MOVIDIA ERP 2.0

SEPT, 2012

QUICK REFERENCE GUIDE

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AN INTRODUCTION TO MOVIDIA ERP2.0

Movidia ERP2.0 is a web-based facility management system designed mainly for use by general sport centers. The system includes features such as Booking, Point of Sale (POS), Payroll, Customer Management, and Real Time Reporting. It is developed based on the same platform as many banking systems. With Movidia ERP2.0, clients' bookings, lessons, and sales can be recorded and tracked across several locations in real time. Movidia ERP2.0 provides quick and easy information processing for businesses to effectively control their sales, marketing, billing, and inventory activities.

GETTING STARTED

- Authorized customers who have a current support agreement with Movidia Intelligence are given an Internet Explorer (IE) address with a valid user name and password.

How to access MOVIDIA ERP2.0

- Open Internet Explorer
- Navigate to the webpage by typing in the provided Uniform Resource Locater (URL) in the address bar.
- Under "Tools", select **Internet Options**.
- Change the security settings by clicking the **Security** tab. Select the **Local Intranet** zone, and then click **Sites**.
- Click **Advanced**.
- The website will appear in the **Add this website to the zone** field. Click **Add**.
- **Close**, and then click **OK** twice.
- Contact Movidia to initialize the system.
- Log on by entering your **user name** and **password**, and selecting **Login**.

OVERVIEW OF MOVIDIA ERP2.0

Upon logging into the system, information on Booking, Sales, Reports, Management, and Options can be accessed from the top Menu Bar of the home page.

Booking allow users to view current court bookings, add new court bookings, or update and change existing ones. Court bookings include Group and Private Lessons, as well as Court

Rentals and Drop-ins. Point of Sale (POS) terminals relay information on each sale item. Sales allow users to make Inventory Sales and Refunds. As well, view POS History, and Close POS Transactions. Payroll Reports can be obtained under Reports. Management allow users to create Customer accounts, keep track of employees (Staff, Coaches, etc.) and other business locations, and maintain accurate Inventory Storage records. Lesson rates and Coach Payroll rates are also controlled under Management.

NAVIGATING MOVIDIA ERP 2.0

Standard Buttons

See the list of standard buttons below, each of which is appropriate for the specific usages described:

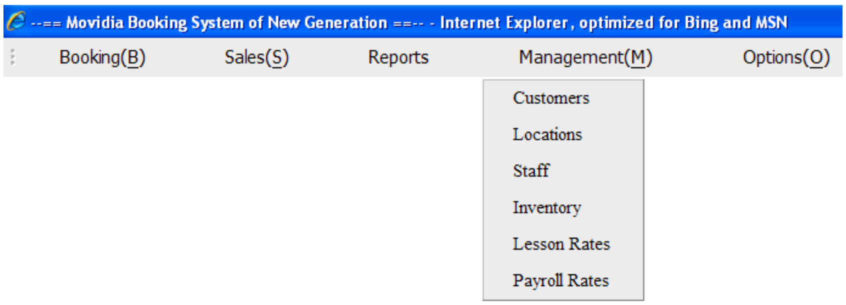
BUTTON	ACTION
	Create or Add a new item
	Delete current item
	Edit an existing item
	Display reference selector
	Display calendar menu bar
	Navigate to first page
	Navigate to previous page
	Navigate to next page
	Navigate to last page
	Move an item
	Void an item
	Go back

Search	Display a search field
Reset	Refresh to current date OR clear data entered into a search field
Check In	Check in an Inventory item
Clear	Clear inventory sales list
Check In	Check in a booking
Print	Print
Append Quantity	Add Inventory Quantity
Report Loss	Subtract Inventory Quantity
$Make Payment	Make a payment
$ View Payment	View a payment
$ Edit Debt Allowance	Edit Customer Debt Allowance
$ Edit In-Store Credit	Edit Customer Credit and Hours
Show Credit History	View Customer Credit
Show POS History	View Customer payment history
Close Shift	Close user shift
Open Shift	Open user shift
Preview Close	Preview unclosed transactions
Close Cash	Close transactions

A majority of the data are stored and shown to users as a list. Users can sort data according to columns by *double clicking* column headings.

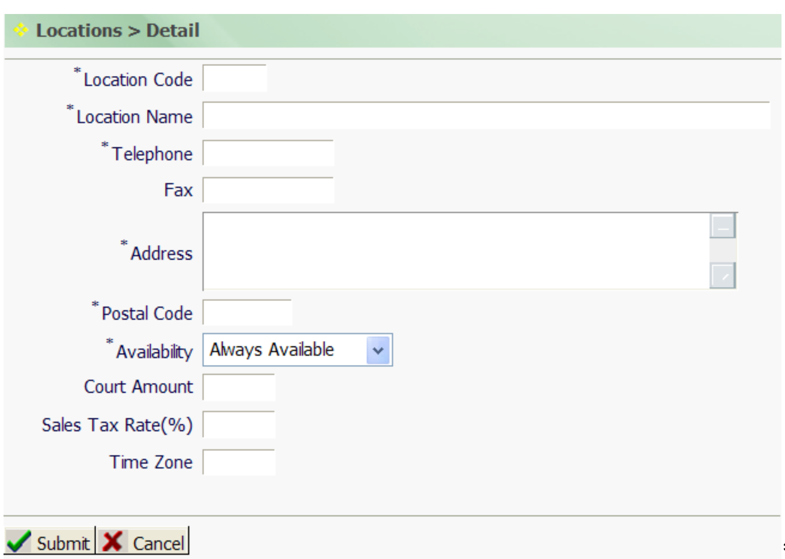
MOVIDIA ERP2.0 SYSTEM SET UP

There are a few essential items that users must set up before use. The initial set-up involves adding basic information on business Locations and Staff, and setting up Lesson and Payroll Rates. System set-up is performed under Management.



How to Add a Location

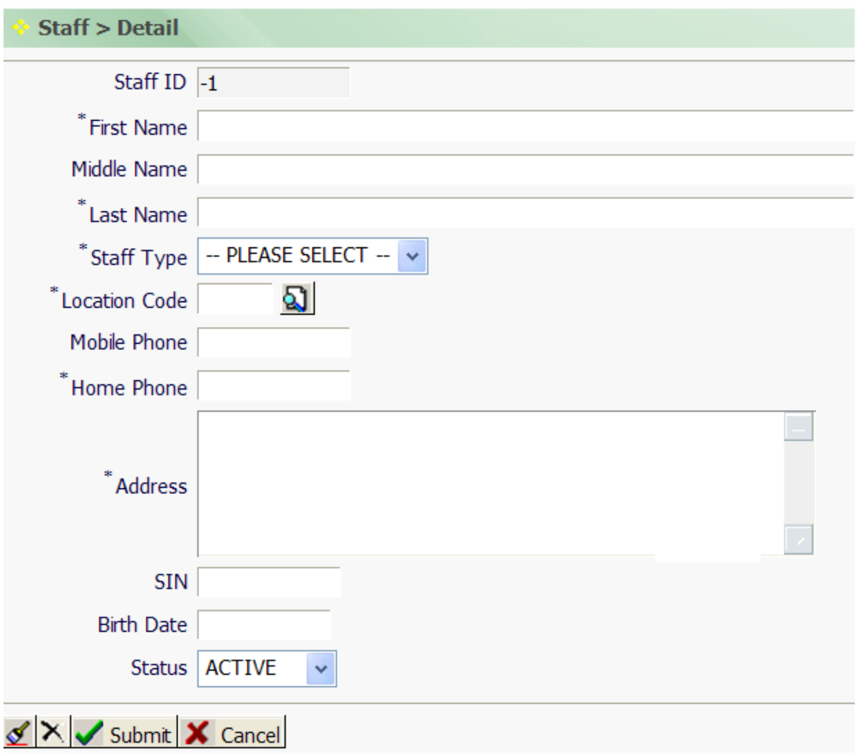
- Select “Management (M)” from the top menu, and click **Location**.
- Click . This will display a page for users to enter Location details.
- Enter a **Location Code** (must be 4 characters) and the **Location Name**.
- Enter the Location **Telephone** number, **Address**, and **Postal Code**.
- Indicate the Location **Availability** from the drop down menu. This will indicate when a Location is available for contact (Always Available, Scheduled Available, or Non-Available).
- The number of courts at the Location can be indicated in **Court Amount**.
- Add the **Sales Tax Rate (%)** and **Time Zone**.
- Click **Submit**.
- Repeat to add another Location.



* Indicates required field

How to Add a Staff Member

- Select “Management (M)” from the top menu, and click **Staff**.
- Click . This will display a page for users to enter Staff details.
- Type in the **First Name** and **Last Name**. A Middle Name can also be included.
- Select the **Staff Type** (Coach, Cashier, Office Staff, or Manager) from the drop down menu (*Note: It is important to select an appropriate “Staff Type” as some functions are made restricted or unavailable for certain user types).*
- Click and select a **Location Code** from the list.
- Enter a **Mobile Phone** number and **Home Phone** number.
- Type in an **Address**.
- Enter a **SIN**, and **Birth Date** for the Staff Member.
- Select “ACTIVE” for **Status**.
- Click **Submit**.
- Repeat to add another Staff Member.



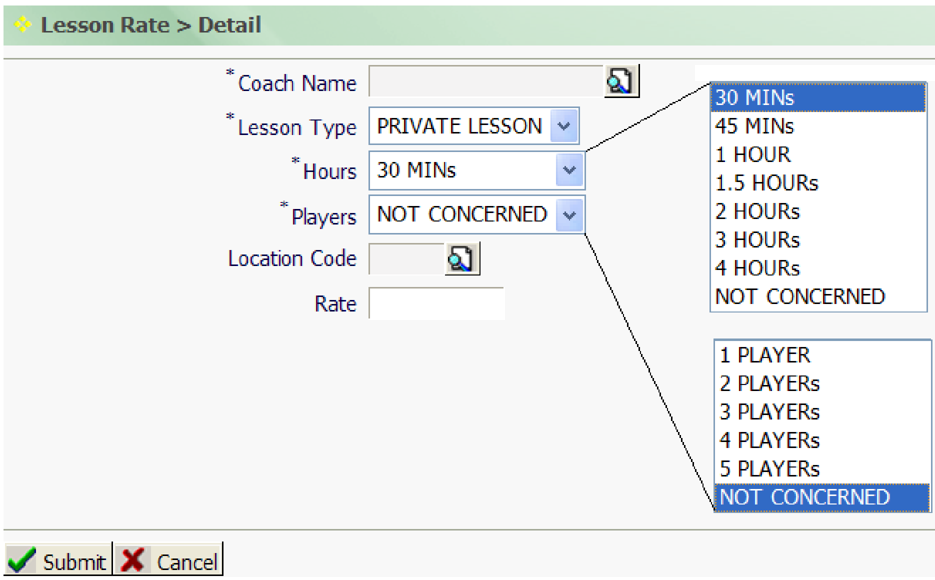
* Indicates required field

How to Add Private Lesson Rates

Once Coaches are added as Staff, Private Lesson Rates can be entered into the system (See “How to add a Staff Member” above).

- Select “Management (M)” from the top menu, and click **Lesson Rates**.
- Click .
- Search for a Coach Name by clicking and making a selection. **Submit**.

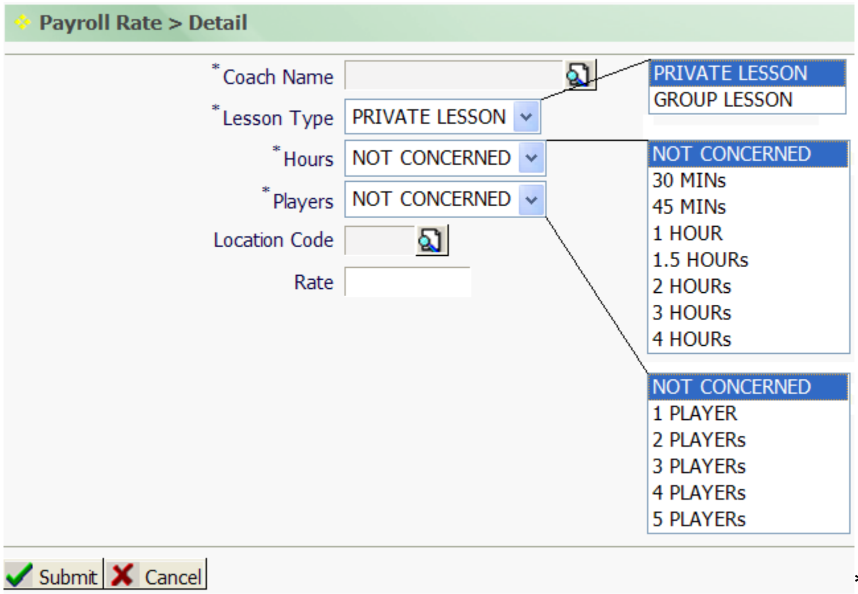
- Indicate the lesson **Hours**, and the number of students (**Players**) by selecting from the drop down menus. If the Lesson Rate is not dependant on the number of students, select “NOT CONCERNED”.
- Enter the **Location** (**Code**) for the lesson by clicking .
- Type in a **Rate** (*Note: The Rate in this field is representative of the amount students are charged for the lesson. See below on setting Payroll Rates for Coaches).*
- **Submit**.
- Repeat to add another Lesson Rate.



* Indicates required field

How to Add Coach Payroll Rates

- Select “Management (M)” from the top menu, and click **Payroll Rates**.
- Click .
- Search for a Coach Name by clicking and making a selection. **Submit**.
- Select whether Coach Payroll is for a “PRIVATE LESSON” or “GROUP LESSON” (**Lesson Type**).
- Select the number of **Hours** and the number of **Players** (students) the rate is based on.
- Enter the **Location** (**Code**) for the lesson by clicking .
- Type in the Coach Payroll **Rate**.
- **Submit**.
- Repeat to add another Payroll Rate.



* Indicates required field

How to Edit a Location

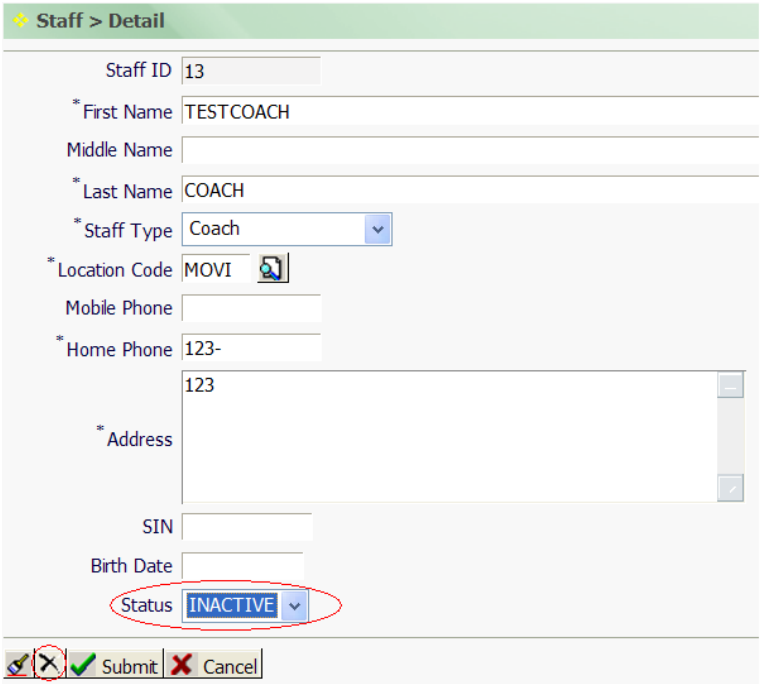
- Select “Management (M)” from the top menu, and click **Location**.
- From the list, click a Location. A “Locations > Detail” page will be displayed.
- Click .
- Edit Location **Name**, **Contact**, **Address**, **Availability**, **Court Amount**, **Tax Rate**, and/or **Time Zone**.
- **Submit** to save changes.

How to Edit a Staff Member

- Select “Management (M)” from the top menu, and click **Staff**.
- Click the **First Name** of the Staff Member. A “Staff > Detail” page will be displayed for the Staff Member.
- Click .
- Edit **Name**, **Contact**, **Staff Type**, **Address**, **SIN**, and/or **Birth Date**.
- **Submit** to save changes.

How to Remove a Staff Member

- Select “Management (M)” from the top menu, and click **Staff**.
- Click the **First Name** of the Staff Member. A “Staff > Detail” page will be displayed for the Staff Member.
- Click . Change the **Status** of the Staff Member from “ACTIVE” to **“INACTIVE”** using the drop down menu. And **Submit**.
  OR
- Click (Staff Member Status will automatically be changed to “INACTIVE”).



How to Edit Private Lesson Rates

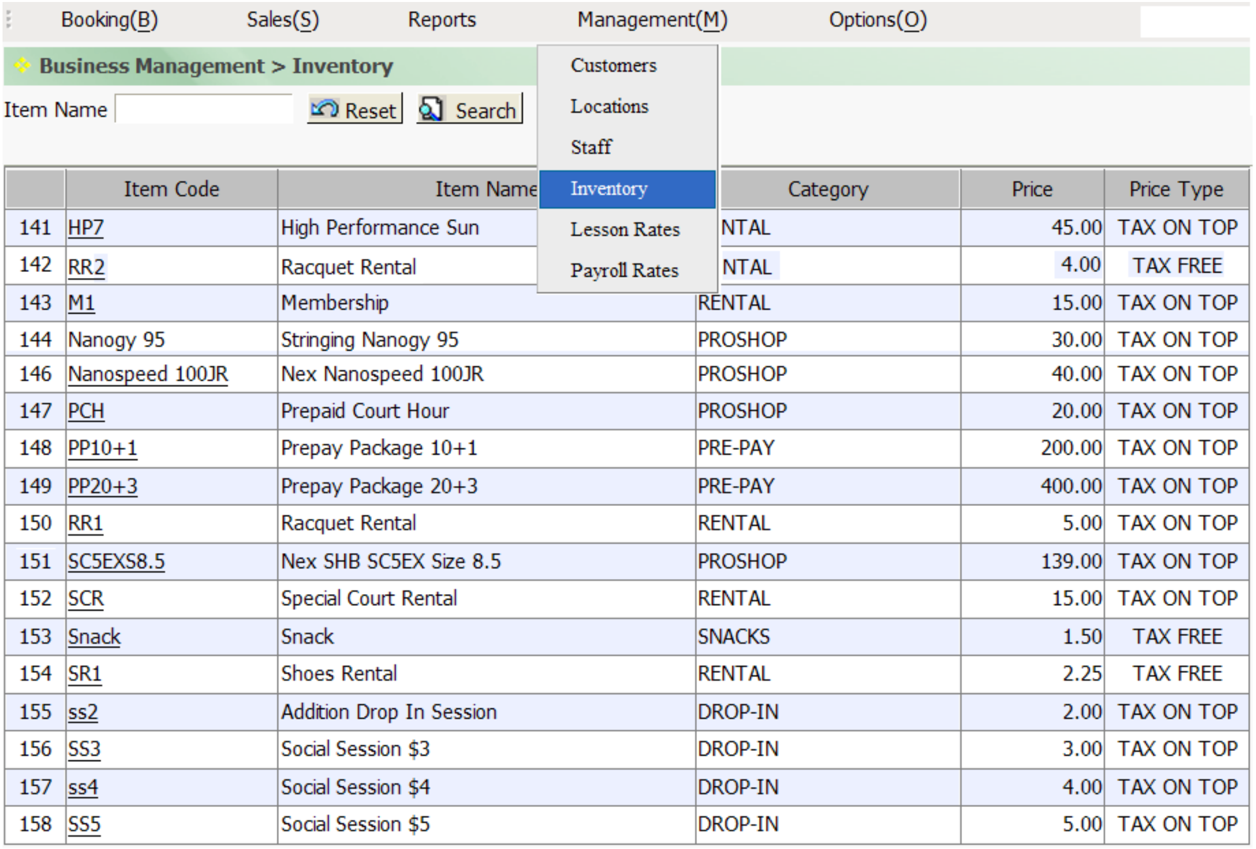
- Select “Management (M)” from the top menu, and click **Lesson Rates**.
- Click on the **Coach Name**.
- Click .
- Make changes to **Hours**, (number of) **Players**, **Location**, and/or **Rates**.
- **Submit**.

How to Edit Payroll Rates

- Select “Management (M)” from the top menu, and click **Payroll Rates**.
- Locate a coach and click on the **Coach Name**.
- Click .
- Make changes to **Lesson Type**, **Hours**, (number of) **Players**, **Location**, and/or **Rates**.
- **Submit**.

INVENTORY MANAGEMENT

The Inventory is composed of a list of sales items in which users can control, sell and examine visually. Sales items can include Drop-ins (*i.e.* single/ multi-package passes), pro shop products, and/or other miscellaneous items (*i.e.* drinks, shoe rental, etc.). The price or rate of these sales items are managed manually by users. *Regular* court rental rates are stored in pre-set mode and are shown to users as default values. However, under Inventory Management, users can create *other* court rental rates or packages (*i.e.* family membership rate/package) for their business.



Booking(B) Sales(S) Reports Management(M) Options(O)

Business Management > Inventory

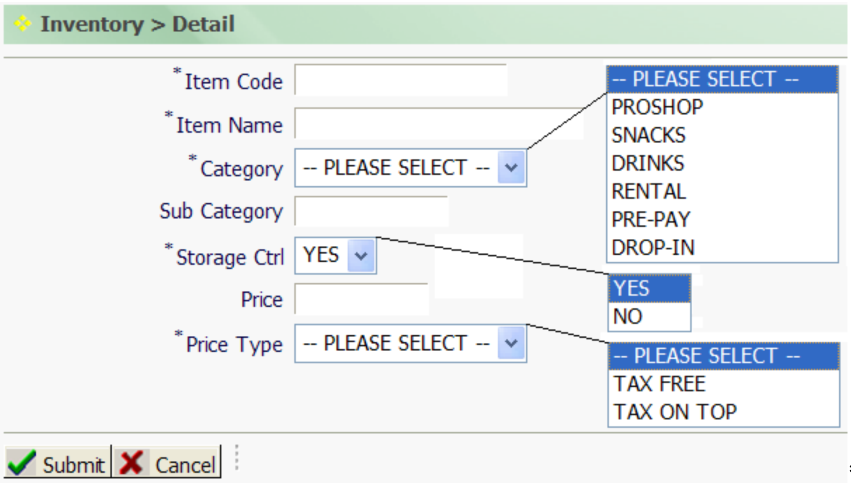
Customers
Locations
Staff
Inventory
Lesson Rates
Payroll Rates

Item Name [ ] Reset Search

	Item Code	Item Name	Category	Price	Price Type
141	HP7	High Performance Sun	NTAL	45.00	TAX ON TOP
142	RR2	Racquet Rental	NTAL	4.00	TAX FREE
143	M1	Membership	RENTAL	15.00	TAX ON TOP
144	Nanogy 95	Stringing Nanogy 95	PROSHOP	30.00	TAX ON TOP
146	Nanospeed 100JR	Nex Nanospeed 100JR	PROSHOP	40.00	TAX ON TOP
147	PCH	Prepaid Court Hour	PROSHOP	20.00	TAX ON TOP
148	PP10+1	Prepay Package 10+1	PRE-PAY	200.00	TAX ON TOP
149	PP20+3	Prepay Package 20+3	PRE-PAY	400.00	TAX ON TOP
150	RR1	Racquet Rental	RENTAL	5.00	TAX ON TOP
151	SC5EXS8.5	Nex SHB SC5EX Size 8.5	PROSHOP	139.00	TAX ON TOP
152	SCR	Special Court Rental	RENTAL	15.00	TAX ON TOP
153	Snack	Snack	SNACKS	1.50	TAX FREE
154	SR1	Shoes Rental	RENTAL	2.25	TAX FREE
155	ss2	Addition Drop In Session	DROP-IN	2.00	TAX ON TOP
156	SS3	Social Session $3	DROP-IN	3.00	TAX ON TOP
157	ss4	Social Session $4	DROP-IN	4.00	TAX ON TOP
158	SS5	Social Session $5	DROP-IN	5.00	TAX ON TOP

How to Add an Inventory Item

- Select “Management (M)” from the top menu, and click **Inventory**
- Click . This will display a page for users to submit Inventory Details.
- Type in an **Item Code** (*Note: Use product barcodes for pro shop items).*
- Type in an **Item Name**.
- Determine the item **Category** from the drop down menu (Proshop, Snacks, Drinks, Rental, Pre-pay (package), Drop-in). *(Note: Users can contact Movidia system providers for additional categories to be added)*
- If necessary, items can be designated a **Sub Category**.
- Indicate **Storage Ctrl** (control)
  - Select “YES” for items that are maintained on stock records (*i.e.* Pro shop products).
  - Select “NO” for items that are not maintained on stock records (*i.e.* Drop-in passes).
- Enter an item **Price**.
- Indicate whether the item is “TAX FREE” or “TAX ON TOP” by selecting a **Price Type** from the drop down menu.



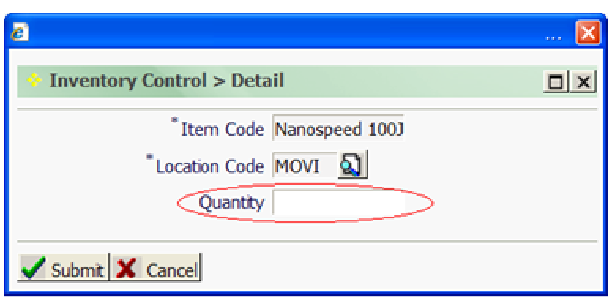
*Indicates required field

For items NOT maintained on stock records (Storage Ctrl – NO)

- Click **Submit** to add item (*IMPORTANT:* Item Codes cannot be altered after submission. Ensure that the item code is correct before submitting).

For items maintained on stock records (Storage Ctrl - YES)

- Click **Submit** to add item (*IMPORTANT:* Item Codes cannot be altered after submission. Ensure that the item code is correct before submitting).
- Once the item is added, users are required to enter Detailed Inventory Control Information.
    - Insert the quantity of an item by clicking **Append Quantity**.
    - Indicate the **Location** using .
    - Type in the **Quantity**.



- **Submit**.
- Repeat steps to insert the item quantity for other business locations.

How to Edit an Inventory Item

- Select "Management (M)" from the top menu, and click **Inventory**
- Locate the item by page number or search by typing in the Item Name. Select the **Item Code**.

- Click . This will display a page for users to edit Inventory Details.
- Make changes to **Item Name**, **Category**, **Sub Category**, **Storage Ctrl** selection, **Price**, and/or **Price Type**.
- **Submit** to save changes.

How to Update Inventory Records

Products added to an Inventory or lost from an Inventory need to be manually recorded by users. Inventory items that are sold to customers are automatically updated (reduced from stock records).

- Select “Management (M)” from the top menu, and click **Inventory**.
- Locate the item by page number or search by typing in the Item Name. Select the **Item Code**.

How to *increase* the stock quantity of an item

- Click **Append Quantity**
- Indicate the **Location**.
- Type in the **Quantity** added.
- **Submit**.

How to *decrease* the stock quantity of an item

- Click **Report Loss**
- Indicate the **Location**.
- Type in the **Quantity** lost.
- **Submit**.

How to View Inventory Sales History

- Select “Management (M)” from the top menu, and click **Inventory**
- Locate the item by page number or search by typing an Item Name. Select the **Item Code**.
- Click **Show History**. An “Inventory Control > History” page will be displayed.

Inventory Control > History

	Item Code	Location Code	Operation	Quantity	Date	Time	Operator
1	008235000161	CALG	SALE	1.00	2012-08-30	17:01	super
2	008235000161	CALG	SALE	1.00	2012-08-30	16:56	super
3	008235000161	CALG	SALE	1.00	2012-08-24	14:34	super

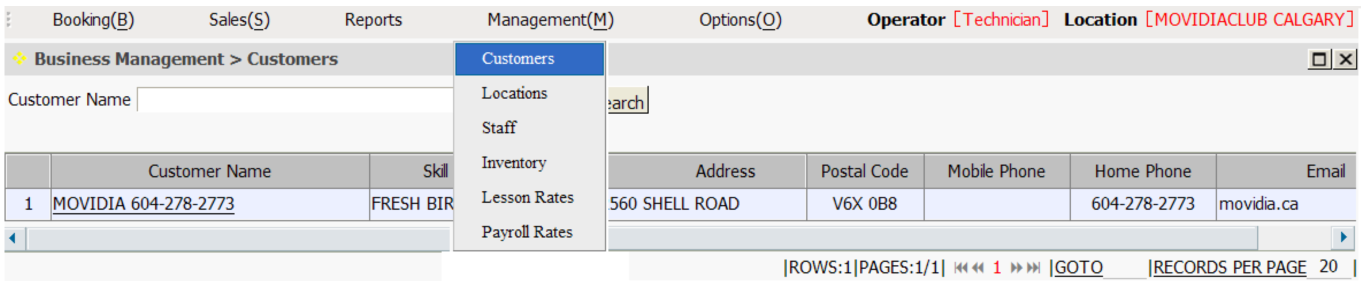
|ROWS:34|PAGES:1/2| 1 |GOTO |RECORDS PER PAGE 20

Cancel

In the Inventory Control History, users can view all transaction records and transaction dates/times for a sale item. The Staff Member (Operator) is also recorded for each sale.

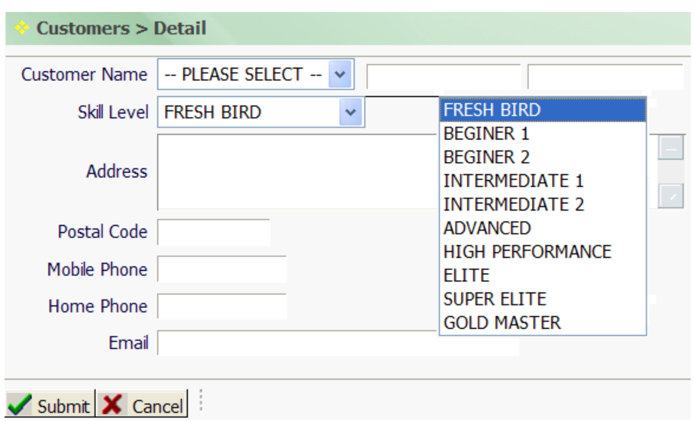
CUSTOMER MANAGEMENT

Users must create a Customer Account before making a booking, sale, or enrolling a customer for a Group or Private Lesson. Customer Accounts help users to keep track of customers, store customer information, and record payments made by each customer. Creating Customer Accounts also allow users to manage customer Debt Allowance and prepaid Hours or Credits.



How to Add a Customer

- Select "Management (M)" from the top menu, and click **Customers**.
- Click . A "Customers > Detail" page will be displayed for users to submit Customer information.
- Select a **Marital Status** and type in **Customer Name**.
- If the Customer is a student, indicate a **Skill Level** (this can be updated later). Otherwise, use the default "FRESH BIRD" setting.
- Type in Customer **Address**, and **Postal Code**
- Type in contact information – **Home/Mobile Phone** and **Email**.
- Click **Submit** to store Customer information.

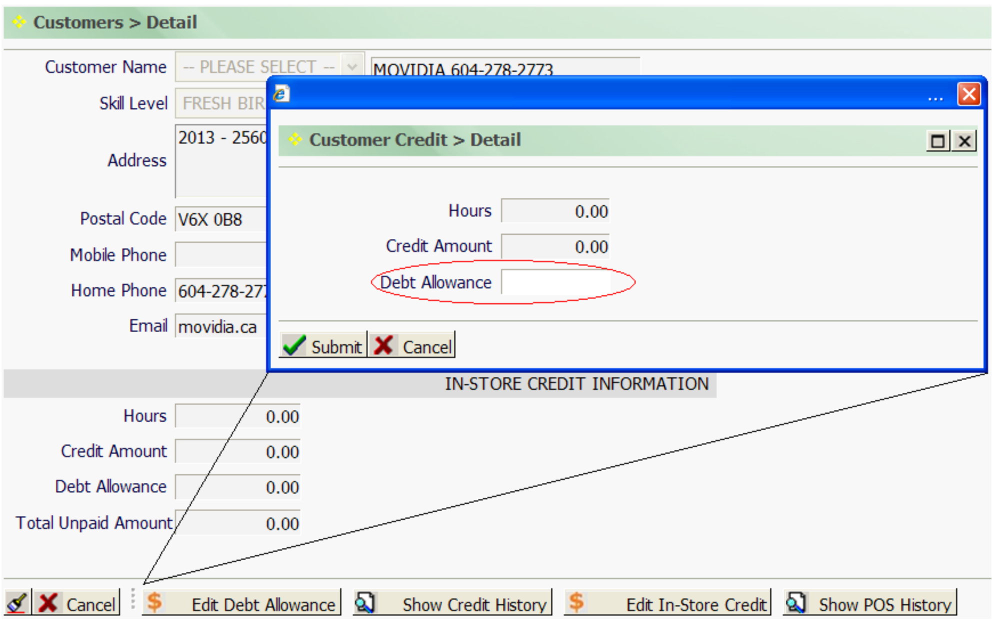


How to Edit Customer Information

- Select "Management (M)" from the top menu, and click **Customers**.
- Locate the Customer. **Search** by typing into the "Customer Name" field box.
- Click the **Customer Name**.
- Click .
- Make changes and **Submit**.

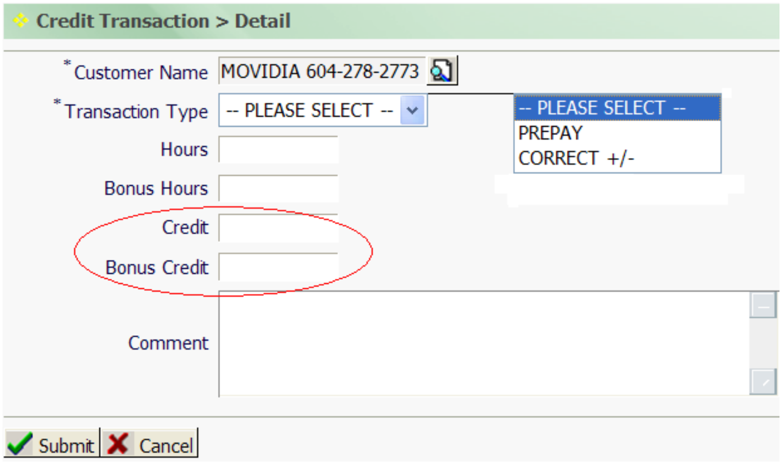
How to Manage Customer Debt Allowance

- Select “Management (M)” from the top menu, and click **Customers**.
- Select a **Customer Name** or **Search** by clicking .
- Debt Allowance can be viewed under “In-store Credit Information”.
- To add a Debt Allowance, or make changes to an existing Debt Allowance, click **Edit Debt Allowance**.
- Type in the **Debt Allowance** amount.
- **Submit** *(Note: This function is restricted for managerial use only)*.



How to Manage Customer Credit

- Select “Management (M)” from the top menu, and click **Customers**.
- Select a **Customer Name** or **Search** by clicking .
- Credit Amount can be viewed under “In-store Credit Information”.
- To make changes to Customer Credit, click **Edit In-Store Credit**.
- Indicate the **Transaction Type**.
  - Select “PREPAY” for credit prepayments.
  - Select “CORRECT +/- ” to make credit adjustments.
- In the **Credit** field box, type in the amount (of credit) you wish to *prepay* or *add*. OR type in the amount you wish to *subtract*. Place a (-) negative value in front for subtractions (*i.e.* -50).
- If applicable, enter the (number of) **Bonus Credit**(s).
- Add a **Comment**.
- **Submit**. If the Transaction Type is a “PREPAY”, users will be directed to make a payment. See “How to Make a Pre-payment” for more instructions.



How to Manage Customer Hours

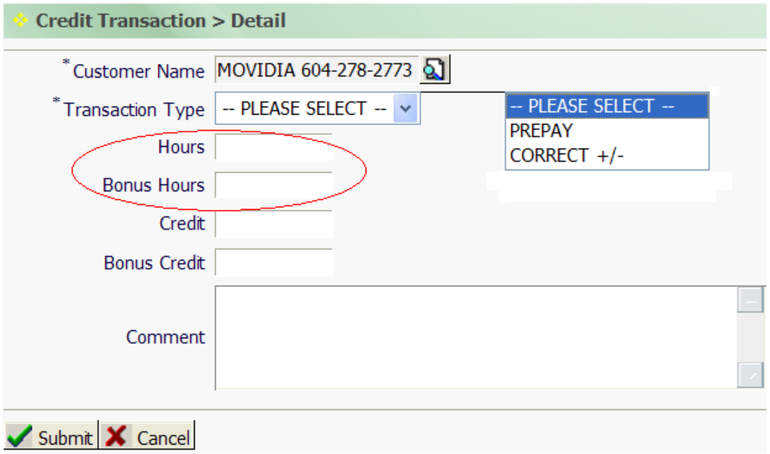
- Select “Management (M)” from the top menu, and click **Customers**.
- Select a **Customer Name** or **Search** by clicking .
- Customer Hours can be viewed under “In-store Credit Information”. This amount represents the number of hours a customer can use towards court rentals.
- To make changes to customer hours, click **Edit In-Store Credit**.
- Indicate the **Transaction Type**.
  - Select “PREPAY” for hours prepayments.
  - Select “CORRECT +/- ” to make adjustments to hours.

If the Transaction Type is a “PREPAY”

- In the **Hours** field box, type in the amount of hours to be prepaid.
- Enter a **Prepay Rate** (Rate per hour).
  - If the rate is at *Regular* (*i.e.* 18/hour), leave this field blank. The rate will automatically be calculated based on the default settings.
- If applicable, enter the (number of) **Bonus Hour**(s).
- **Submit**.
- A message may appear to confirm the action. Click **OK**.
- Users will be directed to make a payment. See “How to Make a Pre-payment” for more instructions.

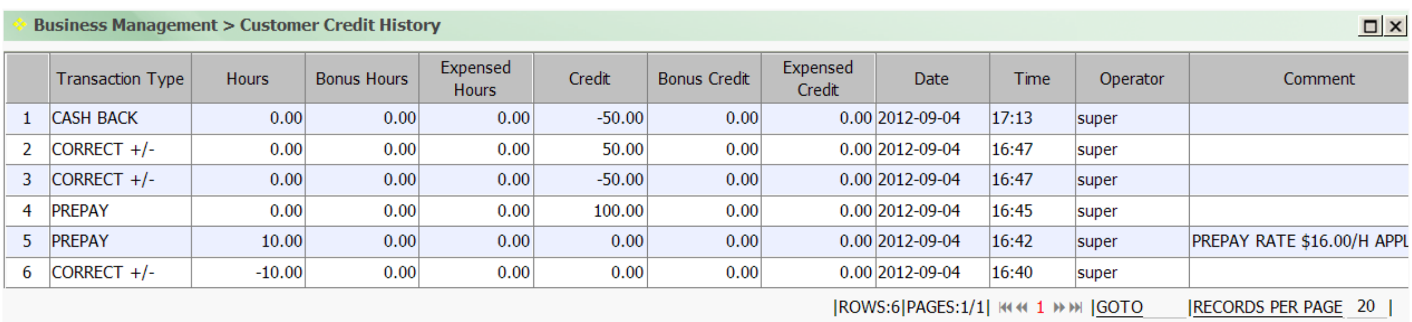
If the Transaction Type is a “CORRECT +/-“

- In the **Hours** field box (or **Bonus Hours** for bonuses), type in the amount (of hours) you wish to *add*. OR type in the amount you wish to *subtract*. Place a (-) negative value in front for subtractions (*i.e.* -10).
- Add a **Comment**.
- **Submit**.



How to View Customer Credit History

- Select "Management (M)" from the top menu, and click **Customers**.
- Select a **Customer Name** or **Search** by clicking .
- Click **Show Credit History**. A Customer Credit History page will be displayed.



Business Management > Customer Credit History

	Transaction Type	Hours	Bonus Hours	Expensed Hours	Credit	Bonus Credit	Expensed Credit	Date	Time	Operator	Comment
1	CASH BACK	0.00	0.00	0.00	-50.00	0.00	0.00	2012-09-04	17:13	super	
2	CORRECT +/-	0.00	0.00	0.00	50.00	0.00	0.00	2012-09-04	16:47	super	
3	CORRECT +/-	0.00	0.00	0.00	-50.00	0.00	0.00	2012-09-04	16:47	super	
4	PREPAY	0.00	0.00	0.00	100.00	0.00	0.00	2012-09-04	16:45	super	
5	PREPAY	10.00	0.00	0.00	0.00	0.00	0.00	2012-09-04	16:42	super	PREPAY RATE $16.00/H APPL
6	CORRECT +/-	-10.00	0.00	0.00	0.00	0.00	0.00	2012-09-04	16:40	super	

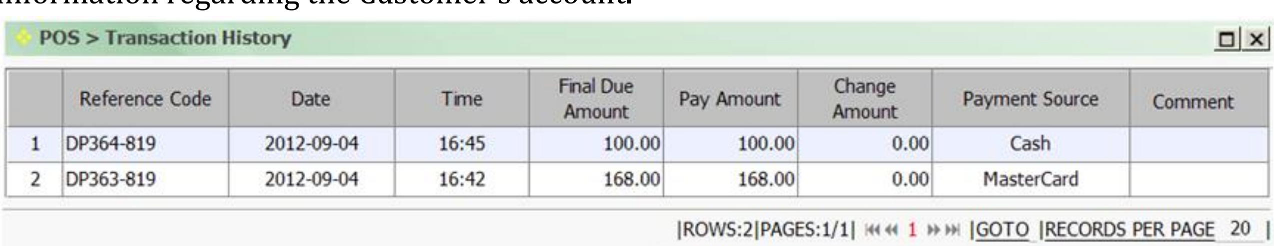
|ROWS:6|PAGES:1/1| 1 |GOTO |RECORDS PER PAGE 20 |

In the Customer Credit History, users can view information regarding the Customer's Credit account, including hour/credit prepays, hour/credit corrections, credit refunds (cash back), and dates and times of individual transactions. The Operator, as well as any comments are also displayed.

How to View Customer POS History

- Select "Management (M)" from the top menu, and click **Customers**.
- Select a **Customer Name** or **Search** by clicking .
- Click **Show POS History**.

In the Customer POS Transaction History, users can view detailed payment and refund information regarding the Customer's account.



POS > Transaction History

	Reference Code	Date	Time	Final Due Amount	Pay Amount	Change Amount	Payment Source	Comment
1	DP364-819	2012-09-04	16:45	100.00	100.00	0.00	Cash	
2	DP363-819	2012-09-04	16:42	168.00	168.00	0.00	MasterCard	

|ROWS:2|PAGES:1/1| 1 |GOTO |RECORDS PER PAGE 20 |

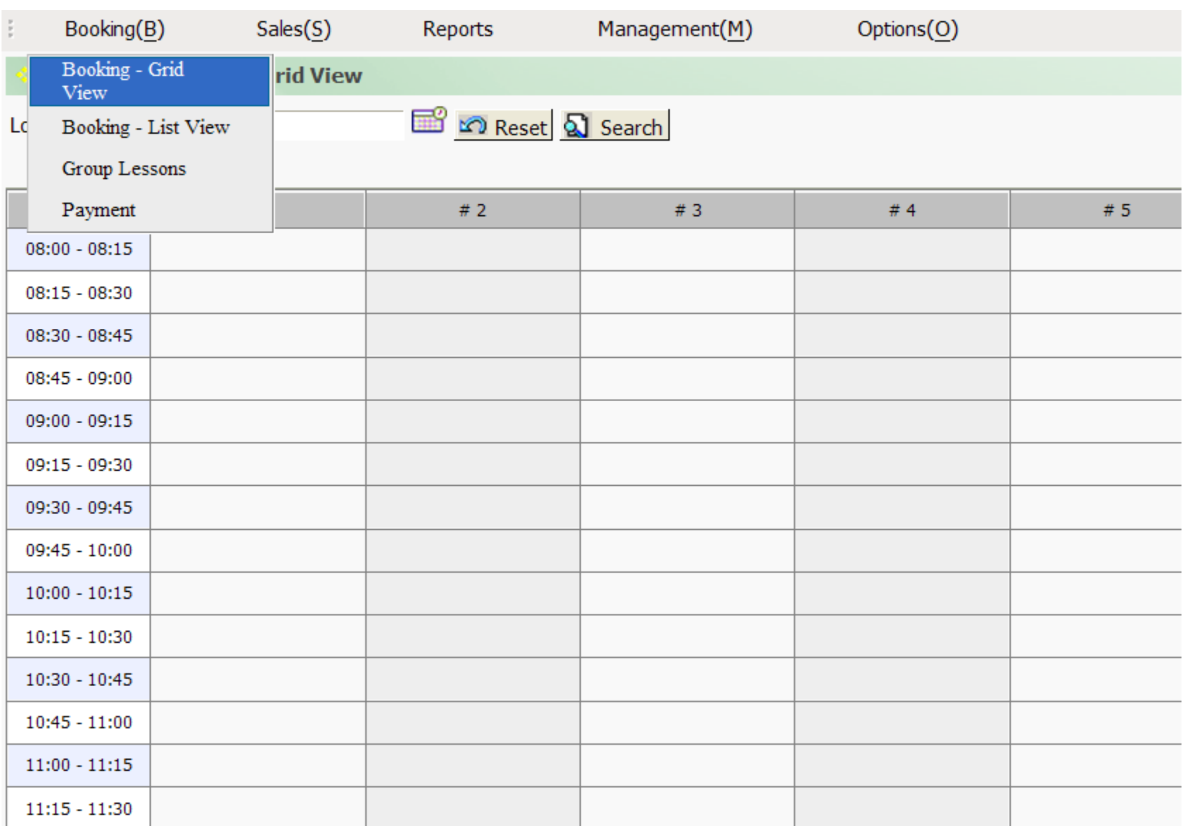
COURT BOOKING

There are two ways to view Bookings. Bookings can be viewed under the **Grid View**, or **List View** (See images below). The Grid View user interface (UI) allows users to view all court bookings for a single day. The Grid View UI is color-coded based on court status (*i.e.* paid, unpaid, cancelled, etc) and is convenient for viewing court booking details. The List View UI allows users to view court bookings for multiple days. The List View UI display variable amounts of data and is convenient for browsing all current and previous bookings. Users can add, or make changes to bookings on both Grid and List Views.

How to View Court Bookings

By Grid View

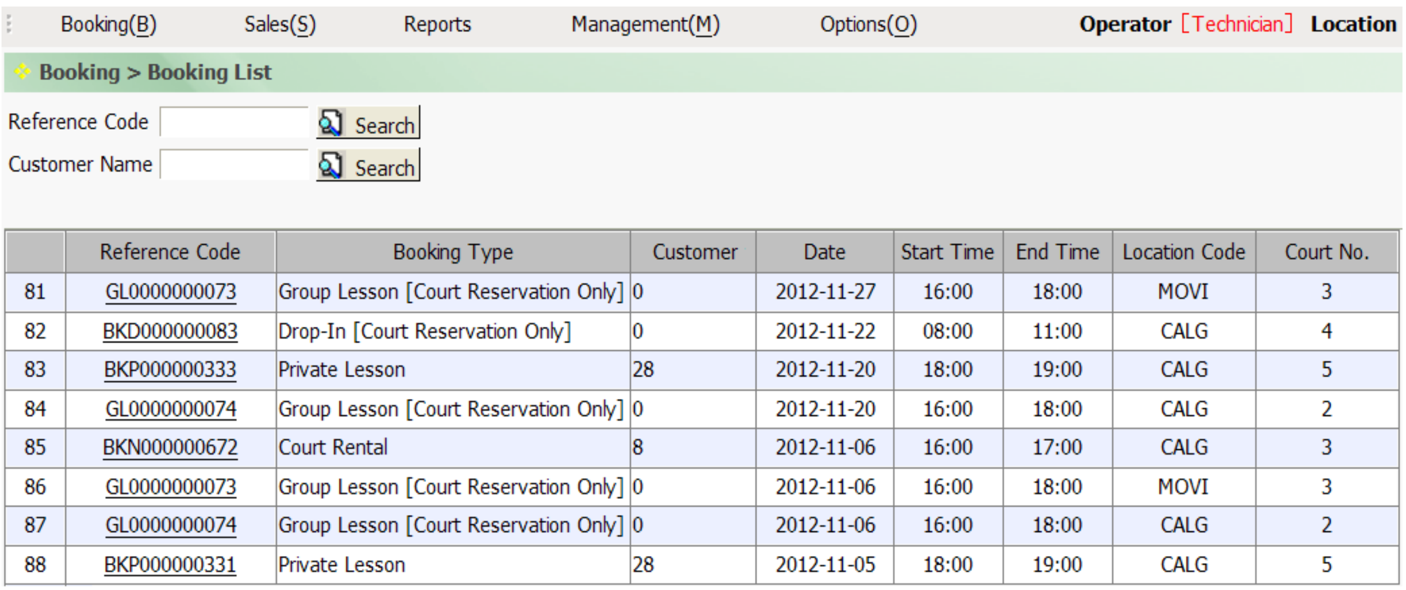
- Select “Booking (B)” from the top menu, and click **Booking - Grid View**.
- This will direct users to see bookings for the *current date*.
- To view bookings for another date, select , and then choose a **Date** (year, month, day) from the drop down calendar.
- To return to bookings for the current date, click **Reset**.



The Grid View UI is color-coded based on the booking status. See the “Colour Code Key for Grid View” at the end of the reference guide.

By List View

- Select “Booking (B)” from the top menu, and click **Booking - List View**.
- To find a booking by reference code, type in a code in the **Reference Code** bar, and click **Search**.
- To find a booking by customer name, type in a name in the **Customer Name** bar, and click **Search**.
- Otherwise, scroll through the bookings using the navigation bar.



	Reference Code	Booking Type	Customer	Date	Start Time	End Time	Location Code	Court No.
81	GL0000000073	Group Lesson [Court Reservation Only]	0	2012-11-27	16:00	18:00	MOVI	3
82	BKD000000083	Drop-In [Court Reservation Only]	0	2012-11-22	08:00	11:00	CALG	4
83	BKP000000333	Private Lesson	28	2012-11-20	18:00	19:00	CALG	5
84	GL0000000074	Group Lesson [Court Reservation Only]	0	2012-11-20	16:00	18:00	CALG	2
85	BKN000000672	Court Rental	8	2012-11-06	16:00	17:00	CALG	3
86	GL0000000073	Group Lesson [Court Reservation Only]	0	2012-11-06	16:00	18:00	MOVI	3
87	GL0000000074	Group Lesson [Court Reservation Only]	0	2012-11-06	16:00	18:00	CALG	2
88	BKP000000331	Private Lesson	28	2012-11-05	18:00	19:00	CALG	5

How to Add a New Booking – Court Rental and Private Lesson

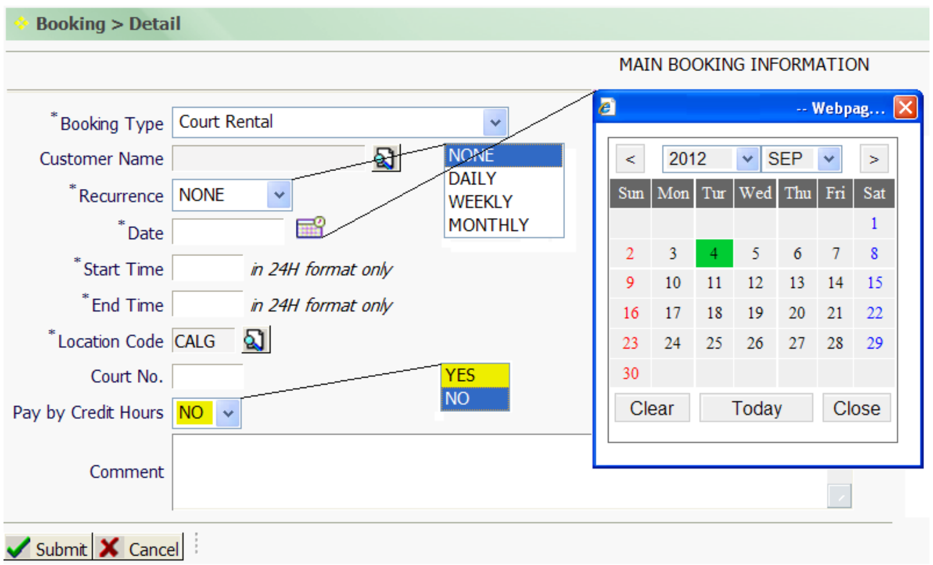
- Select “Booking (B)” from the top menu, and click **Booking - Grid View**.
- Click . This will display a page for users to submit booking details.
- Select the **Booking Type** (Court Rental OR Private Lesson) from the drop down menu.
- Click to insert a **Customer Name**. A window will be displayed. Select a customer or look for one using **Search**.
- If the booking is recurrent, indicate whether it is “**Daily”, “Weekly”**, or “**Monthly”** by selecting from the drop down menu. If the booking is not recurrent, select “**None**”.

(IMPORTANT: Daily, Weekly, and Monthly recurrences are preset configurations. By default, they are set at 30 days, 52 weeks, and 12 months. These numbers cannot be changed by users. Users must contact Movidia system providers to have these settings changed)

- Choose a **Date** by clicking .
- Enter a **Start Time** and **End Time** (Use a 24-hour time notation in the form hh:mm).
- Next to “Location Code”, select a location by clicking .
- Enter a **Court Number**.

If the Booking Type is a *Court Rental*

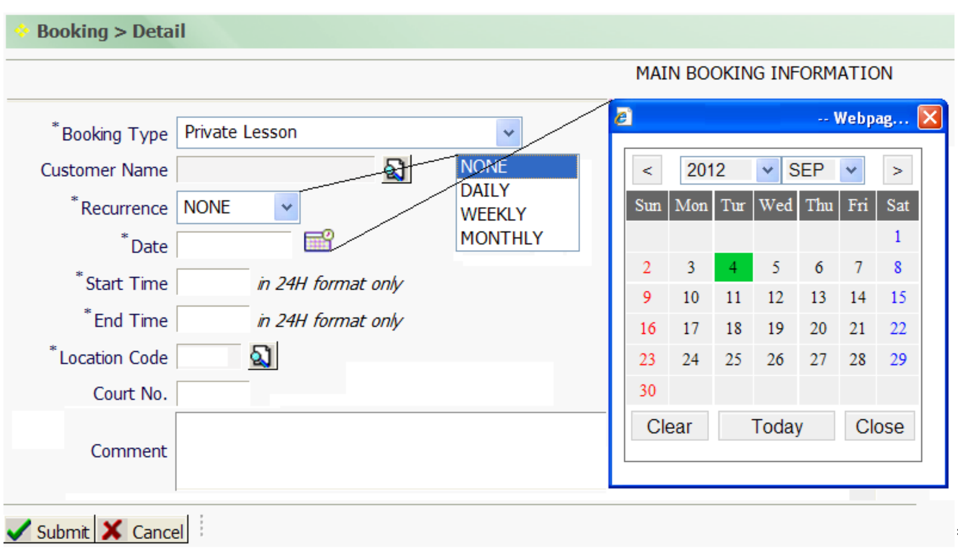
- Indicate whether the booking will be paid "…by **Credit Hours**" by selecting "YES" or "NO".
- Add a **Comment**.
- Click **Submit** to complete the booking.
- If the Court Rental is not recurrent, users will immediately be directed to a "POS > Make Payment" page. **Make a Payment** (See "How to Make a Court Rental Payment") OR **Close the Window** to make the payment later.



*Indicates required field

If the Booking Type is a *Private Lesson*

- Add a **Comment**.
- Click **Submit** to complete the Private Lesson booking.



*Indicates required field

Users will be directed to a “Coach Booking > Detail” page.

*Indicates required field

- Click next to “Coach ID”. Select a Coach from the list and click **Submit**.
- The **Lesson Code** can be left blank.
- Indicate the “**Player Number**” (number of students) by making a selection from the drop down menu.
- **Submit**. If the lesson is not recurrent, users will immediately be directed to a “POS > Make Payment” page. **Make a Payment** (See “How to Make a Private Lesson Payment”) OR **Close the Window** to make the payment later.

How to Edit a Court Booking – Court Rental and Private Lesson

- Select “Booking (B)” from the top menu, and click **Booking - Grid View** or **Booking – List View**.
- Select the booking **Reference Code** (*i.e.* BK000359). OR click anywhere in the booking cell box (for Grid View only).
- A “Booking > Detail” page will be displayed. Click Move
- Make changes to **Booking Type**, **Date**, **Start**/**End Time**, and/or **Court No.**
- **Submit**.

How to Cancel a Court Booking – Court Rental and Private Lesson

- Select “Booking (B)” from the top menu, and click **Booking - Grid View** or **Booking – List View**.
- Select the booking **Reference Code** (*i.e.* BK000359). OR click anywhere in the booking cell box (for Grid View only).

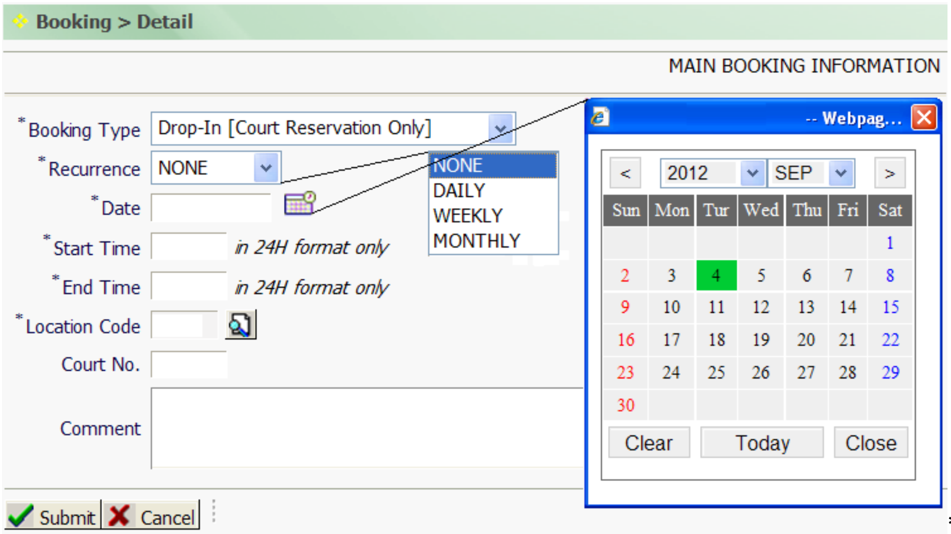
- A “Booking > Detail” page will be displayed. Click VOID *(Note: Court Rental and Private Lesson bookings cannot be cancelled once the session time has started or passed)*.
- Two messages will be displayed to confirm the action. Select **OK** twice.
- If the booking is recurrent, an additional message will be displayed.
    - Select **Cancel** to cancel the selected booking ONLY.
    - Select **OK** to cancel the booking AND all the related onward bookings.
- Refunds will automatically be credited back to Customers in the form of in-store Credit. To refund the credit amount, see “How to Refund Customer Credit to an Original Payment”.

How to Add a New Booking – Drop-in

- Select “Booking (B)” from the top menu, and click **Booking - Grid View** or **Booking – List View**.
- Click . This will display a page for users to submit booking details.
- Select “Drop-in [Court Reservation Only]” for the **Booking Type** from the drop down menu.
- If the drop-in is recurrent, indicate whether it is **“Daily”, “Weekly”**, or “**Monthly”** by selecting from the drop down menu. If the drop-in is not recurrent, select “**None**”.

(IMPORTANT: Daily, Weekly, and Monthly recurrences are preset configurations. By default, they are set at 30 days, 52 weeks, and 12 months. These numbers cannot be changed by users. Users must contact Movidia system providers to have these settings changed)

- Choose a **Date** by clicking .
- Enter a **Start Time** and **End Time** (Use a 24-hour time notation in the form hh:mm).
- Next to “Location Code”, select a location by clicking .
- Enter a **Court Number**.
- Click **Submit** to complete the booking.
- Repeat to reserve an additional court for Drop-in.



*Indicates required field

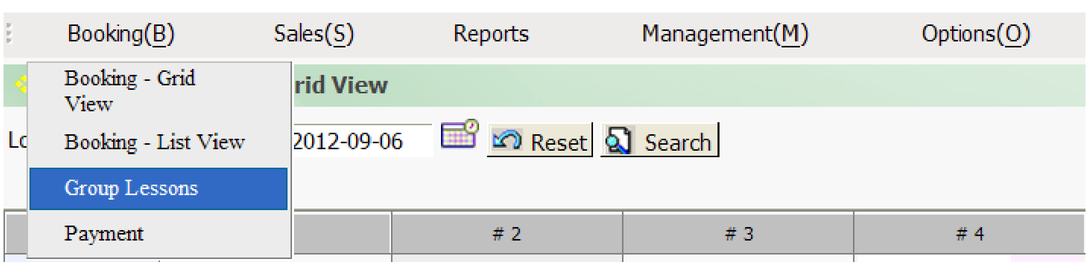
How to Edit a Court Booking – Drop-in

- Select "Booking (B)" from the top menu, and click **Booking - Grid View** or **Booking – List View**.
- Select the booking **Reference Code** (*i.e.* BK000359). OR click anywhere in the booking cell box (for Grid View only).
- A "Booking > Detail" page will be displayed. Click .

- Make changes to the **Date**, **Start/End Time**, and/or **Court No.**
- **Submit**.

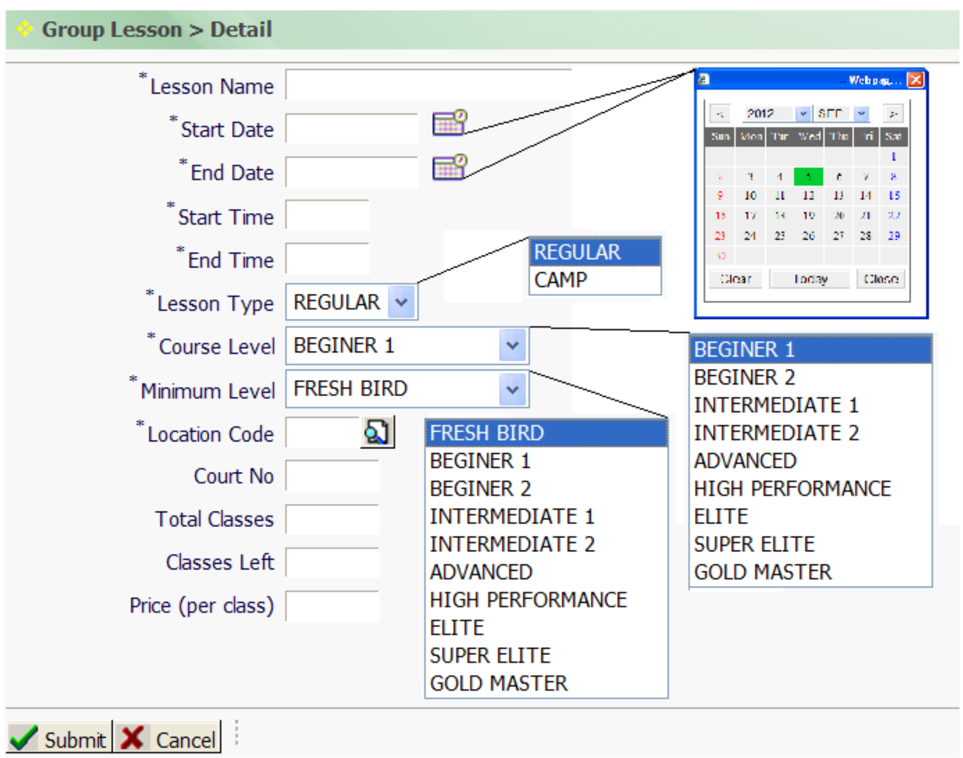
How to Add a New Booking – Group Lesson

- Select "Booking (B)" from the top menu, and click **Group Lesson**.



- Click . This will display a page for users to submit Group Lesson booking details.
- Enter a **Lesson Name** (*IMPORTANT:* Do NOT create a Lesson Name with apostrophes or quotation marks).
- Choose a **Start Date** and **End Date** by clicking .
- Enter a **Start Time** and **End Time** (Use a 24-hour time notation in the form hh:mm).
- Select a **Lesson Type** from the drop down menu.
    - Select "CAMP" for lessons that recur daily.

- Select “REGULAR” for lessons that recur weekly.
- Select a **Course Level** from the drop down menu.
- Indicate a **Minimum Level** by selecting a level from the drop down menu *(Note: Students added to this lesson will be required to meet the minimum skill level. See “How to Edit Customer Information” for instructions on updating skill levels).*
- Next to “Location Code”, select a **Location** by clicking .
- Enter a **Court Number**. Only one Court Number can be entered. If an additional court is required, see “How to Add a Court to a Group Lesson” below.
- Enter the **Total** (number of) **Classes**, and **Classes Left**.
- Type in a Lesson **Price** (per class).
- Click **Submit** to complete the booking *(Note: Lesson Type, Course/Minimum Level, and Location cannot be changed once the Group Lesson is added. Be sure to check that the information is correct before submitting).*



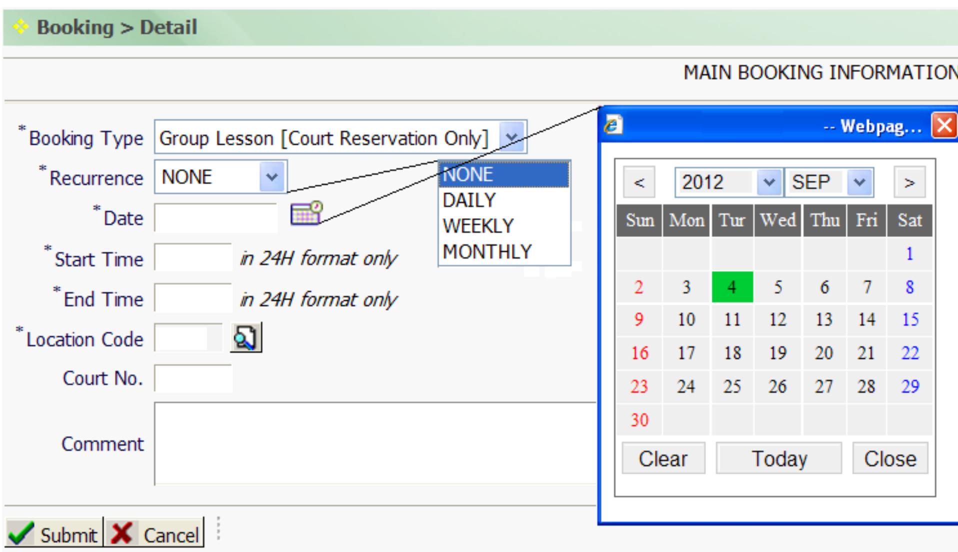
*Indicates required field

- Once a Group Lesson booking is complete, the Group Lesson will be given a unique Lesson Code. Add Coaches and Students to the Group Lesson (See “How to Add a Coach to a Group Lesson” and “How to Add a Student to a Group Lesson”)

How to Add an Extra Court to a Group Lesson

- Select “Booking (B)” from the top menu, and click **Booking - Grid View** or **Booking – List View**.

- Click . This will display a page for users to submit booking details.
- Under “Booking Type”, select **“Group Lesson [Court Reservation Only]**” from the drop down menu.
- If the Group Lesson is recurrent (and you want an additional court for every session), select **“Daily”, “Weekly”**, or “**Monthly”** from the drop down menu. Otherwise, select “**None**” to add the court for only one session.
- Select the (Start) **Date** of the Group Lesson by clicking .
- Enter the Group Lesson **Start Time** and **End Time**. Use a 24-hour time notation in the form hh:mm.
- Next to “Location Code”, select a location by clicking .
- Enter a **Court Number**.
- Add a **Comment**.
- **Submit** to add court.



*Indicates required field

How to Edit General Group Lesson Information

General Group Lesson Information include Lesson Name, (number of) Classes Left, and Price (per class).

- Select “Booking (B)” from the top menu, and click **Group Lesson**.
- Select the Group Lesson you want to make changes to from the “Lesson Code” column.
    - A Group Lesson can also be selected by clicking the **Lesson Code** (*i.e.* GL000065) from the Grid View.
- A “Group Lesson > Detail” page will be displayed. Click .
- Change the **Lesson Name**, (number of) **Classes Left** and/or **Price** (per class).
- **Submit**.

How to Edit Group Lesson Date/Time

- Select “Booking (B)” from the top menu, and click **Group Lesson**.
- Select the Group Lesson you want to make changes to from the “Lesson Code” column. A “Group Lesson > Detail” page will be displayed.
    - A Group Lesson can also be selected by clicking the **Lesson Code** (*i.e.* <u>GL000065</u>) from the Grid View.
- Scroll down and select the **Date** you want to make changes to.
- A “Booking > Detail” page will be displayed. Click Move.
- Type in a new **Date**, **Start Time**, and/or **End Time** by highlighting the entire segment.
- Make changes and **Submit**.

How to Edit Group Lesson Court No.

- Select “Booking (B)” from the top menu, and click **Group Lesson**.
    - Select the **Lesson Code** for the Group Lesson you want to make changes to *(Note: The Lesson Code is a unique code that help users identify different Group Lessons).*
- OR Select the **Lesson Code** (*i.e.* <u>GL000065</u>) from the Grid View.
- A “Group Lesson > Detail” page will be displayed.
- Scroll down and select the **Date** you want to make change to.
- A “Booking > Detail” page will be displayed. Click Move.
- Type in a new **Court No.** by highlighting the entire segment.
- **Submit**.

How to Cancel a Group Lesson

- Select “Booking (B)” from the top menu, and click **Group Lesson**.
- Select the Group Lesson from the “Lesson Code” column
    - A Group Lesson can also be selected by clicking the **Lesson** or **Reference Code** (*i.e.* <u>GL000065</u>) from the Grid View or List View.

To Cancel the *Entire* Group Lesson

- Click .
- Confirm the cancellation by selecting **OK**.
- Refunds will automatically be credited back to Customers (students) in the form of in-store Credit. To refund the credit amount, see “How to Refund Customer Credit to an Original Payment”.

To Cancel *One* Group Lesson Session

- Scroll down and select the Group Lesson **Date** you want to delete.
- Click VOID.
- Confirm the cancellation by selecting **OK**.
- Refunds will automatically be credited back to Customers in the form of in-store Credit. To refund the credit amount, see “How to Refund Customer Credit to an Original Payment”.

How to Add a Coach to a Group Lesson

- Select “Booking (B)” from the top menu, and click **Group Lesson**.
- Select the Group Lesson you want to add a Coach to from the “Lesson Code” column. A “Group Lesson > Detail” page will be displayed.

To Add a Coach for *All* the Group Lesson Sessions

- Scroll down. Next to “Coaches for this Lesson”, click . Choose a **Coach** from the list and **Submit**.
- Repeat to add another Coach to the Group Lesson.

Group Lesson > Detail

COACHES FOR THIS LESSON

	Coach Name	Date	Start Time	End Time
no data				

To Add a Coach into *One* Group Lesson Session

- Scroll down and select the **Date** you want to add to.

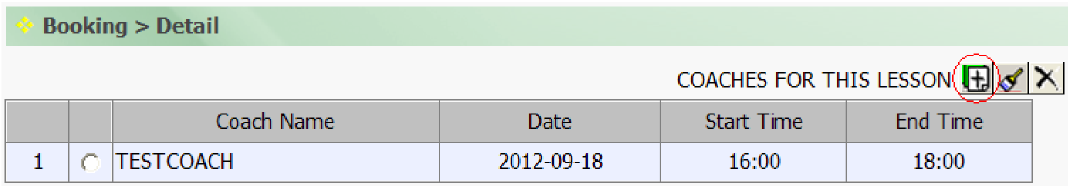
Group Lesson > Detail

Price (per class) 30.00

CLASSES OF THIS LESSON

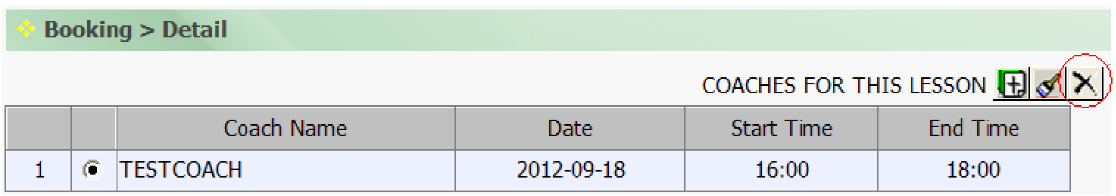
	Date	Start Time	End Time	Court No.	Status
1	2012-08-28	16:00	18:00	3	Confirmed
2	2012-09-04	16:00	18:00	3	Confirmed
3	2012-09-11	16:00	18:00	3	Confirmed
4	2012-09-18	16:00	18:00	3	Confirmed
5	2012-09-25	16:00	18:00	3	Confirmed
6	2012-10-02	16:00	18:00	3	Confirmed

- A “Booking > Detail” page will be displayed. Next to “Coaches for this Lesson”, click . Choose a **Coach** to add from the list and **Submit**.



How to Remove a Coach from a Group Lesson

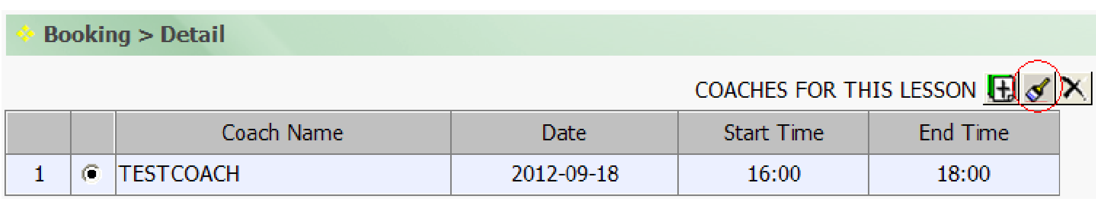
- Select "Booking (B)" from the top menu, and click **Group Lesson**.
- Select the Group Lesson you want to remove a Coach from by selecting a **Lesson Code**.
  A "Group Lesson > Detail" page will be displayed.
- Scroll down and select the **Date** you want to remove a Coach from.
  A "Booking > Detail" page will be displayed.
- Scroll down. Select a Coach and click next to "Coaches for this Lesson".



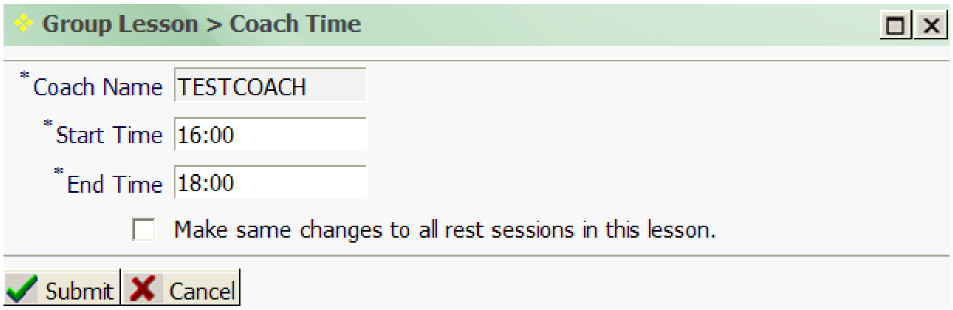
- A confirmation message will be displayed. Select **OK**.

How to Edit a Coach in a Group Lesson

- Select "Booking (B)" from the top menu, and click **Group Lesson**.
- Select the Group Lesson to make changes to by selecting a **Lesson Code**.
- Scroll down and select the **Date** you want to edit a Coach from.
  A "Booking > Detail" page will be displayed.
- Scroll down. Select a Coach and click next to "Coaches for this Lesson".

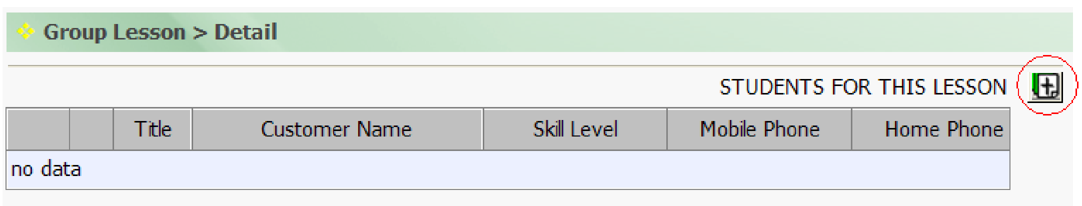


- Edit **Start** and/or **End Time**.
- Select the box to make changes to all Group Lesson sessions.
- **Submit**.

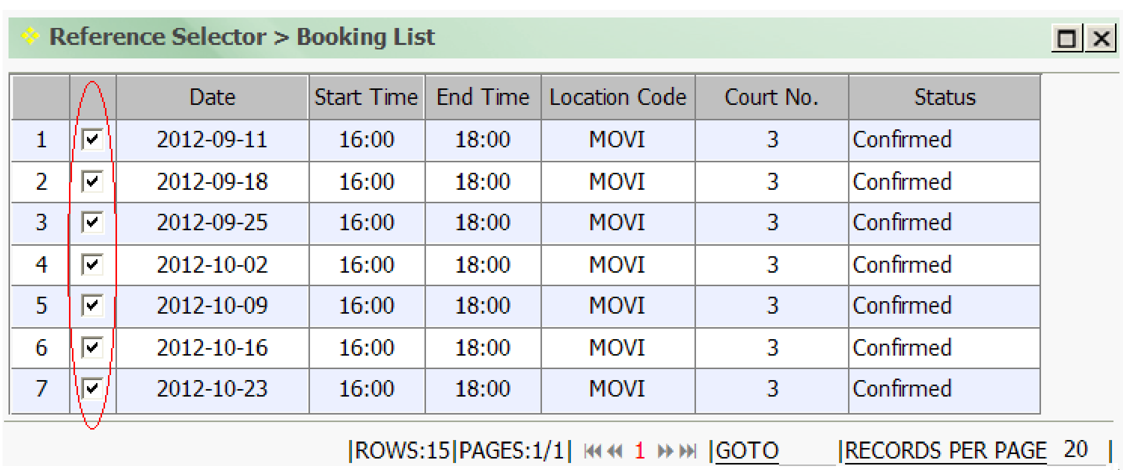


How to Add a Student to a Group Lesson

- Select "Booking (B)" from the top menu, and click **Group Lesson**.
- Select the Group Lesson you want to add a student to from the "Lesson Code" column.
- Next to "Students for this Lesson", click .
- Select a **Student** from the Customer List window, and **Submit**.
  (Note: Students have to meet the minimum skill level requirement in order to be added).



- Select the class or classes to enroll the student to from the Reference Selector. **Submit**.


Reference Selector > Booking List

		Date	Start Time	End Time	Location Code	Court No.	Status
1	☑	2012-09-11	16:00	18:00	MOVI	3	Confirmed
2	☑	2012-09-18	16:00	18:00	MOVI	3	Confirmed
3	☑	2012-09-25	16:00	18:00	MOVI	3	Confirmed
4	☑	2012-10-02	16:00	18:00	MOVI	3	Confirmed
5	☑	2012-10-09	16:00	18:00	MOVI	3	Confirmed
6	☑	2012-10-16	16:00	18:00	MOVI	3	Confirmed
7	☑	2012-10-23	16:00	18:00	MOVI	3	Confirmed

|ROWS:15|PAGES:1/1| 1 |GOTO |RECORDS PER PAGE 20 |

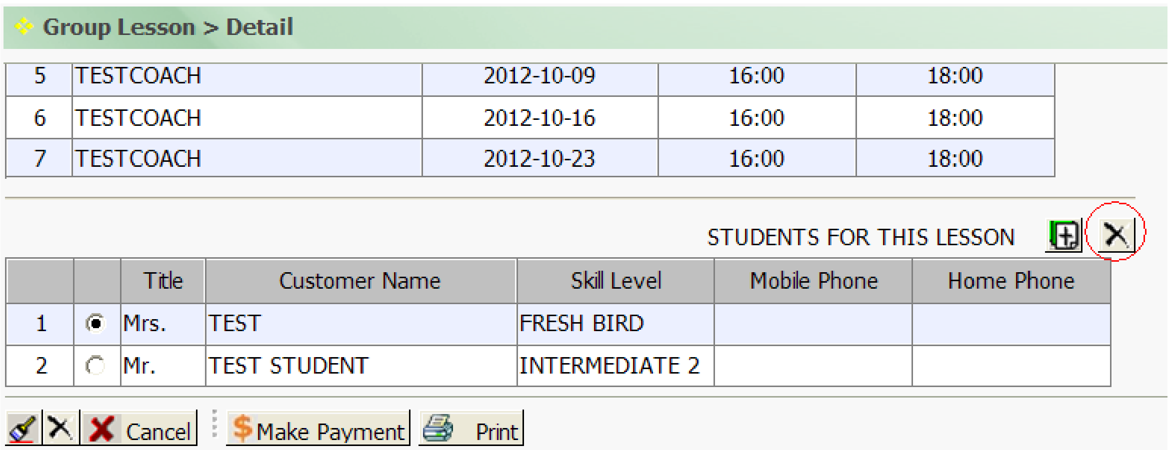
- Users will be directed to a "POS > Make Payment" page. To **Make a Payment**, see "How to Make a Group Lesson Payment". OR **Close the Window** to make the payment later.
- Repeat to add another Student to the Group Lesson.

How to Remove a Student from a Group Lesson

- Select “Booking (B)” from the top menu, and click **Group Lesson**.
- Select the Group Lesson you want to remove a student from by selecting a **Lesson Code**. A “Group Lesson > Detail” page will be displayed.

To Remove a Student from *All* of the Group Lesson sessions

- Scroll down. Select a Student and click next to “Students for this Lesson”.


Group Lesson > Detail

5	TESTCOACH	2012-10-09	16:00	18:00
6	TESTCOACH	2012-10-16	16:00	18:00
7	TESTCOACH	2012-10-23	16:00	18:00

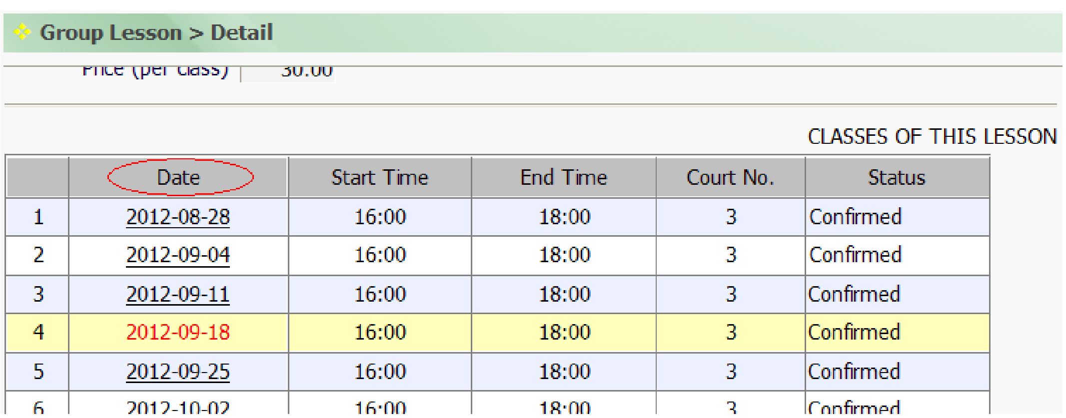
STUDENTS FOR THIS LESSON

		Title	Customer Name	Skill Level	Mobile Phone	Home Phone
1	◉	Mrs.	TEST	FRESH BIRD		
2	○	Mr.	TEST STUDENT	INTERMEDIATE 2		

- A confirmation message will be displayed. Select **OK**.
  (Note: Refunds will automatically be credited back to customer (student) credit accounts. See “How to Refund Credit to Original Payment”).

To Remove a Student from *One* Group Lesson

- Scroll down and select the **Date** you want to remove from.


Group Lesson > Detail

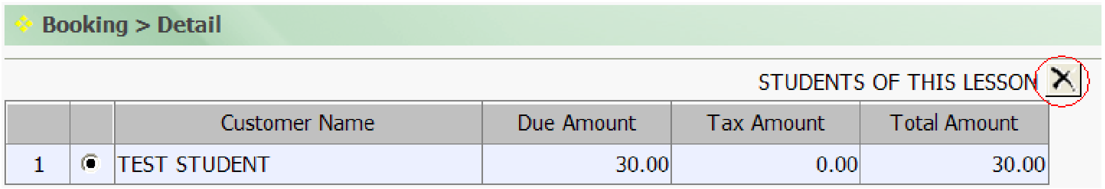
Price (per class) 30.00

CLASSES OF THIS LESSON

	Date	Start Time	End Time	Court No.	Status
1	2012-08-28	16:00	18:00	3	Confirmed
2	2012-09-04	16:00	18:00	3	Confirmed
3	2012-09-11	16:00	18:00	3	Confirmed
4	2012-09-18	16:00	18:00	3	Confirmed
5	2012-09-25	16:00	18:00	3	Confirmed
6	2012-10-02	16:00	18:00	3	Confirmed

A “Booking > Detail” page will be displayed.

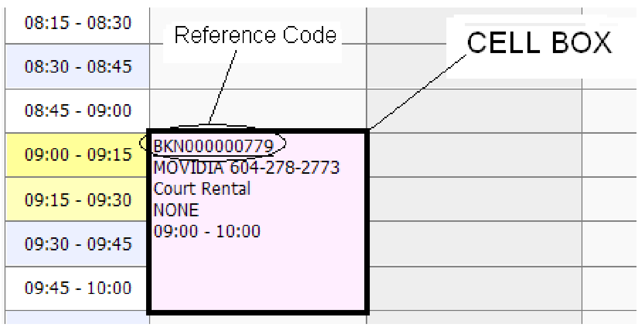
- Scroll down. Select a Student and click next to “Students for this Lesson”.



- A confirmation message will be displayed. Select **OK**. *(Note: A Refund for that session will automatically be credited back to the customer's credit account).*

How to Check-in a Court Booking

- Select "Booking (B)" from the top menu, and click **Booking - Grid View**
- Click anywhere on the Court Booking cell box *except* on the Lesson Code (*i.e.* GL000065) or Reference Code (*i.e.* BKD000068).



- Click the **Check In** button. The court booking will automatically change colors to show current status. See "Color Code Key for Grid View"
  (Note: Once a booking is checked in, only the court number can be changed).

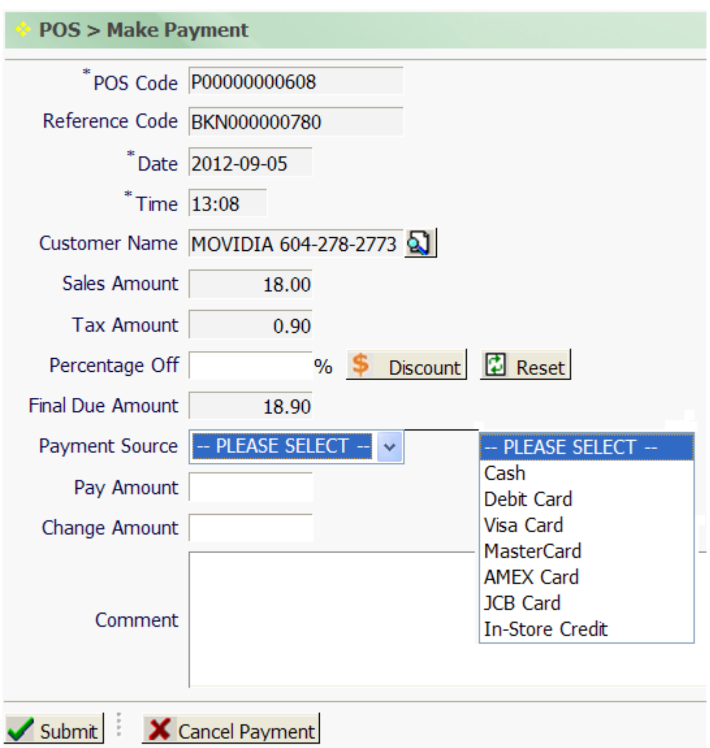
***(*IMPORTANT:* Check-ins for court bookings need to be made in order for in-store credits to be deducted and coach payrolls to be calculated. Users have a grace period of *30 days* to perform all check-ins).

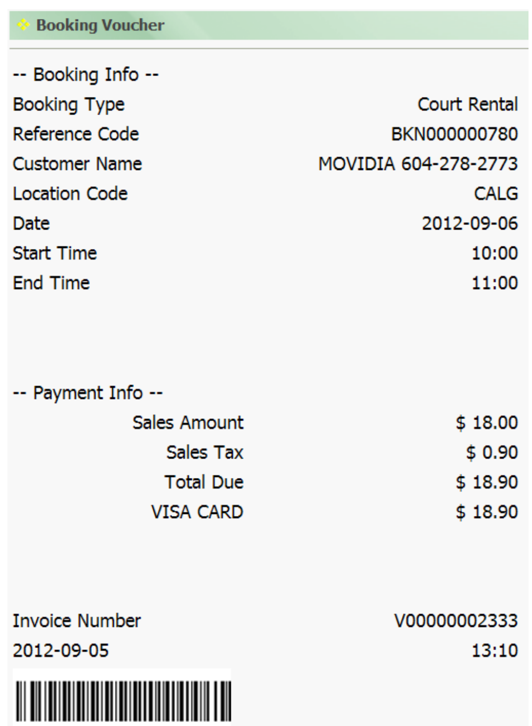
PAYMENT

Regular Court Rental rates are pre-set in the system. Private and Group Lesson rates differ depending on the duration of the lesson and the Coach. Payments for Drop-ins, Proshop products, *Special* Court Rental Rates (Rates below regular *i.e.* family membership rates), and other miscellaneous items (*i.e.* drink/shoe rental, etc.) are set by users in *Inventory Management*. These payments are made under *Inventory Sales*. Credit and Hour pre-payments by customers are managed under *Customer Accounts*.

How to Make a Regular Court Rental Payment

- Select “Booking (B)” from the top menu, and click **Booking - Grid View**
- Click anywhere on the Court Rental (or Private Lesson) cell box.
  A “Booking > Detail” page will be displayed.
- Click the **View Payment** button. This will direct users to the “Customer > Detail” page. *(Note: If a payment has already been received, the payment information will be displayed on this page. Cancel to go back.)*
- Click the **Make Payment** button.
- A message will be displayed to confirm the procedure. Click **OK**.
- The sales amount will automatically be displayed. To make adjustments, enter the **Percentage Off**, and click **Discount**.
- Select the **Payment Method**.
- Enter the amount paid by typing into the **Pay Amount** field.
- Click on the **Change Amount** text box (Change will automatically be calculated).
- Leave a **Comment**.
- **Submit** payment. If the payment needs to be split, see “How to Make a Split payment”.
- A receipt (“Booking Voucher”) will be displayed. **Close the window** OR **Print**.
  (Note: Court Rentals can be paid by customers through batch payments. See “How to Make a Batch Payment” below).



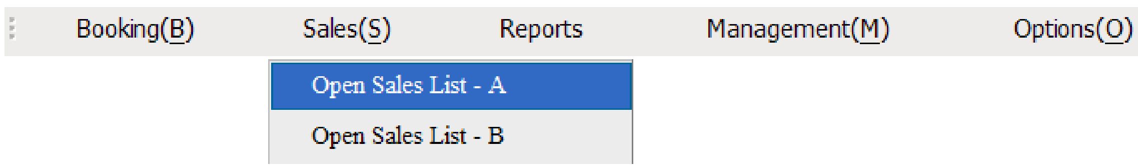


How to Make a Private Lesson Payment

- See “How to Make a Regular Court Rental Payment” above.
  (Note: Private Lessons can be paid by customers though batch payments. See “How to Make a Batch Payment” for instructions)

How to Make an Inventory Payment

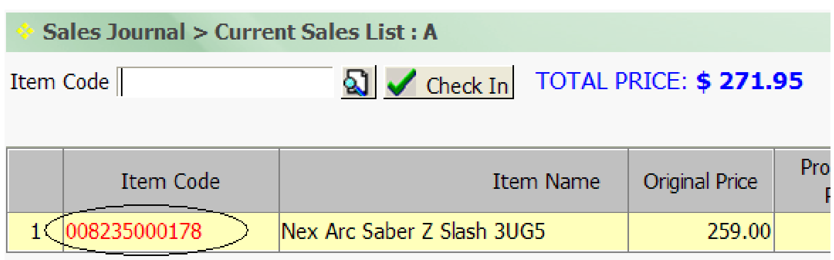
- Select “Sales (S)” from the top menu, and click **Open Sales List – A** OR **Open Sales List – B**.
  (Note: List A and List B are no different. The two lists simply allow users to perform sales transactions for different customers simultaneously).



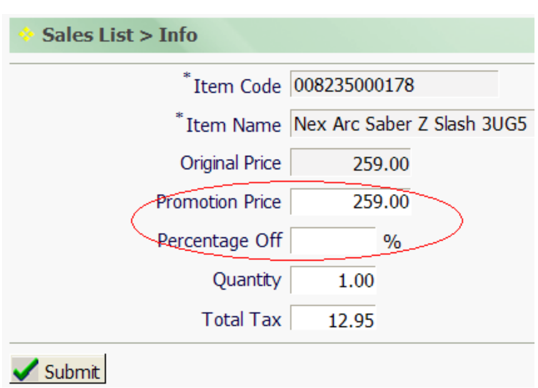
- Insert the **Item Code**. Click , select an item, and **Submit**. OR scan the **Item Code** (product barcode) into the system.
- Click the **Check In** button.

For Price Adjustments

- Click on the **Item Code**.



- Type in a **Promotion Price** OR percentage discount (**Percentage Off**). **Submit** and the price will automatically be adjusted.



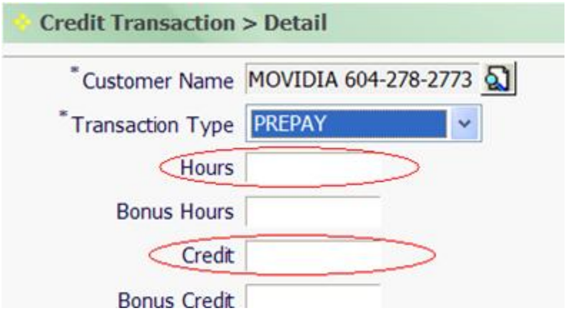
- Repeat to add another item.
- Once all items are added to the Sales List, click the **Make Payment** button to proceed to check out.
  *(Note: To start a new Sales List, click **Clear**)*
- A message will be displayed to confirm the procedure. Click **OK**.
- Select the **Payment Method**.
- Enter the amount paid by typing into the **Pay Amount** field.
- Click on the **Change Amount** text box (Change will automatically be calculated).
- Leave a **Comment**.
- **Submit** payment. If the payment needs to be split, see "How to Make a Split payment".
- A receipt will be displayed. **Close the window** OR **Print** (To print, see "How to Print a Receipt").

How to Make a Group Lesson Payment

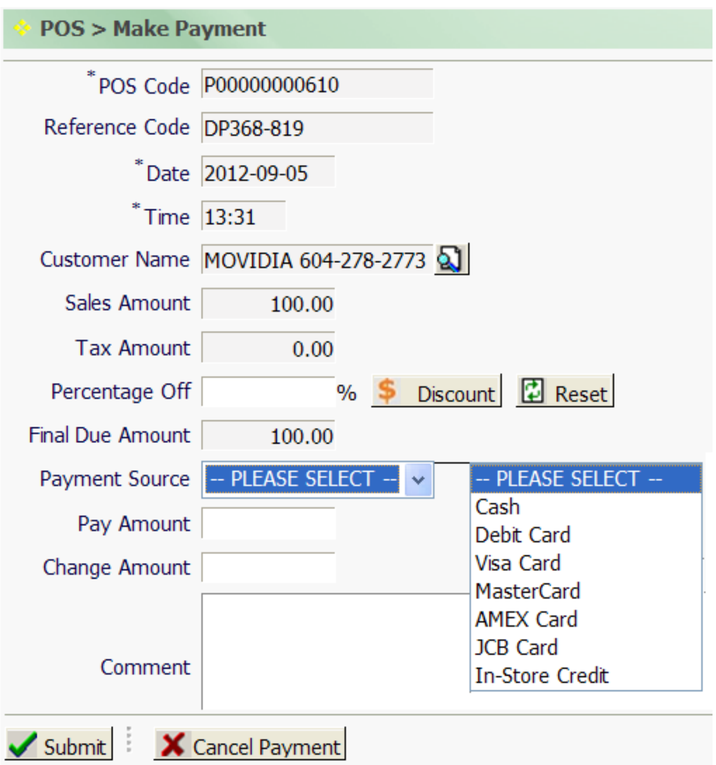
- Select "Booking (B)" from the top menu, and click **Group Lesson**.
- Select the Group Lesson by clicking a **Lesson Code**.
- Scroll down. Under "Students for this Lesson" select the **Customer** (student) **Name**.
- Click the **Make Payment** button.
- A message will be displayed to confirm the procedure. Click **OK**.
- A "POS > Make Payment" page will be displayed *(Note: If a group lesson has already been paid for, the system will notify users that the transaction "has been paid off". In that case, a "POS > Make Payment" page will not be displayed).*
- Select the **Payment Method**.
- Enter the amount paid by selecting or typing into the **Pay Amount** field.
- Click on the **Change Amount** text box. (Change will automatically be calculated).
- Leave a **Comment** if required.
- **Submit** payment. If the payment needs to be split, see "How to Make a Split payment" below.
- A receipt will be displayed. **Close the window** OR **Print** (To print, see "How to Print a Receipt").

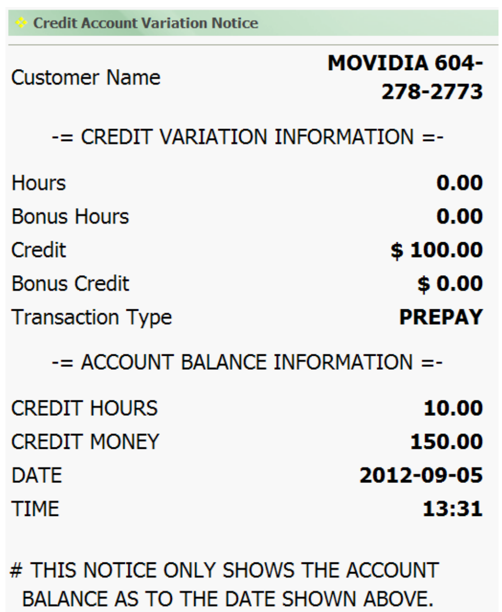
How to Make a Pre-payment

- Select "Management (M)" from the top menu, and click **Customers**.
- Select or search for the **Customer Name.**
- Click **Edit In-Store Credit**.
- Select "PREPAY" from the drop down menu for the **Transaction Type**.
- In the **Credit** or **Hours** field box, type in the amount (of credit/hours) to be prepaid.



- Users will be directed to make a payment. Select the **Payment Method**.
- Enter the amount paid by selecting or typing into the **Pay Amount** field.
- Click on the **Change Amount** text box (Change will automatically be calculated).
- Leave a **Comment**.
- **Submit** payment. If the payment needs to be split, see "How to Make a Split payment".
- A receipt ("Credit Account Variation Notice") will be displayed. **Close the window** OR **Print** (To print, see "How to Print a Receipt").

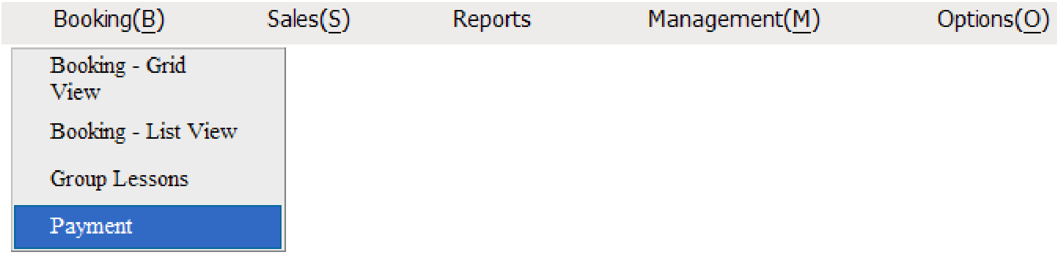




How to Make a Batch Payment

Court Rentals and Private Lessons can be paid by a Batch Payment

- Select "Booking (B)" from the top menu, and click **Payment**.



- Click to search for a **Customer Name**.
- Select the customer and click **Submit**. A "Payment Record" page will be displayed.
- Unpaid items can be viewed from the "Status" column. Select the unpaid item(s).

Business Operation > Payment Record

Customer Name MOVIDIA 604-278-2773 THE TOTAL UNPAID AMOUNT FOR CUSTOMER [MOVIDIA 604-278-2773] IS **$115.50**

	☐	Reference Code	Customer Name	Date	Sale Amount	Tax Amount	Payment Amount	Payment Method	Invoice No.	Status
1	☐	BKN000000779	MOVIDIA 604-278-2773	2012-09-06	18.00	0.90	18.90	Debit Card	V00000002332	PAID via POS
2	☐	BKN000000780	MOVIDIA 604-278-2773	2012-09-06	18.00	0.90	18.90	VISA Card	V00000002333	PAID via POS
3	☑	BKN000000781	MOVIDIA 604-278-2773	2012-09-05	18.00	0.90	18.90			UNPAID
4	☑	BKP000000395	MOVIDIA 604-278-2773	2012-09-05	92.00	4.60	96.60			UNPAID

- Click **Batch Payment**.
- Select a **Payment Source**.
- Type in the **Pay Amount**.
- **Submit**. A receipt will be displayed. **Close the window** OR **Print** (To print, see "How to Print a Receipt").

How to Make a Split Payment

- Once the first form of payment has been submitted. A message will be displayed to confirm a split payment. Click **OK**.
- Repeat the payment procedures by selecting another **Payment Method**.
- Enter the amount paid by typing into the **Pay Amount** field.
- Click on the **Change Amount** text box
- Leave a **Comment**
- **Submit** payment.
- A receipt will be displayed. **Close the window** OR **Print.**

How to Print a Receipt

- After a Payment submission, users are directed to a "Booking > Voucher" page.
- Press **Ctrl** + **P** on the keyboard.
- Select the **Printer** (or cutter).
- Click **Print**.

If the Receipt is not printed correctly, adjust the page margins

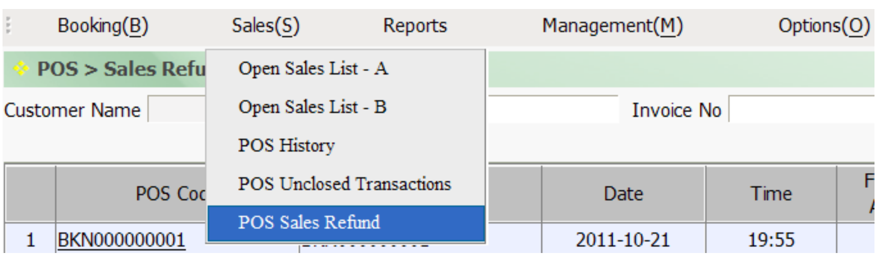
- Open Internet Explorer
- In the toolbar near the top right hand side of the browser, click the small image of a printer.
- Select **Page Setup**. (If users are currently using an older version of IE, Page Setup can be found under “File”).
- The default margins for IE are all 0.75. **Adjust**.
- Click **OK**.

REFUND

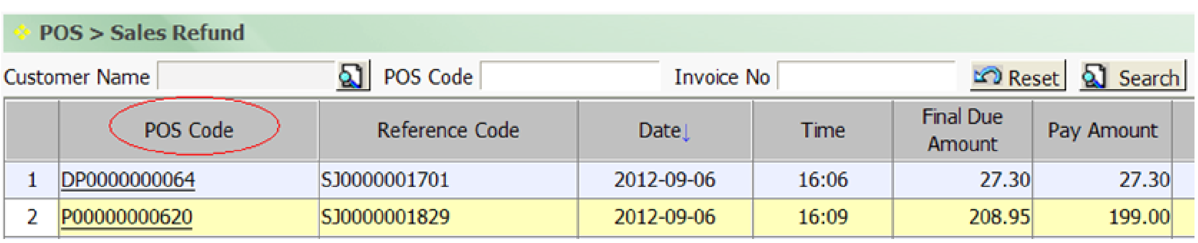
Refunds are automatically given to Customer’s in the form of *Credit* when a Group Lesson, Private Lesson or Court Rental is cancelled. Inventory Sale items are also refunded as customer credit. Customer credits are refunded in the form of an original payment by users through Customer Accounts.

How to Make a Sales Refund

- Select “Sales (S)” from the top menu, and click **POS History**.

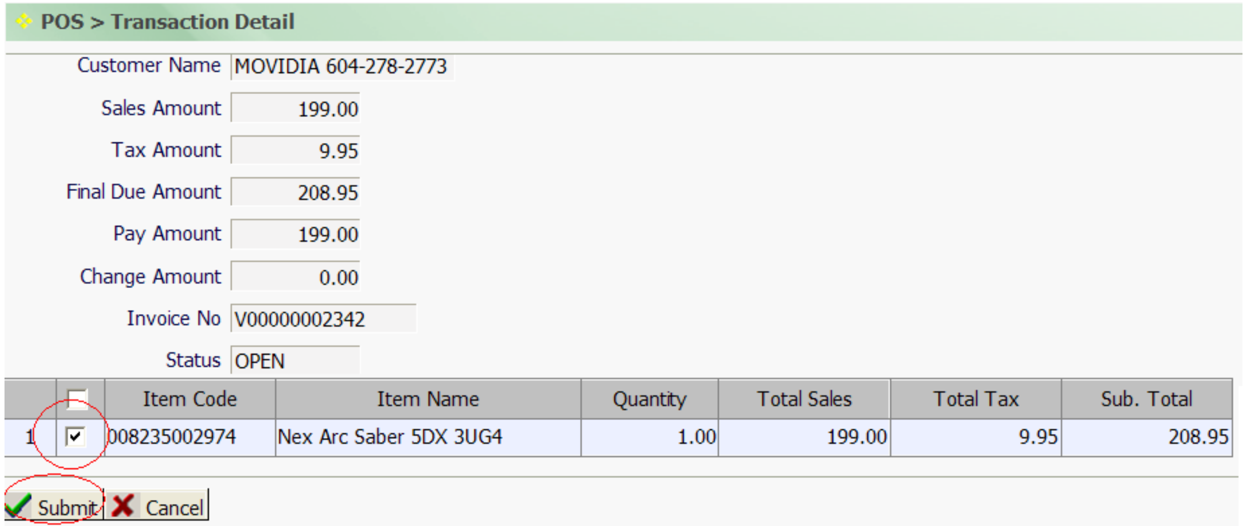


- Locate the Item. Browse Transaction History OR Search by typing the **Invoice No**, **Customer Name**, or **POS Code**. Click on the item **POS Code**



(*IMPORTANT:* Only Inventory Items (i.e. Reference Code “SJ”) can be refunded through POS Sales Refund).

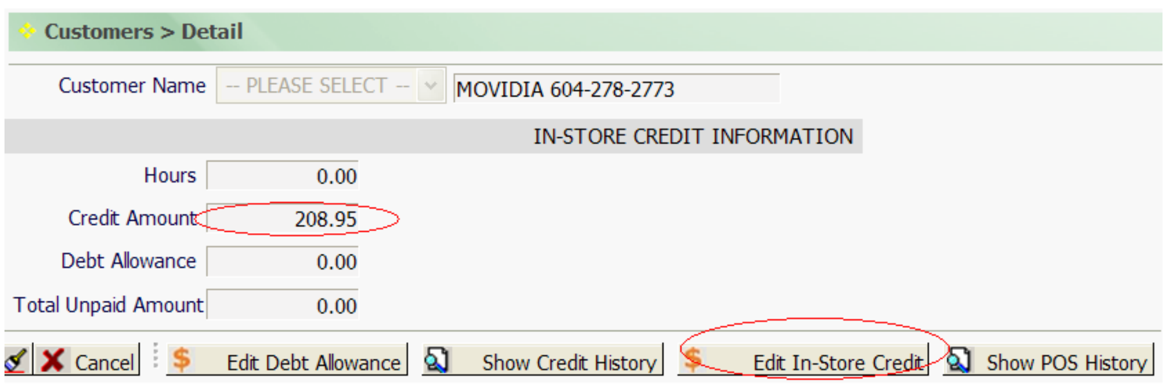
- A “POS > Transaction Detail” page will be displayed. Select the Item(s) to refund and **Submit**.



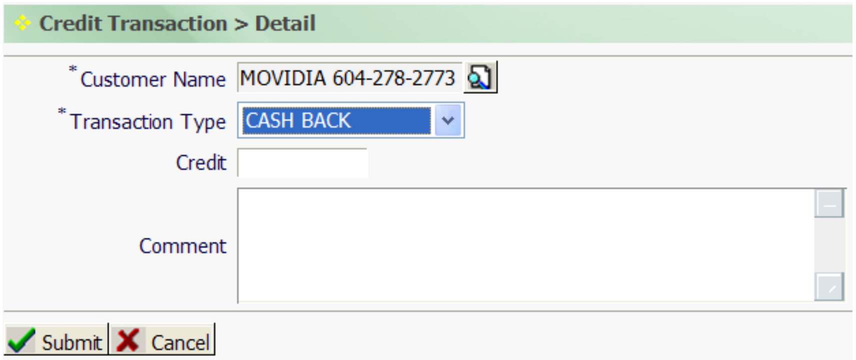
- The Refund will automatically be credited back to the Customer's account in the form of in-store Credit. See "How to Refund Customer Credit to an Original Payment" below.
- **Close** or **Print** Refund Credit Receipt.

How to Refund Customer Credit to an Original Payment

- **Cancel** the booking - Court Rental, Private Lesson, or Group Lesson. (A refund will automatically be given to Customers in the form of credit).
    - OR **Refund** the Sales Item (SJ) (See above)
- Go into the Customer Account by selecting "Management (M)" from the top menu, and by clicking **Customers**.
- Select the **Customer Name** or **Search** by clicking . A "Customers > Detail" page will be displayed and the Credit Amount will have been updated.
- Click **Edit In-Store Credit**.

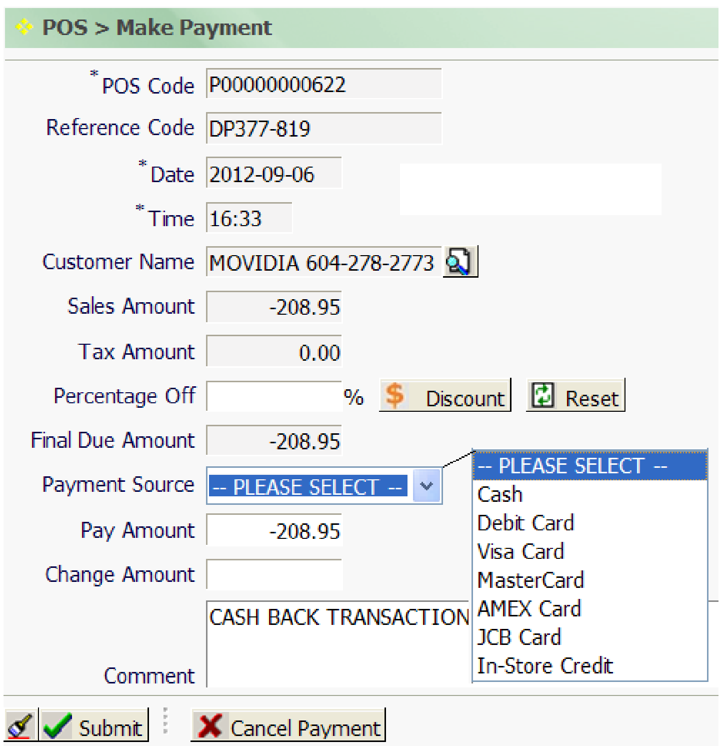


- Select "CASHBACK" for **Transaction Type**.
- In the **Credit** field box, type in the amount (of credit) to refund.
- **Submit**.



A “POS > Make Payment” page will be displayed.

- Indicate the **Payment Source** to refund to.
- **Submit**. A receipt for the refund will be displayed. **Close the window** OR **Print** (To print, see “How to Print a Receipt”).

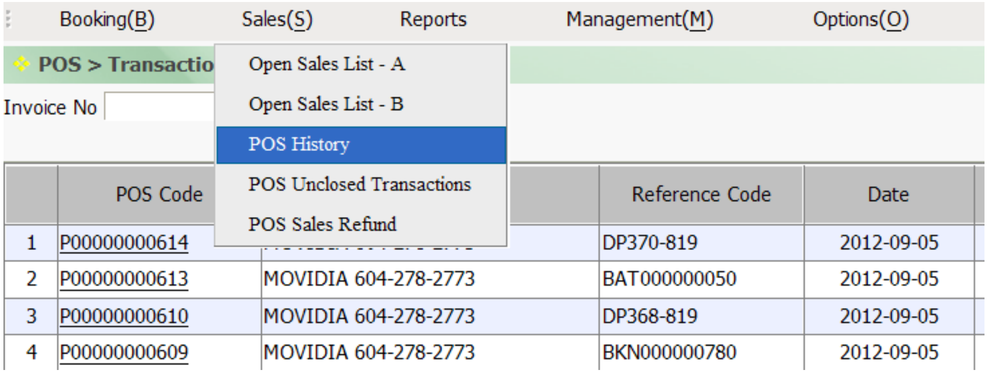


POINT OF SALE (POS) TRANSACTIONS

How to View All POS Transactions

- Select “Sales (S)” from the top menu, and click **POS History** *(Note: The POS History is restricted, and is not available for all users)*.

  A “POS > Transaction History” page will be displayed.

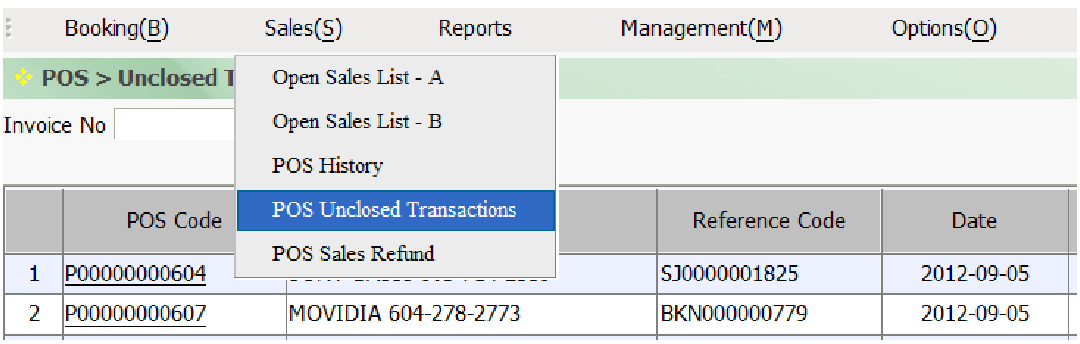


- Browse Transaction History using the navigation bar OR search by typing the **Invoice No**.

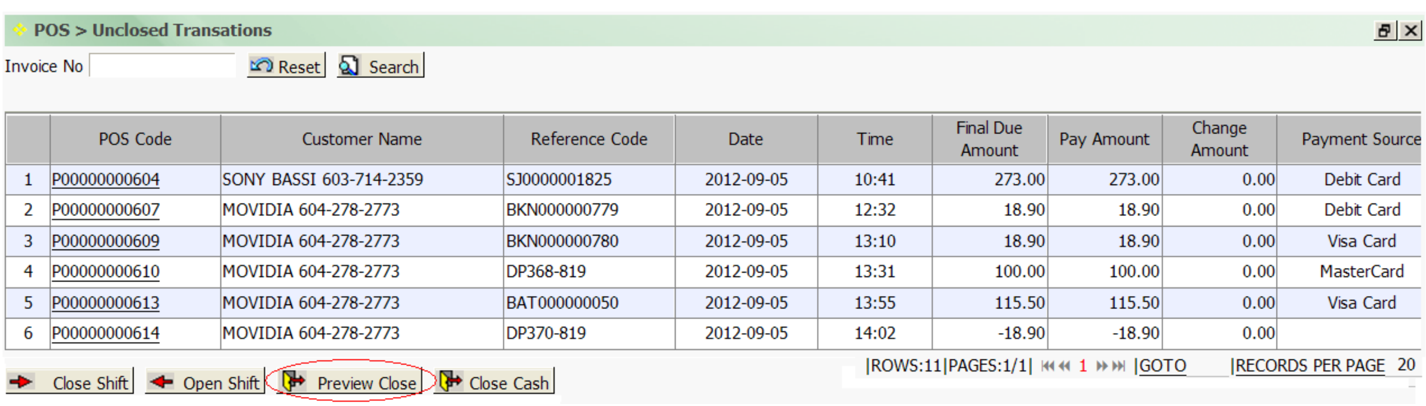
The “POS > Transaction History” page contains *all* information regarding payments and refunds. It includes transactions of all payment sources (closed or open) as well as details regarding every transaction (*i.e.* Customer, Date, Time, Status, Comment, Invoice/Reference No. etc).

How to View Unclosed Transactions

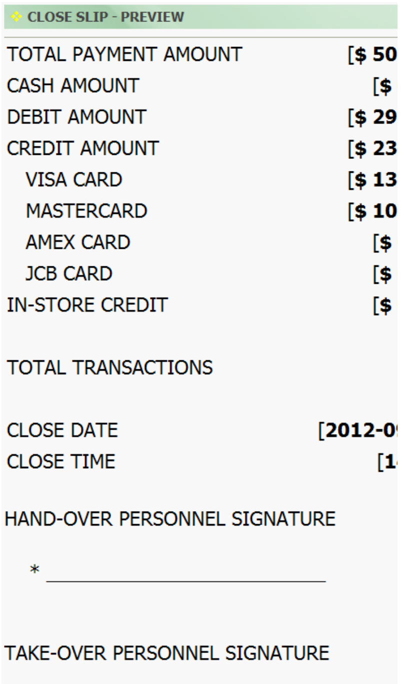
- Select “Sales (S)” from the top menu, and click **POS Unclosed Transactions**



- A “POS > Unclosed Transactions” page will be displayed, containing information regarding all unclosed transactions.



	POS Code	Customer Name	Reference Code	Date	Time	Final Due Amount	Pay Amount	Change Amount	Payment Source
1	P00000000604	SONY BASSI 603-714-2359	SJ0000001825	2012-09-05	10:41	273.00	273.00	0.00	Debit Card
2	P00000000607	MOVIDIA 604-278-2773	BKN000000779	2012-09-05	12:32	18.90	18.90	0.00	Debit Card
3	P00000000609	MOVIDIA 604-278-2773	BKN000000780	2012-09-05	13:10	18.90	18.90	0.00	Visa Card
4	P00000000610	MOVIDIA 604-278-2773	DP368-819	2012-09-05	13:31	100.00	100.00	0.00	MasterCard
5	P00000000613	MOVIDIA 604-278-2773	BAT000000050	2012-09-05	13:55	115.50	115.50	0.00	Visa Card
6	P00000000614	MOVIDIA 604-278-2773	DP370-819	2012-09-05	14:02	-18.90	-18.90	0.00	



- Click **Preview Close**.
  A "Close Slip – Preview" page will be displayed, showing a summary of all unclosed transactions.
- Check the transaction values (Total Payment Amount, Cash/ Debit/ Credit (Visa, Mastercard, Amex, JBC) Amount, and In-store Credit) prior to closing. See "How to Close POS Transactions" below.

How to Switch Shifts

- Users can switch shifts by closing POS transactions, and by using "Close Shift" and "Open Shift".

How to Close POS Transactions

- Select "Sales (S)" from the top menu, and click **POS Unclosed Transactions**.
- Click **Close Cash** *(Note: Once the POS transaction is closed, the action can no longer be withdrawn. It is important for users to preview transactions prior to closing)*
- A message will be displayed to confirm action. Click **OK**.
- **Print** Close Slip.

(IMPORTANT: If a transaction is made after POS is closed, users must click "Close Shift" upon completion of the transaction. By using "Close Shift", the new transaction can be placed into a pool, and included into the next shift. See "How to Close a Shift" below)

How to Close a Shift

- Select "Sales (S)" from the top menu, and click **POS Unclosed Transactions**.
- Click **Close Shift**. *(Note: The "Close Shift" action button is available only when new transactions are made after POS is closed)*
- A message will be displayed for users to confirm to have all unclosed transactions transferred to the next shift. Click **OK**.

How to Open a Shift

- Select “Sales (S)” from the top menu, and click **POS Unclosed Transactions**.
- Click **Open Shift**. *(Note: New shift may contain unclosed transactions from the previous shift)*

REPORTS

How to View Payroll Reports

- Select “Reports (R)” from the top menu, and click **Payroll Report**.

How to View Sales Reports

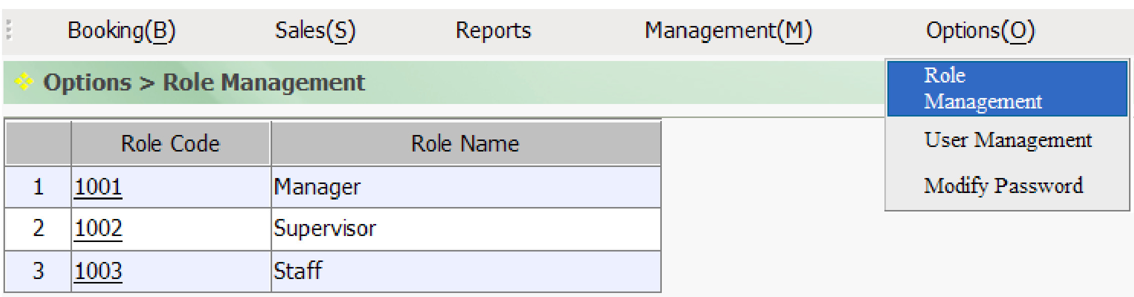
- Select “Reports (R)” from the top menu, and click **Sales Report – Brief**.

(NOTE: An Operational Data Storage (ODS) system is in the process of being implemented)

OPTIONS

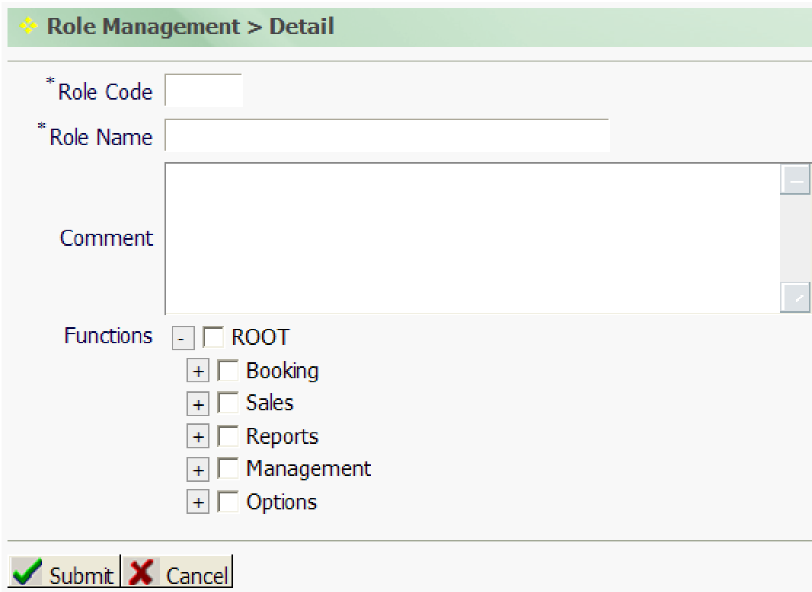
How to Add/Remove a Management Role

- Select “Options (O)” from the top menu, and click **Role Management**.



To Add a Role

- Open the “Role Management > Detail” page by clicking .
- Enter a **Role Code** and **Role Name**
- Add a **Comment**.
- Select the **Function(s)** available to the user Role (Booking, Sales, Reports, Management, Options).
- **Submit**.



*Indicates required field

To Remove an Existing Role

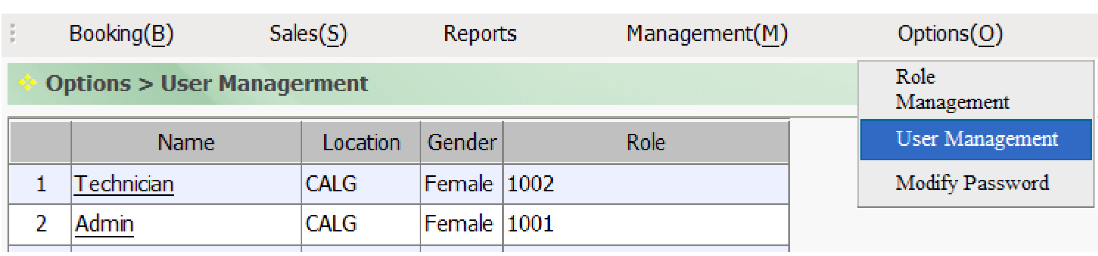
- Select a Role from the table, and click .
- Click **OK** to confirm.

How to Edit a Management Role

- Select "Options (O)" from the top menu, and click **Role Management**.
- Select a **Role** from the table, and click .
- Make changes to the **Role Name**, **Comment**, and/or the **Functions** available for the Role.
- And **Submit**.

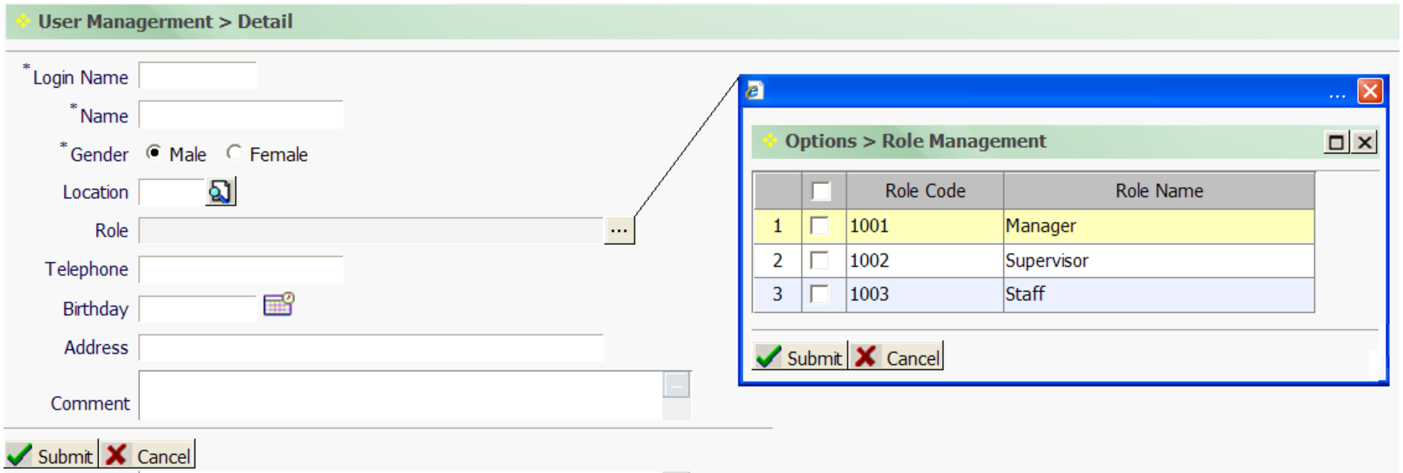
How to Add a User

- Select "Options (O)" from the top menu, and click **User Management**.



- Open the "User Management > Detail" page by clicking .
- Enter a **Login Name**.
- Enter a **User Name**.
- Indicate **Gender** by selecting "Male" or "Female"
- Enter User **Location** by clicking .

- Choose the **Management Role**. Click ···, select the **Role**, and **Submit.**
- Enter user contact **Telephone**.
- Enter a **Birthday** by clicking .
- Type in user **Address** and a **Comment**.
- **Submit.**



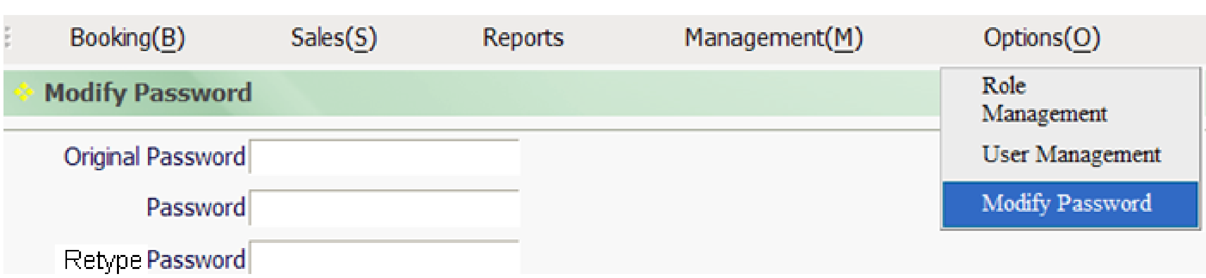
*Indicates required field

How to Edit a User

- Select "Options (O)" from the top menu, and click **User Management**.
- Click on a **Username**.
- This will open the "User Management > Detail" page. Click .
- Make changes to the **User Name**, **Gender**, **Location**, **Role**, **Telephone**, **Birthday**, **Address**, and/or **Comment**.
- **Submit**.

How to Change a User Password

- **Login** to the User Account.
- Select "Options (O)" from the top menu, and click **Modify Password**.
- Type in the **Original Password**.
- Type in a (new) **Password**.
- **Retype** the new password. And **Submit**.



COLOR CODE KEY FOR GRID VIEW

Font Colors

- Unpaid – Pink
- Paid – Black
- Paid by Hour – Blue

Background Colors

- Reserved – Light Pink (Represents courts *booked* for rentals)
- Ongoing – Green (Represents court rentals (or drop-ins) *in session*)
- Finished – Grey (Represents court rentals that have *ended*)
- Missed – Yellow (Represents *no-shows* (*e.g.* failure to check-in or cancel)
- Cancelled – Red (Represents group lesson or court rental *cancellations*)
- Private Lesson – Pale Yellow (Represents courts *booked* for private lessons)
- Group Lesson – Light Green (Represents courts *booked* for group lessons)

(Note: Colors indicated above are not fixed and may be configured to suit user preferences. To modify these configurations, contact Movidia System Providers)