



1 Reception Till and Bookings Pre-Configuration

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NOTES:

Reception Till and Bookings - Pre Configuration

The first screenshot shows the 'Configuration' menu with 'Configuration...' selected. The second screenshot shows the 'Members' module configuration table:

| Module | Value |
|--|----------------|
| Members | |
| Allow Re-Allocation of Member Card IDs | No |
| Card ID Created When Adding Member | No |
| Find Members Per Character | Yes |
| Membership Card Line 1 | Name (full) |
| Membership Card Line 2 | Blank |
| Membership Card Line 3 | Blank |
| Membership Card Line 4 | Blank |
| Membership Card Line 5 | Member ID |
| Membership Card Picture | No |
| Membership Card Report Name | MemberCard.rpt |
| Profile for Members Screen | STAND |
| Profile for Quick Add Screen | STAND |
| Referred By User Field | 2 |
| Scope for Duplicate Member Checks | ALL |
| Show Priority Subscription | Yes |

The third screenshot shows the 'Bookings' module configuration table:

| Module | Value |
|---|------------|
| Attendance | |
| Card ID Swipe Size | 0 |
| Card ID Swipe Start Position | 0 |
| Display User Fields on Swipe | No |
| Scope for Entry Point Checks | ALL |
| Bookings | |
| Bookings Free Search Period (minutes) | 120 |
| Bookings Sheet Opening Period (days) | 365 |
| Bookings Sheet Refresh Period (seconds) | 60 |
| Check Infringements for Hosted Reservations at Sta... | Yes |
| Class Free Search Period (minutes) | 120 |
| Date Last Dishonour Process Run | 23/02/2008 |
| Date Last No-Shows Report Run | 23/02/2008 |
| Dishonour at Start of Day | No |
| Entry Point for Checking when Paying | WBOOK |
| Reservation Forward Booking Period (days) | 365 |
| Warn of Bookings on Same Date | Yes |
| Configuration Defaults | |

Your Site Configuration

Scope for Entry Point Checks - This allows customers from a site or group of sites to swipe an attendance to those sites only. It prevents members outside that site or group of sites entering the site. By default this is ALL site groups.

Card ID Created When Adding Member - If set to No this allows the manual assigning of card IDs to members. By default, it is Yes and would be left as so if sites were printing their own cards via a card printer.

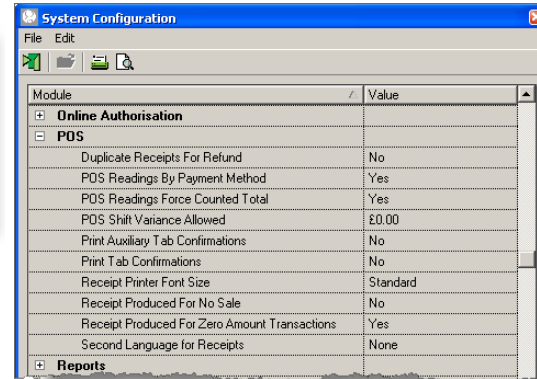
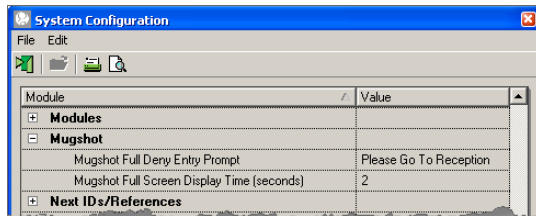
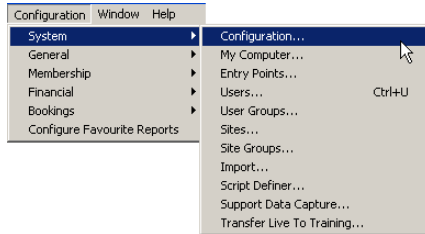
Membership Card Lines - If configured allows information to be printed onto membership cards through a card printer

Scope for Duplicate Member Checks - This allows restriction of the duplicate members checking screen to be site group specific. By default this is ALL.

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Mugshot Full Screen Display Time (seconds) - If an entry point is configured to **Display Full Screen Mugshot Image When Swiping** the mugshot will be displayed for a set period. By default, this is 5 seconds. The mugshot displayed will time out after this period, but can be manually cancelled by the user.

Duplicate Receipts For Refund - This will give 2 receipts when performing a refund from the Reception screen

POS Readings By Payment Method - This only works in conjunction with payment methods that are configured to allow a counted total. When performing POS readings, a **Counted Totals** tab is available in which to key the amounts taken by each payment method.

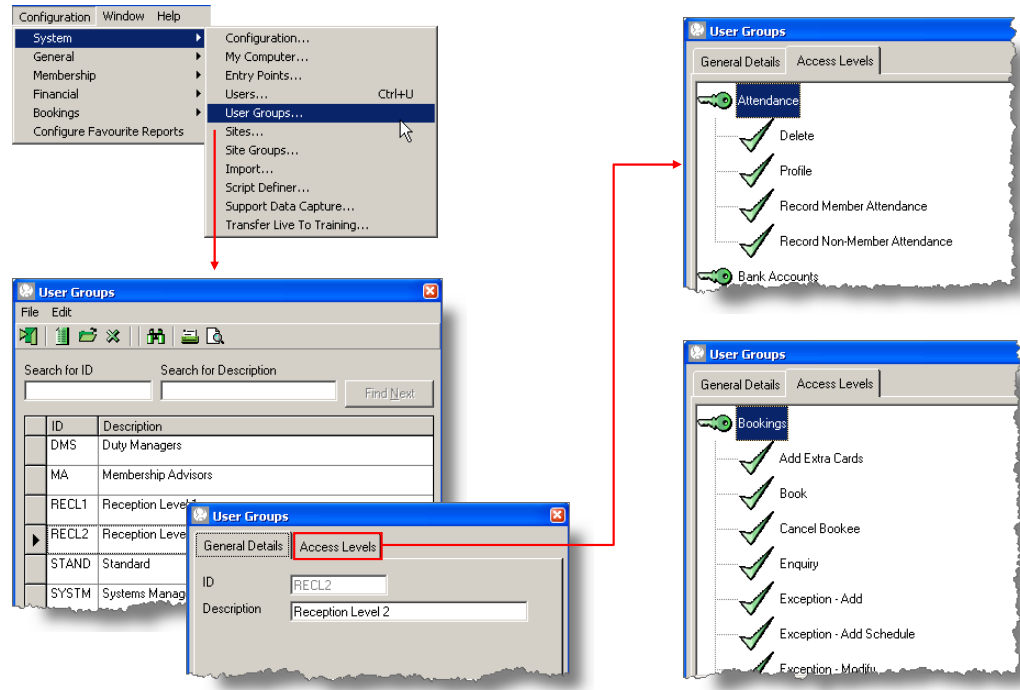
POS Readings Force Counted Total - This only works in conjunction with POS Readings By Payment Method. It will force the user to key in the counted totals by payment method.

POS Shift Variance Allowed - This is the amount by which the user's money can vary from the recorded money before the system shows an unacceptable variance

Receipt Produced For No Sale - This will will print a receipt when the user selects No Sale on the POS

Receipt Produced For Zero Amount Transactions - This will print a receipt where the sale total is zero.

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Your Site Configuration

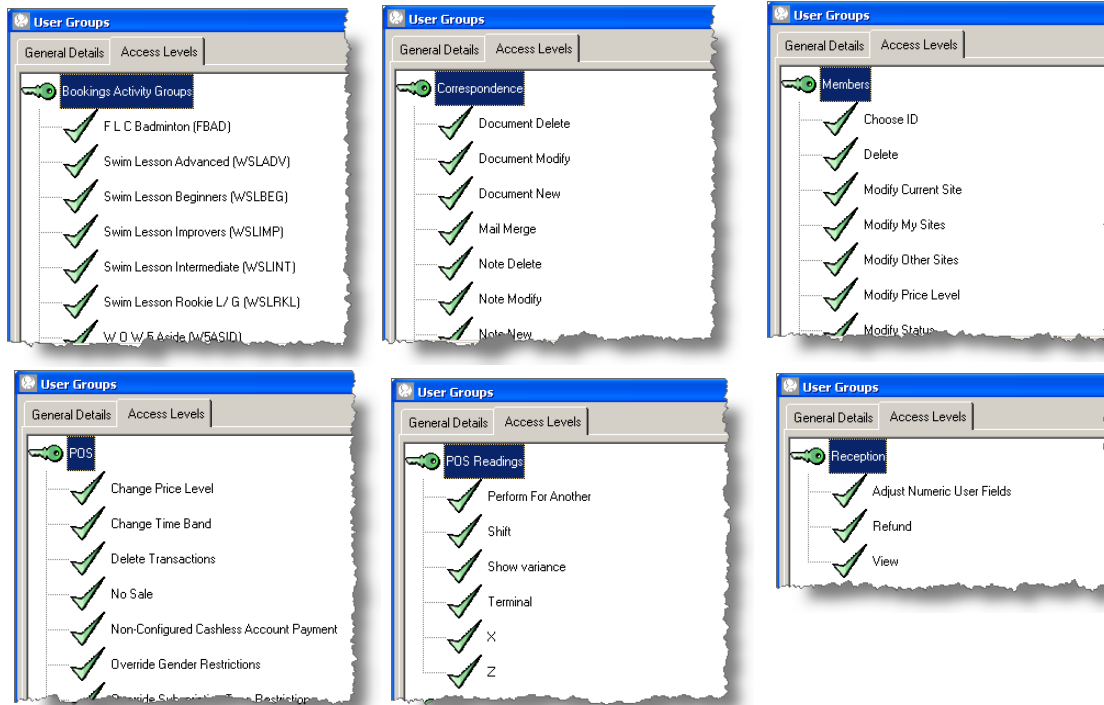
Access Levels - User Groups will be needed to give Receptionists access to functions within the system

Attendance - This controls the ability to view and record attendance. It is only visible if the Swipe (Attendance) module is invoked.

Bookings - This controls all aspects of bookings. It is only visible if the Bookings module is invoked.

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Bookings Activity Group - Each activity group for the current site is listed. The user can only access an activity/reservation if it belongs to an activity group whose access is on. It is only visible if the Bookings module is invoked.

Correspondence - This controls all aspects of correspondence.

Members - This controls access to various options within the Members and Prospects screens, either from the toolbar, or from the **Options** menu. Some of these access levels also control options within the Reception screen.

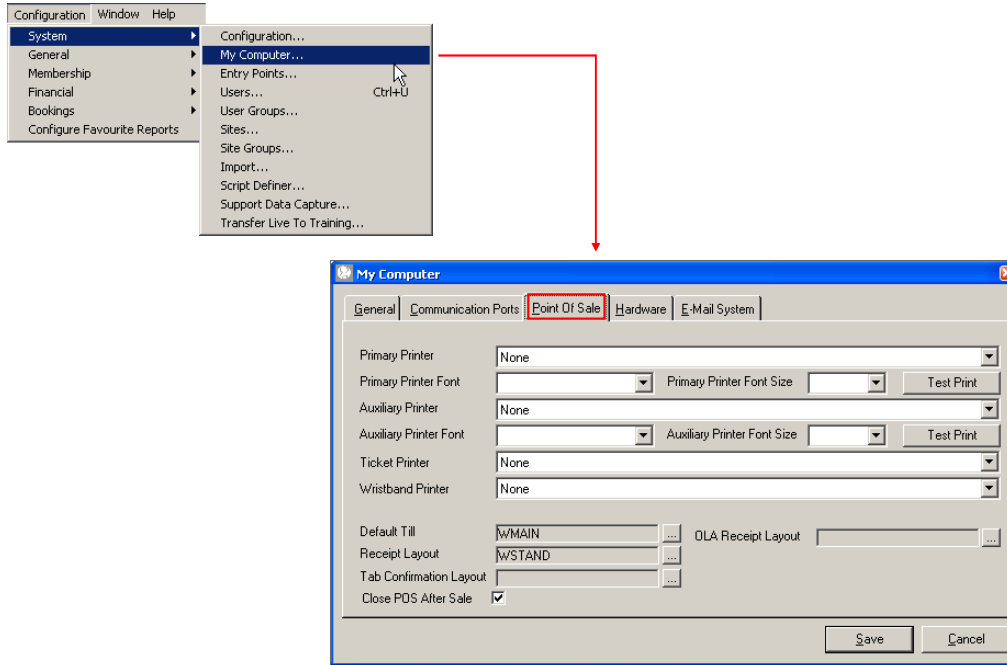
POS - This controls various aspects of POS functionality. It is only relevant if the Till (POS) module is invoked.

POS Readings - This controls access to POS Readings. It is only visible if the Till (POS) module is invoked.

Reception - This controls access to various options within the Reception screen.

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Your Site Configuration

My Computer - Point of Sale - This Tab controls various settings for controlling POS on this PC.

Printer settings - This specifies which printer to print to.

Printer Font - This specifies the type and size of the font to be used on the receipts at Point of Sale.

Default Till - Select the till that will show when the Point of Sale is opened. **NOTE:** Changing the Site will not change the Till in this setting.

Receipt Layout - Select the Receipt Layout that will show when a receipt is printed.

Close POS After Sale - This will close the Till after the monies have been paid

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Your Site Configuration

Entry Points - The Reception and Booking Sheet Entry Points need to be configured

Entry Point Settings:-

Display Reception when swiping - This will show the Reception Screen when recording a swipe for a customer

Display POS when Swiping - This will show the POS screen when recording a swipe for the customer

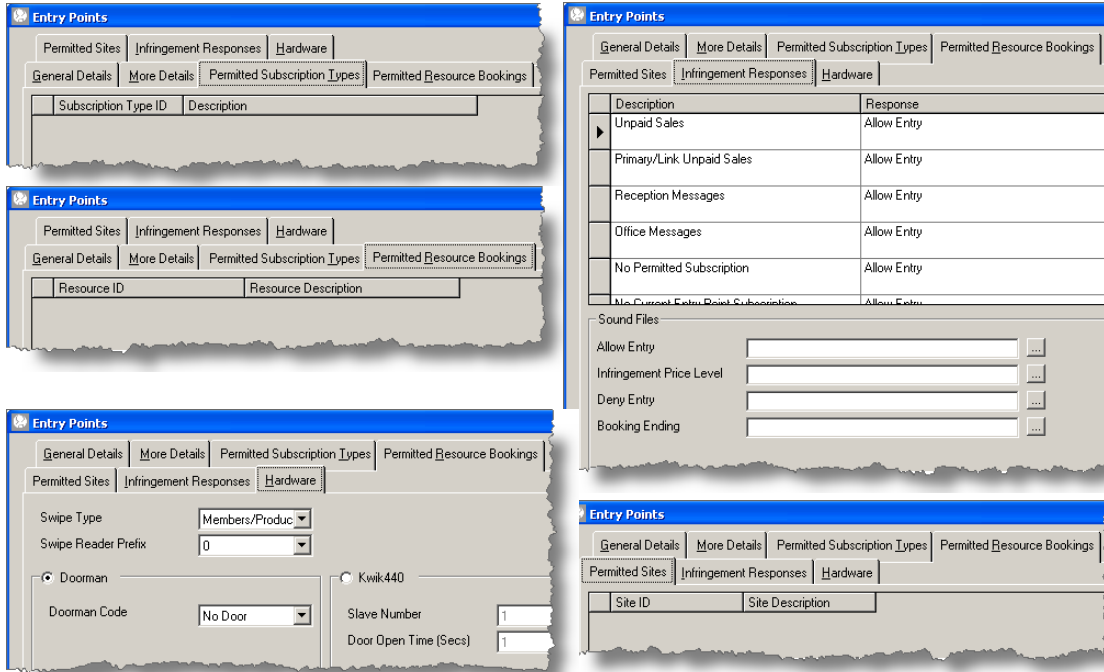
Display Full Screen Mugshot Image When Swiping - This will show the picture of the customer with their First and Last Name when recording a swipe for the customer

Record Attendance - This will record an attendance for reporting purposes

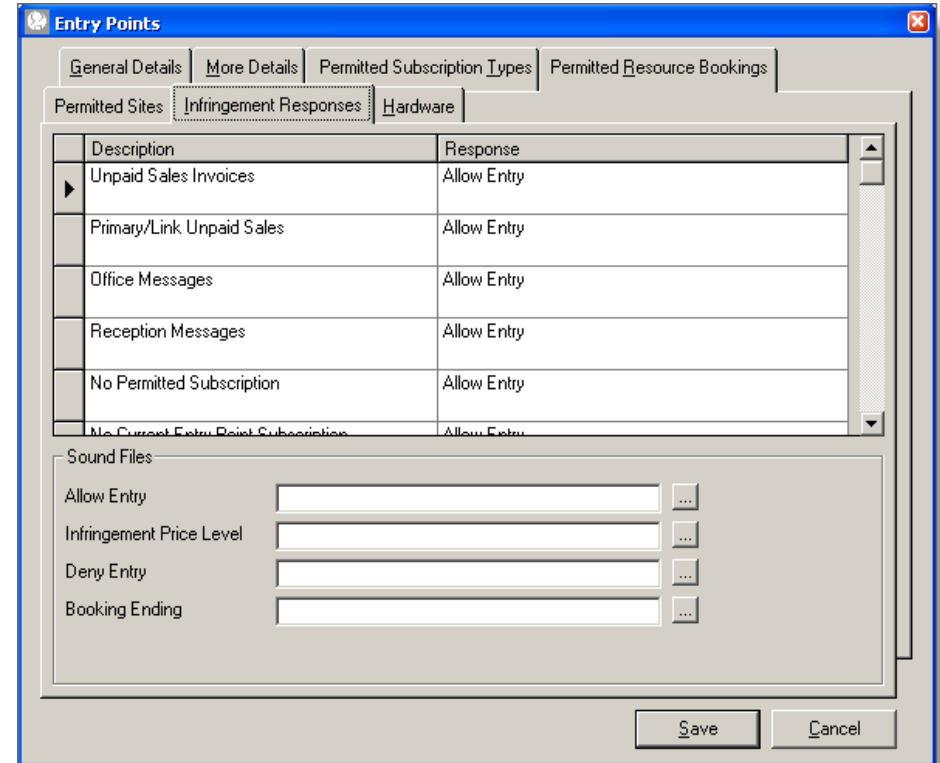
Duplicate Swipe - Every swipe will record an attendance even if the same membership card is swiped consecutively unless a duration is set

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Your Site Configuration



Permitted Subscription Types - If a customer has an in date subscription that is listed in this screen the customer will be allowed access (normally configured on a door or turnstile)

Permitted Resource Bookings - If a customer has a booking on an area that is listed in this screen the customer will be allowed access (normally configured on a door or turnstile)

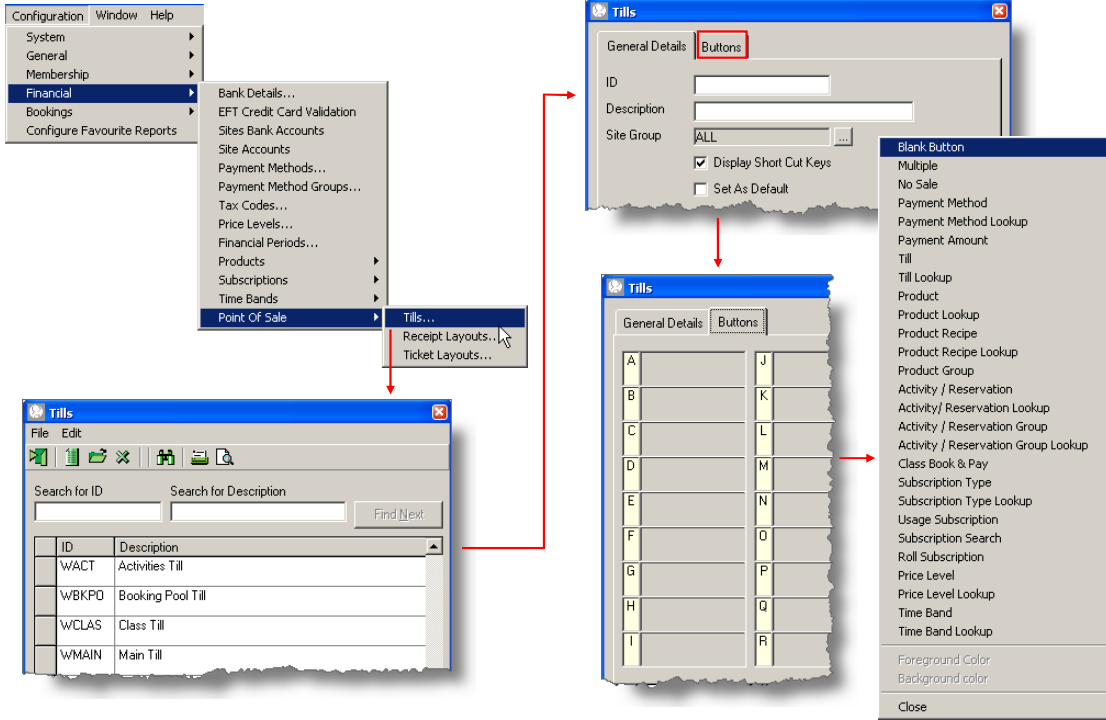
Permitted Sites - If a customer belongs to a site that is added in this screen access will be allowed

Infringement Responses - There are 3 responses for the situations listed

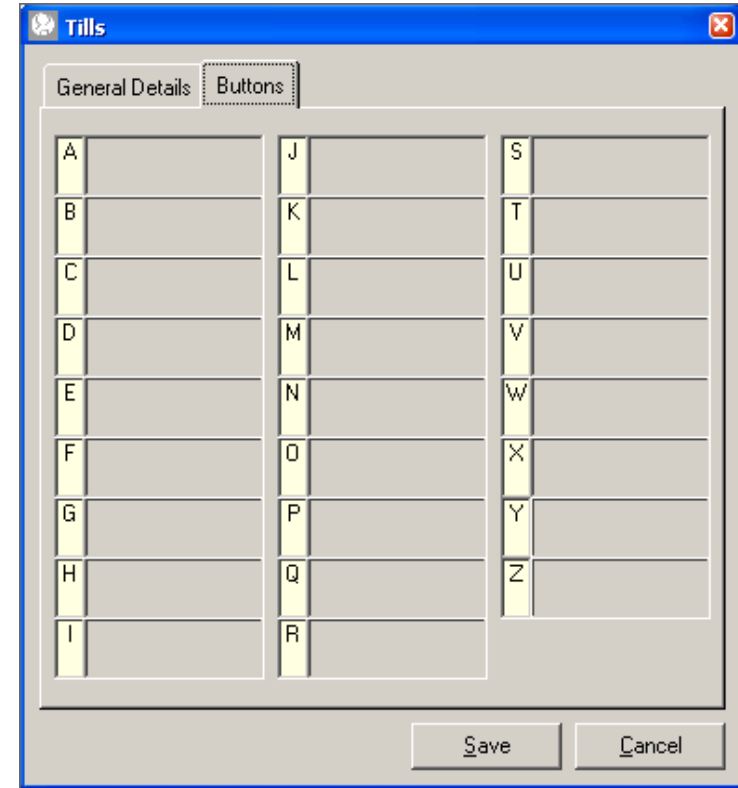
- **Allow Entry** - This will allow the customer access
- **Allow Entry , Charge Infringement Price Level** - This will allow the customer access but charge the Infringement price when charging monies
- **Deny Entry** - This will deny the customer access

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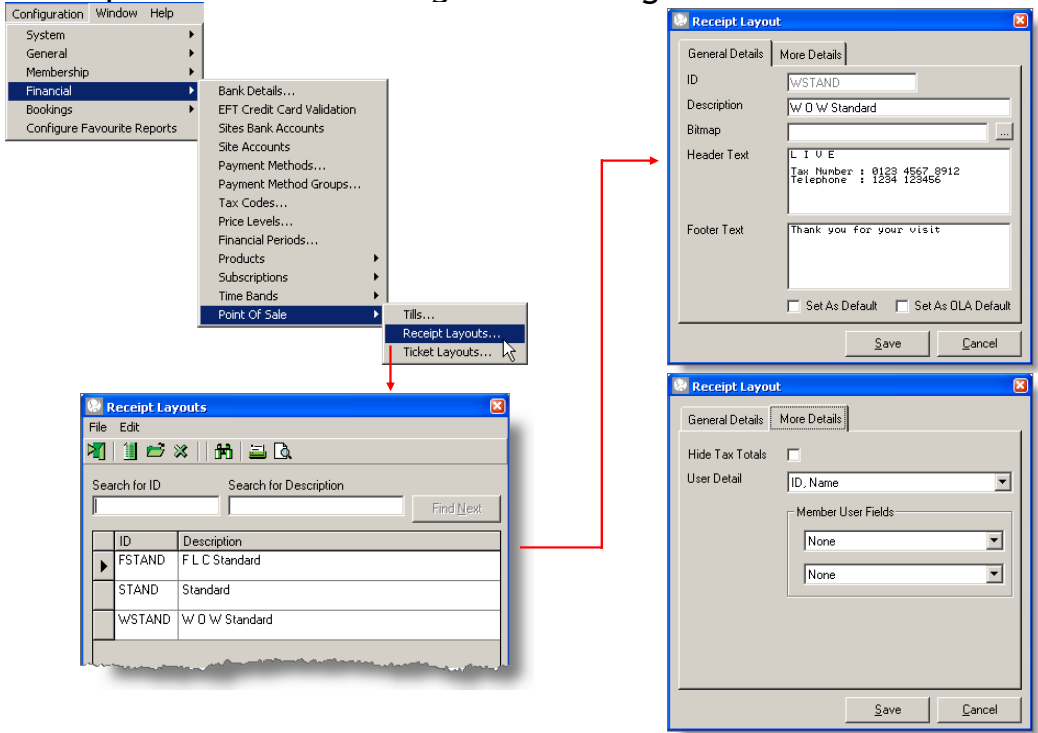
Your Site Configuration



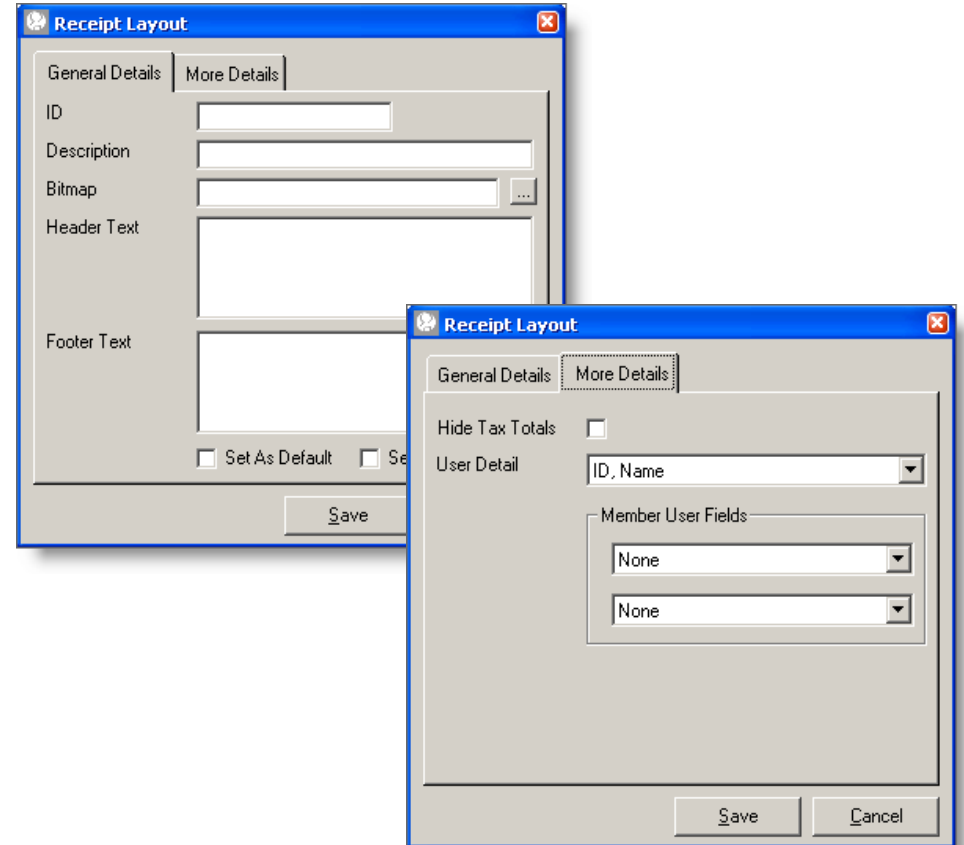
Tills
 The Tills need to be created with all the relevant buttons on them

NOTES:

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Your Site Configuration



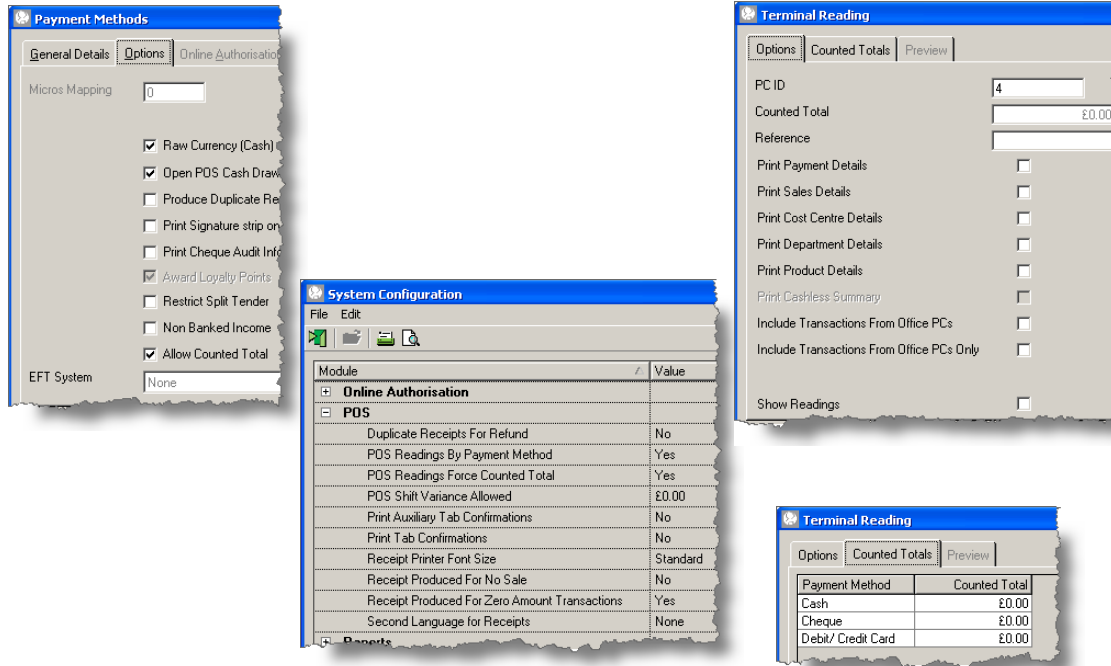
Receipt Layout

This needs to be configured.

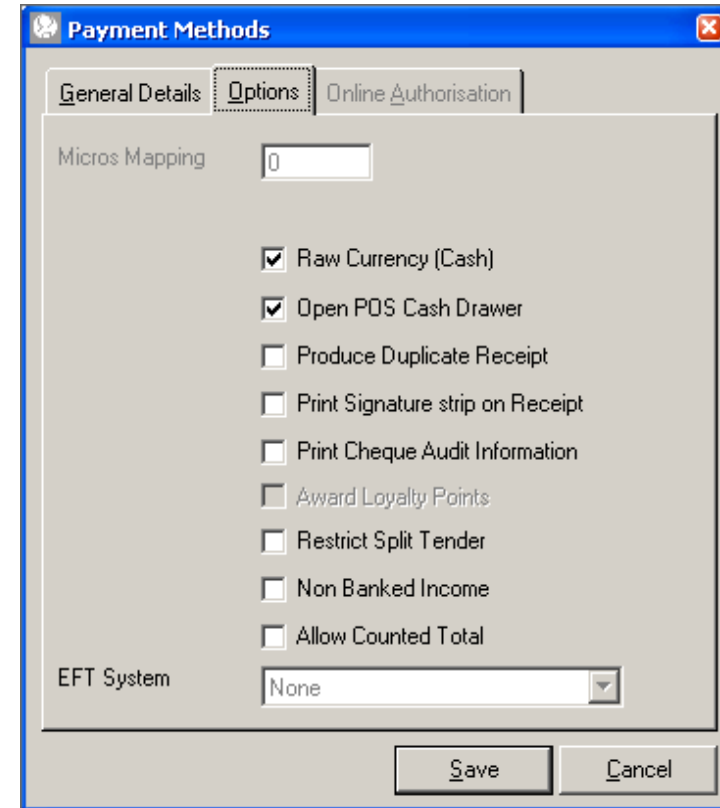
NOTE: Having the Name on the Receipt looks at the name added in Configuration > System > Users

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Allow Counted Total - When using 'POS Readings by Payment Method' each payment method to be shown in the 'Counted Totals' list will need to have 'Allow Counted Total' ticked

Payment Method - Allow Counted Total

POS Readings by Payment Method - Yes

Terminal Reading - Counted Totals

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The screenshot shows the 'Membership Wizard Groups' menu path: Configuration > Membership > Membership Wizards > Membership Wizard Groups. It also displays three 'Membership Wizards' windows. The top window shows 'General Details' for 'MPSRD' with a description 'Prosp To Member D D' and a wizard group of 'Administration'. The 'Introduction' field contains a red warning: 'Please be aware that money is taken during this process and this cannot be stopped once undertaken. PLEASE ENSURE THAT THE CUSTOMER HAS FUNDS AVAILABLE'. The 'Conclusion' field contains: 'Please ensure that the DD Mandate is fully completed and is signed. Pass the Mandate to Office In Tray'. The bottom window shows the 'Steps' tab with a table of steps:

| Step No. | Description | ID |
|----------|---------------------------|-------|
| 1 | Status To Current | STCUR |
| 2 | Price Lev To Member Adult | PL MA |
| 3 | Add D D Sub | SADD |
| 4 | Pros To Membr -Office Mes | MPSR4 |

Your Site Configuration

The screenshot shows the 'Membership Wizards' window with the 'Steps' tab selected. The fields for ID, Description, Wizard Group, Introduction, and Conclusion are currently empty.

Membership Wizard - Prospect to Member Wizard

- Change Status
- Change Price Level
- Add Subscription
- Add Office Message

NOTE: Steps must be added in the applicable order.

NOTES:
