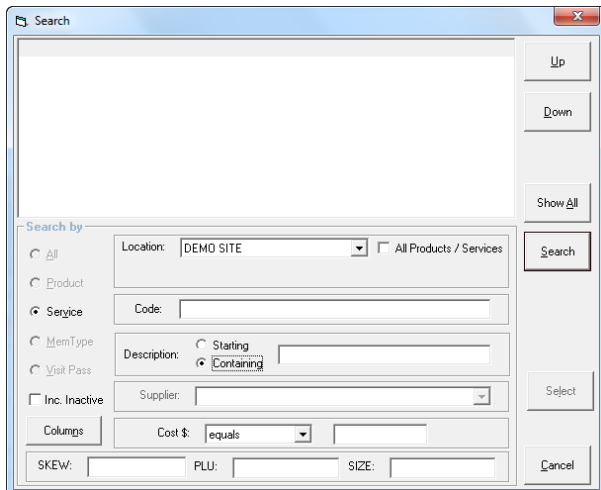c. The following screen will appear

d. Select Yes if you wish to use the same cost for customer and client for Off Peak times or select No if you will be charging different rates
e. The following will appear

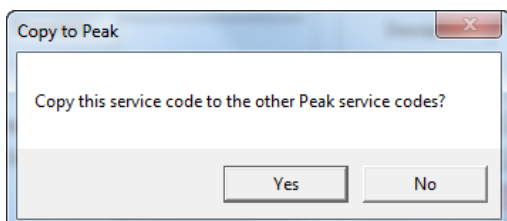f. Select Yes if you wish to use the same cost for Customer and Client for Off Peak times or select No if you will be charging different rates

g. Enter the **Code:** [   ] ... this is the service code and can be found by selecting ... and the following screen will appear

h. Enter the description of the service and select containing

i. Select **Search**

j. Select the service you wish to use by double clicking on it or by highlighting it and pressing 'Select'

k. The following screen will appear

l. Select Yes if you want to use this code for Client and Customer for Off Peak bookings or select No if you will have other Service Codes

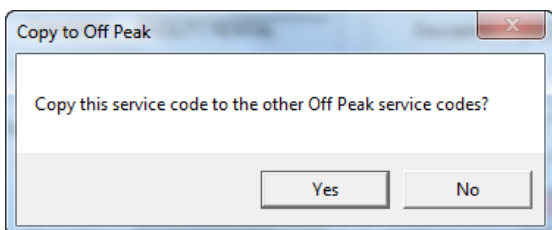m. The following screen will appear

Copy to Peak

Copy this service code to the other Off Peak service codes?

Yes   No

n. Select Yes if you wish to use this Service Code for Client and Customer for Off Peak bookings

5. Now Select the following options if you would like them to occur for this Facility

Can this facility have a staff member booked with it?

Tick this option to allow staff to be booked with the facility. When this is ticked the option to put a staff Service Code and amount per hour will show. See Adding Staff on how to do this.

Setup charge overrides that can be applied to this facilities bookings

Charge override refers to alternative prices you wish to charge for a particular booking. You may wish to use this for a facility that can be used for another function that you don't charge at the same rate. For example: A basketball stadium that is used for netball as well , however you charge netball at a different rate than if you were hiring the basketball stadium. See Setup Override Charges on how to do this.

Is this facility a configuration of it's parent?

Tick this option if the facility is hired out for multiple purposes. For example: A basketball court which is also utilised for netball and volleyball, then this would be selected.
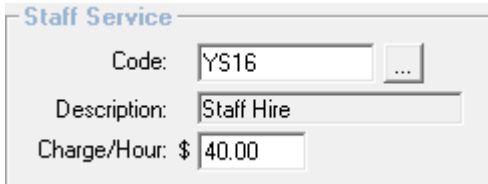
Send confirmation letters with this facilities bookings?

Tick this option if you require confirmation letters to be sent when booking this facility.
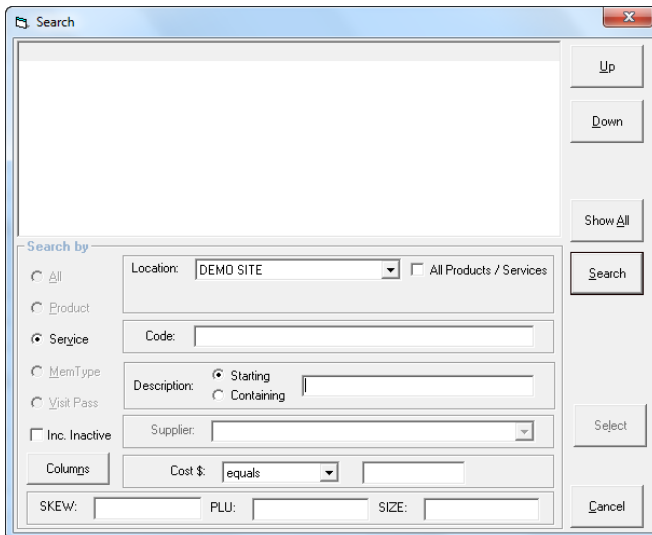
6. Enter the Staff Service if you selected that you wish for Staff member to be booked with the facility.

Adding Staff Service

If this option is selected, staff will be able to be booked with the facility. A Service Code and charge needs to be entered to do this. The Service Code needs to be already be setup in the Admin Module.

   a. Under Staff Service, search for the code by selecting [...] the following screen will appear

   b. Search for the Service Code
   c. Once you have found the Service Code you are after double click on it or highlight it and press 'Select'.

   d. Enter the charge amount Charge/Hour: $ 30.00
   7. If you are going to charge alternative amounts when making facility bookings, you will need to set up any Charge Overrides [Setup Override Charges]
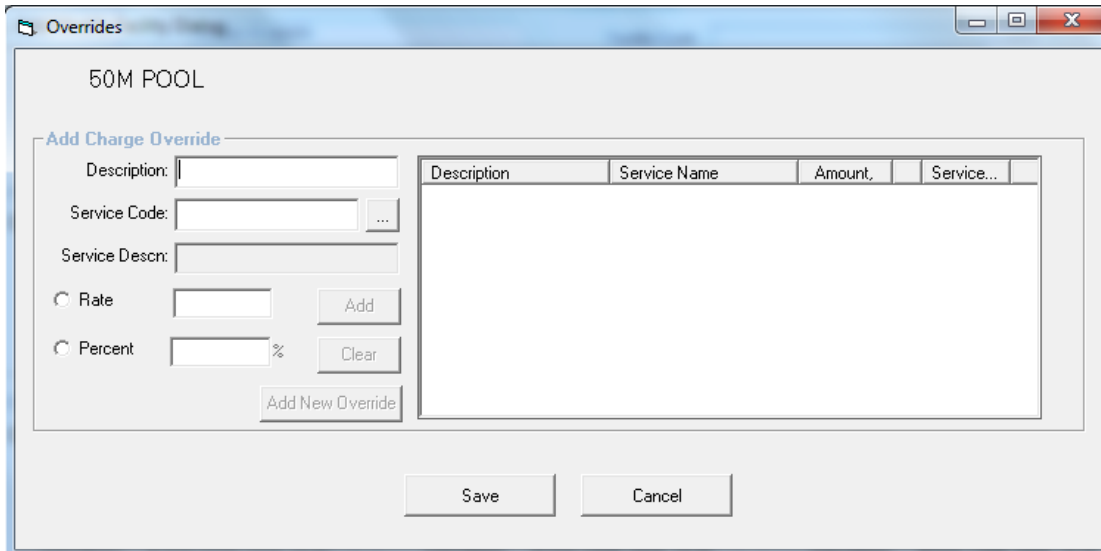
Charge Override Setup

Charge override refers to alternative prices you wish to charge for a particular booking. You may wish to use this for a facility that can be used for another function that you don't charge at the same rate. For example: A basketball stadium that is used for netball as well but you charge netball at a different rate than hiring the basketball stadium.
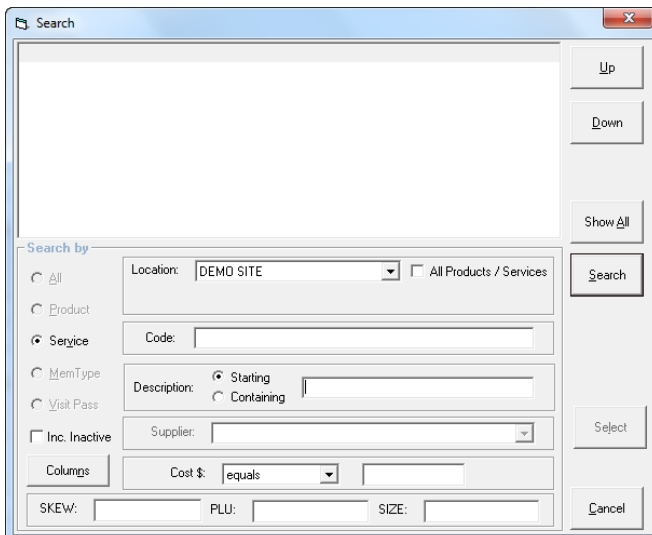
Note: You need to make sure that you have created a Service Code before you create a charge override in Admin > Products and Services > Services/Services Master. This will relate directly to the recording of income for reporting purposes.

a. Select [Setup Override Charges]
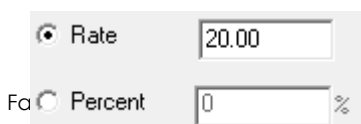
b. Enter a description in the description box. This is what the override price will be known as

c. Select a Service Code by selecting [...] the following screen will appear

d. Search for the Service Code
e. Once you have found the service code you are after double click on it or highlight it and press 'Select'
f. Either select Rate or Percentage. Rate is a set cost and Percentage is the percentage of the normal cost

g. Select [Add], you will then see this override in the window on the right

h. To add another override select 'Add New Override'
i. Repeat steps b-g
j. Once you have finished entering all the overrides, select 'Save'
k. These override prices will now be available when you make a booking for this facility

8. Once you are happy with all the details you have entered for the new Facility select 'Save' to finalise

Facility Settings

Admin> Facility> Facility Setup

Facility Setup is where you set up the functions of your Facility. Choose a facility from the tree, whichever facility is selected is the one that you will be making adjustments to.

Dates

This is where you set days that are unavailable for booking within in a facility.

Setting Unavailable Dates

1. Select ___Dates___
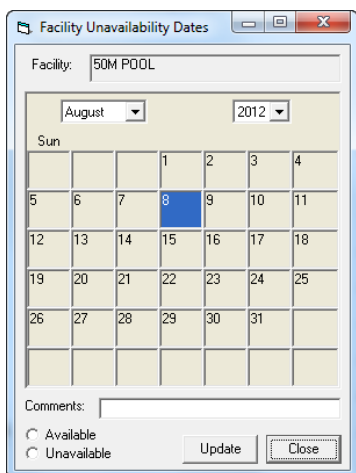
2. Find the date you wish to make unavailable by searching for the year, month and day and click on to it
3. Select the Unavailable radio button
4. Insert a comment if necessary
5. Select 'Update'
6. This box of this date will now show red

To make this date available again select the date

1. Select the Available radio button
2. Select 'Update'

Times

This is where you set the available and unavailable times for facility bookings. You also have the ability to make off peak times which will charge the off peak rate you have set up when setting up the facility.

Setting Times for Facility Bookings

1. Select ⬚ Times ⬚. You will see that the time default is available as peak 24 hours a day, 7 days a week
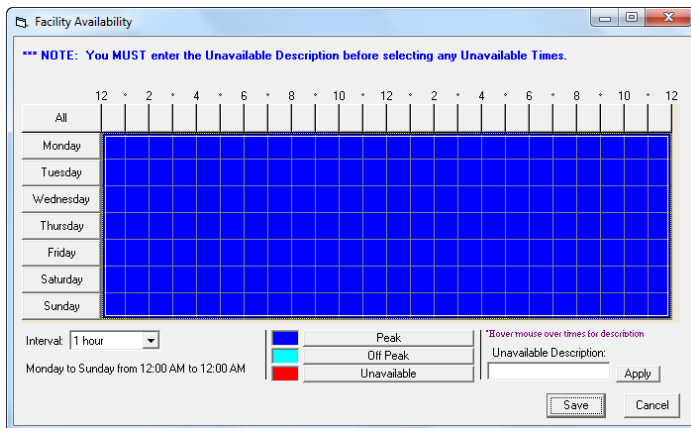
2. Enter the unavailable times, to do this click and drag over the times
3. Enter an Unavailable description and select 'Apply'
4. Repeat this if more than one time is not available
5. You can enter the Off Peak times. This is done the same way, by clicking and dragging over the times
6. Then select ⬚ Off Peak ⬚
7. Repeat this for any other Off Peak times, your screen should now look a similar to the following:
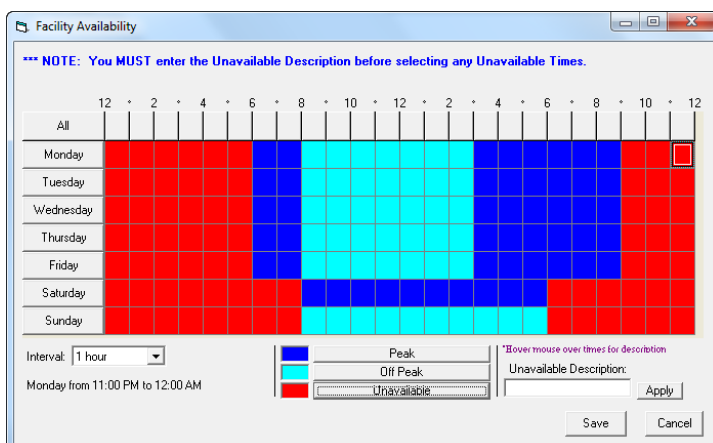
8. Once happy with the times select 'Save'
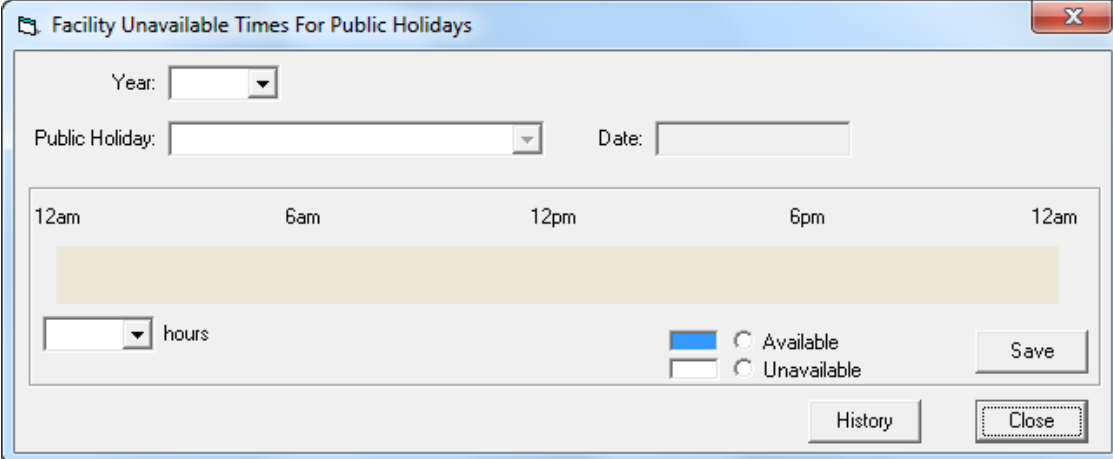
Public Holiday Times

This is where you can specify the Public Holidays times the facility is available/unavailable for bookings. You will need to have set up Public Holidays first via Admin> Admin> Setup Public Holidays.

Entering Public Holiday Times

1. Select **Public Holiday Times**

2. Select the year you wish to set the public holiday for by using the drop down box ▼
3. Select the public holiday from the drop down box ▼
4. The times the facility are available will default to the normal times available
5. Select ○ Unavailable
6. Now click on the blue squares that you wish to make unavailable and they will turn white
7. Once happy with the times select save
8. Select 'Close'

Configuration Times

If the facility being added is a configuration (by configuration we mean that it can be setup for a certain sport or function at any particular time or day) of another facility then the times that this facility is available/unavailable are specified here. This needs to have been setup in the facility set up prior.

Adding a Configuration Time

1. Select [Configuration Times], this will only be available if the facility was set as an configuration of its 'parent'
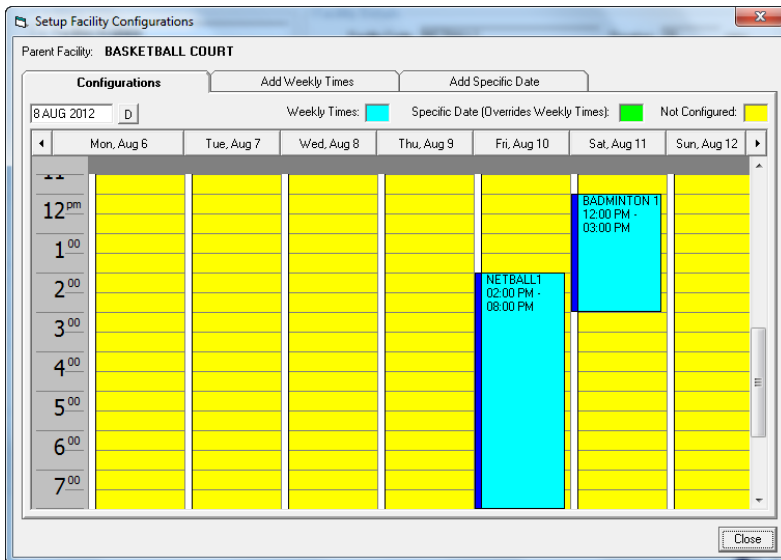
2. This will show any current configurations, Blue is weekly times, Green is a specific date and yellow is not a configured time
3. Select the 'Add Weekly Times' tab for ongoing weekly configurations
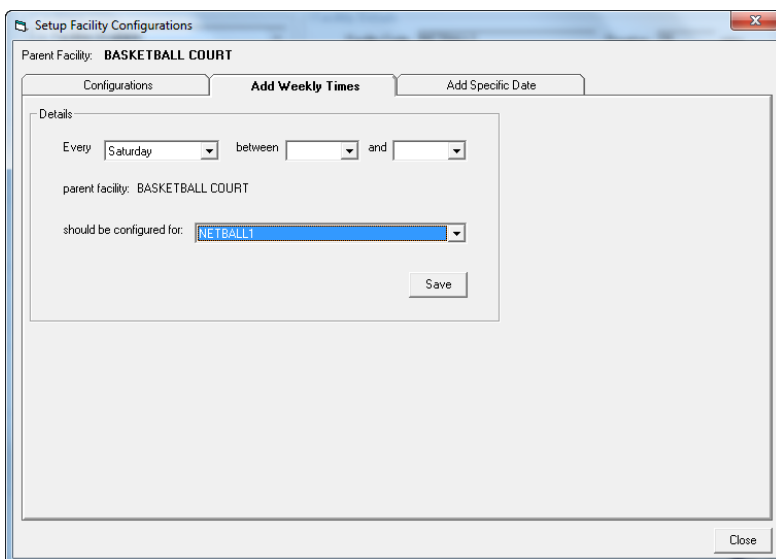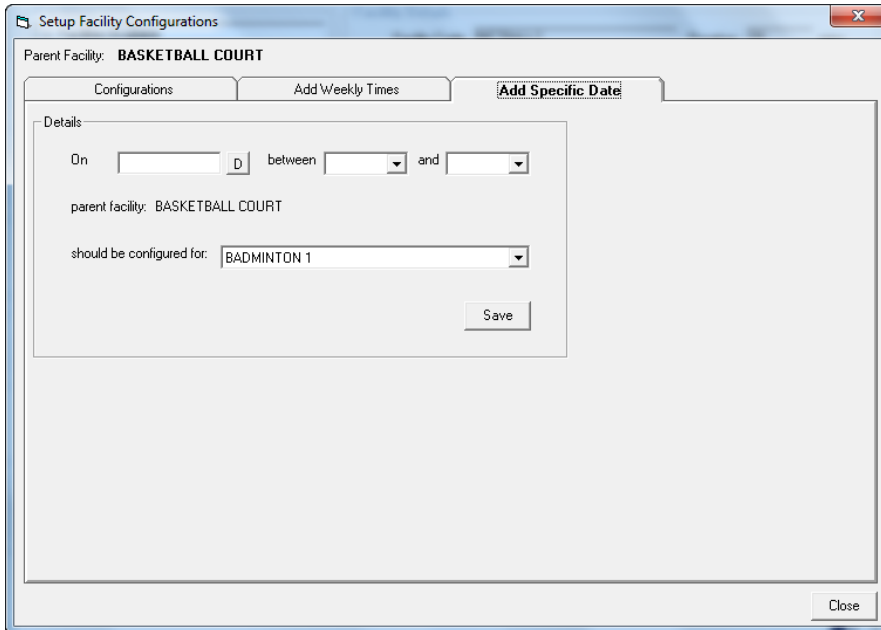
4. Enter the day you wish for it to occur on
5. Enter the start and finish time for the configuration
6. Select how it should be configured from the drop down box

7. Select 'Save'

Making a Configuration for a specific date

1. Select the 'Add Specific Date' Tab

2. Select the date for the configuration
3. Enter the to and from times
4. Select what the facility should be configured for
5. Select 'Save'

Other Relationships

This gives you the ability to enable multiple configurations of facilities such as Sports Halls and Pools. This is ideal for users that change lane options or have numerous sports played on the one court. The most common use of co relationships is that of a sports hall with half courts and badminton courts. In the past users would have setup Badminton Court 2a and Badminton Court 2b and had these under respective half courts. Users can now assign the Badminton Court 2 to both half courts.

Creating Facility Relationships

To assign the co relationships you will need to go to Admin> Facility> Setup Facilities

1. Click on facility you wish to assign
2. Click on 'Other Relationships'
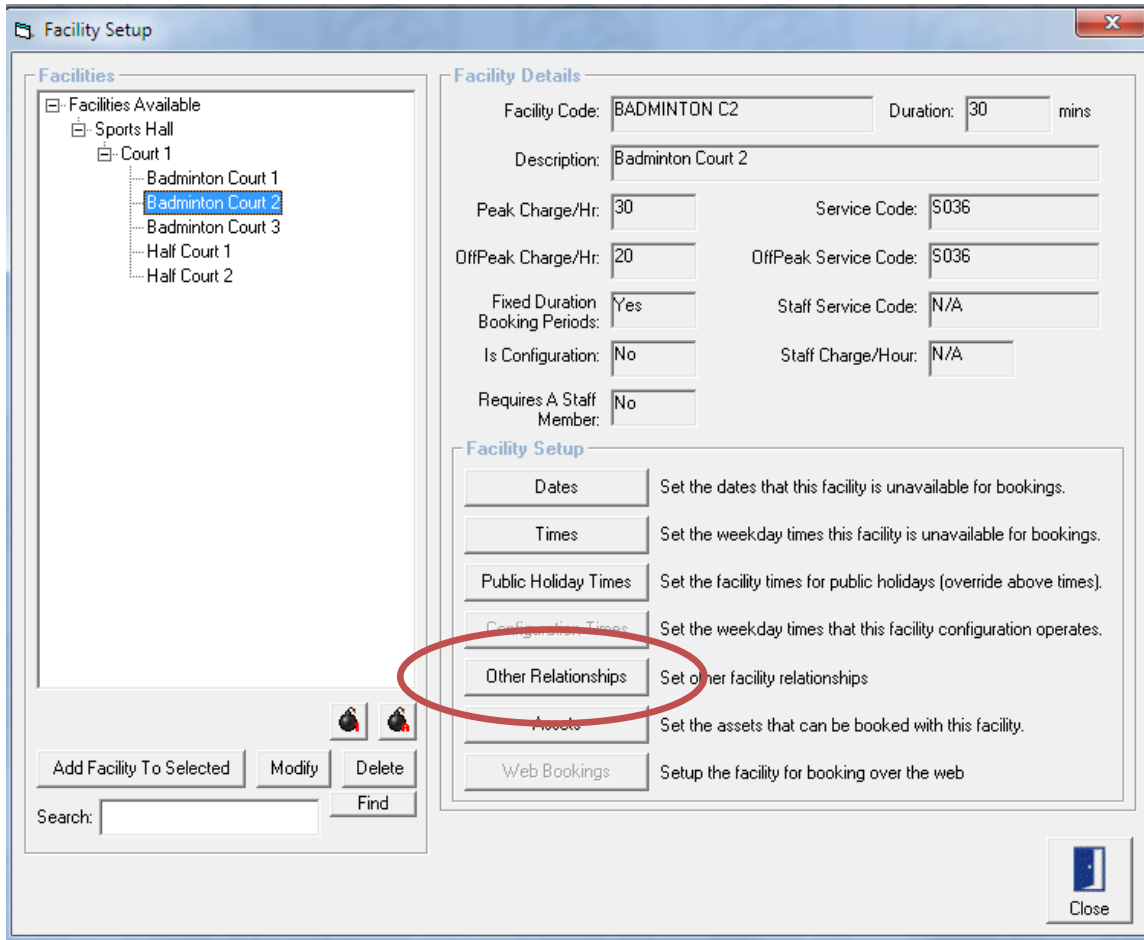
3. The following screen will appear

4. You can then select [Add related facility]
5. This will display a list of the facilities so you can then select which facilities should be blocked out when this facility is in use.

Other examples of where co relationships may be used are;

1. Booking the entire pool also books the PA System and Podiums at no additional cost
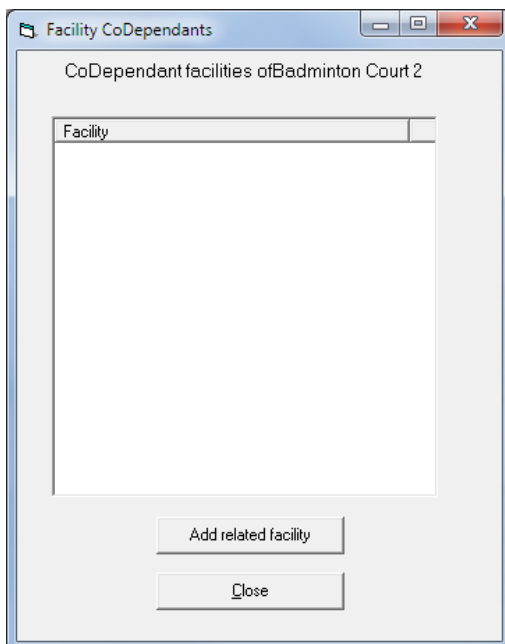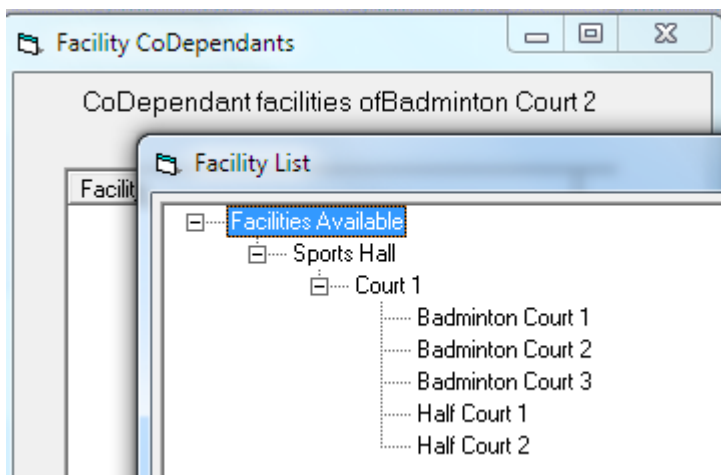2. Booking Lanes 1-3 automatically make Lane 4 unavailable for Booking

A volleyball court in the middle of a netball court makes both half courts unavailable

Assets

An Asset is a product that you can have available with a particular facility hire. I.e. Netball rings for the stadium or kickboards for the pool; this can be either charged or non-charging. The assets must already have been set up in order to be specified at this time via Admin> Facility> Setup Assets

Adding Assets to a Facility

1. Select [Assets]
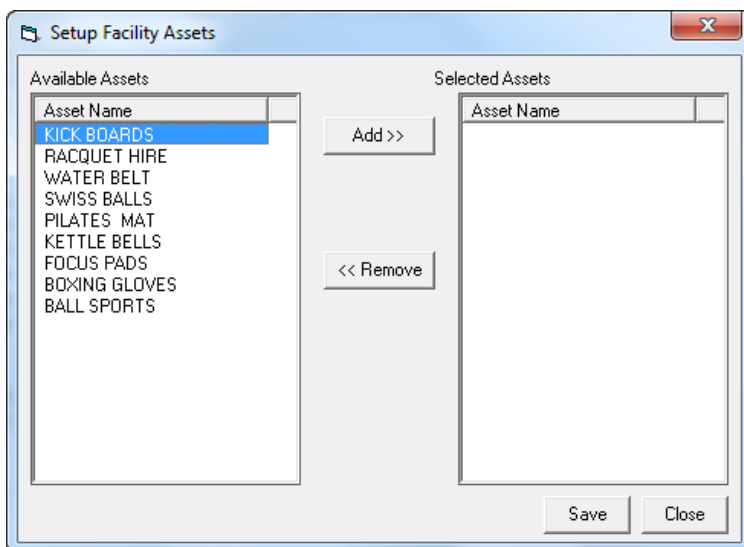
2. Hold down the Ctrl key and click on the assets you wish to make available for this facility
3. Once all the appropriate assets have been selected select [Add >>]

4. The facilities will now show on the selected assets side of the screen
5. These are now available to hire for this facility

6. Once finished select 'Save'

Check for Overdue Facility Bookings Automatically

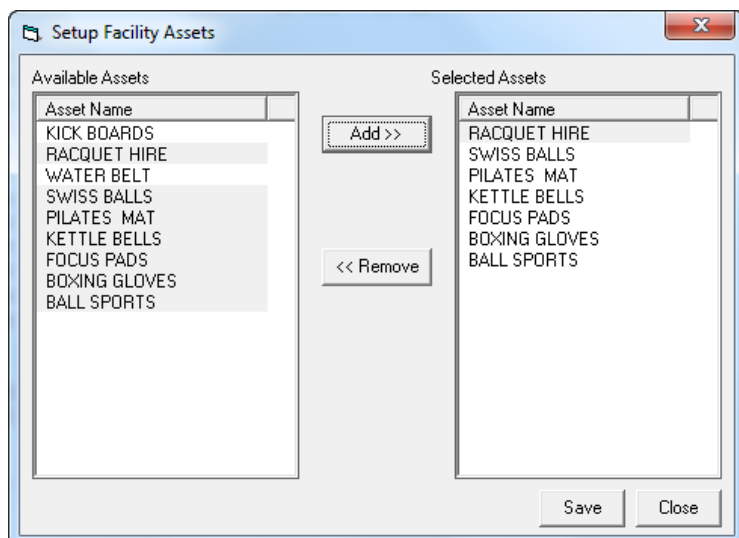This Links setting automatically checks for any overdue bookings not marked as attended. A message will appear every time a facility booking has past and hasn't been recorded as attended. This message will appear every 2 minutes, therefore it is not recommended for those facilities that have a large amount of facility bookings.

1. Go to Admin> POS> Setup
2. Either select or unselect ☐ Check for overdue facility bookings
3. Select 'OK'
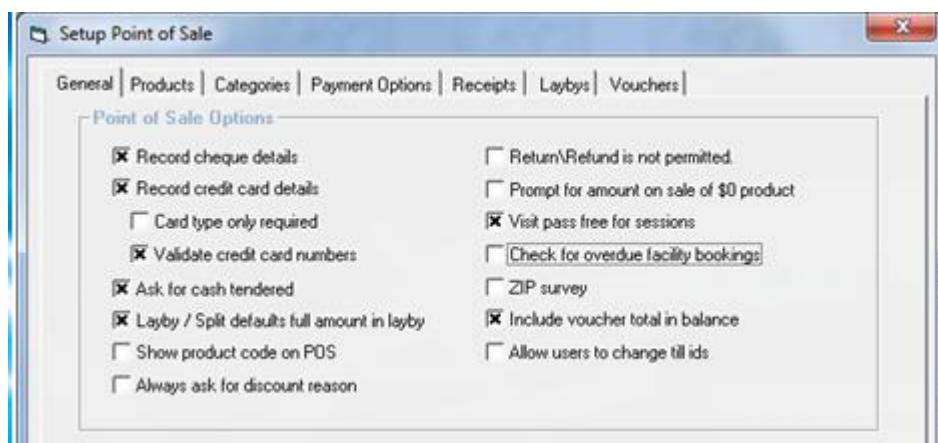
Facility Security

There are a number of security levels that you can allocate in the Facility module. These include view only and casual only booking options. The security features are found under Admin> Security> Security Groups.

For in-depth security options for Facility please see the Admin Module for further information.
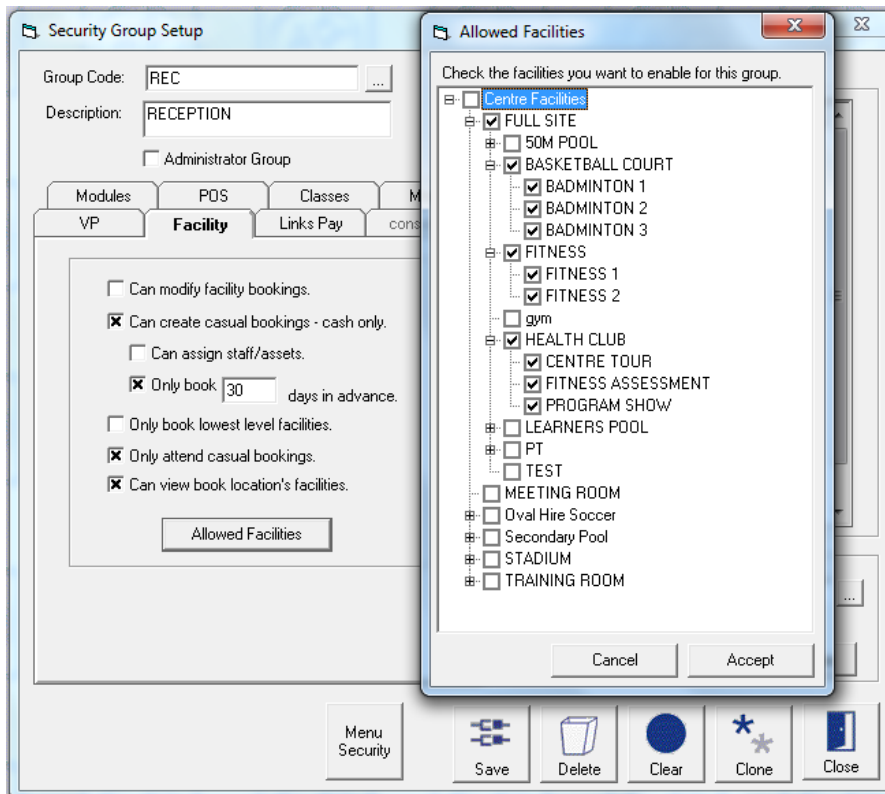
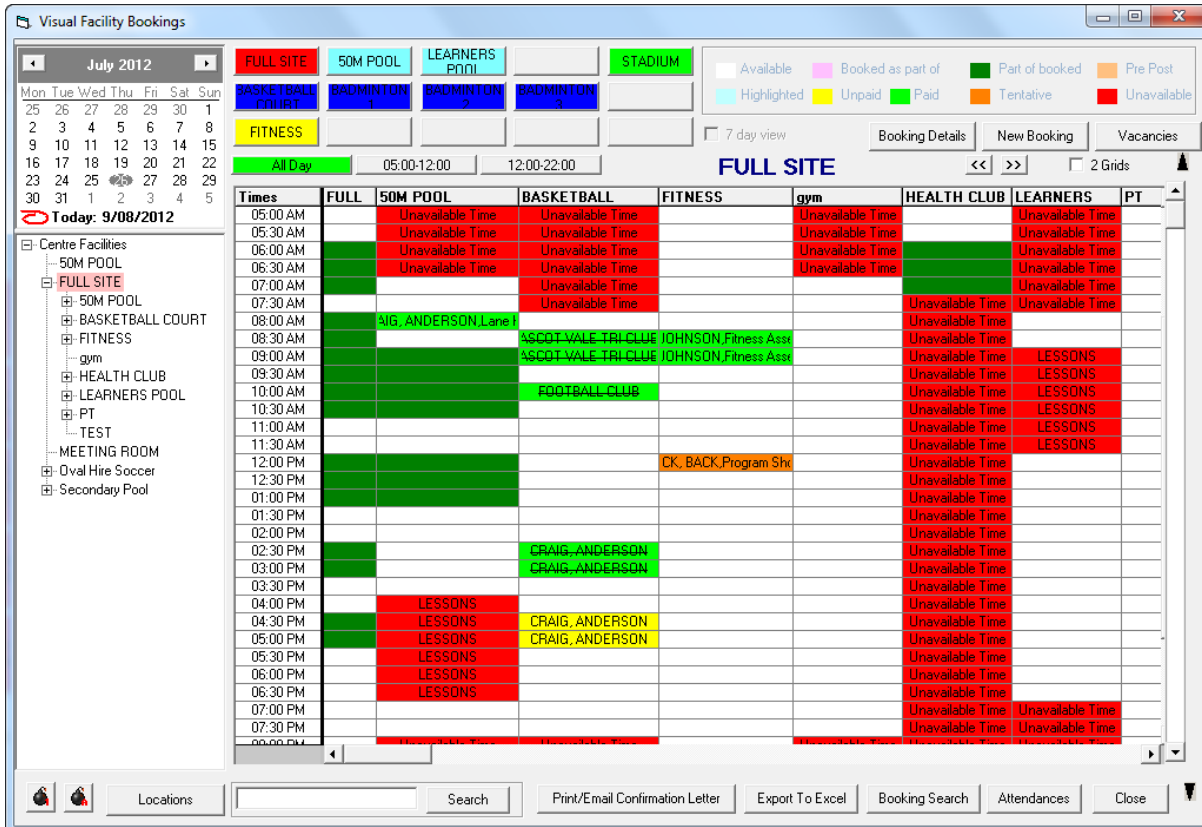There are a number of security options available from:

- Allowing users to modify bookings already made
- Ability to only create casual bookings – cash only
- Limitations on assigning staff & assets
- Restriction on how many days' staff can book in advance
- Restriction to only book the lowest facility i.e. can book Lanes 1 and 2 but not the entire pool
- Can only attend casual bookings

You can also restrict the facilities that the staff allocated to the Security Group can book. For example reception staff can only take Basketball Court and Health Club bookings.

Visual Facility Bookings Functions

Below is a broken down Visual Facility Bookings screen so you are aware of all the functions on this screen.

POS> Facility> Visual Facility Bookings

Here you can select the date you wish to view. You have the option of using ◄ ► to move back or forward a month.
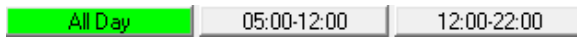
Or if you select the name of the month you can select a month in that same year.

Otherwise if you click on the year you can move forward or back one year at a time.

The Quick Keys allow you to have your most used facilities set to these buttons for quick viewing.

| All Day | 05:00-12:00 | 12:00-22:00 | You have the option to select to see the bookings for 'All Day', 'Morning only' or only 'Afternoon only' which minimises what is shown on the screen.

| Available | Booked as part of | Part of booked | Pre Post |
| Highlighted | Unpaid | Paid | Tentative | Unavailable |

This Shows the colour codes which relate to the bookings on the scheduler.

☐ 7 day view

When ticked this shows the next 7 days and can only be used if the facility is not configured, i.e. you cannot see the next 7 day view for the 50m pool but you can see lane 1 for the next 7 days.
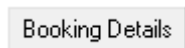
Booking Details

This button will allow you to view a Bookings details if a booking is selected.
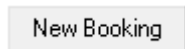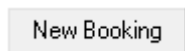
New Booking

This button will create a new booking once you highlight the times you wish to book.
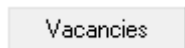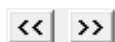
Vacancies

This shows all vacant bookings for either one or multiple facilities between a period of time and dates by applying filters. See Vacancies for further information.
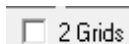
Booking Details

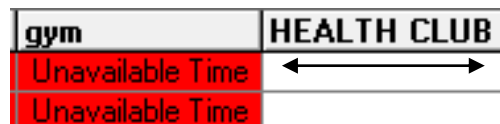This button will allow you to view a Bookings details if a booking is selected.
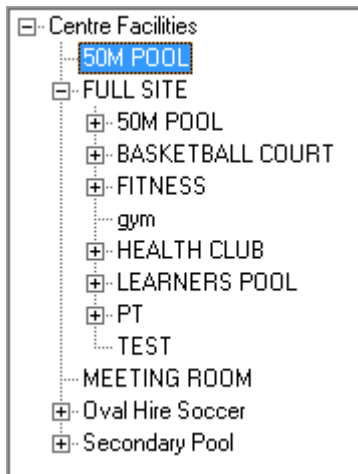
New Booking

This button will create a new booking once you highlight the booking times.

<< >>

This allows you to either increse or decrease the width of the colums that are on the screen.

gym	HEALTH CLUB
Unavailable Time	←——————→
Unavailable Time	

☐ 2 Grids

This allows you to split the view of the facilities into 2 grids.

The Facility Tree shows all facilities available.

The bombs allow you to expand and contract the facility tree.

If you run a multi location database, you will be able to filter the facility view by location.

The session display shows you the facilities availability, unavailability and current bookings. You are able to change the booking time by clicking and dragging. See Change Booking Times for further information.

Allows you to search for a booking via the booking number and will take you directly to the booking screen.

Will bulk send confirmation letters & emails, filtering by dates. See Bulk Confirmation Letters & Emails for more information.

Will bulk send the confirmation letters & emails, filtering by dates. See Bulk Confirmation Letters & Emails for more information.

Will export the session display panel to excel. This is good if a Duty Manager needs to know any areas to set up or who should be in certain areas.

This will let you search for a booking using filters to find a booking if the person cannot remember

	when they made their booking or for what time. See Booking Search for more information.
Attendances	The attendance button will shoe who has and who hasn't been marked as attended. In here you can mark as attended, unattend or bulk attend in his area, you can select days to view as well as by facility, see Mark a Booking as Attendance point 4
Close	Will close the Visual Facility Booking screen

Adding a Quick Key Button

1. Select a facility from the facility tree

```
□ Centre Facilities
  □ FULL SITE
    ⊞ 50M POOL
    ⊞ BASKETBALL COURT
    ⊞ FITNESS
      ·· gym
    ⊞ HEALTH CLUB
    ⊞ LEARNERS POOL
    ⊞ PT
      ·· TEST
  ·· MEETING ROOM
  ⊞ Oval Hire Soccer
  ⊞ Secondary Pool
```
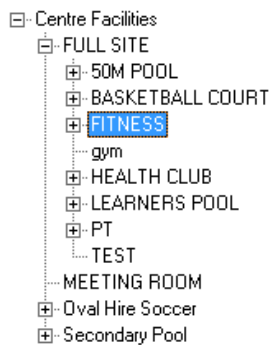
2. Right click on a blank quick key button and select current facility to button

Set current facility to button
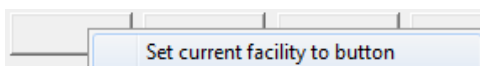
Editing a Quick Key Button

You have the ability to edit the quick key buttons you can:

- Add a background picture
- Remove background picture
- Set background colour
- Set current facility to button
- Clear Button

To add a Background Picture

1. Right click on the button and select Add background picture
2. Find the picture you wish to use on your computer

3. Select Open
4. Your picture will now be set as the button background

Removing a Quick Key Background Picture

1. Right click on the quick key button and select Remove background picture
2. The picture will now be removed

Setting a Quick Key Background Colour

1. Right click on the quick key button and select Set background color
2. Select a colour
3. Then select OK
4. That colour will now be your background colour

Setting the Current Facility to the Button

1. Go into a facility you wish to set as a quick key button
2. Right click on the quick key button
3. Select Set current facility to button
4. The button will now be set to that facility

Clearing a Quick Key Button

1. Right click on the quick key you wish to remove
2. Select Clear Button
3. The button will be cleared and ready for another facility to be set

Vacancies

The Vacancies screen shows all vacant bookings for either one or multiple facilities between a period of time and dates.

1. Select [Vacancies]
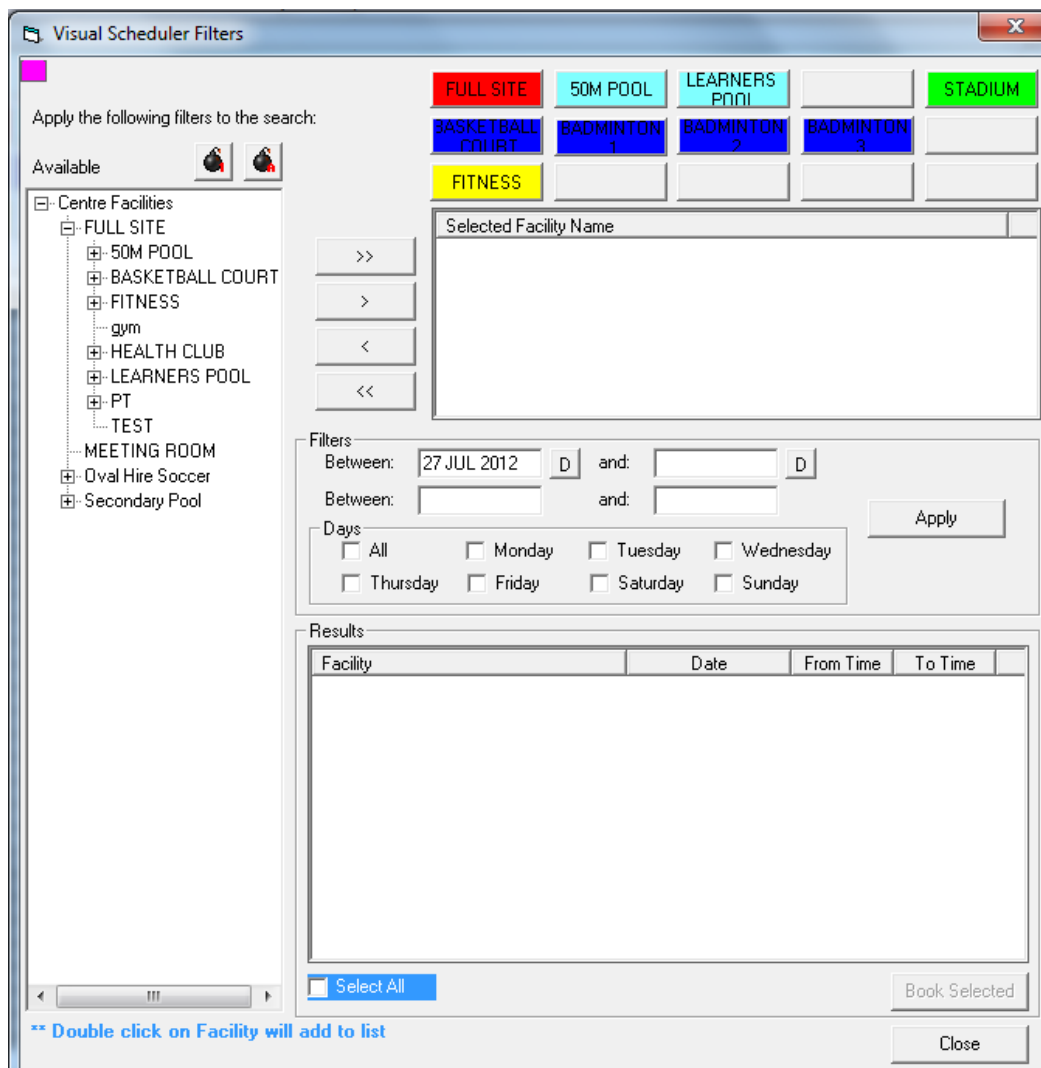
2. Select the facility you would like to add by double clicking it or by clicking on a facility and selecting [>]

3. If you wish to have all facilities selected select [>>]

4. To return a facility off the list select the facility on the right colum and select [<]

5. To remove all facilities selected, select [<<]

6. Once you have the facility or facilities you wish to search for vacancies in the selected facility Name column

7. You can now enter the dates to and from. Example if some one would like a booking that dose not have to be a set day enter a longer date range

   Between: 9 AUG 2012 [D] and: [ ] [D]

8. Enter the times between that you would like the booking to be at

Between:		and:	

9. Enter the day, if you have selected a whole week range for the date but you only want a Tuesday or a Thursday then tick those boxes

Days

☐ All	☐ Monday	☐ Tuesday	☐ Wednesday
☐ Thursday	☐ Friday	☐ Saturday	☐ Sunday

10. Select [Apply]

11. The results will show as below, for availability for the selected facility

Results

Facility	Date	From Time	To Time
☐ 50M LANE 1	Tue 14 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 1	Tue 14 Aug 2012	07:30 AM	08:00 AM
☐ 50M LANE 1	Tue 14 Aug 2012	08:00 AM	08:30 AM
☐ 50M LANE 1	Thu 16 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 1	Thu 16 Aug 2012	07:30 AM	08:00 AM
☐ 50M LANE 1	Thu 16 Aug 2012	08:00 AM	08:30 AM
☐ 50M LANE 2	Tue 14 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 2	Tue 14 Aug 2012	07:30 AM	08:00 AM
☐ 50M LANE 2	Tue 14 Aug 2012	08:00 AM	08:30 AM
☐ 50M LANE 2	Thu 16 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 2	Thu 16 Aug 2012	07:30 AM	08:00 AM

☐ Select All   [Book Selected]

12. Tick the boxes of the date and times you wish to book or tick [☐ Select All]

13. Then Select [Book Selected]

14. You will then be taken to the booking screen, to complete the booking details

Changing a Booking Time

To make life easier if you wish to change a booking time that is on the same day you can simply

1. Click on the booking that you wish to move
2. Hold down the left mouse button and drag the booking to the new time
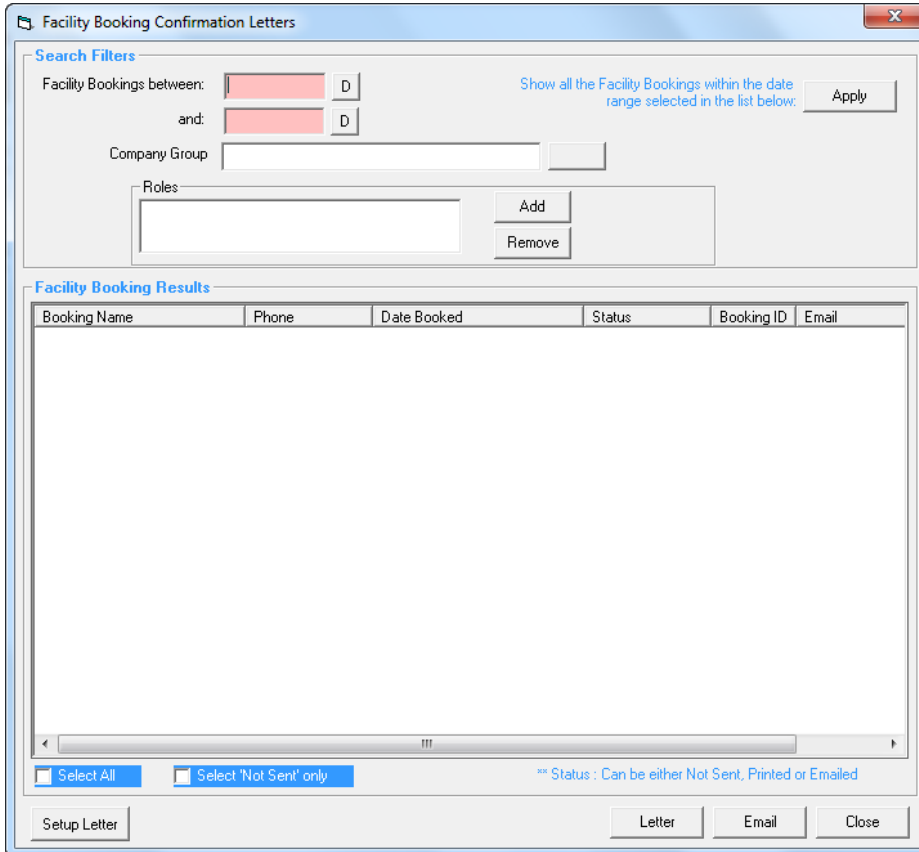3. Let go of the mouse key and the following screen will app
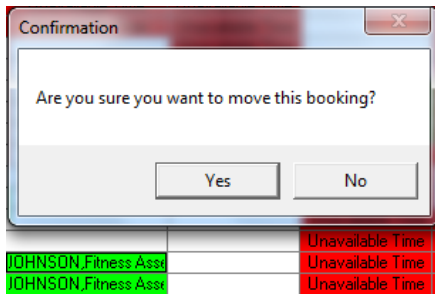
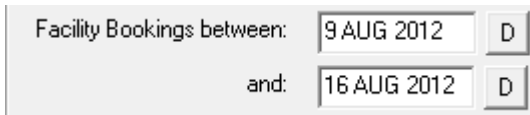4. Select Yes and the booking will move to the selected time

Bulk Confirmation Letter & Emails

This allows you to do a bulk confirmation of your bookings between a period of time.

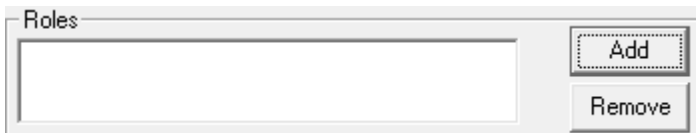1. Select **Print/Email Confirmation Letter**

2. Select a start date and end date that you wish to do confirmations from and to

3. Enter a **Company Group [_____]** if you had already set this up, See POS module

4. Add Roles if applicable

5. Select **Apply**

6. All the bookings will show in the selection pane

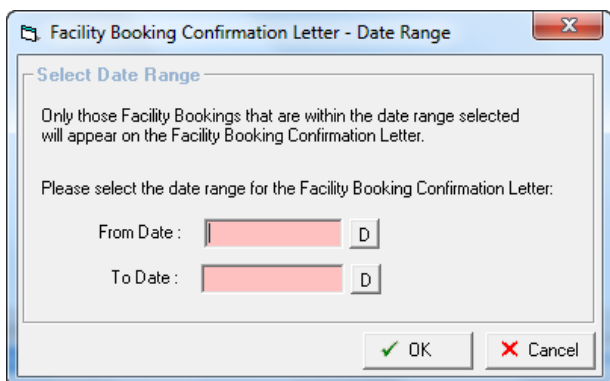| Booking Name	Phone	Date Booked	Status	Booking ID	Email
☐ ASCOT VALE TRI CLUB		24/07/2012 3:58:52 PM	Printed	297	peter@ascottricl
☐ ASCOT VALE TRI CLUB		9/08/2012 9:36:44 AM	Not Sent	322	peter@ascottricl
☐ ASCOT VALE TRI CLUB		24/07/2012 2:00:41 PM	Printed	296	peter@ascottricl
☐ SCHOOL		9/08/2012 9:39:16 AM	Not Sent	323	

7. You can select individual bookings that you want to send confirmations to by selecting the box next to the button or if you wish to send to all select tick Select all or Select 'Not Sent' only which will only select not sent letters

☐ Select All   ☐ Select 'Not Sent' only

8. Select [Letter] to send via letter and the following screen will appear

Print Facility Booking Confirmation Letters in Bulk

You have selected to print 2 Facility Confirmation Letters.

If you have selected a large number of letters to print, this may take several minutes.

Are you sure you want to continue?

[OK]   [Cancel]

9. Select Ok and the following will appear

Facility Booking Confirmation Letter - Date Range

Select Date Range

Only those Facility Bookings that are within the date range selected will appear on the Facility Booking Confirmation Letter.

Please select the date range for the Facility Booking Confirmation Letter:

From Date : [   ] [D]

To Date : [   ] [D]

[✓ OK]   [✗ Cancel]
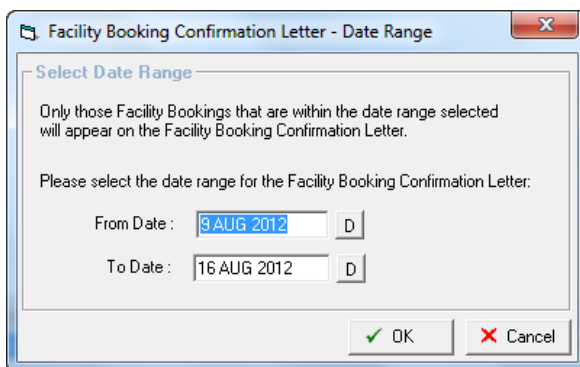
10. Enter the form and to dates
11. Select OK. The letters will be produced in word ready for you to print and send
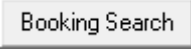12. For Email select [Email] the following will appear

Email Facility Booking Confirmation Letters in bulk

You have selected to send 4 Facility Confirmation Letters via email.

There are 1 bookings missing an email address.

If you have selected a large number of letters to email, this may take several minutes.

Are you sure you want to continue?

OK   Cancel

13. Select OK

Facility Booking Confirmation Letter - Date Range

Select Date Range

Only those Facility Bookings that are within the date range selected will appear on the Facility Booking Confirmation Letter.

Please select the date range for the Facility Booking Confirmation Letter:

From Date :   8 AUG 2012   D

To Date :   16 AUG 2012   D

✓ OK   ✗ Cancel

14. Confirm the From and to dates
15. Select OK
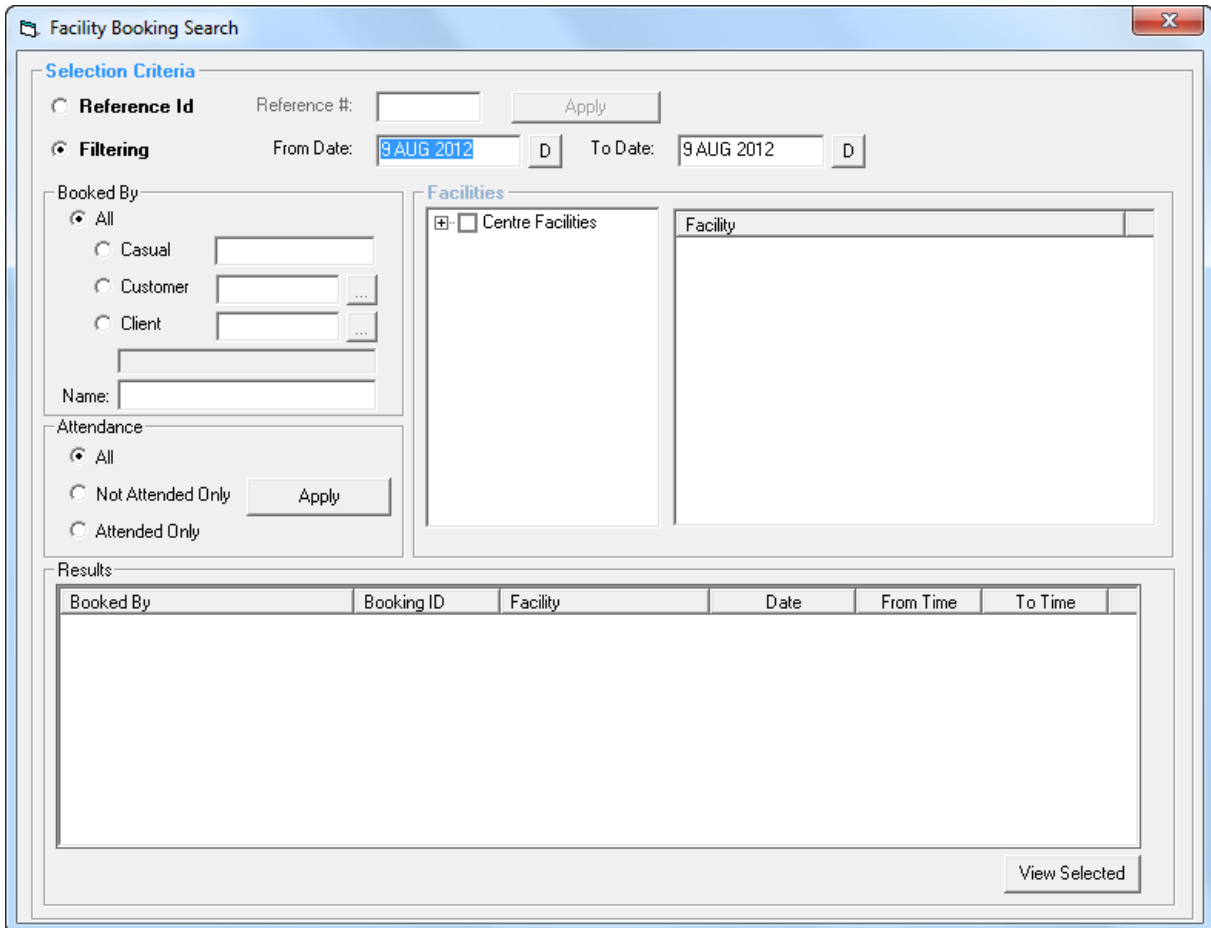
Booking Search

This option allows you to search for booking for a period of time.

Once you have selected the bookings you are able to view the details of the booking from this screen by selecting view selected
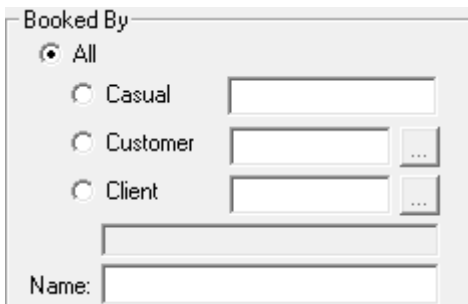
1. Select **Booking Search**

2. Enter the dates between you are looking for the booking

3. You can select who it was booked by, either all, casual, customer or client

4. You can search by attendance, either all, not attended or attended

5. You can add the facility, by selecting one or all

6. The selected facilities will then show in the selected facility column

7. To then view the bookings select [Apply] and any bookings within those parameters that you have set will appear

Booked By	Booking ID	Facility	Date	From Time	To Time
ASCOT VALE TRI CLUB	322	50M LANE 1	09 Aug 2012	07:00 AM	08:30 AM
ASCOT VALE TRI CLUB	322	50M LANE 2	09 Aug 2012	07:00 AM	08:30 AM
ASCOT VALE TRI CLUB	322	50M LANE 3	09 Aug 2012	07:00 AM	08:30 AM
SCHOOL	323	BASKETBALL COURT	09 Aug 2012	10:00 AM	11:30 AM
ASCOT VALE TRI CLUB	297	50M LANE 1	09 Aug 2012	12:00 PM	01:30 PM
ASCOT VALE TRI CLUB	297	50M LANE 2	09 Aug 2012	12:00 PM	01:30 PM
ASCOT VALE TRI CLUB	297	50M LANE 3	09 Aug 2012	12:00 PM	01:30 PM

8. To view the booking for any of the bookings found, select the booking and select
[View Selected] The booking screen will then appear so you can see more details of the booking or make change

Making a Booking

Creating a New Booking

1. Open up the Visual Facility Bookings Screen, POS> Facility> Visual Facility Bookings
2. Select the facility you wish to book from the Facility Tree or Quick Buttons
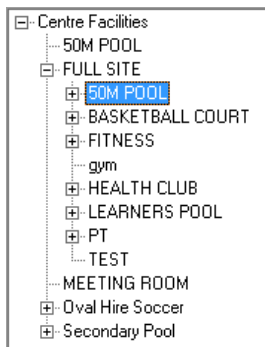
        Facility Tree   Quick Key Buttons
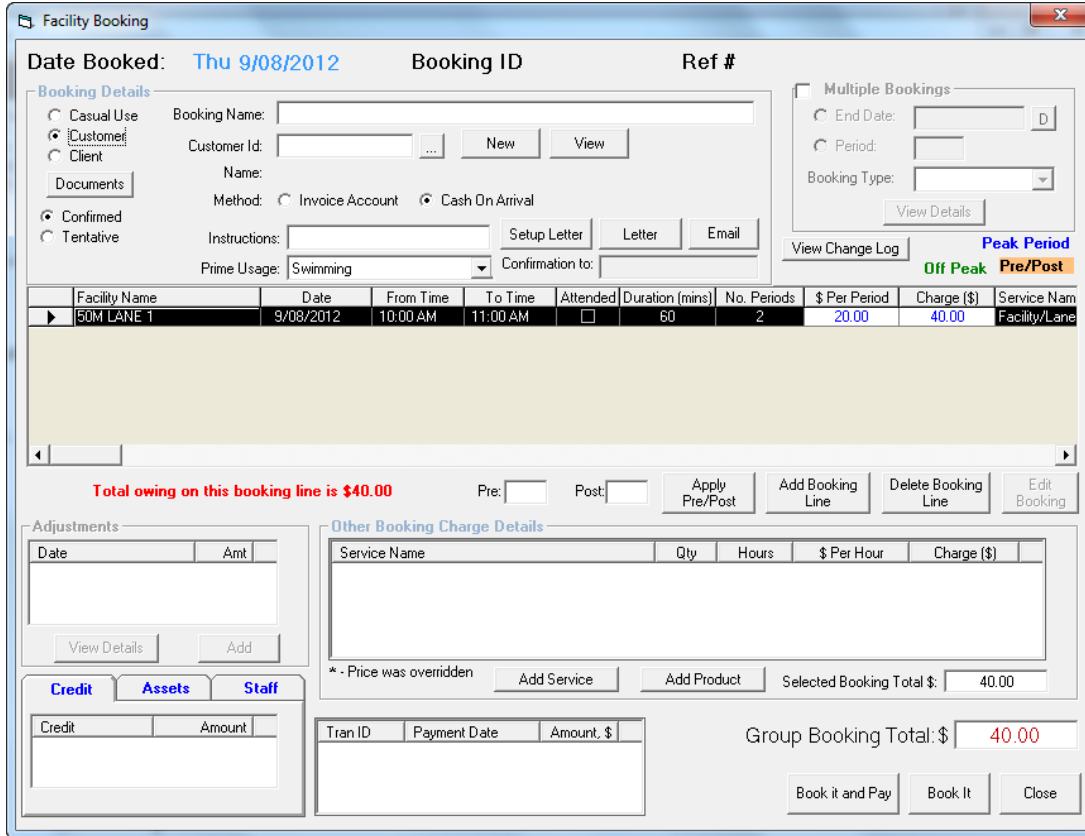
3. Select the date you wish to book

4. Highlight the times you wish to book

5. Select [New Booking] or you can right click on the highlighted time and select [Create booking] and the following screen will appear

Note: You can just select the start time and change the end time later in the booking line.

6. Select with what type of customer the booking is for, there are three type's of customers

Casual	Attends the facility intermittently and has no regular ongoing commitment to the facility
Customer	This is a person that is an existing customer within the database
Client	This can be an organisation, school, community group or regular user that would usually require an invoice

7. Now fill in the details of the booking following the instructions for each booking type

Casual Booking
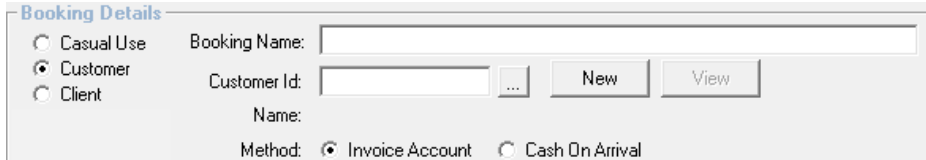
- Enter the Booking Name, this might be Triathlon training or Basketball Team

- Enter the Name, this is the contact person's name
- Enter the Phone number
- Enter the contact Details, this is the address where any correspondence can be sent
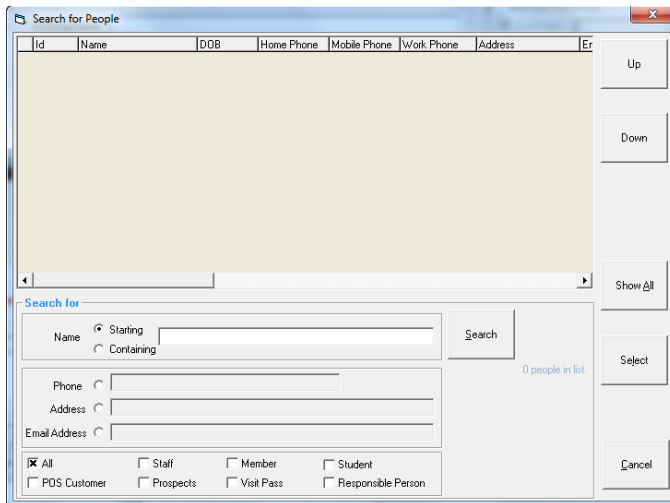- Select Prospect if you wish to add this person as a prospect

Customer Booking

- Enter the Booking Name, this might be Triathlon training or Basketball Team
- Search for an existing customer by selecting […] and the following screen will appear
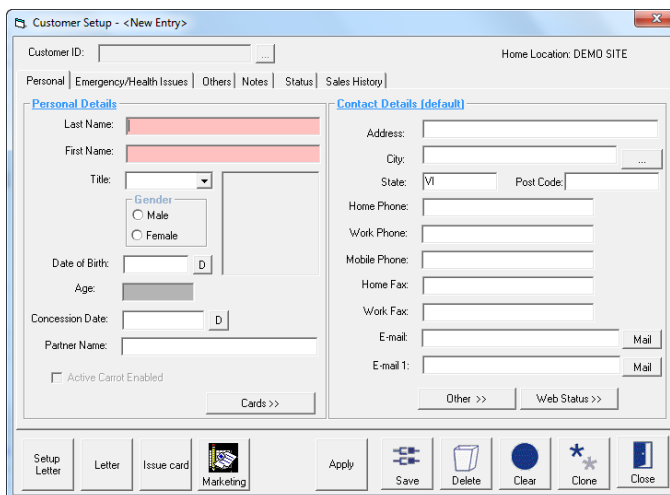
- Enter the customer's Surname and select Search
- Double click on the name to select
- To enter a new Customer Select [New] the following screen will appear

- Enter the customers details then select Save

- Select the Payment method Method: ⦿ Invoice Account   ○ Cash On Arrival

Client Booking

- Enter the Booking Name, this might be Triathlon training or Basketball Team
- Search for an existing client by selecting [...] and the following screen will appear

- Double click on the client to select
- To create a new client select [New] and the following screen will appear

- Enter the Client Details
- Select Save
- Select the clients status from the drop down box, this needs to have been set up in Admin manual, See Setting up Table Maintenance

Status:

- Select the Payment method   Method: ⦿ Invoice Account   ○ Cash On Arrival

7. Select Documents if you wish to add a document to this booking for further reference, see attaching a document

8. Select If this booking is Confirmed or Tentative, if the booking is made as a tentative booking it can be change when it is confirmed

⦿ Confirmed
○ Tentative

9. Add any instruction for the booking Instructions: [   ] , you can add checklist items by double click in the instructions field to access the Instructions/Checklist screen, Checklists have had to been set up in Admin> Site> Table Maintenance.
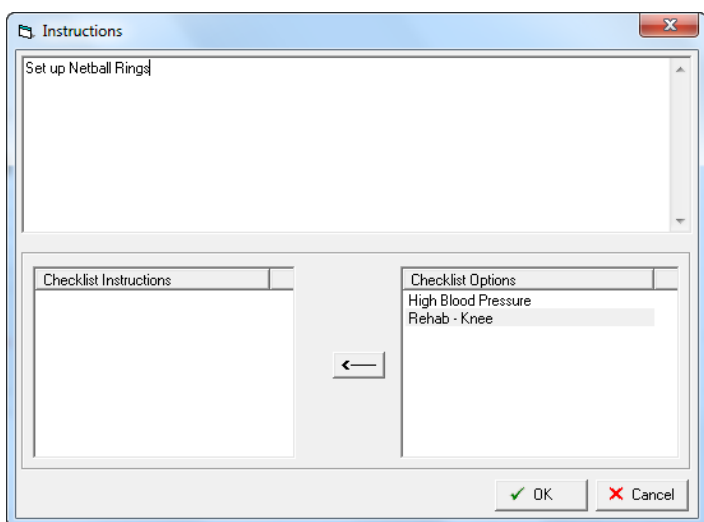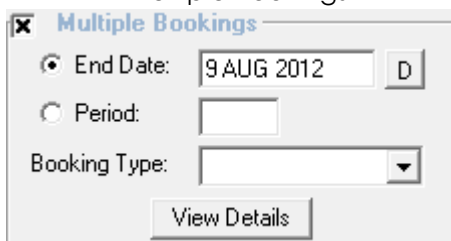

10. Select the Prime Usage from the drop down box

Prime Usage: Swimming ▼ , this is also set up in Admin Module, Table maintenance

11. Use Setup Letter   Letter   Email to send a confirmation email or letter, see Booking Confirmation

12. **Select Multiple Bookings if the booking is to occur more than** once, see Making Multiple Bookings

13. Make any changes to the booking line, The Booking Line shows you what you are booking and gives you the ability make changes

Facility Name	Date	From Time	To Time	Attended	Duration (mins)	No. Periods	$ Per Period	Charge ($)	Service Nam
Stadium	18/07/2012	08:00 AM	09:00 AM	☐	60	4.00	20.00	80.00	Events

Facility Name   This is the Name of the facility you are booking

Date   This is the Date of the Booking. You can change the date by clicking on the date and using the drop down box

From Time   This is the Start time of your booking. You can change the start time by clicking on the time and using the drop down box

To Time   This is the end time of your booking. You can change the end time by clicking on the time and using the drop down box, *if you only selected the start time when making the booking change the To Time*

Attended   You can select this to show the booking as already attended

Duration   This Shows the duration of the booking

No. Periods   This is how many periods are booked

$ Per Period   This is the charge per Period

Charge ($)   This is the amount to be charged for the booking, this is where you complete a Charge override, see Adding Charge Override

Service Name   This is the service name

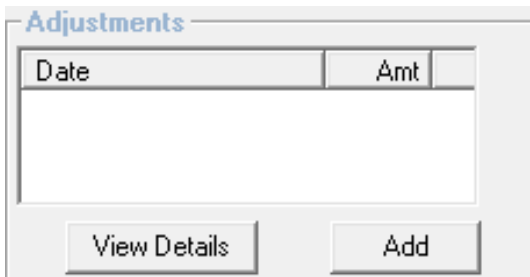14. **Add a Pre and Post time and then select Apply Pre/Post**

Pre: _____   Post: _____

If you have a booking that require setup or pull down before or after booking you may wish to block out times for which the facility is not available for booking. To block out the times, enter the amount of time you wish to have before (PRE) and after (POST) the booking for example 10 and 15 will block the facility for 10 minutes prior to the booking start time and for 15 minutes after the booking is completed. Pre and Post times apply no booking charges

15. Select [Add Booking Line] if you want to create another booking without having to go to the other facility and make a booking. See Add Booking Line

16. Select [Delete Booking Line] if you wish to cancel a specific booking line for multiple bookings, See Cancelling a Booking Line

17. Select if you want to Add or View any adjustments to the booking, this will create an increase or a reduction to the amount charged, see Adding a Facility Booking Adjustment

Adjustments	
Date	Amt

[View Details]   [Add]

18. Add any assets you wish to add to the booking, see Adding an Asset to a Booking

Credit	Assets	Staff
Asset Description		Qty

[Add]

19. Add if you are having a staff with this booking, See Adding a Staff Member to a Booking

Credit	Assets	Staff
Staff Members Name		

[Add]

20. Add any products or services to the booking, See adding a Product or Service to a booking

Other Booking Charge Details

Service Name	Qty	Hours	$ Per Hour	Charge ($)	

* - Price was overridden   [Add Service]   [Add Product]   Selected Booking Total $: 60.00

21. Now you can finalise the booking, either select [Book it and Pay] or [Book It]

Book It and Pay

Invoice account	If this was the payment method selected, the following screen will appear once ok is selected this amount will be placed on the account waiting to be invoiced, see Issuing an Invoice in point of sale
Cash on Arrival	If this was the payment method selected, the following screen will appear and you will be taken to the POS module to finalise the payment after OK is selected

Book It

Invoice account	If the payment method is Invoice account, the following screen will appear to show the booking has been made; no amount will be placed on account until the booking has been attended. Once attended you may then issue an invoice, see Mark a Booking as Attended and Issuing an Invoice
Cash on Arrival	If the payment method is Cash on Arrival, the following screen will appear to show the booking has been made; no payment will be

made until the booking has been attended. See Mark a Booking as Attended

Attaching a document

1. Click on Documents and the following screen will appear
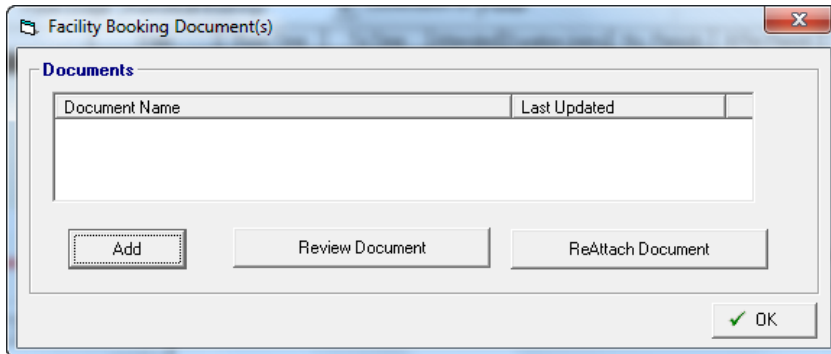
2. Click on the Add
3. Browse your computer and select the required file and select open
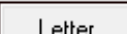4. Enter a description of the document you are entering
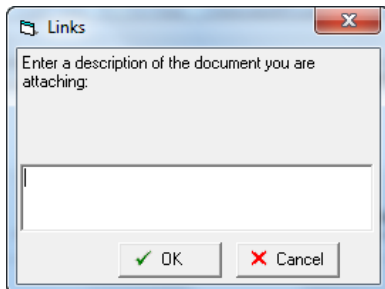
5. Click on OK which will take you back to the document screen
6. Click on OK

Booking Confirmation

Booking confirmations are letters or emails to confirm a booking, these can be used once the facility booking confirmation letter is setup this is done through Admin> Letters> Templates. See the Admin Module for setup.
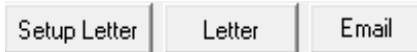
Letter Booking Confirmation
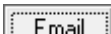
1. Select [Setup Letter] to choose the template you wish to use for this booking, this is used if you have multiple templates for booking confirmation letters otherwise just select [Letter]

2. The Facility Booking Confirmation Letter-Date Range will come up. Select a date range of the bookings you wish to include The default dates will be the dates of the first and last bookings
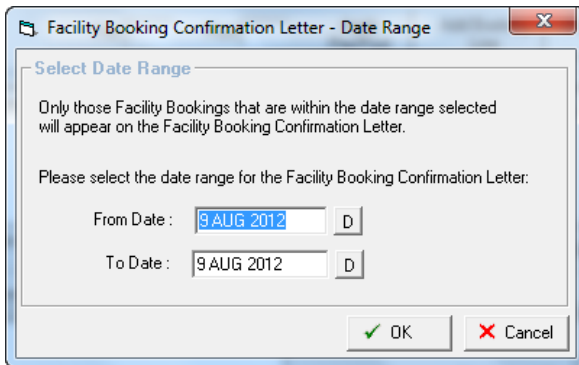
3. Select Ok
4. Your letter will now be created in word ready for you to print and send
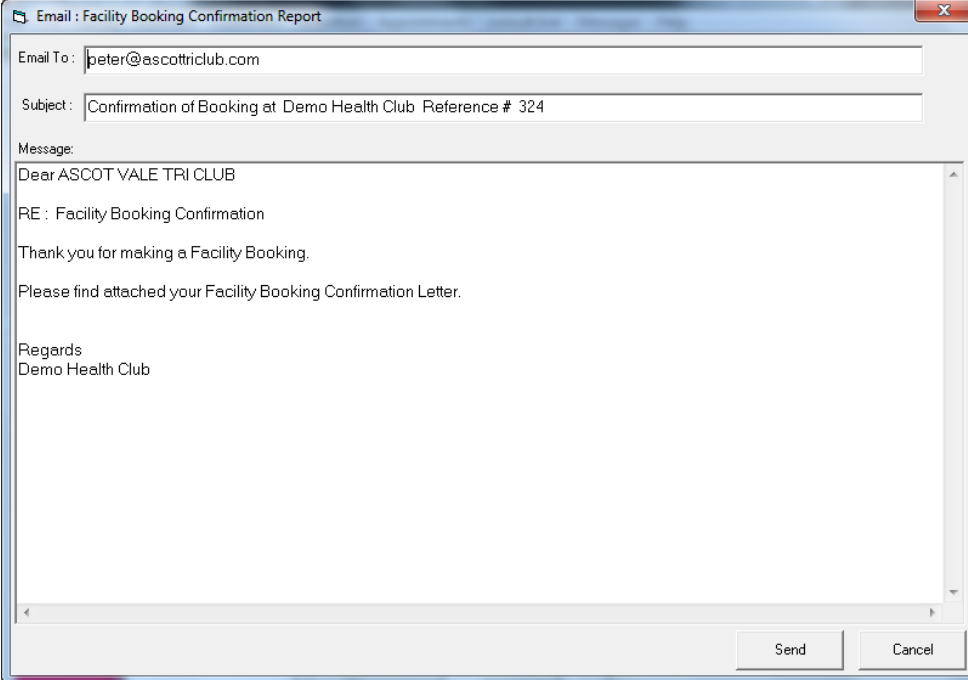
Email Booking Confirmation

There is also the option to send the booking confirmation via Email as an attachment

1. Select [Email] and The Facility Booking Confirmation Letter-Date Range will come up. Select a date range of the bookings you wish to include The default dates will be the dates of the first and last bookings
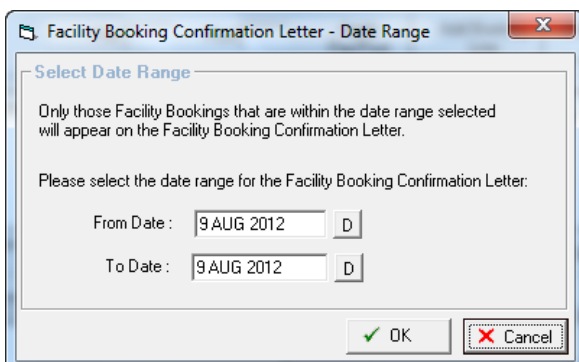
2. Select Ok and the following Email confirmation report will appear
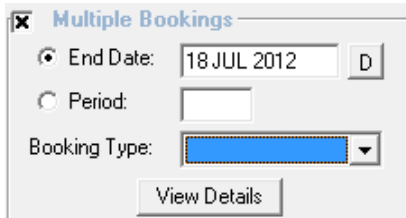
3. Edit if necessary and then Select Send and the email will be sent with the booking confirmation letter attached

Multiple Bookings

When making a booking you are able to booking the facility in advance for a multiple period of time. An end date or a period of time is able to be select to show the system for how long the multiple booking is to go for.
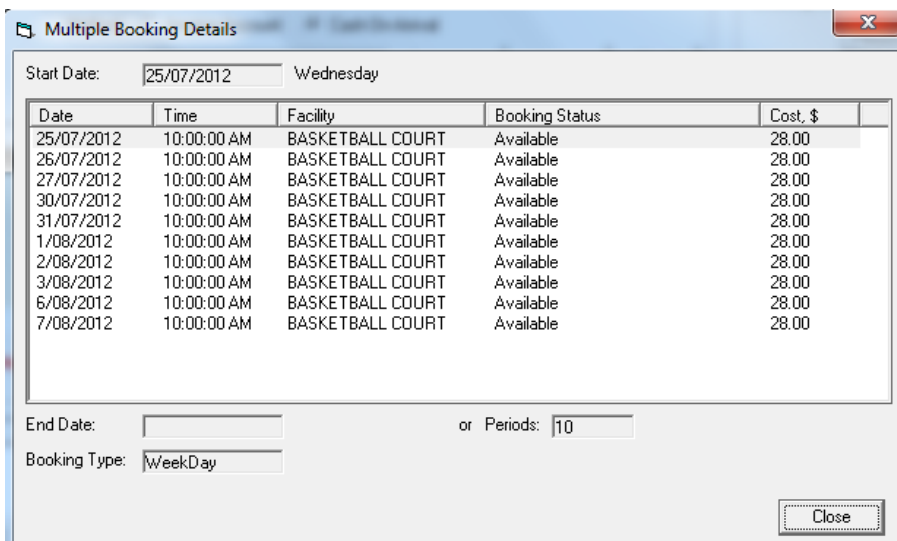

1. Select
2. Select the length of the booking this is by end date or periods

End Date   Enter the date you wish the booking to end i.e. 18th July 2012

Period   Enter the number of times you wish the booking to occur i.e. 5

3. Enter the Booking Type this will last until the specified date or number of periods
4. Select View Details

For example: A Multiple bookings for the Basketball Court for 2 periods of 30 minutes from 10am to 11am every weekday starting on the 25rd of July for 10 Periods.
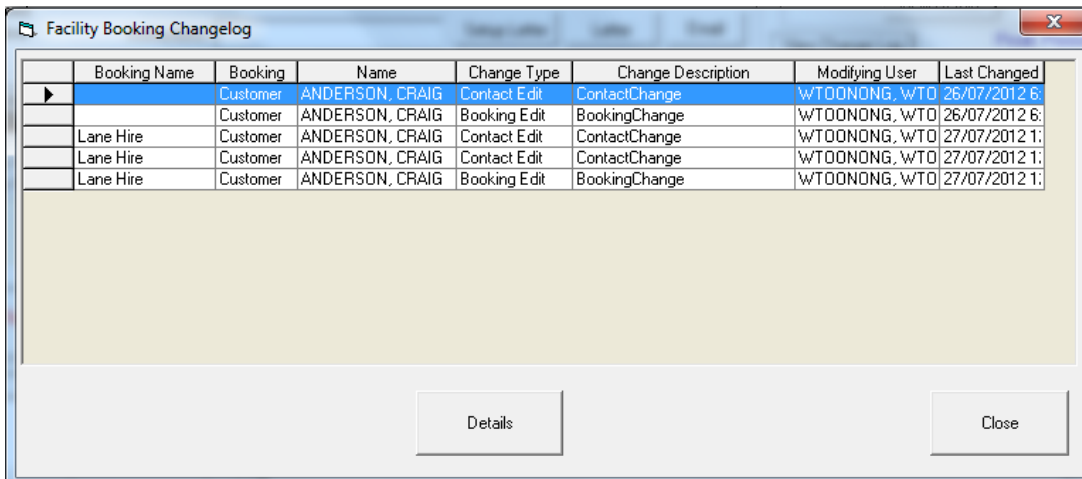
This will show if those bookings times are Available are Unavailable

5. Select Close

View Change Log

This option is in the booking details screen when this is selected it will show any changes that have been made to that particular booking.
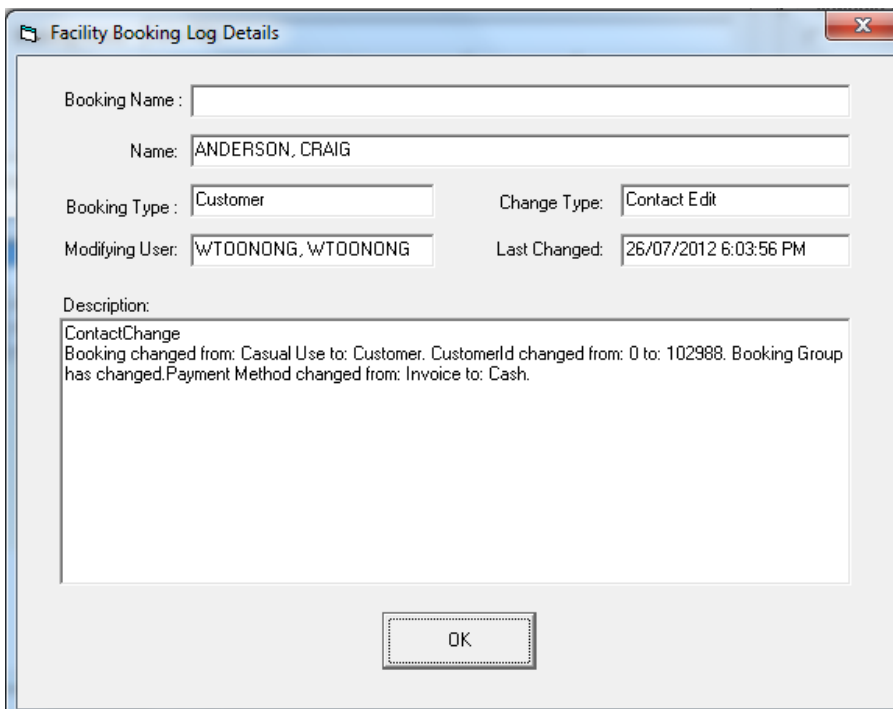
1. Select View Change Log

2. Select a change line and then select the details button and the follows screen will appear showing the details of the change made

3. Select Ok to return to change log
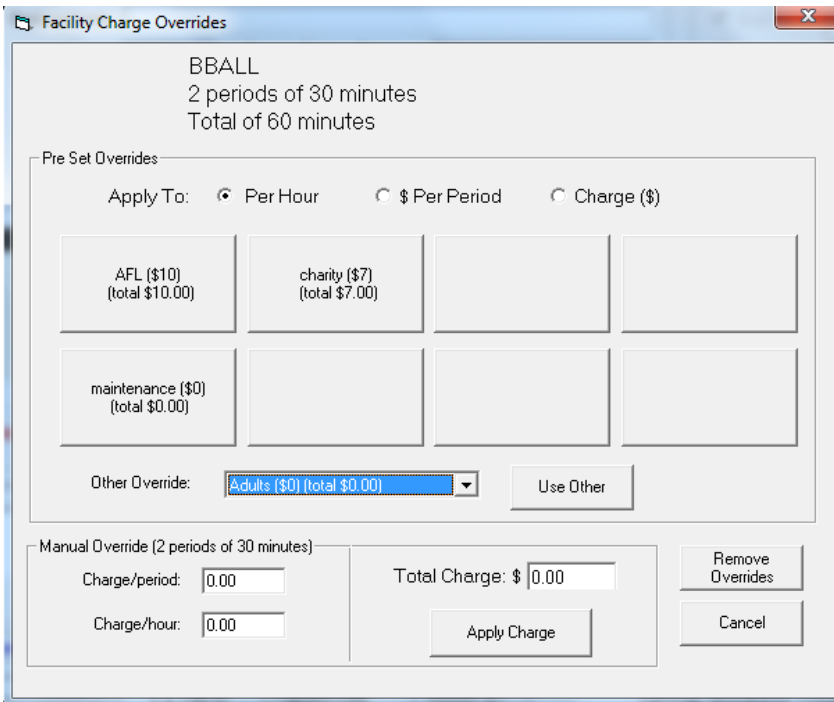4. Select Close once finished viewing any changes made

Adding Charge Overrides

This is so you can change the price of the booking, i.e. you charge a different rate for Non for Profit companies. The override prices need to have been created in facility set up

Note: When making any override this amount would apply to the amount of periods being booked. If Charge is selected the override amount will apply to the whole booking no matter how many periods in the booking line.

1. Double click on the Charge amount

Facility Name	Date	From Time	To Time	Attended	Duration (mins)	No. Periods	$ Per Period	Charge ($)	Service Nam
Stadium	17/07/2012	07:00 AM	08:00 AM	☐	60	4	20.00	80.00	Events

2. The charge override screen will appear

3. Select the button that has the override price you wish to charge
4. If all buttons are blank select the Drop down from the "Other Override"

5. Once it is selected right click on a blank button and click set to other override which will show the override price on that button
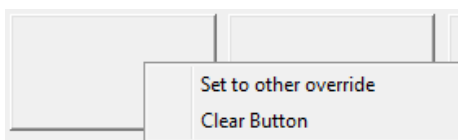
6. If happy then select the button to use that charge override

7. If none of the buttons are appropriate for this booking you have the option to enter a Manual Override


8. You can enter either: Charge/period, Charge/hour or Total Charge which will auto fill the other two fields
9. Select Apply Charge
10. If you wish to remove the Override double click on the charge amount
11. Select Remove Overrides
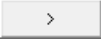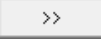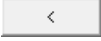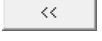12. The charge will now revert back to the original booking price

Adjusting Bookings

Adding a Booking Line

This function gives you the ability to add another facility booking to this booking without having to create another whole booking

1. Select [Add Booking Line]
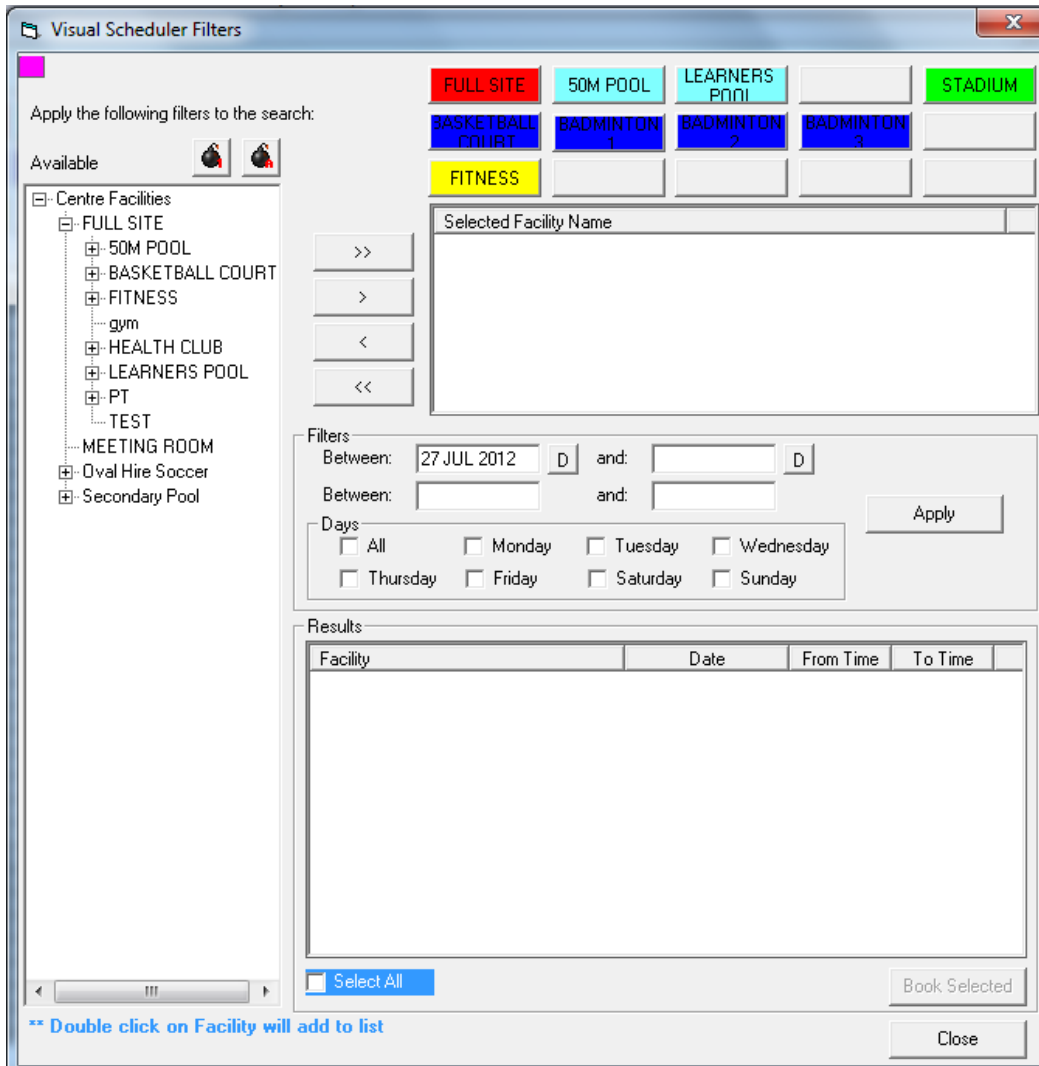
2. Select the facility you would like to add by double clicking it or by clicking on a facility and selecting [>]

3. If you wish have all facilities selected select [>>]

4. To return a facility off the select list select the facility and select [<]

5. To remove all facilitys selected use [<<]

6. Once you have the Facility or facilities you wish to search a vacancies for they will appear in the selected facility Name column

Selected Facility Name

7. You can now enter the dates to and from. Example if some one would like a booking that dose not have to be a set day enter a longer date range

| Between: | 9 AUG 2012 | D | and: | | D |

8. Enter the times between that you would like the booking to be at

| Between: | | and: | |

9. Enter the day, if you have selected a whole week range for the date but you only want a Tuesday or a Thursday then tick those boxes

Days
- [ ] All   [ ] Monday   [ ] Tuesday   [ ] Wednesday
- [ ] Thursday [ ] Friday   [ ] Saturday   [ ] Sunday

10. Select **Apply**
11. The availability for the selected facility will now show

Results

Facility	Date	From Time	To Time
☐ 50M LANE 1	Tue 14 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 1	Tue 14 Aug 2012	07:30 AM	08:00 AM
☐ 50M LANE 1	Tue 14 Aug 2012	08:00 AM	08:30 AM
☐ 50M LANE 1	Thu 16 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 1	Thu 16 Aug 2012	07:30 AM	08:00 AM
☐ 50M LANE 1	Thu 16 Aug 2012	08:00 AM	08:30 AM
☐ 50M LANE 2	Tue 14 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 2	Tue 14 Aug 2012	07:30 AM	08:00 AM
☐ 50M LANE 2	Tue 14 Aug 2012	08:00 AM	08:30 AM
☐ 50M LANE 2	Thu 16 Aug 2012	07:00 AM	07:30 AM
☐ 50M LANE 2	Thu 16 Aug 2012	07:30 AM	08:00 AM

☐ Select All   Book Selected

12. Tick the boxes of the date and times you wish to book or tick ☐ Select All

13. Select **Book Selected**
14. This will now show as a new booking line

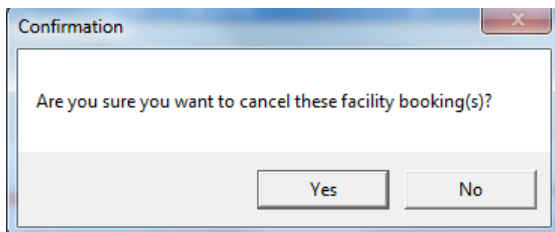| Facility Name	Date	From Time	To Time	Attended	Duration (mins)	No. Periods	$ Per Period	Charge ($)	Service Nam
BASKETBALL COURT	23/07/2012	03:00 PM	04:00 PM	☐	60	2.00	14.00	28.00	FACILITY RE
gym	23/07/2012	03:00 PM	04:00 PM	☐	60	2.00	50.00	100.00	Facility/Lane

Cancelling a Booking Line

This function allows you to cancel a booking line.

1. Select the line of the booking you wish to cancel

Facility Name	Date	From Time	To Time	Attended	Duration (mins)	No. Periods	$ Per Period	Charge ($)	Service Nam
BASKETBALL COURT	23/07/2012	03:00 PM	04:00 PM	☐	60	2.00	14.00	28.00	FACILITY RE
gym	23/07/2012	03:00 PM	04:00 PM	☐	60	2.00	50.00	100.00	Facility/Lane

2. Select [Cancel Booking Line]

3. The following will appear to confirm cancel

Confirmation

Are you sure you want to cancel these facility booking(s)?

[Yes] [No]
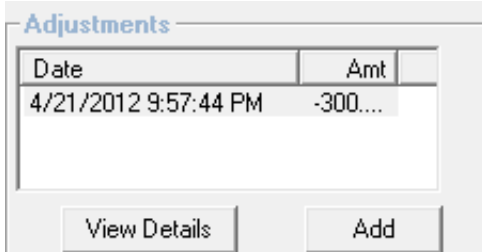
4. Select Yes to procced and the booking will now be cancled and removed from the booking line

Facility Name	Date	From Time	To Time	Attended	Duration (mins)	No. Periods	$ Per Period	Charge ($)	Service Nam
BASKETBALL COURT	23/07/2012	03:00 PM	04:00 PM	☐	60	2.00	14.00	28.00	FACILITY RE

Adding a Facility Booking Adjustment
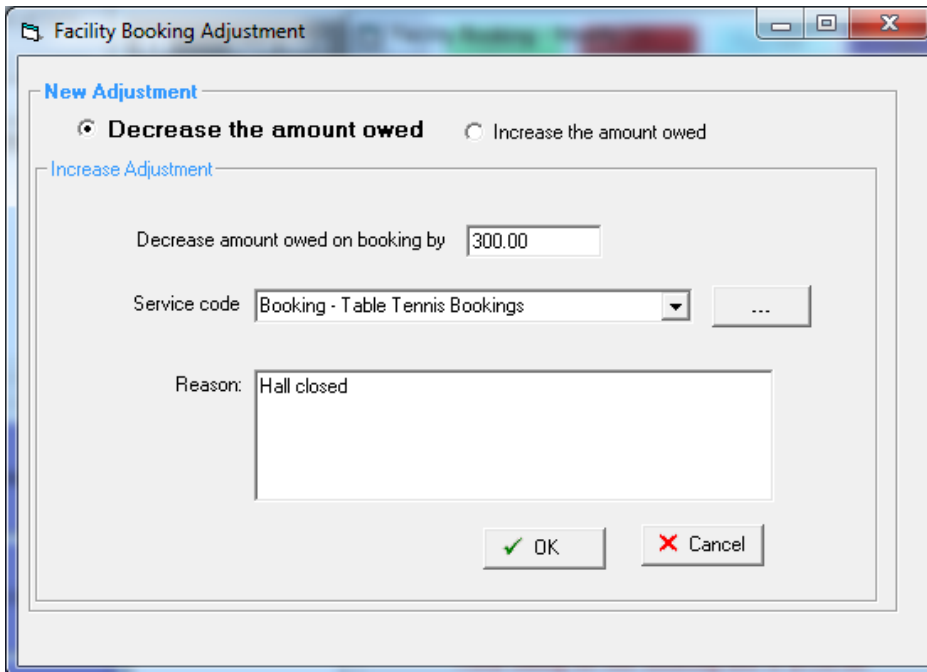
This allows you to make adjustments to a booking that will create a reduction or increase to the amount charged. This is done from the booking screen in the adjustments window.

1. Select Add
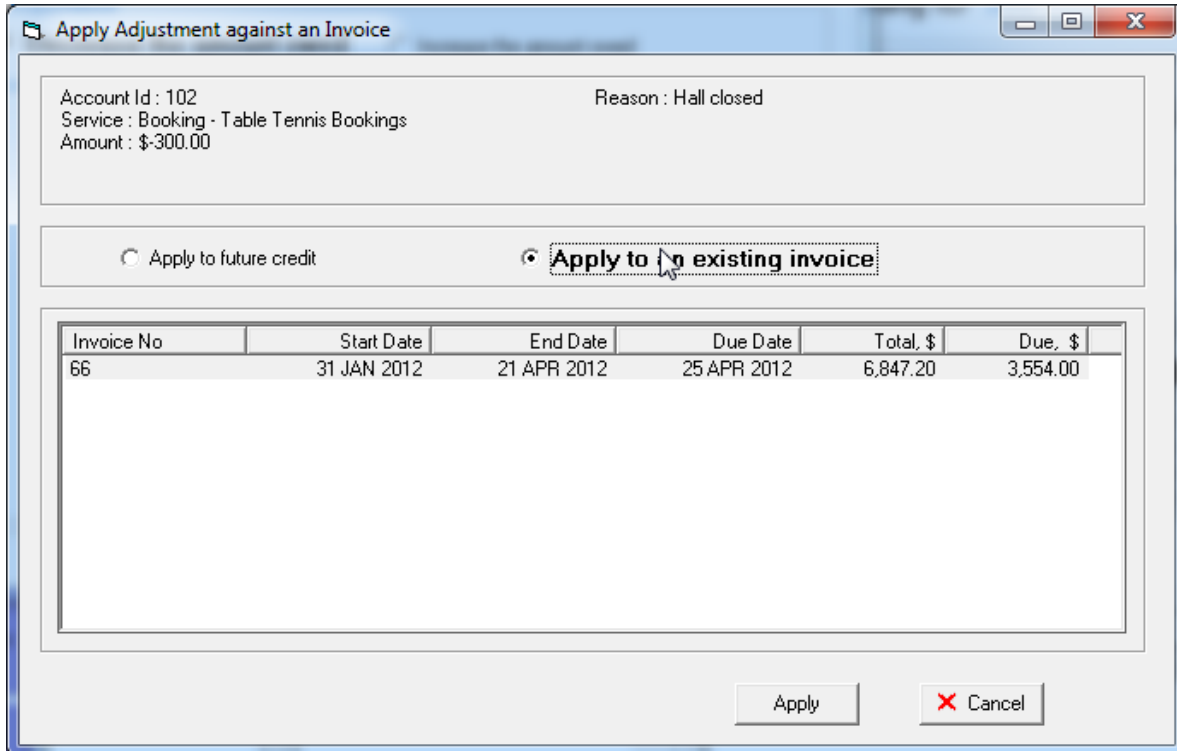
2. Select either Decrease the amount owed or Increase the amount owed
3. Enter the amount to be decreased or increased
4. Enter the service code for the adjustment from the dropdown if it exists in one of the booking lines. Otherwise search for any available service code using the search button ⬚ This will add the service code to be selected in the dropdown
5. Enter a reason for the change
6. Select OK

7. Select either Apply to future credit or Apply to existing invoice
8. Select Apply

Adding Assets to a Booking

This is to add any particular assets to a booking, this may be netball rings for stadium use or kickboards for pool use, providing that during facility set up this has been done.

1. Select Assets Tab
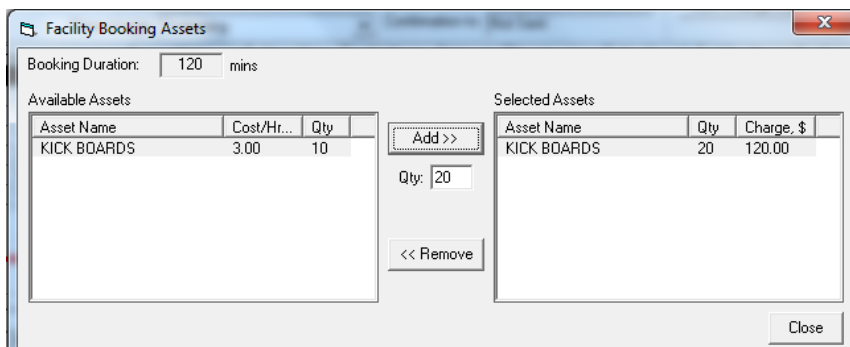
2. Select Add

3. Select the relevant asset

4. Specify how many are required (the Qty)
5. Select Add
6. To remove the selected asset, select on it and select Remove
7. Select close and the asset will now show in the Other Booking Charge Details panel

Other Booking Charge Details

Service Name	Qty	Hours	$ Per Hour	Charge ($)
Assett Hire	20.00	2.00	3.00	120.00
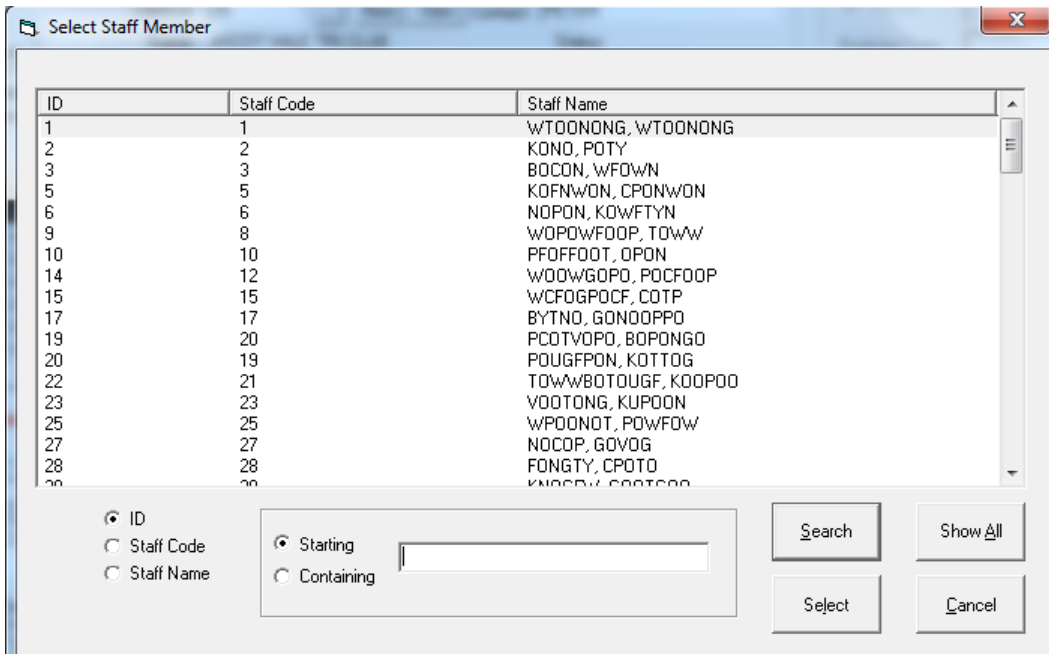
Adding a Staff Member to a Booking

Adding a Staff member to a booking allows you to charge the client a specific rate to have a staff member present for that booking, this has to have been set up during Facility Setup Admin> Facility> Facility Setup.

1. Select the Staff Tab

2. Select Add
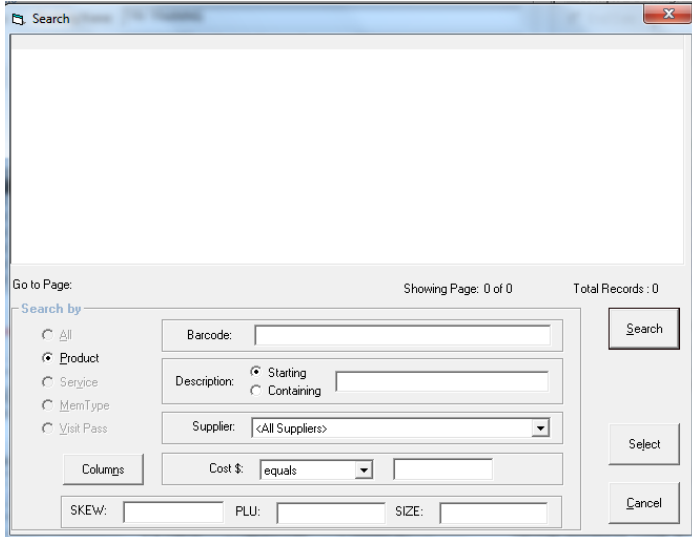
3. Select the Staff member by double clicking on their name, the staff booking will now show in the Other Booking Details Panel

Adding a Product or Service to a Booking

Adding a product or service allows you to add products or services to a booking i.e. a child swim or birthday cake.

1. Select or

2. Search for the product or service, then double click on it

3. Select the quantity of the product or service
4. Select Ok and the product or service will now be added to the Other Booking Charge Panel
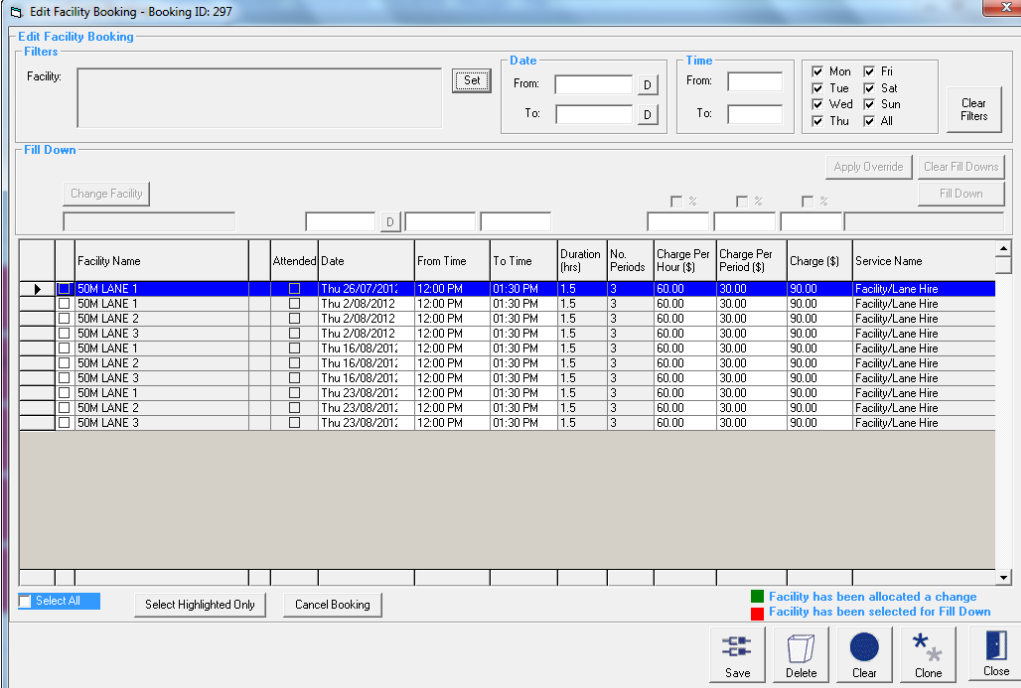
Multi Editing a Booking

The Facility Multi Edit screen allows you to make bulk changes to bookings.

You can access this by clicking on the [Edit Booking] button located on the facility booking screen, the following screen will appear:

This screen gives you the ability to make bulk changes to your facility bookings by selecting the appropriate booking lines using the checkboxes and doing the following before clicking the [Fill Down] button to execute the changes.

Changing the facility a booking line is assigned to

This can be done by clicking the [Change Facility] button and selecting the facility you wish to change to from the tree that will display
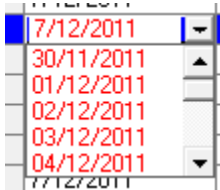

Changing the date

By using the ![D] to select the new date or typing the date you wish to change to. It will default to the format ![9 FEB 2012] ![D]

You can also make changes to individual lines by clicking on the field you wish to alter and using the drop down or by typing in the field manually.

Changing the time

By typing in the new from and to times in the fields above these columns. The time will default to the format ![10:00 AM] ![12:00 PM]

The times can also be modified individually by clicking on the field you wish to alter and using the dropdown or by typing manually into the field. The times will default to valid booking times for that facility.
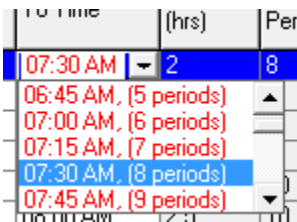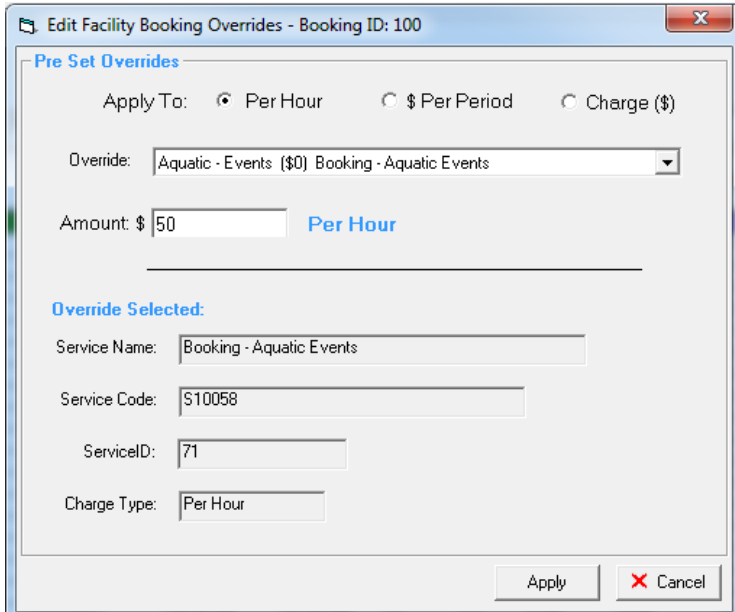

Changing the charges

By typing into one of the charge type fields at the top of the charge columns

(NB: You can only change one charge type at a time)

The other charge columns will update to reflect any changes made to the modified charge column. You can also overtype the charges for individual booking lines.
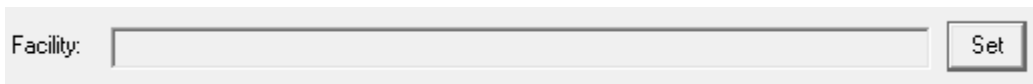
1. Change the service code override by clicking the ![Apply Override] button and selecting the new override from the list
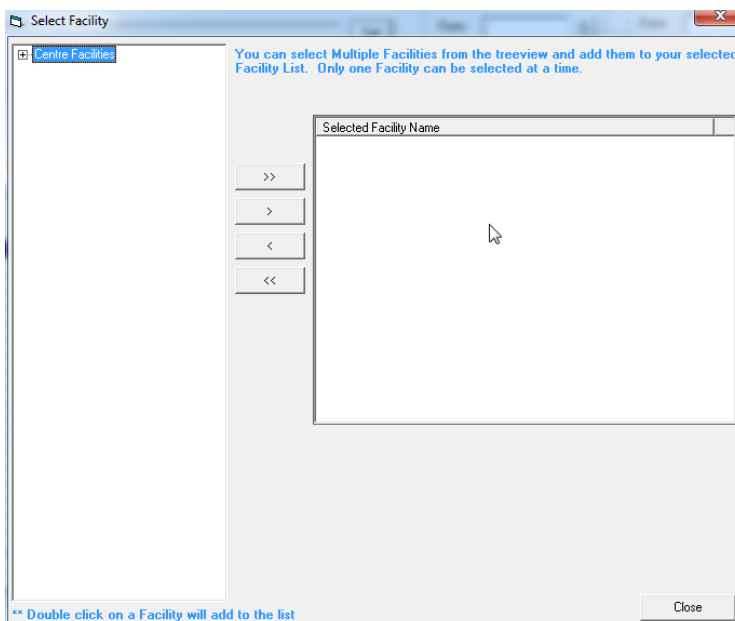
2. The charge type (per hour, per period, or total charge) and amount can also be designated from this screen

Note: Times and Facilities cannot be bulk changed if they have differing period durations or timetabling

To help aid the selection of appropriate booking lines to be altered filters can be used to reduce the number of booking lines displayed:

By clicking the [Set] button, facilities can be chosen to filter the list with:

Facilities can be moved by clicking the arrow buttons or double clicking on a facility
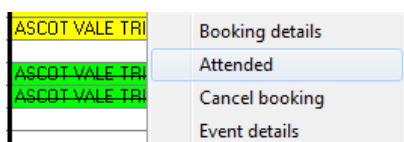
Times and Dates can also be entered as above to filter

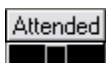To clear the filters click the [Clear Filters] button

Attending a Booking

There are four ways that you are able to mark a facility as attended

1. Use the mouse and right click on the relevant booking, select attended

2. Open the booking details and tick the attended option in the booking line

3. By selecting the Facility Bookings Function option on the touch screen in POS. This button will have to be setup through the Touchscreen setup prior.
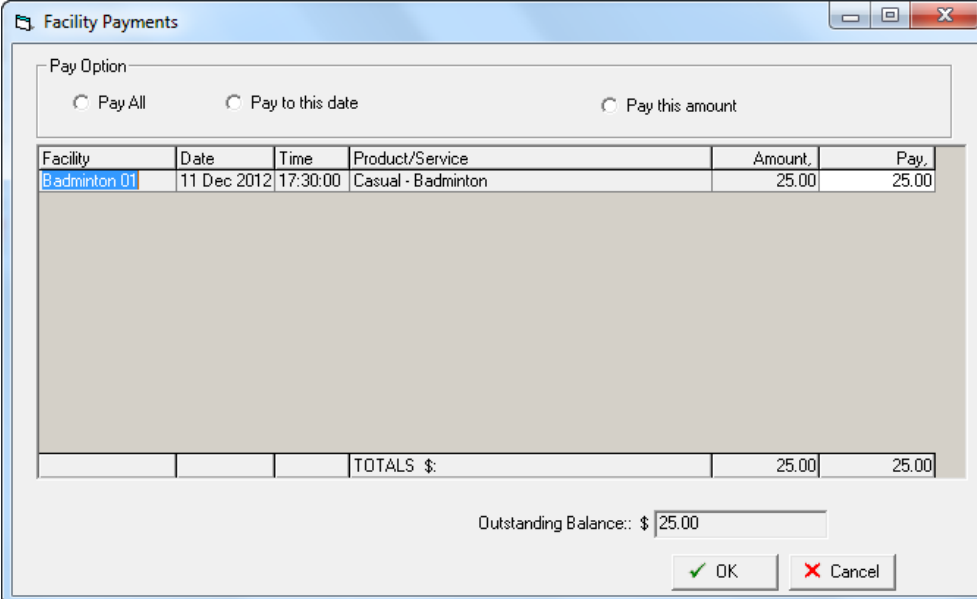

When this option is selected the following screen will appear. This screen shows all the booking that are booked for that day but not yet attended

To make the booking shown as attended, click on the booking. If the booking has already been paid for it will disappear and be marked as attended

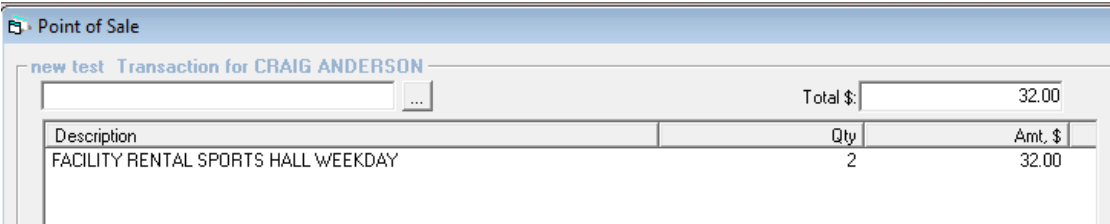If the booking hasn't been paid for the following screen will appear:

Select ok if this is the amount that is to be paid and you will be taken to the POS module. This amount will now be in the transaction line and you are able to take a payment.
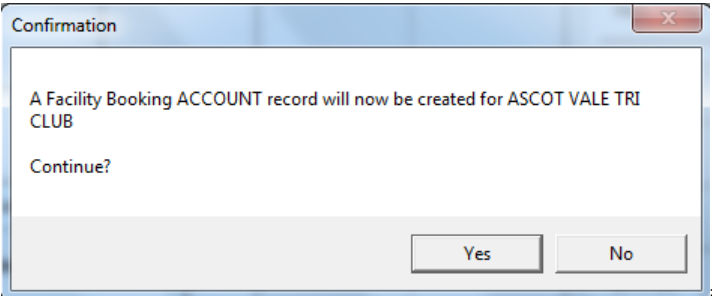

If the booking is to be put on account (this needed to be selected when making the booking Invoice Account) the following will appear:

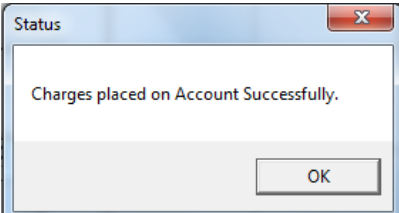4. Select the Attendances [Attendances] button on the Visual Facility Booking screen

When this is selected the following screen will show, this will show all Facility bookings, you can filter by date, facility and also for only unattended.
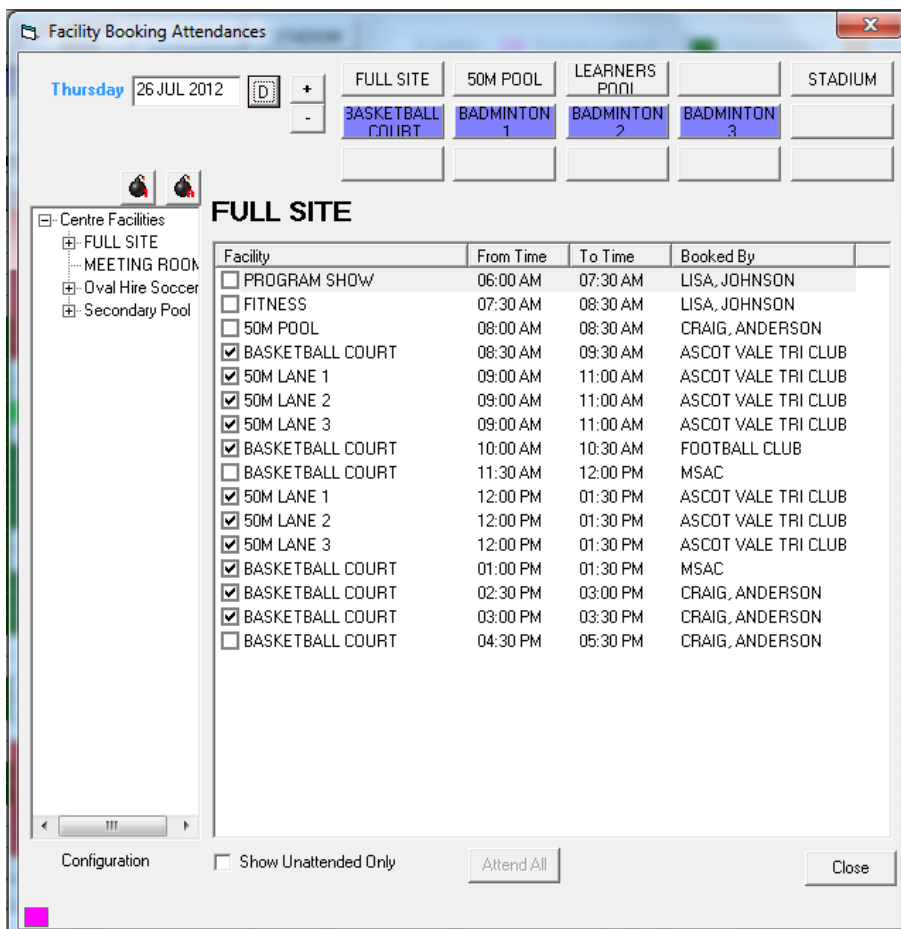
To attend booking tick the check box next to the facility, to do bulk attendance select Show Unattended Only

Select All Bookings for Invoice

Select Attend All
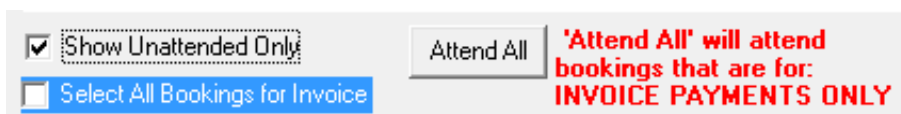
Note you can only attend all bookings for invoice only

If the Payment option was not Invoice but cash on arrival you can mark the booking as attended though you will be taken to POS to process the payment