



## **Links Modular Solutions Version 9.4.0 Full Release Notes**

Prepared by: Andrew Preston – QA Officer

May 2012

## Contents

Links Modular Solutions Version 9.4.0 Full Release Notes .....	1
Overview .....	4
Password Changes .....	5
Access Point changes .....	6
To setup an access point.....	6
To assign an access point to a computer .....	6
To assign an access point to a POS computer.....	6
admin.link Changes .....	7
PA-DSS & PCI Changes .....	7
Secure Method.....	7
Encrypted Cards with LinksPay or Self Direct Debit.....	7
Standard Security Changes .....	8
Password Requirements .....	9
Auditing Changes .....	11
Direct Debit Reversals.....	11
SMTP Changes.....	12
Menu Changes .....	12
Invoice Changes .....	14
Family Credits to be used for Memberships & Visit Passes.....	15
Family credit increase reasons table .....	15
Maximum Debit Changes.....	16
class.link changes.....	17
Trial Classes.....	17
Admin Setup.....	17
Setting up a class type for trial bookings .....	17
Making a trial booking .....	19
New Trial Booking screen.....	23
Converting a trial booking.....	24
Cancelling a trial booking.....	25
Reporting of trial bookings .....	28
Held Bookings .....	32



Search for a Family by last 4 of Credit Card .....	32
Switches for Suspensions/Makeups & Trials/Helds.....	33
classweb.link .....	36
Setting up registration fees.....	36
facility.link .....	37
Co Relationship Facilities .....	37
Bulk Facility Price Update .....	40
Bulk Facility Override Price Update .....	41
consult.link Overview.....	42
e-blast.link overview .....	43
Techno Gym Interface.....	44
kiosk.link Overview .....	45
memweb.link .....	46
pos.link.....	47
Customer Screen enhancements.....	47
New Linksprint option.....	48



## Overview

This version of Links Modular Solutions includes some major changes to the security abilities of the Links application. It is important if you are considering PCI compliance that you take careful note of the security section of this document. Version 9 also includes a large number of changes particularly for new web modules. The new suite of web modules allows you to decrease your staffing requirements all whilst increasing your revenue.



## Password Changes

Version 9 with its increased security has called for some changes to the password policies. These are detailed further in the PA-DSS/PCI section of the release notes.

**Any sites using ALPHA characters in their passwords will be affected by the change.**

Passwords are now case sensitive, so if previously your password was using ALPHA characters you will need to turn on caps lock on your first login to Links after upgrading. You will then need to change your password so that Links can trap the case sensitive password. **Please note if your password was not intricate i.e. your name when you change it,** make sure that Caps Lock is OFF.

To change your password the Administrator will need to be logged in and then you can access Admin>SecurityMenu>StaffMembers to change your password.

Example your StaffID is 102 and password is 'toby'

When you login to Links for the first time after upgrading to Version 9 you would do the following

1. Turn on Caps Lock
2. Enter staff code as normal i.e. 102
3. Type in 'toby' so it types in as 'TOBY'
4. You will now need to get an administrator to change your password
5. When changing your password if you want the password to remain as 'toby' then ensure that CAPS LOCK IS OFF

**ONCE YOU HAVE USED PASSWORD SECURITY AT A HIGHER SETTING DO NOT CHANGE IT BACK TO A WEAKER SETTING AS YOUR NEW PASSWORDS WILL THEN NOT WORK.**

## Access Point changes

In past versions of Links we have made stipulations that an access point must be setup on all machines that process visitations. To this point this has been a highly recommended procedure rather than a requirement. As of Version 9 an access point must be setup on all machines to be able to process visitations.

## To setup an access point

1. Go to Admin>SiteMenu>OtherSiteParameters/SetupLocations
2. Click on the Access Points tab
3. Add access points i.e. Reception, Admin or simply just your site name

## To assign an access point to a computer

Access points are a local setting and therefore must be setup on all machines separately.

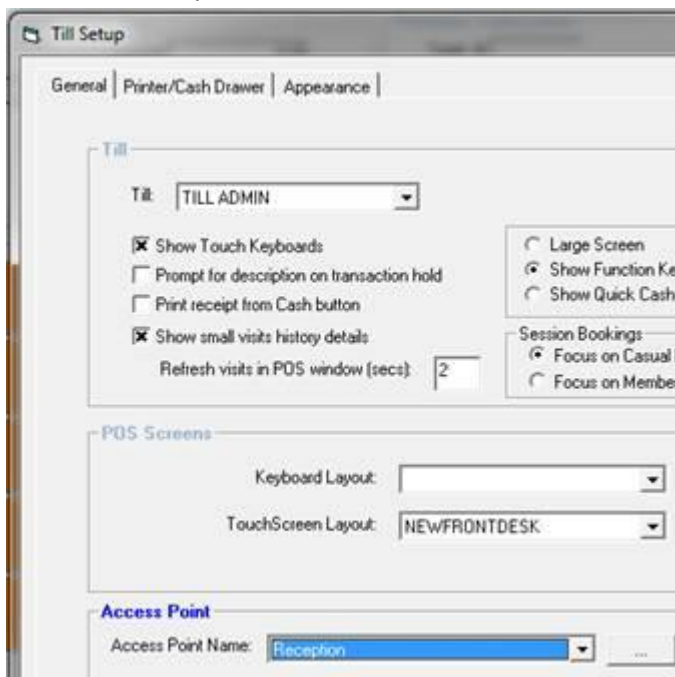
1. Go to Admin>SetupPC>SetupForPC
2. From the drop down select an access point
3. Click on OK

There is further information about access points in the Administration Manual for Links Modular Solutions

## To assign an access point to a POS computer

On each computer that will record attendance you will need to set an access point. This can be done via

POS > Till > Setup > Access Points





## admin.link Changes

### PA-DSS & PCI Changes

In response to the growing number of data security breaches, the major payment card brands of VISA, MasterCard, Discover, American Express and JCB have come together to form the Payment Card Industry Security Standards Council (PCI SSC), an independent body formed to manage the ongoing development, enhancement, storage, dissemination and implementation of security standards for account data protection.

Since its establishment the Council has developed a set of security requirements for all businesses that handle payment cards, including individual merchants, as well as software developers and manufacturers of applications used for payment card transactions.

Two of the major standards developed are the Payment Card Industry Data Security Standard (PCI DSS) for card merchants and processors, and the Payment Application Data Security Standard (PA-DSS), for software developers and integrators.

Links has developed a secure framework for the database to operate within that negates the need for PA-DSS compliance and allows for end users to gain PCI compliance within their business.

### Secure Method

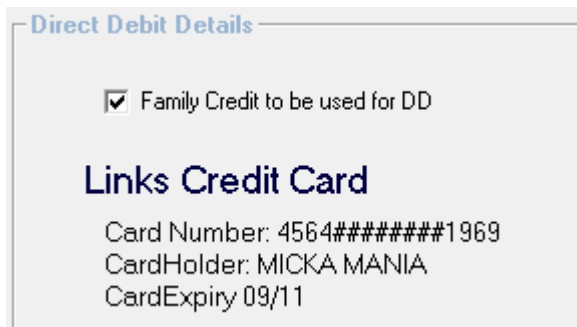
Links can now cater for no credit cards to be kept within the Links database. All credit cards are held offsite in a secure credit card vault. A reference to the card is held within the Links database as well as the first four and last four digits of the card to assist customer service. If you are interested in achieving the most secure database available, please contact LinksPay on 07 3040 4320. If you are already using LinksPay the Links support team can assist you to upgrade to the most secure version.

### Encrypted Cards with LinksPay or Self Direct Debit

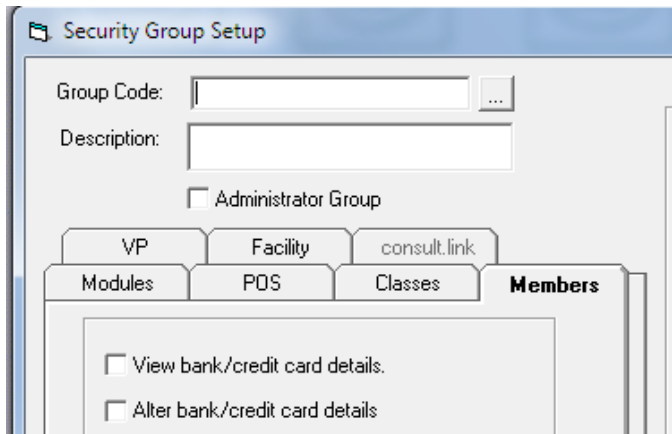
Links still has the ability to manage cards within the database in an encrypted manner. Whilst not as secure as vaulted cards, Credit Cards and Bank details are encrypted within the database. If you are using LinksPay with Encrypted cards this is more secure than self direct debiting. When you are using Self Direct debiting the card and bank details are available in unencrypted format through the direct debit process. If you would like further information on the options available please contact Links on 03 9938 4567.

### Standard Security Changes

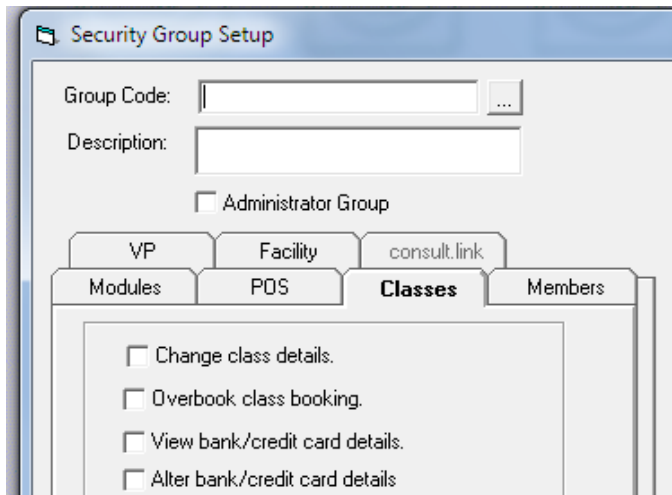
Included with Version 9 are some standard security changes. All credit card screens now only display the first and last four card digits regardless of which direct debit method is being used. To access the direct debit details a button is now available for a pop up screen in Families, and the same process is used in Members. An example of how it is now displayed in classes is below



There is also new security parameters that cater for allowing staff to either not view, view only or edit credit card and bank details. To change these parameters for your staff you will need to adjust the security groups in Admin>Security>SecurityGroups







### Password Requirements

Whilst you can continue to use the standard passwords in Links, you may now also choose to increase the security of your database. This includes;

1. Strong Passwords
  - a. Minimum of 7 characters
  - b. Combination of Capitals, Lower Case, Numbers & Special Characters
  - c. Example M!ch@3l@
2. Number of Invalid Attempts
  - a. You can restrict users to how many attempts they get to enter a password incorrectly before they are locked out
3. Expiry of Password
  - a. Now you may also choose to for users passwords to expire after a set number of days.

All of these parameters may be set in Admin>Security>System Security

**System Security**

The Payment Application Data Security Standard (PA-DSS), is the global security standard created by the Payment Card Industry Security Standards Council (PCI SSC). The PCI Security Standards Council is an open global forum for the ongoing development, enhancement, storage, dissemination and implementation of security standards for account data protection. As part of PCI compliance, PA-DSS dictates that software vendors develop payment applications that are compliant with the Payment Card Industry Data Security Standards (PCI DSS). LinksPay has a high level of PCI Compliance, and using the highest security available in Links Modular Solutions, your business would be in a good position to gain PCI compliance. By using the most secure methods available in Links, such as the Credit Card vault and strong passwords, you will be allowing your database to be as secure as possible.

**Password Policy**      Credit Card and Bank Account Security      Auditing

**Password Policy**

PCI compliance is about security and the ability to keep unauthorised people away from sensitive data, therefore an effective Password Policy is crucial.

**Weak Passwords**      Unlimited number of attempts to guess password  
 Never have to change password.

0%      Alter password policy for LOCATION2

**Password Policy**

**Staff Passwords**

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

PCI compliance requires that strong passwords must be used for all users and that a rigorous password policy is enforced.

**Strong Passwords:**

No. Invalid Attempts:       \* between 1 and five recommended for PCI

Days to change password:       \* less than 31 recommended for PCI

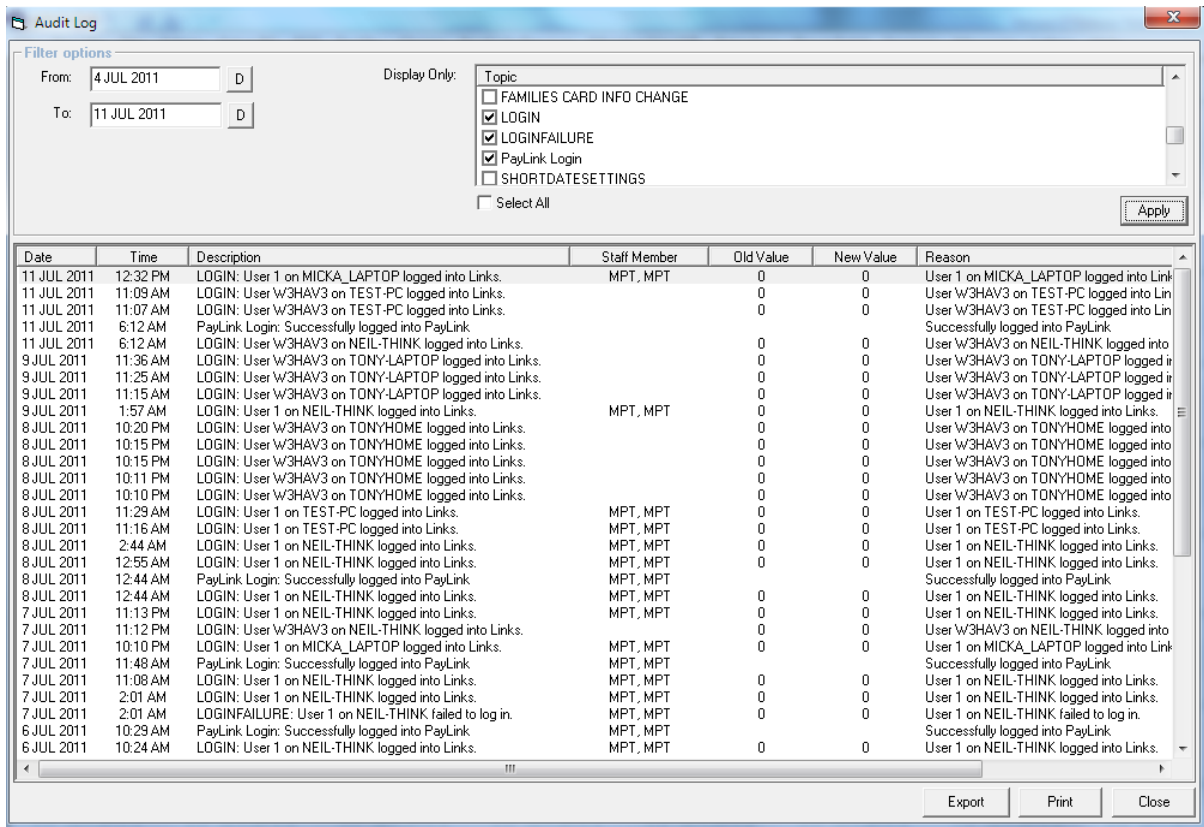
OK      Cancel

## Auditing Changes

Links now audits a larger range of functions including;

- Logins
- Failed Logins
- Backups
- Upgrades
- Access of Credit Card & Bank Information
- Changes of staff between security groups
- Additions to security groups
- Tracks the machine name that changes were made from

If changes have occurred they are available for viewing in the Audit Log, Admin>Site>AuditLog



Date	Time	Description	Staff Member	Old Value	New Value	Reason
11 JUL 2011	12:32 PM	LOGIN: User 1 on MICKA_LAPTOP logged into Links.	MPT, MPT	0	0	User 1 on MICKA_LAPTOP logged into Link
11 JUL 2011	11:09 AM	LOGIN: User W3HAV3 on TEST-PC logged into Links.		0	0	User W3HAV3 on TEST-PC logged into Lin
11 JUL 2011	11:07 AM	LOGIN: User W3HAV3 on TEST-PC logged into Links.		0	0	User W3HAV3 on TEST-PC logged into Lin
11 JUL 2011	6:12 AM	PayLink Login: Successfully logged into PayLink				Successfully logged into PayLink
11 JUL 2011	6:12 AM	LOGIN: User W3HAV3 on NEIL-THINK logged into Links.		0	0	User W3HAV3 on NEIL-THINK logged into
9 JUL 2011	11:36 AM	LOGIN: User W3HAV3 on TONY-LAPTOP logged into Links.		0	0	User W3HAV3 on TONY-LAPTOP logged in
9 JUL 2011	11:25 AM	LOGIN: User W3HAV3 on TONY-LAPTOP logged into Links.		0	0	User W3HAV3 on TONY-LAPTOP logged in
9 JUL 2011	11:15 AM	LOGIN: User W3HAV3 on TONY-LAPTOP logged into Links.		0	0	User W3HAV3 on TONY-LAPTOP logged in
9 JUL 2011	1:57 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
8 JUL 2011	10:20 PM	LOGIN: User W3HAV3 on TONYHOME logged into Links.		0	0	User W3HAV3 on TONYHOME logged into
8 JUL 2011	10:15 PM	LOGIN: User W3HAV3 on TONYHOME logged into Links.		0	0	User W3HAV3 on TONYHOME logged into
8 JUL 2011	10:15 PM	LOGIN: User W3HAV3 on TONYHOME logged into Links.		0	0	User W3HAV3 on TONYHOME logged into
8 JUL 2011	10:11 PM	LOGIN: User W3HAV3 on TONYHOME logged into Links.		0	0	User W3HAV3 on TONYHOME logged into
8 JUL 2011	10:10 PM	LOGIN: User W3HAV3 on TONYHOME logged into Links.		0	0	User W3HAV3 on TONYHOME logged into
8 JUL 2011	11:29 AM	LOGIN: User 1 on TEST-PC logged into Links.	MPT, MPT	0	0	User 1 on TEST-PC logged into Links.
8 JUL 2011	11:16 AM	LOGIN: User 1 on TEST-PC logged into Links.	MPT, MPT	0	0	User 1 on TEST-PC logged into Links.
8 JUL 2011	2:44 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
8 JUL 2011	12:55 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
8 JUL 2011	12:44 AM	PayLink Login: Successfully logged into PayLink	MPT, MPT			Successfully logged into PayLink
8 JUL 2011	12:44 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
7 JUL 2011	11:13 PM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
7 JUL 2011	11:12 PM	LOGIN: User W3HAV3 on NEIL-THINK logged into Links.		0	0	User W3HAV3 on NEIL-THINK logged into
7 JUL 2011	10:10 PM	LOGIN: User 1 on MICKA_LAPTOP logged into Links.	MPT, MPT	0	0	User 1 on MICKA_LAPTOP logged into Link
7 JUL 2011	11:48 AM	PayLink Login: Successfully logged into PayLink	MPT, MPT			Successfully logged into PayLink
7 JUL 2011	11:08 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
7 JUL 2011	2:01 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.
7 JUL 2011	2:01 AM	LOGINFAILURE: User 1 on NEIL-THINK failed to log in.	MPT, MPT	0	0	User 1 on NEIL-THINK failed to log in.
6 JUL 2011	10:29 AM	PayLink Login: Successfully logged into PayLink	MPT, MPT			Successfully logged into PayLink
6 JUL 2011	10:24 AM	LOGIN: User 1 on NEIL-THINK logged into Links.	MPT, MPT	0	0	User 1 on NEIL-THINK logged into Links.

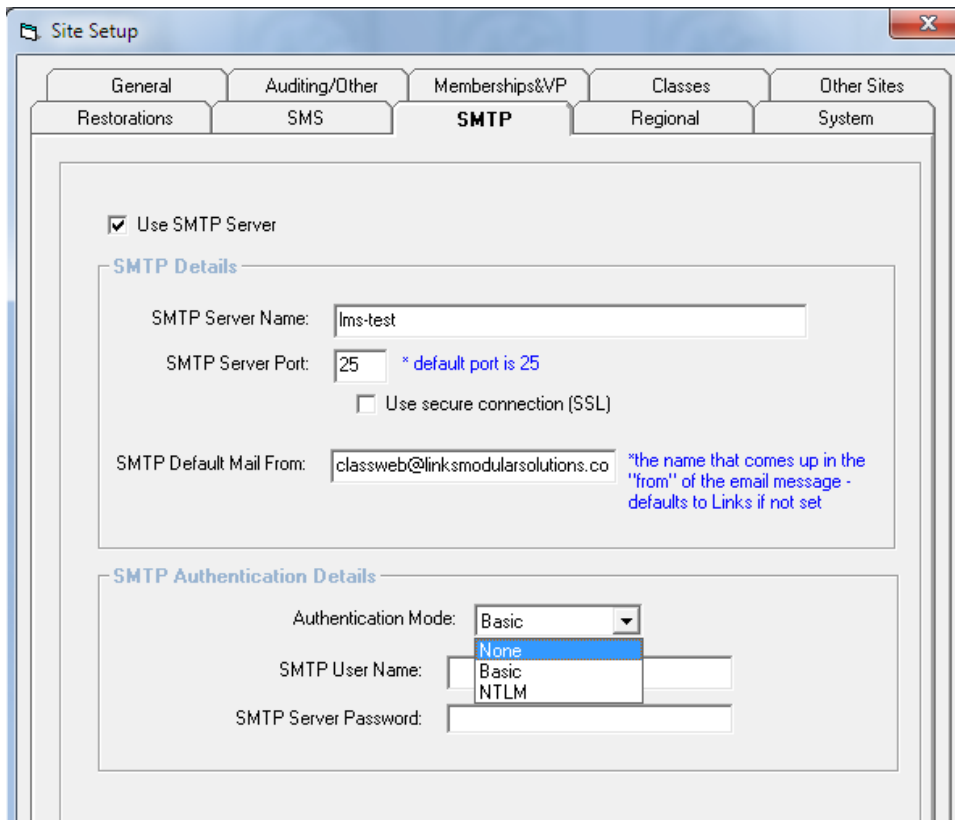
## Direct Debit Reversals

New security has been added to Direct Debit reversals to avoid complications when reversing LinksPay direct debits. User can no longer reverse a run that hasn't been sent, but that isn't the latest run (NB: In a multi-location environment you will need to reverse in order of when the runs are processed regardless of the location they are for)

## SMTP Changes

Due to the growing changes in domain names available, the SMTP details in Links can now cater for a Hyphen in the domain name. SMTP email is used for sites who do not have direct access to outlook or if you are using one of the extension modules such as pay.link, classweb.link or memweb.link. Links also now caters for 2 types of authentication and SSL connections. It is best to speak to your IT Professional or Internet Service Provider to ensure you have the correct details entered here.

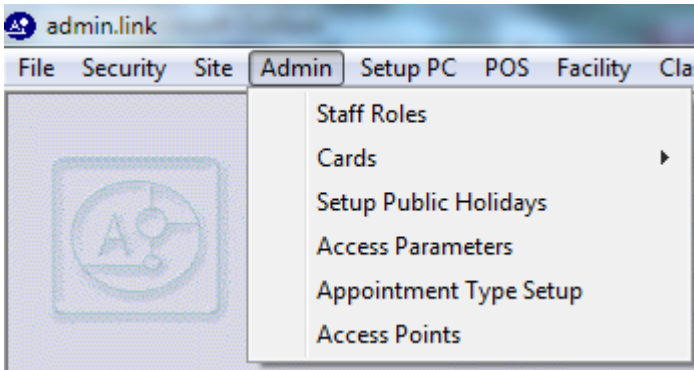
Admin>SiteMenu>SiteSetup>SMTP



The screenshot shows the 'Site Setup' window with the 'SMTP' tab selected. The 'Use SMTP Server' checkbox is checked. The 'SMTP Details' section includes fields for 'SMTP Server Name' (lms-test), 'SMTP Server Port' (25), and 'SMTP Default Mail From' (classweb@linksmodularsolutions.co). The 'SMTP Authentication Details' section shows 'Authentication Mode' set to 'Basic' and 'SMTP User Name' set to 'Basic'.

## Menu Changes


With the increased security in Version 9, only administrators can access the Site Menu and Security Menu. To cater for this change a number of items that may be required for access by non administrators have been moved to an Admin Menu



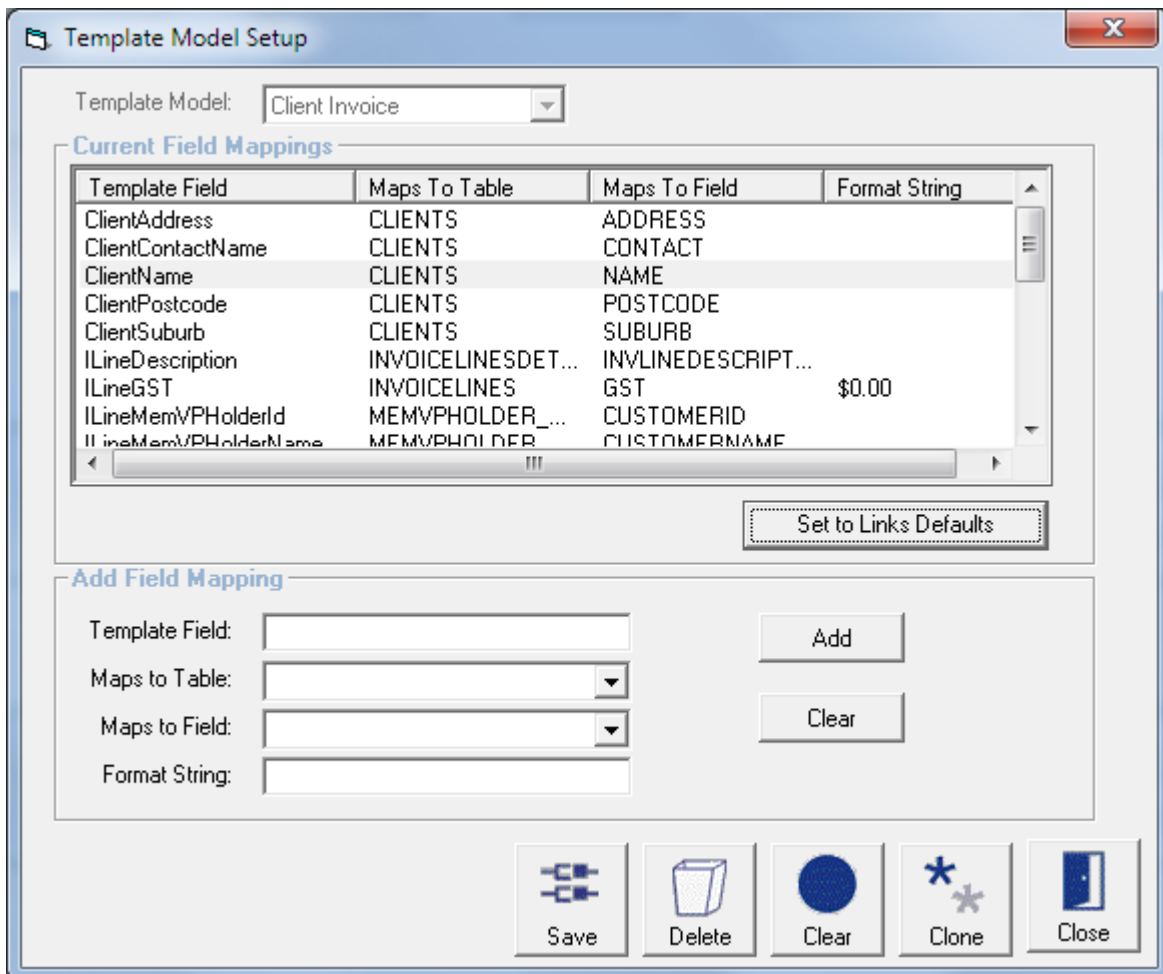
## Invoice Changes

To assist with facility bookings invoices the product description field used on invoices now includes the details of the booking i.e. Lane 1 9am to 11am.

After upgrading to Version 9.4.0 you will need to re-set the template models even if you don't use invoicing for facility bookings. To do this;

1. Go to Admin
2. Select the POS Menu
3. Select Invoices
4. Select Template Models
5. Choose the Customer Template
6. Click on  button
7. Click on Save
8. Repeat steps 5 to 7 for the Client invoice

Please note if you have customised merge fields, please contact Links support before doing this



The screenshot shows the 'Template Model Setup' window with the following details:

- Template Model:** Client Invoice
- Current Field Mappings:**

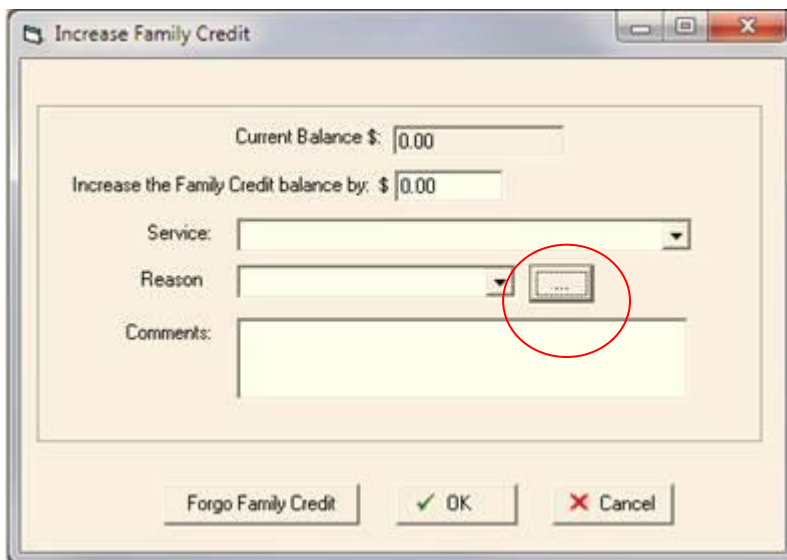
Template Field	Maps To Table	Maps To Field	Format String
ClientAddress	CLIENTS	ADDRESS	
ClientContactName	CLIENTS	CONTACT	
ClientName	CLIENTS	NAME	
ClientPostcode	CLIENTS	POSTCODE	
ClientSuburb	CLIENTS	SUBURB	
ILineDescription	INVOICELINESDET...	INVLINEDESCRIPT...	
ILineGST	INVOICELINES	GST	\$0.00
ILineMemVPHolderId	MEMVPHOLDER_...	CUSTOMERID	
ILineMemVPHolderName	MEMVPHOLDER	CUSTOMERNAME	
- Add Field Mapping:**
  - Template Field:
  - Maps to Table:
  - Maps to Field:
  - Format String:
  - Buttons: Add, Clear
- Bottom Navigation:** Save, Delete, Clear, Clone, Close

## Family Credits to be used for Memberships & Visit Passes

In past versions of Links there was some limitation arounds the use of family credit for purchasing Memberships & Visit Passes. To avoid confusion this has now been locked off from use as it was not working as many users expected it to. If you wish to use Family Credit to purchase a membership or visit pass, you will need to first pay out the family credit in one transaction to reduce your till balance and then process a membership payment or visit pass sale in a separate transaction to the same value. This will then balance your Till to \$0.00

## Family credit increase reasons table

In previous versions of Links, we used the 'Make Adjustment' reasons table maintenance when increasing family credit. This has now been amended for Version 9 and now uses its own table of reasons. If you have not setup Family Credit Increase Reasons in your table maintenance in the past you will need to set these up before you are able to issue family credit. This can be done from the Increase Family Credit screen on the fly as seen below.



The screenshot shows a window titled "Increase Family Credit". Inside the window, there are two text input fields: "Current Balance \$:" with the value "0.00" and "Increase the Family Credit balance by: \$" with the value "0.00". Below these are two dropdown menus: "Service:" and "Reason:". The "Reason:" dropdown menu is circled in red. Below the dropdowns is a text area labeled "Comments:". At the bottom of the window, there are three buttons: "Forgo Family Credit", "OK", and "Cancel".



## Maximum Debit Changes

Based on feedback from our customers, the maximum debit parameter has been changed to allow transactions that exceed this amount to be processed. In past versions any amount for the direct debit that exceeded the maximum amount was placed in the errors section. Now it is placed in the passed section, with an exception comment of MAX DEBIT EXCEEDED. Please ensure that you are checking your exceptions thoroughly on each direct debit run.

The screenshot shows a window titled "Exceptions" with a subtitle "Exceptions to be passed to LinksPay". The window contains a table with the following data:

RespId	StudId	StName	StdA...	Amount,\$	Exceptions
3827	3828	MARK,...	20.00	500.00	Standard fee overridden (once off) - TEST; Exceeds the maximum allowed per debit
3827	3902	MARK,...	80.00	500.00	Standard fee overridden (once off) - TEST; Exceeds the maximum allowed per debit



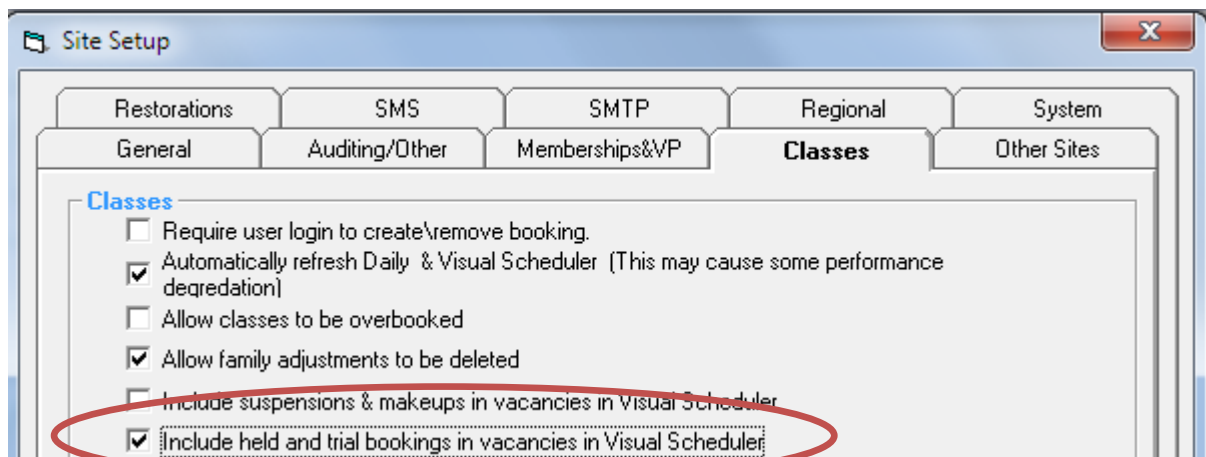
## class.link changes

### Trial Classes

Links now has the ability to track trial classes. This is catered for through a new booking type that allows the booking of a trial class for a selected number of weeks. A trial booking will not charge anything to a family account at the time of the booking, however when the booking is made permanent a charge can be applied to the initial trial classes.

### Admin Setup

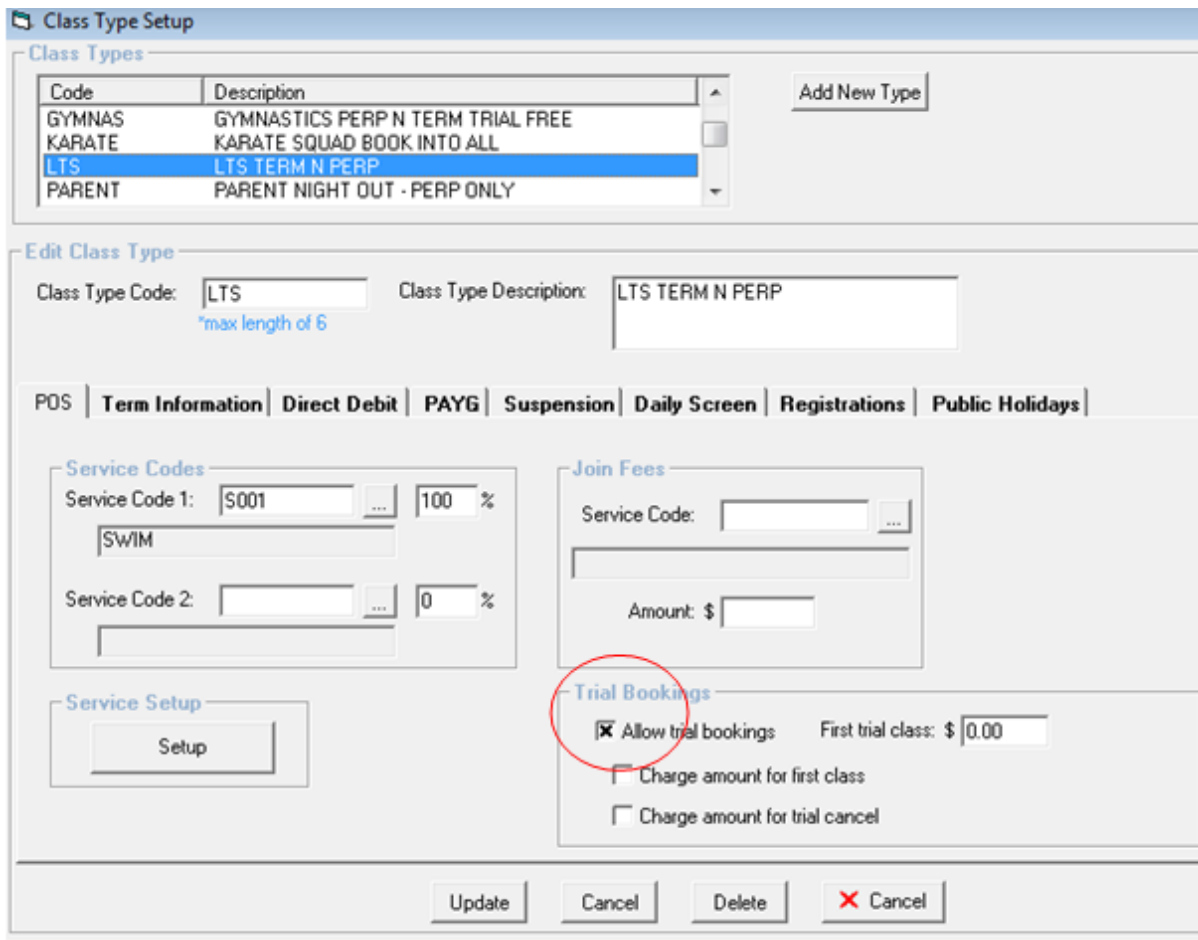
A new switch has been added to allow a trial booking to take up a vacancy within the class. If you wish to utilise this feature you will need to turn this switch on in Admin>SiteMenu>SiteSetup>ClassesTab



### Setting up a class type for trial bookings

You are able to permit trial class bookings by class type. Allowing you to offer trial classes in some programs, but not others as required. To set this up you just need to check the 'Allow Trial bookings' box in the new trial bookings section of

Admin > Classes > ClassTypes > POS



**Class Type Setup**

**Class Types**

Code	Description
GYMNAS	GYMNASTICS PERP N TERM TRIAL FREE
KARATE	KARATE SQUAD BOOK INTO ALL
LTS	LTS TERM N PERP
PARENT	PARENT NIGHT OUT - PERP ONLY

**Edit Class Type**

Class Type Code:  \*max length of 6    Class Type Description:

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

**Service Codes**

Service Code 1:   %

Service Code 2:   %

**Join Fees**

Service Code:

Amount: \$

**Service Setup**

**Trial Bookings**

Allow trial bookings    First trial class: \$

Charge amount for first class

Charge amount for trial cancel

This is all that is required, so you can then just click update

The other options available to you here are

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

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

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

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

### Making a trial booking

You begin a trial booking the same as any other booking

Classes > Classes > Visual Scheduler > Make a Booking

**Create Student Booking**

**Class Details**

Class Level: <input type="text" value="SHARK"/>	Day: <input type="text" value="Tuesday"/>	Start Time: <input type="text" value="9:30 AM"/>
Teacher: <input type="text" value="WBO 1, WBO 1"/>		End Time: <input type="text" value="10:00 AM"/>
Area: <input type="text" value="AREA 6"/>		

**Booking Type**

<input type="radio"/> Term	<input checked="" type="checkbox"/> Direct debit
<input checked="" type="radio"/> Perpetual	
<input type="radio"/> Makeup	<input type="checkbox"/> Trial Booking
<input type="radio"/> Casual	

<b>Student Details</b> <table style="width: 100%;"> <tr> <td>Student No.: <input type="text" value="3822"/></td> <td>Age: <input type="text"/></td> </tr> <tr> <td colspan="2">Name: <input type="text" value="BUTLER, JOANNE"/></td> </tr> <tr> <td colspan="2">Responsible Person: <input type="text" value="BUTLER, LEON"/></td> </tr> </table>	Student No.: <input type="text" value="3822"/>	Age: <input type="text"/>	Name: <input type="text" value="BUTLER, JOANNE"/>		Responsible Person: <input type="text" value="BUTLER, LEON"/>		<b>Booking Details</b> <table style="width: 100%;"> <tr> <td>From: <input type="text" value="23 AUG 2011"/></td> <td><input type="text" value="D"/></td> </tr> <tr> <td>Consultant: <input type="text" value="1"/></td> <td><input type="text" value="MPT,MPT"/></td> </tr> </table>	From: <input type="text" value="23 AUG 2011"/>	<input type="text" value="D"/>	Consultant: <input type="text" value="1"/>	<input type="text" value="MPT,MPT"/>
Student No.: <input type="text" value="3822"/>	Age: <input type="text"/>										
Name: <input type="text" value="BUTLER, JOANNE"/>											
Responsible Person: <input type="text" value="BUTLER, LEON"/>											
From: <input type="text" value="23 AUG 2011"/>	<input type="text" value="D"/>										
Consultant: <input type="text" value="1"/>	<input type="text" value="MPT,MPT"/>										

<b>Fees</b> <div style="border: 1px solid #ccc; padding: 5px;"> <b>Discounts/Concessions</b> <table style="width: 100%;"> <tr> <td>Discount: <input type="text" value="0"/> %</td> </tr> <tr> <td><b>(first child, first class)</b></td> </tr> <tr> <td><input type="checkbox"/> Concession</td> </tr> </table> </div>	Discount: <input type="text" value="0"/> %	<b>(first child, first class)</b>	<input type="checkbox"/> Concession	<table style="width: 100%;"> <tr> <td>Joining fee: \$ <input type="text" value="0.00"/></td> <td>Fee each DD: \$ <input type="text" value="125.00"/></td> </tr> <tr> <td>+ Pro rata: \$ <input type="text" value="50.00"/></td> <td><input type="checkbox"/> ? <input type="checkbox"/> Include next period</td> </tr> <tr> <td>- Discount: \$ <input type="text" value="0.00"/></td> <td><a href="#">Next Period 01 Feb 2011</a></td> </tr> <tr> <td colspan="2">+ Registration fee: \$ <input type="text" value="0.00"/></td> </tr> <tr> <td>= Due: \$ <input type="text" value="50.00"/></td> <td>Registrations <input type="button" value="Pay now"/></td> </tr> <tr> <td>Amount in Credit: \$ <input type="text"/></td> <td>Family Credit: \$ <input type="text" value="0.00"/></td> </tr> <tr> <td></td> <td>Amount to pay: \$ <input type="text" value="0.00"/></td> </tr> </table>	Joining fee: \$ <input type="text" value="0.00"/>	Fee each DD: \$ <input type="text" value="125.00"/>	+ Pro rata: \$ <input type="text" value="50.00"/>	<input type="checkbox"/> ? <input type="checkbox"/> Include next period	- Discount: \$ <input type="text" value="0.00"/>	<a href="#">Next Period 01 Feb 2011</a>	+ Registration fee: \$ <input type="text" value="0.00"/>		= Due: \$ <input type="text" value="50.00"/>	Registrations <input type="button" value="Pay now"/>	Amount in Credit: \$ <input type="text"/>	Family Credit: \$ <input type="text" value="0.00"/>		Amount to pay: \$ <input type="text" value="0.00"/>
Discount: <input type="text" value="0"/> %																		
<b>(first child, first class)</b>																		
<input type="checkbox"/> Concession																		
Joining fee: \$ <input type="text" value="0.00"/>	Fee each DD: \$ <input type="text" value="125.00"/>																	
+ Pro rata: \$ <input type="text" value="50.00"/>	<input type="checkbox"/> ? <input type="checkbox"/> Include next period																	
- Discount: \$ <input type="text" value="0.00"/>	<a href="#">Next Period 01 Feb 2011</a>																	
+ Registration fee: \$ <input type="text" value="0.00"/>																		
= Due: \$ <input type="text" value="50.00"/>	Registrations <input type="button" value="Pay now"/>																	
Amount in Credit: \$ <input type="text"/>	Family Credit: \$ <input type="text" value="0.00"/>																	
	Amount to pay: \$ <input type="text" value="0.00"/>																	

**Vacancy Information**

Au	Au	Se	Se	Se	Se	Oc	Oc	Oc	Oc	No	No	No	No	No	De	De	De	De	Ja	Ja	Ja	Ja	Ja	Fe	Fe	Fe	Fe	Mc
23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	31	7	14	21	28	6

<span style="color: green;">■</span> = Vacancy	<span style="color: red;">■</span> = Fully Booked
<span style="color: magenta;">■</span> = Vacancy Filled by Make Up	<span style="color: yellow;">■</span> = Public Holiday

Select 'Trial booking'

**Create Student Trial Booking**

**Class Details**

Class Level: SHARK Day: Tuesday Start Time: 9:30 AM  
 Teacher: WBO 1, WBO 1 End Time: 10:00 AM  
 Area: AREA 6

**Booking Type**

Term  Direct debit  
 Perpetual  
 Makeup  Trial Booking  
 Casual

**Student Details**

Student No.: 3822 Age:   
 Name: BUTLER, JOANNE  
 Responsible Person: BUTLER, LEON

**Booking Details**

From: 23 AUG 2011 D  
 Consultant: 1 MPT,MPT

**Vacancy Information**

Au	Au	Se	Se	Se	Se	Oc	Oc	Oc	Oc	No	No	No	No	No	De	De	De	De	Ja	Ja	Ja	Ja	Ja	Fe	Fe	Fe	Fe	Mc
23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	31	7	14	21	28	6

= Vacancy       = Fully Booked  
 = Vacancy Filled by Make Up       = Public Holiday

Customer Details

Select OK to complete the trial booking

If you have registration fees on your classes you will receive the following screen.

Select 'Trial Booking Only'

Registration Fees

Registration Fees are payable for this class.  
Select any optional registration fees if applicable  
*One or more registrations are due within 30 days*

**REG001**  
\$30.00

**TRIAL BOOKING ONLY**    **CASUAL BOOKING ONLY**

**Registrations Selected for this Booking**

Registration Type	Cost, \$	Start Date	Cease Date
-------------------	----------	------------	------------

**Total Cost: \$ 0.00**

Cancel Booking

OK

Trial booking will then be automatically checked for you so you can just click OK to complete the booking

**Create Student Trial Booking**

**Class Details**

Class Level: SHARK Day: Tuesday Start Time: 9:30 AM  
 Teacher: WBO 1, WBO 1 End Time: 10:00 AM  
 Area: AREA 6

**Booking Type**

Term  Direct debit  
 Perpetual  
 Makeup  Trial Booking  
 Casual

**Student Details**

Student No.: 3822 Age:   
 Name: BUTLER, JOANNE  
 Responsible Person: BUTLER, LEON

**Booking Details**

From: 23 AUG 2011 D  
 Consultant: 1 MPT,MPT

**Vacancy Information**

Au	Au	Se	Se	Se	Se	Oc	Oc	Oc	Oc	No	No	No	No	No	De	De	De	De	Ja	Ja	Ja	Ja	Ja	Fe	Fe	Fe	Fe	Mc
23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	31	7	14	21	28	6

= Vacancy       = Fully Booked  
 = Vacancy Filled by Make Up       = Public Holiday

Customer Details       

Trial bookings will be displayed on the daily attendance with a 'T'

**Note.** The change to casual to 'C' and Makeup to 'M'

Daily Attendances LTS

Show Attendances     PAYG Only   

Time	Name	Fam Balance, \$	Attend	Cancel	Level	Area	Teacher
09:30 AM	<del>BBIXTON, BREA</del>	-80.00	<input type="checkbox"/>	<input type="checkbox"/>	PUFFER FISH	AREA 2	KOFN,GONOOMMO
09:30 AM	T: BUTLER, JOANNE	0.00	<input type="checkbox"/>	<input type="checkbox"/>	SHARK	AREA 6	WBO 1,WBO 1
09:30 AM	FILLIPS, BOAZ	-315.00	<input type="checkbox"/>	<input type="checkbox"/>	JELLYFISH	AREA 5	CFOPPON,OSOKO

The same changes have also been made to the daily classes screen

9:30 AM-10:00 AM  
 WBO 1, WBO 1 0  
 NOVA, BRYAN N  
 T: ANDERSON, BILLY N  
 T: BUTLER, JOANNE N

A TRIAL CLASS message will also appear when the student checks in for class

Visits

**JOANNE BUTLER**

This is the **FIRST LESSON!**  
 This student has a **TRIAL CLASS** today.  
 Visit for **BUTLER, JOANNE OK**  
**SHARK** class at **AREA 6** at **9:30:00 AM**  
 with **FINDLAY, MICHELLE**

### New Trial Booking screen

To assist with managing trial classes LMS introduces a new management screen

Classes > Classes > Trial Bookings

Student	Responsible Person	Phone	Class Type	Level	Detail	Teacher	Trial Date	Status
PILOCK, BEN	PILOCK, BOB		BABY	BLUE GRP	Friday 8:00a (AREA 5)	RIX, GRAH...	7/22/2011	Not attended
VELOM, VINNIE	VELOM, VICTOR		LTS	OPEN	Friday 10:00a (AREA 6)	WBO 7, WB...	7/29/2011	Attended
VELOM, VINNIE	VELOM, VICTOR		LTS	OPEN	Saturday 9:00a (AREA 3)	MASTERS, ...	7/30/2011	Not attended
FAMILY, STUDENT...	FAMILY, NEW	449256485	LTS	JELLYFISH	Tuesday 9:00a (AREA 7)	CFOPPON, ...	8/2/2011	Not attended
WOWWKOP, COMD	WOWWKOP, COC...	232-123-3...	LTS	OPEN	Saturday 9:00a (AREA 3)	MASTERS, ...	8/6/2011	Not attended
MILLER, LORI	MILLER, KEVIN		LTS	ORCA	Saturday 11:00a (ARE...	OBBDWW, ...	8/6/2011	Not attended
OM YOFPOGO, FO...	OM YOFPOGO, O...	232-121-2...	DANCE	DANCE	Tuesday 6:00p (AREA 5)	KOFN, GON...	8/9/2011	Not attended
TOMVOSTWOON, ...	TOMVOSTWOON,...	232-121-3...	DANCE	DANCE	Thursday 6:00p (AREA 2)	MASTERS, ...	8/11/2011	Not attended
BLAST, LOWIE	BLAST, MR	449256485	LTS	SHARK	Monday 3:00p (AREA 2)	WBO 3, WB...	8/15/2011	Attended
ANDERSON, BILLY...	ANDERSON, JACK	449256485	LTS	PUFFER ...	Tuesday 10:00a (AREA...	KOFN, GON...	8/16/2011	Not attended
JOHNSON, KATE	JOHNSON, LISA	0410979003	ADULT	Adult Inte...	Wednesday 10:00a (A...	BOSOWTK...	8/17/2011	Attended
APPLEGATE, KELLY	APPLEGATE, CHR...	449256485	LTS	JELLYFISH	Thursday 9:00a (AREA 6)	WBO 2, WB...	8/18/2011	Not attended
ANDERSON, MITCH	ANDERSON, JACK	449256485	LTS	PUFFER ...	Friday 9:30a (AREA 5)	REYNOLDS...	8/19/2011	Not attended
ANDERSON, BILLY...	ANDERSON, JACK	449256485	LTS	SHARK	Tuesday 9:30a (AREA 6)	FINDLAY, ...	8/23/2011	Not attended
BUTLER, JOANNE	BUTLER, LEON		LTS	SHARK	Tuesday 9:30a (AREA 6)	FINDLAY, ...	8/23/2011	Attended
BILSON, PAUL	BILSON, BYRON		LTS	PUFFER ...	Thursday 1:30p (AREA 5)	JAMESON, ...	8/25/2011	Future

Email Student Details Family Details **Book It** Cancel Trial Close

From this screen you can see the details of all pending trial bookings

Email

Click this to email the responsible person of a trial booking past or present

**Student Details**


Click this to access student details

**Family Details**

Click this to access the family details

**Converting a trial booking**

To convert a trial booking into a term or perpetual booking highlight the booking in the trial booking



screen (see above) and click

Then continue booking the class as you would normally

**Confirm Trial Booking**

**Class Details**

Class Level:  Day:  Start Time:   
 Teacher:  End Time:   
 Area:

**Booking Type**

Term       Direct debit  
 Perpetual  
 Makeup  
 Casual

**Student Details**

Student No.:  Age:   
 Name:   
 Responsible Person:

**Booking Details**

From:    
 Consultant:

**Fees**

**Discounts/Concessions**

Discount:  %  
**(first child, first class)**  
 Concession

Joining fee: \$  Fee each DD: \$   
 + Pro rata: \$   Include next period  
 - Discount: \$  [Next Period 01 Feb 2011](#)

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

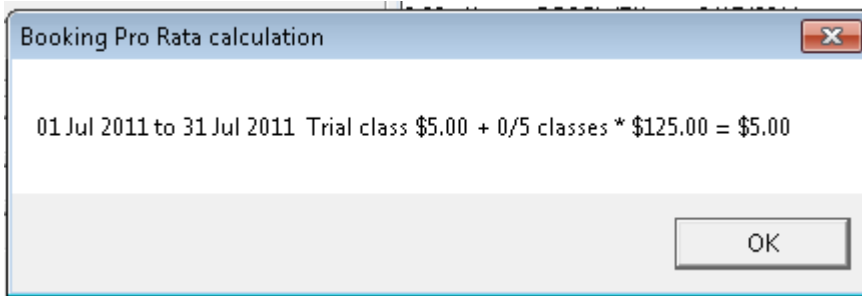
**Vacancy Information**

Jl	Au	Au	Au	Au	Se	Se	Se	Se	Se	Oc	Oc	Oc	Oc	No	No	No	No	De	De	De	De	De	Ja	Ja	Ja	Ja	Fe	Fe
29	5	12	19	26	2	9	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	3	10

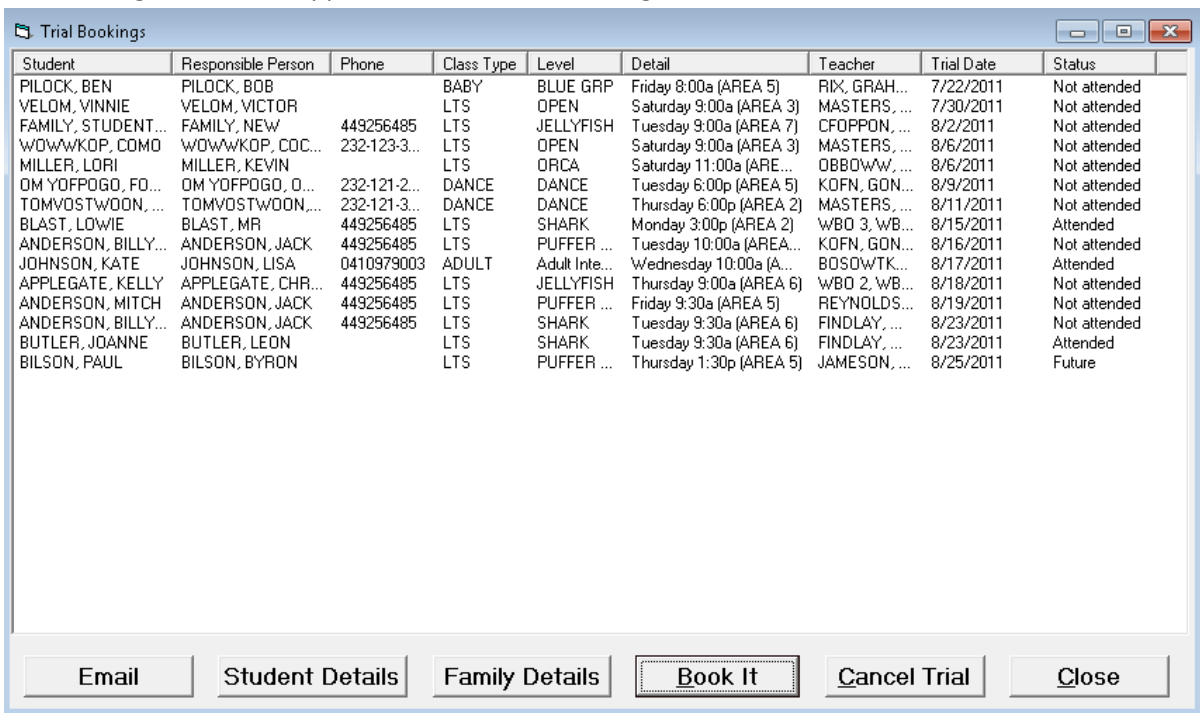
= Vacancy       = Fully Booked  
 = Vacancy Filled by Make Up       = Public Holiday



See above the fee for a trial in this case is \$5 that is the last class of the month so the amount due is just \$5



The booking will then disappear from the Trial Booking screen

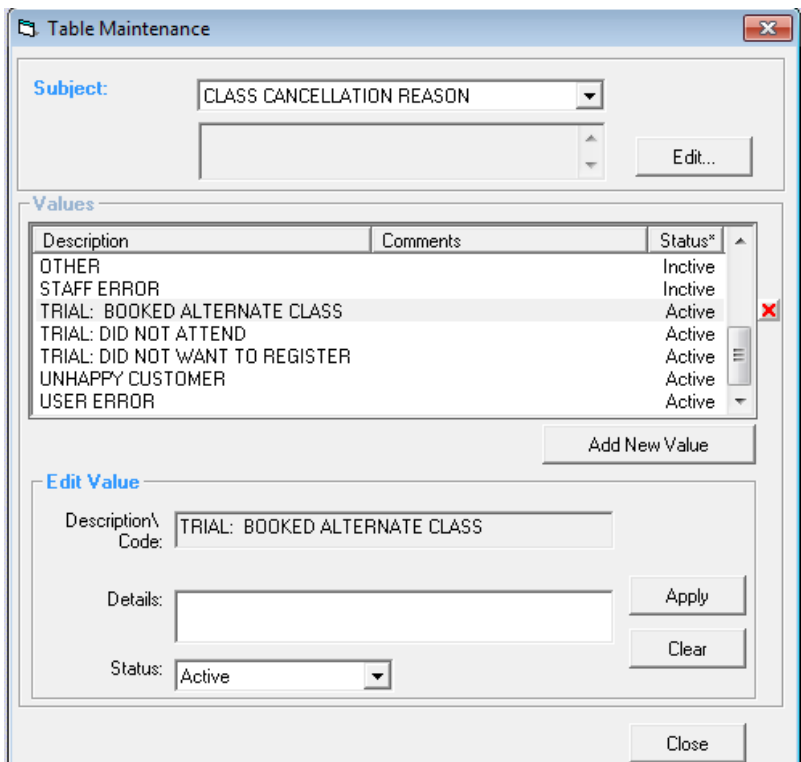


Student	Responsible Person	Phone	Class Type	Level	Detail	Teacher	Trial Date	Status
PILOCK, BEN	PILOCK, BOB		BABY	BLUE GRP	Friday 8:00a (AREA 5)	RIX, GRAH...	7/22/2011	Not attended
VELOM, VINNIE	VELOM, VICTOR		LTS	OPEN	Saturday 9:00a (AREA 3)	MASTERS, ...	7/30/2011	Not attended
FAMILY, STUDENT...	FAMILY, NEW	449256485	LTS	JELLYFISH	Tuesday 9:00a (AREA 7)	CFOPPON, ...	8/2/2011	Not attended
WOWWKOP, COMO	WOWWKOP, COC...	232-123-3...	LTS	OPEN	Saturday 9:00a (AREA 3)	MASTERS, ...	8/6/2011	Not attended
MILLER, LORI	MILLER, KEVIN		LTS	ORCA	Saturday 11:00a (ARE...	OBBOVW, ...	8/6/2011	Not attended
OM YDFPOGO, FO...	OM YDFPOGO, O...	232-121-2...	DANCE	DANCE	Tuesday 6:00p (AREA 5)	KOFN, GON...	8/9/2011	Not attended
TOMVOSTWOON, ...	TOMVOSTWOON,...	232-121-3...	DANCE	DANCE	Thursday 6:00p (AREA 2)	MASTERS, ...	8/11/2011	Not attended
BLAST, LOWIE	BLAST, MR	449256485	LTS	SHARK	Monday 3:00p (AREA 2)	WBO 3, WB...	8/15/2011	Attended
ANDERSON, BILLY...	ANDERSON, JACK	449256485	LTS	PUFFER ...	Tuesday 10:00a (AREA...	KOFN, GON...	8/16/2011	Not attended
JOHNSON, KATE	JOHNSON, LISA	0410979003	ADULT	Adult Inte...	Wednesday 10:00a (A...	BOSOWTK...	8/17/2011	Attended
APPLEGATE, KELLY	APPLEGATE, CHR...	449256485	LTS	JELLYFISH	Thursday 9:00a (AREA 6)	WBO 2, WB...	8/18/2011	Not attended
ANDERSON, MITCH	ANDERSON, JACK	449256485	LTS	PUFFER ...	Friday 9:30a (AREA 5)	REYNOLDS...	8/19/2011	Not attended
ANDERSON, BILLY...	ANDERSON, JACK	449256485	LTS	SHARK	Tuesday 9:30a (AREA 6)	FINDLAY, ...	8/23/2011	Not attended
BUTLER, JOANNE	BUTLER, LEON		LTS	SHARK	Tuesday 9:30a (AREA 6)	FINDLAY, ...	8/23/2011	Attended
BILSON, PAUL	BILSON, BYRON		LTS	PUFFER ...	Thursday 1:30p (AREA 5)	JAMESON, ...	8/25/2011	Future

### Canceling a trial booking

As part of your setup we recommend adding some specific trial class cancellation reasons via

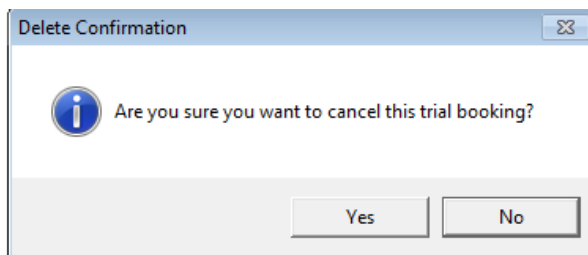
Admin > Site > Table Maintenance > Class Cancellation Reason



Then to cancel a trial booking highlight the booking in the Trial Booking screen (see above) and click



You will then receive the following message



Click 'yes' and the following screen will appear

Cancel Trial Class

Student: VELOM, VINNIE

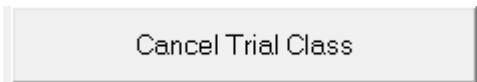
Class:	LTS	Level:	OPEN
Day:	Saturday	Trial Date:	7/30/2011
Time:	09:00:00	Last Attended:	
Area:	AREA 3		

Reason: Trial: Not ready to book  Charge for trial

Amount to to charge: \$ 0.00

Select your cancellation reason from the drop down list

Note. If you had selected in the class type setup to charge for cancelled trials the amount will appear automatically. If not, then you can add this here as required.



Then click

The Trial Booking will now be removed from the Trial Booking screen

Trial Bookings

Student	Responsible Person	Phone	Class Type	Level	Detail	Teacher	Trial Date	Status
PILOCK, BEN	PILOCK, BOB		BABY	BLUE GRP	Friday 8:00a (AREA 5)	RIX, GRAH...	7/22/2011	Not attended
FAMILY, STUDENT...	FAMILY, NEW	449256485	LTS	JELLYFISH	Tuesday 9:00a (AREA 7)	CFOPPON, ...	8/2/2011	Not attended
WOWWKOP, COMO	WOWWKOP, COC...	232-123-3...	LTS	OPEN	Saturday 9:00a (AREA 3)	MASTERS, ...	8/6/2011	Not attended
MILLER, LORI	MILLER, KEVIN		LTS	ORCA	Saturday 11:00a (ARE...	OBBO'W'W, ...	8/6/2011	Not attended
OM YOFFOGO, FO...	OM YOFFOGO, O...	232-121-2...	DANCE	DANCE	Tuesday 6:00p (AREA 5)	KOFN, GON...	8/9/2011	Not attended
TOMVOSTWOON, ...	TOMVOSTWOON...	232-121-3...	DANCE	DANCE	Thursday 6:00p (AREA 2)	MASTERS, ...	8/11/2011	Not attended
BLAST, LOWIE	BLAST, MR	449256485	LTS	SHARK	Monday 3:00p (AREA 2)	WBO 3, WB...	8/15/2011	Attended
ANDERSON, BILLY...	ANDERSON, JACK	449256485	LTS	PUFFER ...	Tuesday 10:00a (AREA...	KOFN, GON...	8/16/2011	Not attended
JOHNSON, KATE	JOHNSON, LISA	0410979003	ADULT	Adult Inte...	Wednesday 10:00a (A...	BOSOWTK...	8/17/2011	Attended
APPLEGATE, KELLY	APPLEGATE, CHR...	449256485	LTS	JELLYFISH	Thursday 9:00a (AREA 6)	WBO 2, WB...	8/18/2011	Not attended
ANDERSON, MITCH	ANDERSON, JACK	449256485	LTS	PUFFER ...	Friday 9:30a (AREA 5)	REYNOLDS...	8/19/2011	Not attended
ANDERSON, BILLY...	ANDERSON, JACK	449256485	LTS	SHARK	Tuesday 9:30a (AREA 6)	FINDLAY, ...	8/23/2011	Not attended
BUTLER, JOANNE	BUTLER, LEON		LTS	SHARK	Tuesday 9:30a (AREA 6)	FINDLAY, ...	8/23/2011	Attended
BILSON, PAUL	BILSON, BYRON		LTS	PUFFER ...	Thursday 1:30p (AREA 5)	JAMESON, ...	8/25/2011	Future

## Reporting of trial bookings

### Supervisor Roster

Clearly displays trial bookings (trial), as with make ups (mu) and casuals (cas)

### Supervisor Roster

Roster For :	TUE 23 Aug 2011 09:30 AM	Age	D.S.L	L.R.A	Skills
Class Details	Students	Hlth/U/sr Defnd			
[FINDLAY, MICHELLE] 09:30 AM (3/3) AREA B SHARK 525	ANDERSON, BILLY BOB (trial) (3343) BUTLER, JOANNE (trial) (3822) *NOVA, BRYAN (3643)	-, One @ 07/10 - -	. . . . 07/11	. . . . 23/08 . .	. . . . .

There is also a list of trial students on the last page

### Supervisor Roster

#### Trial bookings

Lesson Time	Date	Student Name	Level	Teacher
09:30 AM	23 Aug 2011	ANDERSON, BILLY BOB	SHARK	FINDLAY, MICHELLE
09:30 AM	23 Aug 2011	BUTLER, JOANNE	SHARK	FINDLAY, MICHELLE

### Student Booking Report

A trial booking column has been added to this report

#### Student Booking Numbers Summary Report From: 22 AUG 2011 To: 28 AUG 2011 Location: LOCATION1

Note: This report shows the number of bookings. Also, a student may have one or more bookings.

Level	Nbr Class	Max Stds	Tot Stds Booked DD	Tot Stds Booked Term	Tot Stds Makeup	Tot Stds Casual	Tot Stds Trial	Tot Stds PAYG	Tot Stds Booked	Vacancies	Booked, %
Adult Advanced	1	3	1	2	0	0	0	0	3	0	100
JELLYFISH	47	157	99	11	0	0	2	0	112	47	71.34
NEMO	4	10	6	1	0	0	0	0	7	3	70
OPEN	16	33	7	0	0	0	1	0	8	26	24.24
ORCA	6	18	7	0	0	0	1	0	8	11	44.44
PUFFER FISH	44	176	91	12	0	0	3	0	106	73	60.23
SHARK	66	206	125	7	0	0	3	0	135	74	65.53
TURTLE	30	92	39	4	0	0	0	0	43	49	46.74
<b>TOTAL:</b>	<b>214</b>	<b>695</b>	<b>375</b>	<b>37</b>	<b>0</b>	<b>0</b>	<b>10</b>	<b>0</b>	<b>422</b>	<b>283</b>	<b>60.72</b>

### Trial Booking Statistics Report

This new report has been developed for the trial booking conversion data enabling you to retrieve data based on a number of values

Reporting > Classes > Statistics > Trial Booking Statistics

Trial Bookings Statistics

Location: LOCATION1

**Selection Criteria**

From Date: 1 AUG 2011 D

To Date: 27 AUG 2011 D

Starting Times

After: [ ]

Before: [ ]

**Class Types**

Class Type

- 2 WEEK INTENSIVE HP - SELECT C
- ADULT PERP ONLY
- ANOTER SELECT TO BOOKINTO HF

Select All

**Select Level(s)**

Level

- Adult Advanc...
- Adult Beginner
- Adult Interme...
- All-Star
- UNDEF

Select All

**Teachers**

- BOSDWTKY, KSOT
- C, RACHEL
- CFOPPON, OSOKO
- CFOPPOON-FSDWZ, WSOVOT

Select All

Display Details \*\*\* required for export

Include converted

Include cancelled

Include pending

Print

Export

Graph

Preview ...

Email

Close

The summary view provides statistics on trials past, present and future

**Trial Bookings Statistics Report**  
for dates between 1 AUG 2011 and 27 AUG 2011

**Summary Report**

# Bookings	# Students	Student Conversion	Overall Conversion	Converted Attended	Converted Unattended	Pending Attended	Pending Unattended	Pending Future	Not Converted Attended	Not Converted Unattended
27	18	8 (44 %)	13 (48.15 %)	2 (33.33 %)	11 (40.74 %)	3 (11.11 %)	7 (25.93 %)	1 (3.7 %)	1 (3.7 %)	2 (7.41 %)

The legend provides an explanation for each of the values and percentages listed

**Legend:**

- # Bookings - Number of trial bookings
- # Students - Number of students with trial bookings
- Overall Conversion - Number of Converted trial bookings
- Converted Attended - Trial booking was attended, and then the student booked into the class
- Converted Unattended - Trial booking was NOT attended, but the student still booked into the class
- Pending Attended - Trial booking was attended, awaiting action (cancel or book)
- Pending Unattended - Trial booking was NOT attended, awaiting action (cancel or book)
- Pending Future - Trial booking is for a future date
- Not Converted Attended - Trial booking was attended, but then cancelled
- Not Converted Unattended - Trial booking was NOT attended, and then cancelled

Click here to print the data

Click here to export the data to excel (only available if 'display details' has been selected)

Display Details \*\* required for export

Include converted

Include cancelled

Include pending

With Display Details checked you will see a detailed list of the trial booking records for the period selected.

**Trial Bookings Statistics Report**  
for dates between 1 AUG 2011 and 27 AUG 2011

**Details Report**

Student Id	Student Name	Parent	Phone	Teacher	Class	Level	Time	Trial Date	Status	Cancel Rsn
3649	BALONY, CHRIS	BALONY, ROSE	111 111 1111	CFOPPON, OSOKO	LTS	JELLYFISH	16:00	8/15/2011	Attended Cancel	Trial: Chose another class
1149	OLANDER, VICTOR	OLANDER, MARY	232-123-3223	MASTERS, ROCKY	LTS	OPEN	09:00	8/6/2011	Unattended Trial	
3767	MILLER, LORI	MILLER, KEVIN		OBBOWWW, KONOWFON	LTS	SHARK	16:00	8/5/2011	Unattended Converted	
2854	PRICE, EVAN	PRICE, PETER	232-222-1332	FINDLAY, MICHELLE	LTS	NEMO	15:00	8/1/2011	Unattended Converted	

You also get:

- A breakdown of trial bookings by student

**Trial Bookings Statistics Report**  
for dates between 1 AUG 2011 and 27 AUG 2011

**Breakdown by Student Report**

Student	Student Name	# Bookings	Overall Conversion	Converted Attended	Converted Unattended	Pending Attended	Pending Unattended	Pending Future	Not Converted Attended	Not Converted Unattended
1149	OLANDER, VICTOR	1	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)	1 (100 %)	0 (0 %)	0 (0 %)	0 (0 %)
1150	OLANDER, ROLAND	1	0 (100 %)	0 (0 %)	1 (100 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)
2512	PRICE, NICK	1	0 (100 %)	0 (0 %)	1 (100 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)
2854	PRICE, EVAN	2	0 (100 %)	0 (0 %)	2 (100 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)

- A breakdown of trial bookings by teacher

**Trial Bookings Statistics Report**  
for dates between 1 AUG 2011 and 27 AUG 2011

**Breakdown by Teacher Report**

Teacher	Teacher Name	# Bookings	Overall Conversion	Converted Attended	Converted Unattended	Pending Attended	Pending Unattended	Pending Future	Not Converted Attended	Not Converted Unattended
105	KLEIN, KEVIN	1	0 (0 %)	0 (0 %)	0 (0 %)	1 (100 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)
2590	MASTERS, ROCKY	2	1 (50 %)	1 (100 %)	0 (0 %)	0 (0 %)	1 (50 %)	0 (0 %)	0 (0 %)	0 (0 %)
2592	JAMESON, KEVIN	2	0 (50 %)	0 (0 %)	1 (50 %)	0 (0 %)	0 (0 %)	1 (50 %)	0 (0 %)	0 (0 %)
2596	COLEMAN, LAURIE	1	0 (100 %)	0 (0 %)	1 (100 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)

- A trial cancellation reason report indicating why the business/teacher is failing to convert trial bookings

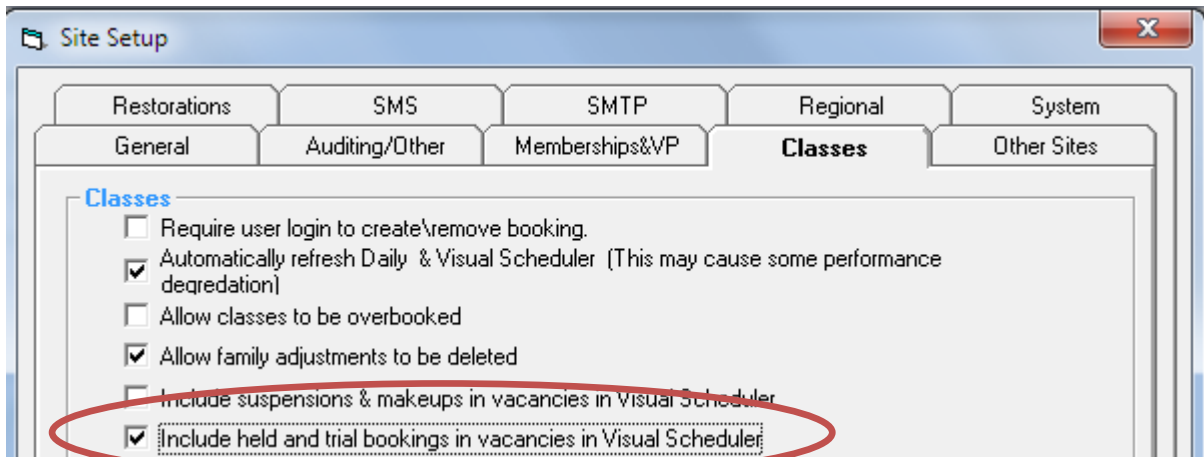
**Trial Bookings Statistics Report**  
for dates between 1 AUG 2011 and 27 AUG 2011

**Breakdown by Teacher Cancellation Report**

Teacher	Teacher Name	No Bookings	No Attended	Cancel Reason
2610	ALEXANDER, LILLY	1	1	Trial: Chose another class
2611	TBC 1, TBC 1	1	0	Trial: Didn't Attend
3004	LEWIS, DONNA	1	0	Trial: Not ready to book

## Held Bookings

A new switch has been added to allow a held booking to take up a vacancy within the class. If you wish to utilise this feature you will need to turn this switch on in Admin>SiteMenu>SiteSetup>ClassesTab



## Search for a Family by last 4 of Credit Card for Linkspay Vault Customers

If you need to find a family based on the last 4 digits of their credit card you can now do this in the family search screen. In the families screen click on the ... search button and you will see the search option below the name fields.



## Switches for Suspensions/Makeups & Trials/Helds

Previously Trials and Helds were ignored as vacancies on the Visual Scheduler but now a switch has been introduced to turn vacancies for Trials & Helds on/off depending on your requirements.

This switch has also had an effect on how the Suspensions/Make-up switch affects vacancies when working in tandem with the new switch.

The tables below demonstrate how vacancies will display on the Visual scheduler based on the different scenarios in place.

### Suspensions and Makeups

*Switch Off (include Suspensions & Makeups)*

Scenario	Booked	Cancelled	Makeup	Vacancy	Explanation
1	3	1	0	0	A cancellation does not free up a spot for makeup
2	2	0	1	0	A makeup takes up the spot for this week so have to book next week
3	2	1	1	0	The cancellation does not free up a spot for make up, and the makeup takes up the permanent spot so bookings will have to be made next week.

With the switch off a makeup takes a spot for that day.

*Switch On (include Suspensions & Make-ups)*

Scenario	Booked	Cancelled	Makeup	Vacancy	Explanation
1	3	1	0	0,1	A cancelled booking allows a makeup booking but not a permanent booking.
2	2	0	1	1,0	A makeup booking takes up a space but a permanent booking is available**
3	2	1	1	1,1	A cancelled booking allows a makeup and the permanent space is still available.

\*\*Even though the class will show one permanent spot available it will only be able to be booked if overbooking is allowed by the site.

## Trials and Helds

*Switch (include Trials & held) off*

Booked	Held	Makeup	Vacancy	Explanation
2	1	0	<b>1</b>	Held does not take up a space so 1 space available
2	0	0	<b>1</b>	A permanent space available so booking is available
1	1	1 (MU/S* switch off)	<b>1</b>	A held does not take up a space but a make-up does, 1 space available
1	1	1(MU/S switch on)	<b>2,1</b>	A held does not take up a space, but a makeup takes up a temporary spot so 2 permanent spaces available and one makeup.**

\*Makeups/Suspensions

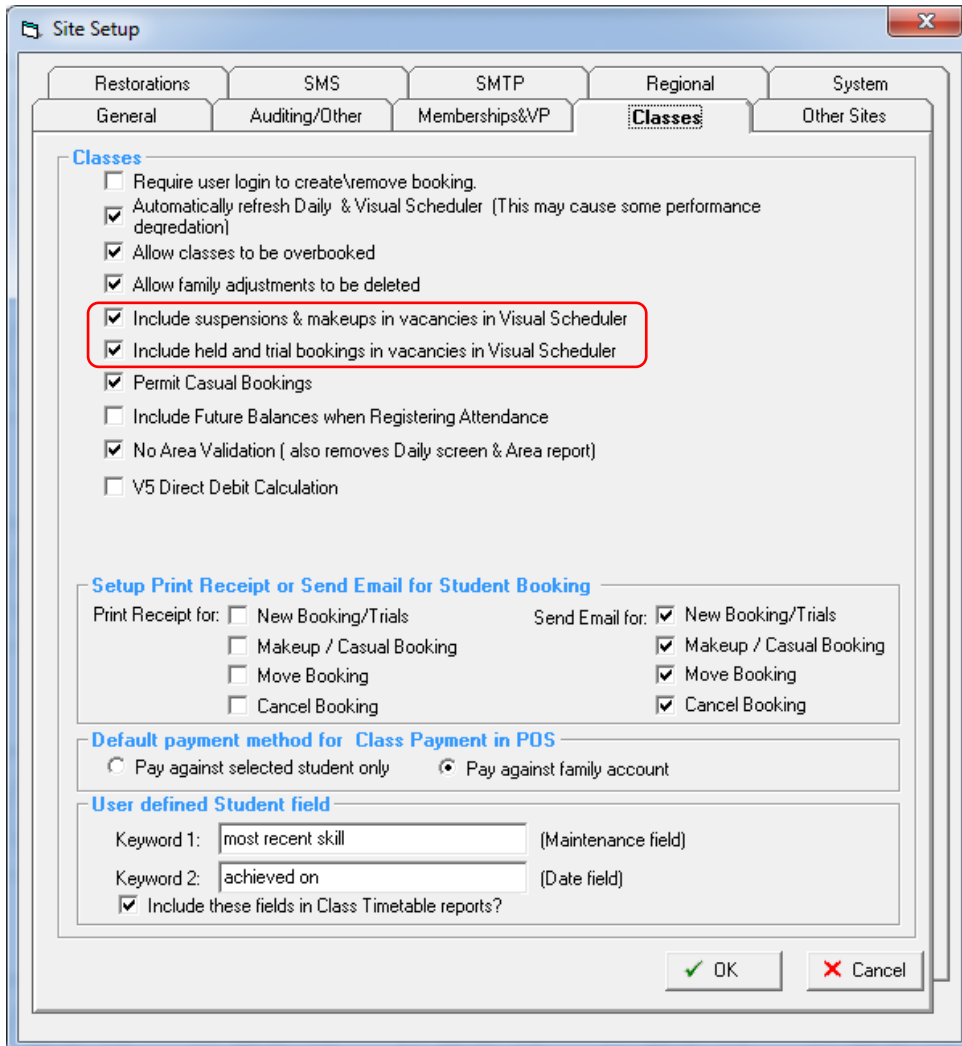
\*\*Although displaying 2 vacancies, one of the permanent spaces will only be available to be booked if the centre allows overbooking of classes.

*Switch (include Trials & held) on*

Booked	Held	Makeup	Vacancy	Explanation
2	1	0	<b>0</b>	The held takes up a space so no bookings available
2	0	0	<b>1</b>	With no held there is a permanent space available
1	1	1 (switch off)	<b>0</b>	The held & makeup take a space each so no spaces available.
1	1	1 (switch on)	<b>1,0</b>	The held takes a space and the makeup leaves a permanent space available. However it leaves no temporary spaces available.**

\*\*Although displaying 1 vacancy, the permanent space will only be available to be booked if the centre allows overbooking of classes.

The area for turning the switches off and on can be found under **Admin> Site> Site Setup> Classes:**



**Site Setup**

Restorations    SMS    SMTP    Regional    System

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

**Classes**

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

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

Print Receipt for:  New Booking/Trials    Send Email for:  New Booking/Trials

Makeup / Casual Booking     Makeup / Casual Booking

Move Booking     Move Booking

Cancel Booking     Cancel Booking

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

Pay against selected student only     Pay against family account

**User defined Student field**

Keyword 1:  (Maintenance field)

Keyword 2:  (Date field)

Include these fields in Class Timetable reports?

OK    Cancel

## classweb.link

After a successful trial period of classweb.link, Version 9 now brings you a more advanced version of classweb.link. This version includes numerous bug fixes and minor changes as well as;

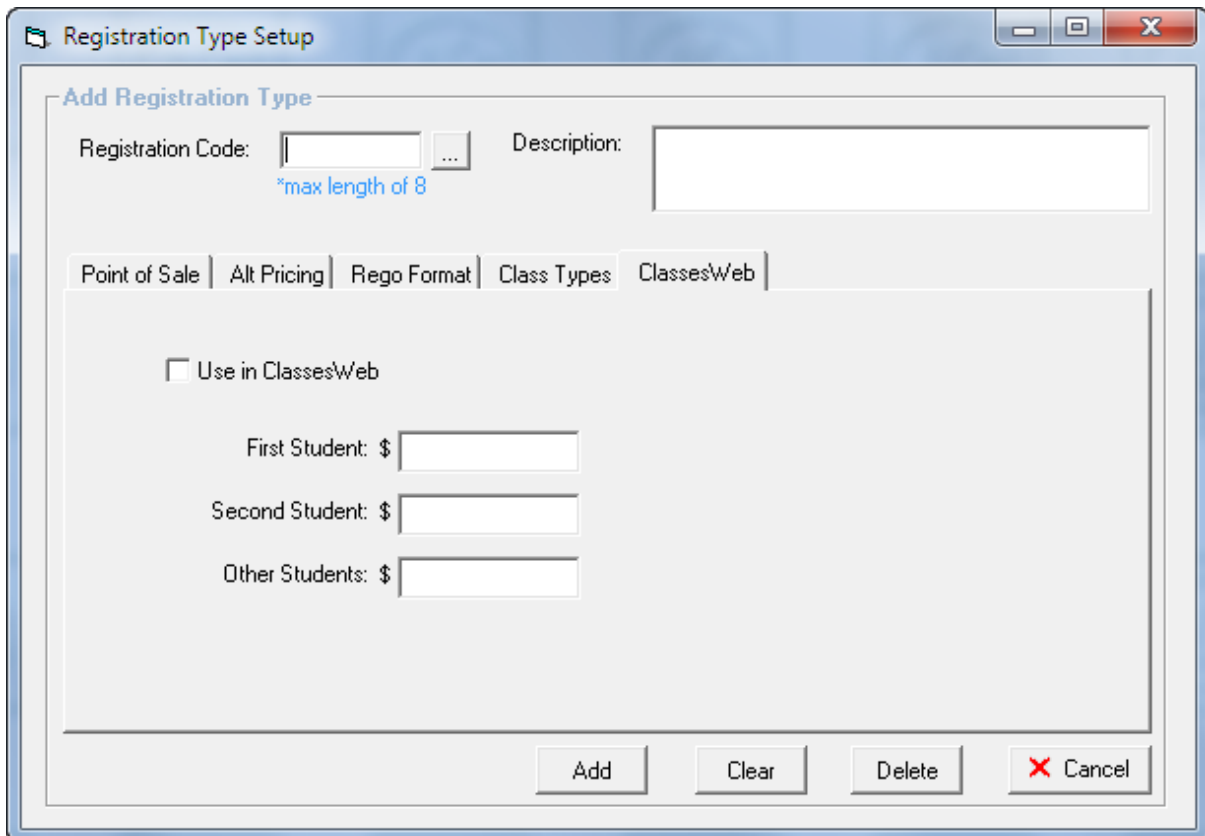
- Discount recognition
- Student & Family Registration Fees
- Ability to update Direct Debit Details online
- New User interface for easier navigation
- Smarter future booking features
- Double transaction processing protection
- Authenticity signature options including removal of captcha

To view the changes and have a live operation of classweb.link please visit [www.linksmodularsolutions.com/classesweb](http://www.linksmodularsolutions.com/classesweb)

## Setting up registration fees

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

Admin>Classes>RegistrationTypes



**Registration Type Setup**

**Add Registration Type**

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

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

Use in ClassesWeb

First Student: \$

Second Student: \$

Other Students: \$

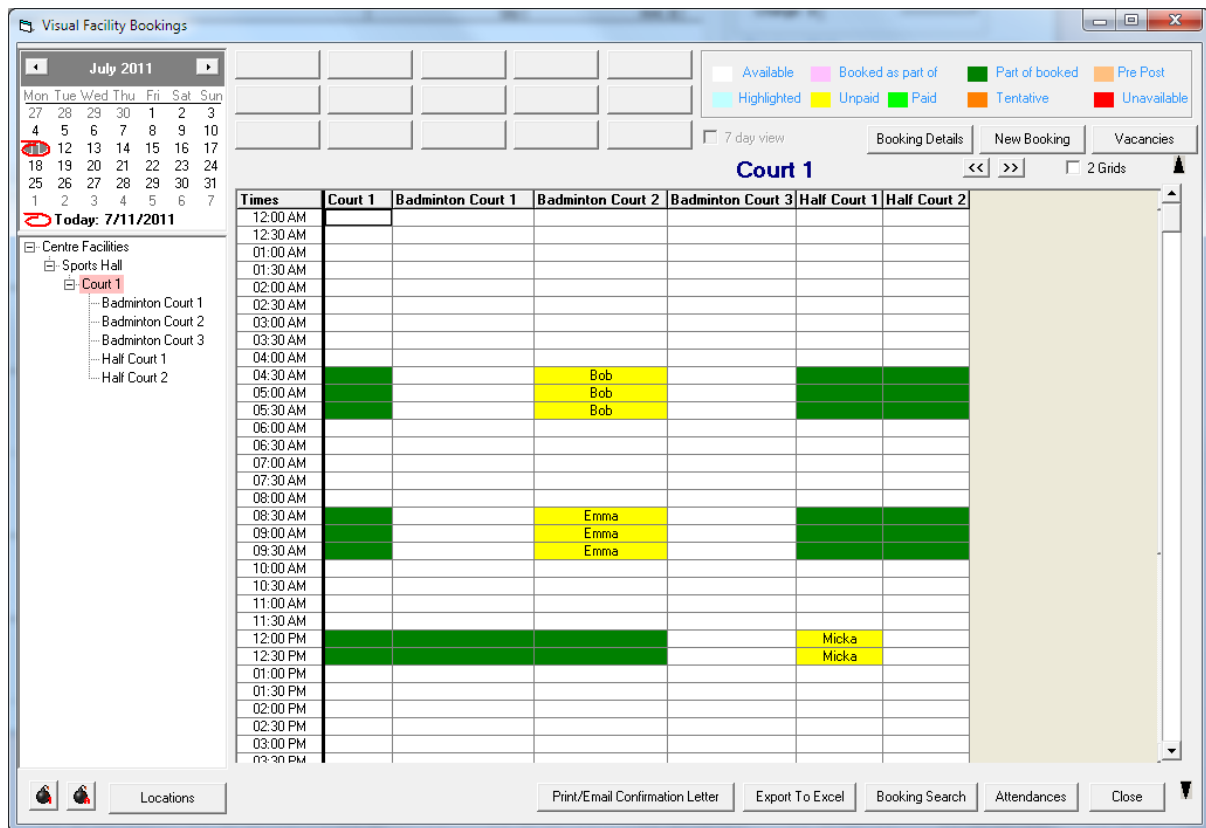
Add    Clear    Delete    **X** Cancel

## facility.link

### Co Relationship Facilities

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

Users can now assign the Badminton Court 2 to both half courts. To do this your facilities can simply be setup like seen below

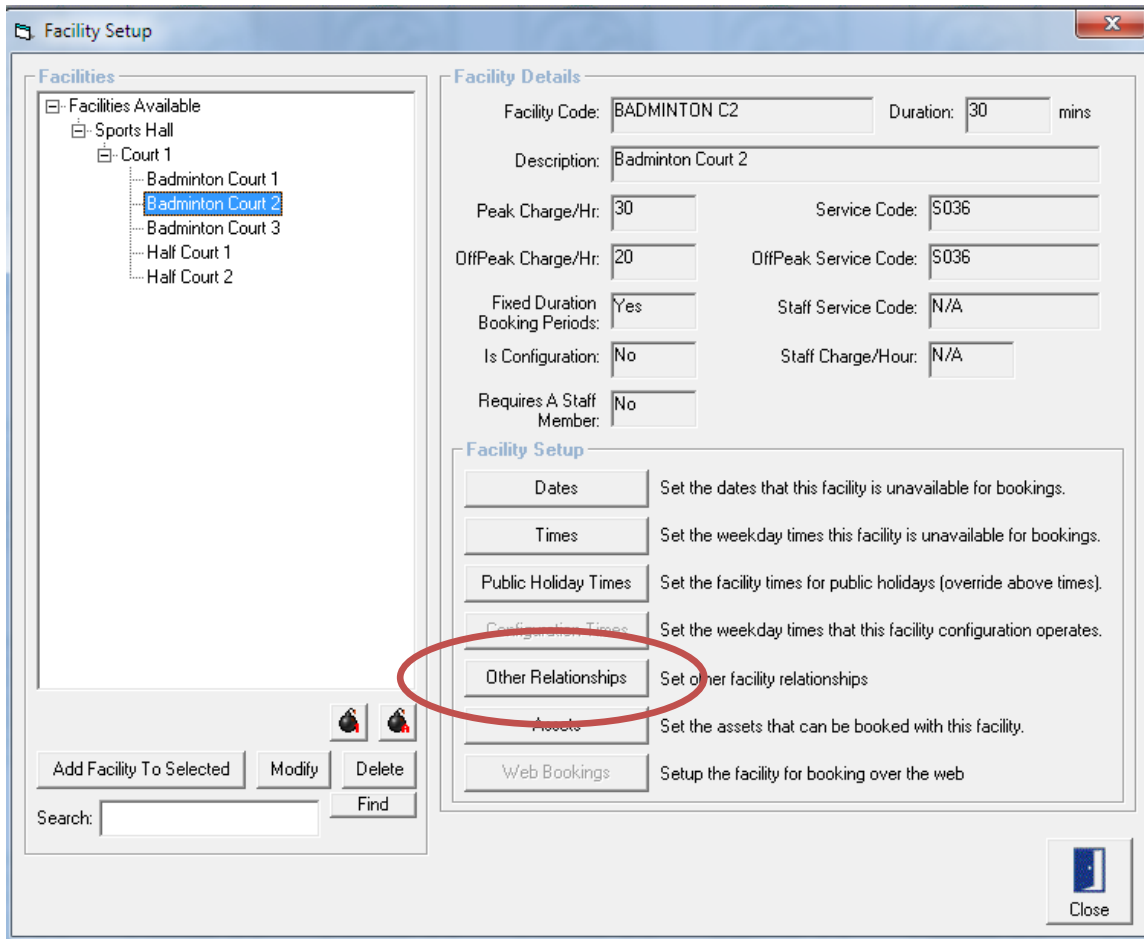


The screenshot shows the 'Visual Facility Bookings' application window. It features a calendar for July 2011, a legend for booking statuses, and a main booking grid for 'Court 1'. The grid columns represent different facility configurations: Court 1, Badminton Court 1, Badminton Court 2, Badminton Court 3, Half Court 1, and Half Court 2. The rows represent time slots from 12:00 AM to 03:30 PM. Bookings are shown as colored blocks with names like Bob, Emma, and Micka. The interface includes navigation buttons like 'Booking Details', 'New Booking', and 'Vacancies', and a sidebar for facility selection.

Times	Court 1	Badminton Court 1	Badminton Court 2	Badminton Court 3	Half Court 1	Half Court 2
12:00 AM						
12:30 AM						
01:00 AM						
01:30 AM						
02:00 AM						
02:30 AM						
03:00 AM						
03:30 AM						
04:00 AM						
04:30 AM	Part of booked		Unpaid		Part of booked	Part of booked
05:00 AM	Part of booked		Unpaid		Part of booked	Part of booked
05:30 AM	Part of booked		Unpaid		Part of booked	Part of booked
06:00 AM						
06:30 AM						
07:00 AM						
07:30 AM						
08:00 AM						
08:30 AM	Part of booked		Unpaid		Part of booked	Part of booked
09:00 AM	Part of booked		Unpaid		Part of booked	Part of booked
09:30 AM	Part of booked		Unpaid		Part of booked	Part of booked
10:00 AM						
10:30 AM						
11:00 AM						
11:30 AM						
12:00 PM	Part of booked		Part of booked		Unpaid	Unpaid
12:30 PM	Part of booked		Part of booked		Unpaid	Unpaid
01:00 PM						
01:30 PM						
02:00 PM						
02:30 PM						
03:00 PM						
03:30 PM						

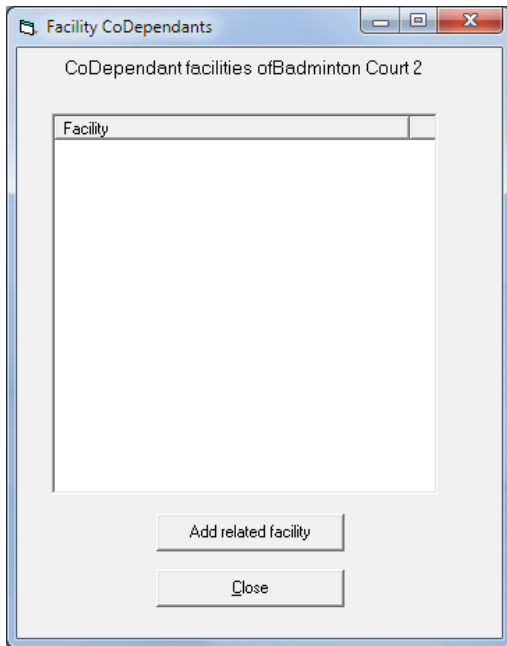
To assign the co relationships you will need to go to Admin>Facility>SetupFacilities

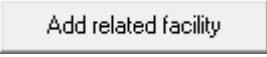
1. Click on facility you wish to assign
2. Click on Other relationships

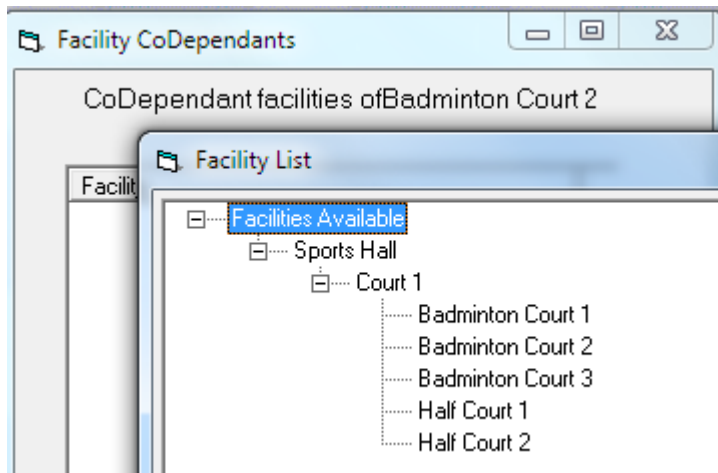


The screenshot shows the 'Facility Setup' window. On the left, a tree view under 'Facilities Available' shows 'Sports Hall' > 'Court 1' > 'Badminton Court 2' selected. The main area is divided into 'Facility Details' and 'Facility Setup'. The 'Facility Details' section contains fields for Facility Code (BADMINTON C2), Duration (30 mins), Description (Badminton Court 2), Peak Charge/Hr (30), Service Code (S036), OffPeak Charge/Hr (20), OffPeak Service Code (S036), Fixed Duration Booking Periods (Yes), Staff Service Code (N/A), Is Configuration (No), Staff Charge/Hour (N/A), and Requires A Staff Member (No). The 'Facility Setup' section contains several buttons: 'Dates', 'Times', 'Public Holiday Times', 'Configuration Times', 'Other Relationships', 'Assets', and 'Web Bookings'. The 'Other Relationships' button is circled in red. At the bottom left, there are buttons for 'Add Facility To Selected', 'Modify', 'Delete', and 'Find', along with a search field. A 'Close' button is at the bottom right.

3. The following screen will appear



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



Other examples of where co relationships may be used are;

1. Booking the entire pool also books the PA System and Podiums at no additional cost
2. Booking Lanes 1-3 automatically make Lane 4 unavailable for Booking
3. A volleyball court in the middle of a netball court makes both half courts unavailable

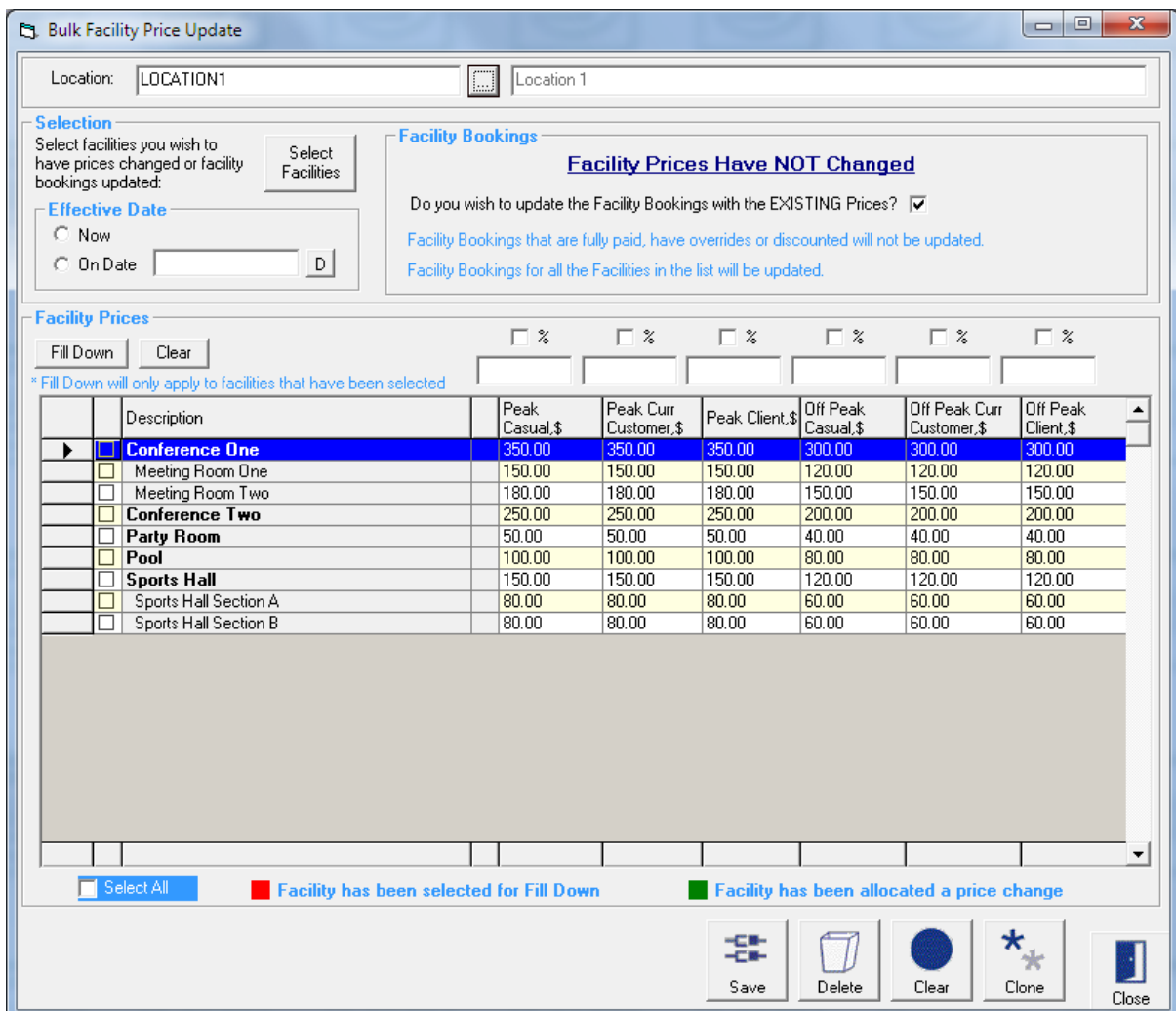
## Bulk Facility Price Update

A bulk price update screen is now available for Facilities. This screen works similar to the Products Bulk Price update and the Classes Bulk Price update. It allows you to alter the facility prices in bulk including the override amounts.

Admin>Facility>BulkFacilityPriceUpdate

This screen allows you to update in bulk the standard prices for your facilities. You can choose to update prices effective immediately or at a certain date. You can also update the price of any booking already made that falls after the price update date.

You can enter a price in the box above the row and tick/check the boxes on the left to choose which facilities the price applies to. Pressing Fill Down will then apply the price to the selected rows. Alternatively you can enter prices manually in the chosen cells.



Location: LOCATION1 Location 1

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

**Effective Date**  
 Now  
 On Date  D

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

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

	Description	Peak Casual,\$	Peak Curr Customer,\$	Peak Client,\$	Off Peak Casual,\$	Off Peak Curr Customer,\$	Off Peak Client,\$
<input checked="" type="checkbox"/>	<b>Conference One</b>	350.00	350.00	350.00	300.00	300.00	300.00
<input type="checkbox"/>	Meeting Room One	150.00	150.00	150.00	120.00	120.00	120.00
<input type="checkbox"/>	Meeting Room Two	180.00	180.00	180.00	150.00	150.00	150.00
<input type="checkbox"/>	<b>Conference Two</b>	250.00	250.00	250.00	200.00	200.00	200.00
<input type="checkbox"/>	<b>Party Room</b>	50.00	50.00	50.00	40.00	40.00	40.00
<input type="checkbox"/>	<b>Pool</b>	100.00	100.00	100.00	80.00	80.00	80.00
<input type="checkbox"/>	<b>Sports Hall</b>	150.00	150.00	150.00	120.00	120.00	120.00
<input type="checkbox"/>	Sports Hall Section A	80.00	80.00	80.00	60.00	60.00	60.00
<input type="checkbox"/>	Sports Hall Section B	80.00	80.00	80.00	60.00	60.00	60.00

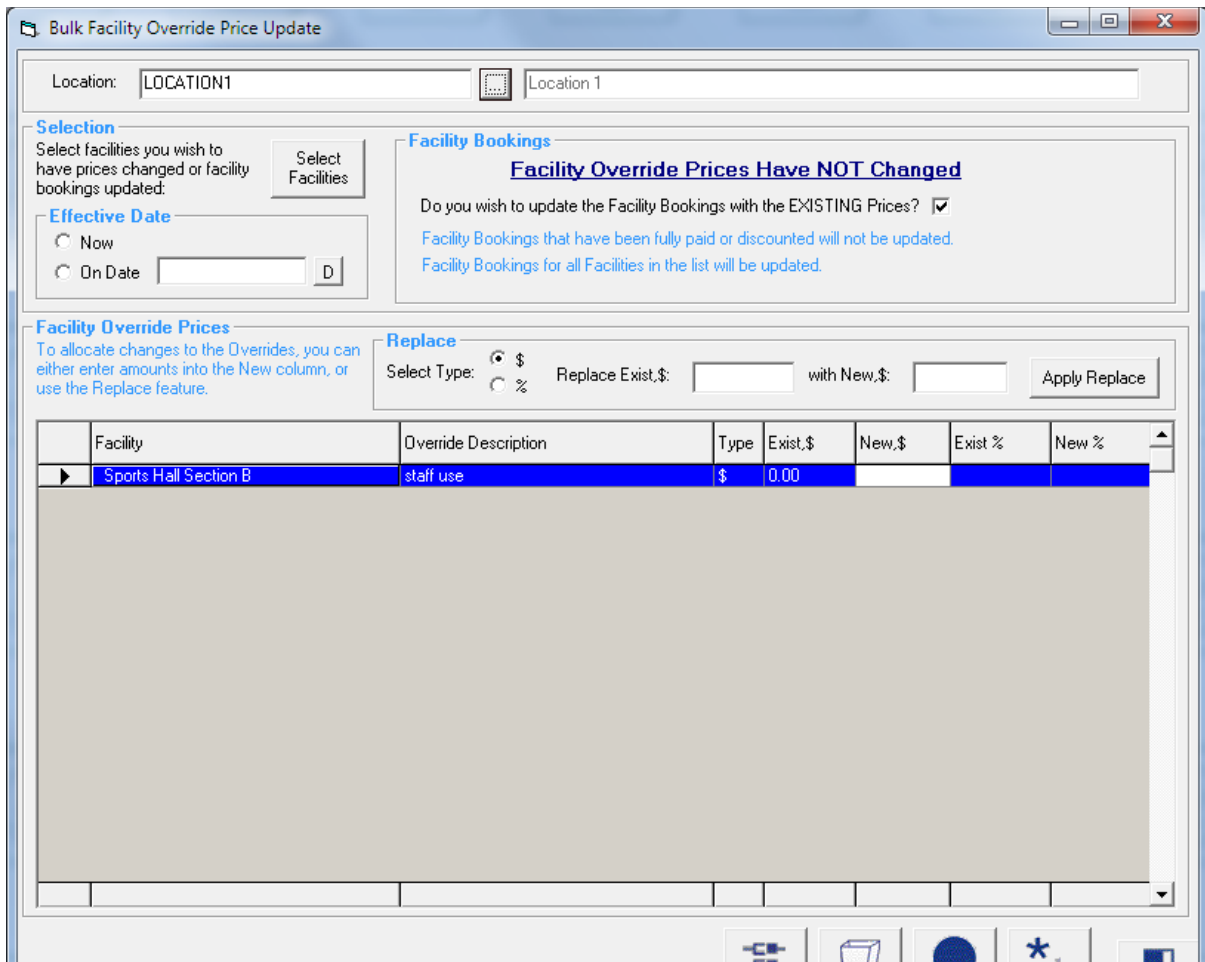
Select All     Facility has been selected for Fill Down     Facility has been allocated a price change



## Bulk Facility Override Price Update

Much similar to the bulk facility price update this screen will allow you to update the prices for any set overrides you have in place. The screen operates in the exact same format as the Bulk Facility Price Update.

Admin>Facility>BulkFacilityOverridePriceUpdate



Location: LOCATION1 Location 1

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

**Effective Date**  
 Now  
 On Date  D

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

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

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

Facility	Override Description	Type	Exist,\$	New,\$	Exist %	New %
Sports Hall Section B	staff use	\$	0.00			

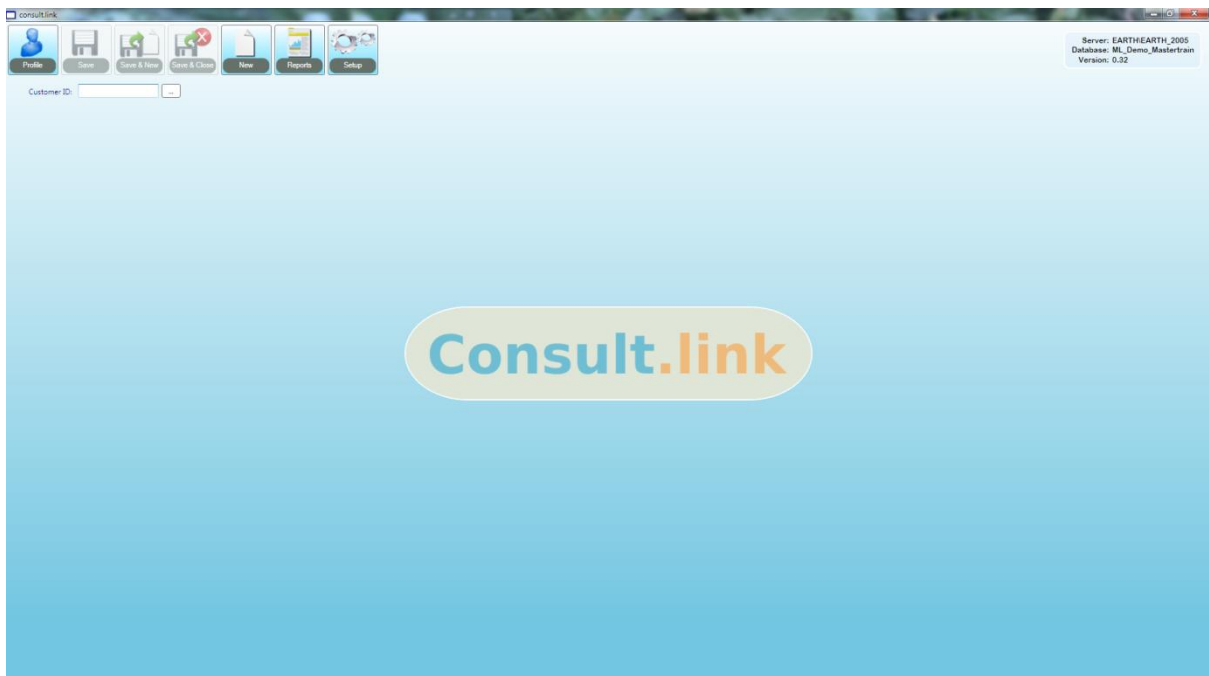


## consult.link Overview

Consult.link is now available for installation with Version 9. This module runs as a separate application and Links is not required on a machine for it to work. This means that it can be installed on Health Club computers without the need for a Links installation.

Consult.link tracks member assessments and is able to record a range of information from Health Questions through to Measurements. You can download a copy of the user manual from [www.lmsdownloads.com/documents/consultUserManual.zip](http://www.lmsdownloads.com/documents/consultUserManual.zip)

For further information on the purchase of consult.link please contact the Sales team on 03 9938 4567 or via [lms@linksmodularsolutions.com](mailto:lms@linksmodularsolutions.com)



## e-blast.link overview

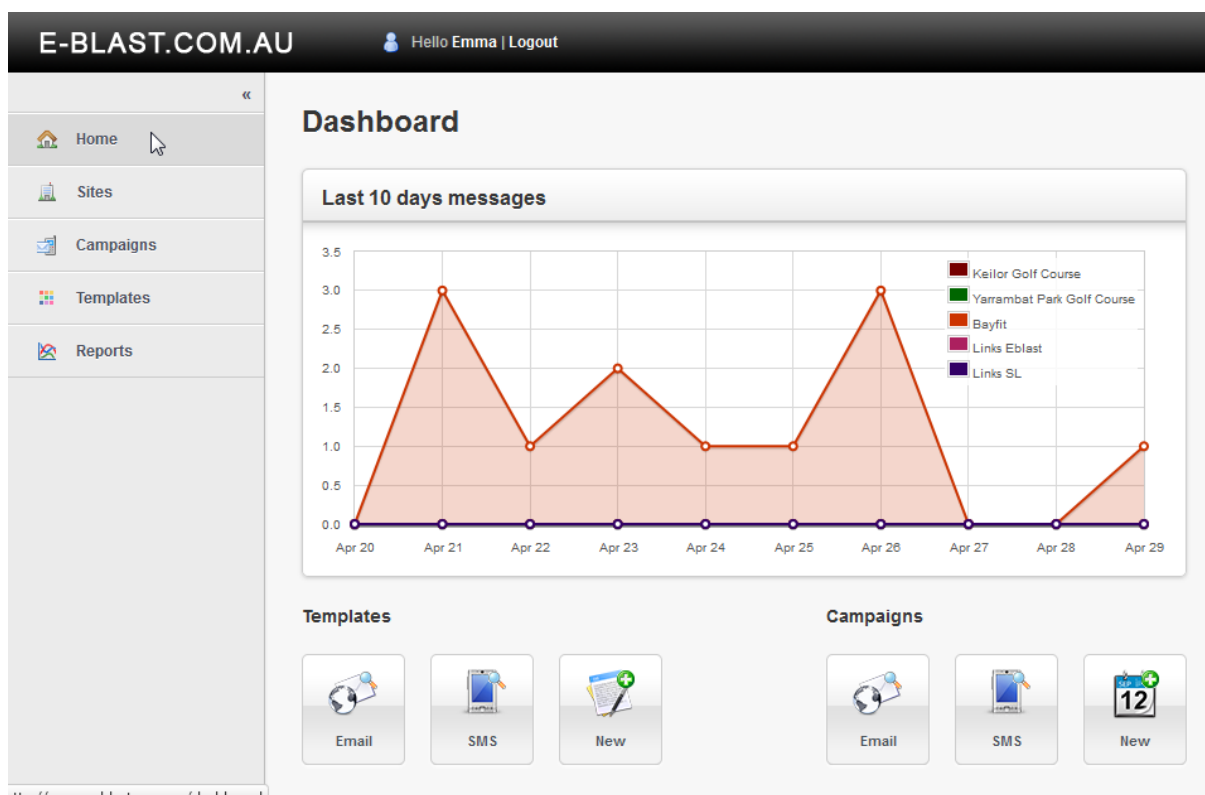
e-blast.link is the latest module of the Links Modular Solutions suite. A completely web based product it is available in Stage 1 for Members and Prospects.

e-blast.link is an extremely effective internet-based software program that allows marketing and promotional material to be personalised and delivered to the mobile phones and emails of members, prospects and customers linked to a current database. This software program provides a major advantage by allowing the development of marketing campaigns and promotions to be automated in advance to make it effortless.

Templates can be designed including pictures, animation, hyperlinks and our course the all important text. You can also create MMS templates within the system. Once you have templates created these can be assigned to your customised campaigns including welcome letters, expiry letters and birthday correspondence. The setup and leave format of e-blast.link means that you can do away with manual workloads allowing your staff more time to focus on what really matters.

For a demonstration of e-blast.link please call 03 9938 4567 or visit [www.linkscloud.com.au](http://www.linkscloud.com.au)

If you would like to order e-blast.link please visit <http://linksmodularsolutions.com/e-blast.link>





## Techno Gym Interface

With the advent of the Links Export Service, clients currently or wishing to use TechnoGym Wellness Systems in their Facilities can employ the use of this service to create seamless customer data replication between both the Links and Technogym platforms.

Customer Service Offers and Membership Consultants can now enter client details into Links and have them exported into the Wellness System ready to have their specialised programs written in just minutes.

For further information on incorporating the Links Export Service into your site please contact our Sales team on 03 9938 4567 or email [lms@linksmodularsolutions.com](mailto:lms@linksmodularsolutions.com)



## kiosk.link Overview

The release of Version 9 coincides with that of a more feature rich kiosk.link, now capable of both membership and visit pass purchase and payment and casual visit sales, through cash, EFT and credit tenders. In addition to existing group fitness class purchases, members can also now update their address and contact information, all from the kiosk terminal.

For further information on how kiosk.link can improve and streamline member transactions please contact our Sales team on 03 9938 4567 or email [lms@linksmodularsolutions.com](mailto:lms@linksmodularsolutions.com)



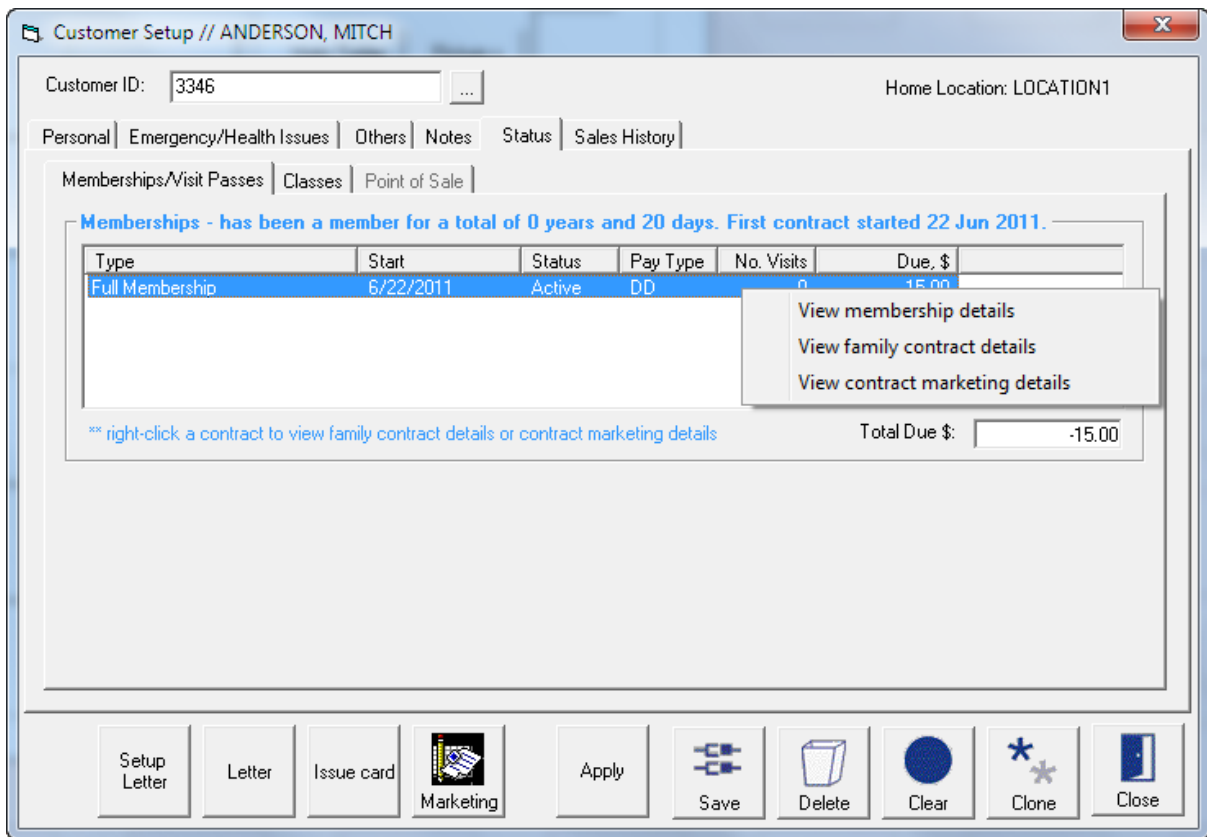
## **memweb.link**

Online purchasing of memberships is now the latest web module to be developed by Links Modular Solutions. Working in real time with your Links database, users can choose which memberships are available for purchase via their website. Payments are cleared and deposited to your nominated bank account, and member records and transactions updated to your database automatically. Literally members can join your club anytime day or night with no additional work for end users.

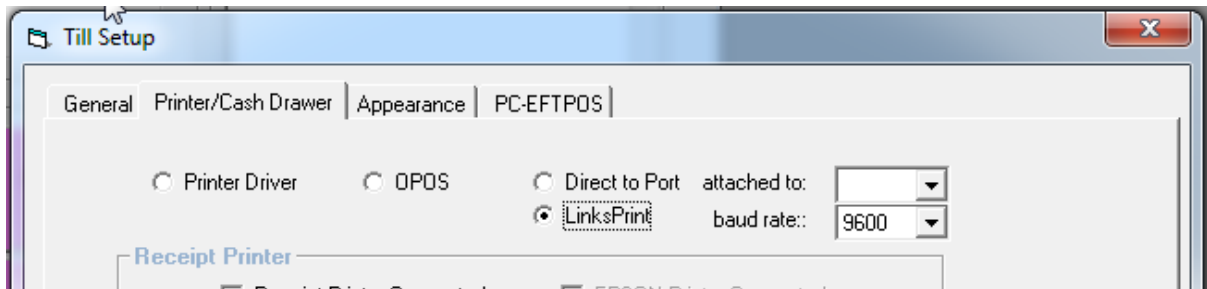
For further information on memweb.link please contact our Sales team on 03 9938 4567 or email [lms@linksmodularsolutions.com](mailto:lms@linksmodularsolutions.com)

### Customer Screen enhancements

You can now access the Membership Contracts and Visit Pass contracts screen from the Customer Screen. This quick link will assist customer service staff. This is done through a right click on the membership or visit pass in the Status tab.



## New Linksprint option



There is now a Linksprint option under Till Setup for large terminal services clients. This option prevents the print function from locking SQL through Links when using direct to port for printing.