

## Table of Contents

Point of Sale Overview .....	3
Till Setup .....	4
General Tab.....	4
Printer/Cash Drawer Tab .....	6
Appearances Tab .....	7
PC-EFTPOS Tab .....	8
Post Code Validation .....	9
Touch Screen Layout .....	9
Creating a New Touch Screen Layout .....	11
POS Options.....	19
Opening the Till/Touch Screen.....	19
Secure Till Offs.....	20
Setting Alternate Price.....	22
Retrospective Adjustment .....	23
Consolidation .....	24
Attendance Summary .....	25
Holding and Retrieving Transactions .....	27
Assigning a Sale to a Customer .....	29
Transaction Maintenance .....	31
Finding a Previous Transaction.....	31
Visual Facility Bookings .....	38
Appointments .....	39
Making Appointments.....	39
Editing a booking .....	40
Cancelling a booking.....	40
Moving a booking .....	40
Extending a booking time's length .....	40
Marking an Appointment as attended.....	41
Vouchers.....	41
Issuing a voucher .....	41
Voucher Maintenance.....	42
Void a Voucher .....	43
Laybys.....	44
Creating a New Layby .....	44
Layby History.....	46
Visit Passes.....	50
Issuing a Visit Pass .....	50

Maintaining a Visit Pass (VP).....	51
Finding a Visit Pass by Contract Id .....	53
Selling a membership .....	54
Adding a Prospect .....	57
Customer Set Up Screen .....	58
Personal Tab .....	58
Emergency/Health Tab .....	61
Others tab .....	62
Notes Tab .....	63
Status Tab .....	64
Sales History Tab.....	64
Customer Marketing Details.....	65
Client set up .....	66
General Tab.....	66
Contact Tab .....	66
Manager Roles Tab .....	66
Comments Tab .....	67
Accounts.....	68
Issuing an Invoice .....	70
Bulk Invoice Issue .....	71
Apply credit to invoices .....	73
Viewing Credit Information .....	74
Unissuing an Invoice.....	75
Invoices Maintenance.....	76
Messages .....	77
Messages > Customer > New Message .....	77
Messages > Customer > View Customer Message.....	80
Messages > Bulk > New Bulk Message .....	81
Messages > Bulk > View Bulk Message .....	83
Messages > Staff > New Staff Message .....	84
Messages > Staff > View Staff Messages .....	85
Messages > Staff > View Messages for Roles .....	86
Bulk Card Print for Members/Students and VP holders.....	87
Access Troubleshooting .....	88
RFID Access Troubleshooting .....	88

## Point of Sale Overview

Links Modular System allows for Point of Sale (POS) to be executed in three different ways Keyboard, Touch Screen or Touch Pad.

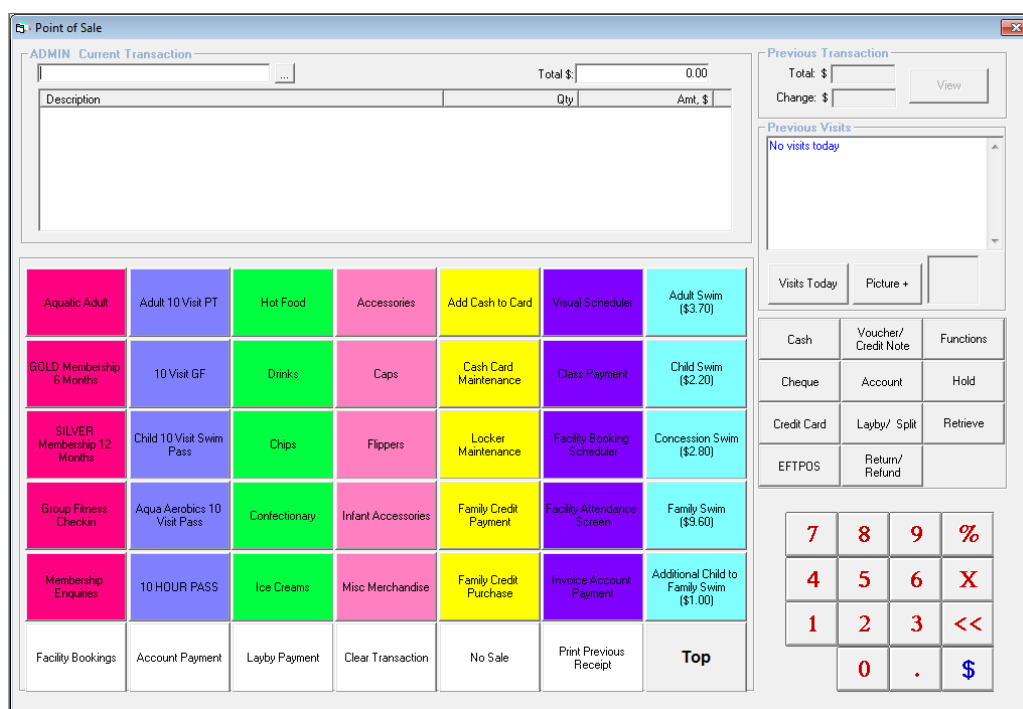
All transactions can be processed via POS and payment can be taken via Cash, Cheque, EFTPOS, Credit Card, Voucher/Credit Note or Account Payment.

The POS can be formatted to display with an emphasis on cash keys, function keys or the large screen which will display both.

Various multi-functional POS tills can be created and displayed as required depending on the environment in which they are to be utilised and the touch screen allows for unlimited layering of functionality.

Each button performs an individual processes ranging from the sale of a product to providing a discount to registering a member/student visit.

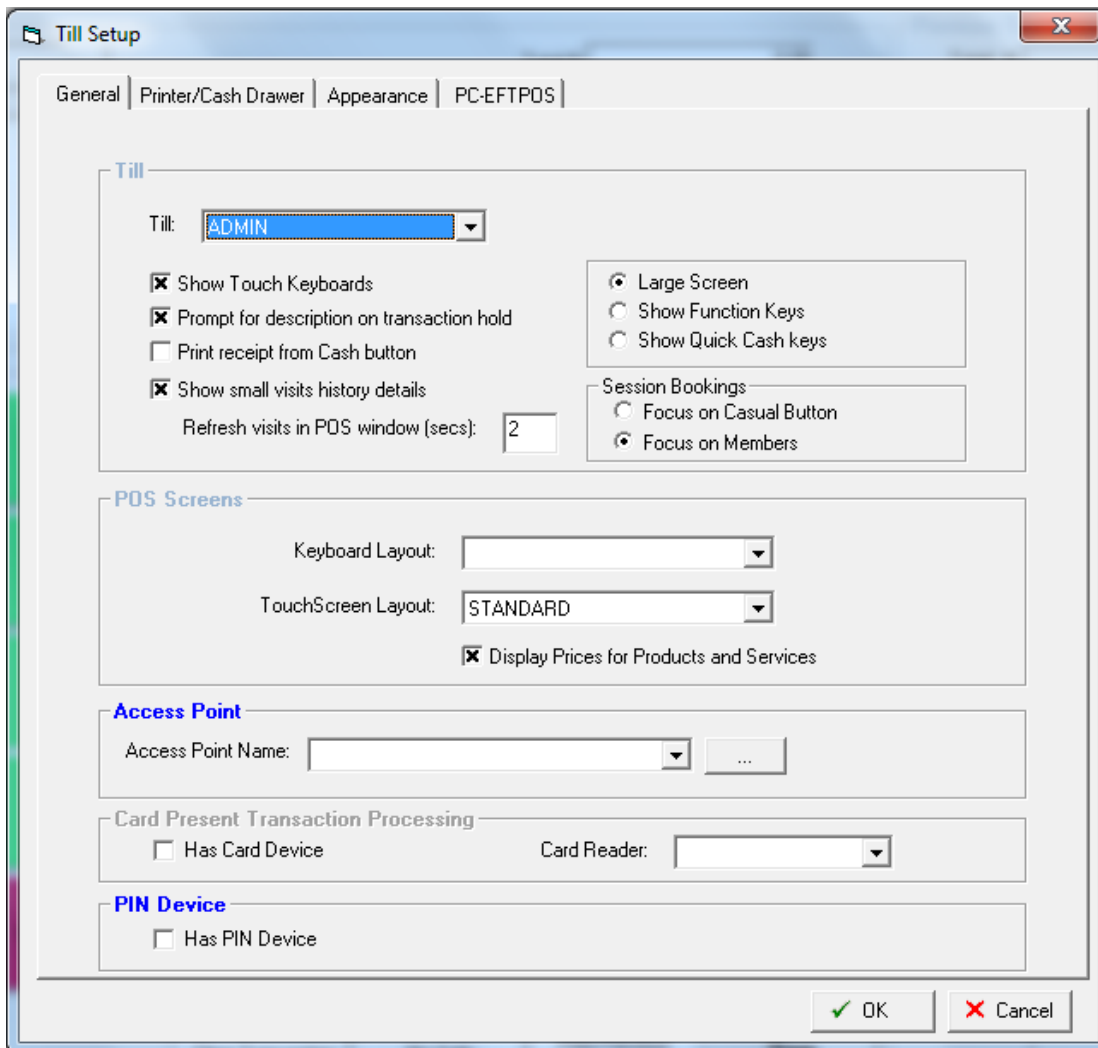
Colour coding of buttons provides a quick reference for identification.



The following pages will systematically describe how to customise a Point Of Sale screen in order to have it work effectively for your business; in addition the various functionalities contained within the Point Of Sale Module for future usage.

## Till Setup

### General Tab



Till Select the required till for this computer from 

Show Touch Keyboards Item no longer used

Prompt for description on transaction hold A transaction may be placed temporarily on hold for future processing; selecting this will result in a prompt to request for a reason why item is to be held.

Print receipt from Cash button Select to allow for receipts to be printed using the cash button.

Show small visits history details	Will display visits made by the customer.
Refresh visits in POS window (secs)	This is how often the visits will refresh.
Large screen	This will display both function and Quick cash buttons.
Show function buttons	This will show the function buttons only.
Show quick cash buttons	This will show the Quick cash buttons only.
Keyboard Layout	This is if you wish to use a keyboard layout Nominate the particular layout you wish to display.
Touch Screen Layout	This is if you wish to use a touch screen layout. A layout ID must be selected in order for this to display. Refer to Touch Screen Layout set up.
Display Prices for Products and Services	Select this box if you wish for the prices for products and services to be displayed on the POS touch screen buttons.
Access Point	Access Points are used to determine where in the centre a person is visiting. Access points are setup in Admin > Site> Other Site Parameters/Setup Locations> Access Points.
Has Card Device	Select this option if you will be using a card device.
Card Reader	If you have a card device select the appropriate device for use.
Has Pin Device	Select this if you have a PIN device.

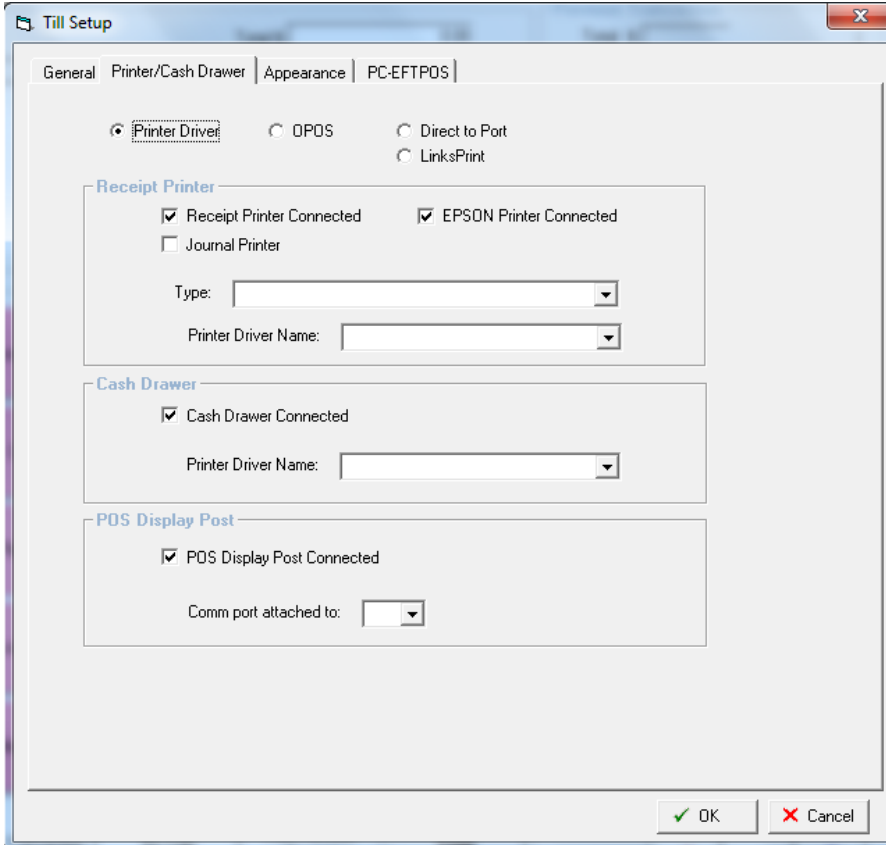
### *Access parameters through POS*

The access parameters that allowed users to restrict particular membership and visit pass types along with class types through particular access points are available through POS. If you require such functionality please contact Links for assistance with setting up this option.

## Till Set up

This is where you set up your POS screen, working through the different tabs to select appropriate settings. Prior to set up you need to have tills and access points created. See Admin> Site> Other Site Parameters/Setup Locations - Tills and Access Points.

### Printer/Cash Drawer Tab



**Till Setup**

General | **Printer/Cash Drawer** | Appearance | PC-EFTPOS

Printer Driver  
  OPOS  
  Direct to Port  
 LinksPrint

**Receipt Printer**

Receipt Printer Connected  
  EPSON Printer Connected  
 Journal Printer

Type:

Printer Driver Name:

**Cash Drawer**

Cash Drawer Connected

Printer Driver Name:

**POS Display Post**

POS Display Post Connected

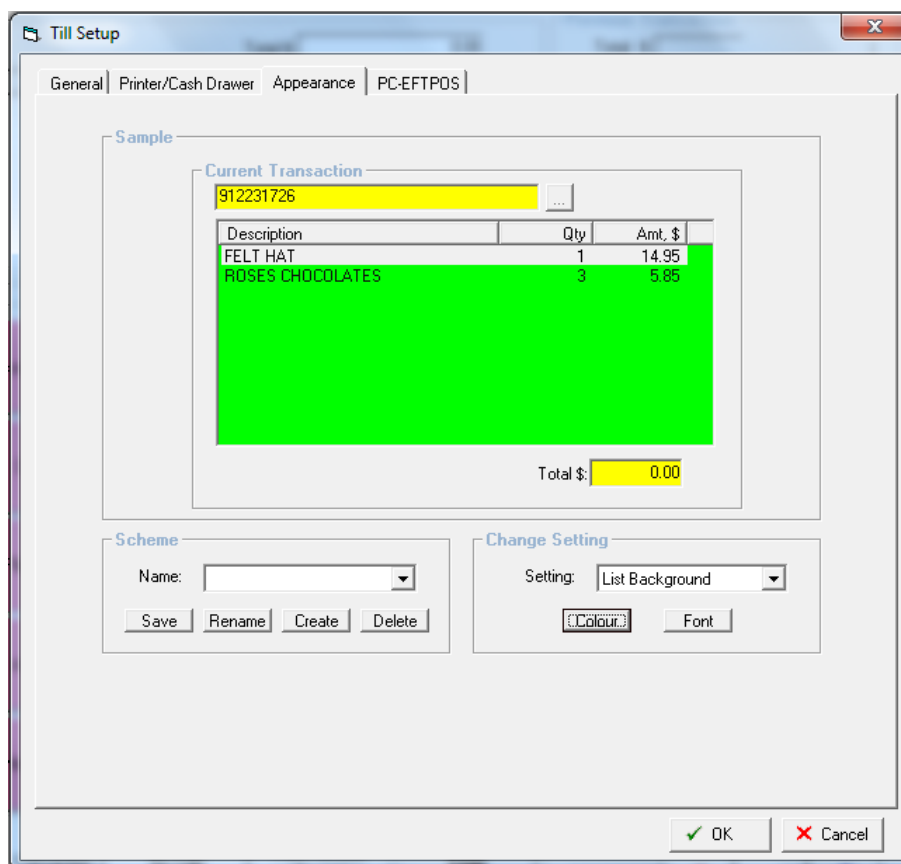
Comm port attached to:

OK Cancel

Printer Driver	Select this if you are using an Epson driver
OPOS	Select this is you have installed OPOS
Direct to Port	This is used for terminal services and serial printers
Links Print	This can be used over terminal services for speed
Receipt Printer Connected	Check if a receipt printer is connected
EPSON Printer Connected	Always check if a receipt printer is connected
Journal Printer	No longer used with Links
Type	Select Omron Thermal



- Printer Driver Name                      Select the driver name if relevant
- Cash Drawer Connected                Check if a cash drawer is connected
- Printer Driver Name                      Select the same driver as the printer
- POS Display Post Connected            Check if you wish to use a display post
- Comm port attached to                  Select which comm port the display post is connected to

## Appearances Tab



The appearance screen allows you to customise the colours and fonts of the display panels in the POS screen.

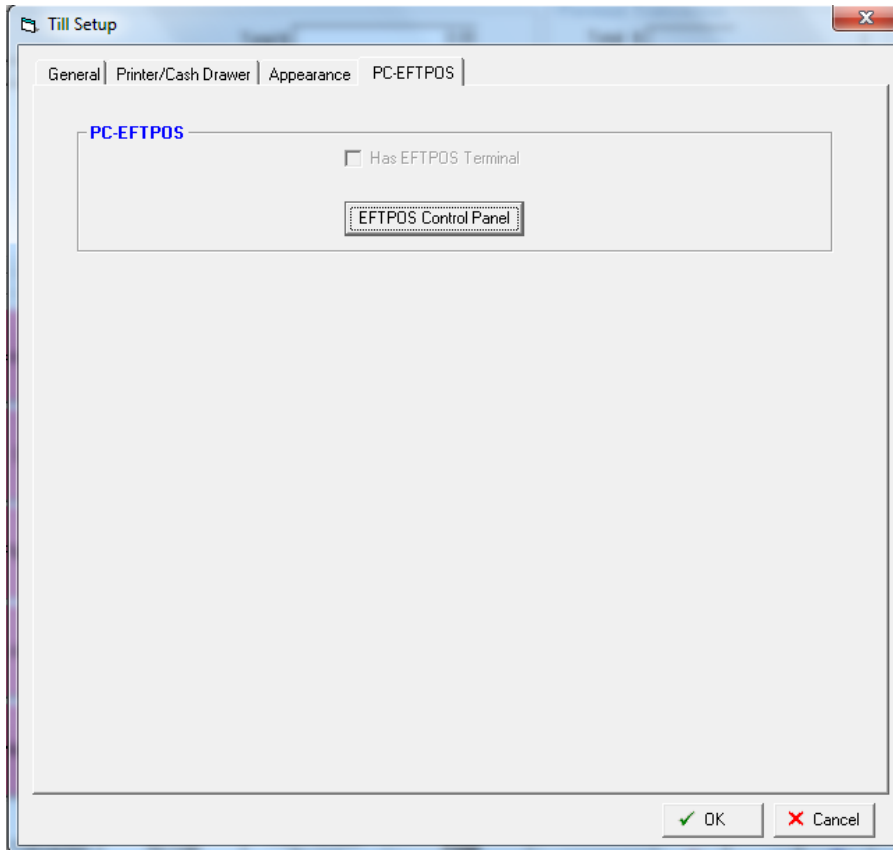
### To Change Appearance

1. Use the drop down box  in the Setting to select which area you would like to change, start with input background.
2. Select  and choose the colour you would like to use.

3. Continue through the other three options.
4. When it comes to the writing you are able to change the Font as well as the colour.
5. Once the desired appearance has been achieved select OK.

### **PC-EFTPOS Tab**

This will be setup by a Links Representative and your Bank/Financial Institution.





## Post Code Validation

There is postcode validation within the database that will allow you to select the postcode/zip code for a suburb/city where there is more than one code. To activate this feature go to Admin> Site Menu> Site Setup.

**Site Details**

Show Customer Emergency / Health Details

Use Guest Passes

Enable Toolbar

Post Code Validation

Address: \_\_\_\_\_

City: ASCOT VALE

State: VI Post Code: 3524

**Point of Sale**

3524 is not a valid Post Code for ASCOT VALE.

OK

Mail

Once this is turned on when you type in a suburb it will type with predictive text. You will then be able to select a range of codes from the database if more than 1 exists for that suburb/city.

**Contact Details [default]**

Address: \_\_\_\_\_

City: ASCOT VALE

State: VI Post Code: \_\_\_\_\_

Predictive typing

Click here to see the suburbs/cities list

**City**

City	Post Code
KENSINGTON	3031
ABBOTSFORD	3067
AIRPORT WEST	3042
ALBION	3020
ALPHINGTON	3078
ALTONA	3018
ALTONA MEADOWS	3028
AMSTERDAM	528746Y
ARDEER	3022
ASCOT VALE	3032
ASCOT VALE	3032
ASCOTVALE	3032
ATTWOOD	3049
AVONDALE HEIGHTS	3034

**Edit**

City: ASCOT VALE

Post Code: 3032

1 people, 1 suppliers, 2 clients have this City and Post Code combination.

Update Cancel

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

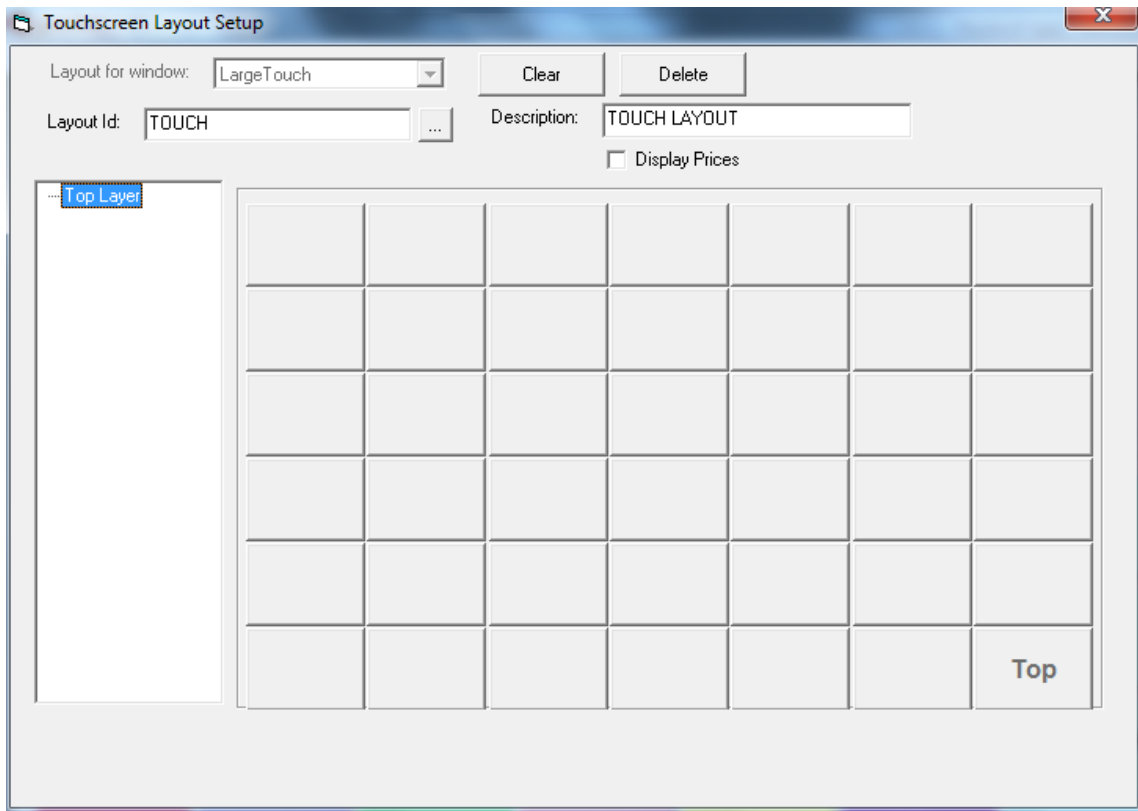
Select Cancel Add New City

## Touch Screen Layout

POS> Till> Touch Screen Layout

The touch screen can be configured to operate in an unlimited series of layers. By selecting a particular button you can move between the layers to which ever function you wish to perform.

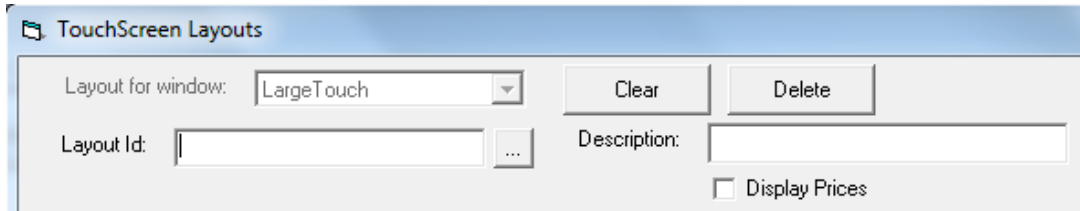
As a result you can actually create a number of screens each with a different emphasis, depending on where they will be utilised. To clarify, a till displaying in a gym would display with an emphasis on membership and transactions relating to the gym where as a till displaying at a reception area may display with an emphasis on all transactions other than membership and student enrolments which may take more time. You can setup a switching button that allows you to easily switch between two or more layouts.



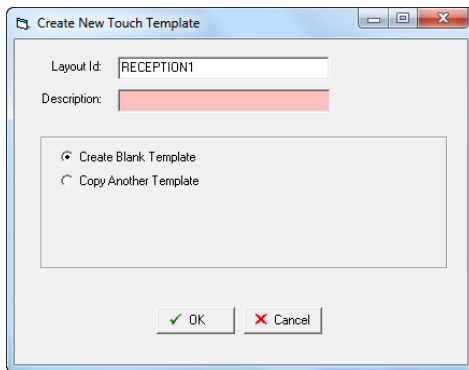
To modify an existing touch screen, use the search button and select the layout you wish to make changes to.

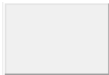
## Creating a New Touch Screen Layout

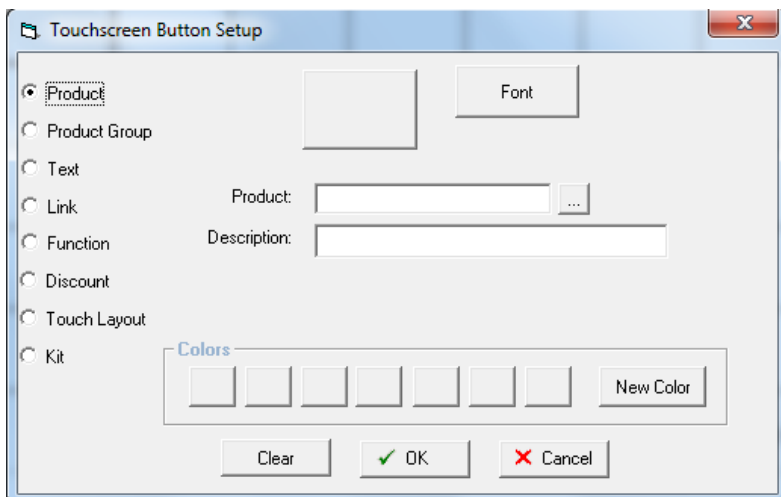
1. Select the Layout for Window: Either large or small Touch.  
This refers to the size of the display; a large or small window and therefore large or small buttons. It is recommended that Large Touch is selected as the button size is more appropriate to work with.



2. Enter the Layout Id, this is the name you wish to call your layout to distinguish between multiple layouts that are designed i.e. Kiosk or Till.



3. Enter the Description for the Layout and select if you wish to create a blank template or if you wish to copy another template and select ok.
4. Select  Display Prices if you wish to have the prices displayed on the POS buttons for Products or Services.
5. Select a blank button  and the following screen will appear.

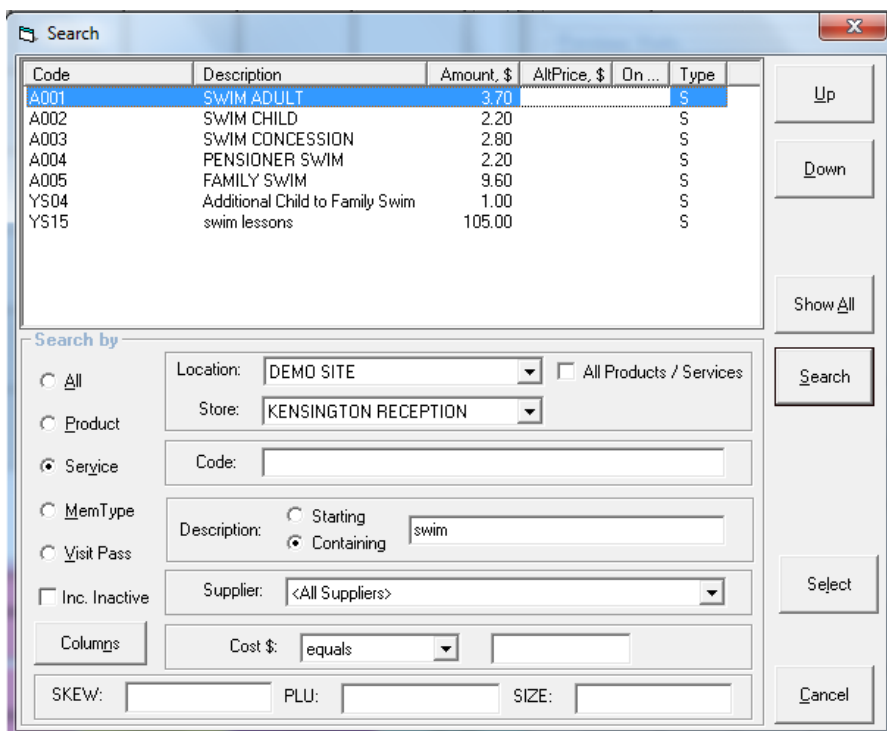


6. Nominate what you wish this button will perform, e.g. is it to sell a product, provide a discount? Or does it represent a link to a further layer of buttons that sell products/services?

### Product

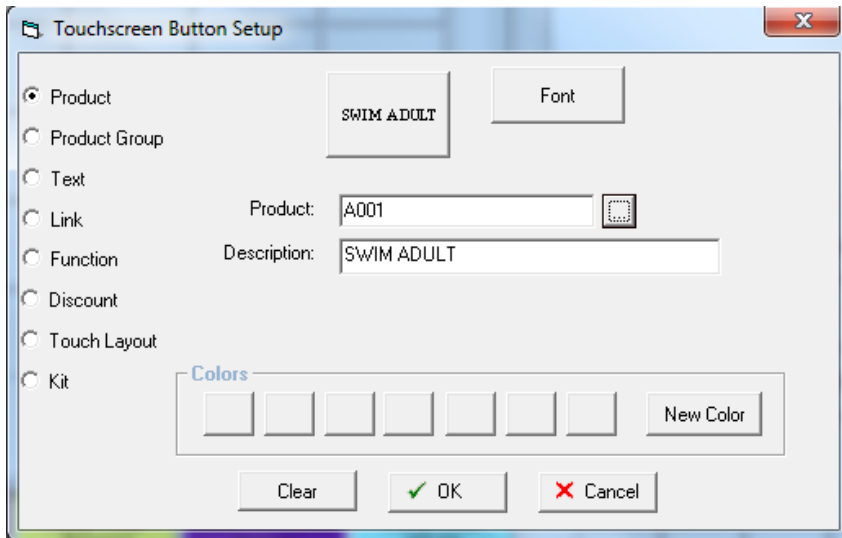
Select Product if you wish this button to sell any Products, Services, Membership or Visit passes

1. Select Product.
2. Select the search button (...) and find the Products, Services, Membership or Visit pass you wish to create a button for.




- Once you have found the right one double click to select or highlight and click on the Select Button.
- You can change the description that displays on the button by over typing what displays in the description field. You can also select a colour for the button, by selecting

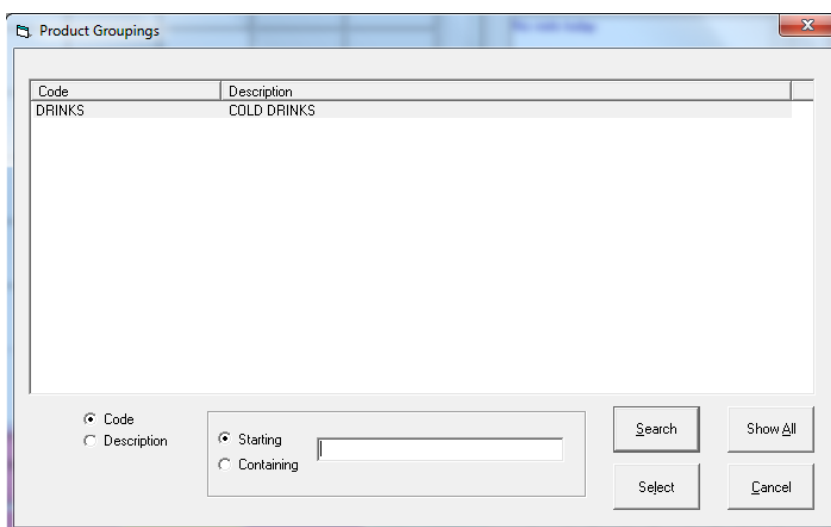
**New Color**



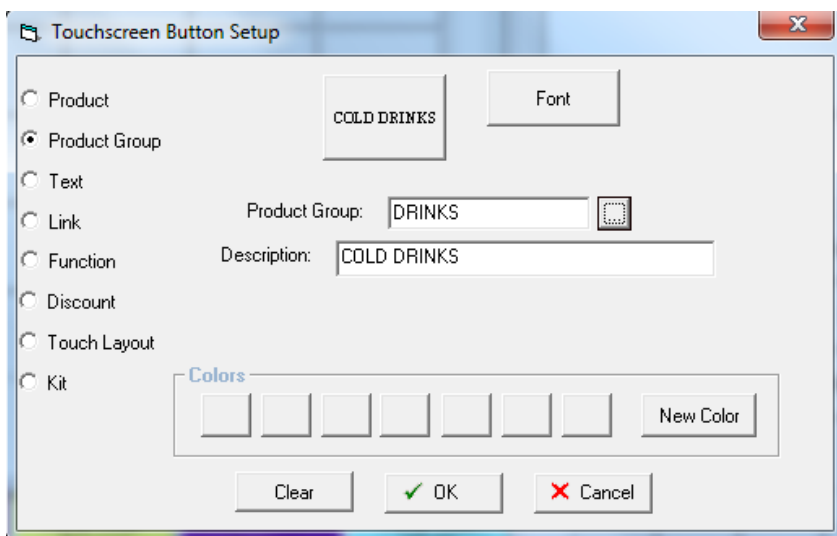
### Product Group

This is where you can enter a product group. An example is Cold Drinks, if all cold drinks were added to the group Cold Drinks when they were set up as products, instead of having to create a link and placing all drinks on the next layer Links automatically creates this for you, these needs to have been set up when adding the products and services. See the Admin Module for further information on Grouping.

- Select Product Group.
- Select the search button  to find the Product group you wish to use.



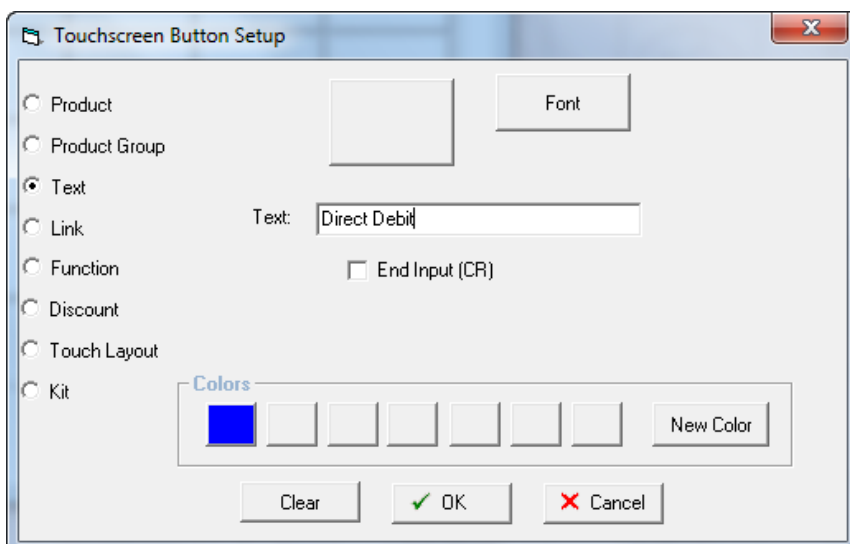
3. Select the Group you wish to add to the button by double clicking on the group or by selecting the group and then clicking on the Select button.



### Text

Text will create a button with no other function than to have text on it, this could be used to have headings for rows or columns. I.e. for memberships having a button that says direct debit then having all relative memberships under that on the same touch layout.

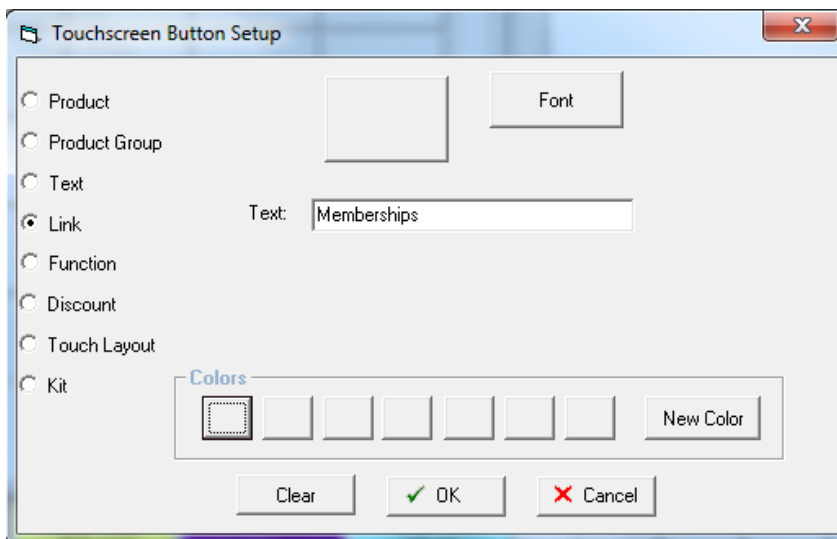
1. Select Text.
2. Enter the text you wish to have on the screen.
3. Tick End Input (CR) if you wish for you text to be able to bring up the customer screen.



## Link

Creating a Link means that you are creating a Link to another full layer in POS. i.e. you wish to make a link to another layer to see all memberships available. It is possible to create an unlimited amount of Links however be mindful that too many layers can lead to difficulty of locating products/services during busy times.

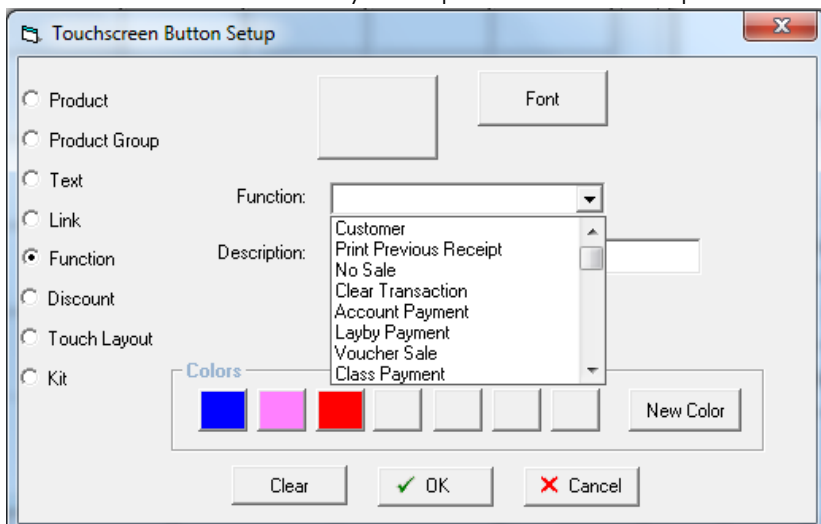
1. Select Link.
2. Enter what you want the Link button to say, note this should relate to the group of buttons in the next layer.



## Function

A Function button is a button that performs different functions from No sale, Class Payment to Print Previous Receipt. It's recommended to create function buttons that are performed frequently on the top layer of POS.

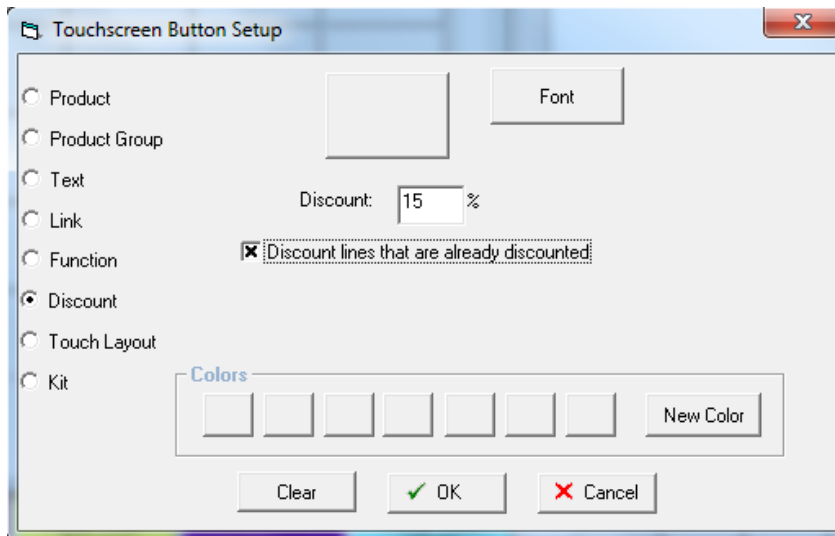
1. Select Function.
2. Select the function you required from the Drop Down box 



## Discount

A discount button allows you to set a button for a set rate of discount; an example would be if you want to set a button to be used to give staff a discount.

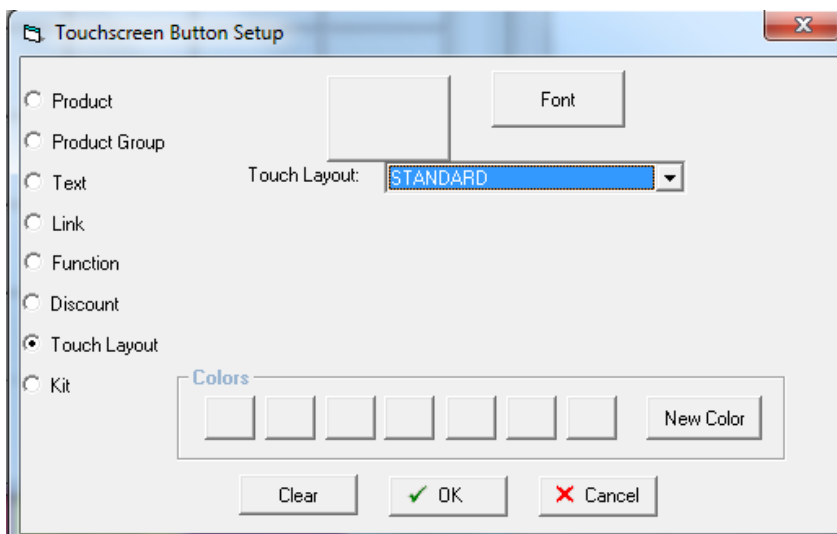
1. Select Discount.
2. Enter the discount rate (this is in percentage).
3. Select  Discount lines that are already discounted if you wish for a product that already has a discount to receive this discount amount on top of the amount already discounted.



## Touch Layout

This allows you to easily switch between multiple touch layouts that have been designed. After you have setup at least two layouts select a button on each layout that you wish to be your 'switching' button.


1. Select touch layout.
2. Select the Touch Layout you wish the button to take you to.

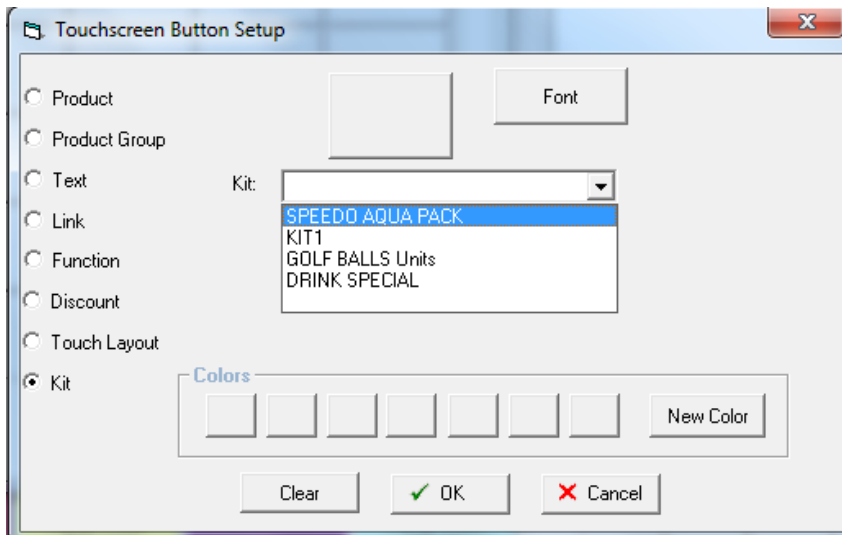




## Kit

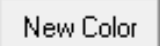
This allows you to add a kit to the POS, A kit allows you to sell a few products under one name e.g. Speedo pack, which includes a pair of men's Speedos, goggles and cap. This needs to have been set up first, this is set up in Admin> POS> Kits


1. Select Kit.
2. Select the type of Kit from the drop down box 

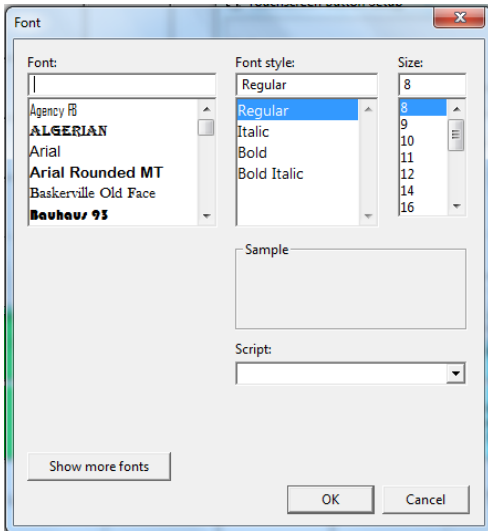


7. Now you can change the

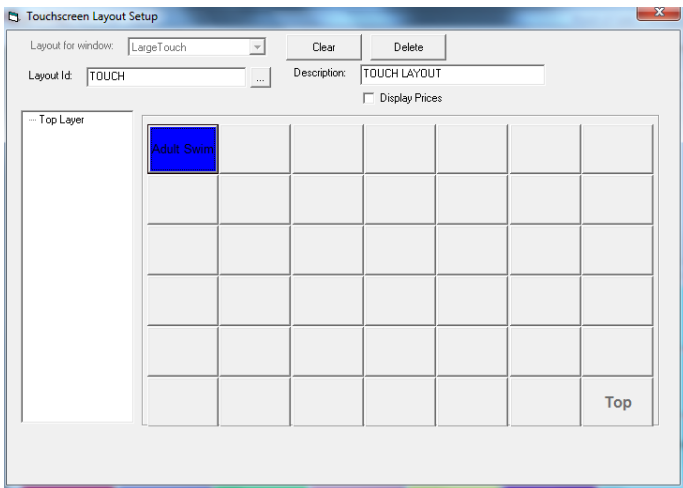
**Description:**  of what will be written on the button this should be something everyone will recognise.

8. Choose a Colour . Select a colour that you wish the button to be displayed as. When selecting a colour it may be a good idea to have that colour run as a theme throughout the area that the button represents, e.g. blue for all aquatic POS transactions. This makes it easier for staff to quickly identify particular buttons at a busy POS terminal.

9. Choose a Font . Select the font you like i.e. Font, size and style.



10. Once Happy with your choices select OK and the button will be set.

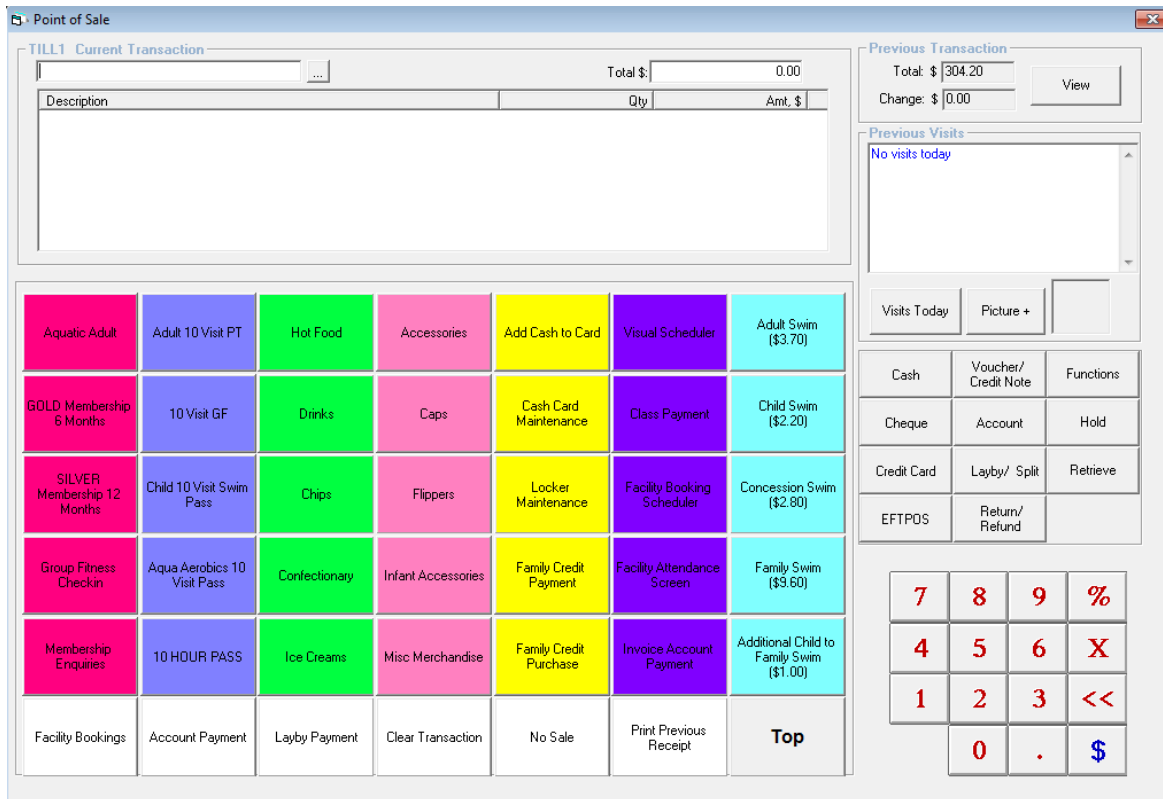


11. Continue creating buttons and layers until you are happy with the layout and what is on it.

## POS Options

### Opening the Till/Touch Screen

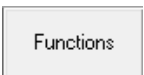
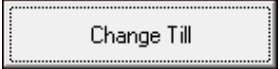
If the Point Of Sale screen is not already open, go to POS> Till> Point of Sale.

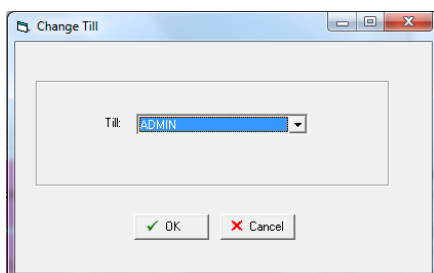


### Changing the Till ID on the fly

You can change the Till ID on the fly. This will be helpful for those sites that collect transaction for separate locations for example.

You must first active the ability to change the till ID in Pos Setup Admin > POS > Setup.

1. Click on the  on POS.
2. Select the  button and the below screen will appear.



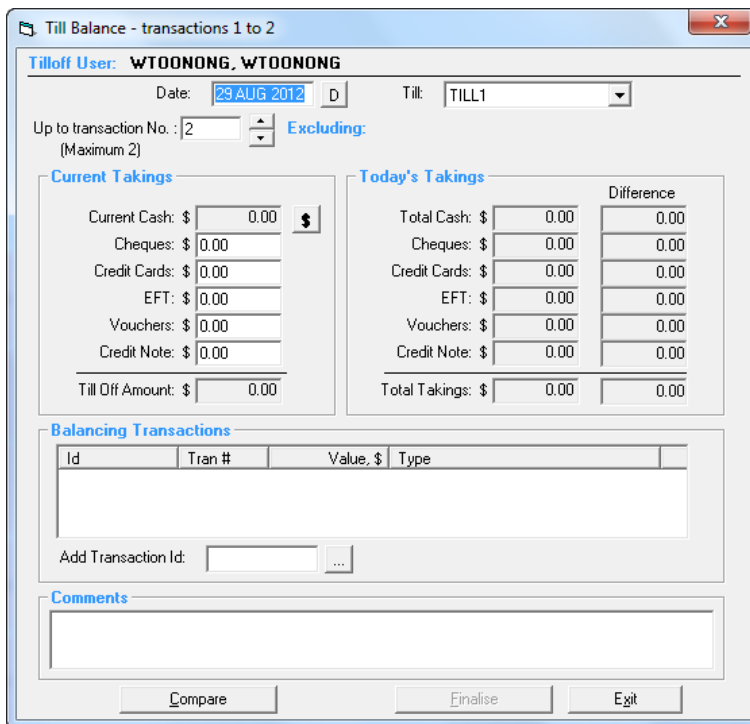
3. Select the new Till and click OK.

## Secure Till Offs

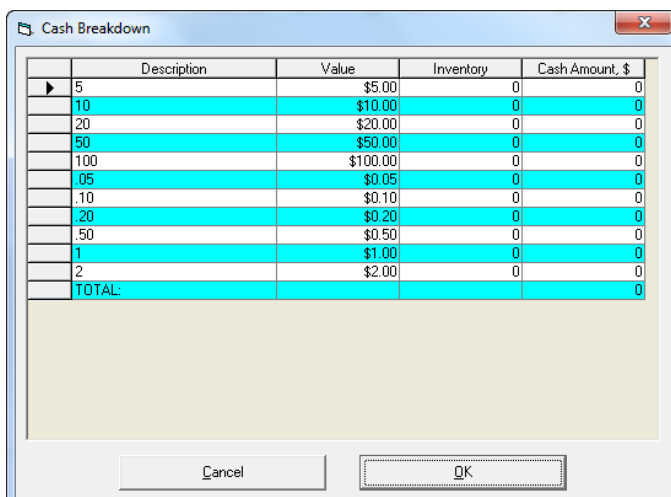
POS> Functions> Till Off

For a secure till off you tell links what you have taken, then links will tell you what you should have taken. To perform a secure till off

1. In POS click on Functions> Till Off and put in your Links username and password to proceed.
2. Check the date and till are correct.

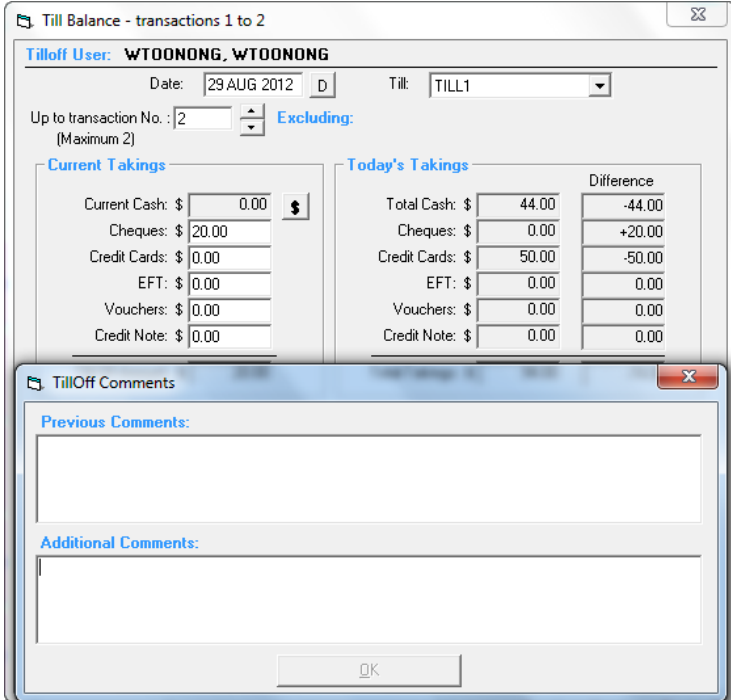


3. Count up all moneys, Credit Card Receipts, EFTPOS Receipts, cheques, vouchers and credit notes and then separate your float amount from the cash takings.
4. Click on the '\$' button to enter your current cash (i.e. the amount of total cash minus your float amount) into the correct denominations. Example: If you have one \$20 note put a '1' under the inventory column in the 'Twenty Dollar' row and so forth.



	Description	Value	Inventory	Cash Amount, \$
5		\$5.00	0	0
10		\$10.00	0	0
20		\$20.00	0	0
50		\$50.00	0	0
100		\$100.00	0	0
.05		\$0.05	0	0
.10		\$0.10	0	0
.20		\$0.20	0	0
.50		\$0.50	0	0
1		\$1.00	0	0
2		\$2.00	0	0
	TOTAL:			0

5. Once all denominations are entered click on 'Ok'.
6. Enter in the total amounts taken for the day for Cheques, Credit Cards, EFTPOS, Vouchers and Credit Notes. (NOTE: In Links you need to separate the Credit Card and EFTPOS takings).
7. Enter in a comment under 'Comments'.
8. Click on 'Compare'. This will bring up the amount of total takings processed through Links in 'Today's Takings' and will display any discrepancies under the 'Difference' column.



**Till Balance - transactions 1 to 2**

TillOff User: **WTOONONG, WTOONONG**

Date: 29 AUG 2012 D Till: TILL1

Up to transaction No.: 2 (Maximum 2) Excluding:

Current Takings		Today's Takings			
Current Cash: \$	0.00	Total Cash: \$	44.00	Difference	-44.00
Cheques: \$	20.00	Cheques: \$	0.00		+20.00
Credit Cards: \$	0.00	Credit Cards: \$	50.00		-50.00
EFT: \$	0.00	EFT: \$	0.00		0.00
Vouchers: \$	0.00	Vouchers: \$	0.00		0.00
Credit Note: \$	0.00	Credit Note: \$	0.00		0.00

**TillOff Comments**

Previous Comments:

Additional Comments:

OK

9. Enter your comment and click on 'Ok'. Click on 'Finalise' and then click on 'Print Till Summary'. Your till off is now complete.

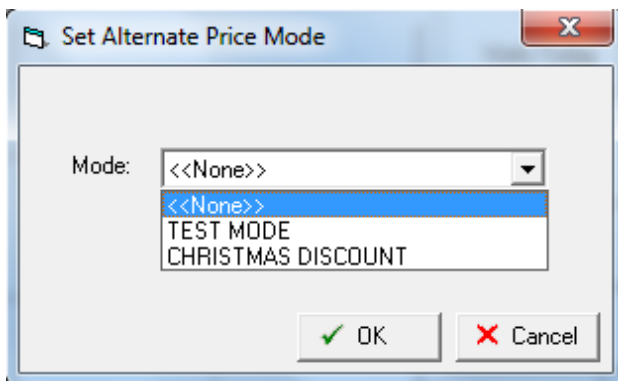
## Setting Alternate Price

POS> Till> Set Alternate Price Mode

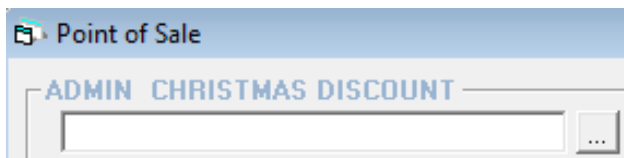
This screen allows you to apply discounts for products, services or memberships at different times of the day, week, month or during a particular period.

E.g. - You have decided that a discount of 25% will apply to all swim wear sold on a particular day.

The alternate price mode will have already had to been set up in Admin> POS> Alternate Price Modes.



1. Go to POS> Till> Set Alternate Price Mode.
2. Select the relevant mode (we are going to select the Christmas discount which is 25%)
3. Select OK.
4. When you look at the top corner of the POS touch screen you will notice that once you select the alternate price mode it will appear next to the Till you are using.



5. To change back go to POS> Till> Set Alternate Price Mode.
6. Select None.
7. Select OK.

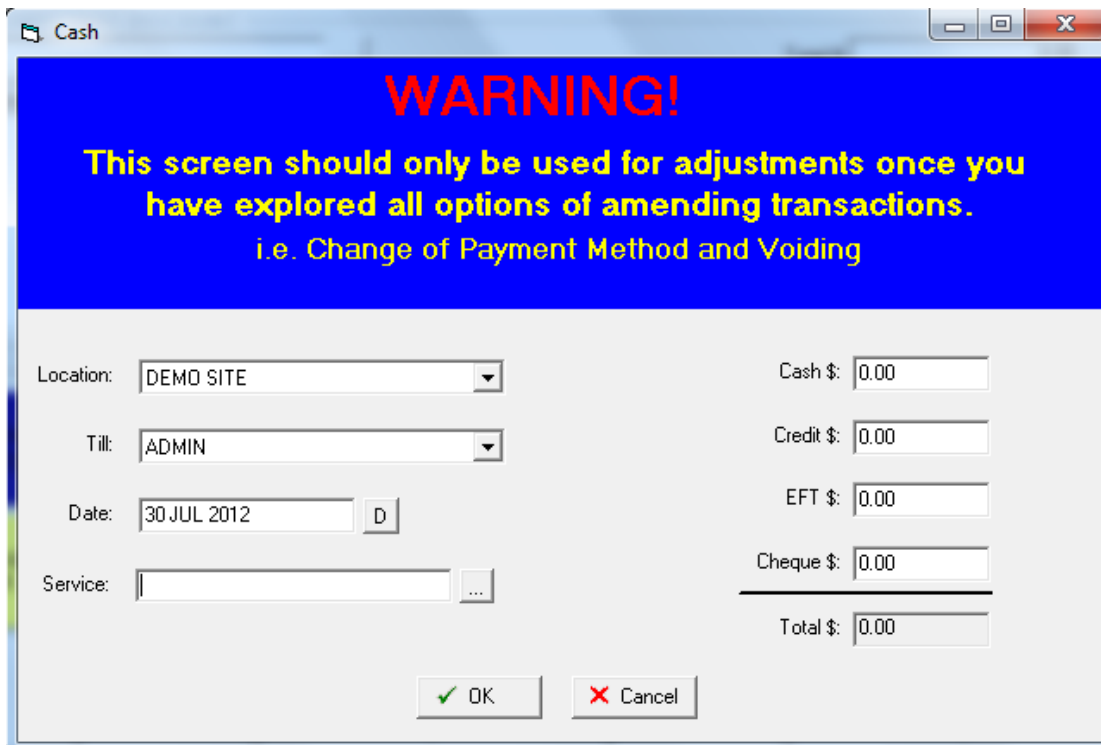
## Retrospective Adjustment

POS> Till> Retrospective Adjustment

Some End users may wish to make adjustments to previous day transactions for accounting purposes. This option should only be used after investigating all other means of reconciliation including make a change to the payment method of a transaction or voiding an incorrect payment.

Making a retrospective adjustment will make an additional transaction to the day selected. If you need to make a positive and negative charge this will need to be done in two separate retrospective adjustments. Note: Transactions for each payment type can be done individually or as a whole.

Access to this screen can be restricted through the Security Group Options. See the Admin module for further information.



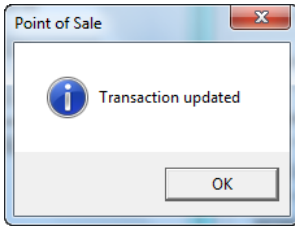
**Cash**

**WARNING!**  
**This screen should only be used for adjustments once you have explored all options of amending transactions.**  
 i.e. Change of Payment Method and Voiding

Location:	DEMO SITE	Cash \$:	0.00
Till:	ADMIN	Credit \$:	0.00
Date:	30 JUL 2012 [D]	EFT \$:	0.00
Service:	[...]	Cheque \$:	0.00
		<b>Total \$:</b>	<b>0.00</b>

OK Cancel

1. If you have a multi location database, from the drop box, select the location you wish to apply the adjustment.
2. Select the Till you wish to make the transaction against.
3. Enter the date of the adjustment.
4. Select the service code you wish for money to be added to or taken from.
5. Enter the Cash, Credit, Eftpos and/or Cheque amounts that you wish to change.
6. Select Ok to finalise.



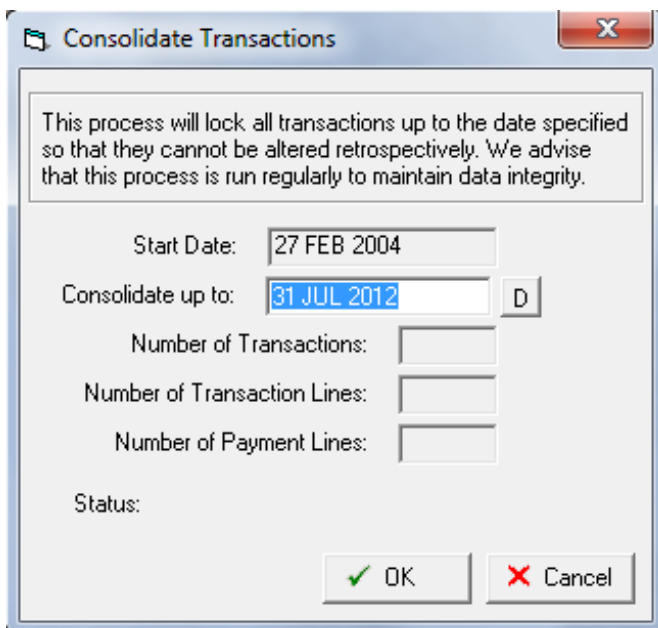
7. Select ok
8. Continue with any other Retrospective Adjustments.

### Consolidation

POS> Till> Consolidation

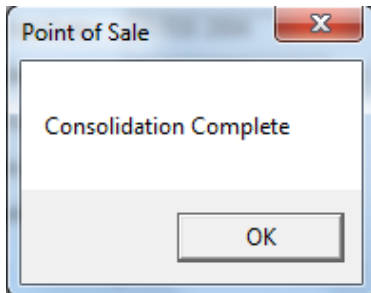
Consolidation is Links way of archiving transactions. This also aids in protection from any corruption that may occur in the event of a computer breakdown that could cause loss of data.

Once consolidation of transactions for a specified date range occurs then those transactions cannot be altered in any way.



1. Select the date you wish to consolidate up to.
2. Select ok.
3. Links will start to consolidate for you. This could be a long process depending on when you last consolidated and should be performed at a non busy time.
4. Once completed links will inform you, select OK.

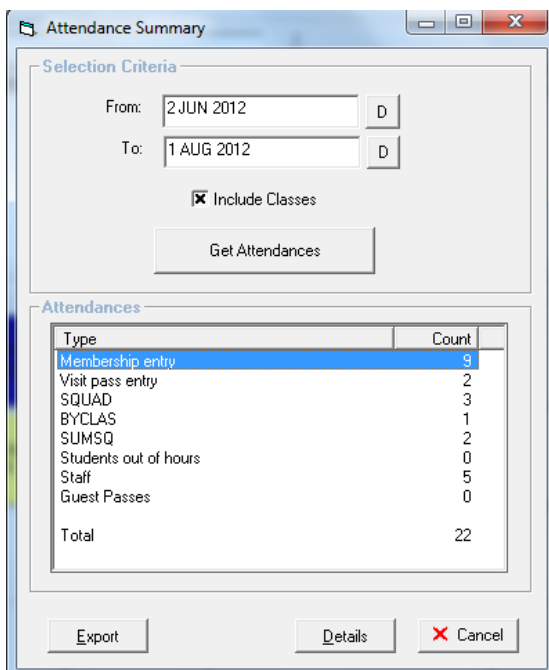


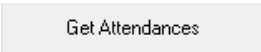


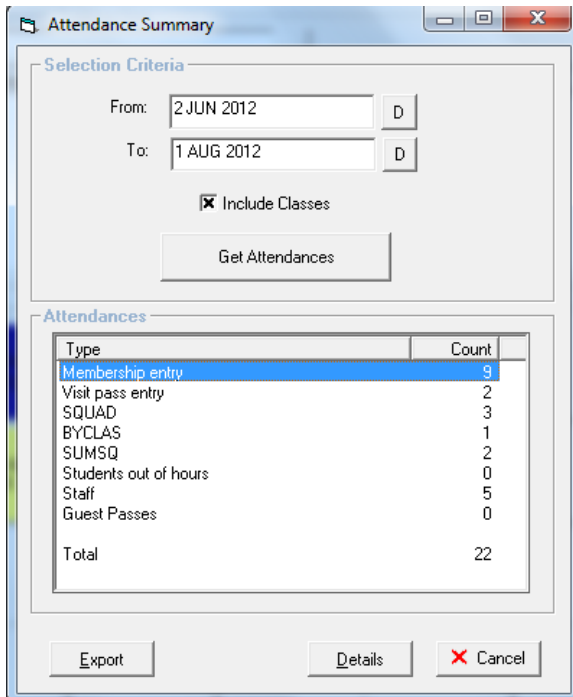
## Attendance Summary

POS> Till> Attendance Summary

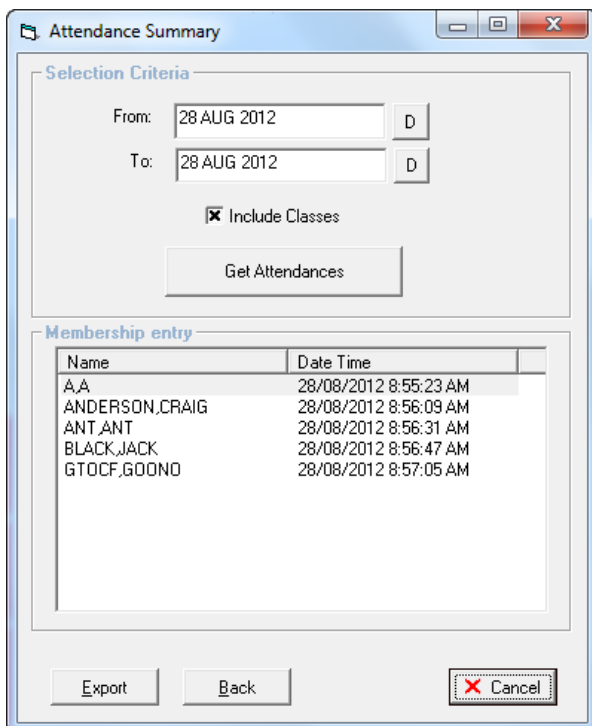
This screen allows you to choose a date range to view and export attendances.

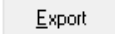
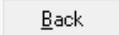


1. Enter the From date and To date to Specify the date range that you wish to have the details of attendances displayed.
2. Select include classes if you wish to have classes attendances included.
3. Select  and the attendance summary will be displayed.



4. To export this summary select 
5. To view more details on the attendances for each type, highlight a Type and select 

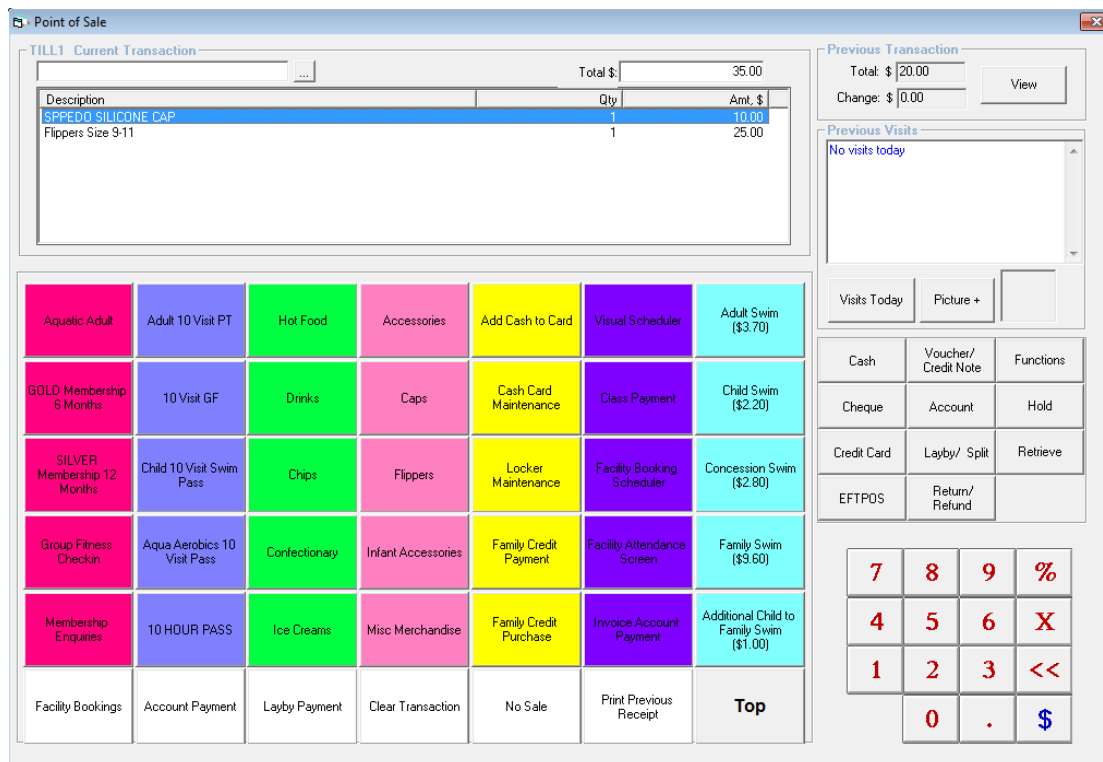


6. To Export the more detailed view of Attendances select 
7. To go back to the summary page select 

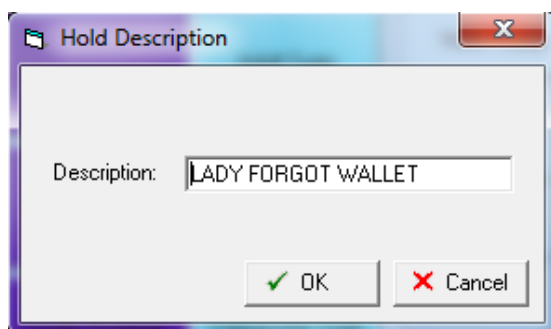
## Holding and Retrieving Transactions

### Holding a Transaction

There may be instances when a customer is unable to purchase a particular product/service when first presenting at point of sale yet still wishes to purchase the product/service at a later stage that day. The product can be put on hold and retrieved later for completion of transaction.



1. In order to place a transaction on hold it must first be on the transaction line.
2. Select Hold and the following screen will display.



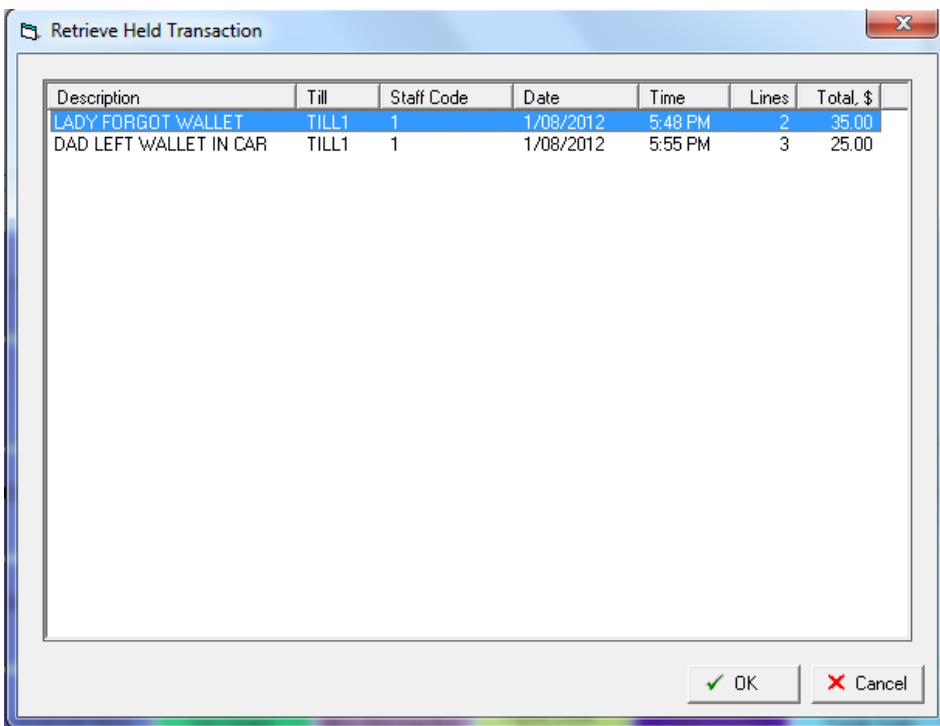
3. Enter a valid reason as to why you wish to place the transaction on hold and select OK.
4. The Point of Sale screen will now clear in readiness for another transaction to be processed.

### Retrieving a Held Transaction

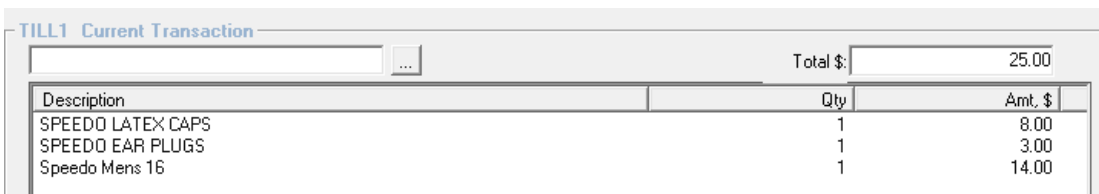
1. Select the Retrieve button.

Cash	Voucher/ Credit Note	Functions
Cheque	Account	Hold
Credit Card	Layby/ Split	Retrieve
EFTPOS	Return/ Refund	

2. If more than one item is currently on hold a list of on hold transactions will appear as below, otherwise the held transaction will appear on the transaction line automatically.



3. Select the transaction that is to be processed by double clicking on it or by selecting it and selecting OK.
4. The transaction will now display in Point of Sale ready to be processed as normal.

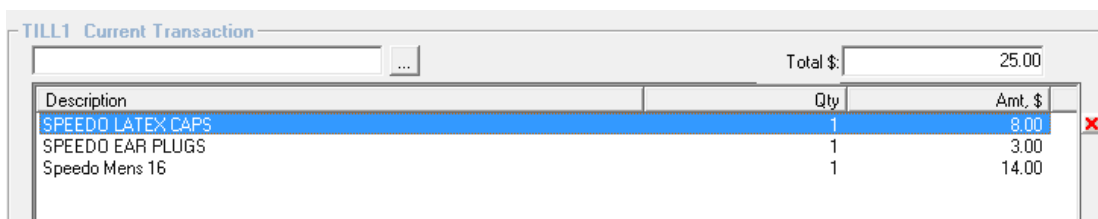


Note: if you wish the transaction to be recorded against a customer then the customer must be selected also. See Assigning a Sale to a Customer.

### Deleting a Held Transaction

If a customer fails to appear to complete the purchase or no longer wishes to purchase the product/service, you need to delete the item without registering any payment.

1. Retrieve the transaction as above.



2. Highlight the transaction to be deleted and click on the  or select the clear

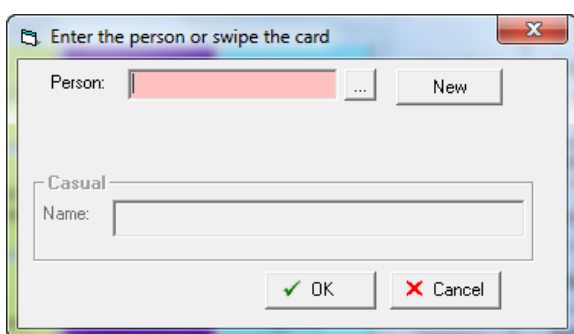


Transaction button if this has been set up on your touch screen layout.

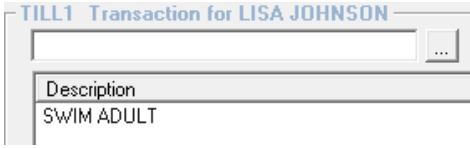
### Assigning a Sale to a Customer

Adding a Customer to a sale would be used if you need to have that particular customers name against the transaction.

1. Select what you wish to sell so it is in the transaction line.
2. If you have created a function button of customer select this otherwise select the Function button and select Customer.



3. Find the customer you are looking for by entering the customer's surname, customer number or scan their card or create a new customer if they are not in your database.
4. Select Ok.
5. You will now notice that the customer you have selected name is now next to the till number.

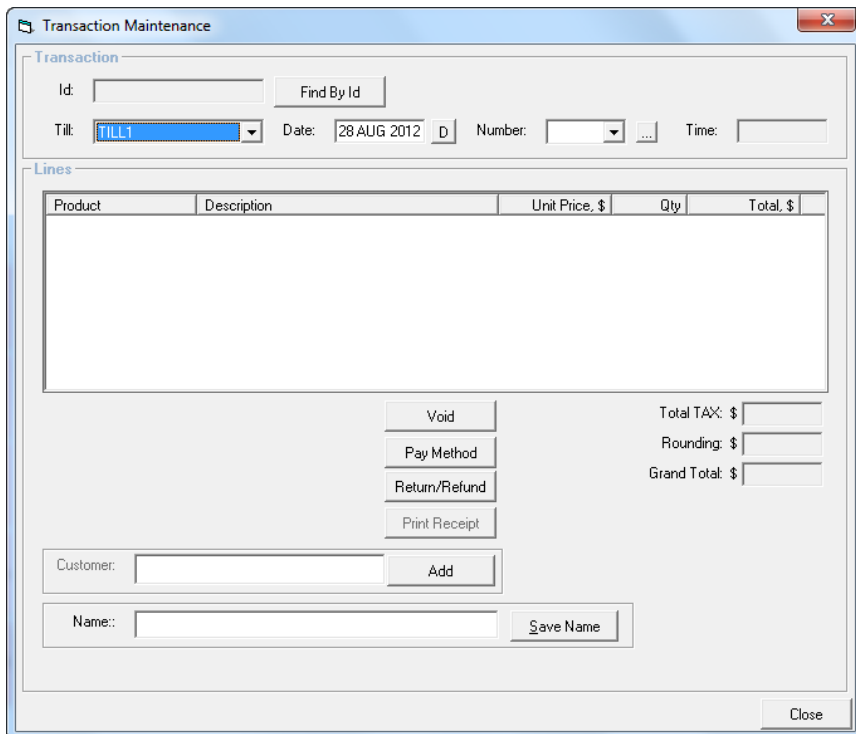


6. Process the transaction as normal.

## Transaction Maintenance

POS> Maintain> Transactions or from Previous Transaction on your Touch Screen select 'View'

This is where you can view previous transactions that you wish to print a receipt for, make an adjustment or void/refund.



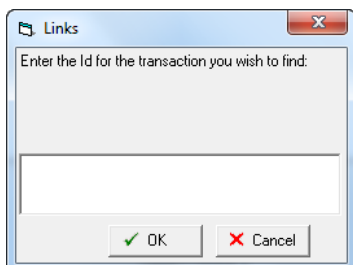
### Finding a Previous Transaction

There are multiple ways to search for a previous transaction.

#### Using the Links Transaction ID

1. You can search for a transaction by the Id number by selecting

**Find By Id**



2. Enter the transaction number and select Ok.

#### Search via Till and Date Filter

1. Enter a till and date for the transaction you are looking for.
2. Select the transaction number from the drop down box or by performing a search by selecting **...**

Transactions

Number	Date/Time	Description	Amount	Payment Type	Void
19	28 Aug 2012 3:16 PM	COKE POWERADE ORANGE	2.50	Cash	
18	28 Aug 2012 3:16 PM	SMITHS CHICKEN	8.50	Cash	
17	28 Aug 2012 3:15 PM	SWIM CHILD	26.70	EFT	
16	28 Aug 2012 3:15 PM	SWIM CHILD	23.40	Credit	
15	28 Aug 2012 3:15 PM	FAMILY SWIM	9.60	Credit	
14	28 Aug 2012 3:15 PM	SWIM ADULT	18.50	Cash	
13	28 Aug 2012 3:15 PM	SWIM CHILD	4.40	Cash	
12	28 Aug 2012 3:15 PM	Additional Child to Family Swim	19.30	Cash	
11	28 Aug 2012 3:15 PM	SMITHS CHICKEN	3.40	Credit	
10	28 Aug 2012 3:14 PM	Sausage	9.00	Cash	
9	28 Aug 2012 3:14 PM	BADMINTON 10 HOUR PASS DISCO...	115.00	Cash	
8	28 Aug 2012 3:14 PM	GOLD 12 MONTH	304.20	Credit	
7	28 Aug 2012 3:13 PM	NOSE PLUGS	23.00	EFT	
6	28 Aug 2012 3:13 PM	Aqua Aerobics 10 Visit Pass	65.00	Credit	
5	28 Aug 2012 3:13 PM	MVPADULT10 PASS	35.15	Cheque	
4	28 Aug 2012 3:12 PM	BAG OF LOLLIES	50.05	Cash	
3	28 Aug 2012 3:12 PM	GRINDERS COFFEE CAPPUCINO	6.20	Credit	
2	28 Aug 2012 3:12 PM	SMITHS CHEESE AND ONION	1.70	Cash	

Number  
 Date/Time  
 Description  
 Amount  
 Payment Type

Starting   
 Containing

Search Show All  
 Select Cancel

3. Select the transaction you want or.
4. Select one of the following options to define your search.
  - a. Number.
  - b. Date/time.
  - c. Description.
  - d. Amount.
  - e. Payment type
5. Enter a description of what you want to search for and press the enter key any transaction with your description will appear. I.e. select payment type write credit and press the enter key and all transactions paid via credit will appear.

Transactions

Number	Date/Time	Description	Amount	Payment Type	Void
16	28 Aug 2012 3:15 PM	SWIMCHILD	23.40	Credit	
15	28 Aug 2012 3:15 PM	FAMILY SWIM	9.60	Credit	
11	28 Aug 2012 3:15 PM	SMITHS CHICKEN	3.40	Credit	
8	28 Aug 2012 3:14 PM	GOLD 12 MONTH	304.20	Credit	
6	28 Aug 2012 3:13 PM	Aqua Aerobics 10 Visit Pass	65.00	Credit	
3	28 Aug 2012 3:12 PM	GRINDERS COFFEE CAPPUCINO	6.20	Credit	

Number  
 Date/Time  
 Description  
 Amount  
 Payment Type

Starting   
 Containing

Search Show All  
 Select Cancel

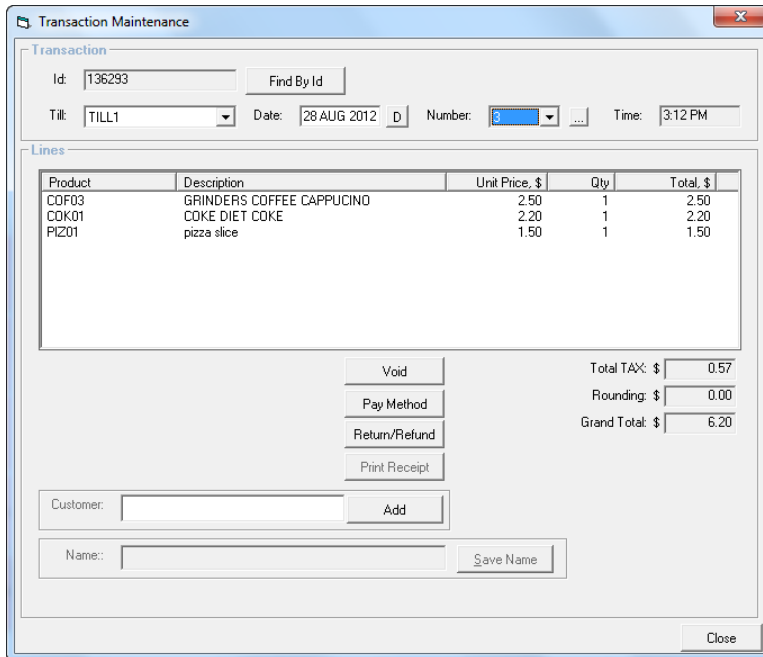
6. Double click on a transaction to select it



## Voiding a Transaction

You have the ability to void a transaction. Links Modular Solutions only recommends that a void is used if the transaction was made on the same day.

1. Find the transaction you wish to make changes to, use finding a previous transaction.



Transaction Maintenance

Transaction

Id: 136293 Find By Id

Till: TILL1 Date: 28 AUG 2012 D Number: 3 Time: 3:12 PM

Product	Description	Unit Price, \$	Qty	Total, \$
COF03	GRINDERS COFFEE CAPPUCINO	2.50	1	2.50
COK01	COKE DIET COKE	2.20	1	2.20
PIZ01	pizza slice	1.50	1	1.50

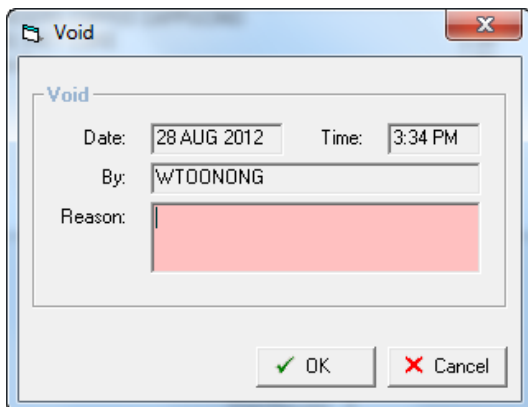
Buttons: Void, Pay Method, Return/Refund, Print Receipt

Total TAX: \$ 0.57  
 Rounding: \$ 0.00  
 Grand Total: \$ 6.20

Customer: Add  
 Name: Save Name

Close

2. Select Void.



Void

Void

Date: 28 AUG 2012 Time: 3:34 PM

By: WTOONONG

Reason:

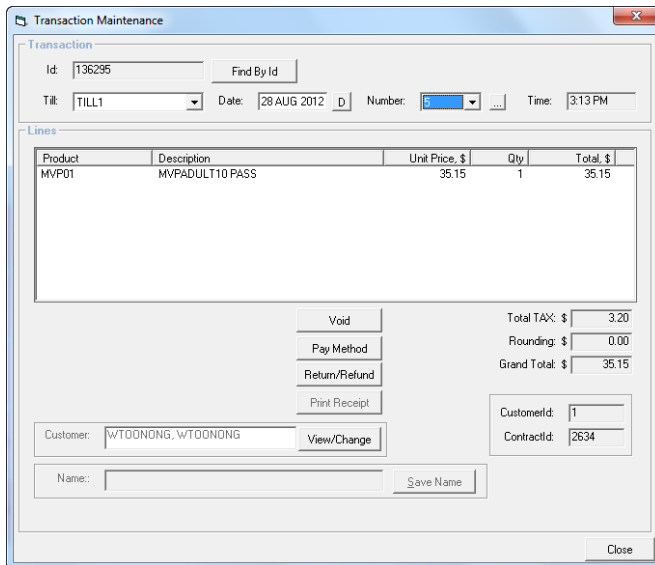
Buttons: OK, Cancel

3. Enter a valid reason for why the void is been performed.
4. Select ok and the transaction has now been voided.

## Changing a Payment Type

This would be used to change a payment type if a sale was put through the wrong payment tender, as this will affect the till at the end of the day.

1. Find the transaction you wish to change the payment type use finding a previous transaction.

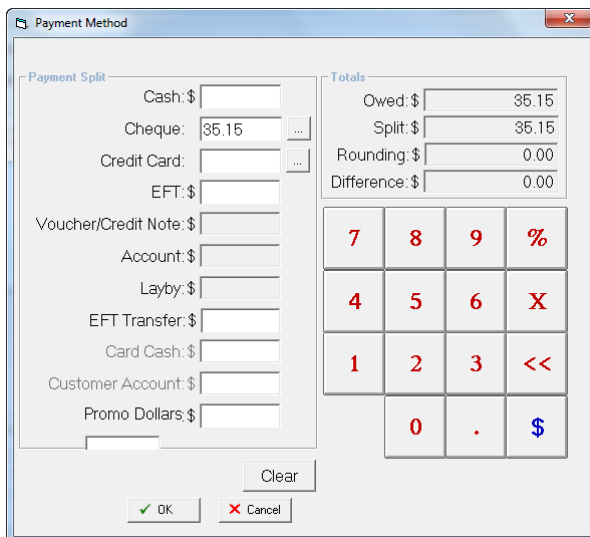


The Transaction Maintenance window shows details for transaction ID 136295. The Till is TILL1, Date is 28 AUG 2012, and Time is 3:13 PM. The transaction lines table is as follows:

Product	Description	Unit Price, \$	Qty	Total, \$
MVP01	MVPADULT10 PASS	35.15	1	35.15

Summary statistics: Total TAX: \$ 3.20, Rounding: \$ 0.00, Grand Total: \$ 35.15. Customer: WTOONONG, WTOONONG. Contract ID: 2634.

2. Select Pay method.



The Payment Method window shows the 'Payment Split' section with the following values:

- Cash: \$
- Cheque: 35.15
- Credit Card: \$
- EFT: \$
- Voucher/Credit Note: \$
- Account: \$
- Layby: \$
- EFT Transfer: \$
- Card Cash: \$
- Customer Account: \$
- Promo Dollars: \$

The 'Totals' section shows:

- Owed: \$ 35.15
- Split: \$ 35.15
- Rounding: \$ 0.00
- Difference: \$ 0.00

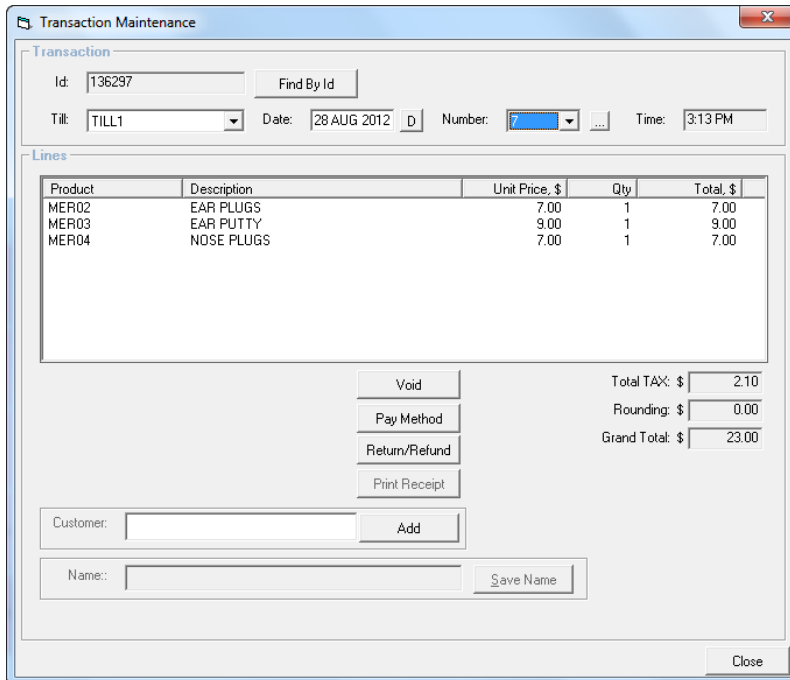
A numeric keypad is visible with buttons for digits 0-9, %, X, <<, and \$.

3. Remove the payment amount from the original payment box, then click in the box you wish to change the payment type to and the amount will appear.
4. Then select ok and the payment type has been changed.

## Return/Refund

This is used if the transaction was not performed on the same day or if it is a product that is faulty is been returned.

1. Find the transaction you wish to return/refund by using finding a previous transaction.



Transaction Maintenance

Transaction

Id: 136297 Find By Id

Till: TILL1 Date: 28 AUG 2012 D Number: 7 Time: 3:13 PM

Lines

Product	Description	Unit Price, \$	Qty	Total, \$
MER02	EAR PLUGS	7.00	1	7.00
MER03	EAR PUTTY	9.00	1	9.00
MER04	NOSE PLUGS	7.00	1	7.00

Void Total TAX: \$ 2.10

Pay Method Rounding: \$ 0.00

Return/Refund Grand Total: \$ 23.00

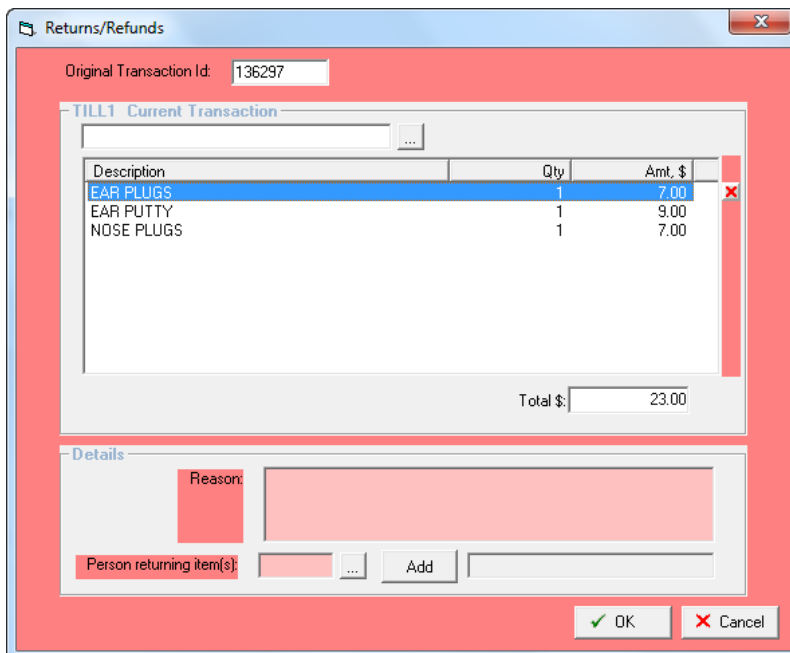
Print Receipt

Customer: Add

Name: Save Name

Close

2. Select Return/Refund.



Returns/Refunds

Original Transaction Id: 136297

TILL1 Current Transaction

Description	Qty	Amt, \$
EAR PLUGS	1	7.00
EAR PUTTY	1	9.00
NOSE PLUGS	1	7.00


Total \$: 23.00

Details

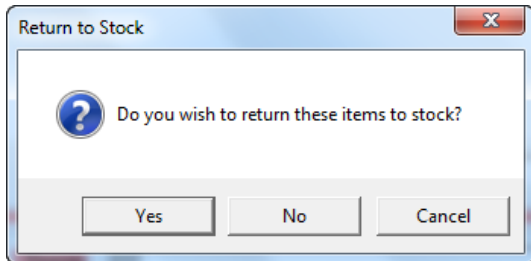
Reason:

Person returning item(s): Add

OK Cancel

3. Highlight and remove any items that are not been returned by selecting the .
4. Enter a valid reason for the refund.

5. If selected add a customer to the return by searching for a current customer or selecting add.
6. Then select ok. If you are returning a Product, you will be asked if you wish for the items to be returned to stock.



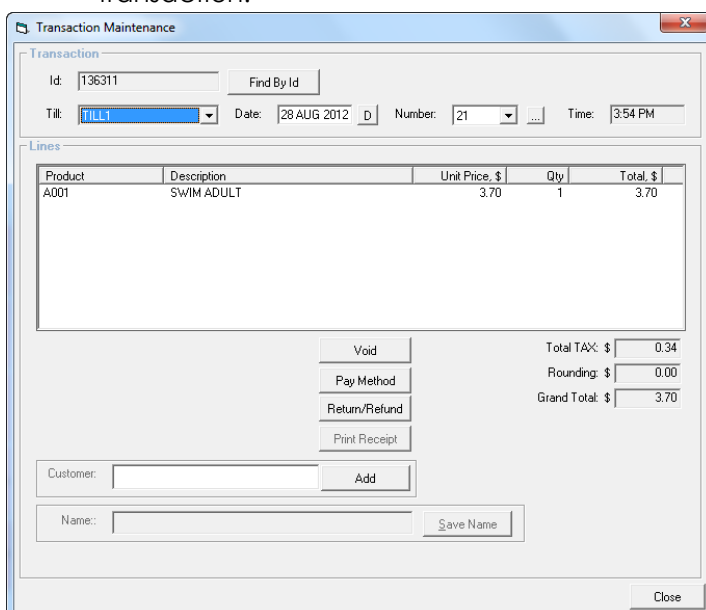
7. Select Yes or No.
8. The items been refunded will now appear on the transaction line as a negative cost ready for you to process the refund via cash, EFT or CC.

TILL1 Current Transaction			Total \$:	-23.00
Description	Qty	Amt. \$		
EAR PLUGS	-1	-7.00		
EAR PUTTY	-1	-9.00		
NOSE PLUGS	-1	-7.00		

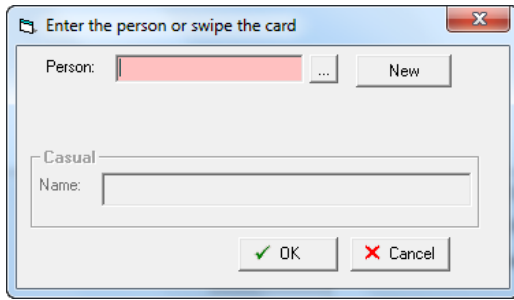
### Adding a Customer to a Previous Sale

Adding a Customer to a previous sale would be used if you need to have that particular customers name against the transaction and hadn't done so at the time of sale.

1. Find the transaction you wish to add a customer to and use finding a previous transaction.



2. Select Add.

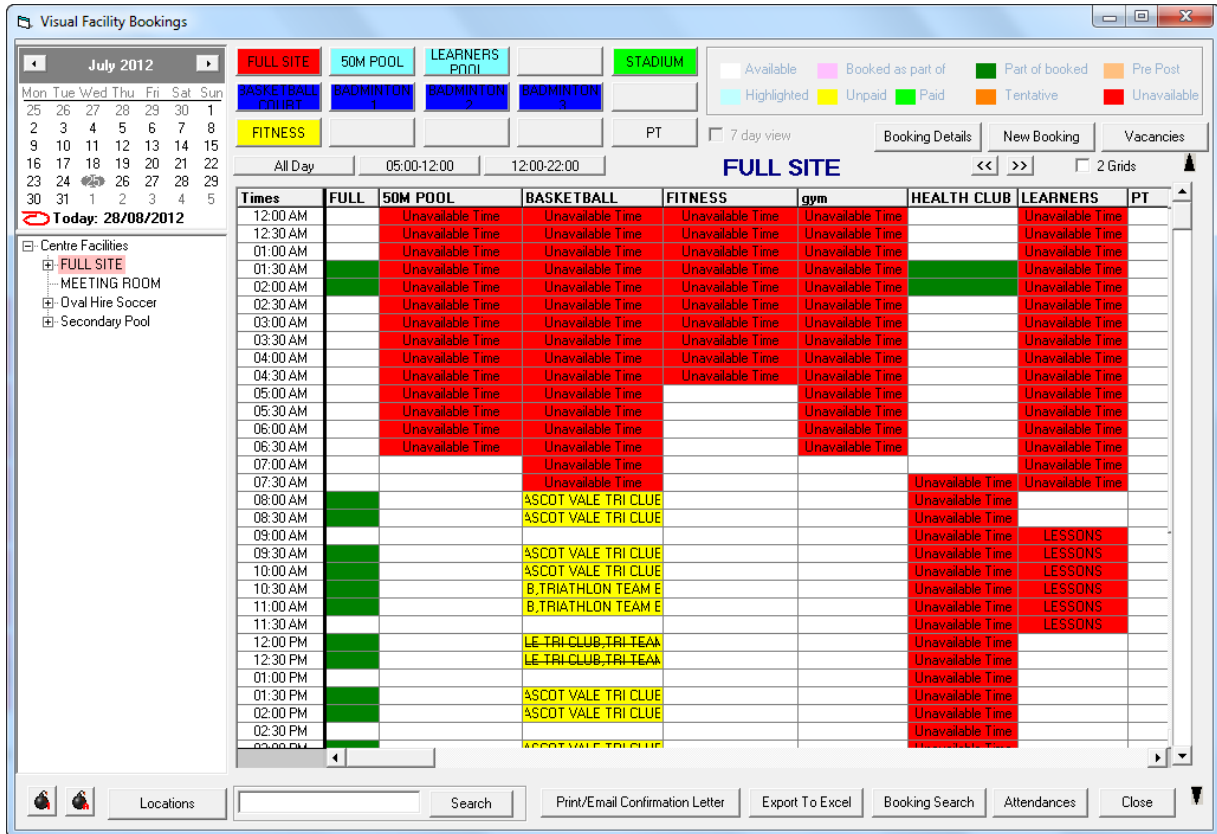


3. Search for the customer by entering their name, swiping there card or searching for them, or creating a new customer.
4. Select ok and the customer will now be assigned to the sale.

## Visual Facility Bookings

POS> Facility> Visual Facility Booking

This will bring up your Visual facility bookings screen, this is where you are able to view, make, adjust and cancel any facility bookings, Please refer to the Facility Manual for further information regarding Facility.



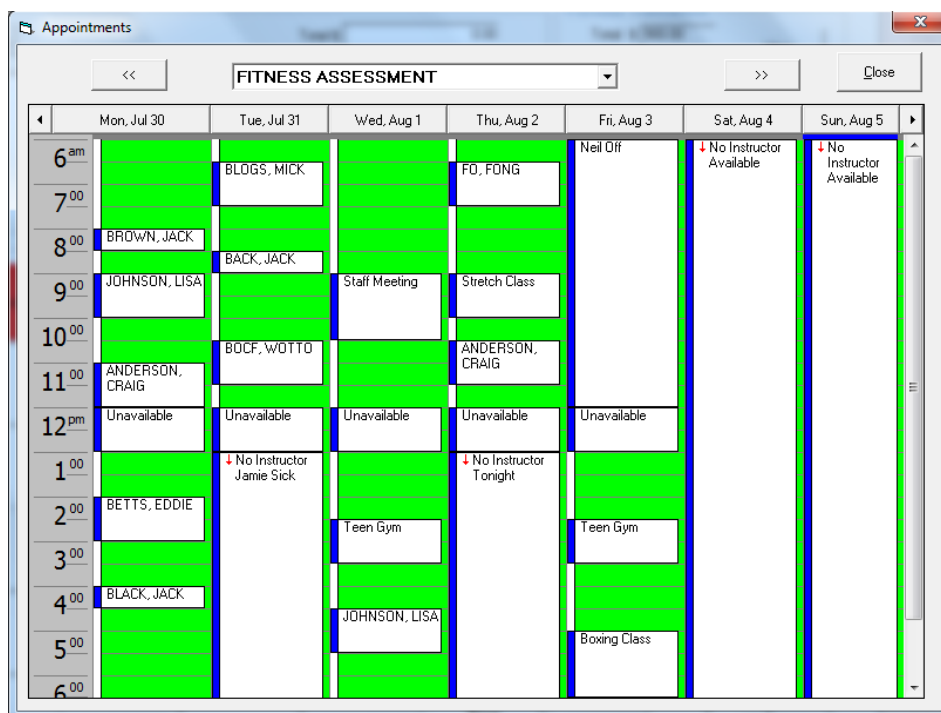
The screenshot shows the 'Visual Facility Bookings' application window. At the top, there are tabs for different facilities: FULL SITE (selected), 50M POOL, LEARNERS POOL, and STADIUM. Below these are tabs for BASKETBALL COURT, BADMINTON 1, BADMINTON 2, and BADMINTON 3. A legend indicates booking statuses: Available (white), Booked as part of (pink), Part of booked (green), Pre Post (orange), Highlighted (cyan), Unpaid (yellow), Paid (green), Tentative (orange), and Unavailable (red). The main interface features a calendar for July 2012, with the current date being 28/08/2012. A sidebar on the left lists 'Centre Facilities' including FULL SITE, MEETING ROOM, Oval Hire Soccer, and Secondary Pool. The main area displays a grid for the 'FULL SITE' facility, showing time slots from 12:00 AM to 02:30 PM. The grid columns represent different facilities: FULL, 50M POOL, BASKETBALL, FITNESS, gym, HEALTH CLUB, LEARNERS, and PT. Most time slots are marked as 'Unavailable Time' in red. Some slots are marked as 'ASCOT VALE TRI CLUE' in yellow, and others as 'LEARNERS LESSONS' in red. The bottom of the window contains a toolbar with buttons for Locations, Search, Print/Email Confirmation Letter, Export To Excel, Booking Search, Attendances, and Close.

## Appointments

POS> Appointments

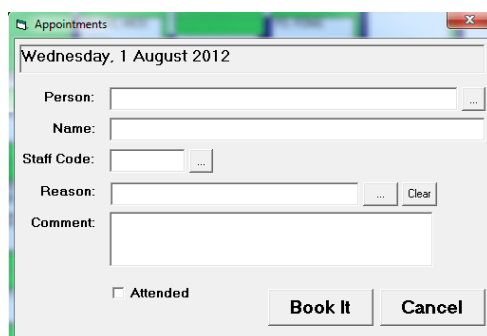
You have the ability to set up numerous Appointment types, i.e. Fitness Assessments for the gym or Centre tours for Sales. All Appointment types are set up in Admin> Admin> Appointment type setup.

The view is a week at a time and you can move forward and back by selecting the << or >> buttons.



### Making Appointments

1. Choose the Appointment type, i.e. fitness assessment.
2. Find the time you wish to book and right clicking and select add appointment or double clicking on the time you wish to make the appointment.

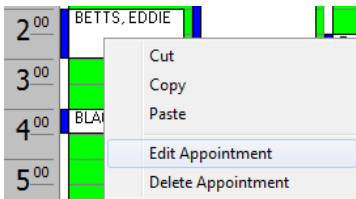


3. You can select an existing customer by selecting the search button.
4. Enter the staff that made the booking.

5. Select a reason for the booking (these are set up in Admin> Table Maintenance> Contact Reason).
6. You can add a comment if necessary.
7. Select Book It to make the booking.

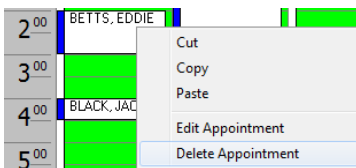
### Editing a booking

1. Right click on a booking and select Edit Appointment or double click on the appointment.



### Cancelling a booking

1. Right click on a booking Select Delete Appointment.
2. Select yes to confirm you wish to delete the appointment.

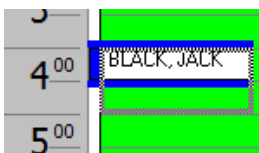


### Moving a booking

1. Hover over the booking with the mouse until you see a multi directional arrow this will be on the left hand side of that bookings box.
2. Then click and hold move the booking to the new time and release the mouse button, it will move the booking to the new time.

### Extending a booking time's length

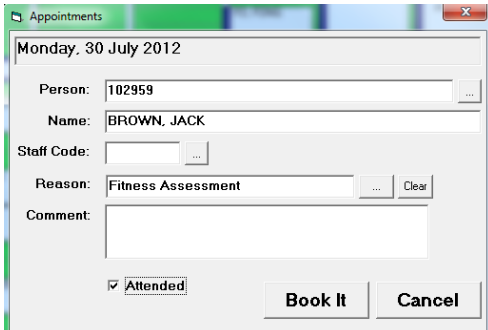
1. To extend a booking from the designated time allocated hold the mouse at the end of the booking, you will see an arrow that points up and down, click and drag down until the appropriate finish time for the appointment.





## Marking an Appointment as attended

1. Double click on the booking or right click and select edit.
2. Tick the Attended box.



3. Then select book it.

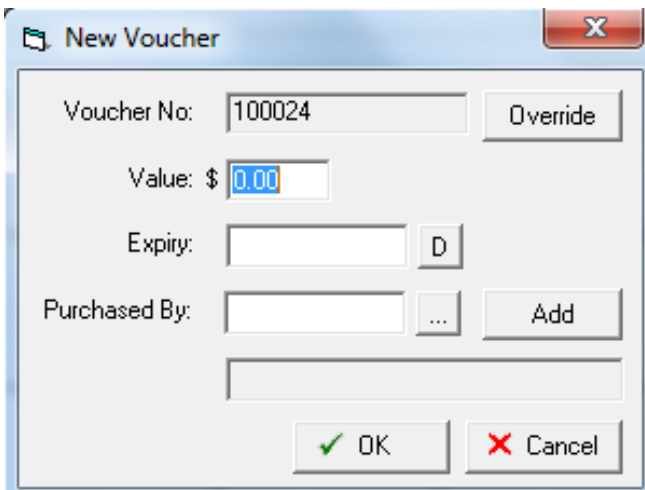
## Vouchers

### Issuing a voucher

The till must first be set up to allow for sale of voucher transaction before a button can be set to perform this function. This can be done through Admin> POS> Set up> Vouchers tab.

1. If a voucher button has been set up on your Touch Screen, select the Voucher Sale

Button or select  and then .



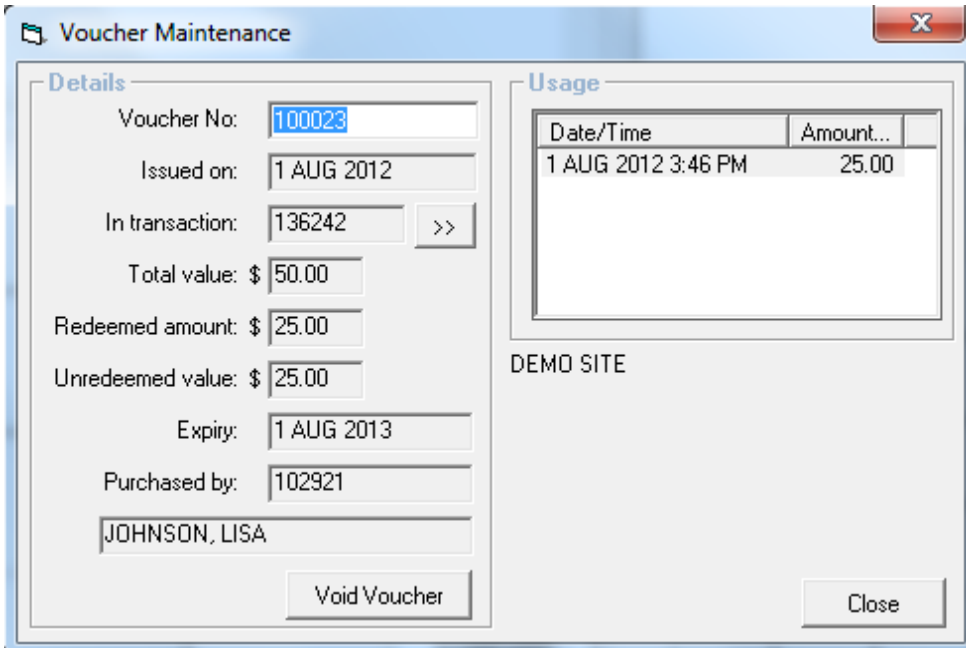
2. The voucher No will be created automatically if this was set up originally or you do have the option to type a number if you have pre printed vouchers.
3. Enter the Value of the voucher.
4. Enter the Expiry of the voucher.
5. Enter who it was purchased by, this is done by selecting the search button if they are already as a customer otherwise select Add and enter their details.
6. Once details have been filled out select OK.

- This will now show as a transaction in POS ready for you to take payment for the voucher.

### Voucher Maintenance

POS> Maintain> Vouchers

This will show you the relevant information for the voucher.



**Voucher Maintenance**

**Details**

Voucher No: 100023

Issued on: 1 AUG 2012

In transaction: 136242 >>

Total value: \$ 50.00

Redeemed amount: \$ 25.00

Unredeemed value: \$ 25.00

Expiry: 1 AUG 2013

Purchased by: 102921

JOHNSON, LISA

Void Voucher

**Usage**

Date/Time	Amount...
1 AUG 2012 3:46 PM	25.00

DEMO SITE

Close

To view the information on a voucher enter the voucher number and press enter.

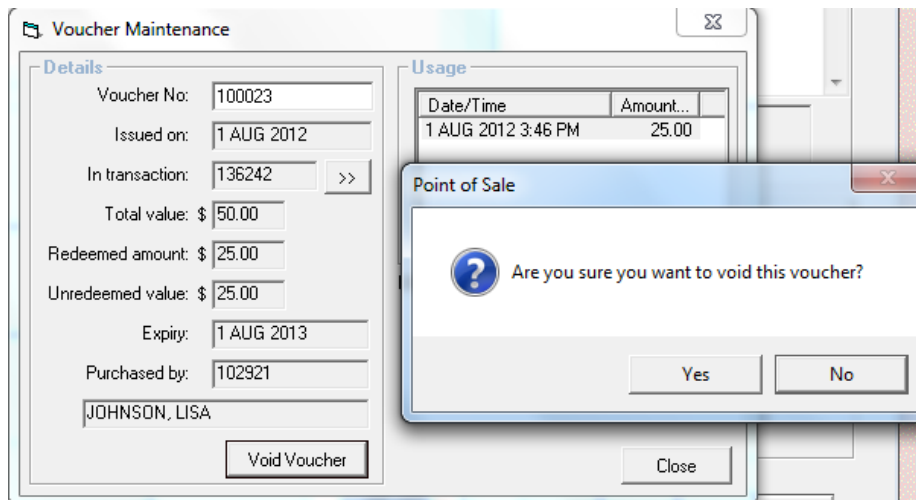
Voucher No:	This is the voucher number you are wishing to view.
Issued on:	Is when the voucher was issued.
In transaction:	This will show you the transaction for the purchase of the transaction.
Total value:	The total value the voucher.
Redeemed amount:	The amount that has been used.
Unredeemed value:	The amount that is remaining on the voucher.

## Void a Voucher

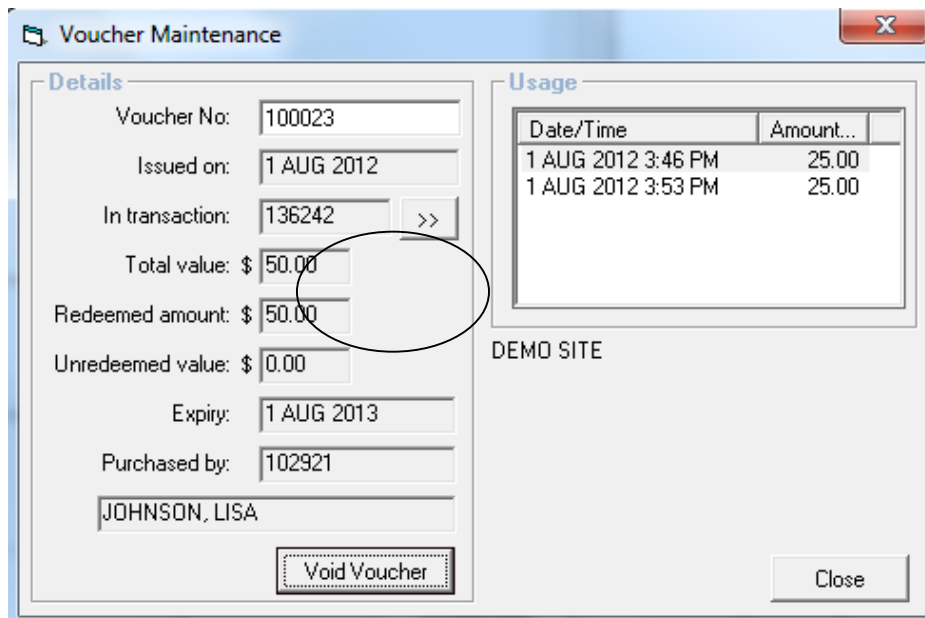
POS > Maintain > Vouchers

This enables you to void the voucher; this action will make a sale so no remaining amount is left on the voucher.

1. Enter the voucher number you wish to void and select the void button.



2. Select Yes.
3. The redeemed amount now changes to equal the amount of the total value of the voucher when it was first purchased.



## Laybys

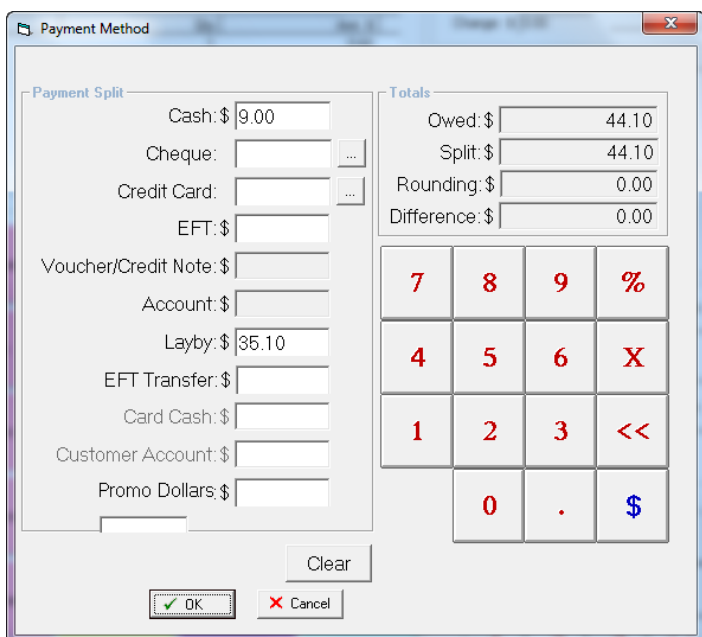
In order to process a layby, the layby process must first be set up via Admin> POS> Setup. At this point a minimum payment at time of initial lay-by and a regular payment schedule set. In the below example a minimum of 20% of the total sale is asked for at the time of setting up the layby and a payment of at least 10% is required every 14 days.

### Creating a New Layby

1. Once all goods have been selected and are on the transaction line select Layby/Split.

Cash	Voucher/ Credit Note
Cheque	Account
Credit Card	Layby/ Split
EFTPOS	Return/ Refund

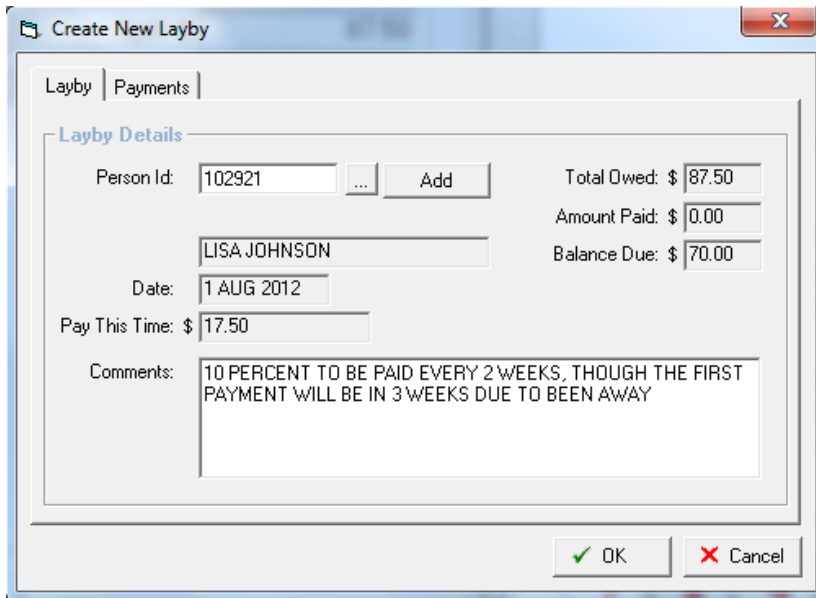
2. Enter the amount to be paid against the lay-by in the cash, cheque, credit card or EFTPOS box then click in the Layby box and the remaining to be paid will appear then select ok.



The screenshot shows a 'Payment Method' dialog box with the following details:

- Payment Split:**
  - Cash: \$9.00
  - Cheque: [ ]
  - Credit Card: [ ]
  - EFT: \$ [ ]
  - Voucher/Credit Note: \$ [ ]
  - Account: \$ [ ]
  - Layby: \$35.10
  - EFT Transfer: \$ [ ]
  - Card Cash: \$ [ ]
  - Customer Account: \$ [ ]
  - Promo Dollars: \$ [ ]
- Totals:**
  - Owed: \$ 44.10
  - Split: \$ 44.10
  - Rounding: \$ 0.00
  - Difference: \$ 0.00
- Keypad:**
  - Row 1: 7, 8, 9, %
  - Row 2: 4, 5, 6, X
  - Row 3: 1, 2, 3, <<
  - Row 4: 0, ., \$

3. Depending on the parameters set in Admin> POS> Setup, if an inadequate payment is allocated to initialise the lay-by, Links will specify the minimum amount required to do so.
4. After the correct amount of minimum payment is made Links will ask for details of the purchaser. If the customer is not already in Links as an existing customer then they can be added and any relevant comments can also be input at this stage.



Create New Layby

Layby | Payments

**Layby Details**

Person Id: 102921 ... Add Total Owed: \$ 87.50

Amount Paid: \$ 0.00

LISA JOHNSON Balance Due: \$ 70.00

Date: 1 AUG 2012

Pay This Time: \$ 17.50

Comments: 10 PERCENT TO BE PAID EVERY 2 WEEKS, THOUGH THE FIRST PAYMENT WILL BE IN 3 WEEKS DUE TO BEEN AWAY

OK Cancel


5. Select OK and you are then prompted to finalise the transaction.

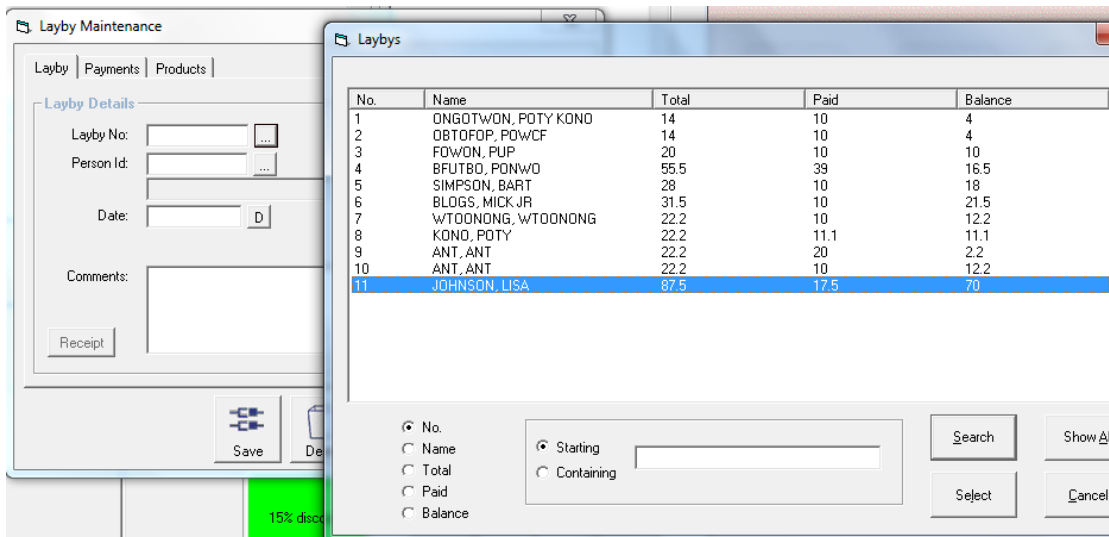
Note: The payment schedule will require to be updated when any ongoing payments are made towards a lay-by. Especially in the event when a payment is made that is above the required scheduled payment, the new schedule will display the new required minimum payment. Links will prompt for this to be done for every payment made.

## Layby History

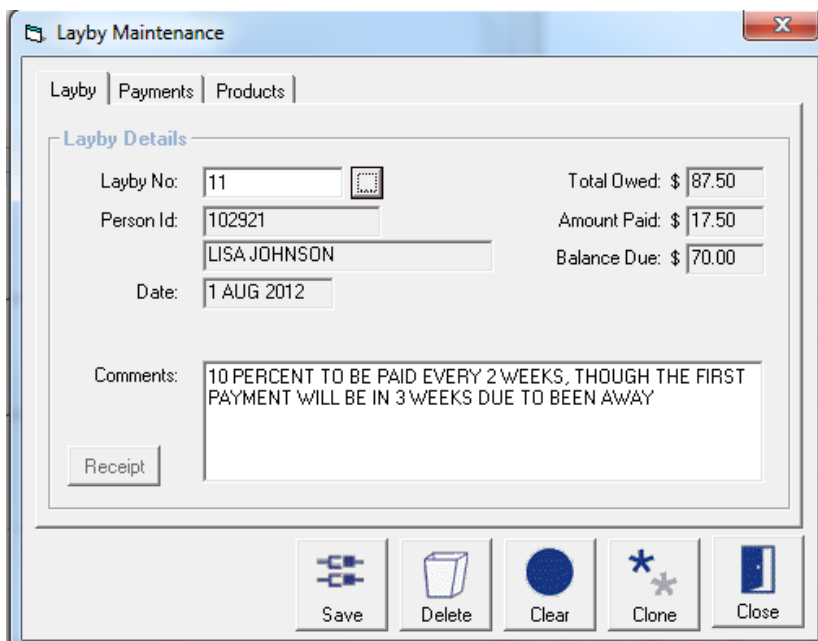
POS> Maintain> Layby

This allows you to view a Lay-bys history, payments made, amount remaining.

1. Enter in the lay-by number if known otherwise click on the search button 



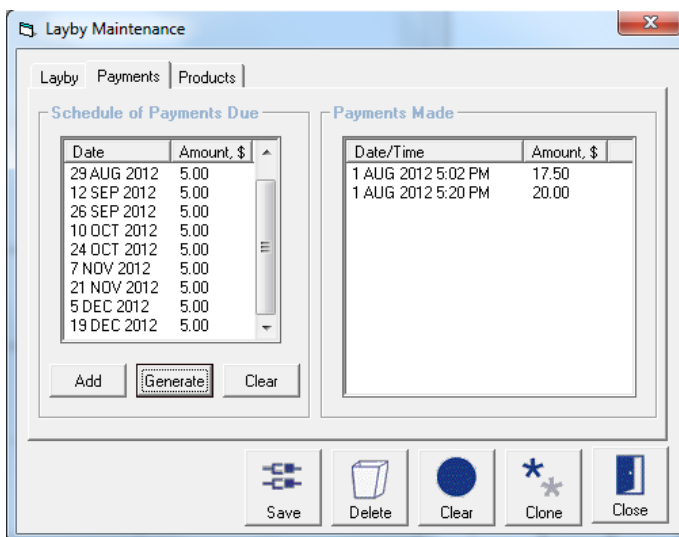
2. Select the lay-by you wish to view by double clicking on the particular record.



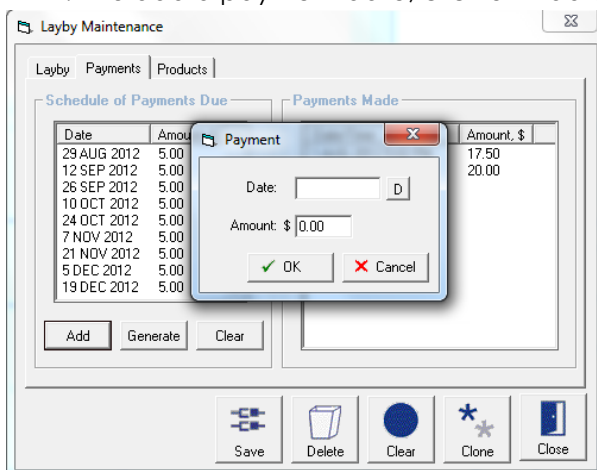
- Layby No: This is the Layby number
- Person Id: This is the customer and their number
- Date: This is the date the layby was started
- Total owed: The total amount of the layby
- Amount paid: The amount paid so far on the layby
- Balance due: The remainder left to pay on the layby
- Comments: Any comments on the layby

### Payments Tab


The payments tab displays the schedule of payments (this has been automated in response to the POS set up process in Administration) and also the payments made.

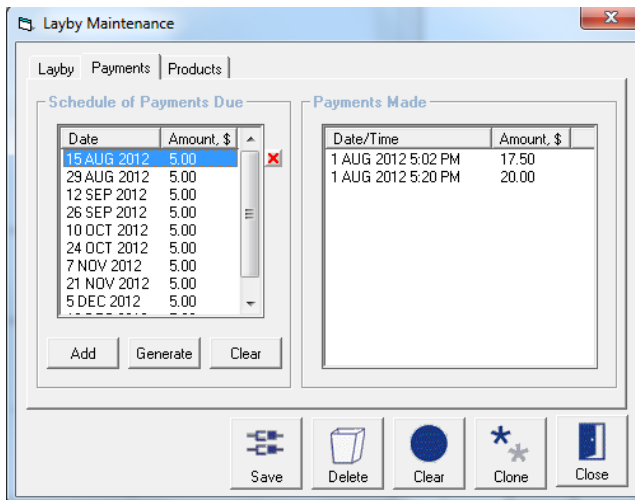


1. To add a payment date, click on Add and enter the date with the amount to be paid.



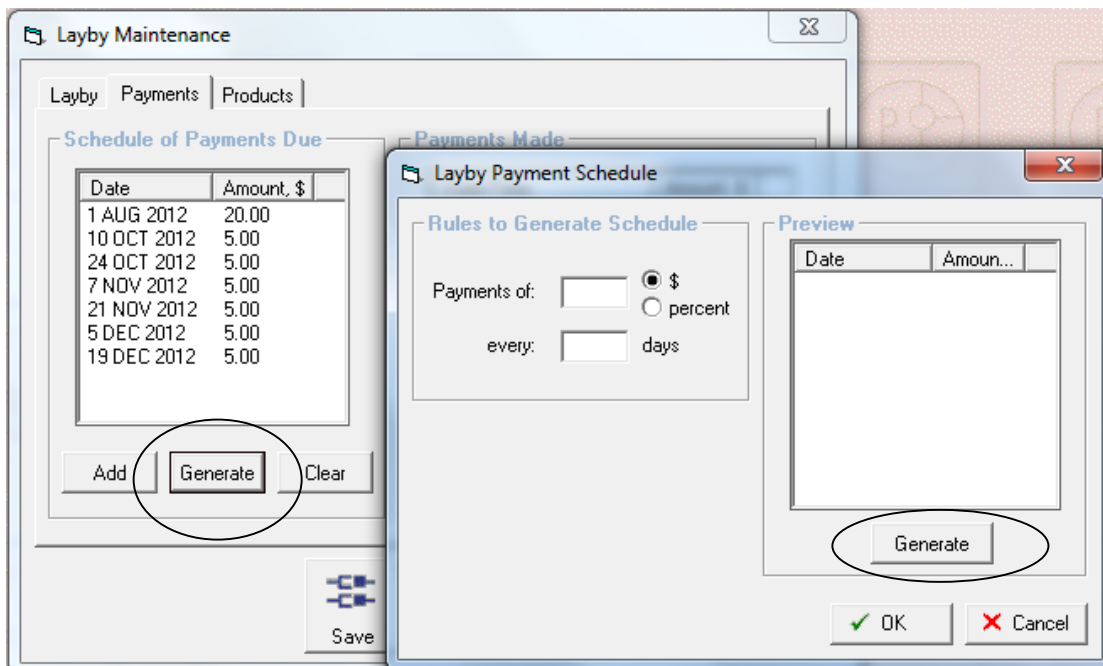
2. Enter the date and amount to be paid and select ok

- To delete a payment date, click on the date to highlight it and Click on  to delete that line.



### Edit a Lay-by Payment Schedule

The payment schedule for an individual lay-by can be altered rather than accepting the automatic generated schedule.



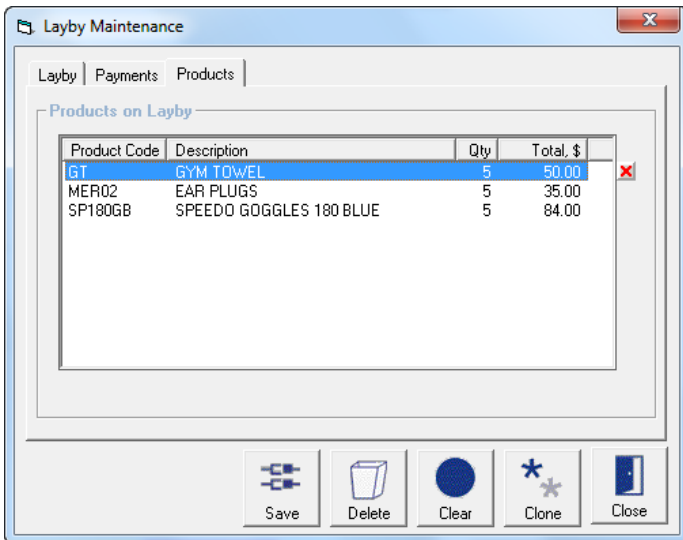
- Select Generate. You will now be prompted to enter the dollar or percentage figure and the regularity.
- Select Generate to then preview the results of the data entered before applying it to the customer's record. If the results are appropriate then select OK to finalise the change.



Warning: Clear will clear the entire payment schedule and will do so without providing a warning.

### Products Tab

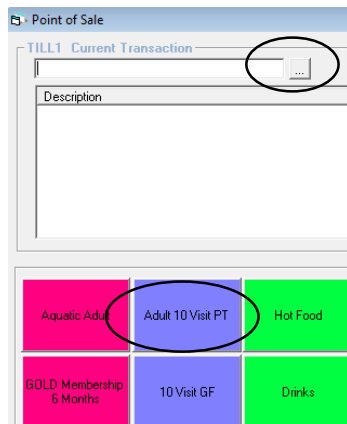
This shows you the products that have been placed on the layby; you have the option to delete a item by selecting it and selecting the red cross on the far right of the line



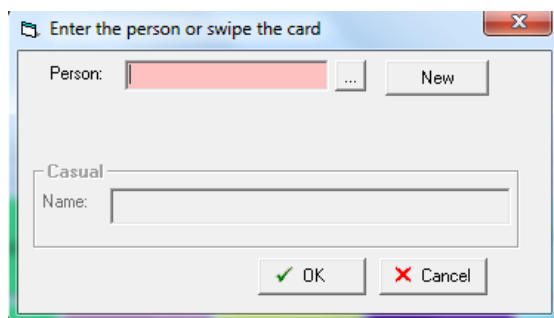
## Visit Passes


### Issuing a Visit Pass

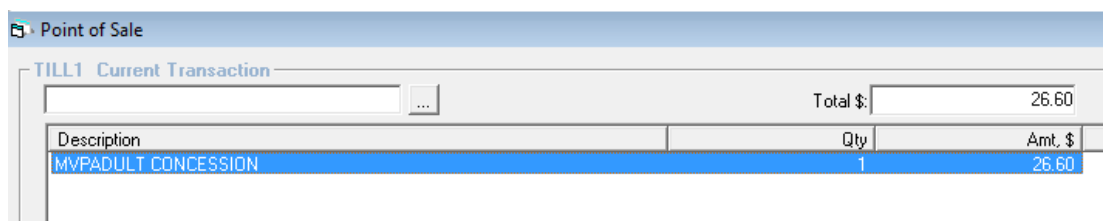
Generally a Visit Pass will be allocated to a touch screen button, or a user can search using the product search button located to the right of the current transaction screen.



1. Select the visit pass you wish to sell using one of the two above mentioned options. The following screen will appear.



2. Enter the person ID, swipe a customer's card, search for the customer using the search button  or click on NEW to create a new customer.
3. Click on OK, You will then be redirected to POS to finalise the transaction.

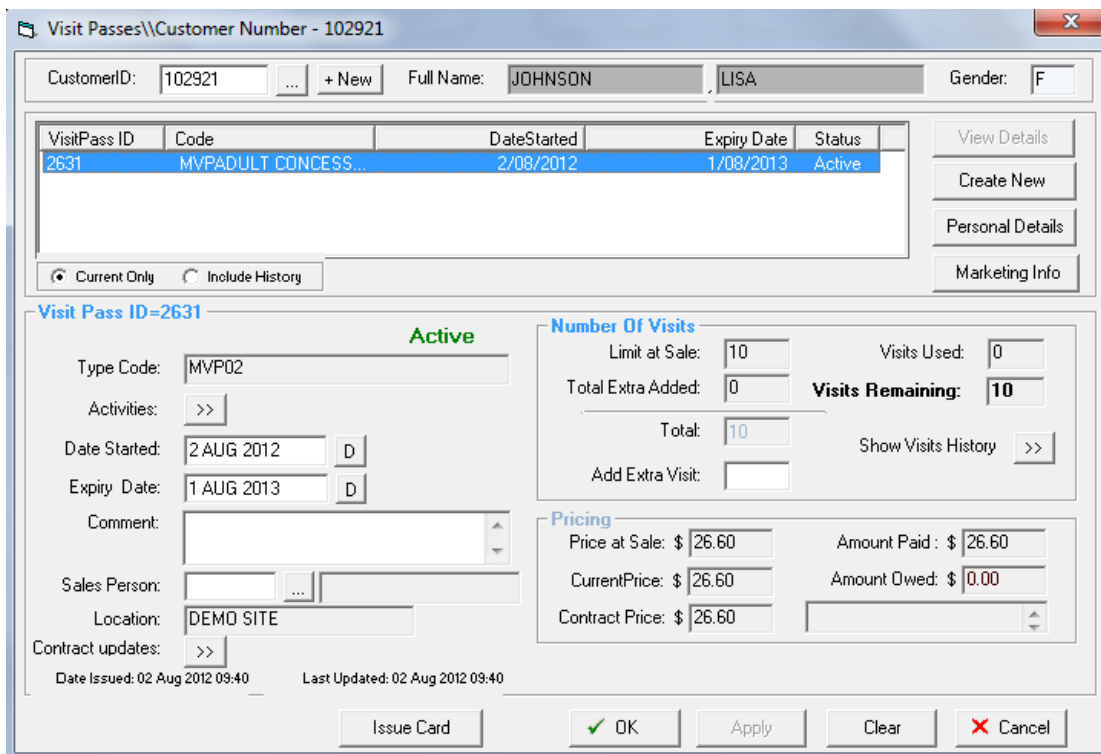


## Maintaining a Visit Pass (VP)

POS> Maintain> Visit Pass

This is where you view all the information of a visit pass

1. Enter the customer ID, swipe a customer's card, or search for the customer using the search button.
2. If the customer has multiple visit passes you need to select the one you wish to view the details for.



The screenshot shows a software window titled "Visit Passes\Customer Number - 102921". At the top, it displays "CustomerID: 102921" and "Full Name: JOHNSON, LISA" with a "Gender: F" dropdown. Below this is a table of visit passes:

VisitPass ID	Code	DateStarted	Expiry Date	Status
2631	MVPADULT CONCESS...	2/08/2012	1/08/2013	Active

Buttons for "View Details", "Create New", "Personal Details", and "Marketing Info" are on the right. Below the table, there are radio buttons for "Current Only" (selected) and "Include History".

The main section is titled "Visit Pass ID=2631" and shows the status "Active". It includes several input fields and sections:

- Type Code:** MVP02
- Activities:** >>
- Date Started:** 2 AUG 2012 (with a calendar icon)
- Expiry Date:** 1 AUG 2013 (with a calendar icon)
- Comment:** (empty text area)
- Sales Person:** (empty dropdown)
- Location:** DEMO SITE
- Contract updates:** >>
- Date Issued:** 02 Aug 2012 09:40
- Last Updated:** 02 Aug 2012 09:40

The **Number Of Visits** section shows:

- Limit at Sale: 10
- Visits Used: 0
- Total Extra Added: 0
- Visits Remaining: 10**
- Total: 10
- Add Extra Visit: (empty input)
- Show Visits History: >>

The **Pricing** section shows:

- Price at Sale: \$ 26.60
- Amount Paid: \$ 26.60
- Current Price: \$ 26.60
- Amount Owed: \$ 0.00
- Contract Price: \$ 26.60

At the bottom, there are buttons for "Issue Card", "OK", "Apply", "Clear", and "Cancel".

Full Name	Is the customer's full name of that visit pass.
Visit pass id	Is the contract number for that visit pass.
Code	Is the type of visit pass.
Date started	Is the date the visit pass started
Expiry date	This is the date the visit pass will expire
Status	Shows if the visit pass is active, expired or in the future.
Activities	Will show any activities this visit pass is allocated to.
Comments	Any comments on the visit pass.
Sales person	Who was the sales person.

Contract updates This will show you any changes that have been made to the visit pass.

**Number of visits**

- Limit at sale This is the number of visits that the contract was sold with.
- Visits used Will show the amount of visits used.
- Total Extra Added Will show if any extra visits have been given.
- Visits remaining The amount of visits left.
- Add extra visits This is to add any extra visits.
- Show visit history Will show you the history of the visits, when they were used and allow you to use extra visits against the customer.

**Pricing**

- Price at sale How cost of the visit pass cost when sold.
- Current price The current price of the visit pass.
- Contract price The price the visit pass was sold for.
- Amount paid How much was paid on the visit pass.
- Amount owed If there is any monies owing for a visit pass.

Create New

Will create a new visit pass; note doing it this way will not charge the customer.


Personal Details

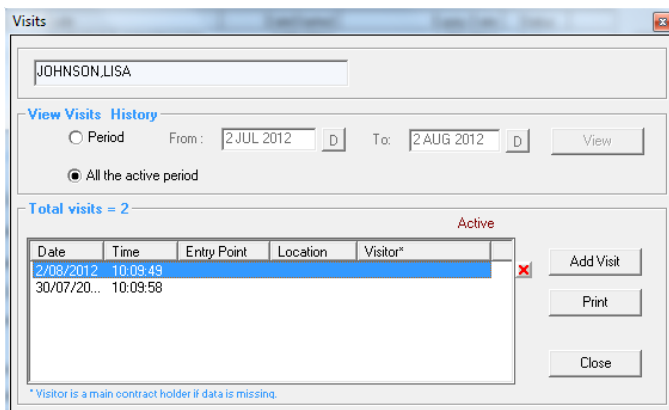
Will take you to the customer screen to view or change personal information of the customer.

Marketing Info

Will take you to the marketing screen for this customer.

*Visit History*

1. Select the show visit history button 



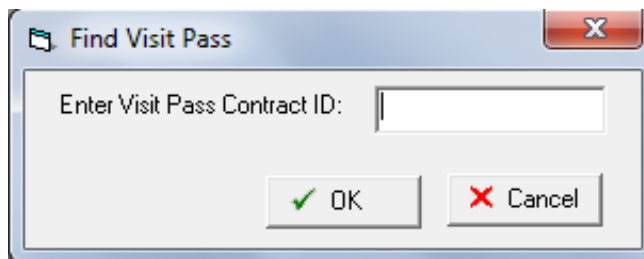
2. Select if you wish to see all visits over the active period or during a specific period, if a specific period enter the from and to dates and select view.
3. Any visits made during the selected dates will now appear.
4. If any visits have occurred and not been recorded at the POS they can be added via

5. To Delete a visit simply select the visit you wish to delete and then select the 
6. To print the visit history select

### Finding a Visit Pass by Contract Id

POS> File> Find Visit Pass

This Screen allows you to search for a Visit Pass from the contract ID number.

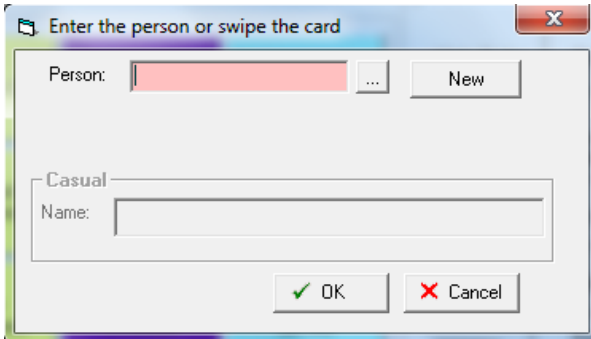



1. Enter the Contract ID number and press Enter or select OK.
2. The above visit pass screen will appear and show the customer that holds that contract number.

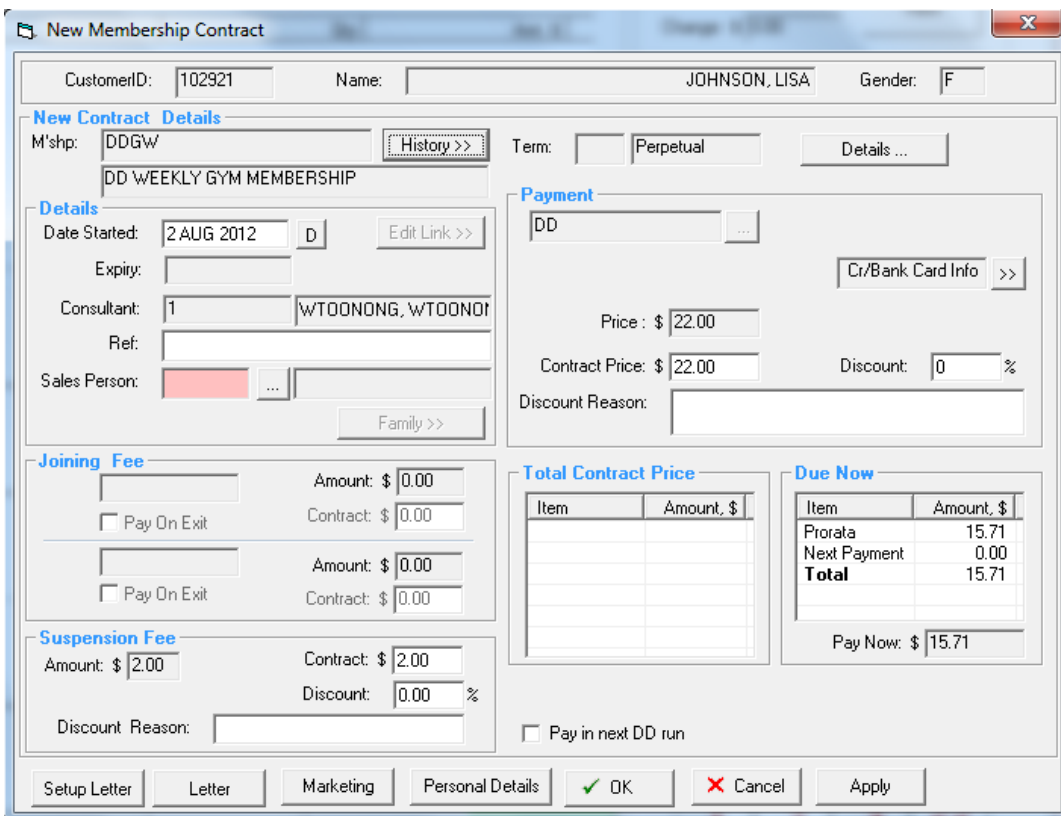
## Selling a membership

As like a Visit Pass generally Memberships will be allocated to a Touch screen button.

1. Select the membership you wish to sell.



2. Enter the person ID, swipe a customer's card, search for the customer using the search  button or click on NEW to create a new customer.
3. Click on OK and the new membership contract screen will appear.
4. Change any details that are necessary making sure there are no pink areas as these are mandatory fields.



**New Membership Contract**

CustomerID: 102921    Name: JOHNSON, LISA    Gender: F

**New Contract Details**  
 M'shp: DDGW    History >>    Term: Perpetual    Details ...  
 DD WEEKLY GYM MEMBERSHIP

**Details**  
 Date Started: 2 AUG 2012    D    Edit Link >>  
 Expiry:   
 Consultant: 1    WTOONONG, WTOONONG  
 Ref:   
 Sales Person:   
 Family >>

**Payment**  
 DD    Cr/Bank Card Info >>  
 Price: \$ 22.00  
 Contract Price: \$ 22.00    Discount: 0 %  
 Discount Reason:

**Joining Fee**  
 Amount: \$ 0.00    Contract: \$ 0.00  
 Pay On Exit  
 Amount: \$ 0.00    Contract: \$ 0.00  
 Pay On Exit

**Suspension Fee**  
 Amount: \$ 2.00    Contract: \$ 2.00  
 Discount: 0.00 %  
 Discount Reason:

**Total Contract Price**

Item	Amount, \$

**Due Now**

Item	Amount, \$
Prorata	15.71
Next Payment	0.00
<b>Total</b>	<b>15.71</b>

Pay Now: \$ 15.71  
 Pay in next DD run

Setup Letter    Letter    Marketing    Personal Details    OK    Cancel    Apply

## New Contract Details

History: Shows the history of memberships held by the customer.

Details: Displays the details of the membership.

### Details

Date Started: Defaults to the current day, but can be changed if required by selecting the D.

Date Expired: This will show if there is a set end date for a membership, note DD memberships with no end date will not have a end date here, only term contracts.

Reference: This field can be used for entering an internal reference.

Sales Person: The Sales Person responsible for the membership can be selected here. Note: The Staff member must be setup as a Sales Person in their Setup screen to be able to be selected here.

### Payment

Payment Details: The payment details of the membership can be changed if the user has the security access to do so. A discount reason will be required.

CC/Bank Info: Allows the user to enter debit detail for Direct Debit memberships.

Contract price: This is what will be charged on each debit date, If this is changed this will be the price the member is debited.

Discount: If you wish for this member to have a discount, put in the percentage here or change the contract price.

Reason: If changing the contract price you will need to enter a reason.

### Joining Fee

Join Fee: Shows the Join Fee if applicable allocated to the membership.

### Suspension Fee

Suspension: Shows any suspension fees allocated to the membership, discount can be given here, if so a reason will need to be provided.

### Due Now

Prorata: This is the amount the member will need to pay to get them in line with the current debiting cycle.

**Next Payment:** This will display the first debit amount if the person joins too close to the next debit date, so admin have enough time to enter their CC/bank details.

**Pay in next DD run:** Tick this box to allow this first payment to be taken in the first direct debit run, so no money will be taken at time of sale.

Setup Letter

Used to setup a letter for issuing to a customer provided it has been setup as a template in the Administration Module.

Letter

Used to issue a letter allocated in Setup Letter.

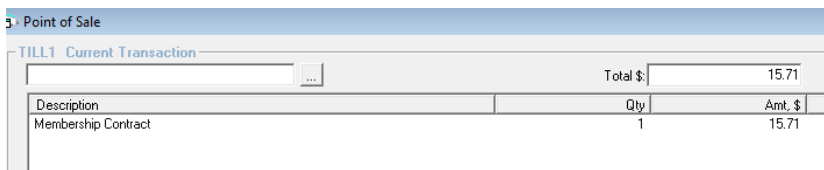
Marketing

Marketing details specific to the customer contract can be entered here. These details are different to a customer's marketing details and are only for the contract being purchased. Refer to the Members Module – Contract Marketing for further details.

Personal Details

Will take you to the customer setup screen this is where you can double check a members details are entered.

5. If the details of the membership are accurate click on OK and you will then be redirected to POS to finalise the transaction.



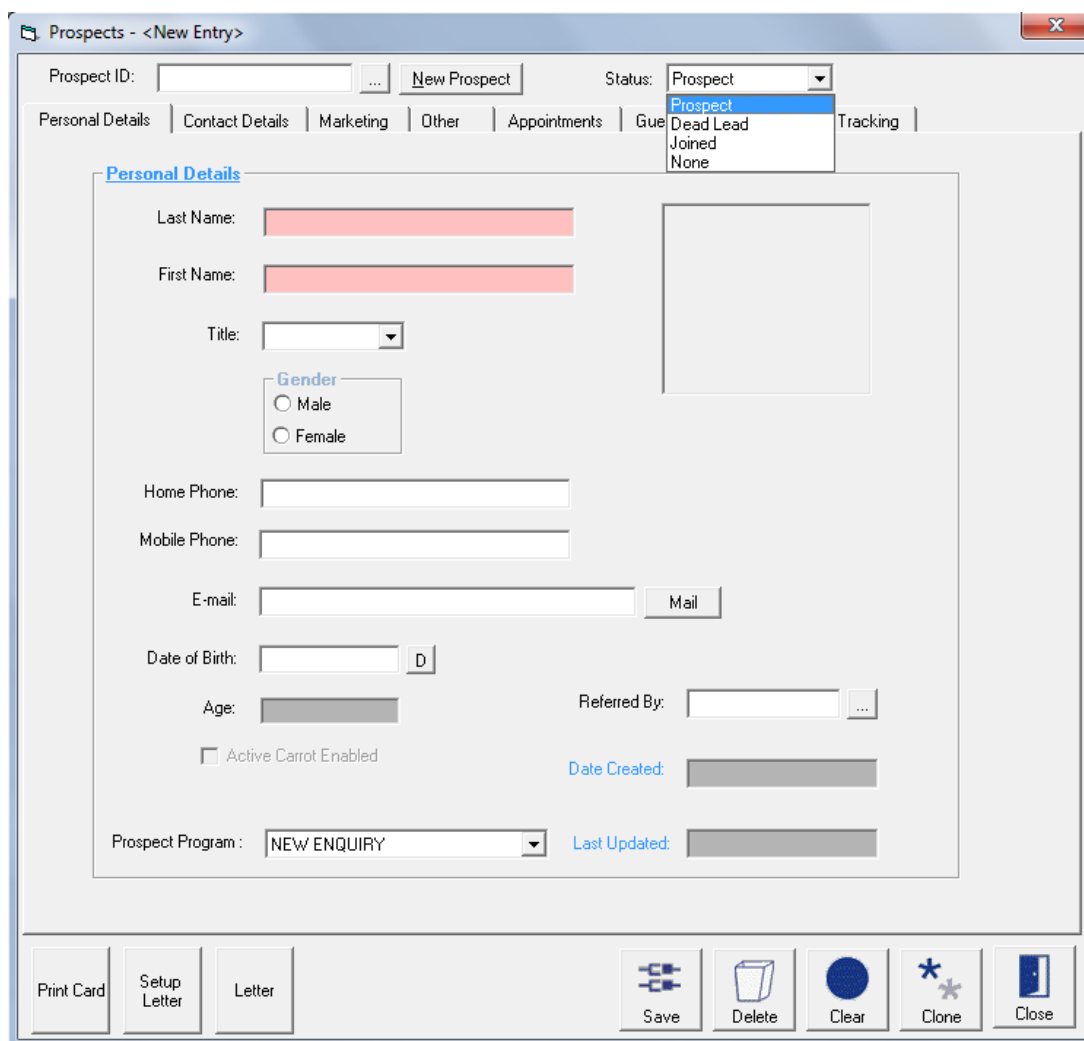
TILL1 Current Transaction		
		Total \$: 15.71
Description	Qty	Amt, \$
Membership Contract	1	15.71



## Adding a Prospect

POS> Customers> Prospects

A prospect is a potential customer; you have the option to enter your prospects via this screen. Links will generate a Prospect ID number (only the name and gender are required to generate a new Prospect ID number) for a New Prospect. You are also able to search for a prospect that has already been entered.



Details of priority in tracking and any appointments made can then be produced via Reporting> Marketing for follow up. See Customer Marketing Details in the Members manual for further information.

As the prospect's status changes it can also be updated as Dead Lead or whichever is most applicable from the status available in the drop-down list. When a prospect is sold a membership it will automatically be changed to joined provided the same Customer ID has been used.

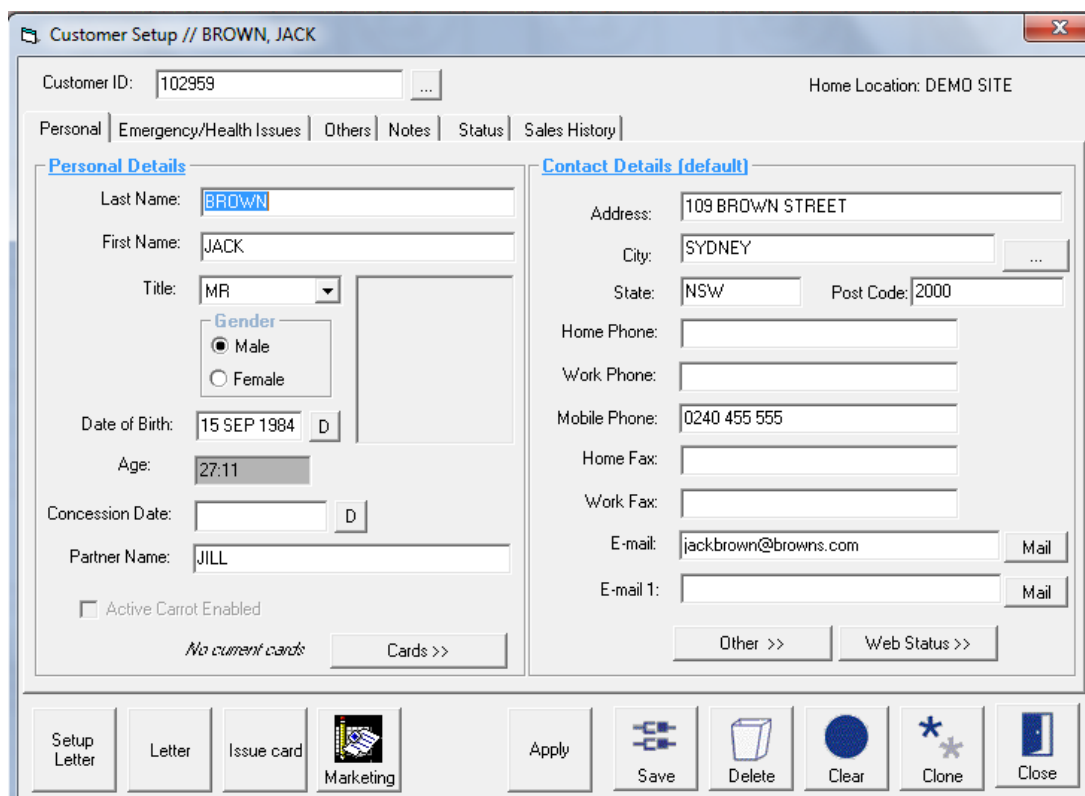
## Customer Set Up Screen

POS > Customers > Customers

Customer Set up is for creating a new customer or If you wish to view a customer's record for various details e.g. status of record; address, emergency or health details to name a few.

### Personal Tab

This page allows you to enter the general personal and contact details, on this screen you can also enter a concession date, Allocate or view membership cards, enter other contact details and activate the customer for Web status and change their password.



### Common buttons



Click on this if you wish to set up a letter to send to this Customer, Note these are Set up in Admin.



Click on this if you wish to send a letter to this customer.



Click on this if you wish to make a card for the customer, this is not a pre printed card.



Click on this to go to this customers marketing screen.



Click on apply if you wish to save the details you have entered and want to continue editing.



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



Click on this icon to delete this entry.



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



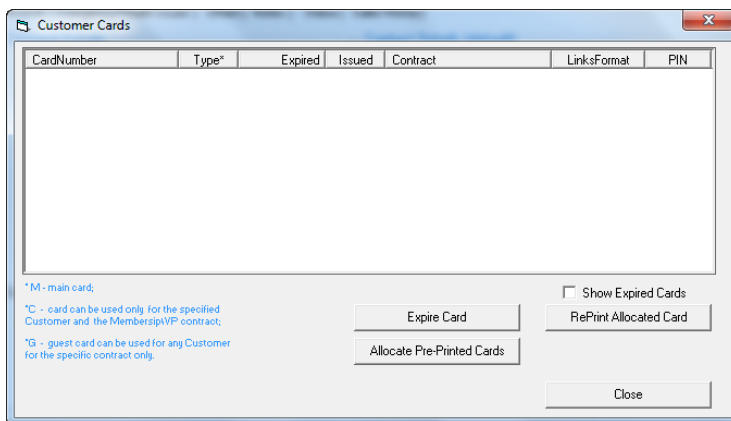
Click on this icon if you wish clone/copy the current window.



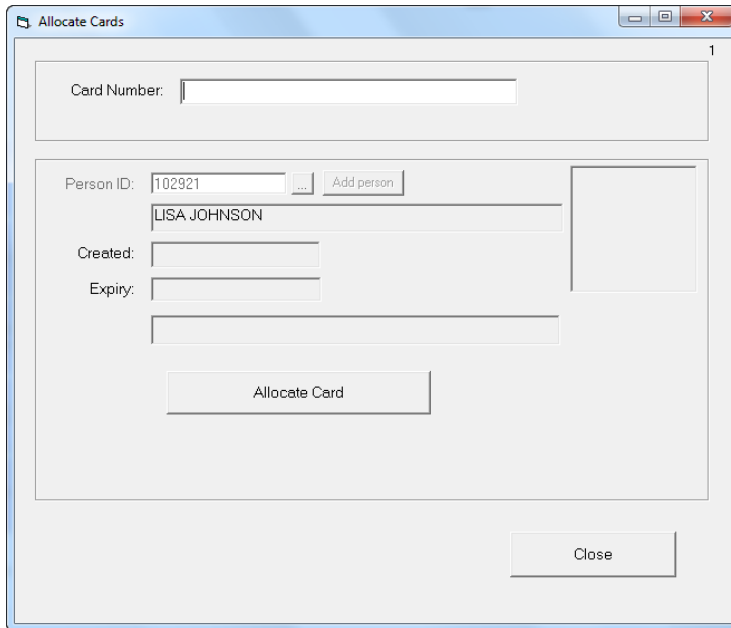
Click on this icon if you wish to close out of the window.

To allocate a pre printed card for this Customer

1. Select 

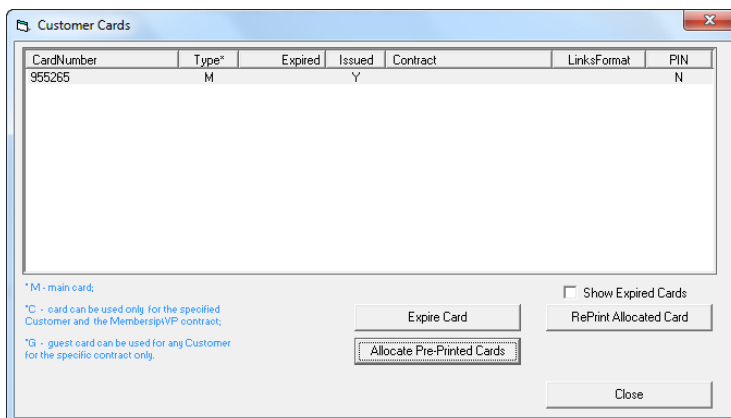


2. Select Allocate Pre-Printed Cards.



3. Scan the card, and then select allocate card.

4. Then select close you will now see the card is against this customer.



CardNumber	Type*	Expired	Issued	Contract	LinksFormat	PIN
955265	M		Y			N

\*M - main card;  
 \*C - card can be used only for the specified Customer and the Membership/VP contract;  
 \*G - guest card can be used for any Customer for the specific contract only.

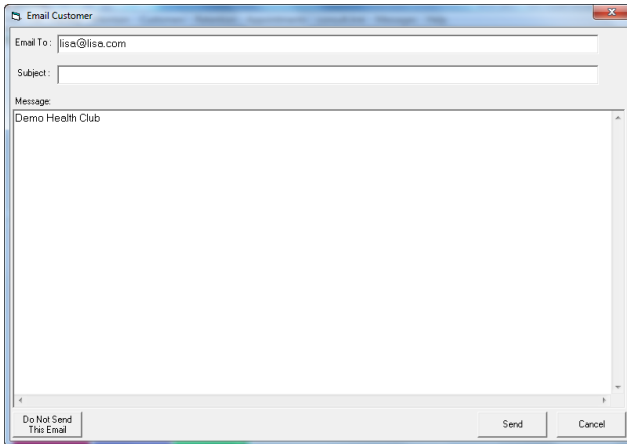
Buttons: Expire Card, RePrint Allocated Card, Allocate Pre-Printed Cards, Close

Checkbox:  Show Expired Cards

5. To remove that card from the customer, highlight the card and select the Red Cross or the far right of the line or select Expire Card.

To email a Customer from the Customer Screen

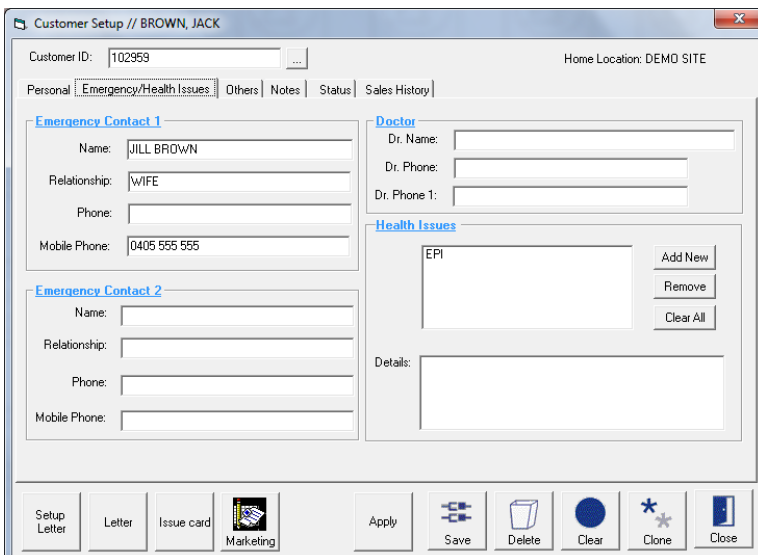
1. Select Mail next to the desired email address



2. Write the email as normal, have a subject and the message and then select send.

## Emergency/Health Tab

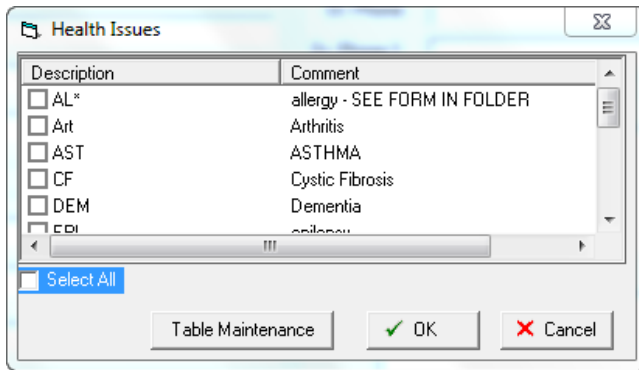
This tab shows you emergency contact details, doctor contact details and any known health issues. These can be updated at any time.



### Adding Health Issues

Providing this has been setup prior in admin> table maintenance. Reminder that you need to have a Three letter description for a health issues as this is printed on student roles, so for privacy reasons.

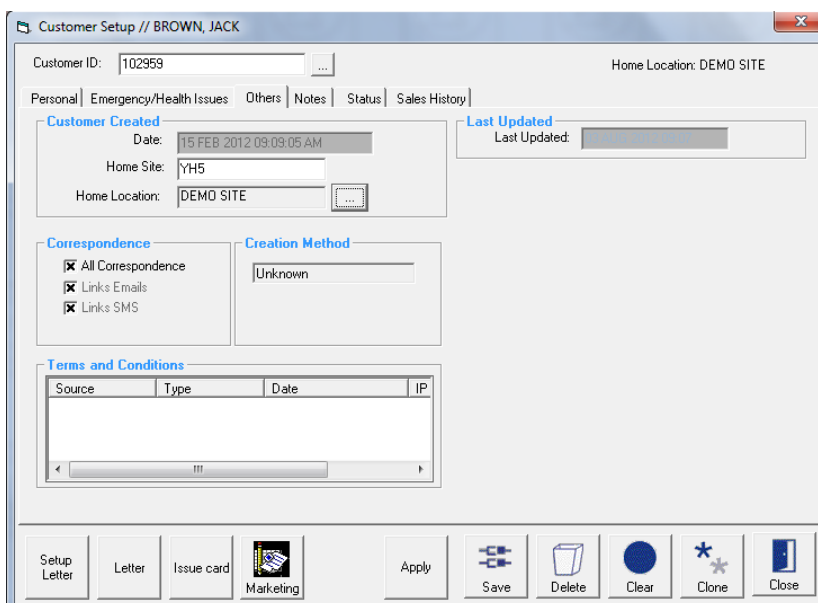
1. Select Add new.



2. Select the health issue that is appropriate, you have the option to add new Health issues from table maintenance if there is none.
3. Select Ok.
4. To remove a health issue, highlight the health issue and select remove.

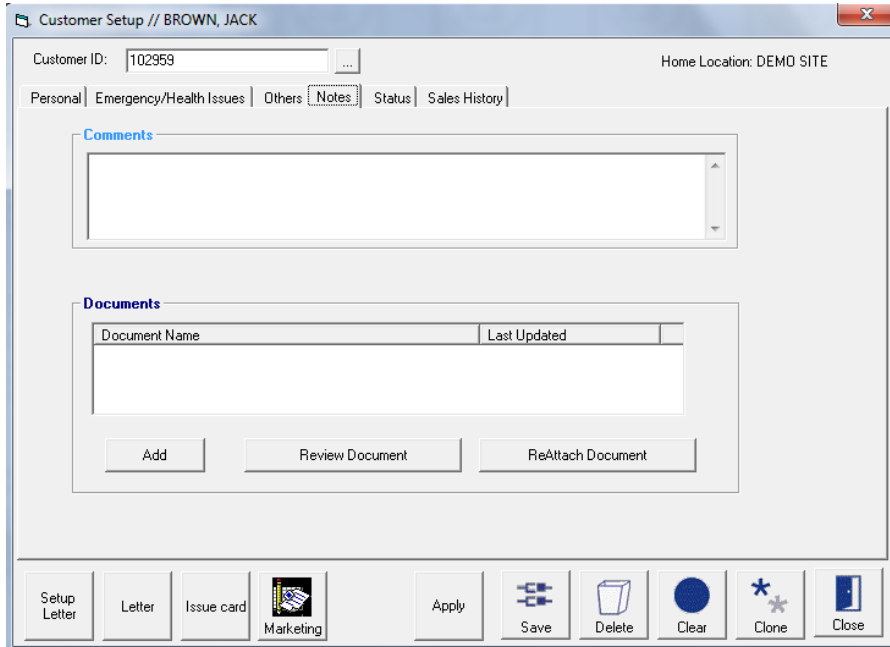
### Others tab

This tab shows when the Customer was created, their home location for their membership, how to correspond with the Customer, any terms and conditions and when they were last updated. You can remove for an individual customer not to receive correspondence by unselecting the boxes.



## Notes Tab

This tab allows you to place or read any comments on this Customer, as well as add or read documents that have been attached to the Customer.



Customer Setup // BROWN, JACK

Customer ID: 102959 Home Location: DEMO SITE

Personal | Emergency/Health Issues | Others | **Notes** | Status | Sales History

**Comments**

**Documents**

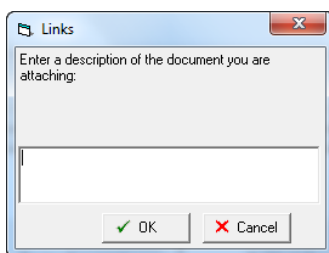
Document Name	Last Updated
---------------	--------------

Add Review Document ReAttach Document

Setup Letter Letter Issue card Marketing Apply Save Delete Clear Clone Close

To attach a document to a customer

1. Select add
2. Find the file you wish to attach and select open.

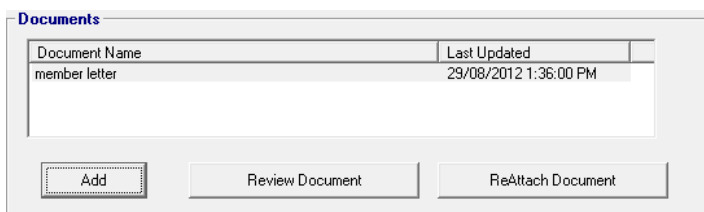


Links

Enter a description of the document you are attaching:

OK Cancel

3. Write in the description of the document and select ok.
4. It will now show as a document.



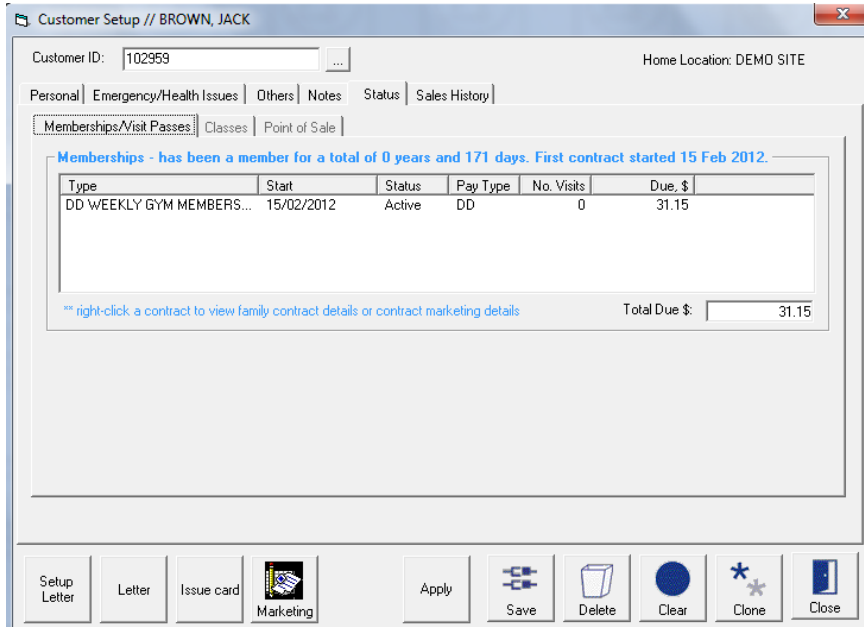
**Documents**

Document Name	Last Updated
member letter	29/08/2012 1:36:00 PM

Add Review Document ReAttach Document

## Status Tab

This tab will show you any memberships, visit passes, classes or vouchers/credit notes that are assigned to this customer.



Customer Setup // BROWN, JACK

Customer ID: 102959 Home Location: DEMO SITE

Personal | Emergency/Health Issues | Others | Notes | Status | Sales History

Memberships/Visit Passes | Classes | Point of Sale

Memberships - has been a member for a total of 0 years and 171 days. First contract started 15 Feb 2012.

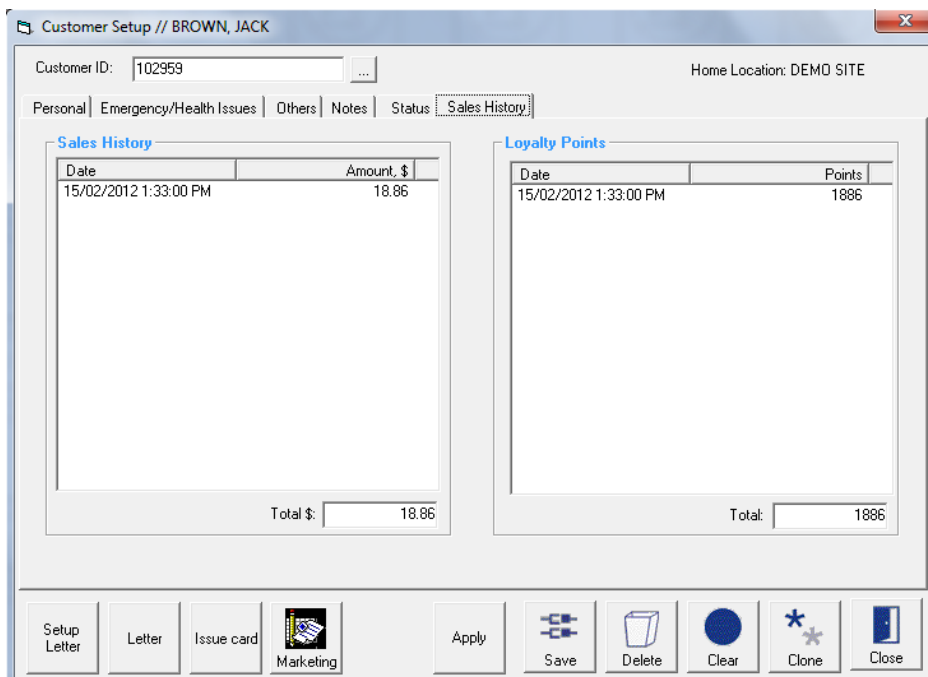
Type	Start	Status	Pay Type	No. Visits	Due, \$
DD WEEKLY GYM MEMBERS...	15/02/2012	Active	DD	0	31.15

Total Due \$: 31.15

Setup Letter | Letter | Issue card | Marketing | Apply | Save | Delete | Clear | Clone | Close

## Sales History Tab

Will show the sales history, this will show any sales that have been placed against this customer.



Customer Setup // BROWN, JACK

Customer ID: 102959 Home Location: DEMO SITE

Personal | Emergency/Health Issues | Others | Notes | Status | Sales History

Sales History

Date	Amount, \$
15/02/2012 1:33:00 PM	18.86

Total \$: 18.86

Loyalty Points

Date	Points
15/02/2012 1:33:00 PM	1886

Total: 1886

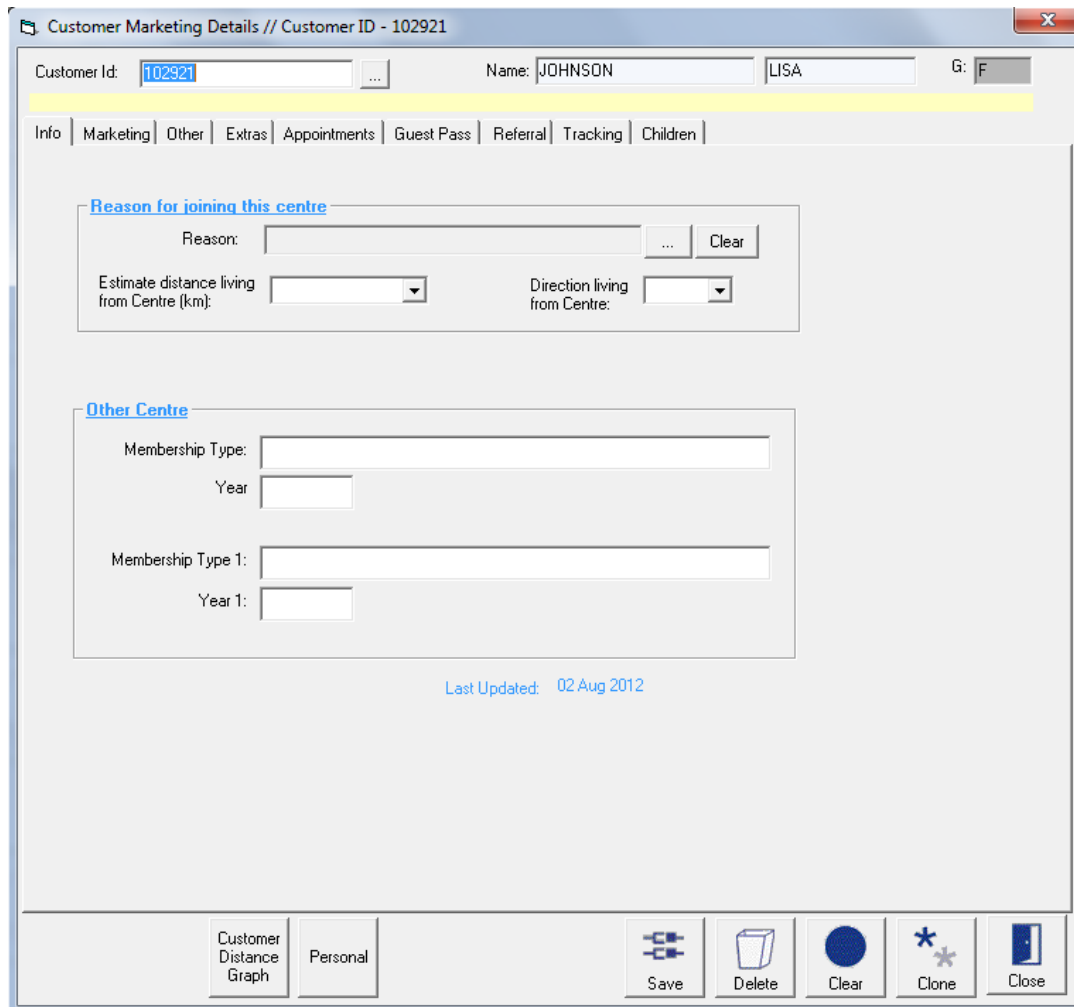
Setup Letter | Letter | Issue card | Marketing | Apply | Save | Delete | Clear | Clone | Close



## Customer Marketing Details

POS> Customers> Customer Marketing Details

This button allows you to view current customers marketing details, from their distance living from the centre, their first contact with the centre, appointments, referrals, to all correspondence sent and also if they have any children. See the Membership manual for more details.



The screenshot shows a software window titled "Customer Marketing Details // Customer ID - 102921". At the top, there are input fields for "Customer Id: 102921", "Name: JOHNSON", "LISA", and "G: F". Below this is a navigation bar with tabs: "Info", "Marketing", "Other", "Extras", "Appointments", "Guest Pass", "Referral", "Tracking", and "Children".

The main content area is divided into two sections:


- Reason for joining this centre:** This section contains a "Reason:" dropdown menu with a "..." button and a "Clear" button. Below it are two dropdown menus: "Estimate distance living from Centre (km):" and "Direction living from Centre:".
- Other Centre:** This section contains two pairs of input fields. The first pair is "Membership Type:" and "Year:". The second pair is "Membership Type 1:" and "Year 1:".

At the bottom of the main content area, it says "Last Updated: 02 Aug 2012".

The bottom of the window features a toolbar with several buttons: "Customer Distance Graph", "Personal", "Save", "Delete", "Clear", "Clone", and "Close".

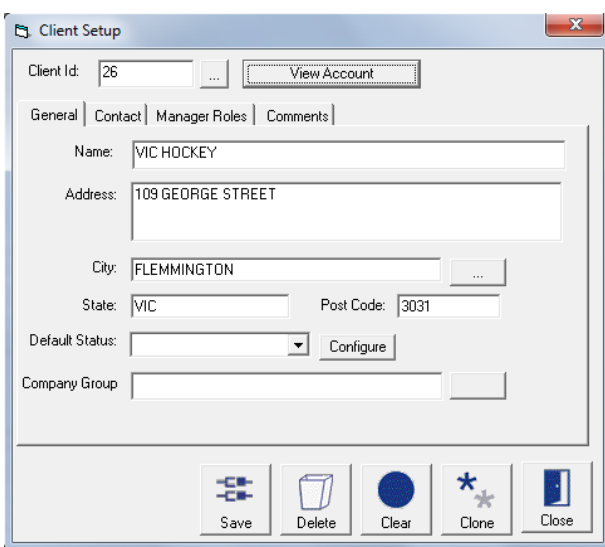
## Client set up

POS> Customers> Clients

Here you can create new Clients and a client Id will be automated. You can also view current Clients by using the search button . You can also View the Account from this page by selecting View Account. To create a new Client, open up the Client Setup screen and start adding their details. Once you start typing a client number will be allocated to the new client.

### General Tab

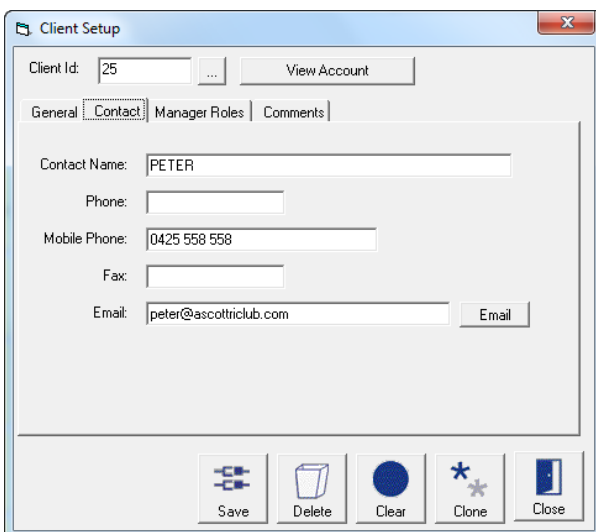
This is where the name, address, status and company group are selected.



The screenshot shows the 'Client Setup' window with the 'General' tab selected. The 'Client Id' field contains '26' and there is a 'View Account' button. The form fields are: Name: VIC HOCKEY, Address: 109 GEORGE STREET, City: FLEMMINGTON, State: VIC, Post Code: 3031, Default Status: (dropdown menu), and Company Group: (empty field). At the bottom, there are five buttons: Save, Delete, Clear, Clone, and Close.

### Contact Tab

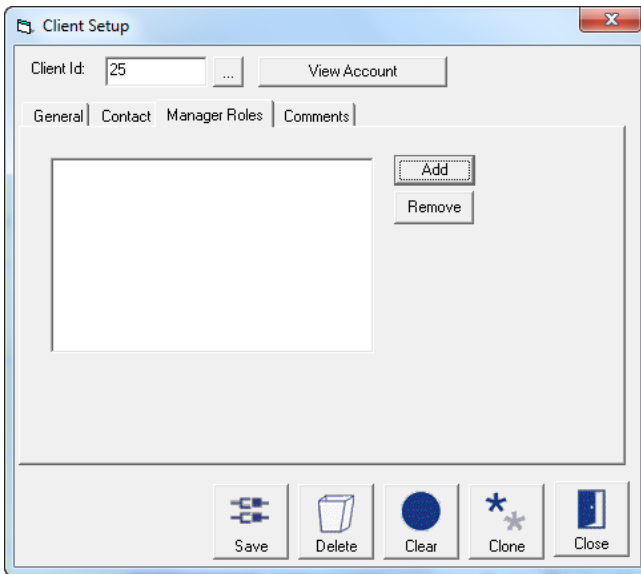
This is where you enter the contacts details for the company.



The screenshot shows the 'Client Setup' window with the 'Contact' tab selected. The 'Client Id' field contains '25' and there is a 'View Account' button. The form fields are: Contact Name: PETER, Phone: (empty field), Mobile Phone: 0425 558 558, Fax: (empty field), and Email: peter@scottriclub.com. There is an 'Email' button next to the email field. At the bottom, there are five buttons: Save, Delete, Clear, Clone, and Close.

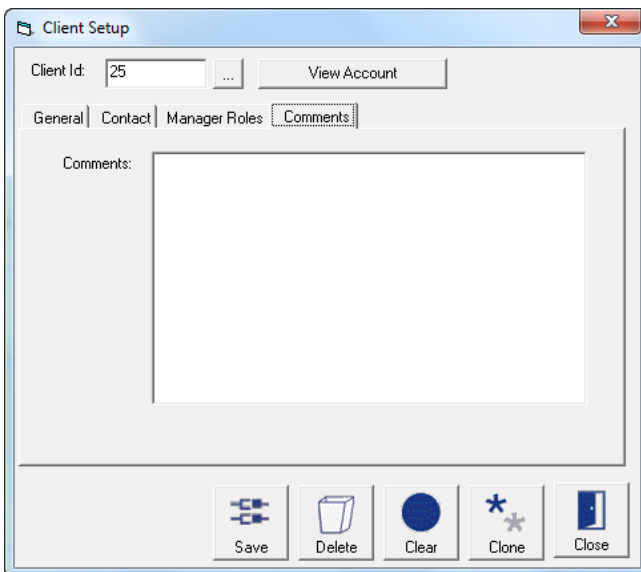
### Manager Roles Tab

This is where you can enter which team is responsible for this Client. This information flows through to reporting particularly for Facility booking reports.



### Comments Tab

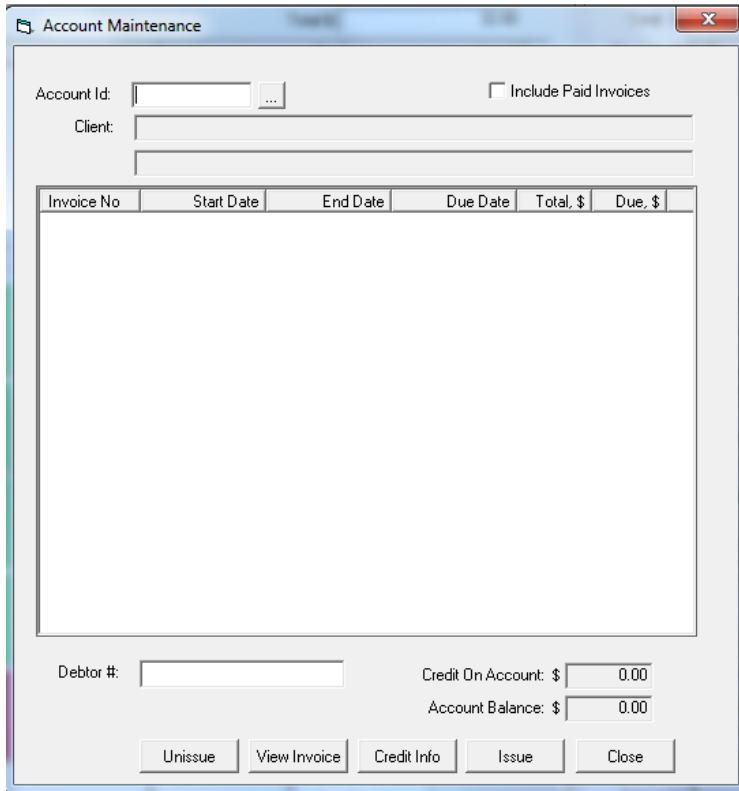
This is where you can enter any comments about this Client or Contact.




## Accounts

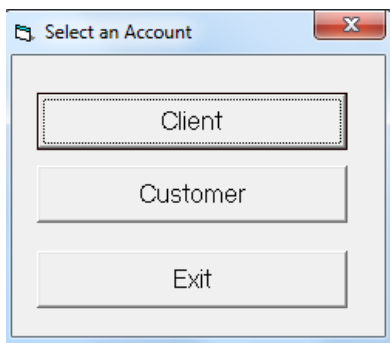
POS> Customers > Accounts

This is where you can view Client or Customer Accounts, from here you are able to view and create an invoice for an account.



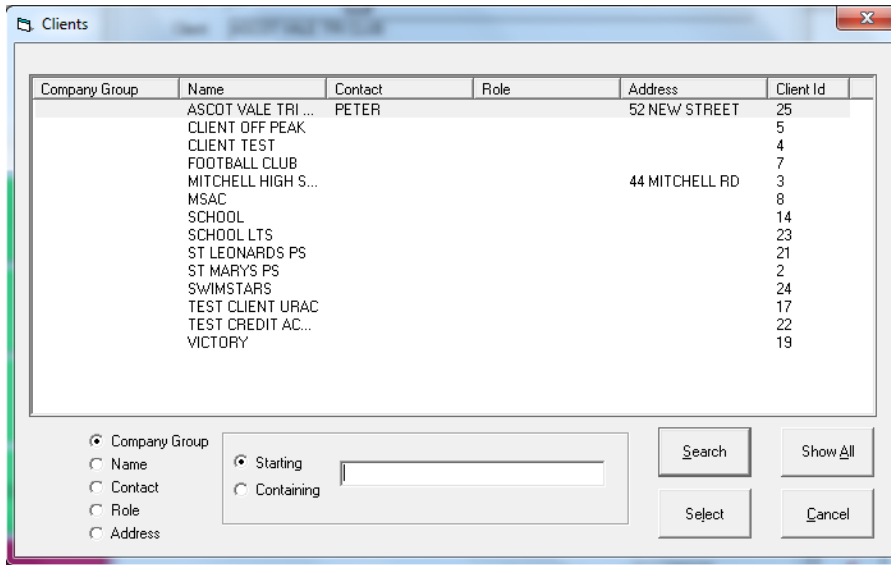
The screenshot shows the 'Account Maintenance' window. It features a search bar for 'Account Id' with a dropdown arrow, a 'Client' text field, and an 'Include Paid Invoices' checkbox. Below these is a table with columns: Invoice No, Start Date, End Date, Due Date, Total, \$, and Due, \$. At the bottom, there are fields for 'Debtor #', 'Credit On Account: \$ 0.00', and 'Account Balance: \$ 0.00'. Action buttons include 'Unissue', 'View Invoice', 'Credit Info', 'Issue', and 'Close'.

1. First you need to find the Customer or Client, enter the Account Id if know otherwise search for the client or customer by selecting 



The screenshot shows the 'Select an Account' dialog box. It contains three buttons: 'Client', 'Customer', and 'Exit'.

2. Select either Client or Customer.

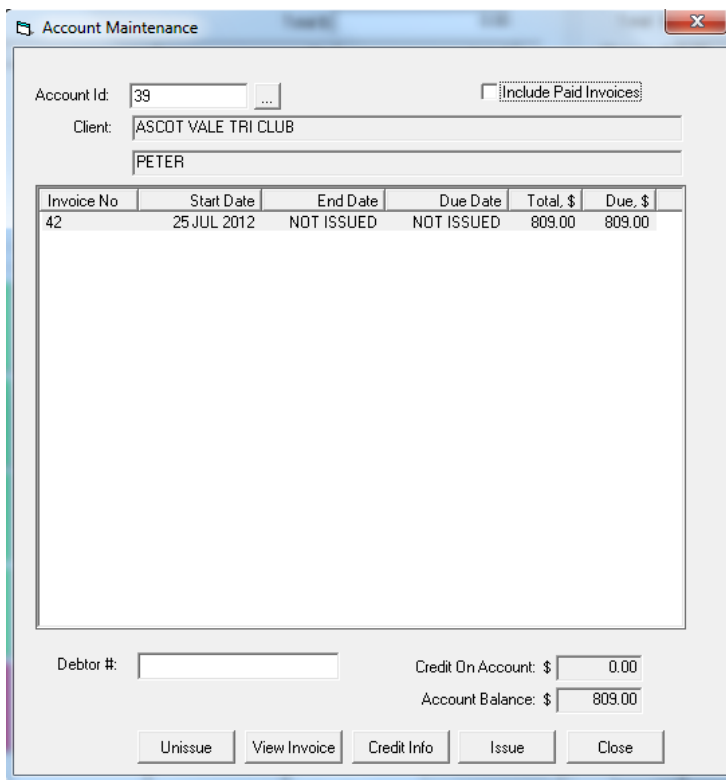


Company Group	Name	Contact	Role	Address	Client Id
	ASCOT VALE TRI ...	PETER		52 NEW STREET	25
	CLIENT OFF PEAK				5
	CLIENT TEST				4
	FOOTBALL CLUB				7
	MITCHELL HIGH S...			44 MITCHELL RD	3
	MSAC				8
	SCHOOL				14
	SCHOOL LTS				23
	ST LEONARDS PS				21
	ST MARYS PS				2
	SWIMSTARS				24
	TEST CLIENT URAC				17
	TEST CREDIT AC...				22
	VICTORY				19

Company Group  
 Name  
 Contact  
 Role  
 Address

Starting  
 Containing

3. To select a client double click on the client or select the client and click on the select button, any invoices for the selected client/customer will show.



Account Id:    Include Paid Invoices

Client:

Invoice No	Start Date	End Date	Due Date	Total, \$	Due, \$
42	25 JUL 2012	NOT ISSUED	NOT ISSUED	809.00	809.00

Debtor #:

Credit On Account: \$   
 Account Balance: \$

Include Paid Invoices

When ticked will show all invoices, including those that have already been paid for.

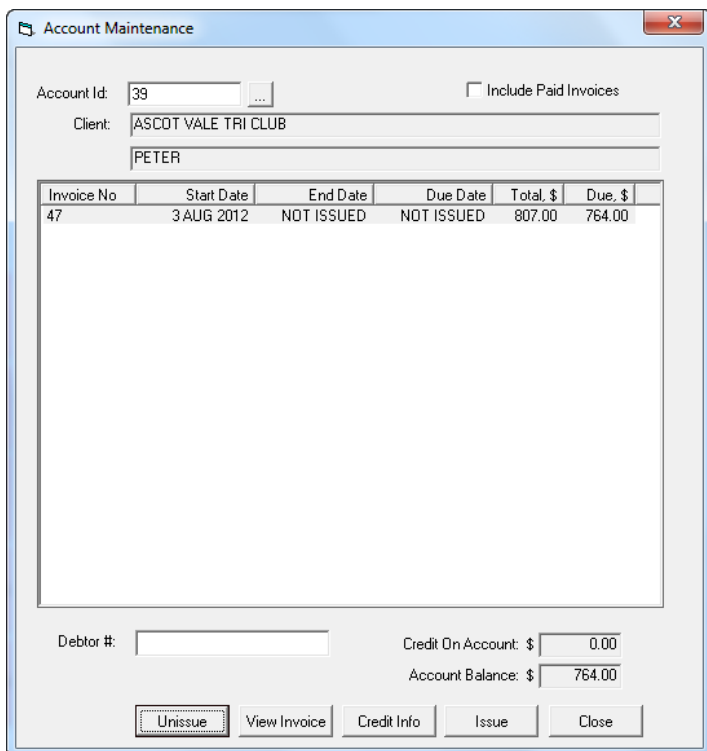
- Unissue Will unissue an issued invoice. See unissuing an invoice for further information.
- View Invoice Will detail the transaction component of an invoice including the transaction ID. See invoice maintenance.
- Credit Info Will display details of any payments have been made (credited) against the outstanding account. See viewing credit information for more information.
- Issue Will issue an invoice only if an invoice has not been issued previously. If an invoice has been printed previously then select View Invoice and Reprint.

### Issuing an Invoice

There are two options for issuing an Invoice; this can be done individually via the following or via Bulk Issue Invoices

Once a charge has been placed onto an account from a Facility booking you are now able to issue an invoice. To place a charge onto an account you need to selecting Invoice Account when making the booking, then once you have selected Book It and Pay or by marking the booking as attended if Book It was selected. There will now be a charge on the account waiting to be invoiced

- Go to POS> Customers > Accounts and find the customer or client you wish to issue the invoice for.

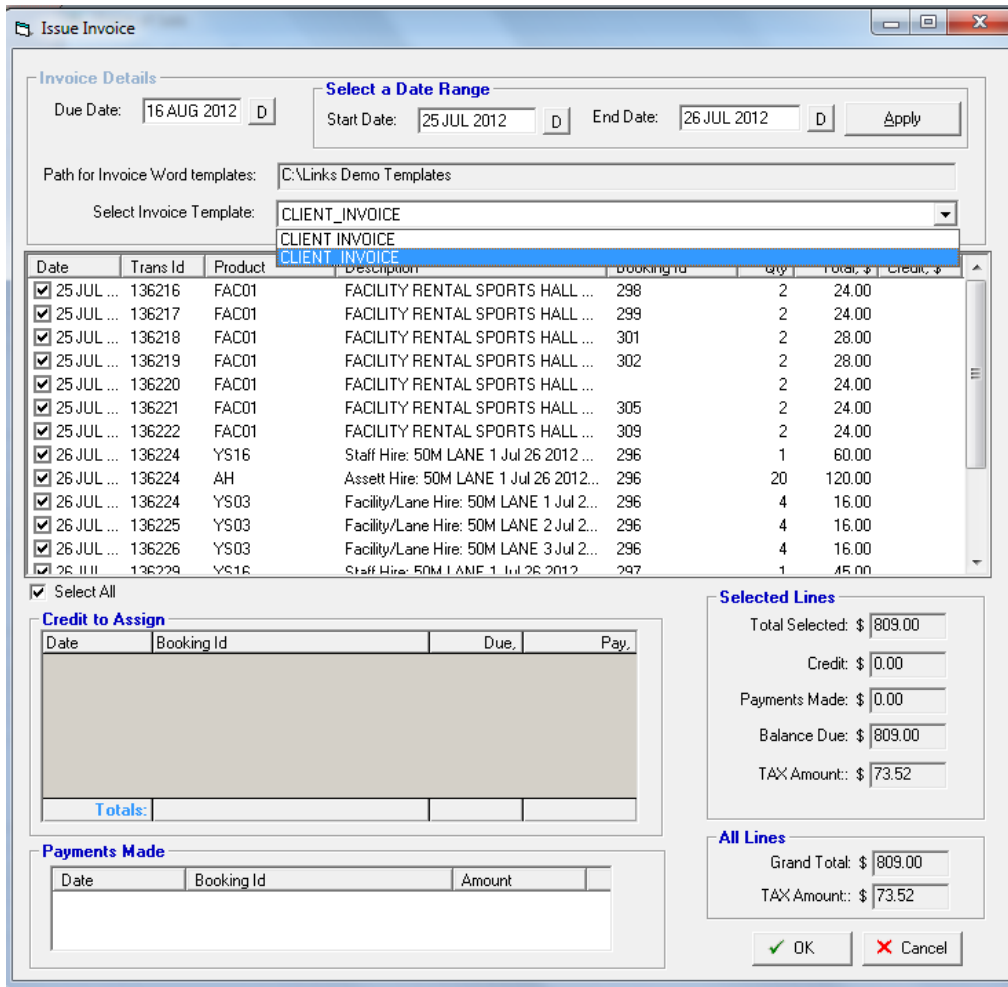


The screenshot shows a software window titled "Account Maintenance". It contains the following information:

- Account Id: 39
- Client: ASCOT VALE TRI CLUB
- Name: PETER
- Include Paid Invoices:
- Table of Invoice Data:
 

Invoice No	Start Date	End Date	Due Date	Total, \$	Due, \$
47	3 AUG 2012	NOT ISSUED	NOT ISSUED	807.00	764.00
- Debtor #: [Empty field]
- Credit On Account: \$ 0.00
- Account Balance: \$ 764.00
- Buttons: Unissue, View Invoice, Credit Info, Issue, Close

- Select the invoice you wish to issue and then select Issue.



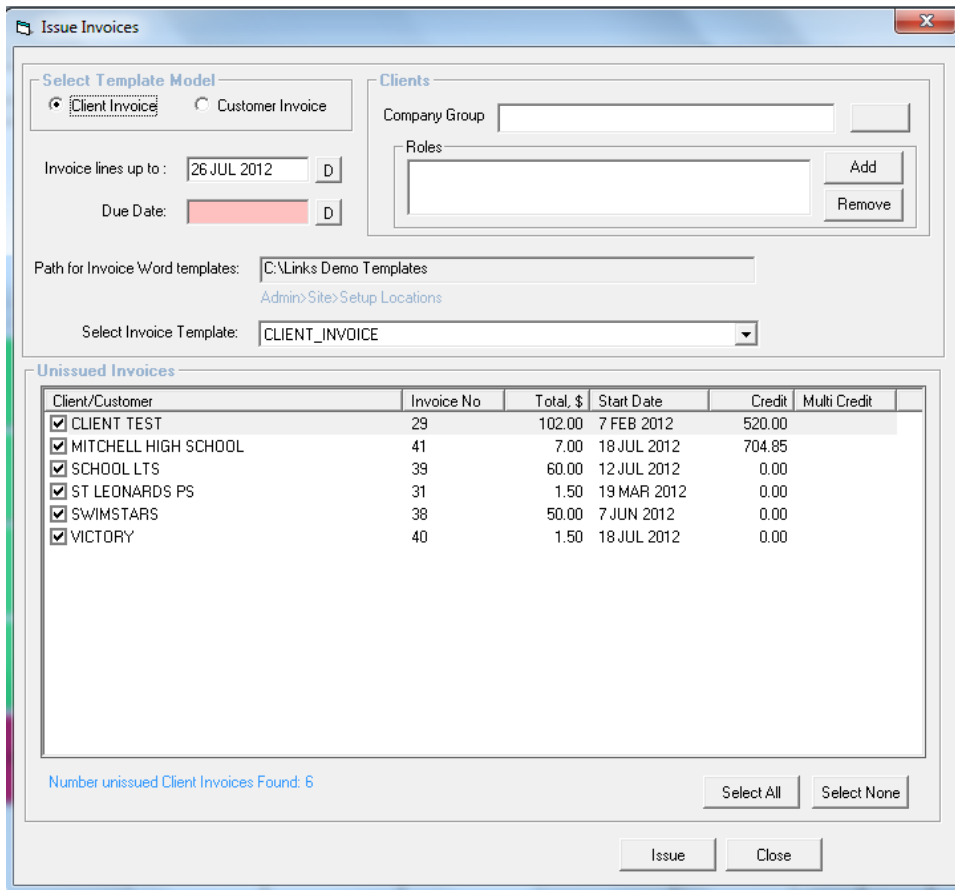
3. Enter the due date this is the date the payment is due, Short cut, Use the + key and the number of days till due date, this will work out the date due for you i.e. +21 for 21 days from now.
4. Enter the date range, this will default to include the dates that there has been a charge on the account that an invoice has not been issued for. If you have chosen a different date range select apply for these changes to occur.
5. Select an Invoice Template from the drop down box\*NOTE\* these need to be set up first via Admin module > POS > invoicing > templates.
6. Individually select the bookings you wish to invoice for by using the check boxes or tick  Select All
7. If a client has Credit that can be assigned it will show in the credit to assign box allowing you to allocate the credit, see applying credit to invoices.
8. Then select OK the invoice will have now been created in the word document for you and is now ready to print.

Note: Now that an invoice has been printed, the transaction cannot be made void.

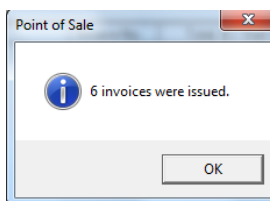
### Bulk Invoice Issue

POS > Customers > Bulk Issue Invoices

This is used to issue invoices to all Customers or Clients that have money owing on their accounts at the one time. These have to be produced separately.



1. Select the Template model, either Client or Customer.
2. Enter the date you wish to see unissued invoices up till, this is the Invoice line up to.
3. Enter the Due date for the payment.
4. Select the invoice template from the drop down box.
5. All Clients/Customers will have their check boxed ticked for you to issue an invoice, if you do not wish for a Client/Customer to be invoiced unselect there tick box.
6. Then select Issue.



7. Select OK, the invoices were generated in word for you to print and send off.
8. Repeat for Customer as well.

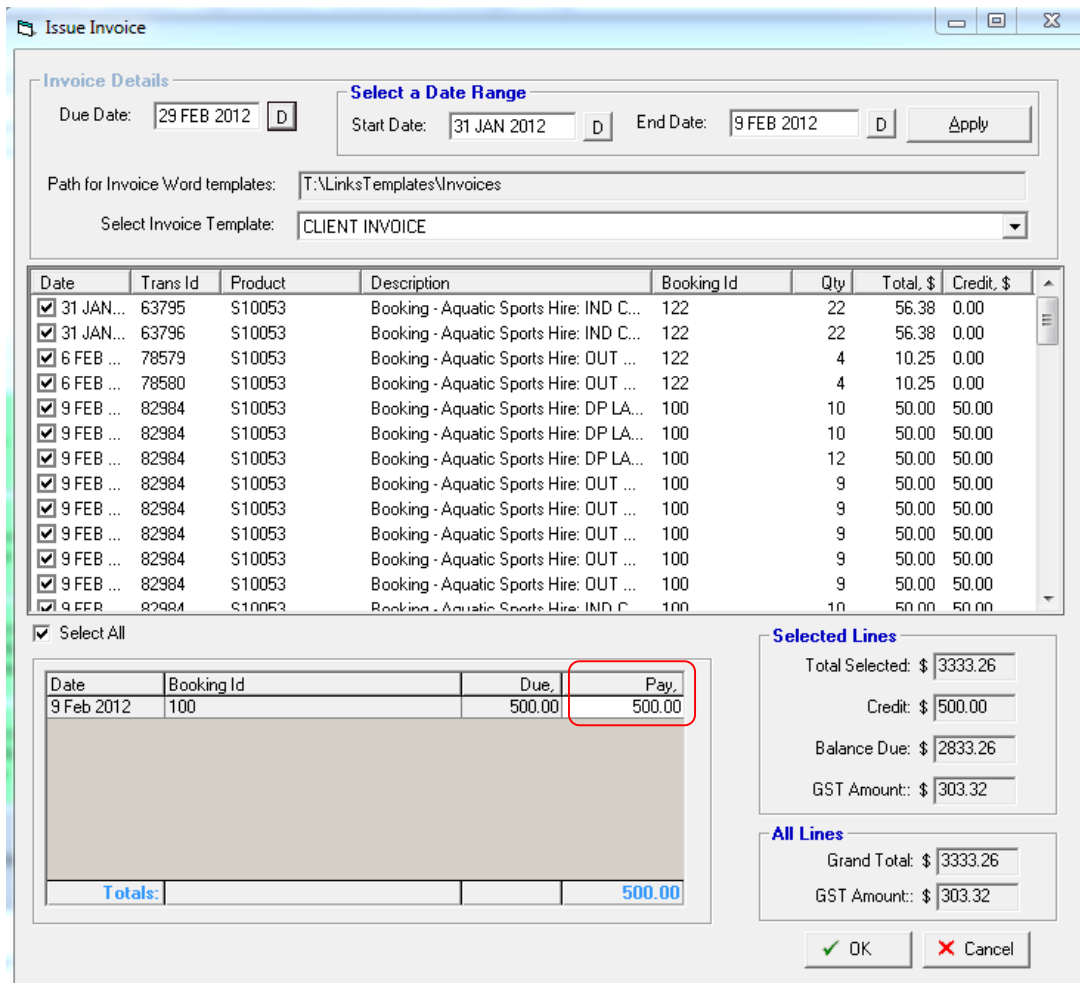


### Apply credit to invoices

If a Client or Customer has paid money (credit) against a master booking ID this money can then be used to pay off against booking lines for that booking ID.

This amount will be used primarily for that booking ID but if the amount in credit exceeds the amount owed it can be re-allocated to other bookings.

When issuing an invoice if there is credit on the account the following will show giving you the ability to use this credit for the invoice.



**Issue Invoice**

**Invoice Details**

Due Date: 29 FEB 2012 [D]      **Select a Date Range**  
 Start Date: 31 JAN 2012 [D]      End Date: 9 FEB 2012 [D]      [Apply]

Path for Invoice Word templates: T:\LinksTemplates\Invoices  
 Select Invoice Template: CLIENT INVOICE

Date	Trans Id	Product	Description	Booking Id	Qty	Total, \$	Credit, \$
31 JAN...	63795	S10053	Booking - Aquatic Sports Hire: IND C...	122	22	56.38	0.00
31 JAN...	63796	S10053	Booking - Aquatic Sports Hire: IND C...	122	22	56.38	0.00
6 FEB ...	78579	S10053	Booking - Aquatic Sports Hire: OUT ...	122	4	10.25	0.00
6 FEB ...	78580	S10053	Booking - Aquatic Sports Hire: OUT ...	122	4	10.25	0.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: DP LA...	100	10	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: DP LA...	100	10	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: DP LA...	100	12	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: OUT ...	100	9	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: OUT ...	100	9	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: OUT ...	100	9	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: OUT ...	100	9	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: OUT ...	100	9	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: OUT ...	100	9	50.00	50.00
9 FEB ...	82984	S10053	Booking - Aquatic Sports Hire: IND C...	100	10	50.00	50.00

Select All

Date	Booking Id	Due, \$	Pay, \$
9 Feb 2012	100	500.00	500.00
<b>Totals:</b>			<b>500.00</b>

**Selected Lines**

Total Selected: \$ 3333.26  
 Credit: \$ 500.00  
 Balance Due: \$ 2833.26  
 GST Amount: \$ 303.32

**All Lines**

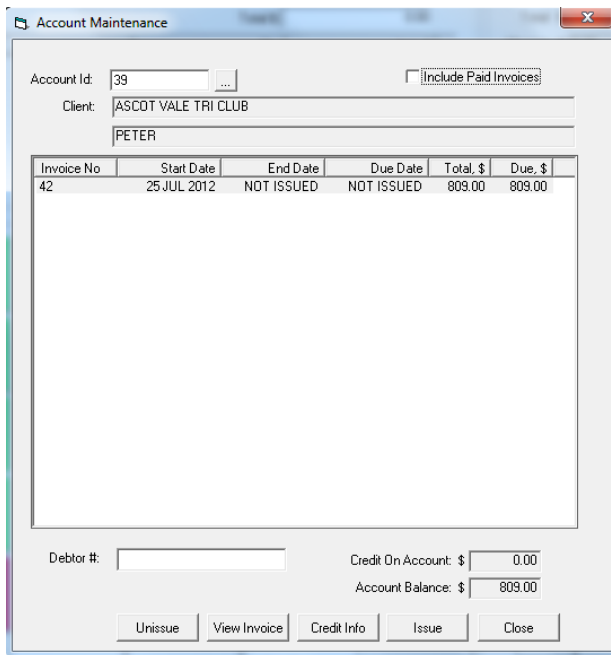
Grand Total: \$ 3333.26  
 GST Amount: \$ 303.32

[OK] [Cancel]

## Viewing Credit Information

The credit information screen will display the total credit added by the transaction, the booking it was applied to and the amount of credit remaining

1. Once on the Client/Customers account you are able to view the credit information.

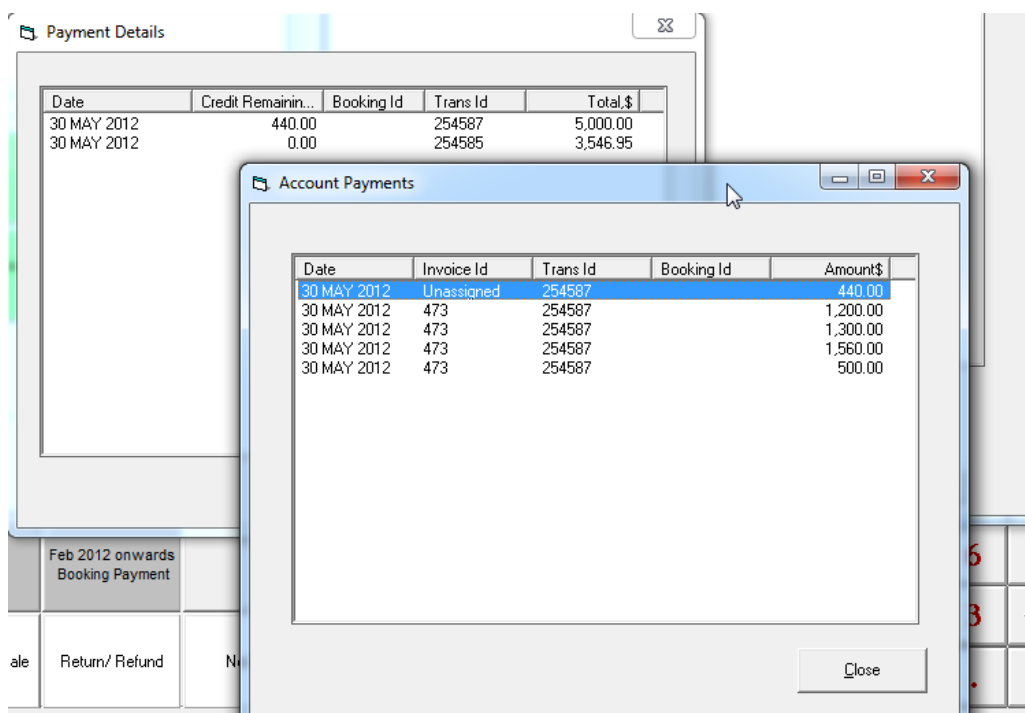


Account Maintenance window showing account details for ASCOT VALE TRI CLUB. The window includes fields for Account Id (39), Client (ASCOT VALE TRI CLUB), and Name (PETER). A table of invoices is displayed below:

Invoice No	Start Date	End Date	Due Date	Total, \$	Due, \$
42	25 JUL 2012	NOT ISSUED	NOT ISSUED	809.00	809.00

At the bottom, there are fields for Debtor #, Credit On Account (\$ 0.00), and Account Balance (\$ 809.00). Buttons for Unissue, View Invoice, Credit Info, Issue, and Close are visible.

2. To view this select the credit Info button on the accounts maintenance screen.
3. Double clicking on a credit line will display which invoices the credit was applied to.



Payment Details window showing a table of payments:

Date	Credit Remain...	Booking Id	Trans Id	Total, \$
30 MAY 2012	440.00		254587	5,000.00
30 MAY 2012	0.00		254585	3,546.95

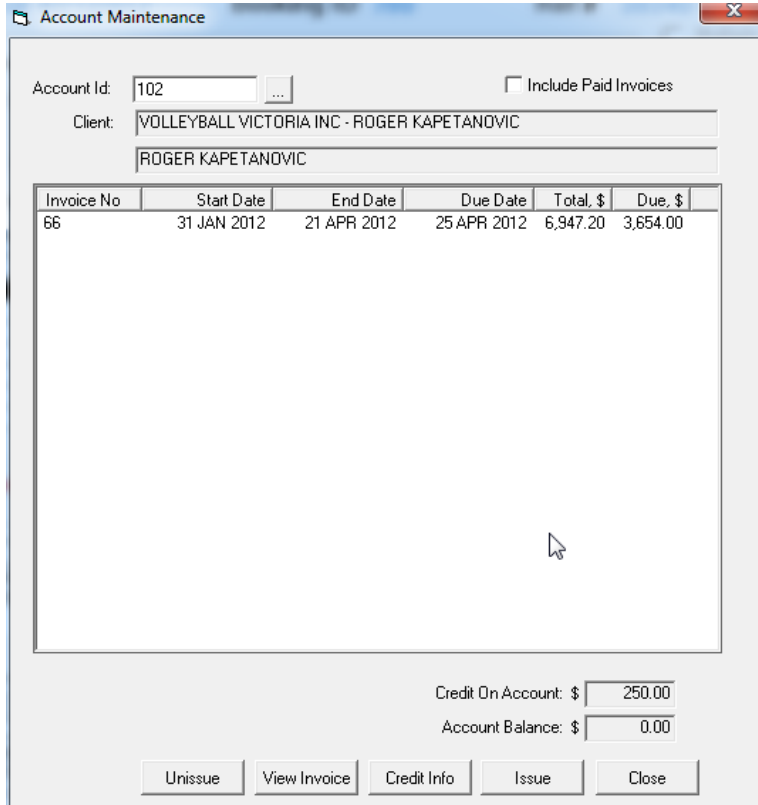
An Account Payments window is overlaid, showing a list of payments:

Date	Invoice Id	Trans Id	Booking Id	Amount \$
30 MAY 2012	Unassigned	254587		440.00
30 MAY 2012	473	254587		1,200.00
30 MAY 2012	473	254587		1,300.00
30 MAY 2012	473	254587		1,560.00
30 MAY 2012	473	254587		500.00

The Account Payments window has a Close button at the bottom right.

## Unissuing an Invoice

Users can now unissue an invoice in order to apply credit or include extra invoice lines. This is performed with the 'Unissue' button in the invoice screen.



Account Maintenance

Account Id: 102  Include Paid Invoices

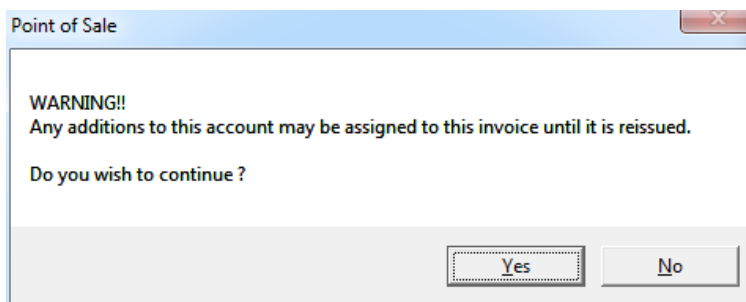
Client: VOLLEYBALL VICTORIA INC - ROGER KAPETANOVIC  
ROGER KAPETANOVIC

Invoice No	Start Date	End Date	Due Date	Total, \$	Due, \$
66	31 JAN 2012	21 APR 2012	25 APR 2012	6,947.20	3,654.00

Credit On Account: \$ 250.00  
Account Balance: \$ 0.00

Unissue View Invoice Credit Info Issue Close

The following message will display to warn users of the dangers of unissuing an invoice.



Point of Sale

**WARNING!!**  
Any additions to this account may be assigned to this invoice until it is reissued.

Do you wish to continue ?

Yes No

The invoice will become unissued.

## Invoices Maintenance

POS> Customers> Invoices

This will take you to an individual invoice number, this will show you detail of the booking for the invoice, the total amount, when the invoice is due, when it was printed as well as any payments made. You also have the ability to preview or reprint and invoice from here.

Invoice Number: <input type="text" value="46"/>	Start Date: <input type="text" value="1 AUG 2012"/>	Date Due: <input type="text" value="8 AUG 2012"/>
Account: <input type="text" value="39"/>	End Date: <input type="text" value="1 AUG 2012"/>	Printed On: <input type="text" value="3 AUG 2012"/>
Client: <input type="text" value="ASCOT VALE TRI CLUB"/>		

Date	Transaction Id	Product	Description	Booking Id	Qty	Total
1 AUG 2012	136237	YS03	Facility/Lane Hire: 50M LANE 1 Aug 1 2012...	296	4	16.00
1 AUG 2012	136238	YS03	Facility/Lane Hire: 50M LANE 2 Aug 1 2012...	296	4	16.00
1 AUG 2012	136239	YS03	Facility/Lane Hire: 50M LANE 3 Aug 1 2012...	296	4	16.00

<b>Payments Made</b>	
----------------------	--

<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Date</th> <th>Transaction Id</th> <th>Amount, \$</th> </tr> </thead> <tbody> <tr style="background-color: #e0f0ff;"> <td>3 AUG 2012</td> <td>136253</td> <td>16.00</td> </tr> <tr> <td>3 AUG 2012</td> <td>136253</td> <td>16.00</td> </tr> <tr> <td>3 AUG 2012</td> <td>136253</td> <td>16.00</td> </tr> </tbody> </table>	Date	Transaction Id	Amount, \$	3 AUG 2012	136253	16.00	3 AUG 2012	136253	16.00	3 AUG 2012	136253	16.00	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Grand Total: \$</td> <td style="width: 20%; border: 1px solid gray; text-align: right;">48.00</td> </tr> <tr> <td>TAX Amount: \$</td> <td style="border: 1px solid gray; text-align: right;">4.35</td> </tr> <tr> <td>Total Payments: \$</td> <td style="border: 1px solid gray; text-align: right;">48.00</td> </tr> <tr> <td>Balance Due: \$</td> <td style="border: 1px solid gray; text-align: right;">0.00</td> </tr> </table>	Grand Total: \$	48.00	TAX Amount: \$	4.35	Total Payments: \$	48.00	Balance Due: \$	0.00
Date	Transaction Id	Amount, \$																			
3 AUG 2012	136253	16.00																			
3 AUG 2012	136253	16.00																			
3 AUG 2012	136253	16.00																			
Grand Total: \$	48.00																				
TAX Amount: \$	4.35																				
Total Payments: \$	48.00																				
Balance Due: \$	0.00																				

## Messages

The Messages screens provide the ability to create messages for Customers regardless of their status within the system.

Generally there are two functions within messaging.

One is to create the message, whether it be a bulk message or a message to a particular Customer. Messages can be sent in two formats; internal messages that are activated when the customer's card is scanned at point of sale and e-mails which are sent to the customer's e-mail address. It is also possible to create and sent both forms of messages at the same time.

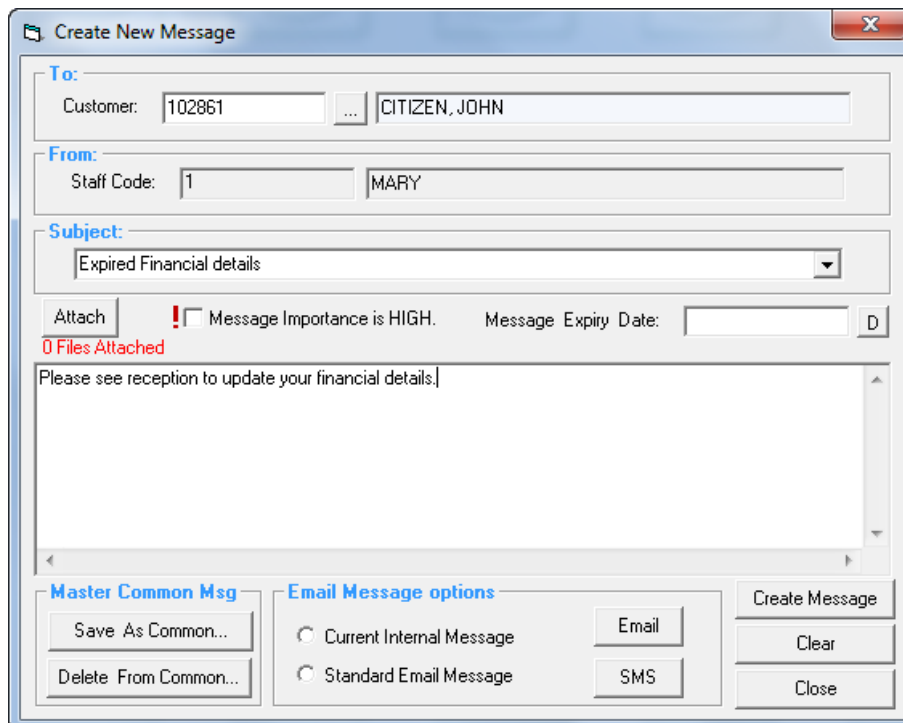
Second is to view the message. In the case of bulk messages it is possible to view historical messages whilst staff messages can only be viewed after logging in using individual staff ID and password.

To create the message there are three basic requirements

- The Customer ID (whether it be staff person or member)
- The subject
- The message itself

### Messages > Customer > New Message

POS > Messages > Customer > New Message



**Create New Message**

**To:**  
Customer: 102861 ... CITIZEN, JOHN

**From:**  
Staff Code: 1 MARY

**Subject:**  
Expired Financial details

Attach  Message Importance is HIGH. Message Expiry Date: [ ] D




0 Files Attached

Please see reception to update your financial details.

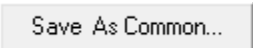
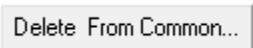
**Master Common Msg**  
Save As Common...  
Delete From Common...

**Email Message options**  
 Current Internal Message  
 Standard Email Message

Email  
SMS  
Create Message  
Clear  
Close

Customer	Use the  search button search for a customer or type in the customer number
Staff Code	The staff code and staff name will be displayed. This is derived from the staff member who is currently logged into Links
Subject	Using the  drop down button select from common subjects (inclusive of message) that have previously been saved. Alternatively type in a new subject description
Message Importance	Flag this box to designate that the message has a high importance. (Optional)
Message Expiry Date	Type in an expiry date for the message if required. (Optional)
Message Box	Type in the message
	Press this button to post the message

*Master Common Message*

	Press this button if you wish to save this subject description and corresponding message as a common message that can be recalled at a later date.
	Press this button if you delete the displayed common subject description and corresponding message from the common list

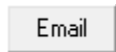
*Email Message Options*

Current Internal Message	Flag this option if the (internal) message created is also going to be e-mailed to the customer.
Standard Email Message	Flag this option if a different e-mail message is to be e-mailed to the customer whilst still posting the (internal) message

created. It will be possible to also select from a list of common or standard e-mail messages.

None

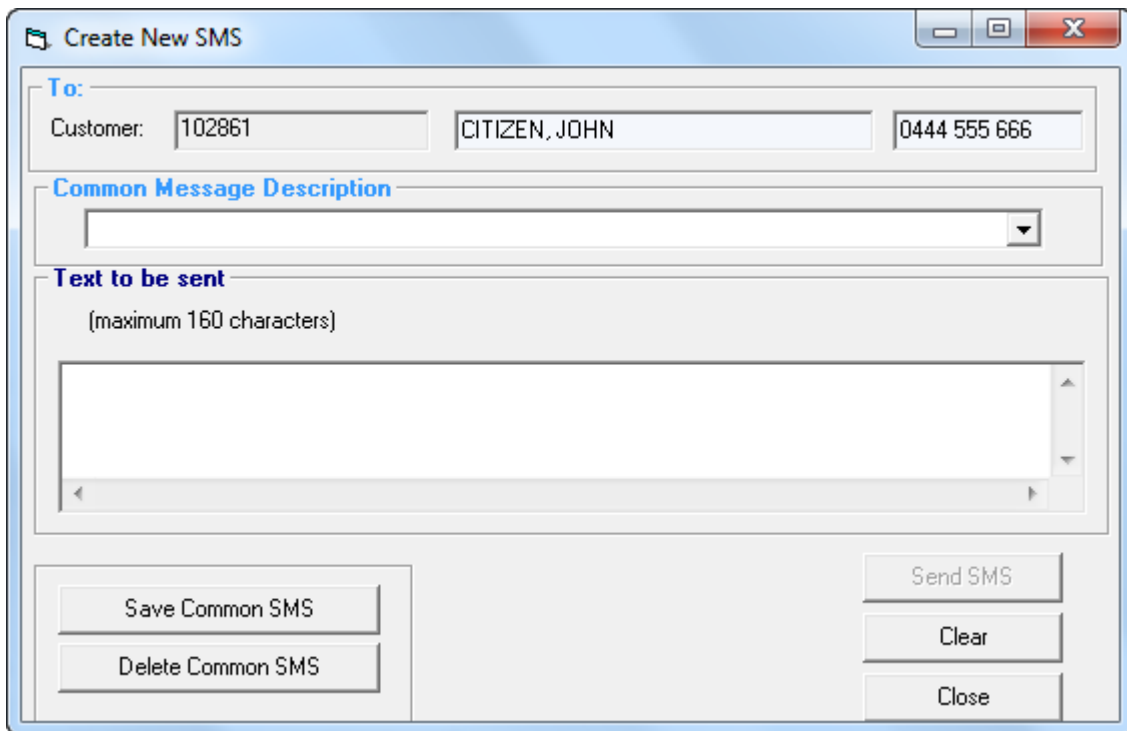
This is the default position when entering the message screen. Use this setting if you wish to create an e-mail using the customers e-mail address but the message is typed within Microsoft Outlook.



Press this button to generate the e-mails



Press this button to send an SMS to the specified customer. The following screen will open

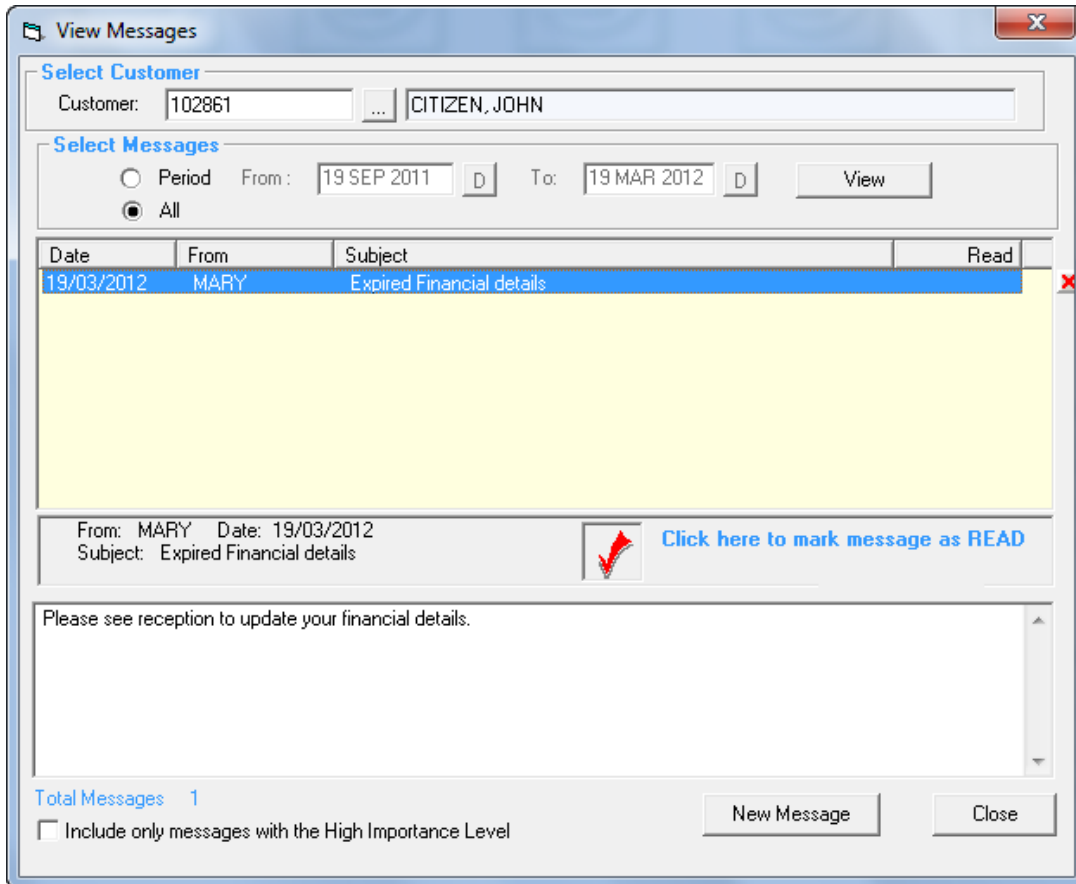



Note: The functionality of the Create New SMS screen mirrors that of the Create Internal Message screen.

**Messages > Customer > View Customer Message**

POS> Messages > Customer > View Customer Message

This screen enables you to view any customer messages that have been generated and the message details.



Customer                      Use the  search button search for a customer or type in the customer number

*Select Messages*

Period                              Enter in the From and To dates to select messages that were generated in a specific period

All                                      Select all messages generated

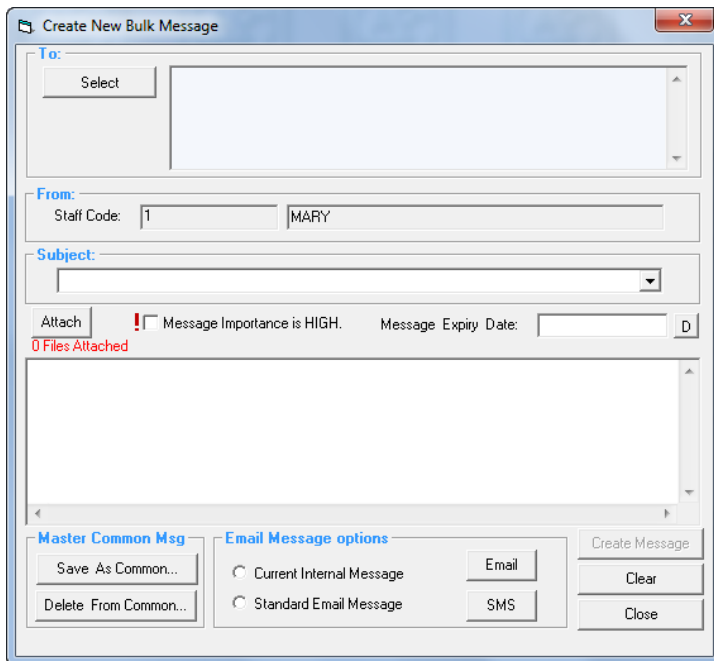
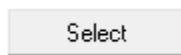
                              Press this button to select the messages based on the selection criteria



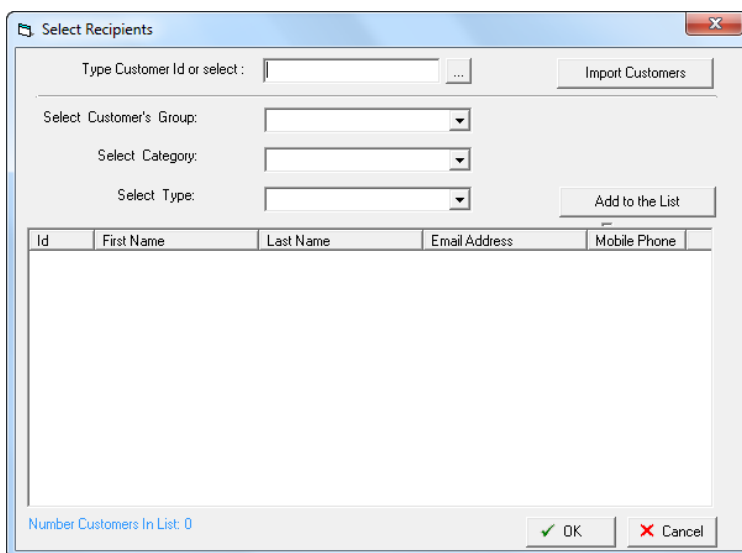
## Messages > Bulk > New Bulk Message

POS > Messages > Bulk > New Bulk Message


The New Bulk Message screen allows you to create and send a message to a large number of customers.

Press the Select button to open the following screen




Type Customer ID or  
select

Use the  search button search for a customer or type in the customer number. More than 1 customer can be selected


Import Customers

A list of customers can be imported from a .CSV file (Excel document). The Customer ID numbers must be in the first column of the Excel document.


Select Customer's Group

Using the  drop down button select from 3 main contract groups; Memberships, Visit Passes and Students

Select Category

If you have selected a customer group, it is possible to further narrow the selection through selecting by category. Using the  drop down button, select from the categories that relate to the chosen group

Select Type

If you have selected a category, it is possible to further narrow the selection through selecting by type. Using the  drop down button select from the types that relate to the category chosen

Add to the List

Press this button to select the customers that fulfill the selection criteria as stated above

 OK

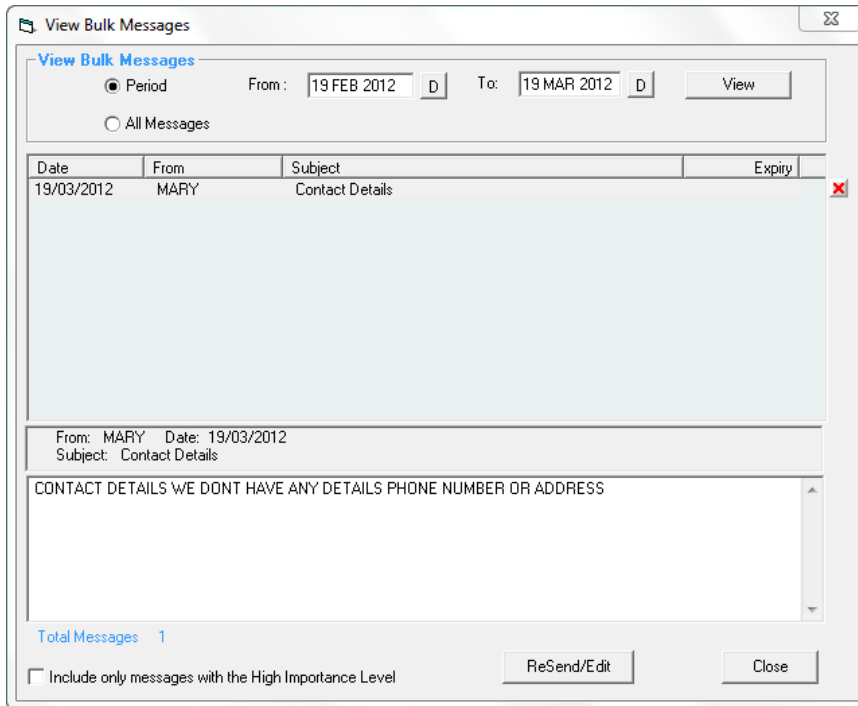
Once you have complied the list as required. Click OK to return to the Create Bulk Message Screen

The creation of the message and functions is the same as the Create Internal Message screen.

**Messages > Bulk > View Bulk Message**

POS> Messages > Bulk > View Bulk Message

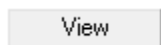
You can view any bulk messages that have been generated and the message details.



*Select Messages*

Period                      Enter in the From and To dates to select messages that were generated in a specific period

All                              Select all messages generated

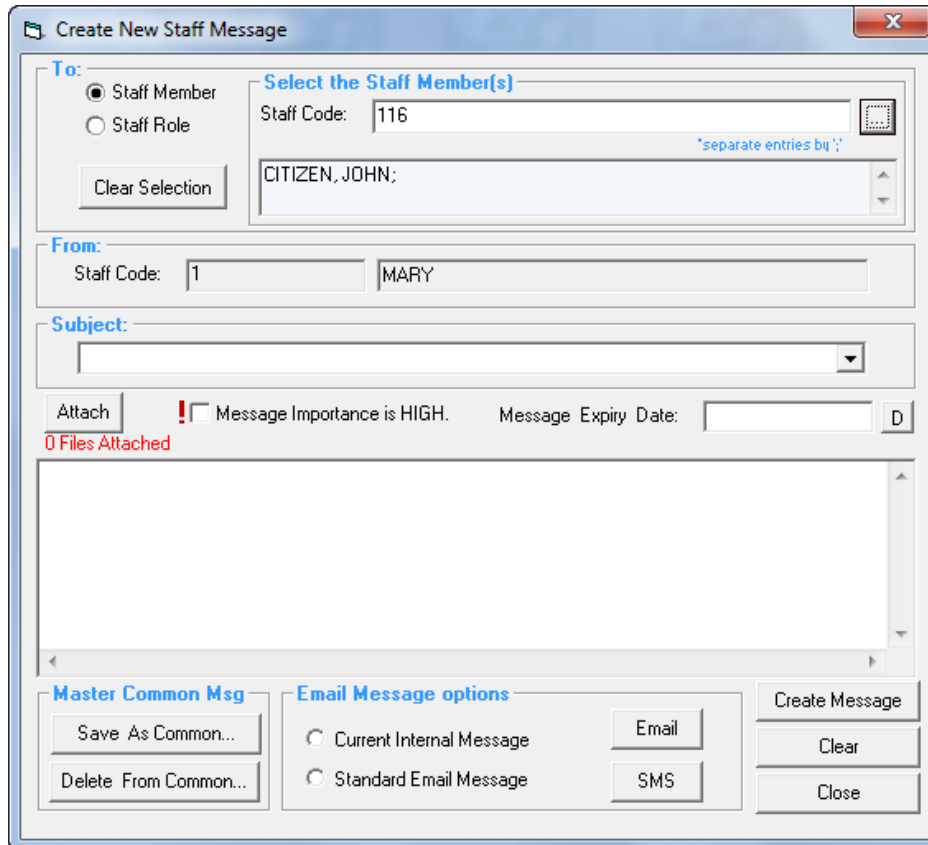


Press this button to select the messages based on the selection criteria


**Messages > Staff > New Staff Message**

POS> Messages > Staff > New Staff Message


Messages can be created and sent to staff members utilising either their Staff ID or by specific roles.

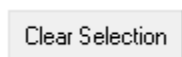


**Staff Member**

Use the  to search and select staff members. Alternatively, type in the staff ID and separate multiple ID's by the ; symbol

**Staff Role**

Use the  to search and select from a list of Staff Roles. Any staff member that is allocated to this role will receive the message



Press this button to clear the selection and recommence the selection process

**Staff Code**

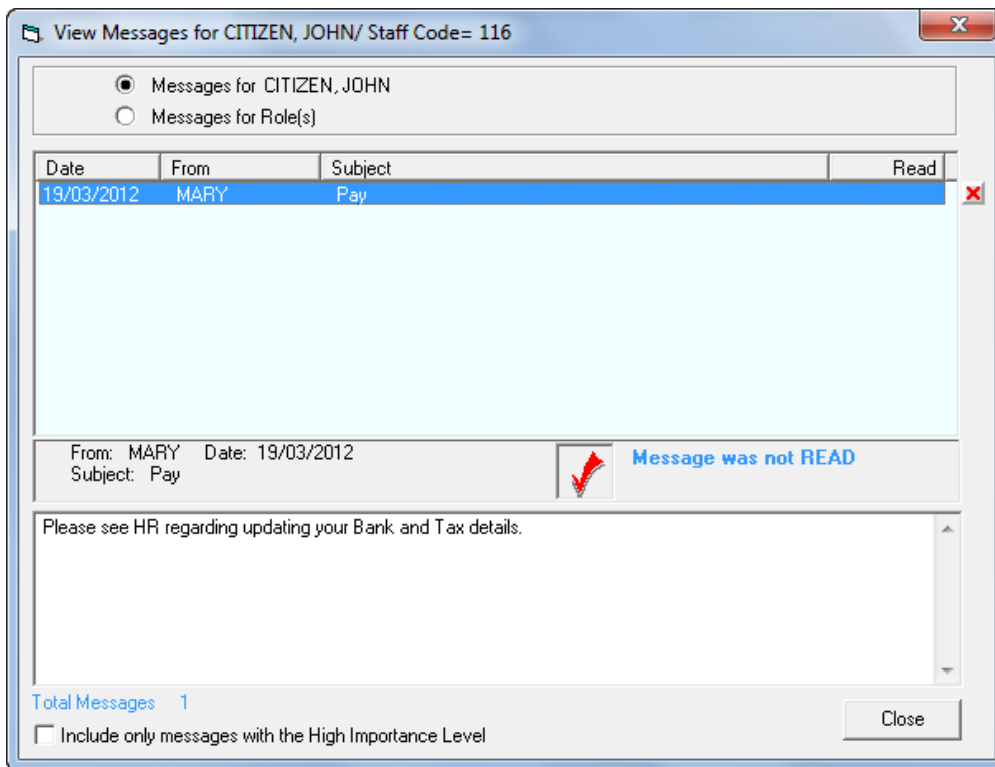
The staff code and staff name will be displayed. This is derived from the staff member who is currently logged into Links

The creation of the message and functions is the same as the Create Internal Message screen.

**Messages > Staff > View Staff Messages**

POS> Messages > Staff > View Staff Messages

Before gaining access to this screen all staff members must log in using their Staff ID and Password

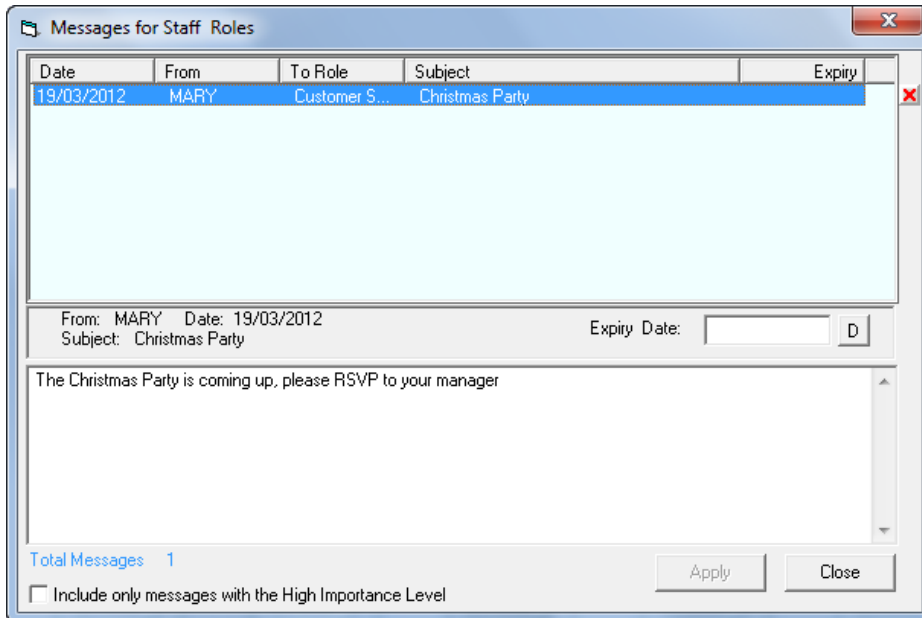


This screen enables you to view designated staff messages that have been generated. It is also possible to view any message designated to the staff member's Role

## Messages > Staff > View Messages for Roles

POS> Messages > Staff > View Messages for Roles

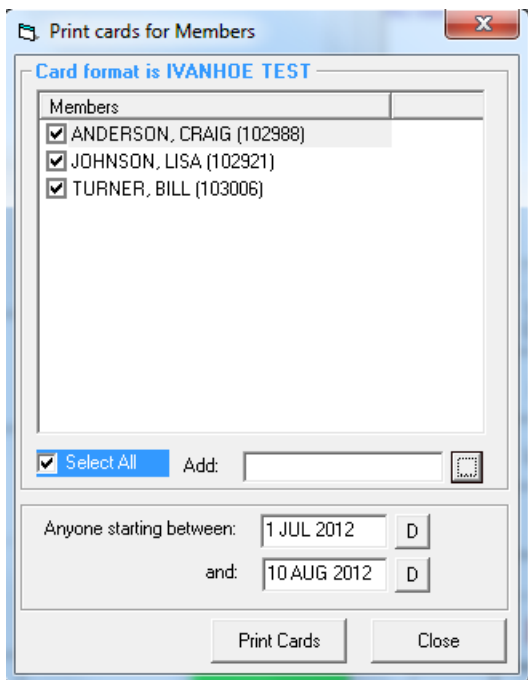
Much like the View Staff Messages screen, this screen displays all messages that have been created and sent to Staff Role.



## Bulk Card Print for Members/Students and VP holders

POS> Customers> Bulk Print Members Cards- Visit Passes – Student Cards

The same process is used for all three. You will have to follow the following instructions for all three types individually. Note this process is not for pre printed membership cards.



1. Enter the dates you would like to print the cards for; any members/students/VP that have joined in that date range but do not have a card issued will appear.
2. You can choose to delete anyone you do not wish to have a card printed for by removing the tick next to their name; if you need to print a card of a member that isn't on the list then you can add them to the list by selecting the search button and adding them.
3. Once you are happy with the list select Print Cards.

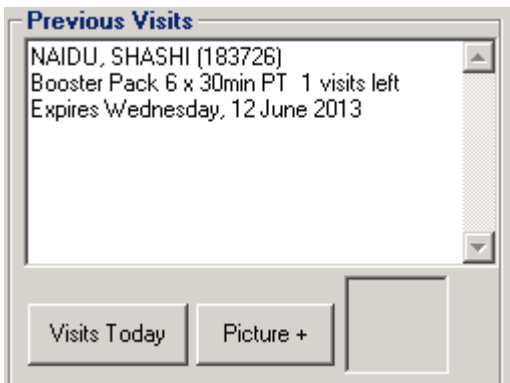
## Access Troubleshooting

When a member is stopped at an access point such as turnstile, there is most probably a valid reason.

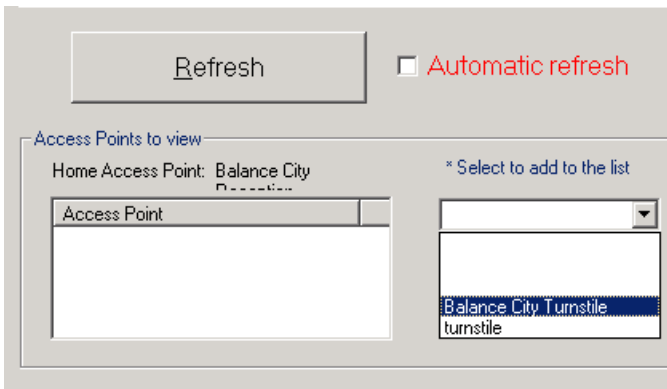
### RFID Access Troubleshooting

The following is a basic troubleshooting guide to assess the reasons a membership may have 'access denied' when attempting to use centre access points. To access the previous visits area of POS to identify reasons for denial of entry, complete the following;

1. Double click the white area of the previous visits section of POS



2. Add the Turnstile/Gate to the visits list



3. Highlight the failed entry in red, check the errors log on right of the screen





## Error Messages

### RFID:

Message	Member has had a message placed on their account. <i>Ensure to click the 'ALL' button when viewing customer messages.</i>
Could not find a valid reason for visit	Member may have been created, and card allocated, however there is no current membership contract attached to member. The member could also have a 'future' contract, access will be denied until the contract commences. The member may also have an expired contract, or is actively on suspension.
There is no current contract	Member may have been created, and card allocated, however there is no current membership contract attached to member. The member could also have a 'future' contract, access will be denied until the contract commences. The member may also have an expired contract, or is actively on suspension.
No reason found for entrance	Member may have been created, and card allocated, however there is no current membership contract attached to member. The member could also have a 'future' contract, access will be denied until the contract commences. The member may also have an expired contract, or is actively on suspension.
Entry Point not A central entrance point	Patron bypassed central turnstile entrance point. All patrons must enter via turnstile or gate, in order to gain access to further facilities.
Entry is not permitted at this Location	Member is attempting to use an access point that their contract does not allow.
The customer has amount \$xx.xx overdue for the Membership Contract(s)	Member currently owes money against their contract <i>Reasons:</i> <i>-Incorrect pro-rata adjustment at Contract commencement</i> <i>-Debit Rejection</i>
Double Swipe within xx seconds.	Patron has swiped their RFID band at multiple access points within a defined time period. This parameter can be edited in <i>Admin &gt; Site &gt; New Access Parameters.</i>



Unknown card or person 00XX0XX0

Member has an RFID band that has not been allocated to a Customer ID

Visit Pass has no remaining visits

Member has used all available visits on current visit pass

Member Visit Out of hours

Member has off peak membership and is attempting to visit outside membership hours

### *Barcode*

Bad read

Patron is attempting to scan a 'single visit' barcode that is physically damaged and cannot be read by a scanner.

Unknown card or person 00XX0XX0

Patron has purchased a 'single visit' and is attempting to use the barcode multiple times at an entrance point.