Klubfunder

Help Guide

Facility Booker Service

APRIL 4

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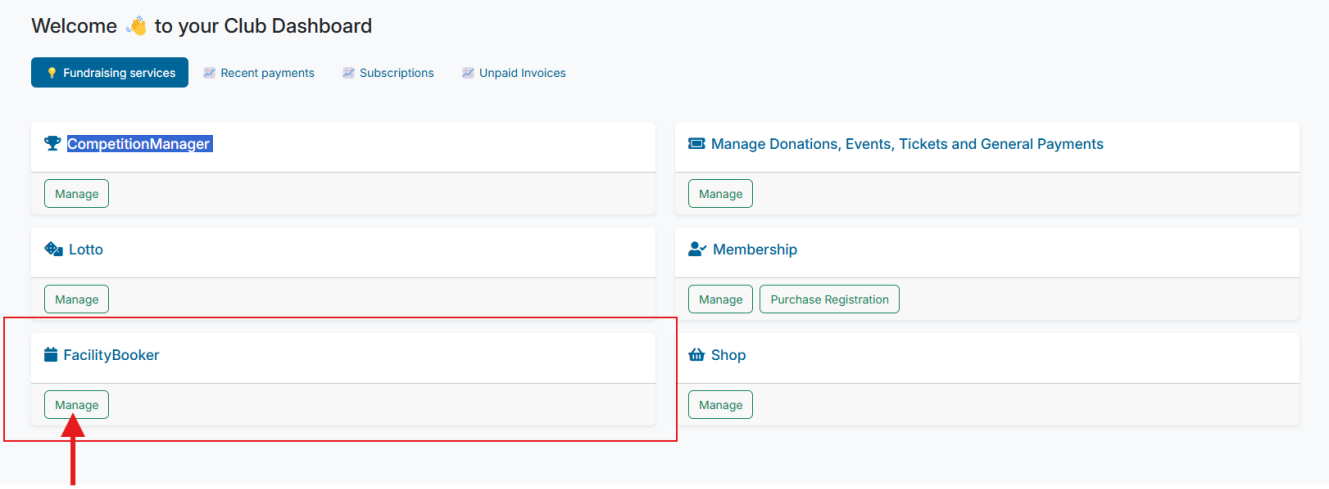
1. Manage Facility Booker

Navigate to your club admin dashboard where you will see the FacilityBooker service as displayed in the screenshot below.

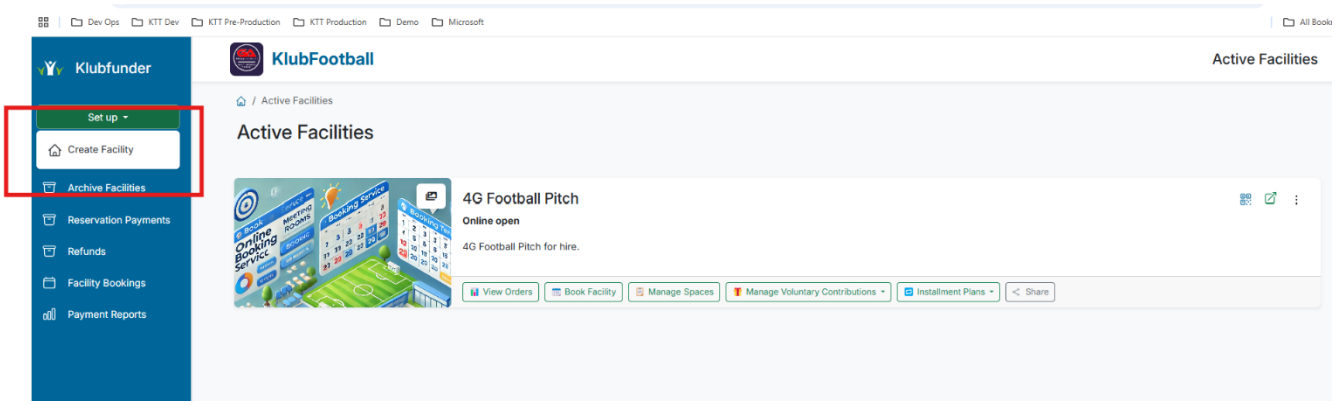


If you click on the **Manage** button as highlighted in the screen shot above this will take you to the next step **Set up Facility**

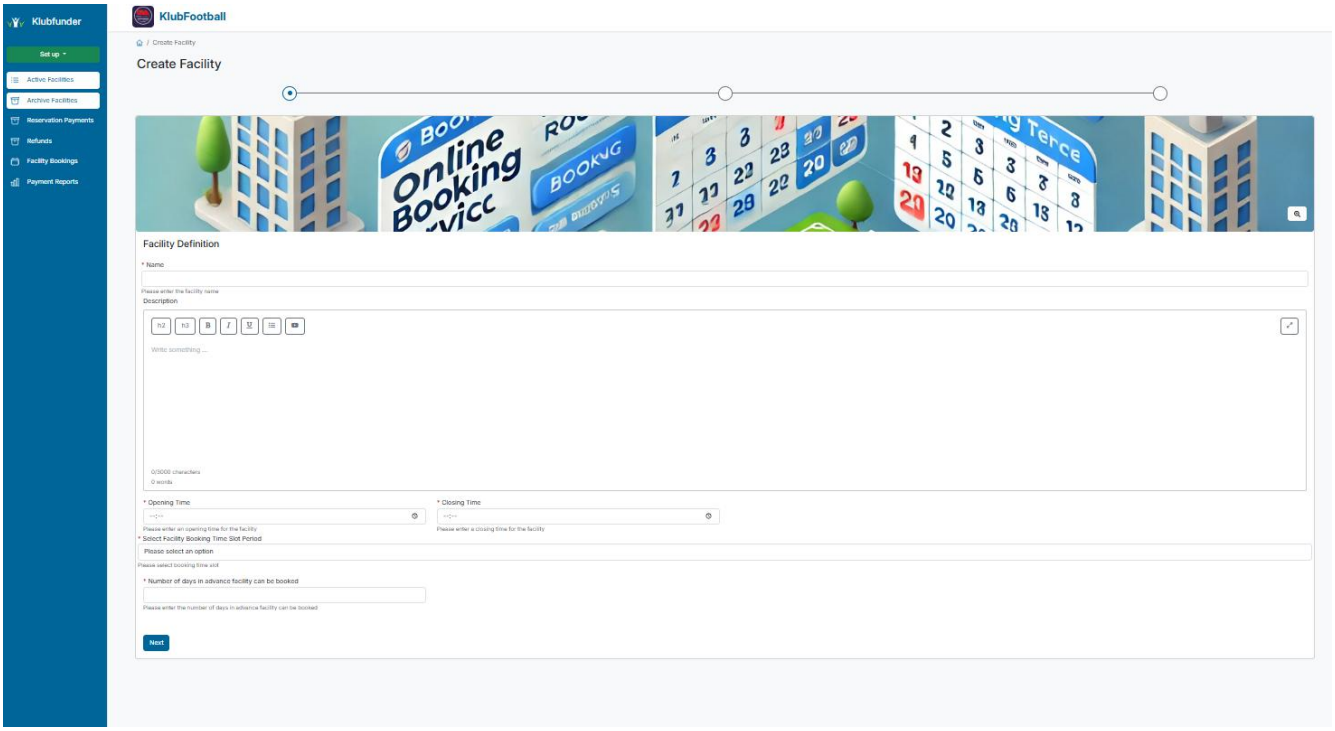
2.Set up Facility

Booking facilities can be set up to take internal bookings only or to take payments online for bookings. The set up process for each case is the same and is described below. below. Once you have got your winning numbers then you can proceed to the set winning numbers step

From the Facility Booker admin screen select the **Create Facility** menu option as illustrated in the screen shot below. This option is available by clicking on the green **Set up** button.

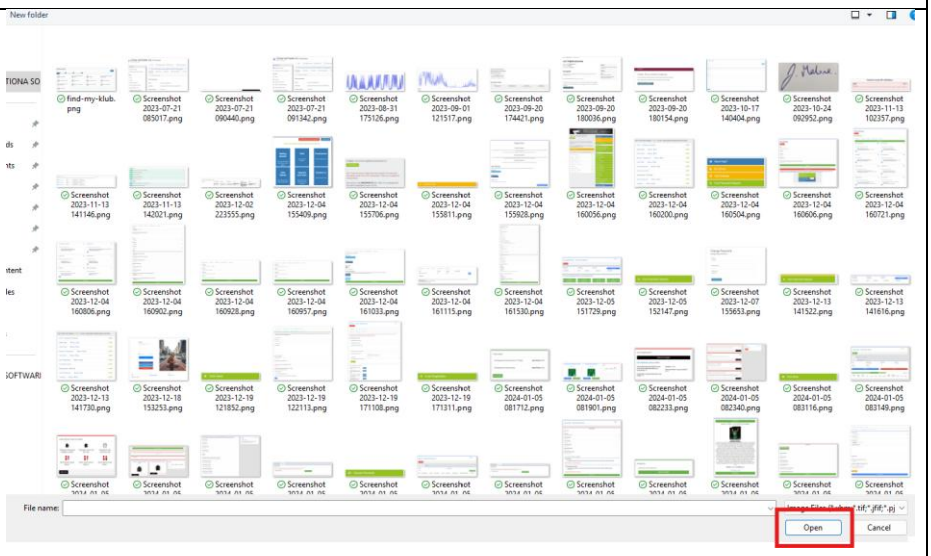


This will then take you into the Create Facility wizard as displayed below.



This screen allows an administrator to perform several actions as detailed below.

Change image associated with the facility. The steps for doing this are as follows.

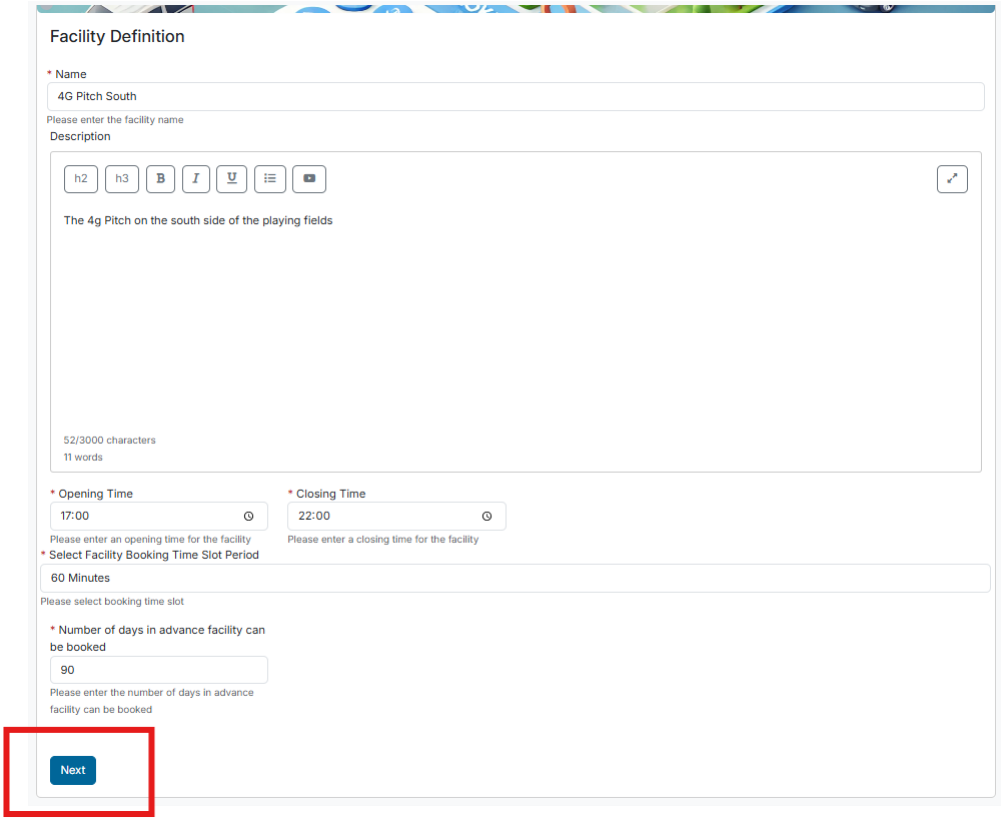
Click on the magnifying galss as highlighted in the screenshot.	
This will allow you to upload an image from your own computer as shown. Once you have selected your image click on the open button as highlighted.	
The new image will replace the original one. To make the change you then click on the upload button highlighted within the red box.	

1. Enter the name of the facility. This will be the name of the facility that users are booking.
2. Enter the description of the facility. This text will be displayed to users when they are doing a booking.
3. Enter the opening and closing time of the facility. This will determine the times that the facility can be booked.
4. Select the time slot period. This is a dropdown that provides the time slot periods that are available for booking. A time slot period is 30 minutes or 60 minutes. If 30 minutes

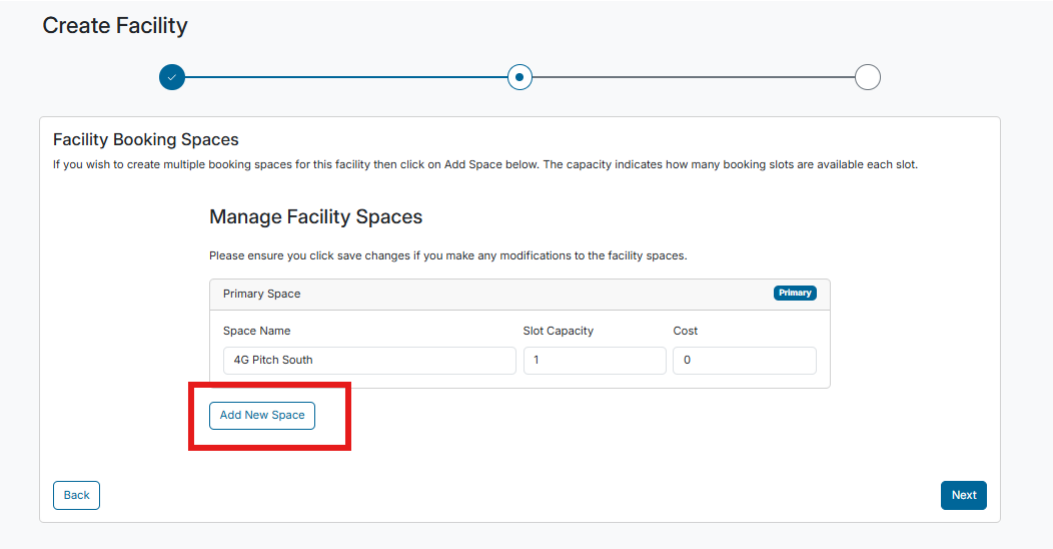
is selected and someone wants to book from 9 am to 11 am then they would book 4 slots. If 60 minutes has been selected then booking from 9 am to 11 am will only require booking 2 slots.

5. Enter the number of days in advance that a facility can be booked for in the future. **This is only applicable to public bookings**. There is no restriction on how far into the future someone booking internally can book for.

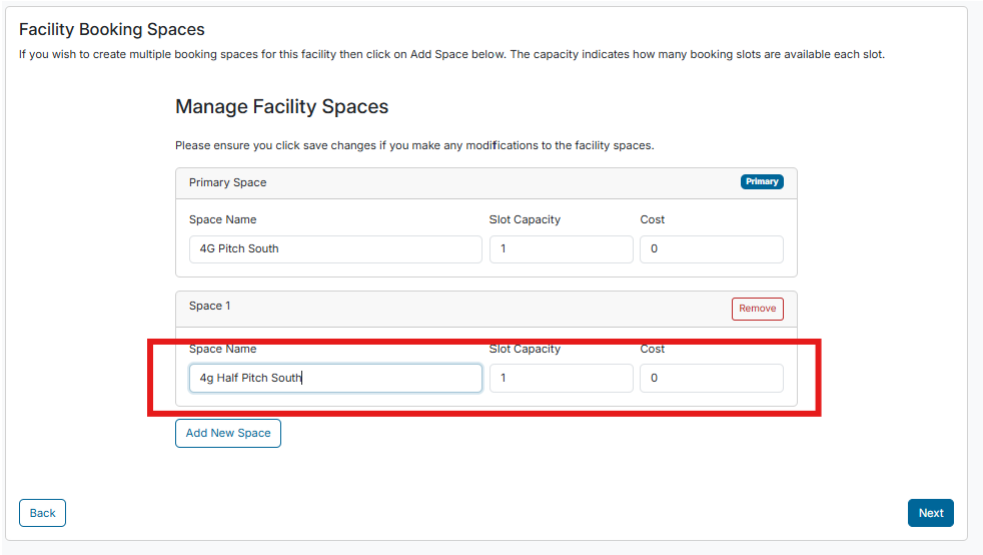
After completing the first page of the wizard then to move to the next stage of the setup click on the **Next** button as highlighted in the display below**.**



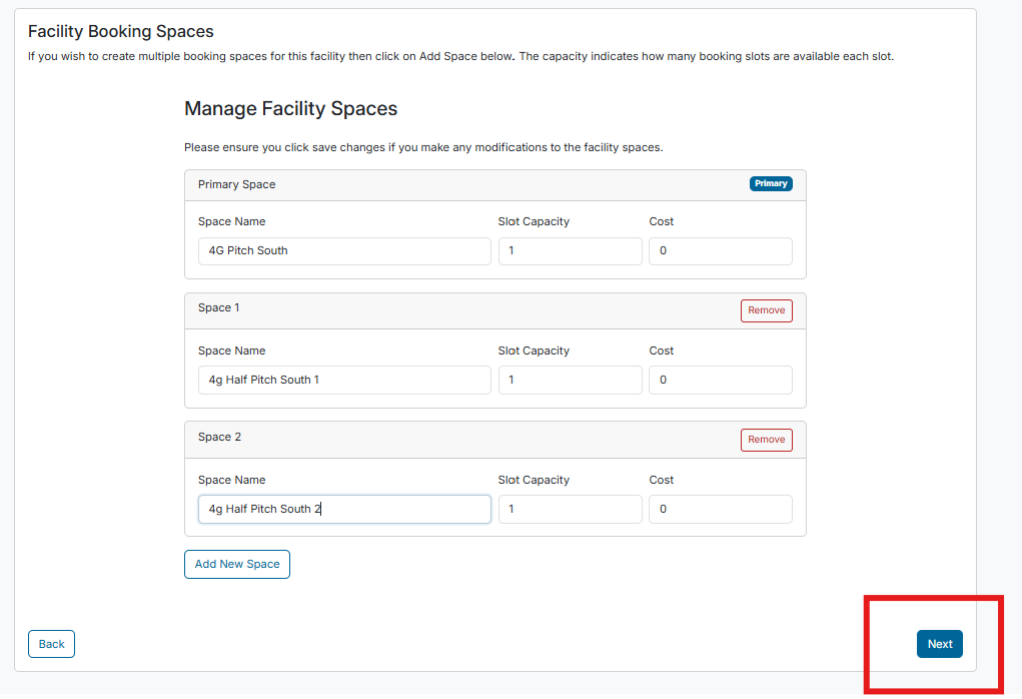
You will then be presented with the second page of the wizard as shown below. This allows you to set up additional spaces for a facility. If we consider a football pitch as a facility then it is likely that a club would like to be able to book different parts of a pitch. In this guide we will set up a pitch that allows users to book the entire pitch or half a pitch. Each facility has to have at least 1 space associated with it and that is referred to as the primary space. So to create the additional half pitch spaces the user would complete the following steps.



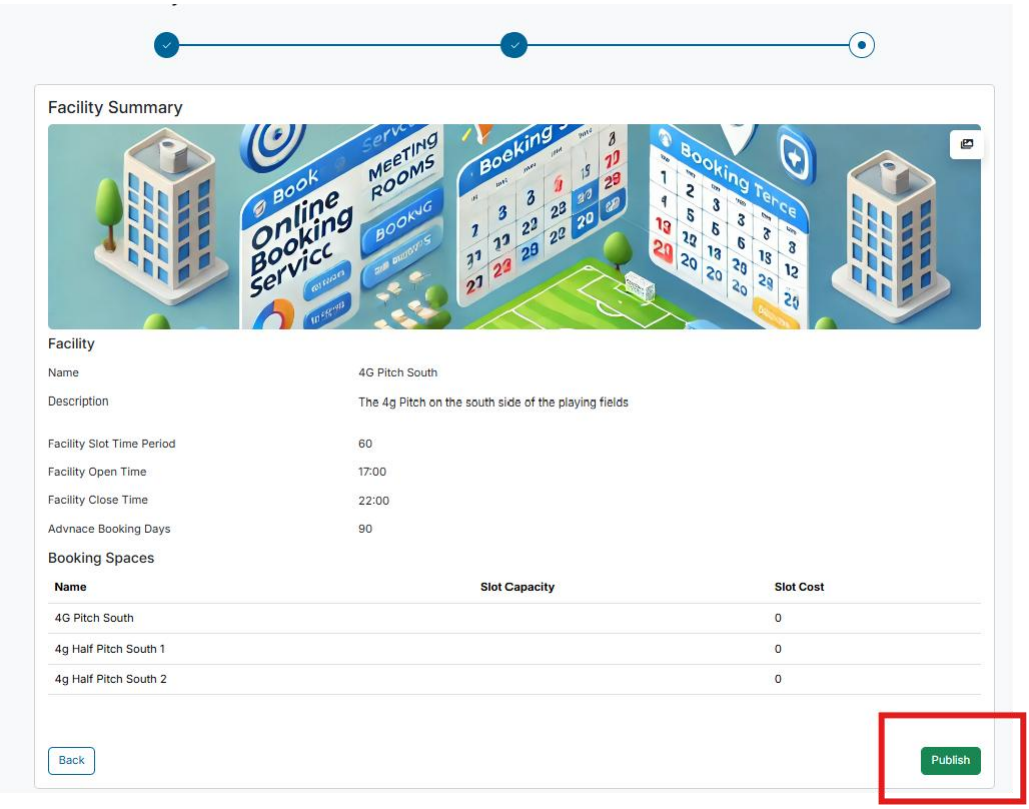
Click on **Add New Space** as highlighted above.



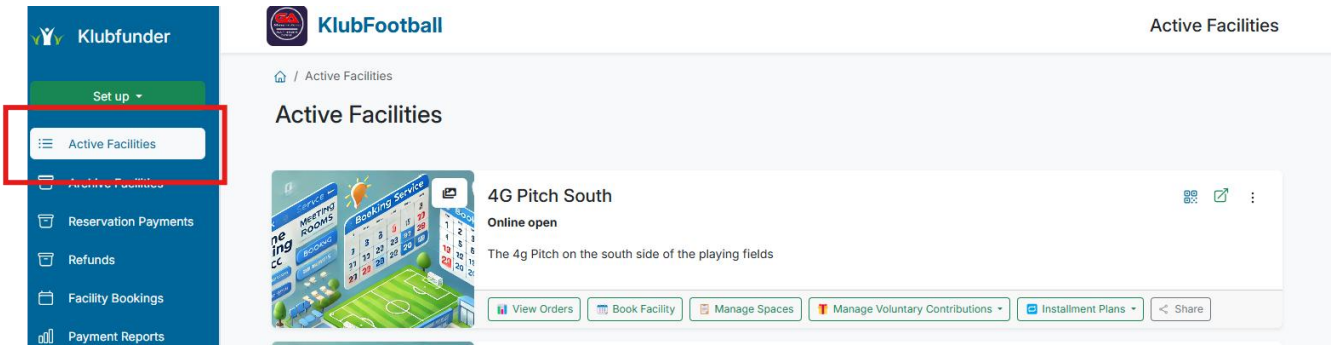
A new space will appear allowing the user to specify the name. The slot capacity should always be left at 1. The cost would only be updated if the facility is being set up for paid external bookings.



Set up the second half pitch space as shown in the display above. The names should be set up so users understand which half of the pitch they will be booking. Once details have been completed then select the **Next** button which will take you to the Facility Summary page displaying the options that you have selected.



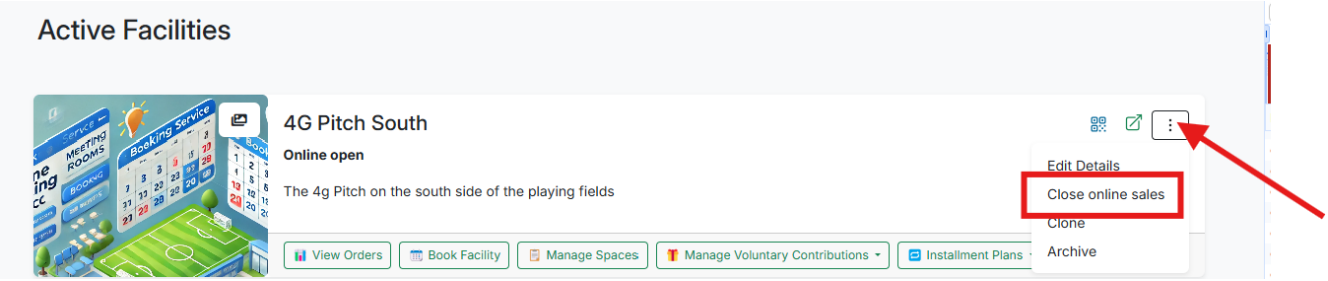
If you wish to change any details use the **Back** button to go back to the other screens and update any details. Once you are happy with the options entered then click publish to create the facility. Once the facility has been published you should be able to see it in your **Active Facilities** dashboard as displayed below.



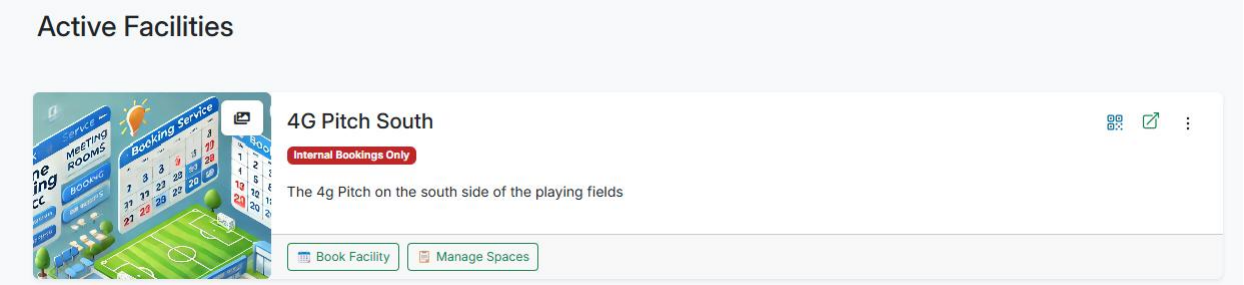
By default the facility will be set up to allow Online Bookings by the public. The next sections describe how the facility can be restricted to internal bookings only.

3. Restrict Facility to Internal Bookings

To set up the facility to only allow internal bookings click on the ellipsis as highlighted by the red arrow below and then select the **Close online sales** option as highlighted by the red box.

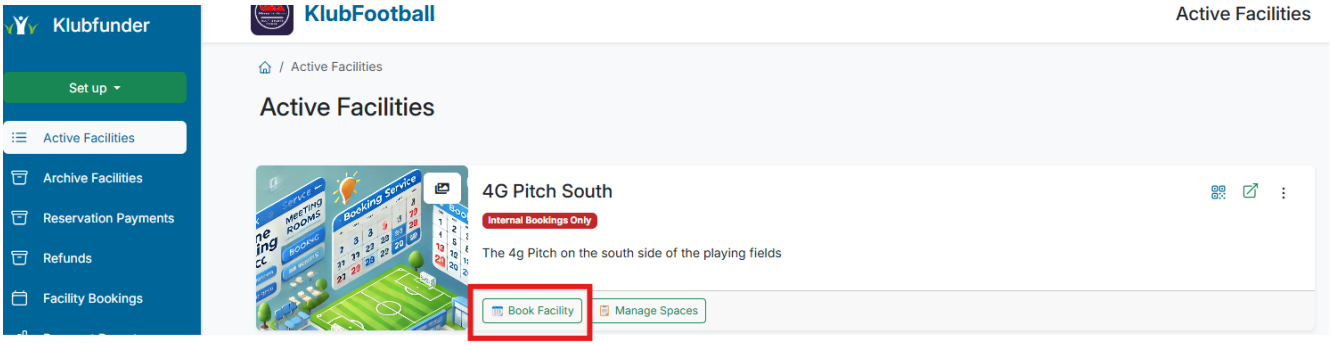


The facility will then appear as below with the **Internal Bookings Only** indicator.

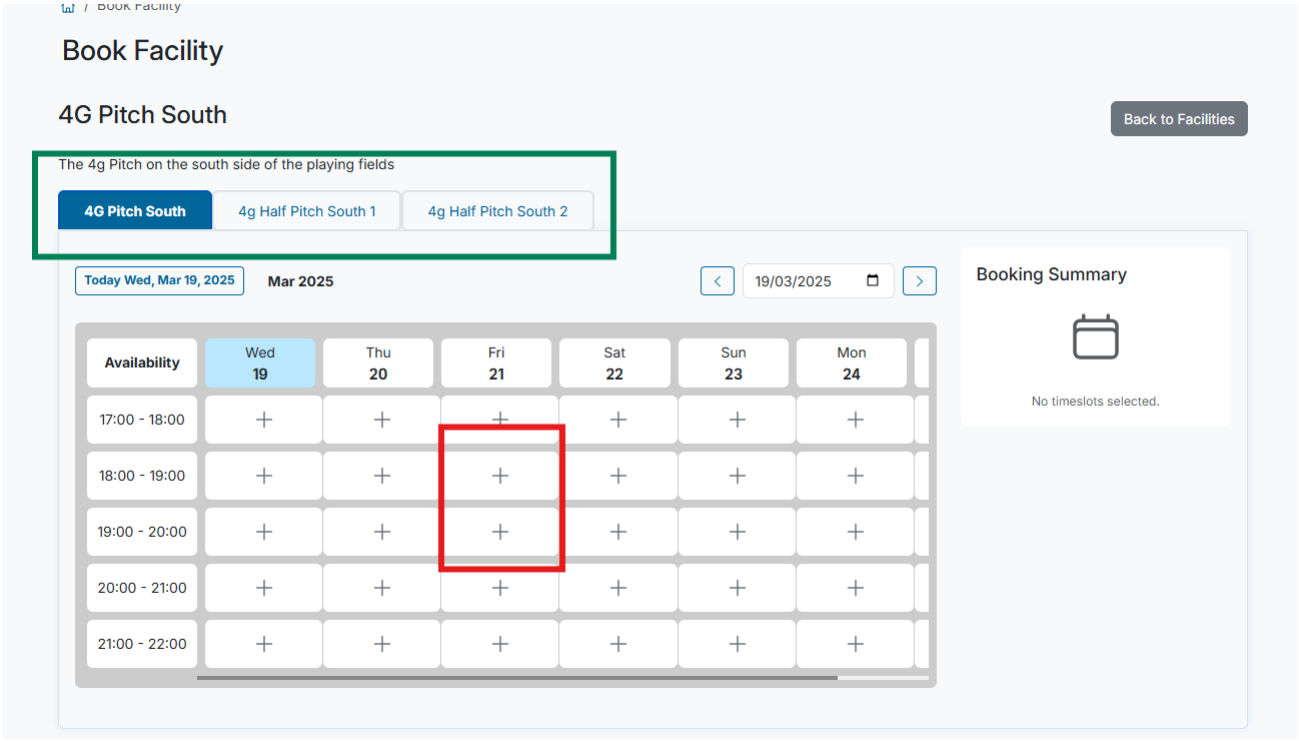


4.Internal Booking

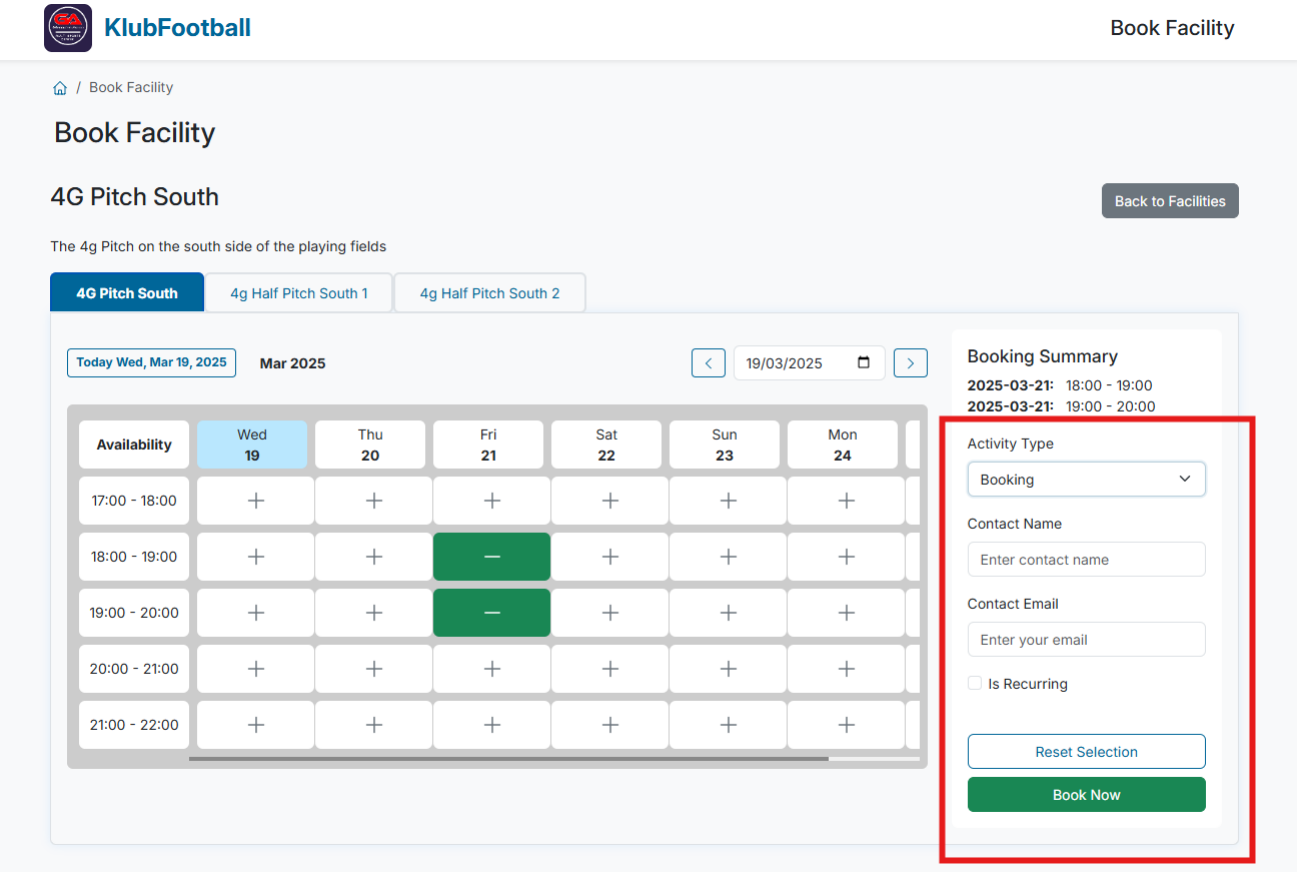
If the facility is set up for **Internal Bookings Only** then only people with access to the internal Facility Booker service can make bookings.



The user would click on the **Book Facility** button as highlighted in the display above and then would be presented with the facility availability screen which would allow them to book the facility as shown in the screen below.



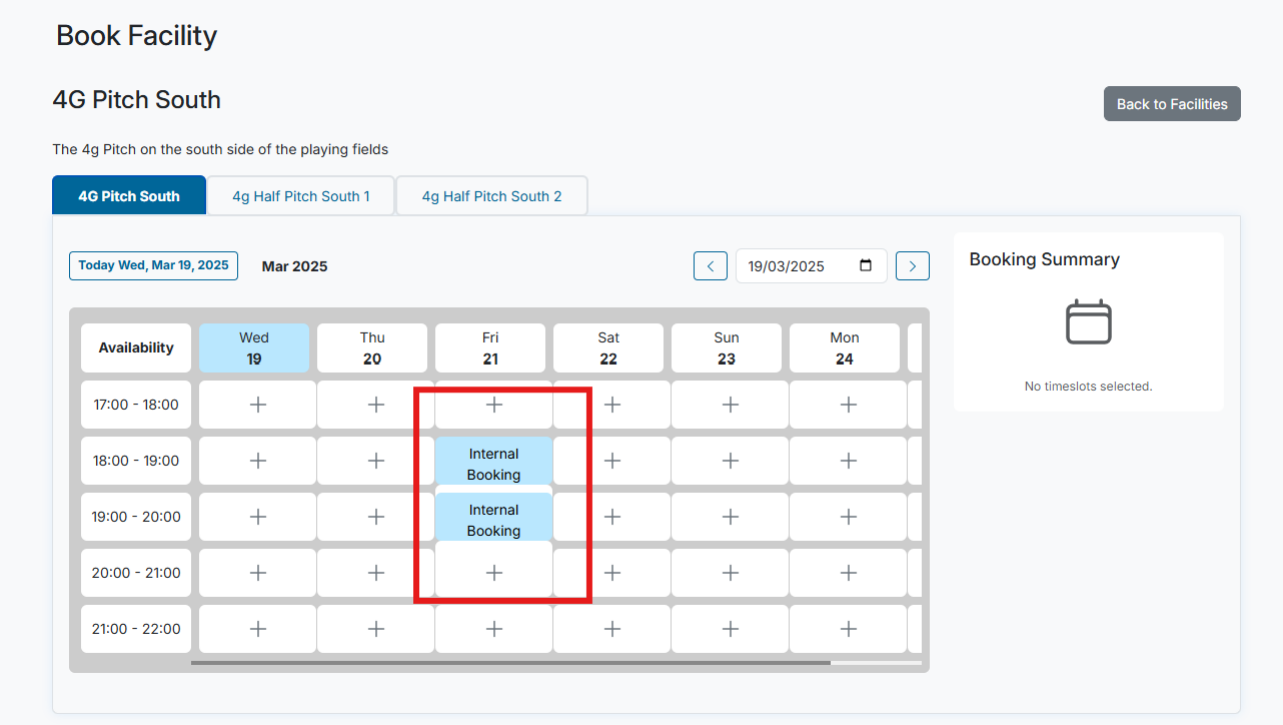
The green box shows the facility spaces that are available for booking, in this guide we will book the full pitch. The period highlighted by the red box indicates the slots that the user will be booking 2 60 minutes slots 18:00-19:00 and 19:00 20:00. The user would click on the + symbol for each time slot they wish to book.



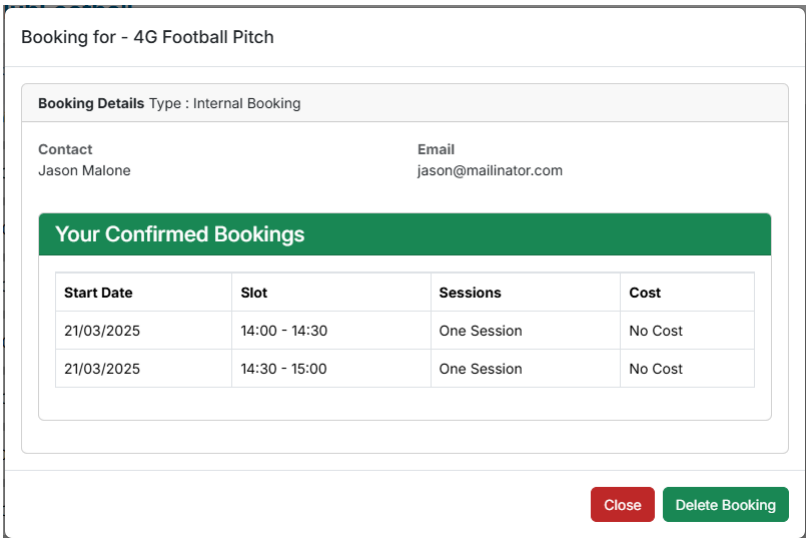
There are several options within the booking summary information box:

- **Activity Type** – this is a select dropdown with 3 options of Unavailable,Booking and Customer Reservation. When booking slots internally then the **Booking** option should be selected.
- **Contact Name** - The contact name of the person who the booking is for.
- **Contact Email** - The contact email of the person who the booking is for.
- **Is Recurring** – when clicked a calendar will appear allowing the user to select a date into the future. If this option is selected then all of the Friday slots between 18:00 and 20:00 will be booked until the chosen future date.

Once the options have been selected then the user will click the **Book Now** button to make their booking. The two slots will then be displayed as Internal Bookings on the calendar meaning they are now no longer available for any other bookings.



When the term **internal bookings** appears on the calendar slots an administrator can click on the box to see the details of the booking as shown below.

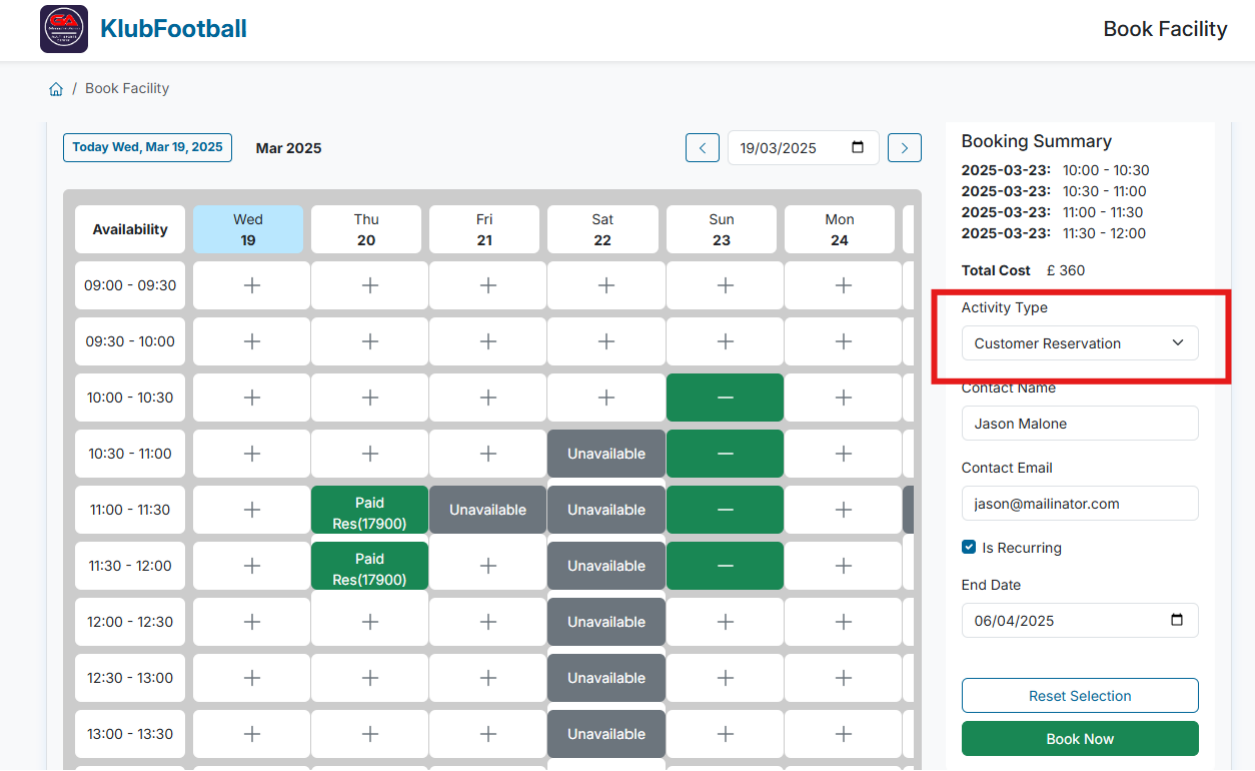


From this view it is also possible for the administrator to delete the booking.

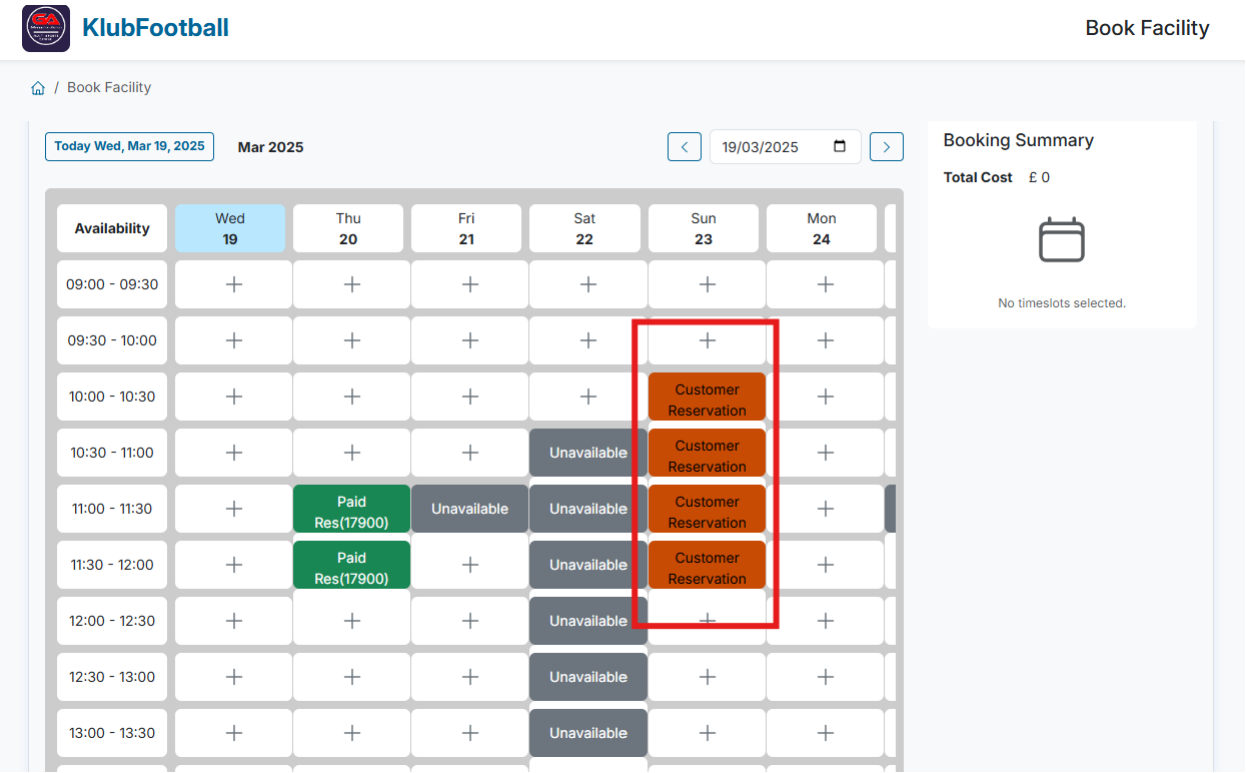
5. Customer Reservation Booking

There may be occasions when a facility is available for the public to book online, but to ensure that regular booking customers get first refusal for their preferred timeslots the administrator can set up **customer reservations**.

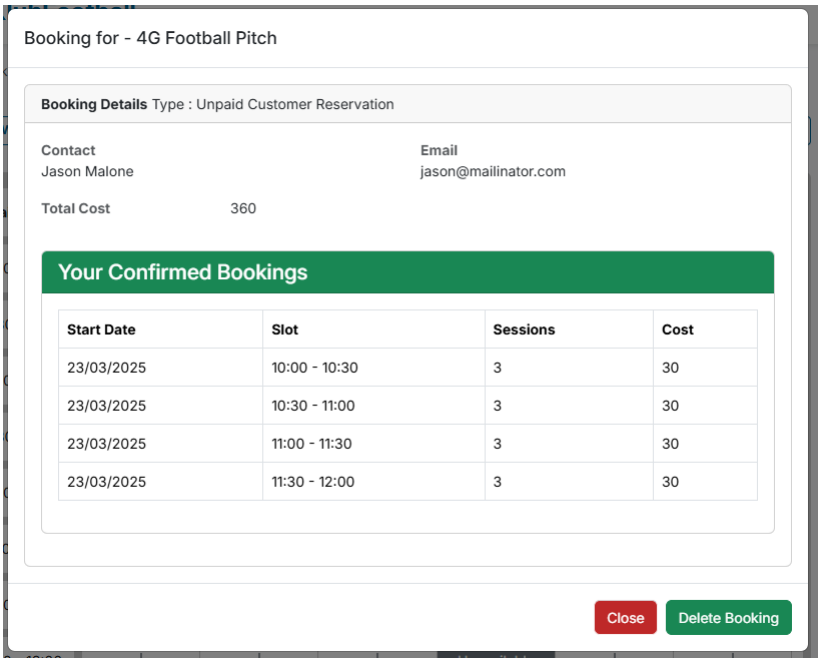
Setting up a customer reservation is the same process as making an internal booking the only difference is that instead of picking **Booking** in the **Activity Type** dropdown the administrator would choose the Customer Reservation option, as in the display below.



As can also be seen in the display the total cost of the booking is also displayed as this will be the cost the customer will have to pay should they wish to proceed with the booking. Once the **Book Now** button has been clicked then the slots will be reserved for the customer and will be displayed in orange on the calendar as shown below.



Again the administrator can click on any of the boxes to see the details of the **Customer Reservation.**



After completing this step a **Reservation Payment** will have been created which is available for the Administrator to review before issuing. The Reservation Payment appears in the

Reservation payments view which is accessed by clicking on the Reservation Payments menu option as highlighted by the red box in the display below.

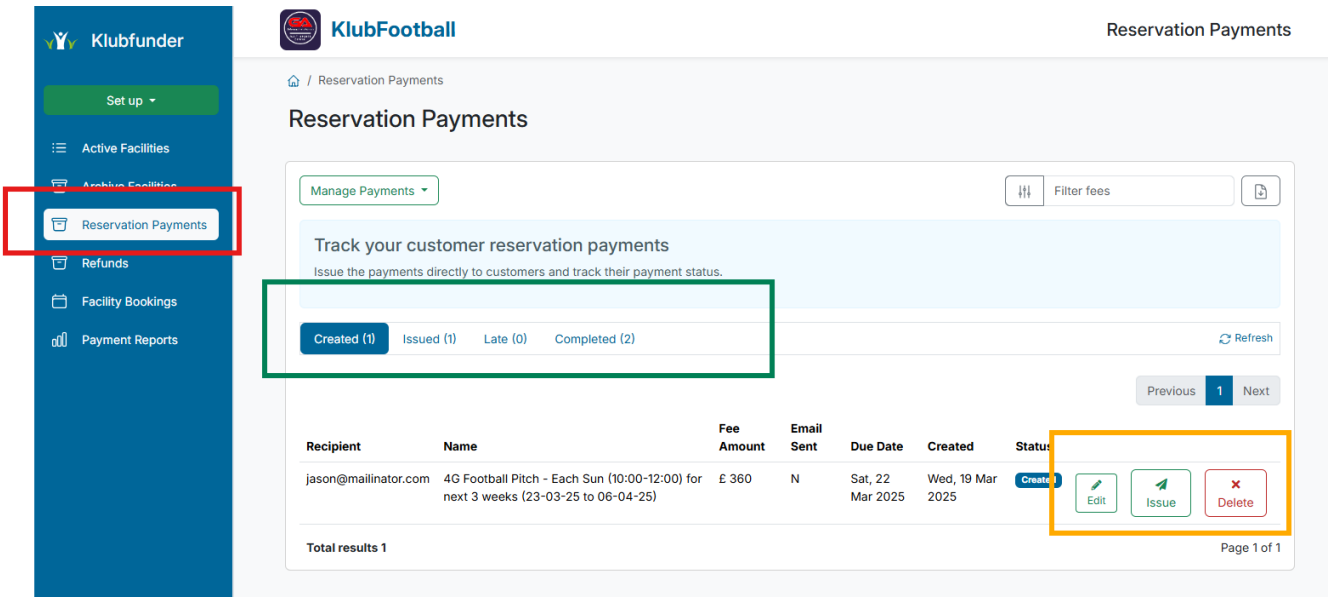


Figure 1 Reservation Payments Dashboard

Within the reservation payments view there are a number of ***payment states*** as highlighted by the green box and also a number of actions that can be performed as highlighted by the yellow box.

Payment States

There are 4 payment states Created, Issued , Late and Completed.

Created

A customer reservation request appears in the Created tab after a Customer Reservation booking has been completed. When the request is in the Created state it can be edited by the administrator. Editing the payment is done by clicking on the **Edit** button shown in the orange box in the screen above.

Once clicked the Update Payment screen will be displayed which allows the user to change details of the payment. All options are shown in the screen shot below.

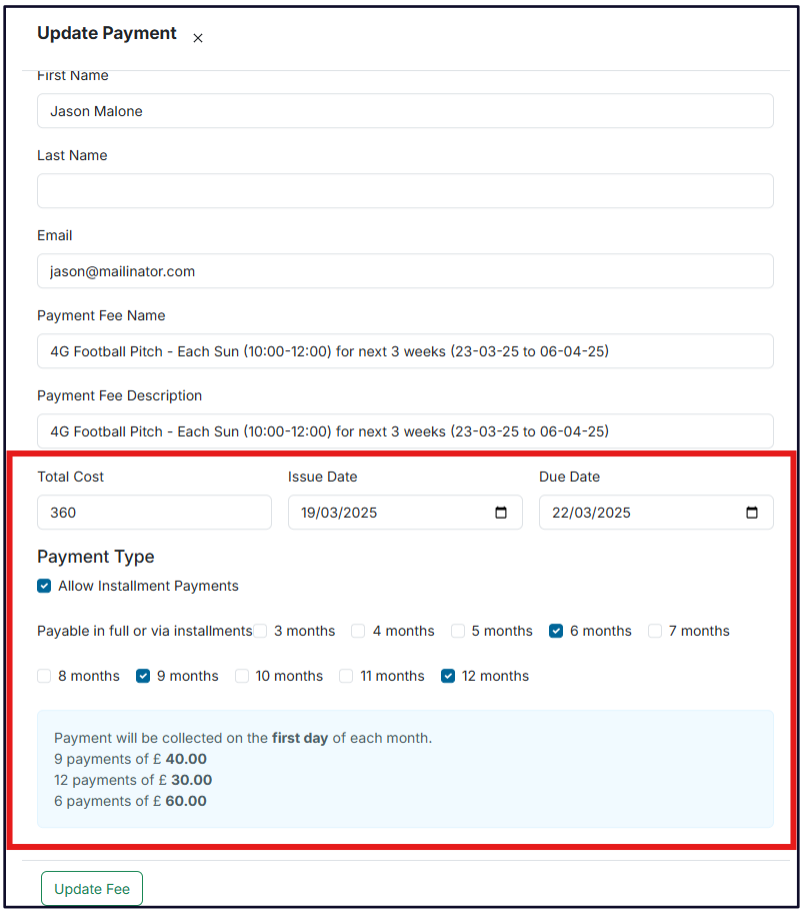


Figure 2 Update Payment

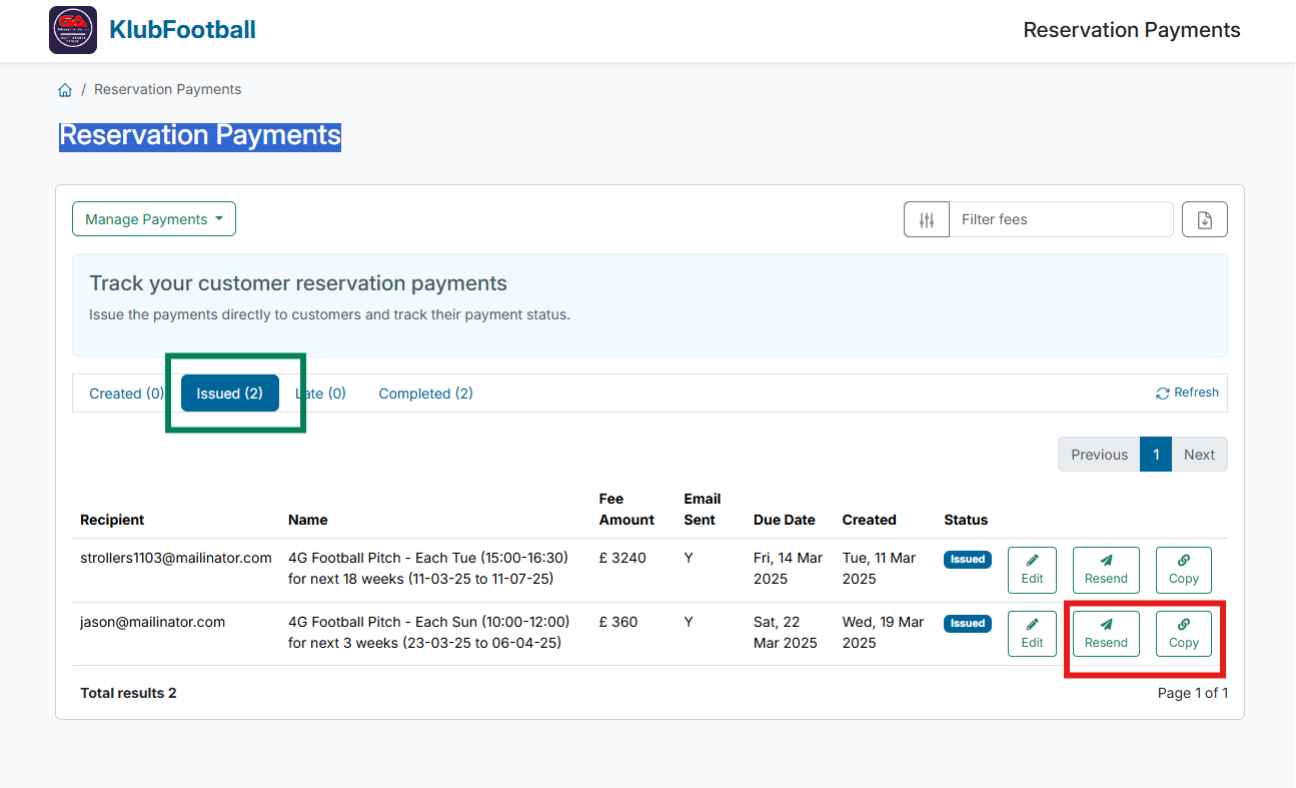
Whilst all of the details in the screen are editable it is really the payment details that are likely to be modified. Specifically the number of installments that the customer can pay over or even the amount the customer is charged can be modified if required.

Once the administrator is happy they can then issue the payment request to the recipient by clicking on the **Issue** button as highlighted in the orange box on the reservation payments screen above.

Issued

The issued Customer Reservation payments are accessed by clicking on the **Issued** tab as highlighted by the green box in the display below. A customer reservation payment in the issued state means that it has been sent to the recipients' email address. **NOTE: These emails can sometimes be in the recipients junk email folder or equivalent. If a recipient says that they haven't received the email then ask them to check those folders.**

From the **Issued** tab it is also possible to resend the email request to the recipient and it is also possible to copy the link and send the email directly yourself. Both of these actions are highlighted in the red box in the screen below.

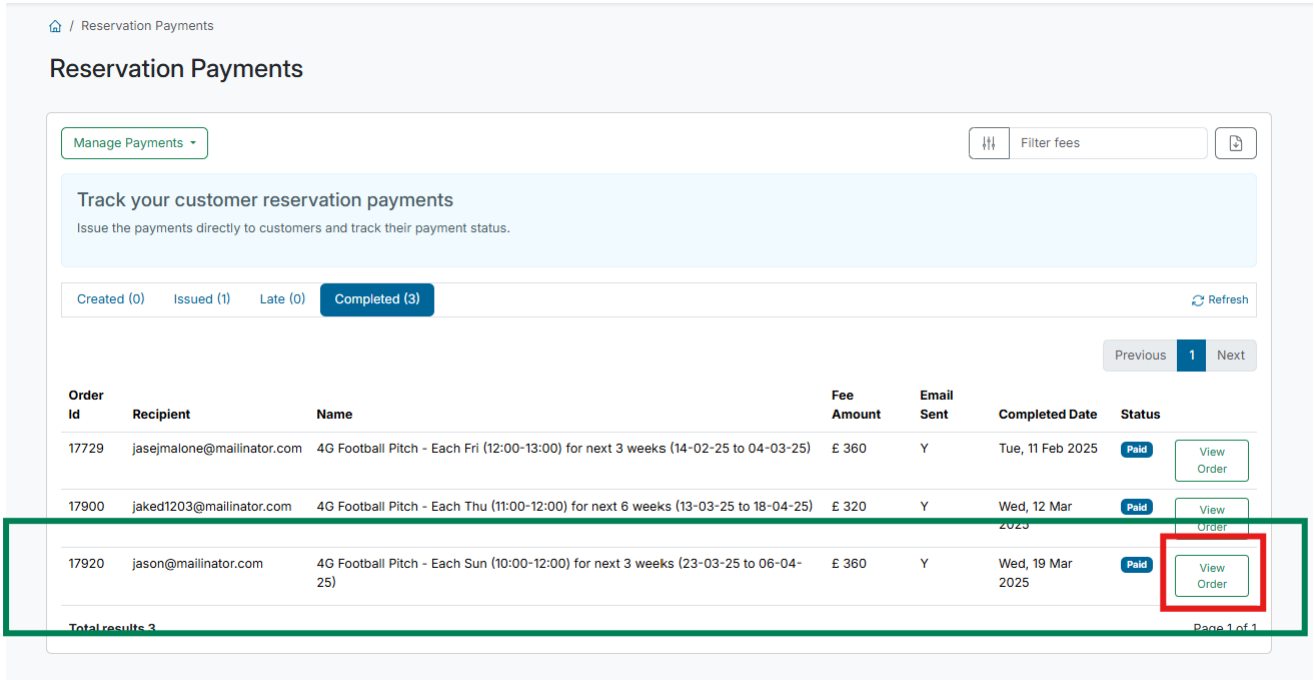


Late

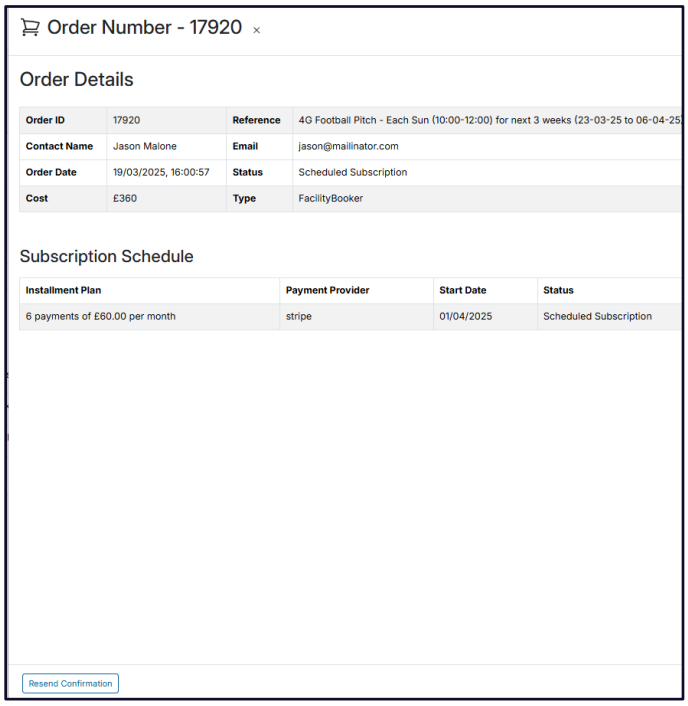
A customer reservation payment will be in the late state when it has not been paid and the date is past the due date that was set in **Figure 2 : Update Payment** screen (Highlighted in the red box). Requests in the late tab have the same actions as in the issued tab - resend and copy.

Completed

Once a customer has completed their payment then the payment request will appear in the completed tab as shown below.

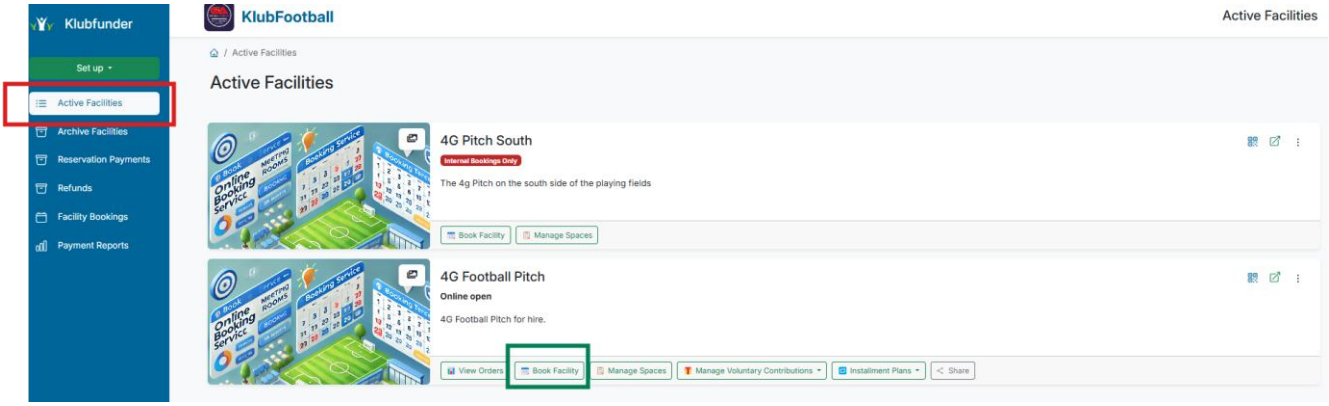


This shows that the order has been paid for and the administrator can see the order details by clicking on **View Order** as highlighted in the red box in the display above, the details appear below.

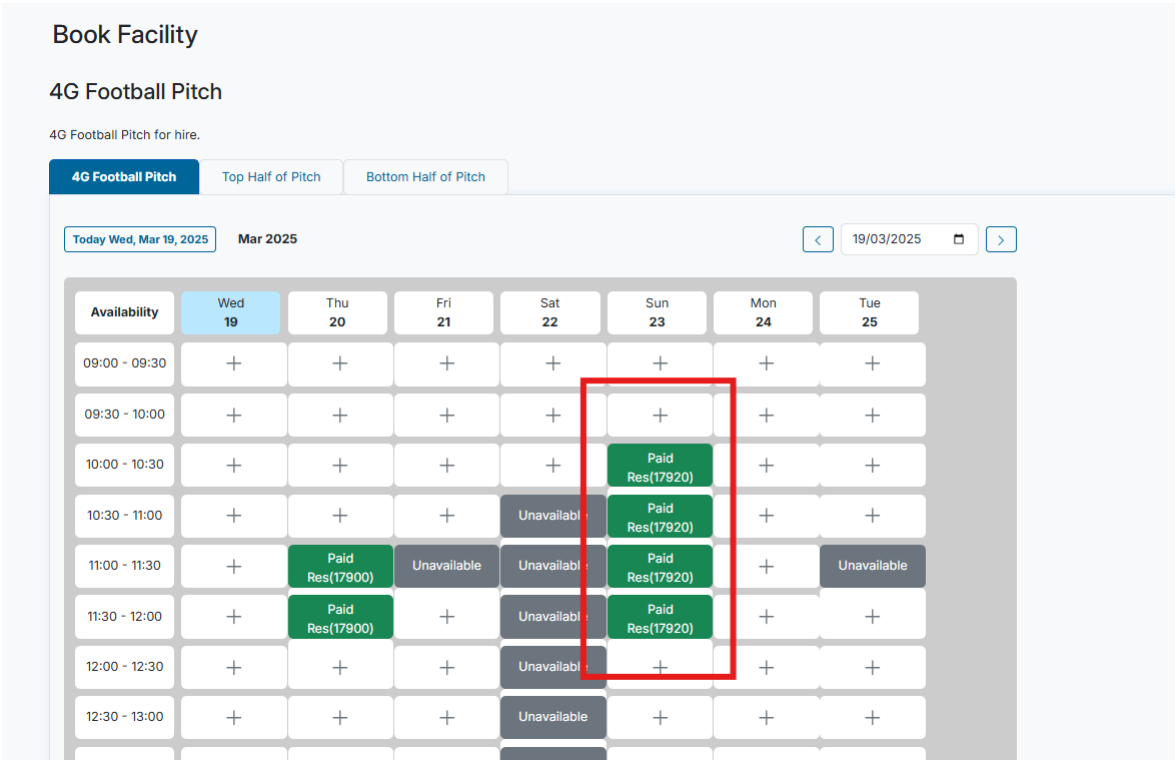


6. Book Facility View

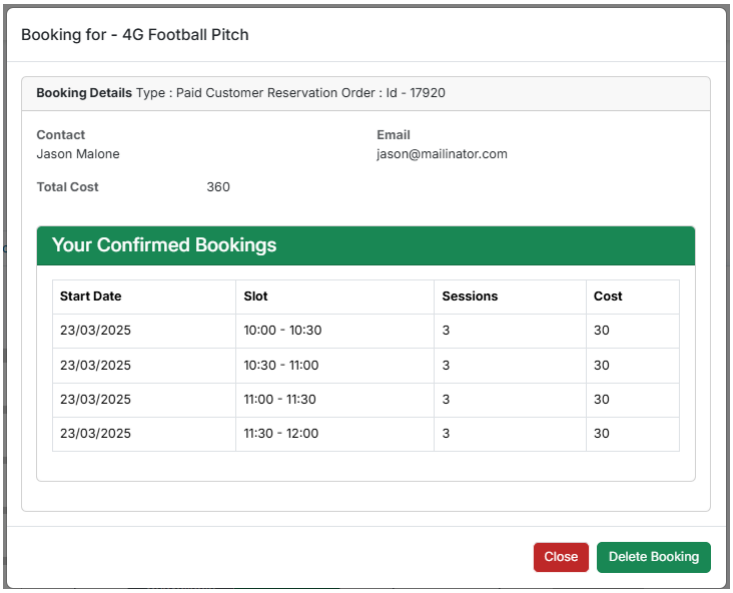
The customer reservation will now appear as Paid on the facility calendar view. To display this the administrator would navigate to the facility first. Select the **Active Facilities** menu option as highlighted in the red box below.



Then the administrator would select the **Book Facility** button, highlighted in the green box above to show the calendar view as below.



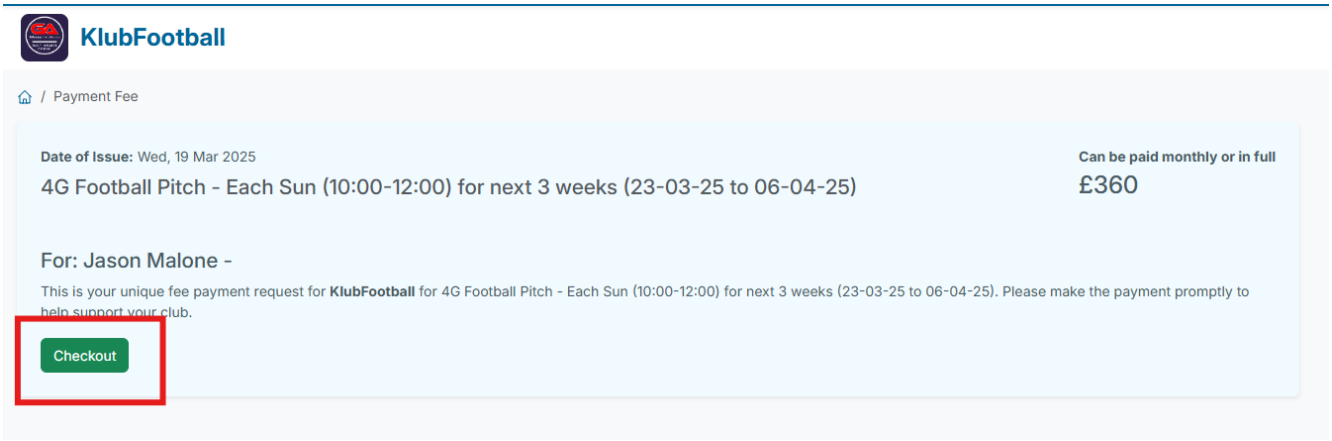
The administrator can then view the details of the Paid customer reservation by clicking on one of the boxes to display the booking details as below.



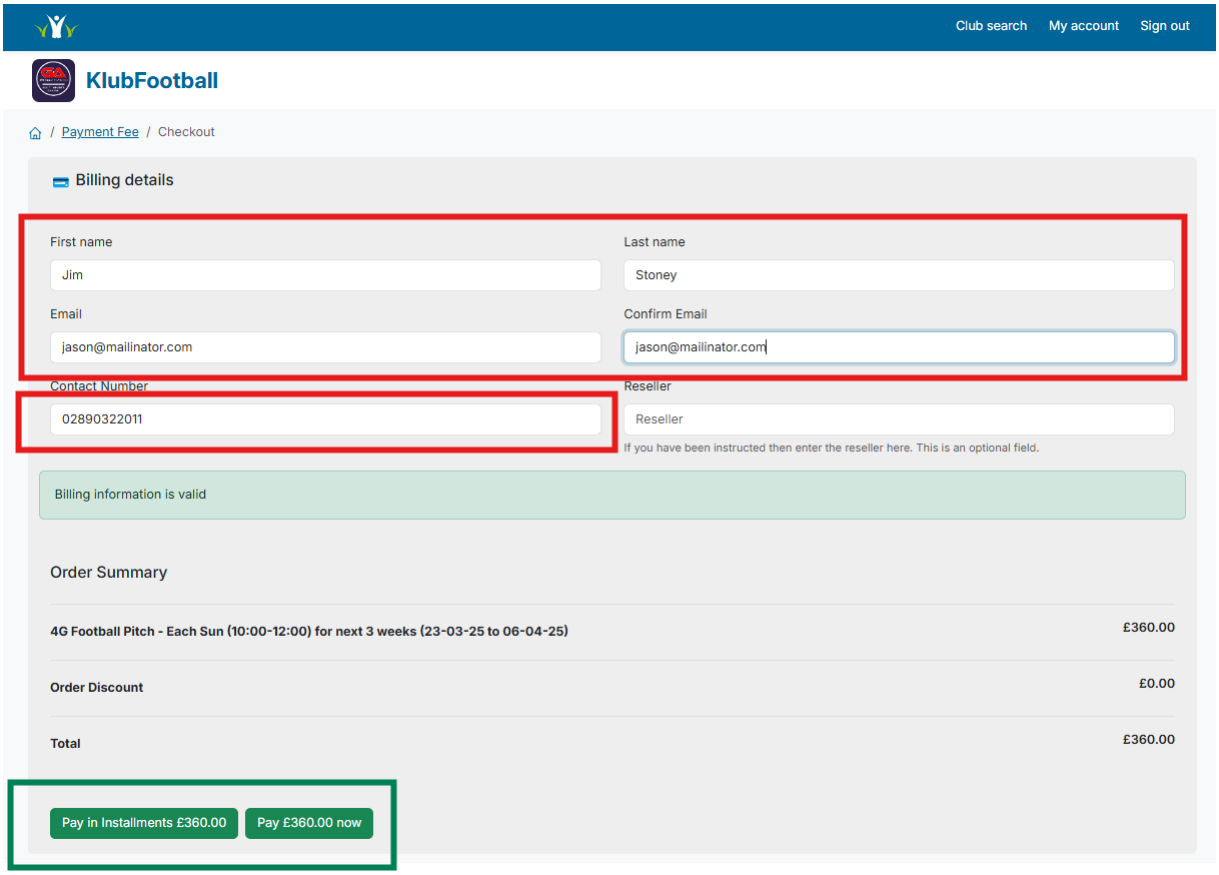
7. Customer Payment Flow

This is the email that the customer will receive when their payment request has been issued to them.

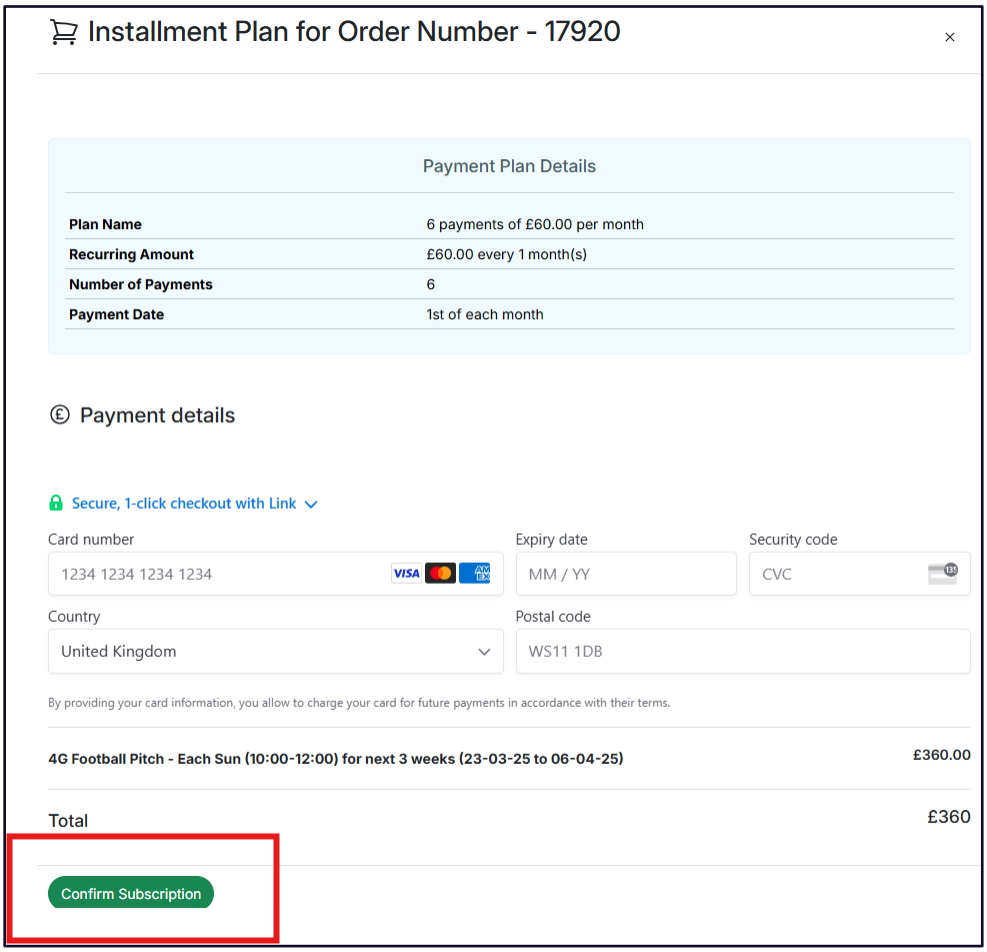
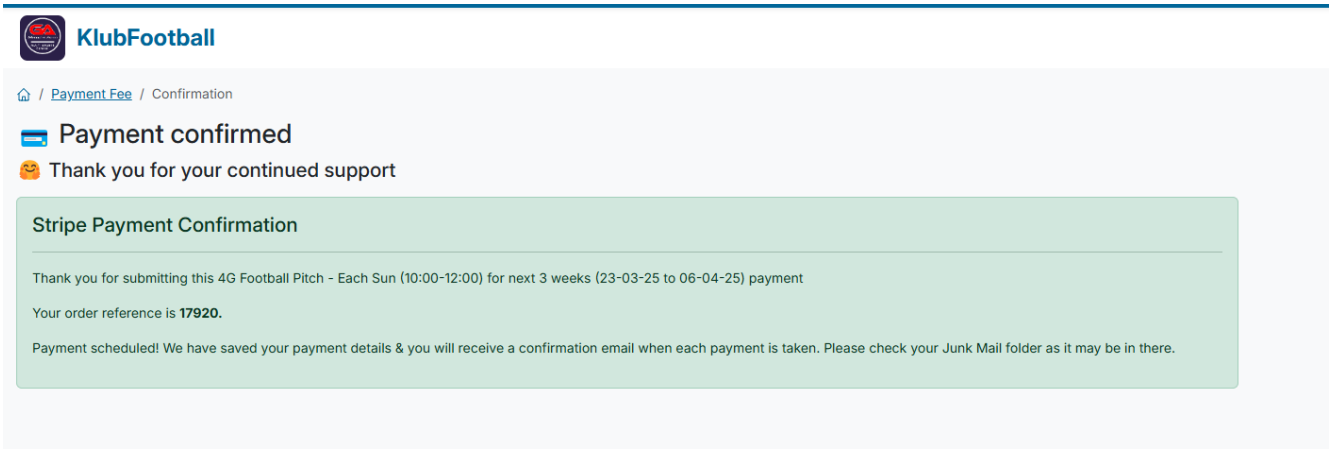
The customer will click on the link highlighted in the green box above and will be presented with the payment summary screen as below.



On clicking the Checkout button as highlighted by the red box above they will then be presented with the **Payment Screen.**



The customer fills in the details highlighted by the red boxes above and then chooses a payment option of installments or pay in full. The installment options will appear if they were previously configured in **Figure 2 : Update Payment**. On choosing the a payment option the customer will then be asked to enter their credit card details as below.



After entering their card details the customer would then confirm the payment or subscription as highlighted by the red box in the display above and they would receive confirmation of their order as below.