

LEADERS IN LEISURE TECHNOLOGY



4 Courses – Administration

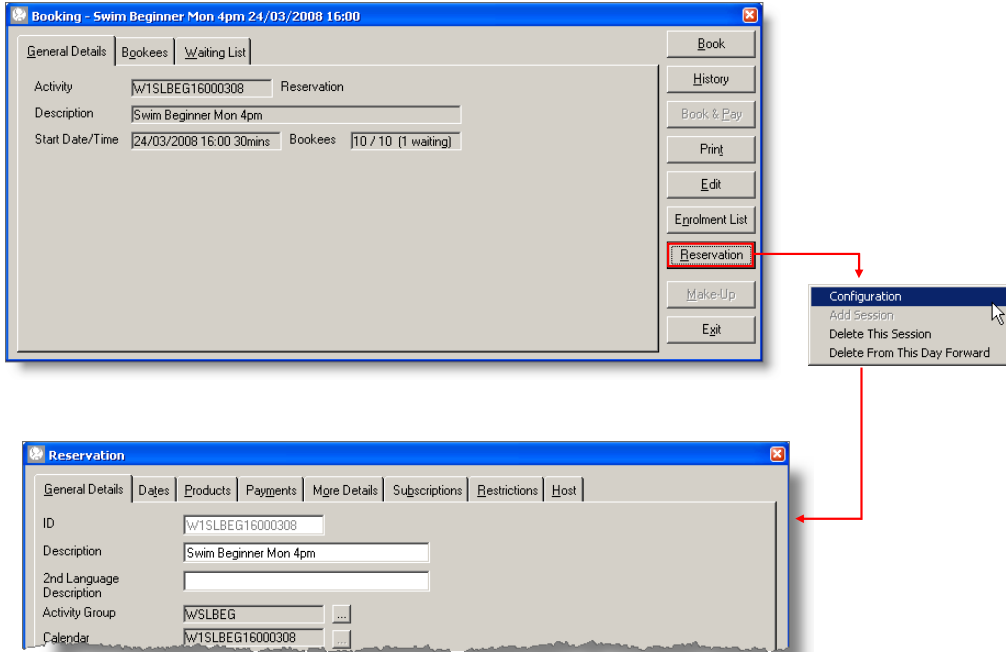
www.gladstonemrm.com



NOTES:

Administration of Courses

Your Site Configuration



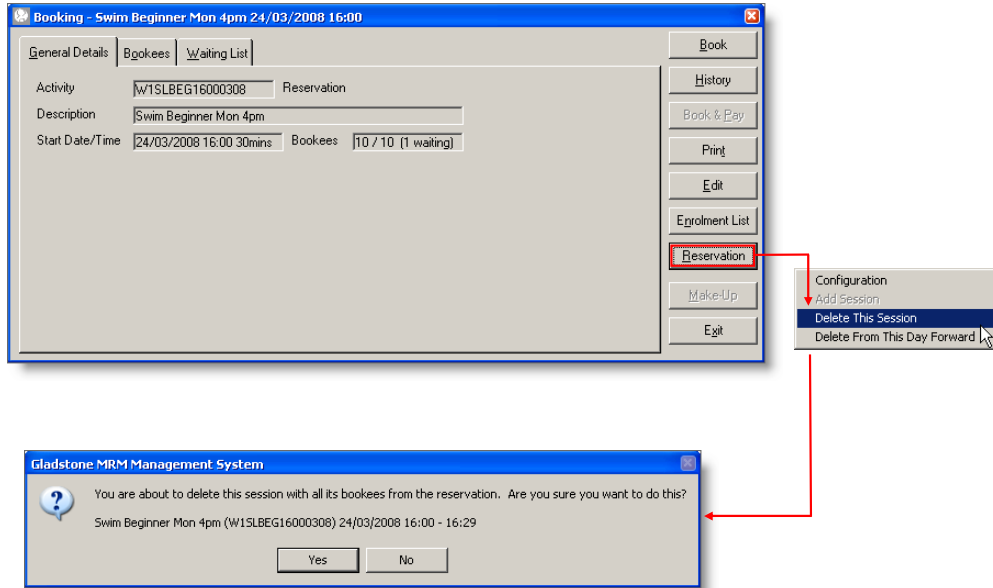
Add a Session

The function of Add a Session is only available when no customers are booked into the course.

NOTES:

Administration of Courses

Your Site Configuration



Delete This Session

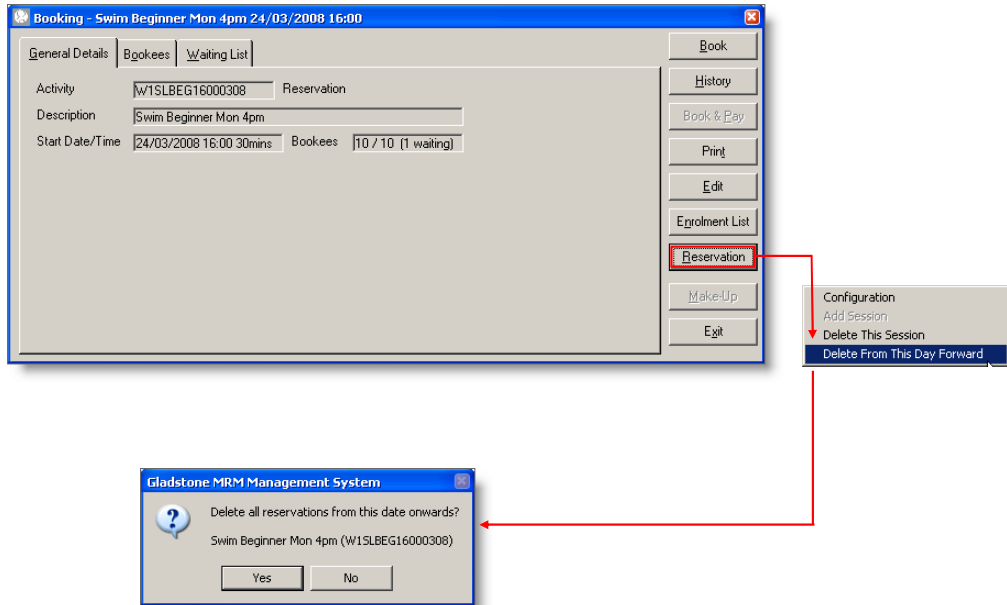
This will delete the session from the Booking Sheet. Click 'Yes' to the question 'You are about to delete this session with all its bookees from the reservation. Are you sure you want to do this?'

Note:- If there are Bookees on the course these will need to be cancelled and monies dealt with appropriately

NOTES:

Administration of Courses

Your Site Configuration

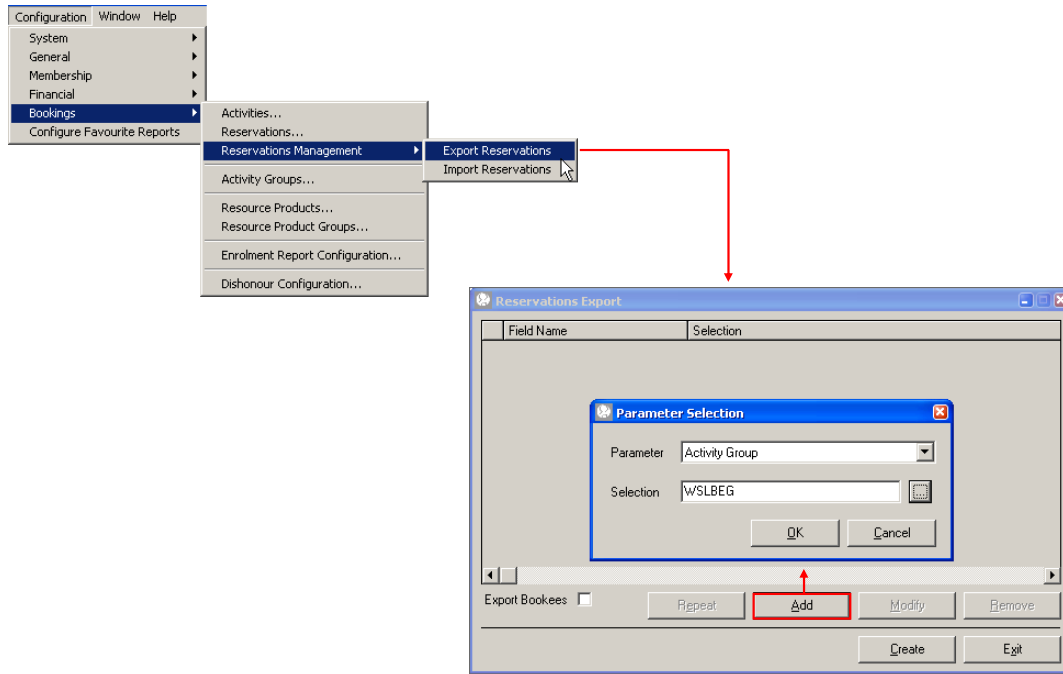


Delete From This Day Forward

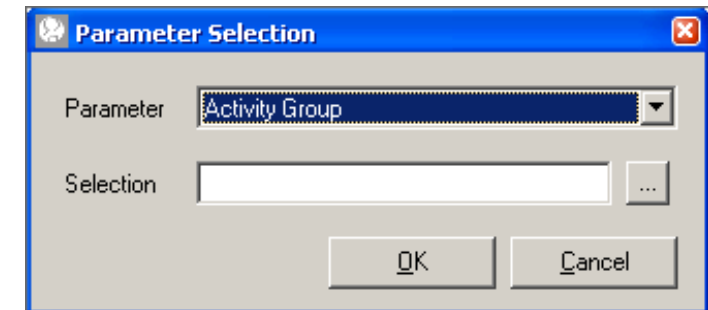
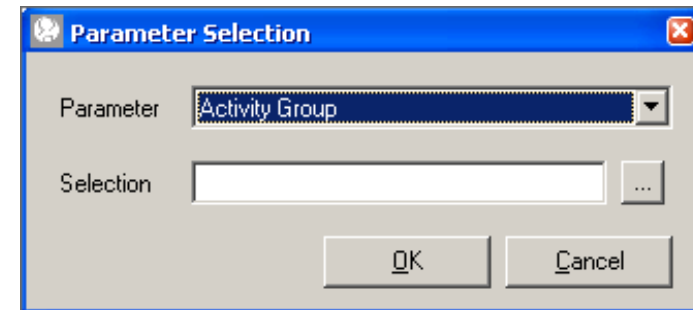
This allows the user to delete this and all following sessions of a course. Click 'Yes' to the question 'Delete all Reservations from this date onwards?'

NOTES:

Administration of Courses



Your Site Configuration



Create reservations using existing reservation data

Open the Configuration menu, choose Bookings, Reservations Management and select Export Reservations. This screen allows the user to select which reservations they wish to use as a basis for the new programme of courses.

Step 1 Click the **Add** button to select the reservations to be included in the file by all or any of the following parameters:-

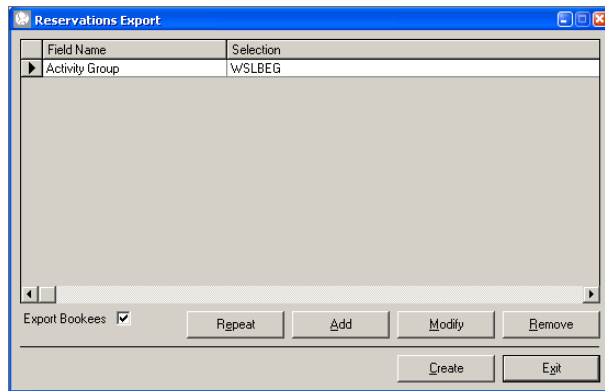
Activity Group - more than one Activity Group can be added.

Reservation Cut Off Date - the date must be one of the dates within the current reservation, so the export routine will pick up reservations that will end after the specified date.

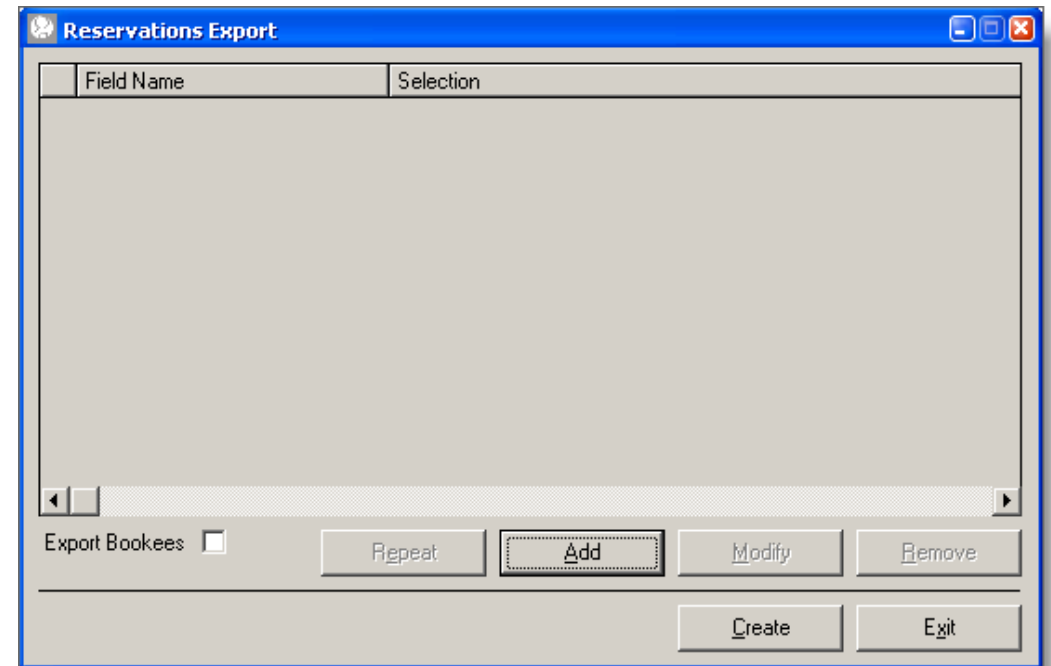
Reservation Site - a specified site or number of sites can be added.

NOTES:

Administration of Courses



Your Site Configuration

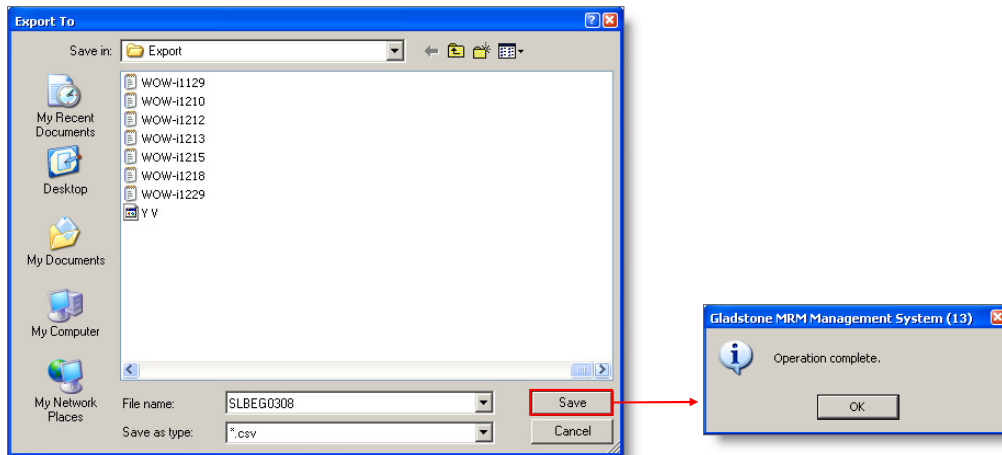


Step 2

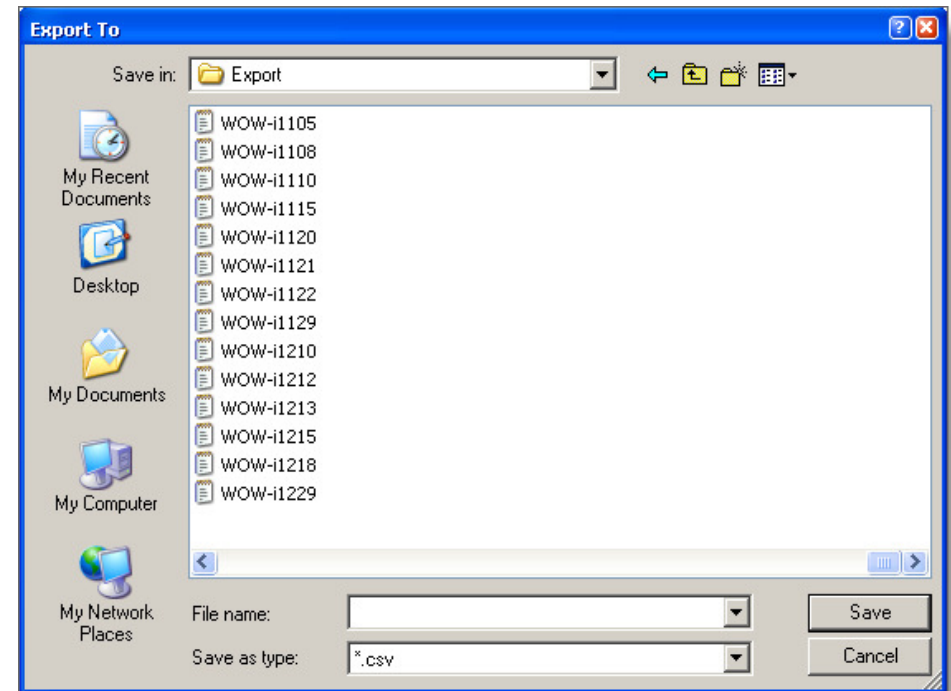
The user can export bookees by selecting the **Export Bookees** tick box. This will create an additional file containing the bookees within each reservation.

NOTES:

Administration of Courses



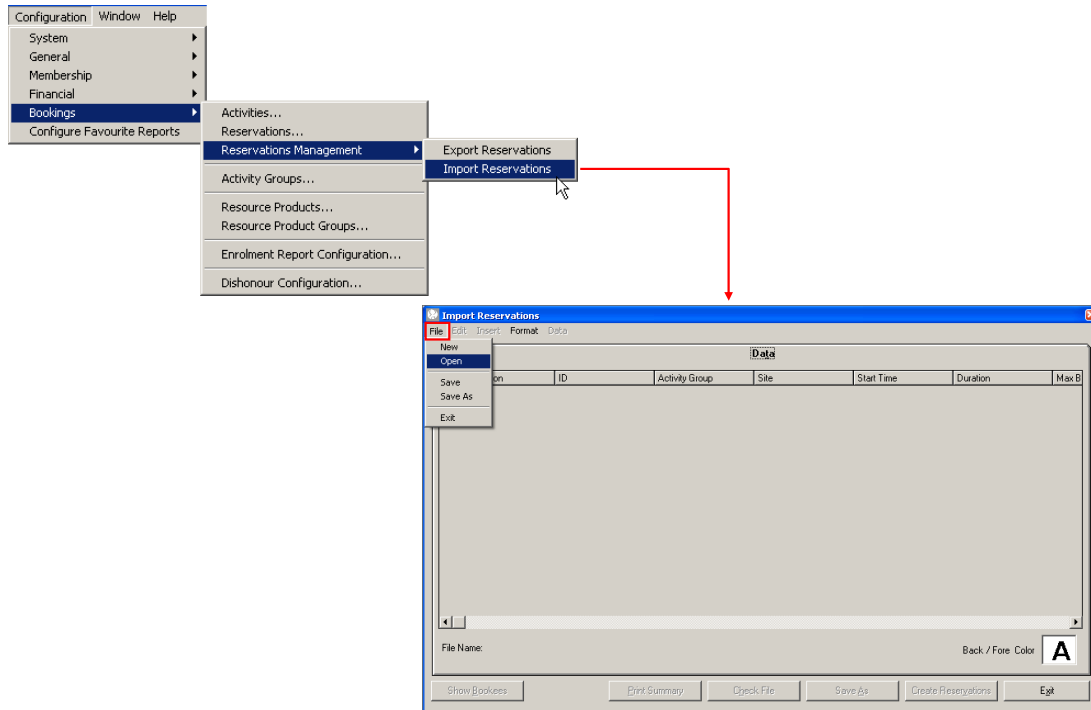
Your Site Configuration



- Step 3 Click the **Create** button to create the export file.
- Step 4 An Export To screen will appear, type a file name and save in the default export folder.
- Step 5 Click **Save** and message will appear 'Operation Complete'.
- Step 6 Click the OK button.

NOTES:

Administration of Courses



Your Site Configuration

Create new reservations

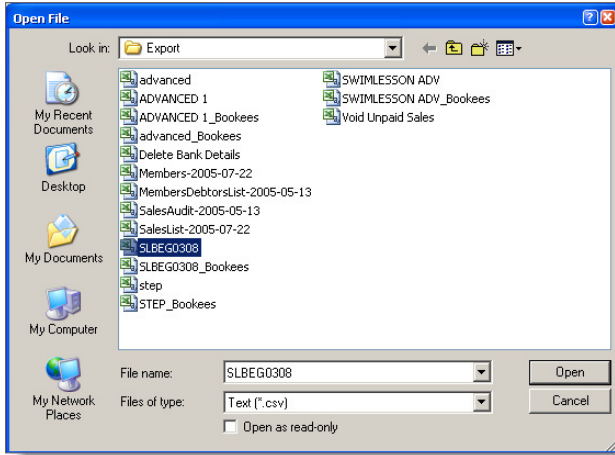
Open the Configuration menu, choose Bookings, Reservations Management and select Import Reservations. The Import Reservations screen is displayed. This screen allows the user to modify the parameters on a copy of existing reservations so that they can define the new requirements.

Step 1 Click File and select Open.

NOTES:

Administration of Courses

Your Site Configuration

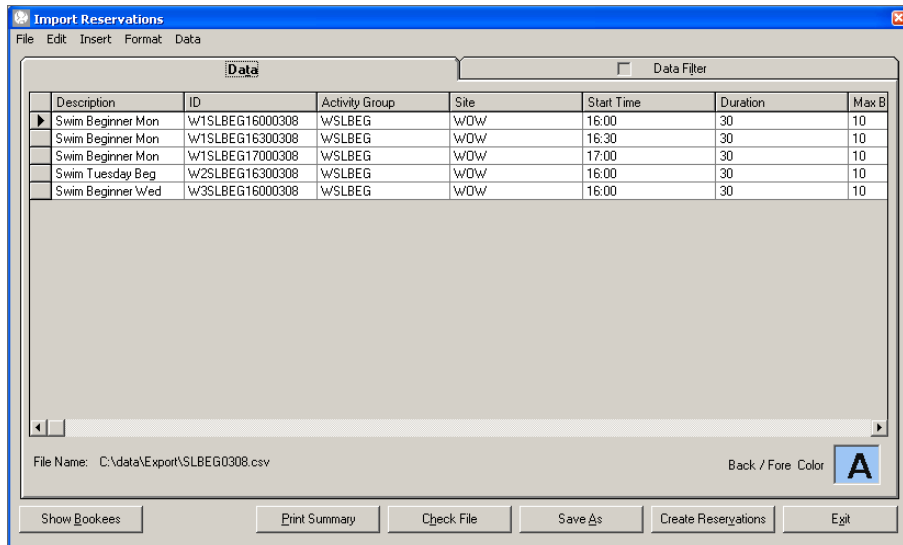


Step 2 Select the previously saved file.

NOTES:

Administration of Courses

Your Site Configuration



Step 3

The user can edit the information within the columns on the **Data** tab with the details for the new reservations using the Edit, Insert, Format and Data menus.

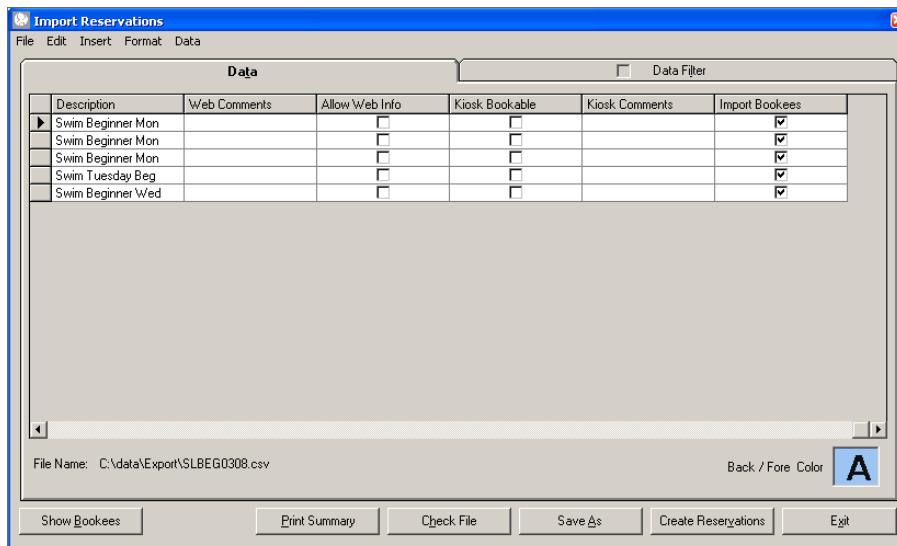
Note:- The three main columns that are essential to be edited are **ID**, **Start Date** and **End Date**. Other columns can be edited if required.

The user can reduce the reservations displayed on the screen by using the options on the **Data Filter** tab to sort reservations.

NOTES:

Administration of Courses

Your Site Configuration



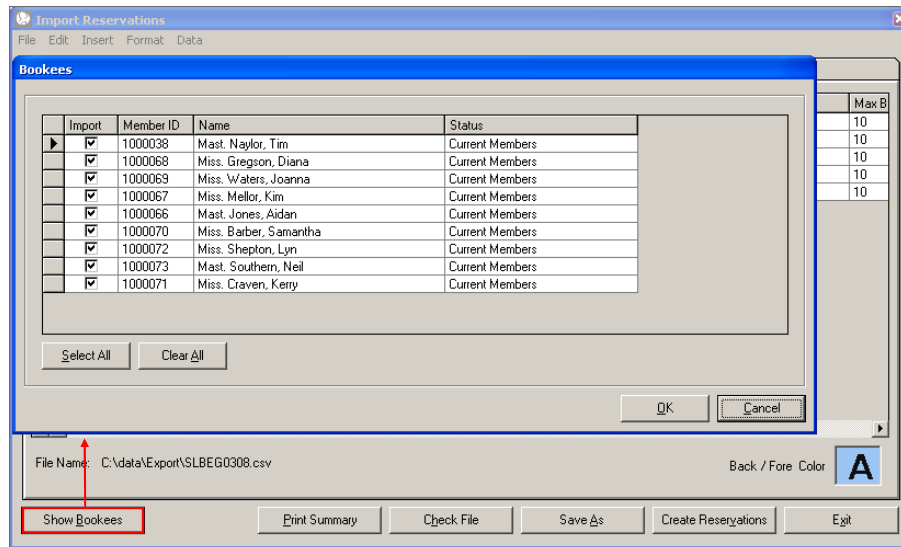
There is an Import Bookees column on the far right of the screen. This defaults to being ticked, on courses for which the bookees have been exported.

Clear the **Import Bookees** box if none of the bookees are to be imported into the new reservation.

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Administration of Courses

Your Site Configuration



If only some of the bookees are to be imported into the new reservation, the user can click **Show Bookees** to display a list of the bookees in the selected reservation.

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Administration of Courses

Your Site Configuration

Bookees

	Import	Member ID	Name	Status
<input type="checkbox"/>	<input type="checkbox"/>	1000038	Mast, Naylor, Tim	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000068	Miss, Gregson, Diana	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000069	Miss, Waters, Joanna	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000067	Miss, Mellor, Kim	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000066	Mast, Jones, Aidan	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000070	Miss, Barber, Samantha	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000072	Miss, Shepton, Lyn	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000073	Mast, Southern, Neil	Current Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1000071	Miss, Craven, Kerry	Current Members

Select All Clear All

OK Cancel

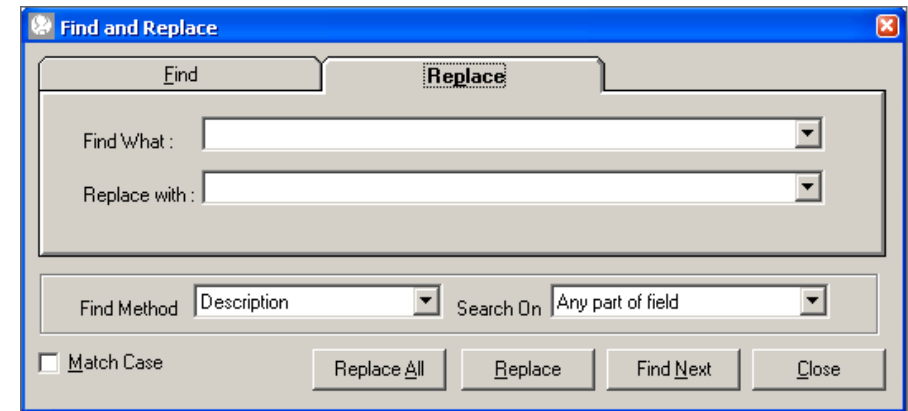
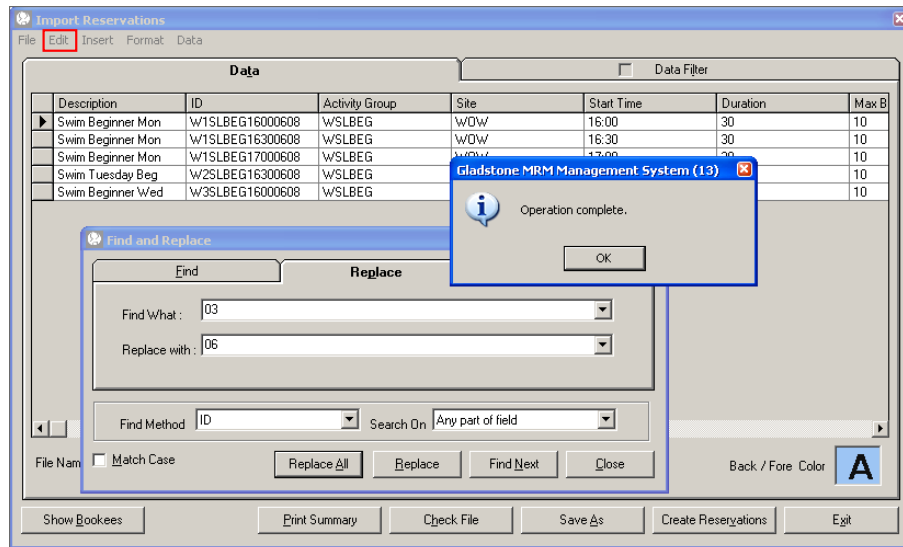
The user can **Select All**, **Clear All** or clear the **Import** tick box for an individual. The selected bookees will be imported with the reservation.

Note:- Non member bookees cannot be included in the export file.

NOTES:

Administration of Courses

Your Site Configuration



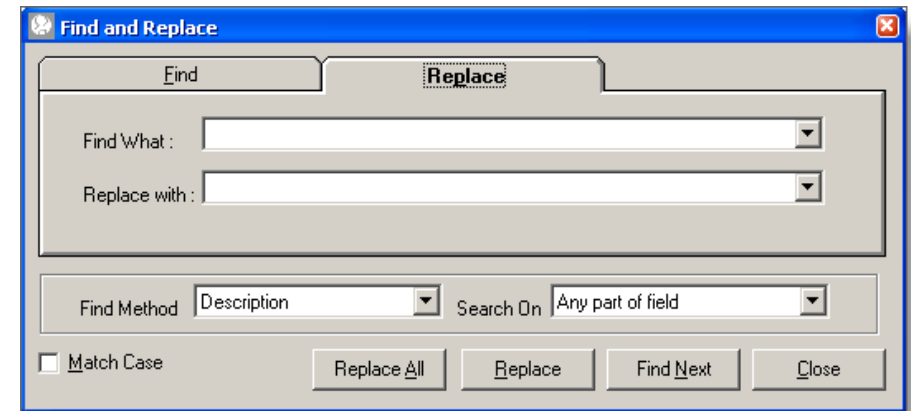
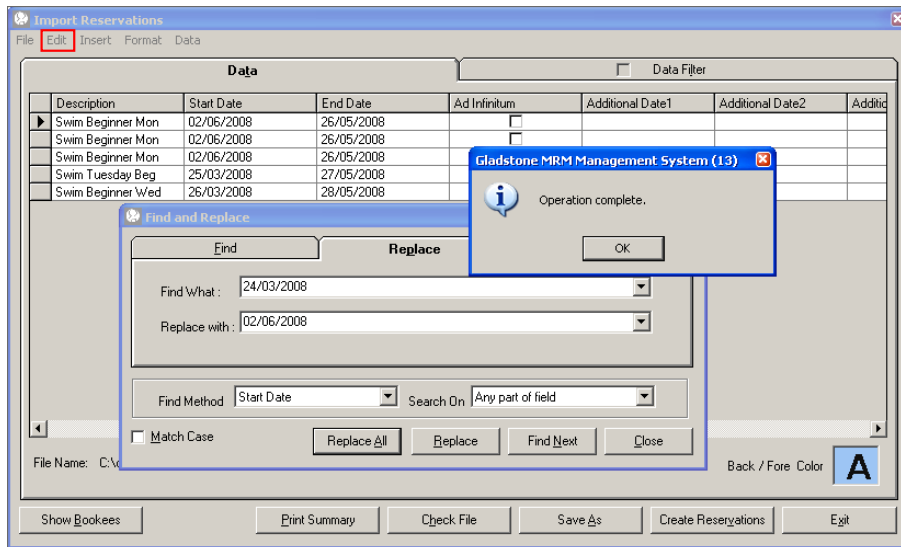
The user can use **Replace** from the Edit menu to **Find and Replace** any information in any of the field columns.

In **Find Method** choose ID to make changes to the course ID field.

NOTES:

Administration of Courses

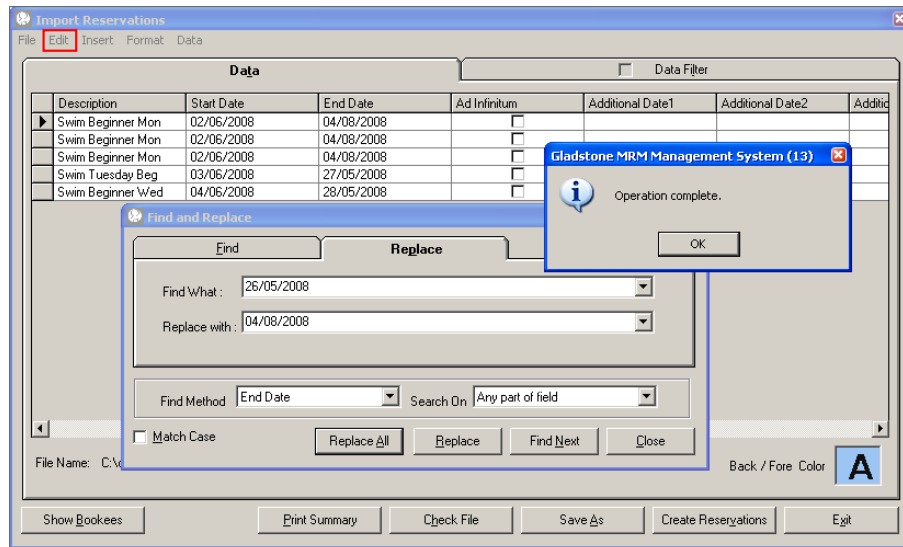
Your Site Configuration



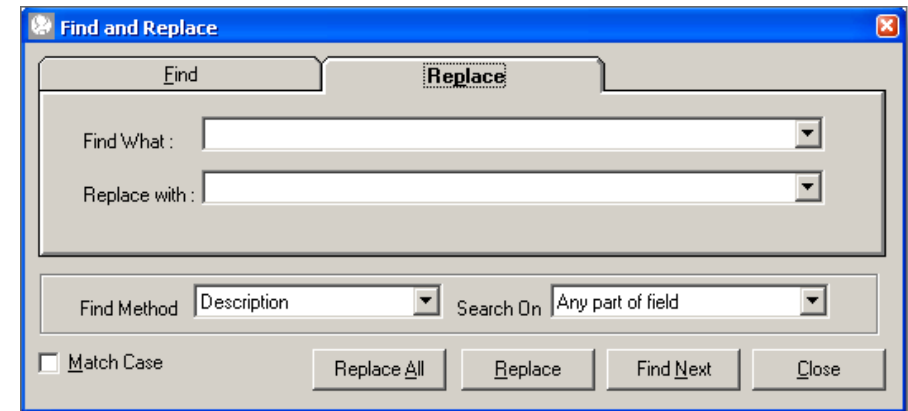
In **Find Method** choose **Start Date** to make changes to the course start date field.

NOTES:

Administration of Courses



Your Site Configuration

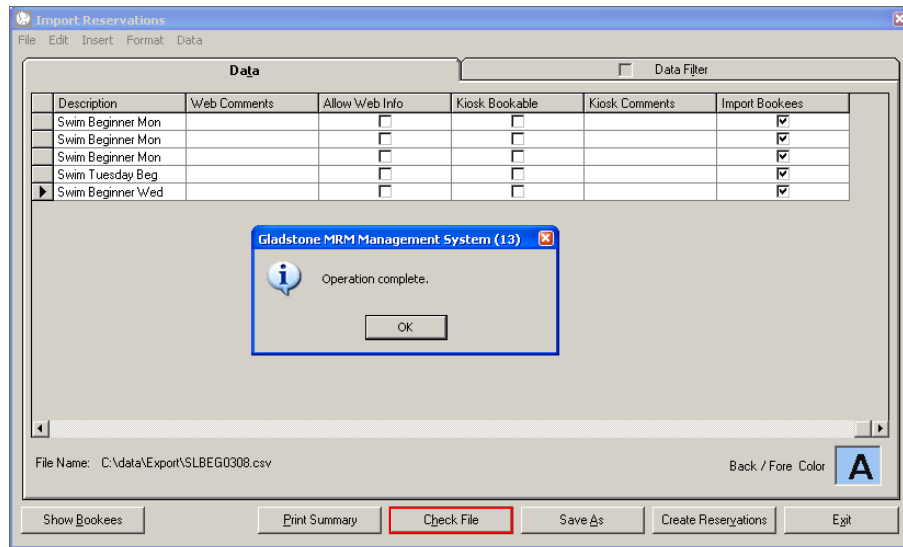


In **Find Method** choose **End Date** to make changes to the course end date field.

NOTES:

Administration of Courses

Your Site Configuration



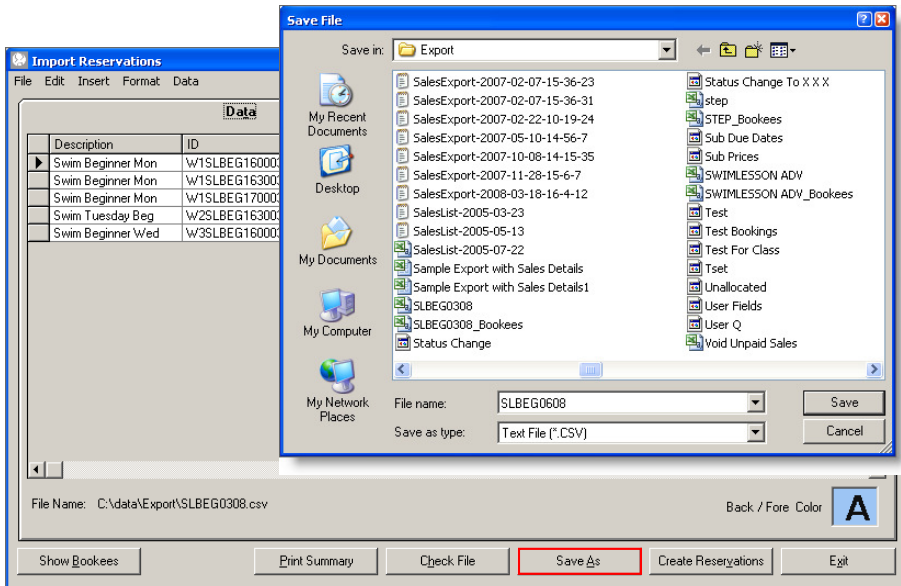
Step 4

Click the **Check File** button to validate the information the user has put in. The system will check for duplicate reservation IDs, missing data and any double bookings in the file.

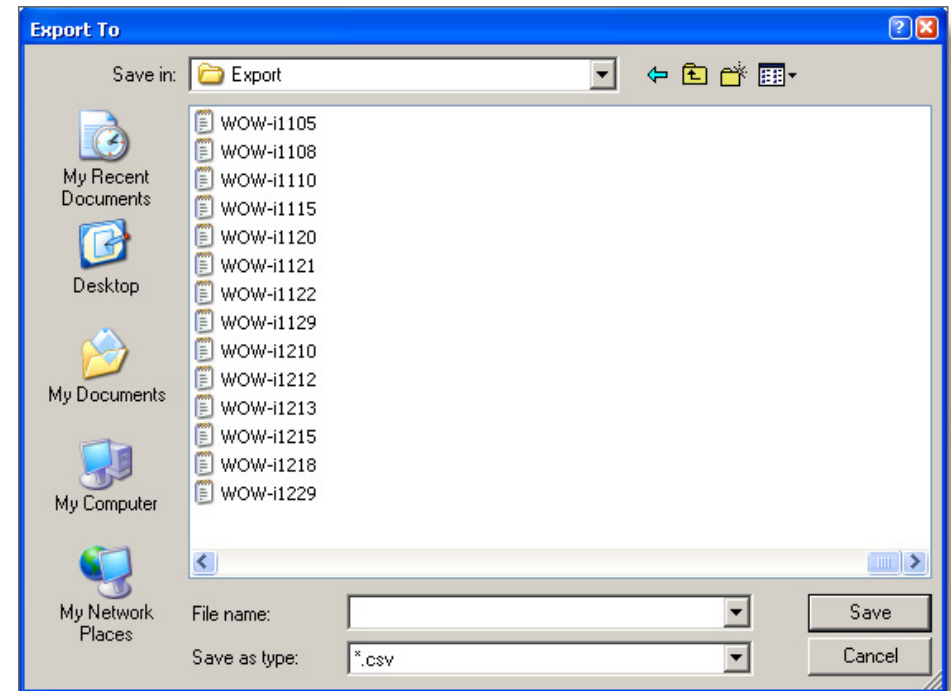
Check File will **not** check if the new reservations they are configuring are likely to clash with existing bookings on your system.

NOTES:

Administration of Courses



Your Site Configuration



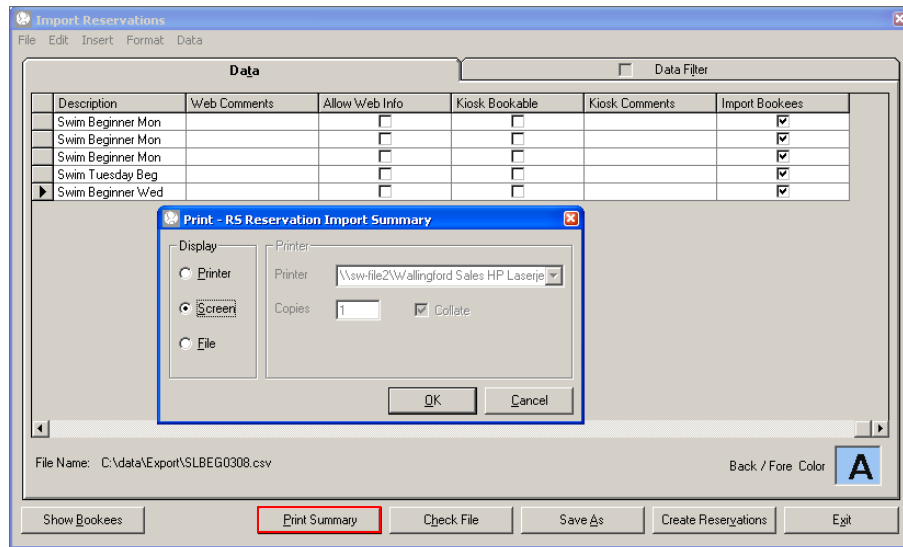
Step 5 Click the **Save As** button.

The user cannot select the **Create Reservation** button until the file has been checked and saved.

NOTES:

Administration of Courses

Your Site Configuration



Step 6

Click the **Print Summary** button to print a summary of the information when file has been saved. Click 'OK' to view on screen.

NOTES:

Administration of Courses

Your Site Configuration

Summary Import Reservation						
ID	Description	Site	Activity Group	Start Time	Duration	Frequency
W1SLBEG16000608	Swim Beginner Mon 4pm	WOW	WSLBEG	16:00	30	Weekly
W1SLBEG16300608	Swim Beginner Mon 4:30pm	WOW	WSLBEG	16:30	30	Weekly
W1SLBEG17000608	Swim Beginner Mon 5pm	WOW	WSLBEG	17:00	30	Weekly
W2SLBEG16300608	Swim Tuesday Beg 4:30pm	WO				
W3SLBEG16000608	Swim Beginner Wed 4pm	WO				

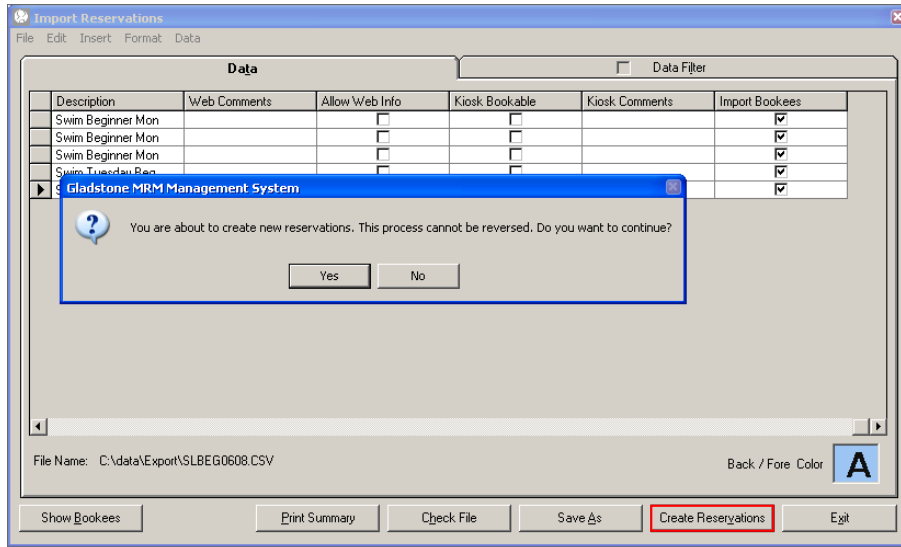
24/03/2008 14:04 1/1								
Training Database								
Jill Taylor (1)								
Duration	Frequency	Day(Week)	Start Date	End Date	Course	Product	Import	Bookings
		S M T W T F S						
30	Weekly		02/06/2008	04/08/2008	✓	W0401	Yes	
						WZMP8		
30	Weekly		02/06/2008	04/08/2008	✓	W0401	Yes	
						WZMP8		
30	Weekly		02/06/2008	04/08/2008	✓	W0401	Yes	
						WZMP8		
30	Weekly		03/06/2008	05/08/2008	✓	W0401	Yes	
						WZMP8		
30	Weekly		04/06/2008	06/08/2008	✓	W0401	Yes	
						WZMP8		

Summary Import Reservation Report will show a summary of the reservations to be imported.

NOTES:

Administration of Courses

Your Site Configuration

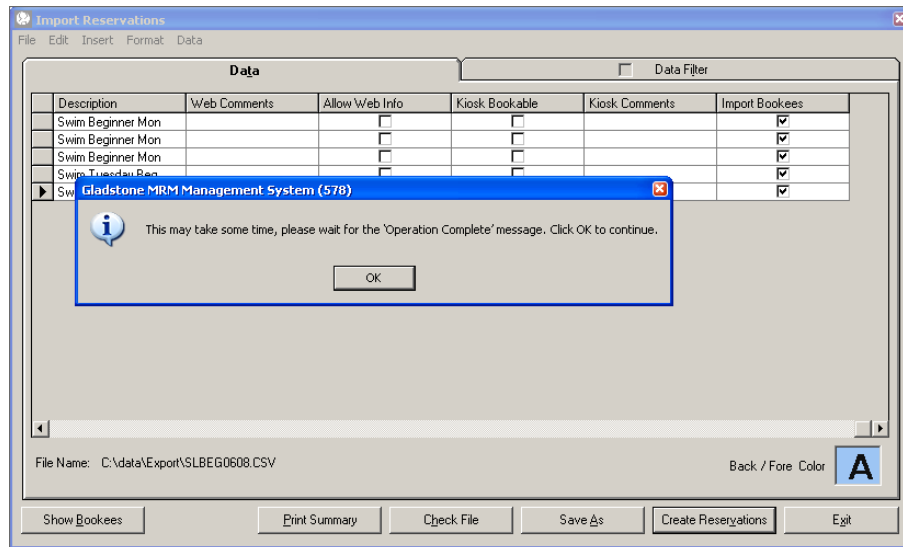


Step 6 Click the **Create Reservation** button for the system to configure the reservations. Click **Yes** to Continue.

NOTES:

Administration of Courses

Your Site Configuration



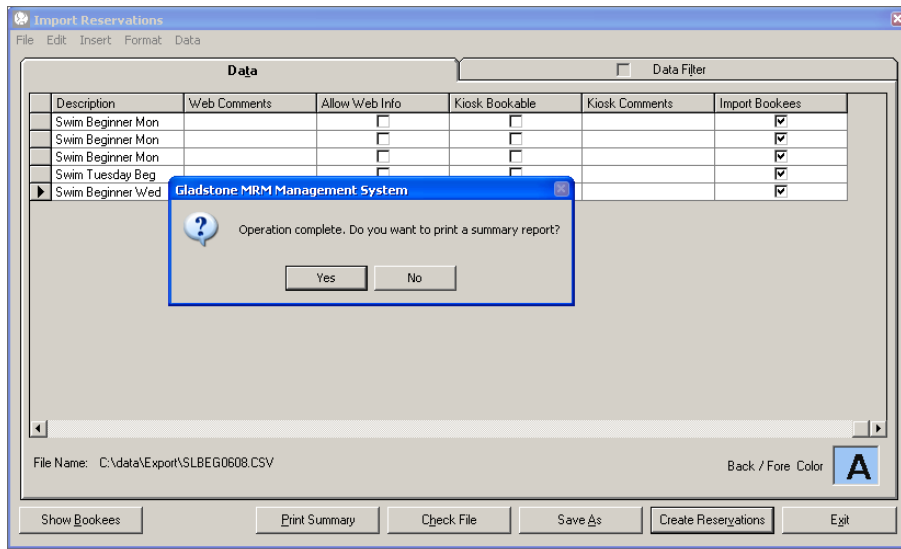
Step 7

When the user creates the reservations there is a message warning that the process may take some time. Select **OK** to continue.

NOTES:

Administration of Courses

Your Site Configuration

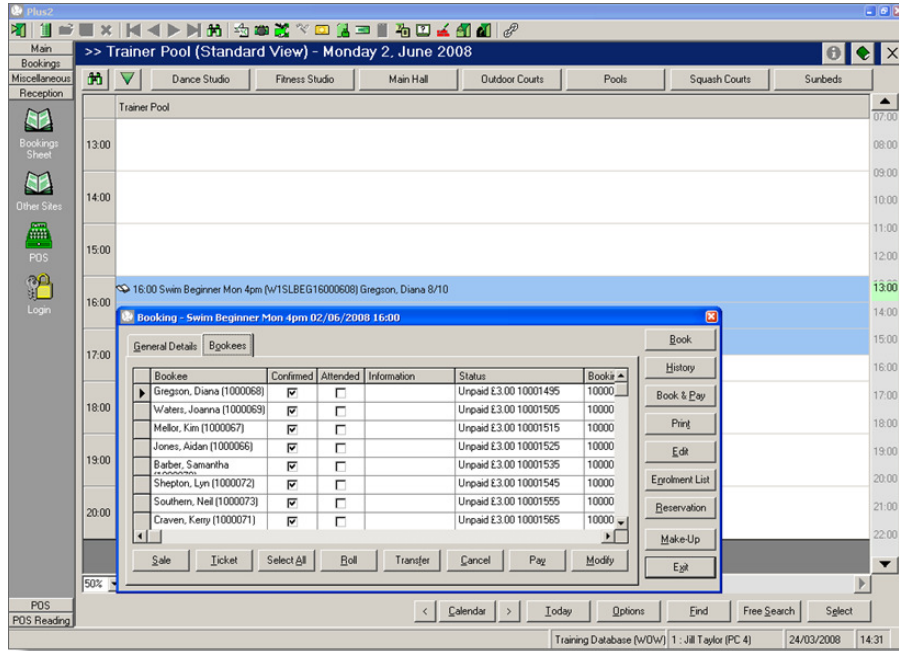


Step 8 The user will be prompted and a summary report produced when the reservations have been created.

NOTES:

Administration of Courses

Your Site Configuration



The new reservations are created on the booking sheets with the relevant bookees booked and unpaid.

Note:- The number of bookees on the above course have been reduced from ten to eight due to one bookee being a non member and one bookee not being ticked to roll.

Note:- The bookees are taken from the last session of the course so anyone transferred or cancelled from the final session will not be included.

NOTES:

Administration of Courses

The image shows two screenshots of a software interface for course administration. The top screenshot is titled "Booking - Swim Beginner Mon 4pm 24/03/2008 16:00" and shows a table of bookees with columns for Name, Confirmed, Attended, Information, Status, and Bookings. The bottom screenshot is titled "Booking - Swim Beginner Mon 4pm 24/03/2008 16:00" and shows the same table with the "Roll" button highlighted in red. Red arrows point from the "Select All" and "Roll" buttons in the top screenshot to the corresponding buttons in the bottom screenshot.

Bookee	Confirmed	Attended	Information	Status	Bookings
Morris, Fiona	<input checked="" type="checkbox"/>	<input type="checkbox"/>	01234 123456	Paid £3.00 10001201	10000
Naylor, Tim (1000038)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5pm Next Course	Paid £3.00 10001211	10000
Gregson, Diana (1000068)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Paid £3.00 10001264	10000
Waters, Joanna (1000069)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Paid £3.00 10001274	10000
Mellor, Kim (1000067)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Subscription Usage	10000
Jones, Aidan (1000066)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Subscription Usage	10000
Barber, Samantha (1000070)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Paid £3.00 10001302	10000
Craven, Kerry (1000071)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Paid £3.00 10001312	10000

Your Site Configuration

The user can select and roll a bookee or select and roll a group of bookees from one reservation to another from the Booking screen.

- Step 1 Click the **Bookees** tab.
- Step 2 Select one or more bookees to roll to another reservation. To select bookees, click in the first column against each person that wishes to roll, or click **Select All** to select all bookees.
- Step 3 Click **Roll**.
- Step 4 The Bookings Roll/Transfer screen will be displayed.

NOTES:

Administration of Courses

The left screenshot shows the 'Options' tab of the 'Bookings Roll/Transfer' window. It includes fields for Site (M/D/W), Reservation, Activity Group (Swim Lesson Beginners), and search criteria for time range (00:00 to 23:59) and date range (02/06/2008). A 'Search' button is highlighted with a red box and an arrow pointing to the right screenshot.

The right screenshot shows the 'Free Spaces' tab with a table of available slots. The table has columns for Day Date, Time Duration, Description, Booked, Sessions Remaining, and Resource Products. The first row is highlighted in blue. A 'Select' button is highlighted with a red box.

Day Date	Time Duration	Description	Booked	Sessions Remaining	Resource Products
Monday 02/06/2008	16:00 30 mins	Swim Beginner Mon 40m	8/10	10/10	WZMP8
Monday 02/06/2008	16:30 30 mins	Swim Beginner Mon 4-30pm	0/10	10/10	WZMP8
Monday 02/06/2008	17:00 30 mins	Swim Beginner Mon 50m	0/10	10/10	WZMP8

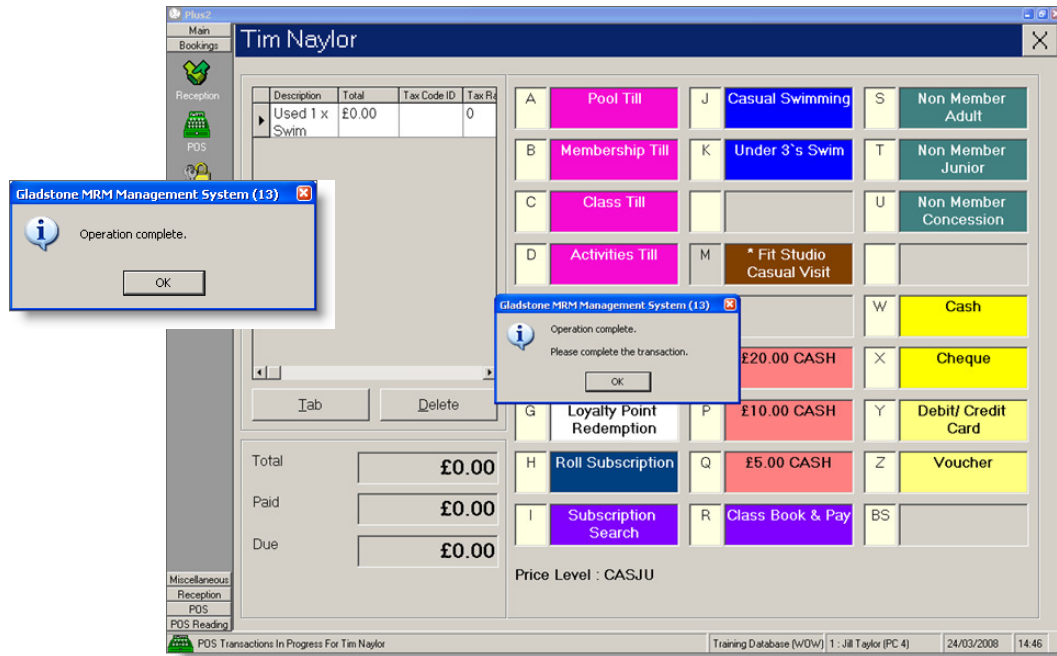
Your Site Configuration

- Step 5 On the Options tab, check the time, dates and days to search. i.e. The booker may wish to change the time or the day of the new course.
- Step 6 Click Search.
- Step 7 The results are displayed on the Free Spaces tab.
- Step 8 Highlight the required slot and click Select. Alternatively, double-click the required slot. If the user does not want to take payment now, select the **Do Not Prompt For Payment** check box at the bottom of the screen.

NOTES:

Administration of Courses

Your Site Configuration



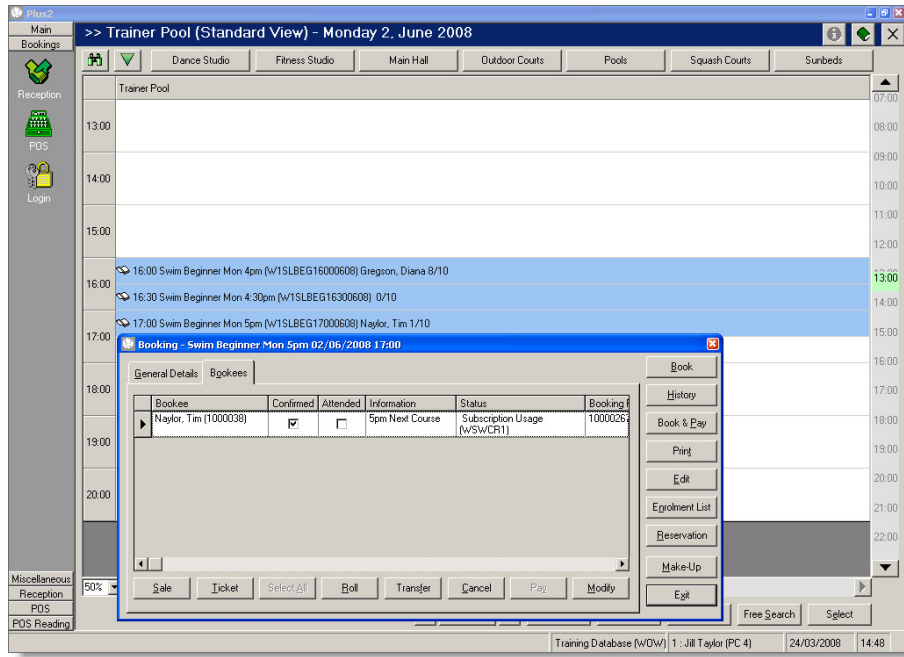
If the bookee has an in date 'Credit' Usage Subscription on their record. When rolling onto a new course the usage will automatically be used as the first weeks payment. This will be taken through to the till to be cashed off.

The 'Operation Complete' message will show. Click 'OK'.

NOTES:

Administration of Courses

Your Site Configuration

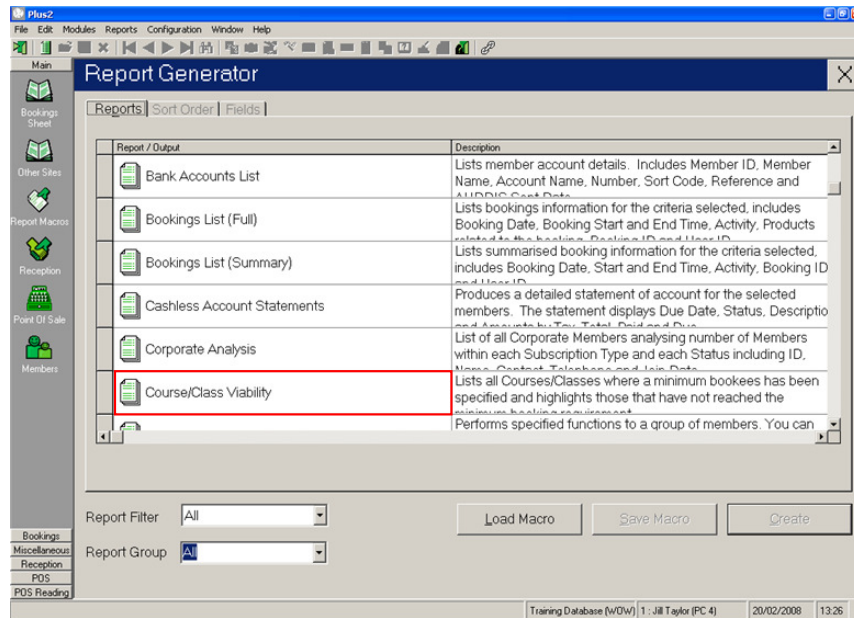


On the first week of the new course the bookee will be shown with a sale status of 'Subscription Usage'.

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Administration of Courses

Your Site Configuration

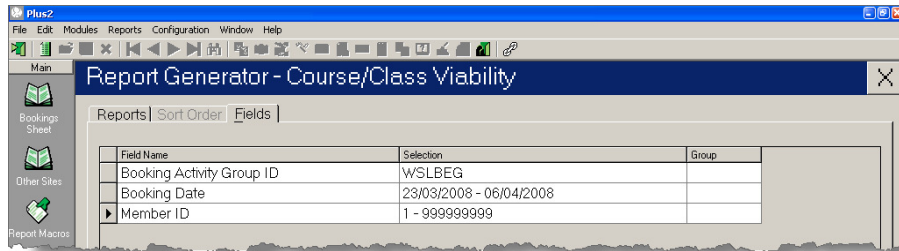


Course/Class Viability Report

Lists only courses/classes where a minimum number of bookees has been specified in the configuration and highlights those that have not reached the minimum booking requirement.

NOTES:

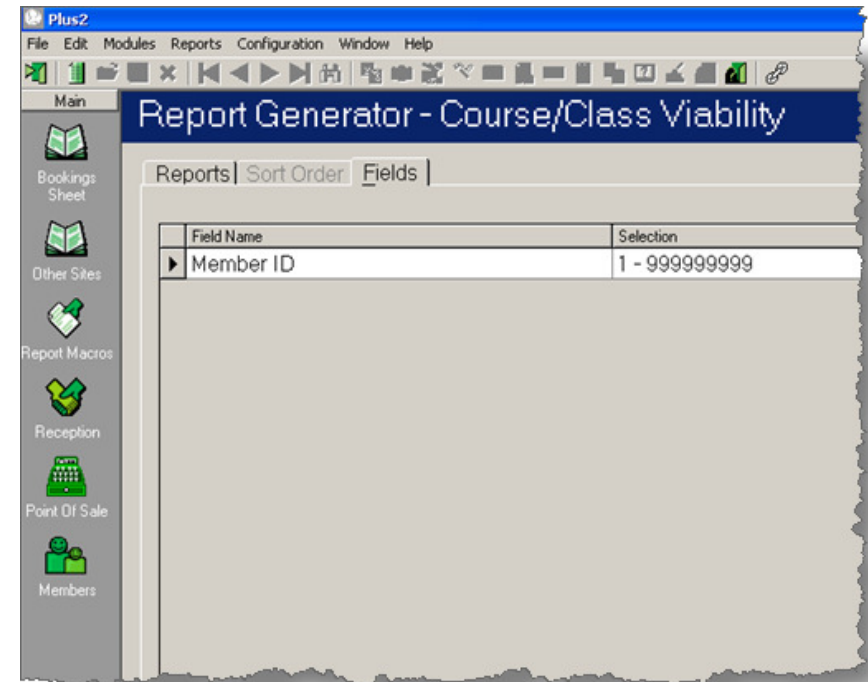
Administration of Courses



Course/Class Viability Report						
Reservation	Description	Start Date/Time	Min Bookees	Max Bookees	Bookee Count	
WSLEB3160 n191R	Swim, Beginner Mon 4pm	24/03/2008 16:00:00 31/03/2008 16:00:00	4	10	10	
WSLEB3163 n191R	Swim, Tuesday Beg 4.30pm	25/03/2008 16:00:00 01/04/2008 16:00:00	4	10	10	

Selection Criteria: [Booking Activity Group ID: WSLBEG]-[Booking Date: 23/03/2008 - 06/04/2008]-[Member ID: 1 - 99999999]

Your Site Configuration



The report visually represents how well the classes are running by showing classes/courses that have reached the minimum bookees in white with black writing. Classes/Courses that have **not** reached their minimum viability shows with a black line and white writing.

The report includes reservation ID and description, booking start date and time, minimum bookees, maximum bookees and bookee count.

NOTES:
