QUICK BOOKINGS

This is the fastest way of entering regular bookings. Just choose a child, choose a template and click the   calendar days that you wish to book. The Monday template items are booked onto the selected Mondays, the Tuesdays items on Tuesdays, etc.

Quick Bookings can be made from the Family Centre for a child at a time, or from the Booking Centre for larger collections of children.

Timesheet / Register Forms are better for recording any last minute attendances, or if you have any drop-in services that are not booked in advance.

The Quick Bookings Calendar

With the Quick Start tutorial data loaded lets look at a booking.

> *Go > **Home > Family Details > Family Centre > Choose the Coypu family > go to the Calendar tab >***

Now find the drop down calendar view control and select the Quick Booking calendar.

Now turn on the sidebar by clicking on the Toggle Sidebar button. If the calendar looks cramped switch off the Workflow Manager using the Toggle Workflow button.

Use the arrow buttons to bring January, February and March 2013 into view. The grey squares show days when the setting is closed. Green squares show days with a Coypu family booking.

Setup Quick Booking

Add Children
(Rose Coypu)

Select Service Template
(Rose's free entitlement)

Select Date Range
(54 days selected)

Validate Quick Booking
(Validation Passed / Skipped)

Monthly In Advance (Last Day) ▼

Apply Quick Booking

We are going to work our way down the sidebar to make the bookings.

1. Click on 'Add Children' and choose Rose Coypu.

2. Click on 'Select Service Template' and choose 'Rose's Free Entitlement'

3. There is no need to click on the Select Date Range button. Instead:

- Click on 7th January 2013 on the calendar.
- Hold down your keyboard SHIFT key and click on 28th March 2013.
- The selected squares turn purple. (54 days selected)

4. Click on the Validate Quick Booking button to validate the bookings.

   You must pass validation before you can apply the booking. It checks for booking clashes and for the setting being overbooked.

5. Choose the payment scheme that you want to use for these bookings.

   (In Arrears, Monthly, Weekly or Termly in advance, etc.)

   Use Monthly In Advance (Last Day) for this example.

The calendar should now look something like this:

Press the **'Apply Quick Bookings'** button. The bookings will be applied and the booked days will turn green. (Rose's template just contained services on Thursdays and Fridays.)

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We will have a look at some of the Quick Booking steps in more detail.

Selecting Calendar Days

There are several ways to select days on the calendar

- A. Just click on a day to select or deselect that day.
- B. Select a date range using the Click then Shift Click method that we just used.
- C. Double click on the Jan, Feb, etc labels at the beginning of a row to select or deselect that month. (A good way to select a month very quickly.)
- D. Double click on the Mon, Tue, etc. column titles to select or deselect the days down the calendar.

Charging Schemes

SuperFox has several pre-programmed charging schemes to help us invoice in advance or in arrears.

Your choices are:

- In Arrears
- Termly / Half Termly in Advance
- Weekly In Advance (various)
- Monthly In Advance (various)
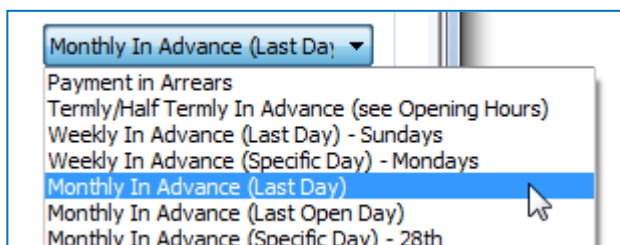
Charge Dates and Invoices

* IMPORTANT * There are two dates associated with each service that we book:

1) **Delivery Date** - This is the date the child will arrive and use the setting.
2) **Charge Date** - This the date that the booking becomes chargeable.

When you prepare your invoices SuperFox will ask you to choose an invoice date.

The invoices produced will use the charge date to decide whether to include a booking on the invoice.

If a booking has a charge date after the invoice date it will not be included, otherwise it will appear on the invoice.

The charge date is set automatically when you choose the payment scheme as you make the booking. It is easy to see how this works in practice.

Charging In Arrears

If you book a service to be paid in arrears then the charge date will be automatically set to be the same as the delivery date. This means that the booking will always appear on the next invoice that is produced after the booking is used.

Charging in arrears is good choice for entering extras you may sell and any unexpected late stays. They will always appear on the very next invoice after they were booked.

Charging In Advance

* VERY IMPORTANT *

A good choice for the charge date is **the day before** the start of the booking period.

If you then prepare invoices for the same charge date it will include all of the advance charges for the period to come, and the arrears charges for the period just gone.

For example, if you charge monthly in advance a good choice for the charge date would be the last day of the previous month.

The advance charging options you can choose in SuperFox are:

Monthly In Advance

- Last Day   -   Last day of previous month, the normal choice.
- Specific Day   -   Choose an alternative day of the month between 1st and 28th instead of the last day.
- Last Open Day -   Choose the last day the setting is open instead of the last day of the month.
                     (This could be handy if you close for the summer before the end of July.)

Weekly In Advance

- Last Day   -   Last day of previous week (Sunday)
- Specific Day   -   Choose an alternative last day of week instead of Sunday

Termly / Half Termly In Advance

> If you choose this option the bookings will use the optional dates that you set up when you entered the setting opening hours (page 22). All date ranges need to have the optional payment date set before you can use this option. This prevents the booking from being made on a date with no associated charge date.

Undoing Quick Bookings

If there has been a simple mistake with the Quick bookings (put them on the wrong month, etc) you can undo them:

Go > Home > Family Accounts > Booking Centre > Undo Quick Bookings Tab >

- If the bookings are not yet on an invoice then the Undo process will delete them from the database.
- If the bookings have been invoiced the Undo process will cancel them instead

* IMPORTANT *

Cancelled bookings remain in the database but they will not appear on register pages or Free Entitlement returns. They will still appear as chargeable items in the invoices too. You can raise credits against the cancelled bookings from the Booking Centre > Cancellation Credits tab >.

Tip!   The quickest and easiest way to remove the unwanted Quick Bookings that have appeared on an invoice is to delete the invoice batch and then use the Undo Quick Bookings function. This will delete the booking rather than cancelling it, saving you the job of raising cancellation credits.

Selecting Calendar Dates

The easiest way to choose the dates to make bookings is to click on the calendar. Although the calendar will remember and use dates that have been scrolled out of sight it is best to adjust it so that all of you rdate sto book are in view.
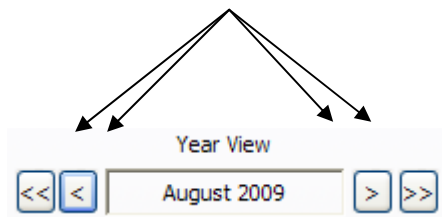
 move back and forward by 1 year

 move back and forward by 1 month

There are several options to select days to book.


Click on the day on the calendar – it will turn purple when selected.

Double-click a day column header to select a given day of the week.

Double-click on a month row to select an entire row.

Select a date range by clicking on the first day, hold down the keyboard shift key and click on the last date in the range. All of the open days between the first and last clicks will be selected.
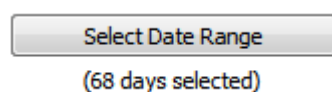
When you have made your selection the Select Date Range button will display the number of selected days. (68 in this case.)

The **Select Date Range button** allows you to set up recurring date ranges and save them for future use, it is not likely that you will need to use this button unless you have several different booking schedules in use in your setting.

Booking Validation Error Checks

Validate Quick Booking

(Validation Passed / Skipped)

You need to run the validation check before you can save any new bookings.

The program will check for obvious errors like exceeding the setting registration limits, trying to book the child when they are already attending, optional service limits, etc.

The validation progress and results are displayed in the Quick Booking Validation pop-up.
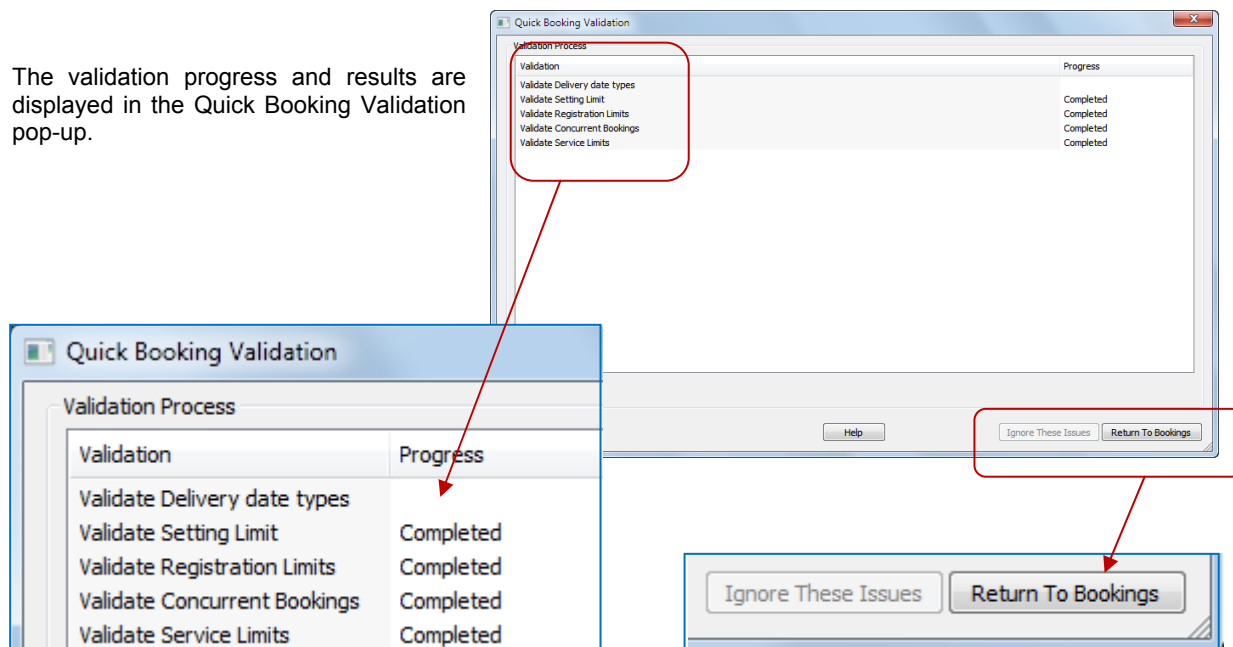
No Errors Found

If there were no errors you can press **'Return To Bookings'** and you will be able to apply the bookings.

Errors Found

If any errors are found they are displayed and you can print the error list if you think it contains issues that you need to correct.

If there were errors and you press **'Return To Bookings'** you will not be able to apply the bookings but you will be able to change the displayed bookings.

You can also click the **'Ignore These Issues'** button and continue with the bookings. (E.g. if you had an optional 14 child limit for an Art Club session it might be okay to book 15 children.)

Using The Test Manager

You can choose which test to apply when you save bookings from the Quick Bookings calendar by using the Test Manager in the Booking Centre.

Go > Home > Family Accounts > Booking Centre >

   Test Manager tab > Quick Bookings tab >

SUPERFOX Software for Childcare Superheroes. © Helios Computing Ltd.
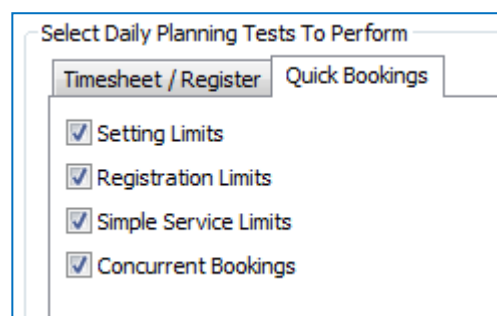
Undo Quick Bookings

If the Quick Bookings contained an error they can be undone so long as they have not yet been invoiced. If bookings have been invoiced then Undo Quick Bookings will cancel them in usual way.

Go > Home > Family Accounts > Booking Centre > Undo Quick Bookings tab >

The bookings are displayed on a form that allows you to undo all or some of any quick booking batch. (Some children or account holders if they sneaked into the original bookings by mistake.)

Batches of Quick Bookings   *Filters*   *All children in the Batches list*

*Select the filtered bookings to undo from this list*

Here is what to do:

1. Choose the Quick Booking batch to correct (you may need to un-shorten the list or change the date range)

2. Apply any helpful filters or limit by child to find the bookings to undo.

3. Select the bookings to undo from the bottom list (see the List Selections mini guide).

4. Press the Undo button. (This will start the cancellation function for the selected bookings)

5. Go to the Cancellation Credits tab to apply any necessary cancellation credits to bookings that were cancelled rather than deleted.

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Unusual Charging Schemes

It is highly unlikely that you will need to use this feature, but if f your setting needs a more customised payment schedule (e.g. fornightly in advance) you can set this up using the Quick Booking Calendar's payment view.

The new payment schedule will be added to the 'Charge Date' drop down list that is used in the Timesheet, Register and Quick Bookings.
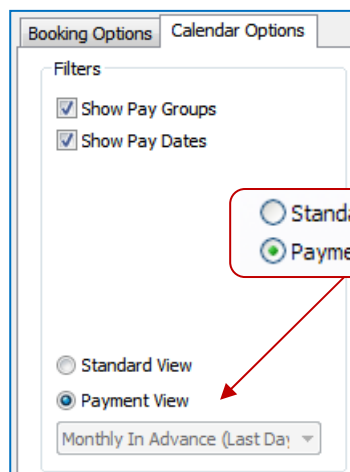
Make sure that the calendar has the payments scheme in 'Arrears' selected.

Now lick on 'Payment View' from the 'Calendar Options' sidebar tab.

This changes the calendar to show the payment schedules only.

Start by clicking on 31st August. This will make it into a payment date which will be highlighted in red.

The 31st August is now numbered '1' – it is the first payment date we have added.

Now hold down the Alt key and click the payment date again.

The days is now highlighted in green. We are ready to click the dates that will use the 31st August as their payment date.

With the payment date still selected in green, select the days in September (individual clicks or as arrange selection). These will be labelled '1' to show that they are associated with payment date 1.

Hold down the Alt key and click on the payment date (31st August) to leave edit mode and return it to it's red colour. This has set up the month of September as paid in advance with a payment date of 31st August.

The entire term set up as monthly paid in advance would look like this:

There are 4 payment dates:

- 31 Aug – for September bookings
- 30 Sep – for October bookings
- 31 Oct – for November bookings
- 30 Nov – for December bookings

A few useful tips:

1) You can remove a payment date by holding down the Ctrl key and clicking on the unwanted payment date.

2) When a payment date has it's number square coloured in red this means that the day has a different delivery and payment date. (That's okay, it's just a way of showing it.)

Here the 30th is payment date 2, and the items booked on the 30th will become payable on payment date 1.

3) You can save the Payment Scheme as a template using the Dates button whilst in Payment View, so this is an exercise that you would typically do this once a year for the entire year.


Changing back into Standard View you can see the completed date entries if you have ticked to Show Pay Groups & Dates.

Saving Your Payment Template

Now you have set up the custom charge date scheme you will probably want to save your payment schedule as a charge date template to use again in future.

To save the charge date schedule as a template stay in Payment View and press the Select Date Range button.

Select Date Range

(68 days selected)
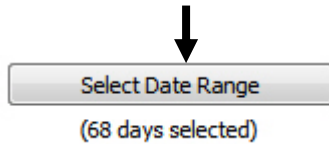
SuperFox will display the Date Range Recurrence form.

Date Range Recurrence

○ Use Template
Existing Template

◉ My Templates: [▼]

○ Use Date Range

Recurrence Pattern

◉ Daily   ◉ Every [1]   day(s)
○ Weekly
○ Monthly   ○ Every weekday

Recurrence Range

Start: [05 July 2012 ▼]   ○ End after [1] occurrences
                             ◉ End by [31 July 2012 ▼]

Recurrence Application

◉ Add These Dates   ○ Remove These Dates

Now choose the Store / Manage Templates option.

◉ Store / Manage Templates
Template Management

[Manage Templates]   [Save Dates from Calendar as Template]

[Finish]   [Help]

…and then press the Save Dates from Calendar as Template button.

Enter Template / Grouping title

Enter a suitable title

[Practice monthly template   ▼]

Enter a description

Example for practice

[OK]   [Cancel]   [Help]

SuperFox will then ask you to give the payment template a title and a description.

For this example use 'Practice Monthly Template' as a title, and 'Monthly in advance from tutorial' as a description.

Press OK to save the template.

You can view, edit and delete your saved templates from the **Manage Templates** button.

The Manage Templates button displays the custom templates that you have defined.

- The lower part of the display shows the details of the payment templates that you have created.

- The upper part of the display allows you to rename and delete the templates.

- The 'include in menu' option will add the template to the bottom of the drop down charge date list in Quick Bookings. It will not be added to the drop down menus on Register and Timesheet tabs as there is no visual indication of what you have chosen in these locations.
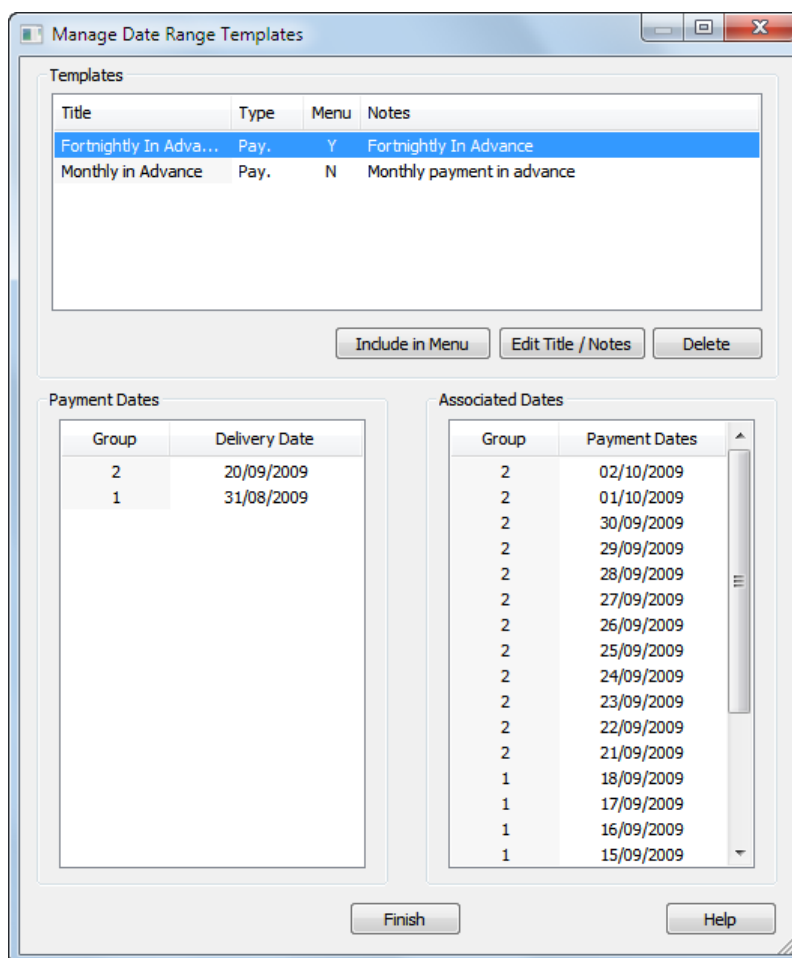
Notes

If you wish to load a template that you have not yet added to the drop-down list when you are entering future Quick Bookings click on the Dates button, then choose the **Use Template** option at the top of the Date Range Recurrence form.

If you delete a template it will not affect the bookings already made using the template. The delivery and charge dates are frozen into the booking line items.

Remeber these templates are only for peope with unusual payment schemes and they should not be necessary for users with typical weekly, monthly or arrears charging schemes.

The normal pre-calculated payment scheme options will work for any date that you book, but these manually created options cover only the dates set up in the template.

End