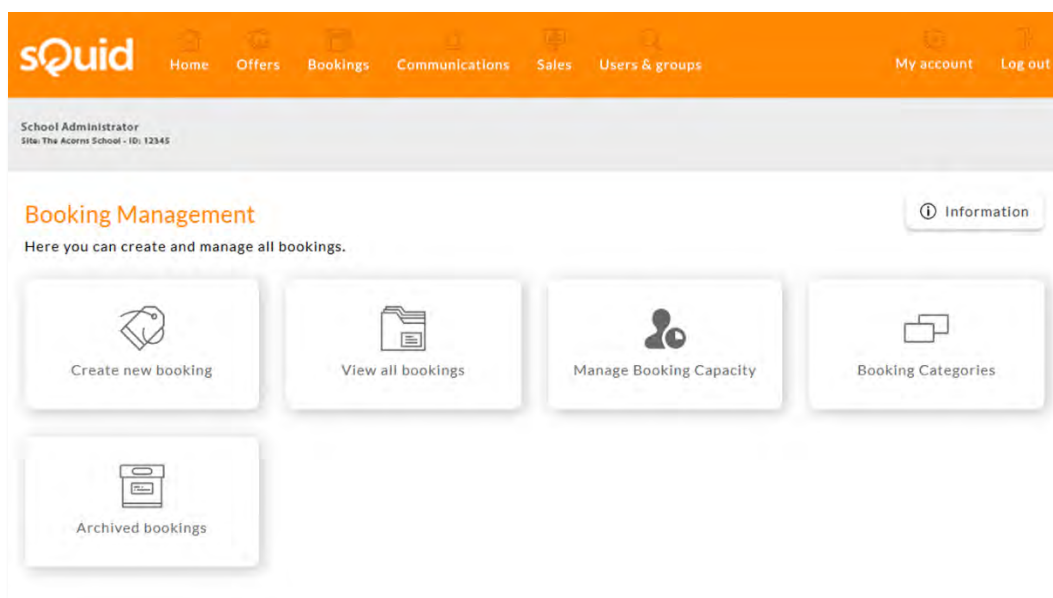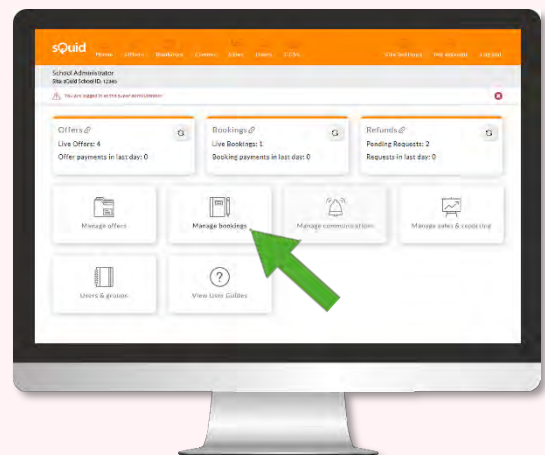# Bookings
sQuid Trips & Offers User Guide

Home page: MANAGE BOOKINGS

Select Manage bookings to create, view and amend bookings.

A **booking** is when you wish to make a range of date- or time-based purchase options available to an end user (parent/guardian) **via sQuid Trips & Offers.**

An example of a **booking** might be a breakfast club that runs between 7am and 9am Monday to Friday, and which parents can pay for in 30 minute slots – 4 time slots per day, 20 per week. The booking system allows you to create these slots in a calendar and make them available for parents to book and pay for online.

- Select **Create new bookings** to add bookings
- Select **View all bookings** to see all live, upcoming, paused and expired bookings. The bookings can also be edited from this screen
- Select **Booking categories** to view your list of booking categories
- Select **Archived bookings** to view all bookings that have been archived. **Expired** bookings can be added to this section from within the **View all bookings** area

01 Create new booking

When creating a new booking, please note the system runs on a **traffic light system**. Any fields highlighted in **red** are **mandatory** and any in **green** are **optional** or already completed. There are several steps involved in creating a booking.

01.1 Step 1: Details

- First, select the **Settlement account** (bank account) that you wish to have funds for this offer transferred to upon payment

- Select the **ledger code** from the drop-down box. *Note:* **Add new ledger code** *may only be available to some administrators, depending on permission rights assigned*

- Select the **offer category** from the drop-down box. *Note:* **Add new category** *may only be available to some administrators, depending on permission rights assigned*

- Choose an **icon** for the offer from the drop-down box underneath

- Enable **childcare vouchers** if applicable

- Select the **date and time** that you would like the offer **to go live**

  - *If you do not want the offer to go live immediately, untick and select the start date and time*

- Select the **date and time** that you would like the offer to be **end**

- If the offer has an **expiry date**, untick, and select end date and time

- Enter a **name** for your booking. This is the name that the end user will see when logged in to their account

- You can enter a brief **description** for the booking in the box underneath. This can include any **important information or further details** (please note the 500-character limit)

- You can enable **attendance recording** for the booking by ticking on the **Require attendance register** option

    Once all of the information has been completed for this section, click **Save and proceed**.

01.2 Step 2: Price, quantity and frequency

- Enter the **price** you wish the user to pay for each booking slot. For example, if running an after school club with half hourly slots available, the price would be the half hourly slot price

- Enter the **number of slots** available to sell. For example, the after school club may have a capacity of 25 pupils, so the quantity would be 25

- To enable a **waiting list** for your booking if it is oversubscribed, tick the option at the top of the screen

- **Select frequency** from the drop-down options. For example, if choosing **weekly**, the days of the week are displayed and you can select the days for which you wish the booking to be available

- Once days are selected, you can enter the **dates** you wish the slot to be available between and the **times** of the slots. For example, After school care, Mon-Fri, slots for 3.45-4.45 and 4.45-5.45

- Alternatively, you can set up a **one-off booking** by selecting this option, and **entering the date and time**

- You can add a **cut-off time** for your booking - a time before the slot occurs, but after which it will **no longer be available** to book

- Once you have added all relevant slots, click **Save and proceed**

01.3 Step 3: Additional information

In this section, you can add any **additional requirements to be completed** for the booking by the end user, e.g. consent forms, information on the offer or any mandatory questions to be completed.
(N.B. these actions are the same as for Offers).

- **Download a file** – allows a file to be downloaded by the end user, e.g. a consent form

- **Upload a file** – allows a file to be uploaded by the end user, e.g. a signed consent form

- **Answer a question** – allows the end user to answer a question. You can choose to make this mandatory

- **View a web link** – allows the end user to view a web link for more information, e.g. London Zoo website

- **View additional information** – allows the end user to view any additional information regarding the offer

- **Answer a yes/no question** – allows the end user to answer a yes/no question to be answered at checkout

sQuid

- **Select from list of options** – allows the end user to select from different options, e.g. uniform size
- **Agree to a term or condition** - you can enter any term or condition that the user must agree to

*Please note, you are able to **add multiple additional requirements** for each offer*

01.4 Step 4: Target audience

- Select your **target booking audience**
- This can be **specific users, year groups, classes, clubs** or **waiting lists**
    - These groups will be **mirrored from the MIS** as pulled over by sQuid
    - You are also able to **create your own** payment only custom groups
- Leave **Select all users** ticked should you wish to make the offer available to all users
- **Untick** if you would like to target the offer to a **particular group** e.g. Year 1
- You can select **multiple users or groups**, which will appear under **Selected users or groups**
    - When typing the **name of a group**, press **Search** or **Enter** on your keyboard to search
    - When the **user, class or group** you are searching for is displayed, **click on their name** to add a target
    - When you have added all targets, click **Save and proceed**
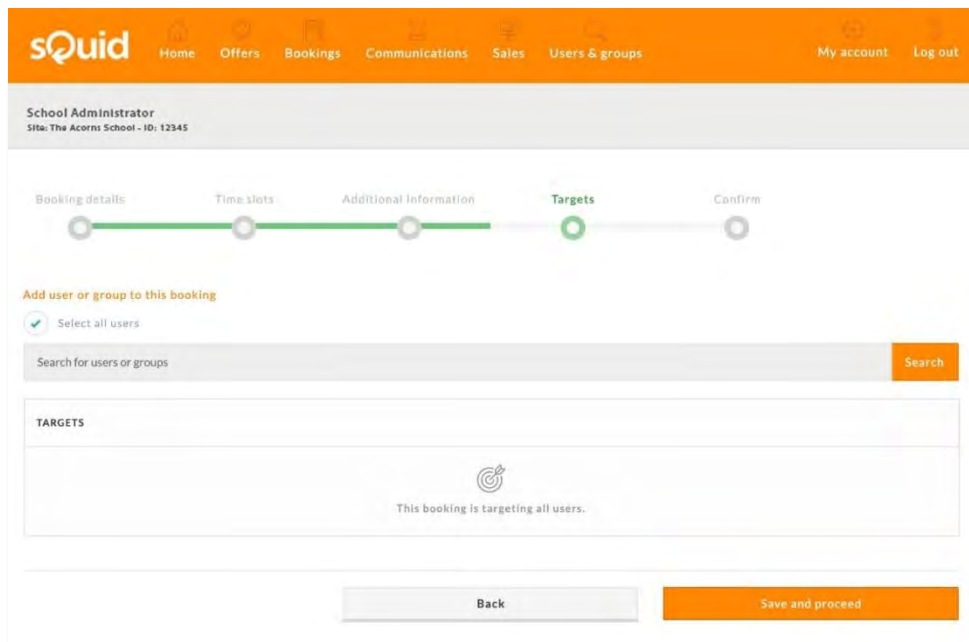
01.5 Step 5: Add a communication to the booking

- If you wish to send a communication with this offer, tick the **Send communication** box

    - If you don't wish to send any communication, leave this **unticked** and then click **Save and proceed**

- Choose **which contact** will receive this message by ticking either **Primary**, **Secondary** or **All MIS contacts**, *or* **sQuid user account registered online**

- Choose whether to **Select from a template** or **create from new**, then choose the **method** in which you wish to send the message (email, text or letter)

- By clicking the green **Click to edit or preview** button under your chosen method, you can **customise the message** you are about to send to parents

- Once finished, click **Save and proceed**

Please note that any communication created **will not be sent until the booking goes live to parents.*

***If you selected **Go live immediately** at the start, the message will send **upon completion of the booking**.*
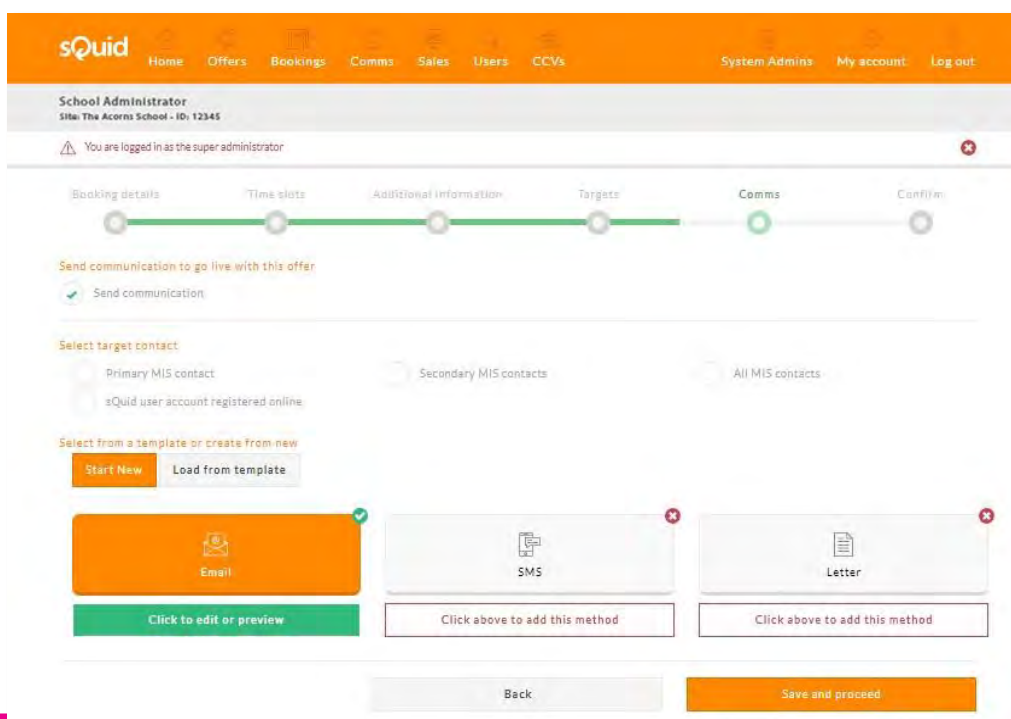
01.6 Step 6: Confirm booking

From here you can **review the booking details** you have entered during the booking creation process, and if required go back through any steps to **amend before publishing**.

- If you have made an **error** at any point, click **Back** until you reach the appropriate step. **Make the correction** and then return to this screen

- If you are happy with all the details, click **Finish**. You will be prompted to **Save the booking to drafts** or to **Publish booking**

- If you click **Save to drafts**, the offer will be saved in your draft bookings

- If you click **Publish booking**, then your booking will be complete

02 View all bookings

In this section you can **view all bookings and make any changes**. You can use the tabs to move between **Live**, **Draft**, **Upcoming**, **Paused** and **Expired** and **Archived** bookings.

You can **filter between booking categories and start and end dates** at the top of the page by clicking **Show filter**. You can hide the filter by clicking **Hide filter**.

02.1 Live bookings tab

If you click on the **action cog** icon next to each booking in the **Live bookings** tab, you can **View booking slots**, **View and map capacities**, **Pause booking** or **Convert to draft** (if no purchases have yet been made) and **Clone booking**.
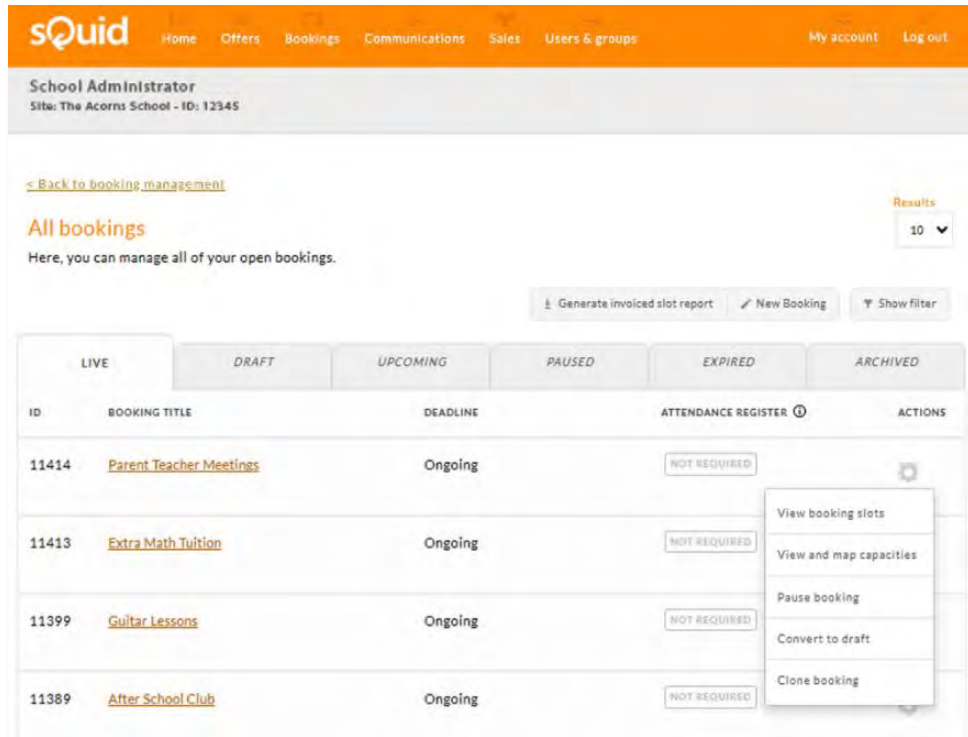
02.1.1 View booking slots

- Allows you to **view the bookings slots**, **view purchased slots** (and from here, **refund slots** either in bulk or individually), **record attendances** (*if this option was selected when the booking was created*), **delete slot** (*if there have been no purchases*), **add a new user** to a slot, **subsidise users** (and **view subsidised users**) and **record on-site purchase** of a slot.

02.1.1.1 View purchases

From here you can:

Refund bookings

Click on the **action cog** next to the purchase to **delete the booking for that user**.

*For more information on how to issue a refund from the *Manage bookings tile*, **please refer to the Refunds section of the sQuid Trips & Offers User Guide.**

Record attendance

- Click **View booking slots**. This will break your booking into **daily sessions**. If bookings have been made for this day, you will see **Pending** in yellow text.

- Click on **Pending** - this is your **daily attendance register**

- Take attendance **digitally** by clicking **Attended** or **Absent** next to each user

- **Export CSV** (button top right) if a **printed copy** is required
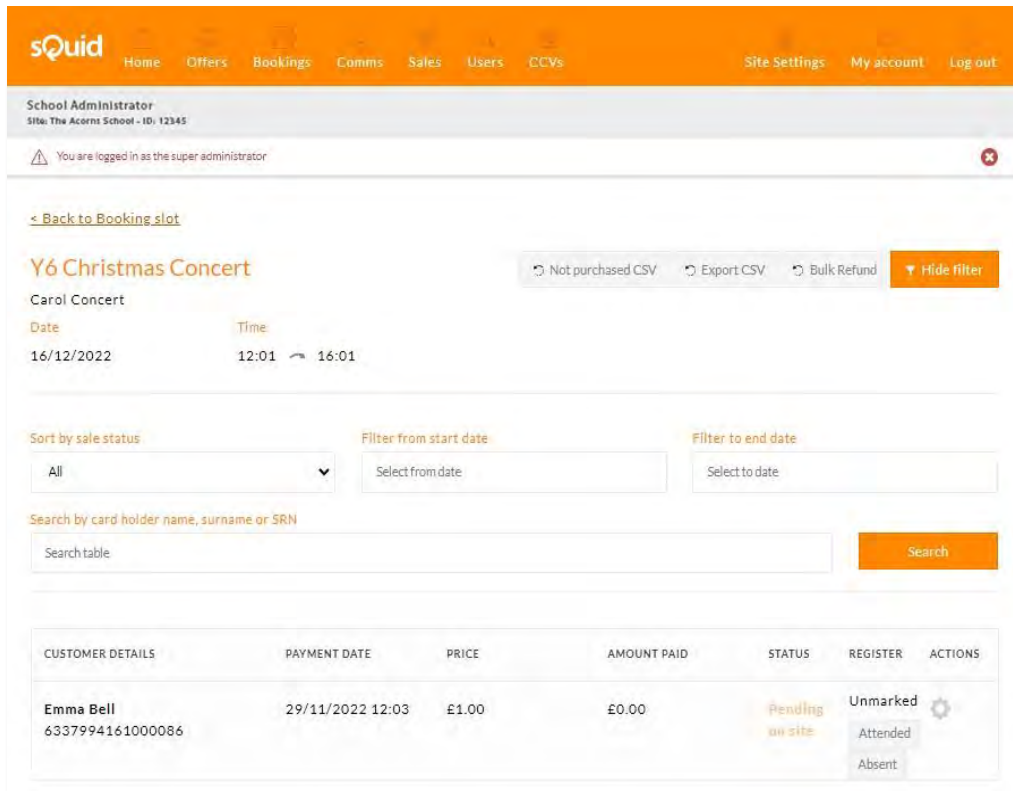
02.1.1.2 Delete a booking slot

*You can only delete a booking slot if none have been sold.

- Click **View booking slots** then click on the **action cog** next to the **relevant booking slot** and select **Delete slot**

- Click **OK** to **confirm** when prompted

See **02.2.1** to **delete an entire booking** (only possible if no bookings have been made).

02.1.1.3 Add a user to an existing slot

In some circumstances, you may have to **add ad-hoc users to a booking slot**. For example, you have an after school club: a parent has not booked and paid for a slot, but due to unforeseen circumstances is unable to collect their child and the child needs to attend the club.

You can add a user or multiple users to an **existing future slot**, **current slot** or **retrospectively to a slot from the last 7 days**.

- Click **View booking slots** then click on the **action cog** next to the **relevant booking slot** (filter if required) and select **Add user to slot**

- Click **Continue** when prompted.

  *Please note that as the customer did not complete the online form any necessary consents or information required will need to be given manually.

  **Additionally, Please note that adding a user in this way will NOT decrease the number of places available.

- Search for the **user to add** - enter their name in the search box, then **click the name when it is displayed** in the search results and when asked to confirm, select **Yes**

- You can continue searching for and adding **multiple users** at this stage

The user/s will now be added to the slot and an **unpaid booking invoice** generated and made available to them.

### 02.1.1.4 Subsidise a user or group

In this step, you can select **individual users or groups** (for example pupils eligible for FSM who might also be eligible for trip discounts, or the children of staff members, who might be eligible for certain discounts) to be **subsidised on the price of an booking**, so the user does not pay the full amount.

- Click **View booking slots** next to the relevant booking

- Click **Subsidise a user or group** from the **action cog** next to the relevant slot

- Search for the user/group by name, then **click on the name** when displayed and click **Select**

- Enter the **New subsidised price** then click **Confirm**

- You then have the option to **Apply to all slots for this booking**: either across all slots with the **same booking slot definition** (those that have been generated using the booking wizard) or across **all slots with the same price**, by **clicking next to the option to tick it**.

- If you **only wish to apply the subsidy to the user selected**, leave both of these options **unticked**.

- You will then see **confirmation that the user has been subsidised successfully**. You can also **View subsidised bookings** or **Subsidise another user** from here, or click **Finish** to complete the operation.
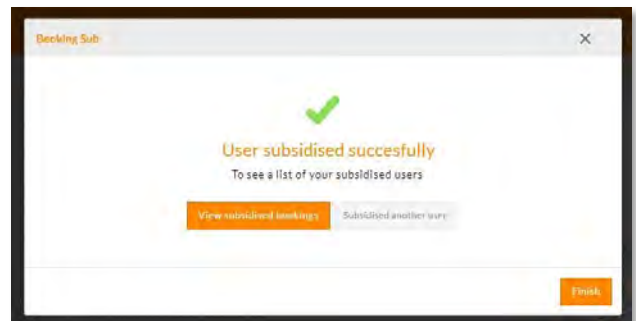
02.1.1.5 On-site purchases

- Allows you to record when a **cash, cheque or card* payment** for a booking needs to be made on-site. Your **system will be updated** so that e.g. there is no possibility of a booking slot being double booked. *The school requires its own card payment device (chip and pin/Zettle/Sumup etc.). These are not supplied by sQuid.*

- Click **View booking slots** and click the **action cog** for the relevant booking. Then click **On-site purchase.**

- Search for the user by name, then **click on the name** when displayed

- Select whether the payment is by **cash, cheque or card**.
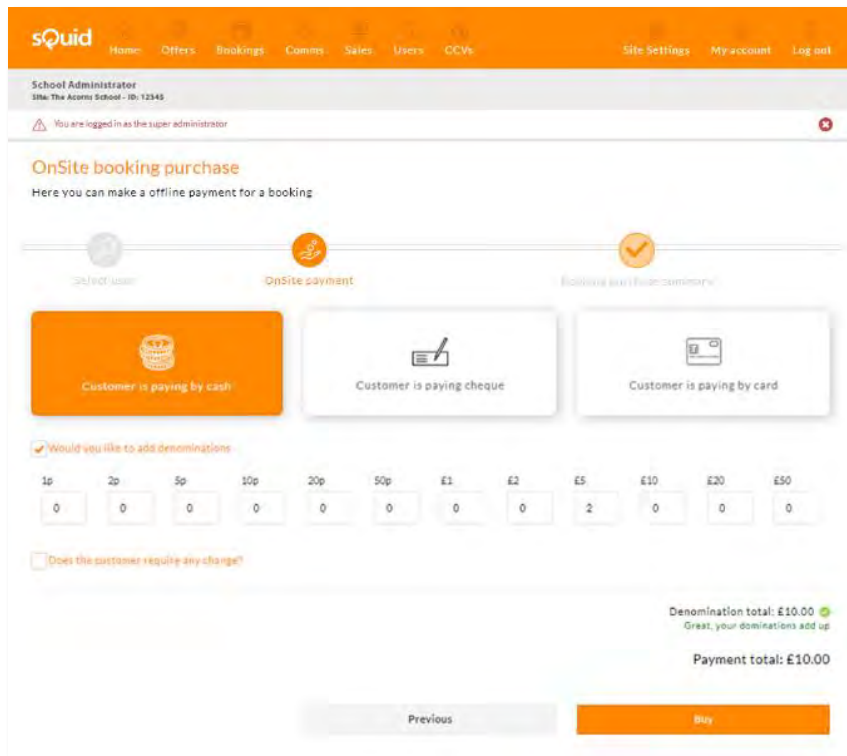
- If by **cash**, you can enter **denominations** used, and whether there will be any **change**

  For example, the customer uses 2 x £5 notes to pay for a £10 offer: tick the **Would you like to add denominations?** box and enter '2' in the box underneath '£5'. If the customer receives some change, then tick **Does the customer require any change?** and enter the denominations in the same way.

- If **cheque or card** payment, click the box to **add a reference number** for the transaction.

- Once the cash, cheque or card amount has been entered, click **Buy**

- You are then taken to an **overview page**, from where you can print a **sales receipt**

- Click **Finish**

02.1.1.6 View subsidised users

- Click here to **view all subsidised users**. NB: all subsidised groups will be broken down into individual users.
- You can also **remove a subsidised** user from here by clicking the bin icon in the **Remove** column, and confirming the removal in the pop-up box that appears, **either for just this one slot, or for all slots in the booking** by ticking the box where indicated

02.1.2 View and map capacities

- Here you can **create or add, and map a capacity to a booking**.
 **SEE SECTION 03 MANAGE BOOKING CAPACITY**

02.1.3 Pause booking

- Allows you to **Pause** the booking. It can be **unpaused** if needed

02.1.4 Convert to draft (if no purchases have been made)

- Allows you to **convert the booking to draft status**, (suspending it), and allows you to **make changes to the booking** or **delete it** (as long as no purchases have yet been made)

02.1.5 Clone booking

- Click on the **action cog** next to the booking you want to clone to **create a new booking based on this one**, which will be saved in the **Draft state**, and entitled **'Clone of…'**, which you will be able to edit before publication
- **Additional requirements** *will be copied*
- Any **communications** associated with the original will *not be copied*
- **Targeted users, groups and subsidised users** *will be copied, only if the Clone Targets checkbox is selected* in the pop-up box
- **Booking slots** associated with this booking *will be copied, only if the Clone Slots checkbox is selected* in the pop-up box. If you will need to **change** the slots for any reason, leave the box **unselected**
- Any **capacities mapped to this booking** (if enabled on your site) *will be copied, only if the Clone Capacity Maps checkbox is selected* in the pop-up box
- Click the orange **Clone** button to proceed. You can now **view, edit and publish** the cloned booking from the **Drafts tab**
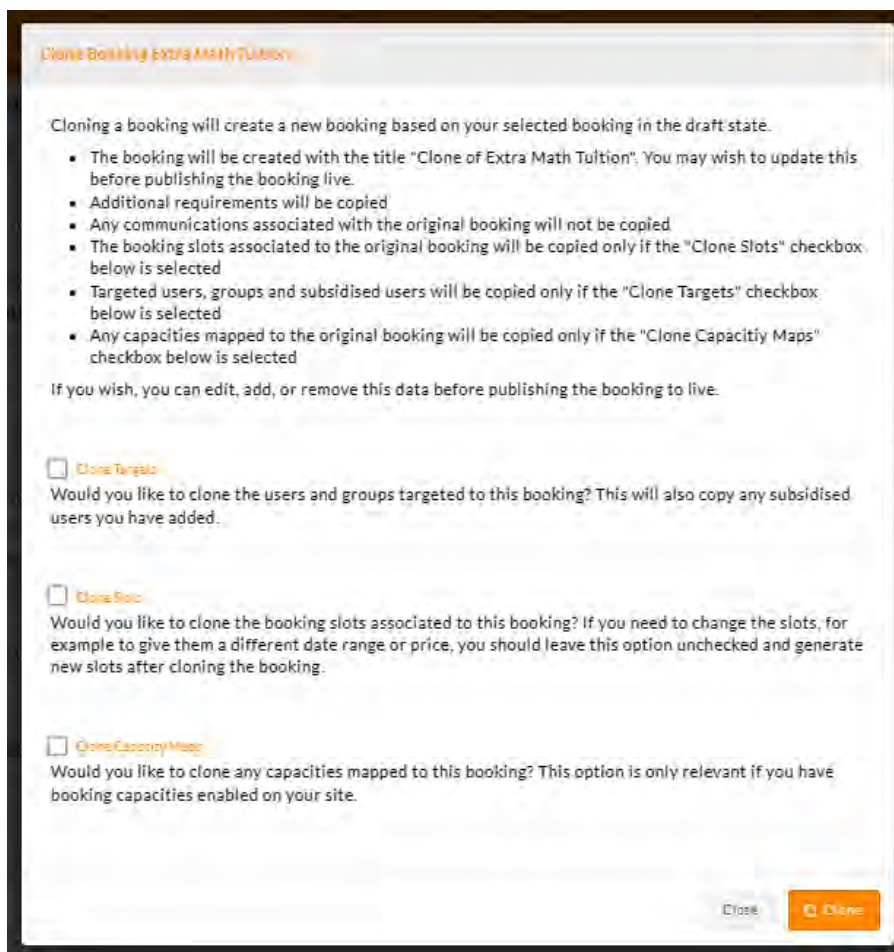
02.2 Draft bookings tab

Draft bookings are bookings you have created but **saved to draft** prior to publishing. Other bookings that have been **cloned** will also appear here.

If you click on the **action cog** icon next to each booking in the **Draft bookings** tab, you can **Edit**, **Publish** or **Delete** the draft booking. You can also **Clone** a draft booking (see **section 02.1.5**).

02.2.1 Deleting a booking

- If you need to **delete an entire booking** that has been published, but prior to any purchases being made, you must first **Convert to draft** (see **section 02.1.3**), then select **Delete booking** from the **action cog** next to the draft booking, and **confirm the deletion** when prompted.

*It is not possible to Convert to draft/Delete a published booking once a purchase has been made.
See **02.1.1.3** to **delete an individual booking slot** (only possible if none have been purchased).

02.3 Upcoming bookings tab

If you click on the **action cog** icon next to each booking in the **Upcoming bookings** tab, you can **View booking slots**, **Edit** or **Delete** the booking. You can also **Clone** an upcoming booking (see **section 02.1.3**).

02.4 Paused bookings tab

If you click on the **action cog** icon next to each booking in the **Paused bookings** tab, you can **Publish** the booking (unpausing it – it will **reappear in the Live tab**, with all the attendant functionality), **View booking slots**, **Clone** a paused booking (see **section 02.1.3**) and **Archive** the booking.

02.5 Expired bookings tab

If you click on the **action cog** icon next to each booking in the **Expired bookings** tab, you can **View booking slots** of the expired booking, **Clone** an expired booking (see **section 02.1.3**), or **Archive** the booking.

02.6 Archived bookings tab

Archived bookings are bookings you have decided are no longer relevant to have **Live**, or stored as **Upcoming**, **Paused** or **Expired offers**.

Archived bookings remain on the system at all times.

If you click on the **action cog** icon next to each booking in the **Archived bookings** tab, you can **view purchases** relating to the booking. (Some bookings may not have an **action cog** available, for instance if there were no purchases recorded for the booking).

03 Manage booking capacity

Capacities can be used to **further limit the quantity available on or across bookings**, beyond the quantity on the slot itself.
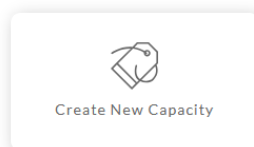
For example:

- **Two bookings happen in the same room, at the same time**, but you don't want the room in use by more than ten people at a time.
- **Some slots start at the same time, but finish at a different time**, and you don't want to sell more than ten in total.
- **Changes in staffing** mean you need to **limit the quantity of a slot** on a specific date to 5.

View and Manage Booking Capacities

Capacities can be used to further limit the quantity available on or across bookings beyond the quantity on the slot itself. For example:

- If you want to give users the choice between two bookings that happen in the same room, but you don't want the room in use by more than ten people at a time.
- If you want to let users choose between slots that start at the same time, but finish at a different time, and you don't want to sell more than ten in total.
- If changes in staffing mean you only want to limit the quantity of a slot on a specific date to 5.

03.1 Creating a new capacity

- Click on the **Manage Booking Capacity** tile
- Click on the **Create New Capacity tile** and enter a **name** for the new capacity where prompted, e.g. 'Music room' or 'School hall'
- You will then be prompted to **configure a schedule** for this capacity. Click the **orange button**, then *see section 3.2.*
- If you prefer to do this **later**, click **No, go back**. Your new capacity will be **listed** underneath the tile

The following functions can be accessed via the **action cog** next to bookings on the **View and Manage Booking Capacities** screen:

03.2 Add schedule

Here you can **create a schedule for your capacity**, e.g. Music room

- Add the **total quantity of spaces available**
- Select whether this is a **one off**, or a **weekly availability**, and **which days** you want to schedule (quick controls are available on the right of the screen toggle between all, weekdays or weekends)
- Add the **start** and **end dates** for your schedule (quick controls are available on the right of the screen to change the week/month/year)
- Add the **start** and **end times** of your schedule (quick controls are available on the right of the screen)
- Click the orange **Add schedule** button. The schedule will appear listed below for you to check. (Click on the **action cog** next to it if you wish to **delete** it at this point).
- If you are **happy to proceed** with adding this schedule to the capacity, click the orange **Generate** button, and again on the pop-up box that will appear, to **confirm**.

Create a schedule for Art studio

You will then be prompted to **Map bookings** (orange button) – *see section 03.4.* You can also **View slots** from here (and then **delete** a slot via the action cog next to it).

03.3 View quantities

Summary of Art studio

- Select **View quantities** from the **action cog** next to your capacity to see quantities **Available, Reserved, Sold** and the **Total**, and the status of the capacity.
- You can **delete** this capacity from the **action cog** next to it.

03.4 View and map bookings

• Select **View and map bookings** from the **action cog** next to your capacity. You will be invited to **Create or add mappings for capacity** *'name of your capacity'*.
• Click the orange **Map a booking to this capacity** button
• Select the current **status** of your booking (**Live, Draft, Paused** or **Expired**) and **search** for your booking by name. Click on the name of the booking that you would like to map to the capacity.

• You will then be able to see your booking (and its status), the capacity, and that the **mapping status** is **Active**. You will now *only be able to book the amount of slots that you have set as your capacity for this booking*.

• Click on the **action cog** next to the booking to **Deactivate** the mapping. This will remove the capacity, which will show as **Inactive**, and you will be able to book an **unlimited** amount of slots. You can **reactivate** by clicking **Activate** in the same way.

03.5 Update name

• Select **Update name** from the **action cog**, and enter the **new name** for your capacity when prompted, and click **Update**, and then **Continue**. You will see that your new name has been applied to this capacity.

03.6 Deactivate

Select **Deactivate** to remove the capacity, which will then show as **Inactive**, and you will be able to book an **unlimited** amount of slots. You can **reactivate** by clicking **Activate** in the same way.

04 Booking categories

In this section you can view a list of all the **category titles** for which bookings have been created, e.g. breakfast club, sports clubs, theatre trips etc.

From here you can **Add new category**, or you can **rename or delete existing categories** next to their name in the list.
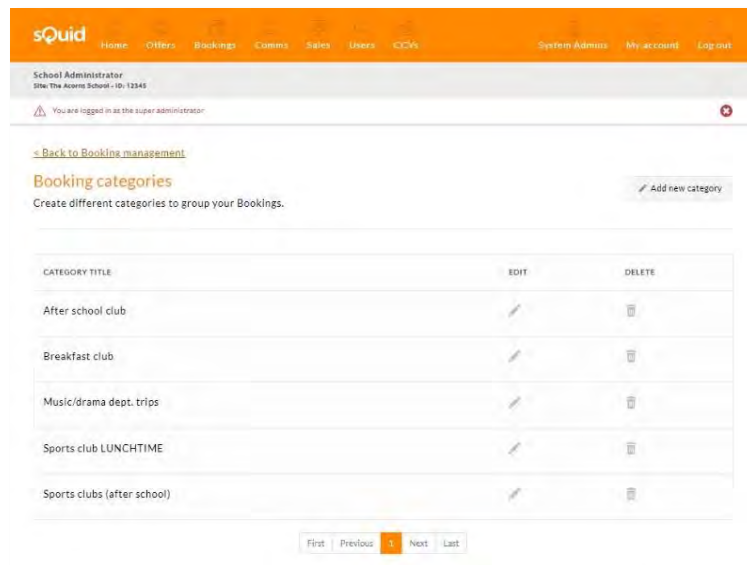

05 Archived bookings

Archiving is a tool to allow you to keep your **Manage bookings** area clean and up-to-date. Once you are finished with a booking and you no longer need to manage it, you can move it to your **Archived bookings** folder. You view this folder by selecting the **Archive bookings** tile.

N.B.: Archiving a booking is an irreversible action.

*Please be aware, bookings are kept here **for reference only**. Once booking is moved here, you are **no longer able to edit details, log payments against it or reuse the information**. It will however remain in the system for reporting and reconciliation purposes.*

- You can **filter** the displayed results by booking categories and start and end dates at the top of the page.
- Click on any listed booking to view the **booking summary**
- To add a booking to the archived bookings, you can click on the **action cog** icon next to any booking in the **View all bookings** area and then click **Archive booking**
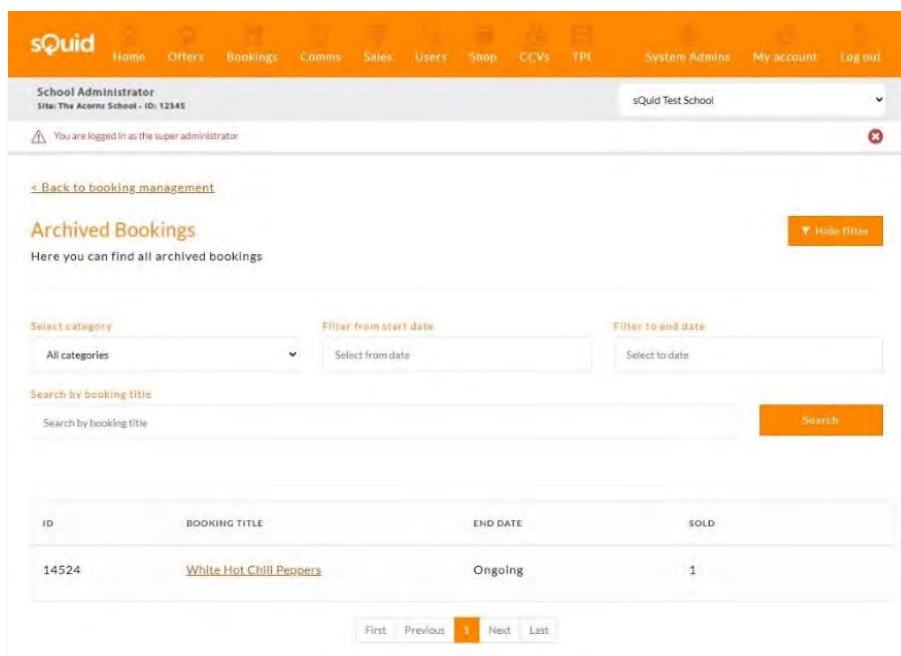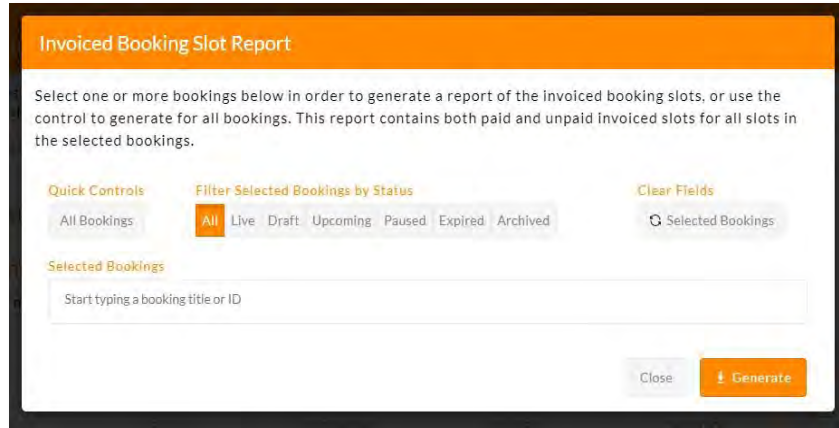
06 Bookings reporting

You can generate reports on either **all bookings**, or **specific bookings**.

06.1 Invoiced slot report for all or multiple bookings

- Click on the **View all bookings** tile
- Click on the **Generate invoiced slot report** button on the right of the screen
- You can choose to report on **all bookings**, or **filter by status**, or **individual booking**
- Click **Generate**

06.2 Reporting options for individual booking slots

- Click on the **View all bookings** tile
- Chose **Live, Paused or Expired bookings** by clicking on the relevant tab
- Click on the **action cog** next to the **specific booking** you wish to report on
- Select **View booking slots** from the drop-down menu
- Click on the **Generate reports** button on the right of the screen. Select from the drop-down menu to:
  - Generate a **revenue report** by date
  - Generate a **booking slot purchase report** by date and status
  - Generate an **invoiced slot report**