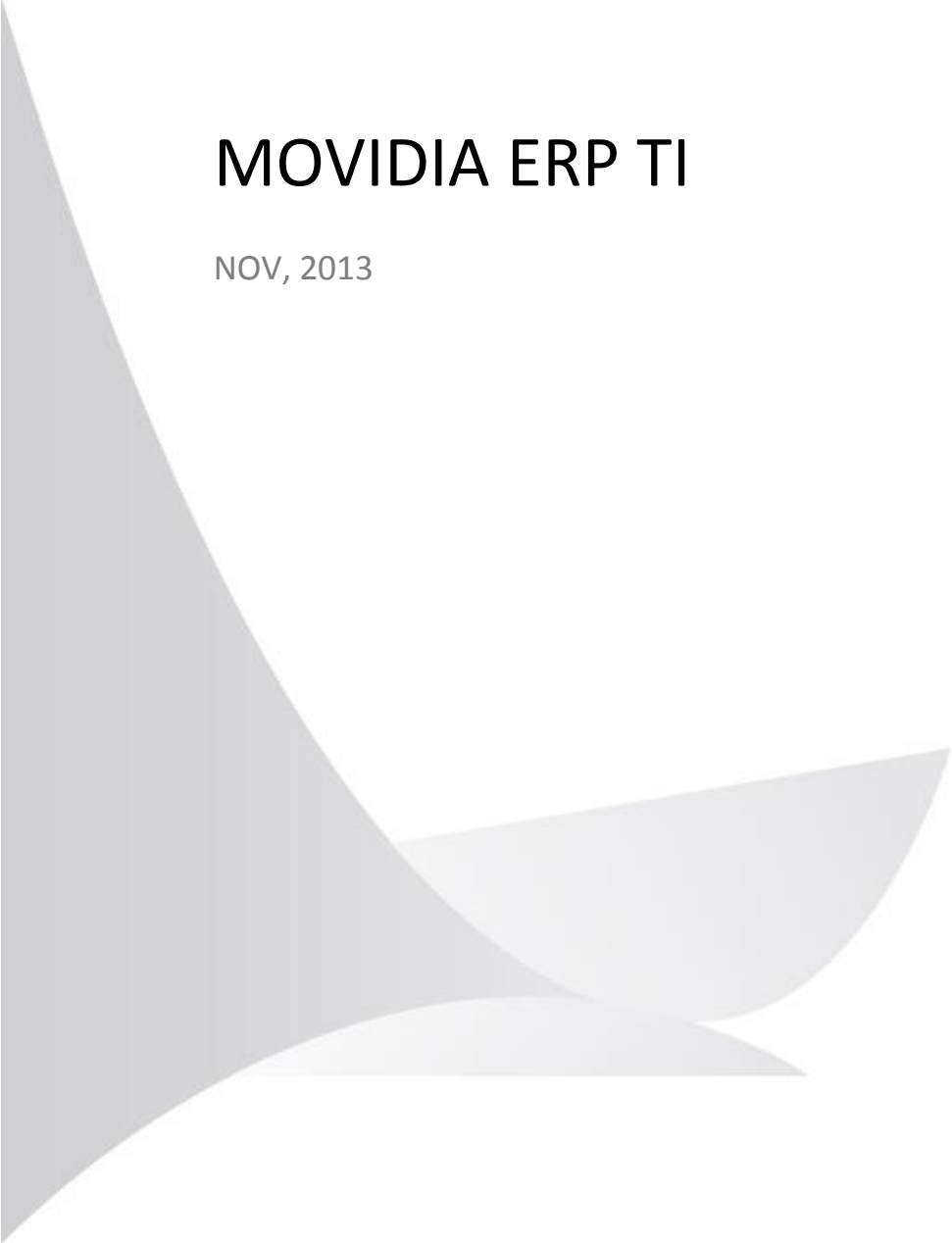




MOVIDIA ERP TI

NOV, 2013

QUICK REFERENCE GUIDE

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AN INTRODUCTION TO MOVIDIA ERP TI

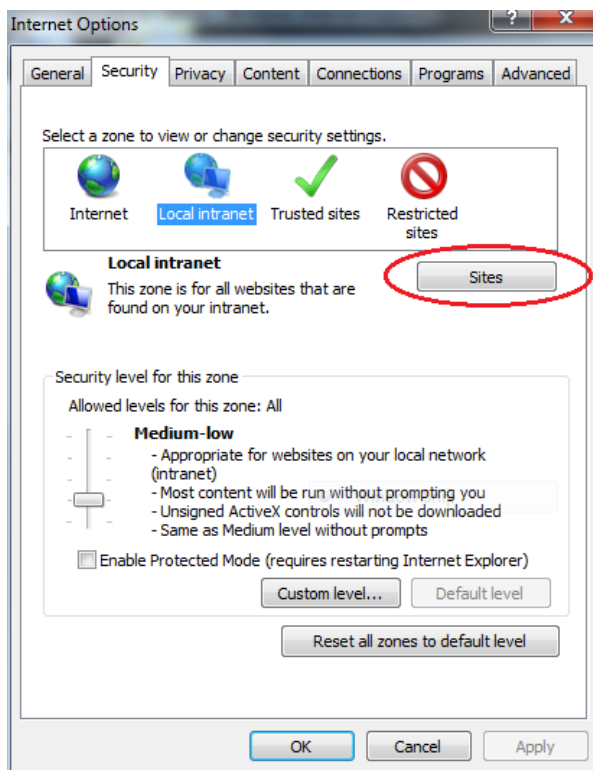
Movidia ERP TI is a web-based management system designed mainly for use by general tutoring facilities and learning centers. The system includes features for Scheduling, Sales, Inventory Management, Student and Staff Management, E-mail Invoicing, and Reporting. Providing quick and easy information processing, the Movidia ERP TI system helps businesses to record and track facility activities at single locations, or across multiple locations in real time.

GETTING STARTED

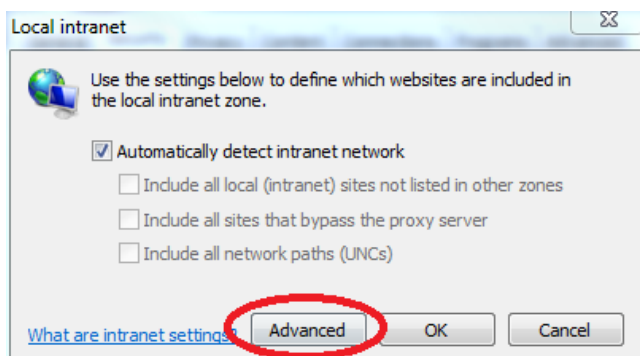
- Authorized customers who have a current support agreement with Movidia Intelligence are given an Internet Explorer (IE) address with a valid user name and password.

How to access MOVIDIA ERP TI

- Open Internet Explorer
- Navigate to the webpage by typing in the provided Uniform Resource Locator (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 ERP TI

Upon logging into the system, users are directed to the console page. Here, users can access module features from the Top Menu Bar.

Business(<u>B</u>)	Sales(<u>S</u>)	Reports	Management(<u>M</u>)	Options(<u>O</u>)
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Business Menu

DROP DOWN ITEM	MAJOR FEATURE(S)
Booking - Grid View	• View single day facility activities • Schedule Diagnostic Assessments • Reserve room for Drop-ins • Reserve room for future Private Session scheduling • Add an additional room to a Group Session
Booking - List View	• Search function to view past, current, and future bookings
Group Sessions	• Schedule Group Sessions • Search function to locate Group Sessions by Student

	Name
Private Sessions	• Schedule Private Sessions • Search function to locate Private Sessions by Tutor Name or Session Name
Tutor Schedule	• Print or view Tutor schedules
Daily Student Schedule	• Print Daily Student Attendance Sheet
Assessment Record	• Record Tutor Payroll for student assessments
Tutor Grid View	• View Tutor Availability

Sales Menu

DROP DOWN ITEM	MAJOR FEATURE(S)
Sales List - A	• Perform sales transactions
Sales List - B	• Perform sales transactions
POS History	• View all Point of Sales transaction history
POS Unclosed Transactions	• View user unclosed transaction history • Close transactions to end shift • Open new shift
POS Sales Refund	• Perform sales refunds • Search function to locate all sold items

Reports Menu

DROP DOWN ITEM	MAJOR FEATURE(S)
Payroll Report	• Generate Tutor Payroll Reports
Sales Report	• Generate detailed daily or monthly Sales Reports • Generate large category (summary) daily or monthly Sales Reports

Student Registration History	• View and print registration history for each student
Student Purchase History	• View and print inventory sales history for each student
Inventory Storage Report	• Generate a storage count report on inventory items by Category
Outstanding Balance Report	• Generate total or up-to-date outstanding balance reports for each student.

Management Menu

DROP DOWN ITEM	MAJOR FEATURE(S)
Students	• Create facility student database • Manage and view in-store credit account • Perform system Cash-backs • Send e-invoices through email
Locations	• Manage single or multiple location information and settings
Staff	• Create facility staff database • Add Staff Blocks (unavailability) shown on Tutor Grid View
Inventory	• Input Inventory sales items • Input storage control information
Private Tutoring Rates	• Define Private Tutoring Rates for customers based on Tutor
Tutor Payroll Rates	• Define Tutor Payroll Rates for Private and Group sessions

Options Menu

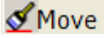
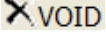
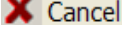
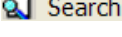
DROP DOWN ITEM	MAJOR FEATURE(S)
----------------	------------------

Role Management	Specify access control
User Management	Create new user logins
Change Password	Modify current user password

NAVIGATING MOVIDIA ERP TI

Standard Buttons

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

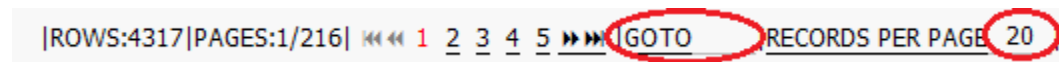
BUTTON	ACTION
	Create or Add a new item
	Delete current item
	Edit an existing item
	Display reference selector
	Display calendar menu bar
	Navigate to first page
	Navigate to previous page
	Navigate to next page
	Navigate to last page
	Move an item
	Void an item
	Go back
	Display a search field

 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
 Preview Invoice	Preview electronic invoice before sending email

Viewing Data

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

Users can locate a page by typing in a page number next to “GO TO” at the bottom right-hand corner of the screen.



Data are configured to display 20 records per page. Display more records by clicking on the current number of records (i.e. 20), and typing in the new number of records to have displayed.

MOVIDIA ERP TI SYSTEM SET UP

Users are required to set up the following **Primary Items** before use:

- Business Location information
- Staff Database
- Private Tutoring Rates for facility Tutors
- Tutor Payroll Rates
- Student Database (See section “Student Management”)
- Inventory (See section “Inventory Management”)

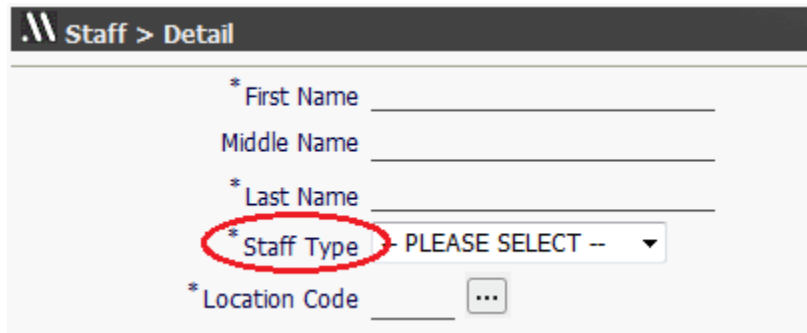
Primary items are accessed through the **Management tab** from the Top Menu.

How to Add a Location

- Select “Management (M)” from the top menu, and click **Locations**.
- Click . This will display a page for users to enter Location details.
- Input the required field information.
 - The **Location Code** must be 4 characters in length.
 - **Availability** indicates when a Location is available for contact.
 - The **Number of Rooms** indicate the number of columns that will be shown on the Booking Grid View.
- Click **Submit**.
- Repeat to add another Location.

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.
- Input the required field information.



The screenshot shows a web form titled "Staff > Detail". It contains several input fields: "First Name", "Middle Name", "Last Name", "Staff Type", and "Location Code". The "Staff Type" field is a dropdown menu currently showing "PLEASE SELECT --" and is circled in red. The "Location Code" field has a small "..." button next to it.

- When selecting a **Staff Type**, note that some features in the system are made restricted or unavailable for specific Staff Types (See “How to Configure Access Control” to change or add Staff Type restrictions).
- Click **Submit**.
- Repeat to add another Staff Member.

How to Add Private Tutoring Rates

Once Tutors are added as Staff, facility Private Lesson Rates can be entered into the system for each Tutor. These rates are used to calculate payment amounts when processing student payment through POS.

- Select “Management (M)” from the top menu, and click **Private Tutoring Rates**.
- Click .
- Identify the **Tutor Name** by selecting the reference selector . **Submit**.
- Input the required field information.

* Tutor Name

* Session Type **PRIVATE SESSIONS**

* Hours **1 HOUR**

* Number of Students **1 Student**

Location Code

Rate

- The **Rate** is representative of the due amount calculated per time as defined in the “Hours” field.
- The Tutor and Session Rate combination must be defined in order for Private Tutoring sessions to be scheduled.
- **Submit.**
- Repeat to add another Private Tutoring Rate (*Note: Group Session Rates are indicated when a Group Session is scheduled (See section “Scheduling” for more information).*)

How to Add Tutor Payroll Rates

Tutor Payroll Rates (for both Group and Private Tutoring) must be defined in order for Payroll Reports to be generated.

- Select “Management (M)” from the top menu, and click **Tutor Payroll Rates**.
- Click .
- Enter the required field information for Private Lesson or Group Lesson.
 - For Private Session Payroll Rates, the number of hours/students must be defined. Do NOT select the “NOT CONCERNED OPTION”.

Tutor Payroll Rate > Detail

* Tutor Name

* Session Type **PRIVATE SESSIONS**

* Hours **NOT CONCERNED**

* Number of Students **NOT CONCERNED**

Location Code

Rate

- For Group Session Payroll Rates, calculation is on a *per hour* basis.
- **Submit.**
- Repeat to add another Payroll Rate.

How to Edit a Location

- Select “Management (M)” from the top menu, and click **Locations**.
- Select the business Location. A “Locations > Detail” page will be displayed.
- Select Edit .
- Make changes.
- **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.
- Select Edit .
- Make Changes.
- **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.
- Select Edit .



The screenshot shows a form with three input fields: SIN, Birth Date, and Status. The Status field is a dropdown menu currently set to 'ACTIVE'. A red circle highlights the Status dropdown. Below the form is a toolbar with three icons: a pencil icon (disabled), a red X icon (disabled), and a 'Cancel' button.

- From **Status**, select “INACTIVE” from the drop down menu. **Submit.**

OR

- Click . The Staff Status will automatically be updated to “INACTIVE”.

How to Edit Private Lesson Rates

- Select “Management (M)” from the top menu, and click **Lesson Rates**.
- Click on the **Tutor Name**.
- Click .
- Make changes.
- **Submit**.

How to Edit Tutor Payroll Rates

- Select “Management (M)” from the top menu, and click **Payroll Rates**.
- Locate the Tutor using the reference selector .
- Click .
- Make changes.
 - Note that Payroll Reports are generated in real time. Once Rates are changed, historic payroll reports will update to show calculations using the new rate.
- **Submit**.

INVENTORY MANAGEMENT

The Inventory is composed of a list of sales items in which users can control, sell and examine visually. All business sales items are managed by users, and can contain non-countable (*i.e.* term fees, drop-in fee) or countable inventory (*i.e.* workbooks).

Business(B)Sales(S)Reports(R)Management(M)Options(O)

Business Management > Inventory

Item CodeItem Name

StudentsLocationsStaff

Inventory

Private Tutoring RatesTutor Payroll Rates

CategoryPriceSales Tax Type

1	000772100830	MELISSA AND DOUG LETTER PUZZLE	MISCELLANEOUS	16.99	GST only
2	000772104241	MELISSA AND DOUG ALPHABET PUZZLE	SUPPLIES	16.99	GST only
3	000772203395	MELISSA AND DOUG NUMBER PUZZLE	MISCELLANEOUS	18.99	GST only
4	008421390014	BEANIE PUZZLE ERASER	SCHOOL SUPPLIES	2.00	GST only
5	023472002464	PARAGRAPH WRITING	WORK BOOKS	17.99	GST only
6	023472007513	DAILY MATH GR2	WORK BOOKS	21.99	GST only
7	023472007902	DAILY TRADITIONAL MANUSCRIPT	WORK BOOKS	18.99	GST only

*Sales items listed above are only samples. The Category fields are configured during the initial set up process.

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.
- Enter the required field information.

 **Inventory > Detail**

* Item Code _____

* Item Name _____

* Category - Please select -

Sub Category _____

* Storage Ctrl YES

Price _____

Sales Tax Type -- PLEASE SELECT --

- If inventory items contain product barcodes, input or scan the barcode into the **Item Code** field.
- Note that **Item Codes** cannot be altered after submission. Ensure that the item code is correct before submitting.

- For additional **Category** selections, users can contact Movidia system providers.
- Indicate **Storage Ctrl** (control).
 - Select “YES” for items that are maintained on stock records (countable items).
 - Select “NO” for items that are not maintained on stock records (non-countable items).
- Enter an item **Price**.
- Indicate the applicable **Tax Type**.
- Submit.
- Once the item is added, users are required to enter Detailed Inventory Control Information for countable items.

Inventory > Detail

* Item Code

* Item Name

* Category

Sub Category

* Storage Ctrl

Price

Sales Tax Type

INVENTORY STORAGE INFORMATION				
Item Code	Location Code	Shelf No.	Unit No.	Quantity
no data				

- Insert the quantity of an item by clicking **Append Quantity**.

http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameS

Inventory Control > Detail

* Item Code

* Location Code

Quantity

Internet | Protected Mode: On

- Indicate the **Location**.
- Type in the current **Quantity** of the item.
- **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.
- **Submit** to save changes.

How to Update Inventory Records

Products added to an Inventory or lost from an Inventory need to be manually updated by users. Inventory items that are sold to customers are automatically reduced from stock records, and inventory items that are refunded are automatically added back to 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 or scanning the barcode into the Item Code field.
- Select the item.

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 Item History

In the Inventory Item History, users can view purchasing, lost, and sales transaction details for a specific inventory item.

- 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**.

STUDENT MANAGEMENT

To record all student activities, users must first create a Student Database prior to scheduling assessments, performing sales, or enrolling students to Group or Private Sessions.

Business(B)		Sales(S)		Reports		Management(M)		Options(Q)						
Business Management > Students						Students								
Student Name						Locations								
						Staff								
Student Name						Inventory		Address		Postal Code	Mobile Phone	Home Phone	Emergency Contact	Emergency Phone
1	TEST ACCOUNT 604-278-2773				Kind			2560 SHELL RD., RICHMOND		V6X 0P1	123-123-1234	604-278-2773	GUARDIAN NAME	604-123-1234
2	HERMAN TEST 604-271-0658				Grad			-2233 NO.3 RD., RICHMOND		V6X 1E3	604-222-2222	604-271-0658	HELEN SU	604-111-1111

How to Add a Student Profile

- Select “Management (M)” from the top menu, and click **Students**.
- Click .
- Enter the required field information.
 - Input the email address in which customers wish to receive electronic invoices to in the **Email 1** field.
- **Submit**.

How to Edit Student Information

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

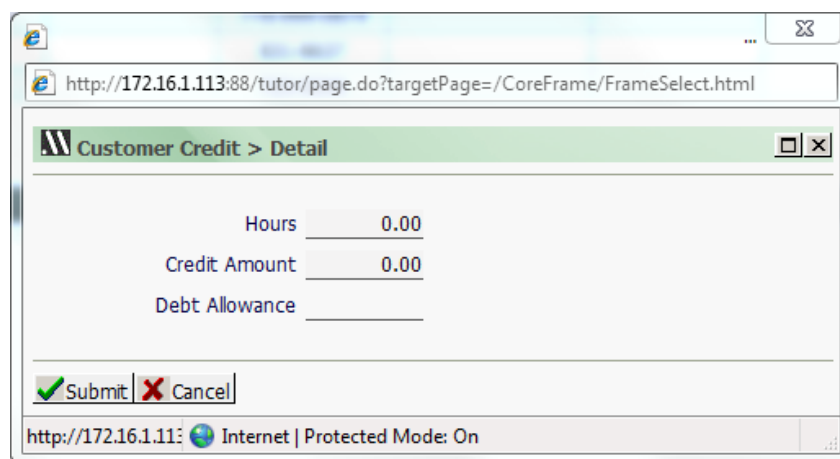
How to Manage Student Debt Allowance

- Select “Management (M)” from the top menu, and click **Students**.
- Select a **Student Name**.
- Scroll down to “In-store Credit Information”.

IN-STORE CREDIT INFORMATION	
Hours	0.00
Credit Amount	0.00
Debt Allowance	0.00
Total Unpaid Amount	0.00 Show Details

  Cancel |  Edit Debt Allowance |  Show Credit History |  Manage Instore Credit |  Show POS History

- To add a Debt Allowance, or make changes to an existing Debt Allowance, click **Edit Debt Allowance**.



The screenshot shows a web browser window with the address bar displaying `http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html`. The main content area is titled "Customer Credit > Detail" and contains a form with the following fields:

Hours	0.00
Credit Amount	0.00
Debt Allowance	

At the bottom of the form, there are two buttons: a green checkmark icon followed by "Submit" and a red X icon followed by "Cancel". The browser's status bar at the bottom shows `http://172.16.1.113:88 Internet | Protected Mode: On`.

- Type in the **Debt Allowance** amount.
- **Submit**.

How to Manage Student Credit Accounts

- Select “Management (M)” from the top menu, and click **Students**.
- Select a **Student Name**. Scroll down.
- Under “In-store Credit Information”, click **Manage In-Store Credit**.

IN-STORE CREDIT INFORMATION	
Hours	0.00
Credit Amount	0.00
Debt Allowance	0.00
Total Unpaid Amount	0.00

[Show Details](#)

[Cancel](#) [Edit Debt Allowance](#) [Show Credit History](#) [Manage Instore Credit](#) [Show POS History](#)

- Indicate the **Transaction Type**.
 - Select “PREPAY” for in-store credit prepayments.
 - Select “CORRECT +/- ” to make in-store credit adjustments.

Credit Transaction > Detail

* Customer Name TEST ACCOUNT 604-...

Transaction Type -- PLEASE SELECT --

Hours _____

Bonus Hours _____

Credit _____

Bonus Credit _____

Comment

- 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)** to reward.
- 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 detailed instructions.

How to View Student Credit History

- Select “Management (M)” from the top menu, and click **Students**.
- Select a **Student Name**.
- Click **Show Credit History**. A Student Credit History page will be displayed.

How to View Student POS History

- Select “Management (M)” from the top menu, and click **Students**.
- Select a **Student Name**.
- Click **Show POS History**.

In the Student POS Transaction History, users can view all payment and refund data related to the student. From here, electronic invoices can be sent to customers through email. See “How to send electronic invoices” for more information.

SCHEDULING & STUDENT REGISTRATION

How to View Facility Schedule

Facility Grid View & Tutor Grid View

There are two ways to view facility Bookings – **Facility Grid View** & **Tutor Grid View**.

The **Facility Grid View** user interface (UI) allows users to view all facility activities for a single day. The Facility Grid View UI is color-coded based on room status (*i.e.* in-session, missed, completed), and booking type (*i.e.* Assessment, Drop-in, or Group/Private Session). See the “Colour Code Key for Grid View” below for more information.

The **Tutor Grid View** UI allows users to view facility bookings for a single day based on all Tutoring Staff schedules. The Tutor Grid View UI shows Tutor availability and blocks, in addition to teaching schedules.

Colour-code Key for Grid View

In Booking - Grid-View, background cell colors are configured to show room status and booking type. Note that the colors indicated below are not fixed and may be changed to suit user preferences. To modify these configurations, contact Movidia System Providers.

- Reserved Assessments – **Pink** (Represents *scheduled* assessments)
- Private Lesson – **Yellow** (Represents rooms *booked* for private sessions)
- Group Lesson – Sky **Blue** (Represents rooms *booked* for group sessions)
- Reserved Drop-ins - Royal **Blue** (Represents *spaces* for drop-in students)
- In-session – **Green** (Represents *ongoing* sessions)
- Completed – **Grey** (Represents sessions that have *ended*)
- Missed – **Orange** (Represents sessions that have not been “checked-in” (*i.e.* *no-shows* or *cancelled* sessions that do not receive refunds or require tutor payroll calculations))
- Blocked - **Red** (Represents tutor *unavailability* periods)

How to Search Facility Bookings

The **List View** UI allows users to search facility bookings using different search criteria. The List View UI display variable amounts of data and is convenient for browsing all current, future, and previous bookings. Details for each booking can be conveniently viewed by clicking the Reference Codes (*i.e.* PL00000089).

- Select “Business (B)” from the top menu
- Click **Booking - List View** under "Search".

How to View Tutor Availability - Tutor Grid View

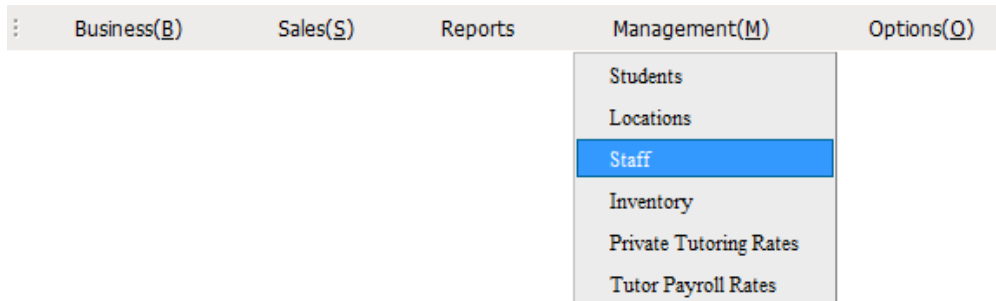
- Select “Business (B)” from the top menu, and click **Tutor Grid View**.

Tutor Grid View							
Date 2013-11-17  							
TIME	JEFFREY CHAN	ELLEN MARR	KYLE YOUNG	TERESA JONES	KELLY PALMER	CHERRY LEE	TIME
08:30 - 09:00	X	X		X		X	08:30 - 09:00
09:00 - 09:30	X	X		X		X	09:00 - 09:30
09:30 - 10:00	X	X		X		X	09:30 - 10:00
10:00 - 10:30		X		X		X	10:00 - 10:30
10:30 - 11:00		X		X		X	10:30 - 11:00
11:00 - 11:30		X		X		X	11:00 - 11:30
11:30 - 12:00		X		X		X	11:30 - 12:00
12:00 - 12:30				X		X	12:00 - 12:30
12:30 - 13:00				X		X	12:30 - 13:00
13:00 - 13:30				X		X	13:00 - 13:30
13:30 - 14:00				X		X	13:30 - 14:00
14:00 - 14:30				X		X	14:00 - 14:30
14:30 - 15:00				X		X	14:30 - 15:00
15:00 - 15:30				X		X	15:00 - 15:30
15:30 - 16:00				X		X	15:30 - 16:00
16:00 - 16:30				X	X		16:00 - 16:30
16:30 - 17:00			X	X	X		16:30 - 17:00
17:00 - 17:30			X	X	X		17:00 - 17:30
17:30 - 18:00			X	X	X		17:30 - 18:00
18:00 - 18:30	X		X	X	X		18:00 - 18:30
18:30 - 19:00	X		X	X	X		18:30 - 19:00
19:00 - 19:30	X		X	X	X		19:00 - 19:30
19:30 - 20:00	X		X	X	X		19:30 - 20:00
20:00 - 20:30	X		X	X	X	X	20:00 - 20:30
TIME	JEFFREY CHAN	ELLEN MARR	KYLE YOUNG	TERESA JONES	KELLY PALMER	CHERRY LEE	TIME

- The Tutor Grid View allows users to check the availability of all Tutoring Staff prior to enrolling facility students.
- To check availability, specify the day using the calendar. Select .
- Click Search to view all tutoring staff.

How to Add a Tutor Block Record

- Select “Management (M)” from the top menu, and click **Staff**.



- Select the **First Name** of the Tutor.
- Click  **Schedule**. A new window will be displayed.
- To add a new block record, click . A Staff Schedule > Unavailability page will be displayed.
- Input the required field information.

A screenshot of a web browser window displaying the 'Staff Schedule > Unavailability' form. The browser's address bar shows the URL 'http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html'. The form has a title bar with a green header containing the text 'Staff Schedule > Unavailability'. The form fields include: '* Start Date' with a calendar icon, '* End Date' with a calendar icon, 'Day of the Week' with a dropdown menu set to 'Monday', '* Block Start Time' with a text input and the note 'in 24H format only', '* Block End Time' with a text input and the note 'in 24H format only', and a 'Comment' field with a large text area. At the bottom of the form are two buttons: a green 'Submit' button and a red 'Cancel' button. The browser's status bar at the bottom shows 'http://172.16.1.113:88 Internet | Protected Mode: On'.

- The **Start Date** and **End Date** specifies the period in which the record is valid for (*i.e.* an entire Term or semester (e.g. January 1 - March 31)).
 - For a quicker method, type in the date (YYYY-MM-DD).
- **Submit.**

- Repeat to add another block record.

How to Schedule a Diagnostic Assessment

To add a Diagnostic Assessment, users must:

- Schedule the Assessment
- Assign the Tutor

Booking > Grid View on 2013-11-11

Location **MAIN** ... Date **2013-11-11** Reset Search

TIME	DESK #1	DESK #2	DESK #3	D
08:30 - 09:00				
09:00 - 09:30				
09:30 - 10:00				
10:00 - 10:30	PL0000000052 STEPHANIE (SUBJECT SUPPORT) KYLE	BKN000000007 DOUG MAK 778-861-6788 Diagnostic Assessment NONE 10:00 - 11:00	GL0000000003 PRE-KINDERGARTEN (3- YRS) JEFFREY	
10:30 - 11:00	10:00 - 11:00	10:00 - 11:00	10:00 - 11:00	
11:00 - 11:30				

Step One: Schedule the Assessment

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Click . This will display a page for users to submit booking details.
- Select “Diagnostic Assessment” for the **Booking Type** from the drop down menu.

Booking > Detail

* Booking Type **Diagnostic Assessment** ▼

Student Name ...

* Recurrence **NONE** ▼

* Date

* Start Time *in 24H format only*

* End Time *in 24H format only*

* Location Code **MAIN** ...

* Room No. ...

Comment

- Choose the **Student Name** by selecting the reference selector .
- If the student has not been added to the database yet, leave the Student field blank and update the information once the student profile has been created.
- Enter the required field information.
 - Select “NONE” Recurrence for one-time assessments.
 - Daily, Weekly, and Bi-weekly recurrences are pre-set configurations. By default, they are set at 7 days, 12 weeks, and 12 months. To changes these settings, users must contact Movidia system providers.
- **Submit.**

IMPORTANT: Once Diagnostic Assessments are made, users must record the Tutor assigned to perform the assessment under “Assessment Record”. See “How to Assign a Tutor to Perform a Diagnostic Assessment” below for more information.

Step Two: Schedule a Tutor to Perform the Assessment



- Select “Business (B)” from the top menu, and click **Assessment Record**.
- Click .
- Choose the **Tutor Name** by selecting the reference selector .
- Enter the required field information.

Assessment Record > Detail

Tutor Name

* Location Code

* Date

* Start Time

* End Time

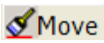
Amount \$

Description

- Use the **Comment** field to specify Assessment Details (*i.e. Student Name, Subject, Grade, etc.*). This field can be updated at any time using the edit function.
- The **Amount \$** field defines the Tutor Payroll for the recorded Assessment to be added to the Tutor Payroll Report.

- **Submit.**

How to Edit a Diagnostic Assessment

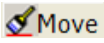
- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Select the Assessment **Reference Code** (*i.e. BKN00000359*). OR click anywhere in the booking cell box (for Grid View only).
- A “Booking > Detail” page will be displayed. Click  Move
- Make changes.
- **Submit.**

How to Add a Drop-in Session Reservation

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Click . This will display a page for users to submit booking details.
- Select “Drop-in Reservation” for the **Booking Type** from the drop down menu.
- Enter the required field information.
 - Select “None” Recurrence for one-time drop in sessions.

- Daily, Weekly, and Monthly recurrences are preset configurations. By default, they are set at 7 days, 12 weeks, and 12 months. To have these settings changes, users must contact Movidia system providers.
- **Submit.**
- Repeat to reserve an additional room for Drop-in.

How to Edit a Drop-in

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Select the drop-in **Reference Code** (*i.e.* DP0000359). OR click anywhere in the drop-in cell box.
- A “Booking > Detail” page will be displayed. Click  **Move**.
- Make changes.
- **Submit.**

How to Add a Group Session

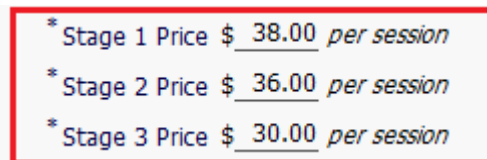
To add a Group Session, users must:

- Schedule the Group Session
- Assign the Tutor(s)
- Register Students
- Add additional charges (if applicable) to the Group Session (*e.g.* Registration Fee)

Booking > Grid View on 2013-11-11				
Location <u>MAIN</u> ... Date <u>2013-11-11</u>    Search				
TIME	DESK #1	DESK #2	DESK #3	D
08:30 - 09:00				
09:00 - 09:30				
09:30 - 10:00				
10:00 - 10:30	PL0000000052 STEPHANIE (SUBJECT SUPPORT)	BKN0000000007 DOUG MAK 778-861-6788 Diagnostic Assessment	GL0000000003 PRE-KINDERGARTEN (3- 5YRS)	
10:30 - 11:00	KYLE 10:00 - 11:00	NONE 10:00 - 11:00	JEFFREY 10:00 - 11:00	
11:00 - 11:30				

Step One: Schedule the Group Session

- Select “Business (B)” from the top menu, and click **Group Sessions**.
- Click . This will display a page for users to submit Group Session booking details.
- Enter required field information
 - Do not place apostrophes or quotation marks in the **Session Name** field.
 - Use a 24-hour time notation in the form hh:mm for **Start/ End Time**.
- Select a **Lesson Type** from the drop down menu.
 - Select “WEEKDAY” for lessons that occur only on weekdays.
 - Select “WEEKLY” for lessons that recur once a week.
- Indicate the **Price**. Enter the *same price* for all stage fields if different rates do not apply.
 - Stage 1,2 and 3 indicate a multi-level pricing structures used for varying rates.
 - Stage 1 = rates for students that come **2X**/week
 - Stage 2 = rates for students that come **3X**/ week
 - Stage 3 = rates for students that come **4-5X**/ week



* Stage 1 Price \$ 38.00 per session
* Stage 2 Price \$ 36.00 per session
* Stage 3 Price \$ 30.00 per session

(Note that these stage requirements are configurable)

- **Submit** to confirm sessions.
- Once a Group Session booking is complete, fields to add Tutors and Students will appear.

ASSIGNED TUTOR 

	Tutor Name	Date	Start Time	End Time
no data				

STUDENTS 

	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
no data					

Step Two: Assign Tutor(s) to the Group Session

A) To Add a Tutor for All the Group Lesson Sessions

- Scroll down from the “Group Sessions > Detail” page.

Group Sessions > Detail

* Session Code GL0000000003

* Session Name TEST GROUP SESSION

* Semester 2013 FALL ...

* Start Date 2013-09-23

* End Date 2013-12-16

* Start Time 10:30

* End Time 11:30

* Session Type REGULAR v

Grade Pre-Kindergarten v

* Location Code MAIN ...

Room No. 2 ...

Total Sessions 14

Sessions Left 13

Price (per sess.) \$ 30.00

SESSION SCHEDULE

	Date	Start Time	End Time	Room No.	Status
1	<u>2013-09-23</u>	10:30	11:30	2	Confirmed
2	<u>2013-09-30</u>	10:30	11:30	2	Confirmed
3	<u>2013-10-07</u>	10:30	11:30	2	Confirmed
4	<u>2013-10-14</u>	10:30	11:30	2	Confirmed

  Cancel
 Make Payment
 Print
 Delete Group

- Next to “ASSIGNED TUTORS”, click . Choose a **Tutor** from the Staff list and **Submit**.

- Repeat to add a second Tutor to all of the Group Sessions.

B) To Add a Tutor to *One* specific Group Lesson Session

- From the “SESSION SCHEDULE” table, select the underlined **Date** you want to add a specific Tutor to.

SESSION SCHEDULE					
	Date	Start Time	End Time	Room No.	Status
1	<u>2013-09-23</u>	10:30	11:30	2	Confirmed
2	<u>2013-09-30</u>	10:30	11:30	2	Confirmed
3	<u>2013-10-07</u>	10:30	11:30	2	Confirmed
4	<u>2013-10-14</u>	10:30	11:30	2	Confirmed
5	<u>2013-10-21</u>	10:30	11:30	2	Confirmed
6	<u>2013-10-28</u>	10:30	11:30	2	Confirmed
7	<u>2013-11-04</u>	10:30	11:30	2	Confirmed
8	<u>2013-11-11</u>	10:30	11:30	2	Confirmed
9	<u>2013-11-18</u>	10:30	11:30	2	Confirmed
10	<u>2013-11-25</u>	10:30	11:30	2	Confirmed
11	<u>2013-12-02</u>	10:30	11:30	2	Confirmed
12	<u>2013-12-09</u>	10:30	11:30	2	Confirmed
13	<u>2013-12-16</u>	10:30	11:30	2	Confirmed

ASSIGNED TUTOR 				
	Tutor Name	Date	Start Time	End Time
no data				

- A “Booking > Detail” page will be displayed for the specific session date.

Booking > Detail

* Reference Code GL0000000003

* Booking Type Group Session Reservation

* Recurrence WEEKLY

* Date 2013-10-07

* Start Time 10:30 *in 24H format only*

* End Time 11:30 *in 24H format only*

* Location Code MAIN ...

* Room No. 2 ...

Comment

TUTOR 

	Tutor Name	Date	Start Time	End Time
no data				

- Next to “ASSIGNED TUTORS”, click . Choose a **Tutor** to add from the list.
- **Submit.**
- Repeat to add to another date.

Step Three: Register Students to the Group Session

- Next to “STUDENTS” in the Group Detail page, click .

ASSIGNED TUTOR 

	Tutor Name	Date	Start Time	End Time
1	JEFFREY	2013-09-23	10:30	11:30
2	JEFFREY	2013-09-30	10:30	11:30
3	JEFFREY	2013-10-07	10:30	11:30
4	JEFFREY	2013-10-14	10:30	11:30
5	JEFFREY	2013-10-21	10:30	11:30
6	JEFFREY	2013-10-28	10:30	11:30
7	JEFFREY	2013-11-04	10:30	11:30
8	JEFFREY	2013-11-11	10:30	11:30
9	JEFFREY	2013-11-18	10:30	11:30
10	JEFFREY	2013-11-25	10:30	11:30
11	JEFFREY	2013-12-02	10:30	11:30
12	JEFFREY	2013-12-09	10:30	11:30
13	JEFFREY	2013-12-16	10:30	11:30

STUDENTS 

	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
no data					

- Select a **Student** from the student database window, and **Submit**.
- Select the session or sessions to enroll the student to from the Reference Selector.
Submit.

http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html

Reference Selector > Booking List

	☐	Date	Start Time	End Time	Location Code	Room No.	Status
1	☒	2013-09-23	10:30	11:30	MAIN	2	Confirmed
2	☒	2013-09-30	10:30	11:30	MAIN	2	Confirmed
3	☐	2013-10-07	10:30	11:30	MAIN	2	Confirmed
4	☐	2013-10-14	10:30	11:30	MAIN	2	Confirmed
5	☐	2013-10-21	10:30	11:30	MAIN	2	Confirmed
6	☐	2013-10-28	10:30	11:30	MAIN	2	Confirmed
7	☐	2013-11-04	10:30	11:30	MAIN	2	Confirmed
8	☐	2013-11-11	10:30	11:30	MAIN	2	Confirmed
9	☐	2013-11-18	10:30	11:30	MAIN	2	Confirmed
10	☐	2013-11-25	10:30	11:30	MAIN	2	Confirmed
11	☐	2013-12-02	10:30	11:30	MAIN	2	Confirmed
12	☐	2013-12-09	10:30	11:30	MAIN	2	Confirmed
13	☐	2013-12-16	10:30	11:30	MAIN	2	Confirmed

|ROWS:13|PAGES:1/1| <<< 1 >>> |GOTO |RECORDS PER PAGE **20**

☒ Submit ☐ Cancel

http://172.16.1.113:88/tutor/page.do | Internet | Protected Mode: On

- To enroll students to all sessions, select the top box located on the column heading.
 - **IMPORTANT:** Depending on the number of days per week selected for registration, Stage 1 or 2 or 3 rates will automatically be applied.

Reference Selector > Booking List

☒	Date	Start Time	End Time	Location Code	Room No.	Status
-------------------------------------	------	------------	----------	---------------	----------	--------

- Repeat to add another Student to the Group Session.

Step Four: Add Additional Charges (If Applicable)

- From the “STUDENTS” table in the Group Detail page, select the **student** to link the charge to, and then select **Add Inventory**.

STUDENTS 

		SID	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
1		6228	JOANNE LI		729-0722		

RELEVANT SALES 

		SID	Item Code	Item Name	Total Sales	Total Tax	Sub. Total	Payment Status
no data								

  Cancel
  Make Payment
  Print
  Delete Group
  Add Inventory

- A Sales Journal Page will be displayed for users to link Inventory.

-- Webpage Dialog 

http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html

Sales Journal > Current Sales List : GL / REF CODE : GL0000000033 

Item Code: reg  **TOTAL PRICE: \$ 30.00**

	Item Code	Item Name	Original Price	Promotion Price	Percentage Off	Quantity	Total Sales	Total Discount	Total Tax	Sub. Total
1	reg	Registration/Supplies	30.00	30.00	0.00	1.00	30.00	0.00	0.00	30.00

|ROWS:1|PAGES:1/1| << 1 >>> |GOTO|RECORDS PER PAGE 20|

 Save  Go Back

http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html

Internet | Protected Mode: On

- **Search item** by Item Code or by using the reference selector.
- **Check-in**
- **Save** item. The Item will be linked to the student by SID (Student Identification).

STUDENTS 

		SID	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
1		6228	JOANNE LI		729-0722		

RELEVANT SALES 

		SID	Item Code	Item Name	Total Sales	Total Tax	Sub. Total	Payment Status
1		6228	reg	Registration/Supplies	30.00	0.00	30.00	N

How to Add an Extra Room to a Group Session

Booking > Grid View on 2013-11-11 / 星期一

Location **MAIN** ... Date **2013-11-11** Search

TIME	DESK #1	DESK #2	DESK #3	DESK #4
08:30 - 09:00				
09:00 - 09:30				
09:30 - 10:00				
10:00 - 10:30	PL0000000052 STEPHANIE (SUBJECT SUPPORT)	BKN000000007 DOUG MAK 778-861-6788 Diagnostic Assessment	GL0000000003 PRE-KINDERGARTEN (3- SYRS)	GRPL.CRT.RSV = UNKNOWN = = NO TUTOR =
10:30 - 11:00	KYLE 10:00 - 11:00	NONE 10:00 - 11:00	JEFFREY 10:00 - 11:00	10:00 - 11:00

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Click .
- Under **Booking Type**, select “Group Session Reservation” from the drop down menu.
- Enter required field information.
- **Submit**.

How to Edit Group Session Information

- Select “Business (B)” from the top menu, and click **Group Sessions**.
 - Select the **Session Code** for the Group Session you want to make changes to. A “Group Session > Detail” page will be displayed.

OR

- Select the Group **Session Code** (i.e. GL000065) from the Grid View. A “Group Session > 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.
- Make changes.
- **Submit**.

How to Add a Private Session

To add a Private Session, users must:

- Schedule the Private Session with a Tutor
- Add the Student
- Add additional charges (if applicable) to the Group Session (*e.g.* Registration Fee)

***In order to submit a Private Session, the Private **Tutoring Rate** and **Payroll Rate** for the Tutor must be specified (Recall that these are Primary Items that need to be set up under “Management” prior to using the system).

TIME	DESK #1	DESK #2	DESK #3	D
08:30 - 09:00				
09:00 - 09:30				
09:30 - 10:00				
10:00 - 10:30	PL0000000052 STEPHANIE (SUBJECT SUPPORT) KYLE 10:00 - 11:00	BKN000000007 DOUG MAK 778-861-6788 Diagnostic Assessment NONE 10:00 - 11:00	GL0000000003 PRE-KINDERGARTEN (3-5YRS) JEFFREY 10:00 - 11:00	
10:30 - 11:00				
11:00 - 11:30				

Step One: Schedule the Private Tutoring Session

- Select “Business (B)” from the top menu, and click **Private Sessions**.



- Click . This will display a page for users to submit Private Session details.
- Enter the required field information including the **Tutor Name**.

Private Sessions > Detail

Session Name _____

Grade -- PLEASE SELECT -- ▾

* Semester _____ ...

* Tutor Name _____ ...

* Start Date _____ 

* End Date _____ 

* **Recurrence** NONE ▾

* Start Time _____ in 24H format only

* End Time _____ in 24H format only

* Location MAIN ...

* Room No. ...

* Number of Students 1 Student ▾

- Recurrence:

Select “NONE” for one-time sessions

Select “Daily” for sessions that occur on a daily-basis

Select “Weekly” for sessions that occur each week

Select “Biweekly” for sessions that occur every other week

- Note that Semi-private Sessions can be booked for up to 4 students.

- **Submit** to confirm the Session Schedule.

Note: If a *Temporary* private reservation was made for the space, it will be overwritten by the booking.

Step Two: Register a Student to a Private Session

- Scroll down. Next to “STUDENTS”, click .
- Select a **Student** from the student database window, and **Submit**.

Step Three: Add Additional Charges (If Applicable)

- From the “STUDENTS” table, select the **student** to link the charge to, and then select **Add Inventory**.

STUDENTS 

		SID	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
1		6228	JOANNE LI		729-0722		

RELEVANT SALES 

		SID	Item Code	Item Name	Total Sales	Total Tax	Sub. Total	Payment Status
no data								

  Cancel
  Make Payment
  Print
  Delete Group
  Add Inventory

- A Sales Journal Page will be displayed for users to link Inventory.

-- Webpage Dialog 

http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html

Sales Journal > Current Sales List : GL / REF CODE : GL0000000033 

Item Code: reg  **TOTAL PRICE: \$ 30.00**

	Item Code	Item Name	Original Price	Promotion Price	Percentage Off	Quantity	Total Sales	Total Discount	Total Tax	Sub. Total
1	reg	Registration/Supplies	30.00	30.00	0.00	1.00	30.00	0.00	0.00	30.00

|ROWS:1|PAGES:1/1| << 1 >> |GOTO|RECORDS PER PAGE 20|

 Save  Go Back

http://172.16.1.113:88/tutor/page.do?targetPage=/CoreFrame/FrameSelect.html

Internet | Protected Mode: On

- **Search item** by Item Code or by using the reference selector.
- **Check-in**
- **Save** item. The item will be linked to the student by SID (Student Identification)

STUDENTS 

		SID	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
1		6228	JOANNE LI		729-0722		

RELEVANT SALES 

		SID	Item Code	Item Name	Total Sales	Total Tax	Sub. Total	Payment Status
1		6228	reg	Registration/Supplies	30.00	0.00	30.00	N

How to Reserve a Temporary Private Session

This reservation function allows users to reserve space for private sessions. Temporary reservations can be overwritten by scheduled Private Sessions.

Booking > Grid View on 2013-11-11 /

Location MAIN ... Date 2013-11-11 Reset Search

TIME	DESK #1	DESK #2	DESK #3	DESK #4	DESK #5
08:30 - 09:00					
09:00 - 09:30					
09:30 - 10:00					
10:00 - 10:30	PL0000000052 STEPHANIE (SUBJECT SUPPORT) KYLE	BKN000000007 DOUG MAK 778-861-6788 Diagnostic Assessment NONE	GL0000000003 PRE-KINDERGARTEN (3- 5YRS) JEFFREY	GRPLCRT.RSV = UNKNOWN = = NO TUTOR =	
10:30 - 11:00	10:00 - 11:00	10:00 - 11:00	10:00 - 11:00	10:00 - 11:00	
11:00 - 11:30	TMP.RESERVED = UNKNOWN = = NO TUTOR =				
11:30 - 12:00	11:00 - 12:00				

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Click . This will display a page for users to submit booking details.
- Select “Private Session Reservation” for the **Booking Type** from the drop down menu.
- Enter the required field information, including a **Comment** to note any reservation details.

Booking > Detail

* Booking Type Private Session Reservation ▼

* Recurrence NONE ▼

* Date

* Start Time _____ *in 24H format only*

* End Time _____ *in 24H format only*

* Location Code MAIN ...

* Room No. ...

Comment

- Select “NONE” Recurrence for one-time temporary reservations.
- Daily, Weekly, and Bi-weekly recurrences are pre-set configurations. By default, they are set at 7 days, 12 weeks, and 12 months. To changes these settings, users must contact Movidia system providers.
- **Submit.**

How to Remove a Temporary Private Session

Temporary reservations can be overwritten by scheduled Private Sessions. To remove temporary private reservations for other booking types, do the following:

- Locate the Temporary Session booking on Grid View.
- Select the booking cell.
- To move the reservation, select the  Move button.

OR

- To move the reservation completely, select  VOID. See on-screen options to void a single temporary booking, or void all onward related temporary bookings.

OUTSTANDING BALANCES

How to Email an Outstanding Balance

- Select “Management (M)” from the top menu, and click **Students**.
- Select the student account.
- Scroll down. Next to "Total Unpaid Amount", select **Show Details**.

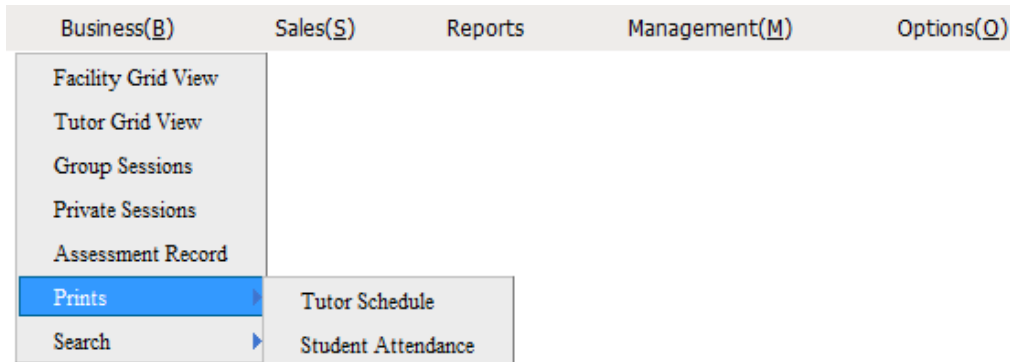
IN-STORE CREDIT INFORMATION	
Hours	0.00
Credit Amount	0.00
Debt Allowance	100.00
Total Unpaid Amount	988.00
 Show Details	

- Check details and select  Email Outstanding Details.

SCHEDULE & ATTENDANCE PRINTING

How to View and Print Tutor Schedules

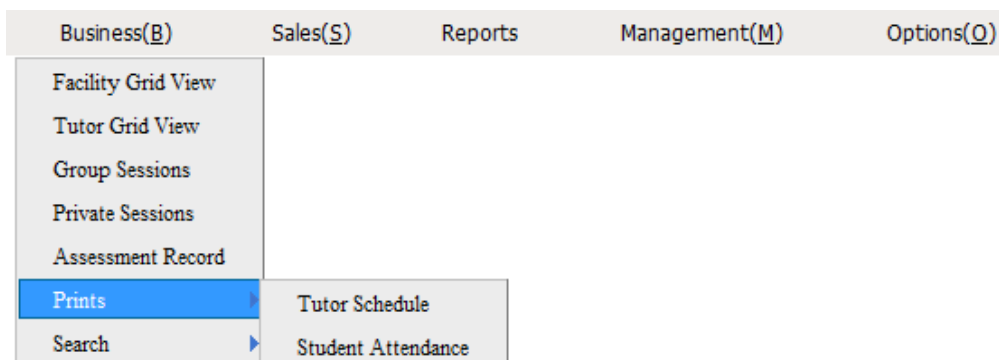
- Select “Business (B)” from the top menu, and click **Prints > Tutor Schedule**.



- Choose a Tutor by clicking the reference selector .
- Select a Date Range.
 - To show a *Weekly Calendar View*, select a date range that starts on a Sunday and ends on a Saturday (*i.e.* Sunday, September 8 – Saturday, September 14).
 - All other Date Range selections will show Tutor schedules in *List View* form.
- Click Search.

How to View and Print Daily Student Attendance

- Select “Business (B)” from the top menu, and click **Search > Student Attendance**.



- Select the current date.
- Click Search.
 - All facility students scheduled to come in for group and private sessions, or diagnostic assessments will be listed.

CHECK-IN MANAGEMENT

What is Check-in Management



Check In Management allows users to indicate that a session has occurred. This feature is available for all facility bookings, and is required in order to track Tutor attendance for payroll report calculations. In the case that a private or group session is NOT checked in, the session will not count towards the Tutor's payroll.

How to Check-in a Session

- Select "Business (B)" from the top menu, and click **Booking - Grid View**
- Click anywhere on the Booking cell box *except* on the Session/Reference Code (*i.e.* GL00000065).

09:00 - 09:15	PL0000000022				
09:15 - 09:30	PRIVATE SESSION -				
09:30 - 09:45	TAMMY (GRADE 2) -				
	MATH				
	JEFFREY				
09:45 - 10:00	09:00 - 10:00				
10:00 - 10:15					
10:15 - 10:30					
10:30 - 10:45					
10:45 - 11:00					
11:00 - 11:15					
11:15 - 11:30					

Session Cell Box



Booking > Detail

* Reference Code PL0000000022

* Booking Type Private Session Reservation

* Recurrence NONE

* Date 2013-09-23

* Start Time 09:00 in 24H format only

* End Time 10:00 in 24H format only

* Location Code MAIN

* Room No. 1

Comment

TUTOR

	Tutor Name	Date	Start Time	End Time
1	JEFFREY	2013-09-23	09:00	10:00

STUDENTS

		Student Name	Due Amount	Tax Amount	Total Amount	Payment Status
1		TAMMY WONG 778-882-6696	50.00	0.00	50.00	Y

Cancel
 Check In
 Print
 Move
 Make Payment

- Click the **Check In** button. The booking will automatically change colors to show current status. See "Color Code Key for Grid View"

09:00 - 09:15	PL0000000022			
09:15 - 09:30	PRIVATE SESSION -			
09:30 - 09:45	TAMMY (GRADE 2) -			
09:45 - 10:00	MATH			
10:00 - 10:15	JEFFREY			
	09:00 - 10:00			

(Note: Check-ins must be performed carefully. Once a booking is checked in, it may no longer be reversed by system users).

IMPORTANT: Check-ins need to be made in order for Tutor Payroll to be calculated. Users have a grace period of *30 days* to perform all check-ins.

PAYMENT

How to Make an Inventory Sale

Inventory Sales include payments for the following categories: Workbooks, Reading Books, Flash Cards, School Supplies, Drop-in, Assessment, Term Fees, and other Miscellaneous termed items.

- 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).

- Scan the **Item Code** into the system using a barcode scanner.

OR

- Click  to select an item from the inventory database. **Submit** and click the **Check In** button to add item to sales list.

For Price Adjustments

- Click on the **Item Code**.

M Sales Journal > Current Sales List : A

Item Code ... ☒ Check In **TOTAL PRICE: \$ 16.79**

Item Code	Item Name	Original Price
1234567	ABC Reading Book	15.99

M Sales List > Info

* Item Code

* Item Name

Original Price

Promotion Price

Percentage Off %

Quantity

- Type in a **Promotion Price** OR percentage discount (**Percentage Off**). **Submit** to adjust price.

To Start a New Sales List

- Click the “Go Back” button.
- Repeat to add another item.
- Once all items are added to the Sales List, click the **Make Payment** button to proceed to check out.
- A message will be displayed to confirm the procedure. Click **OK**.
- Input the required field information

POS > Make Payment

* POS Code P00000000039

Reference Code SJ0000000003

* Date 2013-09-23

* Time 10:35

Customer Name TEST ACCOUNT 604-

Sales Amount 15.99

Tax Amount 0.80

Percentage Off %

Final Due Amount 16.79

Payment Source Visa Card

Pay Amount 16.79

Change Amount 0

Comment

- Note: A Customer Name does not have to be included to make a sale. However, linking sales to customer accounts allow users to perform credit-backs in the case of a refund. Click to select a Customer.
- Select the **Payment Method**.
- Enter the amount paid by typing into the **Pay Amount** field.
- **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 Group Session Payment

- Select “Business (B)” from the top menu, and click **Group Sessions**.
- Select the Group **Session Code**.
- Scroll down. Under “STUDENTS” select the student **Name**, and click the **Make Payment** button.

STUDENTS 

	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone
1 	TEST ACCOUNT 604-278-2773	Kindergarten	123-123-1234	604-278-2773	604-123-1234


 Cancel
  **Make Payment**
 Print
  Delete Group

- A message will be displayed to confirm the procedure. Click **OK**.
- A “POS > Make Payment” page will be displayed (*Note: If a group session has already been paid for, the system will notify users that the transaction “has been paid off”*).
- Input the required field information

POS > Make Payment

* POS Code P00000000040

Reference Code GL0000000003-1

* Date 2013-09-23

* Time 10:42

Customer Name TEST ACCOUNT 604- 

Sales Amount 390.00

Tax Amount 0.00

Percentage Off %  Discount  Reset

Final Due Amount 390.00

Payment Source Visa Card 

Pay Amount 390.00

Change Amount 0

Comment Group Lesson TEST GROUP SESSION [GL0000000003] at [10:30-11:30] from [2013-09-23] to [2013-12-16] for customer [TEST ACCOUNT 604-278-2773]

- Select the **Payment Method**.
- Enter the amount paid by selecting or typing into the **Pay Amount** field.
- **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”).
- To make payments for Additional Charges linked to the group session, see "How to Make Payments for Sales Related to Group & Private Registration"

How to Make a Private Session Payment

- Select “Business (B)” from the top menu, and click **Private Sessions**.
- Select the Private Session by clicking the **Session Code**.

To Pay for the Private Sessions in Full

- Scroll down. Under “STUDENTS” select a row from the table and click the **Make Payment** button.

STUDENTS [MAXIMUM: 1] 

		Student Name	Date	Due Amount	Tax Amount	Total Amount	Payment Status
1	☐	TEST ACCOUNT 604-278-2773	2013-09-16	50.00	0.00	50.00	<u>N</u>
2	☐	TEST ACCOUNT 604-278-2773	2013-09-23	50.00	0.00	50.00	<u>N</u>
3	☒	TEST ACCOUNT 604-278-2773	2013-09-30	50.00	0.00	50.00	<u>N</u>
4	☐	TEST ACCOUNT 604-278-2773	2013-10-07	50.00	0.00	50.00	<u>N</u>
5	☐	TEST ACCOUNT 604-278-2773	2013-10-14	50.00	0.00	50.00	<u>N</u>
6	☐	TEST ACCOUNT 604-278-2773	2013-10-21	50.00	0.00	50.00	<u>N</u>
7	☐	TEST ACCOUNT 604-278-2773	2013-10-28	50.00	0.00	50.00	<u>N</u>
8	☐	TEST ACCOUNT 604-278-2773	2013-11-04	50.00	0.00	50.00	<u>N</u>
9	☐	TEST ACCOUNT 604-278-2773	2013-11-11	50.00	0.00	50.00	<u>N</u>
10	☐	TEST ACCOUNT 604-278-2773	2013-11-18	50.00	0.00	50.00	<u>N</u>


 Cancel
  Make Payment

- Note: Clicking on the Student Name will direct users to the student account.
 - A message will be displayed to confirm the procedure. Click **OK**.
- Input the required field information
 - Select the **Payment Method**.
 - Enter the amount paid by selecting or typing into the **Pay Amount** field.

POS > Make Payment

* POS Code P00000000043

Reference Code PL0000000021-1

* Date 2013-09-23

* Time 11:02

Customer Name TEST ACCOUNT 604-2 ...

Sales Amount 500.00

Tax Amount 0.00

Percentage Off %

Final Due Amount 500.00

Payment Source Visa Card ▼

Pay Amount 500.00

Change Amount 0

Comment Private Lesson PRIVATE SESSIONS TEST [PL0000000021] with tutor ELLEN for student [TEST ACCOUNT 604-278-2773].

- **Submit** payment. The payment status will be updated to show “Y” in the Payment status column.
 - 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”).
- To make payments for Additional Charges linked to the group session, see "How to Make Payments for Sales Related to Group & Private Registration"

How to Make a Payment for Inventory Sales Related to Group or Private Registration

- Select “Business (B)” from the top menu, and click **Private Sessions** or **Group Sessions**.
- Locate the booking by clicking the **Session Code**.

For Sales Related to Private Sessions:

- Select the item, and click Pay Inventory

RELEVANT SALES							X
		Item Code	Item Name	Total Sales	Total Tax	Sub. Total	Payment Status
1	☒	reg	Registration/Supplies	30.00	0.00	30.00	N

Cancel
 Make Payment
 Add Inventory
 Pay Inventory

For Sales Related to Group Sessions:

- Identify the Student's I.D.number (**SID** column).
- Select the sales item linked to the student, and click **Pay Inventory**.

STUDENTS								+/-
		SID	Student Name	Grade	Mobile Phone	Home Phone	Emergency Phone	
1	☒	1	MELISSA WINTERS 604-278-2773	Kindergarten	123-123-1234	604-278-2773	604-123-1234	
2	☐	2	TANYA LITTLE 604-271-0658	Grade 5	604-222-2222	604-271-0658	604-111-1111	
3	☐	1018	JACK PALMER 123-123-1234	Grade 3	123-123-1234	123-123-1234	778-128-3717	

RELEVANT SALES								X
		SID	Item Code	Item Name	Total Sales	Total Tax	Sub. Total	Payment Status
1	☒	1	reg disc.	Registration/Supplies	15.00	0.00	15.00	N
2	☐	2	reg	Registration/Supplies	30.00	0.00	30.00	N
3	☐	1018	reg	Registration/Supplies	30.00	0.00	30.00	N

Cancel
 Make Payment
 Print
 Delete Group
 Add Inventory
 Pay Inventory

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**.

POS > Make Payment

* POS Code P00000000043

Reference Code PL0000000021-1

* Date 2013-09-23

* Time 11:02

Customer Name TEST ACCOUNT 604-2 ...

Sales Amount 500.00

Tax Amount 0.00

Percentage Off %

Final Due Amount 500.00

Payment Source Visa Card

Pay Amount 200.00

Change Amount 0.00

Comment Private Lesson PRIVATE SESSIONS TEST [PL0000000021] with tutor ELLEN for student [TEST ACCOUNT 604-278-2773].

Message from webpage

Are you sure you would like to proceed with a split payment?

- A new POS payment page will be displayed. Note the previous payment submission at the bottom (see sample below).

POS > Make Payment

* POS Code P00000000044

Reference Code PL0000000021-1

* Date 2013-09-23

* Time 11:02

Customer Name TEST ACCOUNT 604-2 ...

Sales Amount 500.00

Tax Amount 0.00

Final Due Amount 300.00

Payment Source -- PLEASE SELECT --

Pay Amount

Change Amount

Comment Private Lesson PRIVATE SESSIONS TEST [PL0000000021] with tutor ELLEN for student [TEST ACCOUNT 604-278-2773].

	POS Code	Payment Source	Pay Amount	Change Amount
1	P00000000043	Visa Card	200.00	0.00

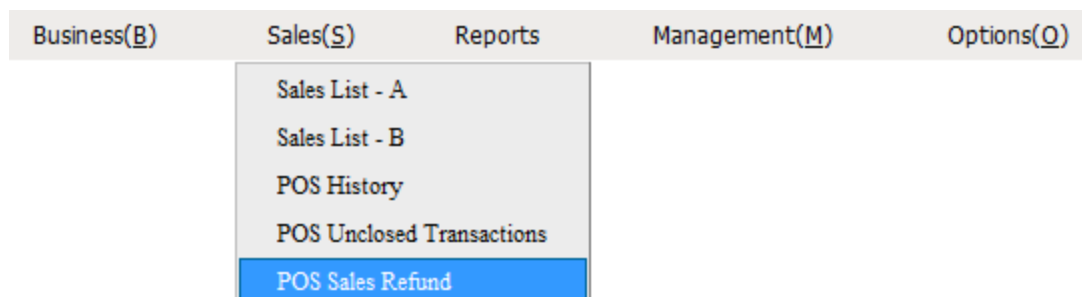
- Repeat the payment procedures by selecting another **Payment Method**.
- Enter the amount paid by typing into the **Pay Amount** field.
- Leave a **Comment** (not required).
- **Submit** payment. The payment status will be updated to show “Y” in the Payment status column.
- A receipt showing the split payment will be displayed. **Close the window OR Print**.

STUDENT CANCELLATIONS & REFUNDS

Refund payments are automatically given to Student’s in the form of credit when a Group or Private Session is cancelled. Inventory Sale items are also refunded as credit to the Student Account.

How to Make an Inventory Sales Refund

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



- Locate the Item using the top Search fields. Click the underlined **POS Code**.

POS > Sales Refund								
Customer Name		...	Date	Invoice No	Item Code/Name	Reset	Search	
	POS Code	Customer Name	Reference Code	Date	Time	Final Due Amount	Pay Amount	Change Amount
1	<u>P00000000039</u>	TEST ACCOUNT 604-278-2773	SJ0000000003	2013-09-23	10:35	16.79	16.79	0.00
2	<u>P00000000032</u>	TEST ACCOUNT 604-278-2773	SJ0000000001	2013-09-20	11:27	16.79	16.79	0.00

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

POS > Transaction Detail

* POS Code P000000000046

* Date 2013-09-23

* Time 13:07

Payment Source Visa Card

Customer Name TEST ACCOUNT 604-

Sales Amount 31.98

Tax Amount 1.60

Final Due Amount 33.58

Pay Amount 33.58

Change Amount 0.00

Invoice No V000000000020

Status OPEN

Comment ABC READING BOOK [QTY 2]

	Item Code	Item Name	Quantity	Total Sales	Total Tax	Sub. Total
1	234567	ABC Reading Book	2.00	31.98	1.60	33.58

☒ Submit ☐ Cancel

- Indicate the **Quantity** to refund. Submit.

Sales Journal > Info

* Item Code 1234567

* Item Name ABC Reading Book

Original Price 15.99

Promotion Price 15.99

Quantity 2.00

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

How to Cancel a Diagnostic Assessment

To cancel a Diagnostic Assessment, users must

- Cancel the scheduled assessment booking
- Remove the Tutor Assessment record

Step One: Cancel the Assessment Booking

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Locate the Assessment booking. Select the **Reference Code** or click anywhere in the cell box.
- A “Booking > Detail” page will be displayed. Click  **VOID**.
- 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 assessment booking ONLY.
 - Select **OK** to cancel the booking AND all the related onward assessment bookings.

Step Two: Cancel the Tutor scheduled for the Assessment

- Select “Business (B)” from the top menu, and click **Assessment Record**.
- Locate the Tutor Session, and select the **Tutor Name**.
- **Delete**.

How to Cancel a Drop-in Booking

- Select “Business (B)” from the top menu, and click **Booking - Grid View**.
- Select the drop-in **Reference Code** (*i.e.* DP00000359) OR click anywhere in the booking cell box.
- A “Booking > Detail” page will be displayed. Click  **VOID**.
- 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.

How to do Group Session Cancellations and Refunds

Users have the following 3 options when cancelling Group Sessions:

A) Cancel an *Entire* Scheduled Group Session

- All of the group sessions will be removed.
 - Payments are credited back to ALL registered students.
 - Locate the Group Session
 - On the **Grid View**, select the group session **Reference Code** (*i.e.* GL0000028).
- OR
- Select “Business (B)” from the top menu, click **Group Sessions**, and click the reference code from the “Session Code” column

M Group Sessions > Detail

* Session Code GL0000000003

* Session Name TEST GROUP SESSION

* Semester 2013 FALL ...

* Start Date 2013-09-23

* End Date 2013-12-16

* Start Time 10:30

* End Time 11:30

* Session Type REGULAR ▾

Grade Pre-Kindergarten ▾

* Location Code MAIN ...

Room No. 2 ...

Total Sessions 14

Sessions Left 12

Price (per sess.) \$ 30.00

SESSION SCHEDULE

	Date	Start Time	End Time	Room No.	Status
1	<u>2013-09-23</u>	12:00	13:00	2	Finished
2	<u>2013-09-30</u>	10:30	11:30	2	Confirmed
3	<u>2013-10-07</u>	10:30	11:30	2	Confirmed
4	<u>2013-10-14</u>	10:30	11:30	2	Confirmed

Cancel | Make Payment | Print | **Delete Group**

- Click **Delete Group**.

- Confirm the cancellation by selecting **OK**.
- Refunds will automatically be credited back to all registered Students in the form of in-store Credit. To refund the credit amount, see section on “CASHBACKS”.

OR

B) Remove a Student from *One* Group Session

- The student will be removed from the specified group session date.
- Payment is credited back to the student for the single session.
- Locate the Group Session Date
 - On the **Grid View** – Search the date of the group session and click the **Session Booking Cell**. A “Booking > Detail” page will be displayed

OR

- From **Group Sessions** – Search the group session and click the reference code from the “Session Code” column.
 - Scroll down to the “SESSION SCHEDULE” table.
 - Select the date to remove the student from. A “Booking > Detail” page will be displayed.
- Scroll down to the list of registered students. Select the student and click  next to “STUDENTS”.

Booking > Detail

* Reference Code GL0000000003

* Booking Type Group Session Reservation

* Recurrence WEEKLY

* Date 2013-11-25

* Start Time 10:30 *in 24H format only*

* End Time 11:30 *in 24H format only*

* Location Code MAIN ...

* Room No. 2 ...

Comment

TUTOR   

		Tutor Name	Date	Start Time	End Time
1	☒	JEFFREY	2013-11-25	10:30	11:30

STUDENTS 

		Student Name	Due Amount	Tax Amount	Total Amount	Payment Status
1	☒	TEST ACCOUNT 604-278-2773	30.00	0.00	30.00	Y

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

OR

C) Remove a Student from All Sessions of a Group

- The student will be removed from all future sessions starting after the current date/time.
- Payments are credited back to the student for all future sessions.
- Locate the Group Session Date
 - On the **Grid View** – Search the group session and click the **Session Booking Cell**. A "Booking > Detail" page will be displayed.

OR

- From **Group Sessions** – Search the group session and click the reference code from the “Session Code” column.
 - Scroll down to the “SESSION SCHEDULE” table.
 - Select any date to open a “Booking > Detail” page.
- Scroll down to the list of registered students. Select the student and click  next to “STUDENTS”.

 **Booking > Detail**

* Reference Code GL0000000003

* Booking Type Group Session Reservation

* Recurrence WEEKLY

* Date 2013-11-25

* Start Time 10:30 *in 24H format only*

* End Time 11:30 *in 24H format only*

* Location Code MAIN ...

* Room No. 2 ...

Comment

TUTOR   

		Tutor Name	Date	Start Time	End Time
1		JEFFREY	2013-11-25	10:30	11:30

STUDENTS 

		Student Name	Due Amount	Tax Amount	Total Amount	Payment Status
1		TEST ACCOUNT 604-278-2773	30.00	0.00	30.00	Y

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

How to do Private Session Cancellations and Refunds

Users have the following 2 options when cancelling Private Sessions:

A) Cancel a *Single* Private Session

- The specified single private session will be removed.
- Payment is credited back to the student for the single session.
- Locate the Private Session
 - On the **Grid View**, select the private session **Reference Code** (*i.e.* PL0000028).
 - OR
 - Select “Business (B)” from the top menu, click **Private Sessions**, and click the reference code from the “Session Code” column
- A Private Sessions > Detail page will be displayed.
- Scroll down to the list of confirmed session dates. Select the reference selector next to the sessions date.

SESSION SCHEDULE ✕							
		Date	Start Time	End Time	Location Code	Room No.	Status
1	☒	<u>2013-10-01</u>	10:30	11:30	MAIN	1	Confirmed
2	☐	<u>2013-10-08</u>	10:30	11:30	MAIN	1	Confirmed
3	☐	<u>2013-10-15</u>	10:30	11:30	MAIN	1	Confirmed

- Next to “SESSION SCHEDULE”, click the ✕ button.
- 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 if a payment was received*)

B) Cancel an *Entire* Facility Scheduled Private Session

- All future private sessions from the current date will be removed.
- Payments for the private sessions are credited back to the student.
- Locate the Private Session
 - On the **Grid View**, select the private session **Reference Code** (*i.e.* PL0000028).

OR

- Select “Business (B)” from the top menu, click **Private Sessions**, and click the reference code from the “Session Code” column
- A Private Sessions > Detail page will be displayed.
- Click the ✕ button located on the bottom left-hand corner of the screen.
- Confirm the cancellation by selecting **OK**.
 - Refunds will automatically be credited back to the registered Student in the form of in-store Credit. To refund the credit amount, see section on “CASHBACKS”.

TUTOR CANCELLATIONS

How to Add a Substitute for a Single Group Session

- Remove the current Tutor from the group session date
 - Select “Business (B)” from the top menu, and click **Group Sessions**.
 - Select the Group Session Reference Code under the Session Code column. A “Group Sessions > Detail” page will be displayed.
 - Scroll down and select the **Date** you want to replace a Tutor from. A “Booking > Detail” page will be displayed.
 - Select the Tutor and click ✕ next to “TUTOR”.
 - A confirmation message will be displayed. Select **OK**.
- Add the new Tutor to the Group Session date by clicking ➕ next to “TUTOR”

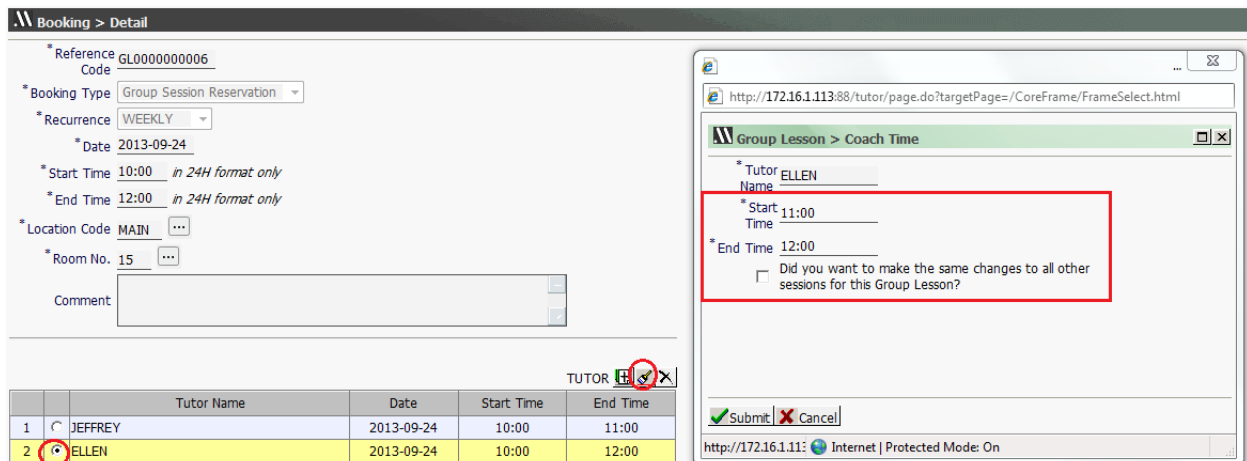
How to Remove a Tutor from a Group Session

- Remove the current Tutor from the group session date
 - Select “Business (B)” from the top menu, and click **Group Sessions**.
 - Select the Group Session Reference Code under the Session Code column. A “Group Sessions > Detail” page will be displayed.
 - Scroll down and select the **Date** you want to replace a Tutor from. A “Booking > Detail” page will be displayed.
 - Select the Tutor and click ✕ next to “TUTOR”.
 - A confirmation message will be displayed. Select **OK**.

- Repeat to Remove the Tutor from another session.

How to Change Tutor Schedule in a Group Session

- Locate the Tutor from the group session
 - Select “Business (B)” from the top menu, and click **Group Sessions**.
 - Select the Group Session Reference Code under the Session Code column. A “Group Sessions > Detail” page will be displayed.
 - Scroll down and select the **Date** you want to make changes from. A “Booking > Detail” page will be displayed.
 - Scroll down. Select the Tutor and click  next to “TUTOR”.



Booking > Detail

*Reference Code: GL0000000006

*Booking Type: Group Session Reservation

*Recurrence: WEEKLY

*Date: 2013-09-24

*Start Time: 10:00 in 24H format only

*End Time: 12:00 in 24H format only

*Location Code: MAIN

*Room No.: 15

Comment:

	Tutor Name	Date	Start Time	End Time
1	JEFFREY	2013-09-24	10:00	11:00
2	ELLEN	2013-09-24	10:00	12:00

Group Lesson > Coach Time

*Tutor Name: ELLEN

*Start Time: 11:00

*End Time: 12:00

☐ Did you want to make the same changes to all other sessions for this Group Lesson?

Submit Cancel

http://172.16.1.11: Internet | Protected Mode: On

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

IN-STORE CREDIT RETURNS

How to Return Student Credit to an Original Payment

- Go into the Student Account by selecting “Management (M)” from the top menu, and by clicking **Students**.
- Select the **Student Name**.
- Scroll down to “IN-STORE CREDIT INFORMATION”. Users can view the maximum credit to return in the “Credit Amount” field.

IN-STORE CREDIT INFORMATION	
Hours	0.00
Credit Amount	494.93
Debt Allowance	0.00
Total Unpaid Amount	100.00 Show Details

[Cancel](#) |
 [Edit Debt Allowance](#) |
 [Show Credit History](#) |
 [Manage Instore Credit](#) |
 [Show POS History](#)

- Click **Manage In-Store Credit**.
- Select “CASHBACK” for the **Transaction Type**.

Credit Transaction > Detail

* Customer Name TEST ACCOUNT 604-...

* Transaction Type **CASH BACK**

Credit

Comment

- In the **Credit** field box, type in the amount of in-store credit to return.
- **Submit**. A “POS > Make Payment” page will be displayed.
- Indicate the original **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 SALES (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.

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 performed.

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.
- 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)

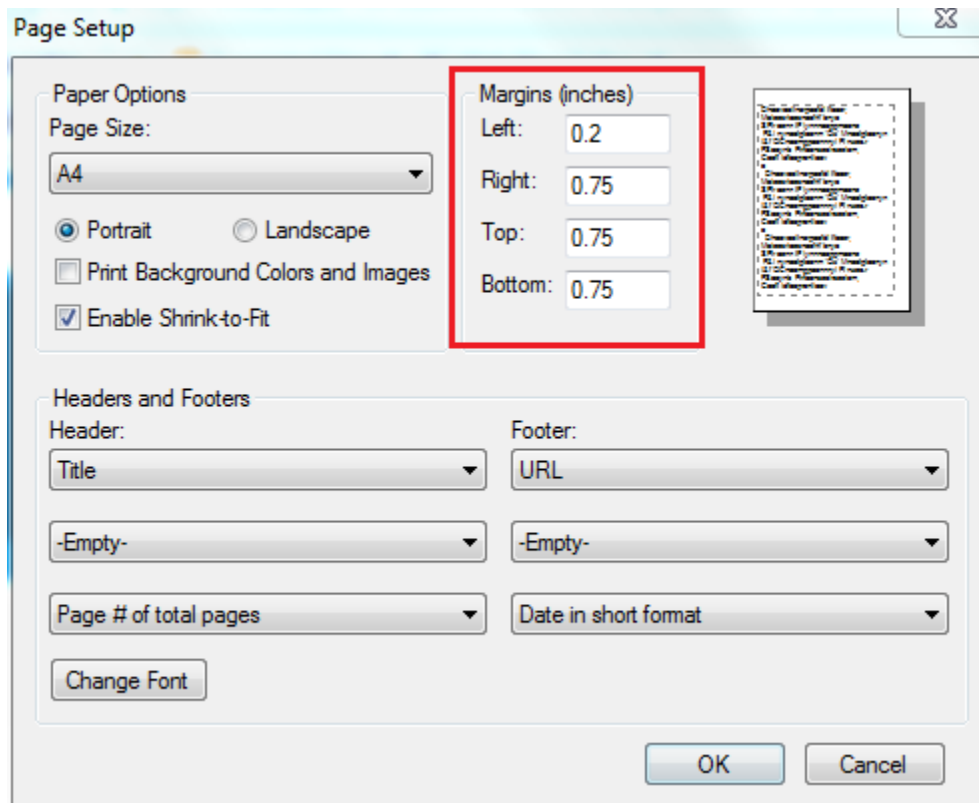
RECEIPT PRINTING & EMAILING

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 by doing the following:

- 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** the margins to 0, and click OK.
 - The margins will be readjusted automatically to the printer minimum.
- Click **OK**.

How to Send an Electronic Reciept

Electronic reciepts can be sent to customers once the payment is collected. This can be done through the...

A) Student Accounts

- Select “Management (M)” from the top menu, and click **Students**.
- Select a **Student Name**.
- Click  **Show POS History**.

OR

B) POS History

- Select “Sales (S)” from the top menu, and click **POS History**.
- Search the **Student Name** using the reference selector  and specify Date(s).
- From the reference selection, choose the item(s) to include in the invoice.
 - NOTE: If search fields are required to locate invoice items, use the **POS History** page method. From there, users can search Student Name, refine the search by including dates, and proceed.
- Once all items to include are selected, click  **Preview Invoice**. A message will be displayed.
 - Select OK to show all details related to the items selected.
 - Select CANCEL to show a summary of the items selected.
- Click the “Email Invoice” button located at the top left-hand corner of the window. A message will be displayed to confirm that the email has been sent.

IMPORTANT: If any changes (*i.e. password changes*) are made to the existing *outgoing* email address, please inform Movidia System Providers.

REPORTS

How to Generate Tutor Payroll Reports

- Select “Reports (R)” from the top menu, and click **Payroll Report**.
- Select a Tutor Name.
- Indicate a Start and End Date for the report using .
- Generate the report by selecting  **Search**.

How to Generate a Daily Sales Report

- Select “Reports (R)” from the top menu, and click **Sales Report**.
- Select the **Location** by clicking .
- Indicate the day by using .
- Generate the report by selecting  **Search**.

How to Generate a Monthly Sales Report

- Select “Reports (R)” from the top menu, and click **Sales Report**.
- Select the **Location** by clicking .
- Indicate the month by typing into the text box (*YYYY-MM format*).
- Generate the report by selecting  **Search**.

How to Generate Student Reports

- Select “Reports (R)” from the top menu.

To Generate a Student Registration History Report:

- Click **Student Registration History**.
- Select a **Student Name**.
- Indicate a Start and End Date for the report using .
- Generate the report by selecting  **Search**.
- Print a receipt by clicking “**Printable Version**”. A receipt format will be displayed for receipt printing. See “How to Print a Receipt”.

To Generate a Student Purchase History Report:

- Click **Student Purchase History**.

- Select a **Student Name**.
- Indicate a Start and End Date for the report using .
- Generate the report by selecting  **Search**.

To Generate a Outstanding Balance Report:

- Click **Outstanding Balance Report**.
- Select a **Student Name**.
- Generate the report by selecting  **Search**.
- For an up-to-date Outstanding Balance, click the check box labelled “Up to today”.

OPTIONS

How to Configure Access Control

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

To Add a Role

- Open the “Role Management > Detail” page by clicking .
- Input the required field information
 - The **Role Code** can be any 4 digit number used to identify access control (The initial pre-configured codes are 1001,1002, and 1003)
- Add a **Comment**.
- Select the **Function(s)** available from the Top Menu to the user Role.
- **Submit**.

To Remove an Existing Role

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

How to Add a New User

- Select “Options (O)” from the top menu, and click **User Management**.
- Open the “User Management > Detail” page by clicking .

- Enter the required field information.
- **Submit.**

How to Edit an Existing 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.
- **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**.