



# UDIO TRAINING

## MANAGERS



## Welcome to Udio's training guide for managers.

In this manual, we'll walk you through day-to-day managerial tasks such as how to create new and term-based sessions, edit sessions, add staff members and book them into their sessions as well as other administrative tasks.

The guide provides step-by-step instructions as well as visual aids so you can learn at your own pace and refer back to any section as and when you need to.

If you have any questions about the guide or would like to learn more about a certain feature or function, please send us an email at [hello@udiosystems.com](mailto:hello@udiosystems.com).

To browse our other manuals, please visit our [training page](#).

### Copyright

This manual remains the copyright of Udio, U8/22 Railway Road, Subiaco, WA 6008. It is not to be copied or reproduced without the written permission of the authors. The copyright will be protected according to International Laws of Copyright when breached.

# Contents

<b>Create sessions</b>	<b>3</b>
1.1 Create a new session for lessons for a perpetual program	3
1.2 Create assessment, complimentary or trial sessions	6
1.3 Create school holiday sessions	8
1.4 Create a term based session	10
1.5 Edit details of an existing session	13
1.6 Cancel sessions	13
<b>Bulk move students</b>	<b>14</b>
<b>Staff</b>	<b>16</b>
3.1 Add staff members	16
3.2 Permanent booking	19
3.3 Temporarily replace a staff member	21
3.4 Permanently replace a staff member	22
3.5 Permanently remove a staff member	24
<b>Applying a credit</b>	<b>24</b>
<b>Reversing an invoice</b>	<b>26</b>
<b>Direct debit</b>	<b>26</b>
6.1 Tracking payments	26
6.2 Reports	27
6.3 Rejected payments	27
<b>Stock</b>	<b>28</b>
7.1 Ordering stock	28
7.2 When the order has arrived	31
<b>Upload personal results</b>	<b>33</b>
<b>Credit your customers for a missed lesson or apply a make up due to sudden closure</b>	<b>34</b>
9.1 Cancel sessions and apply a credit or make up	34
9.2 Cancel the bookings only	36



# 1. Create sessions

Go to 'sessions' in the left-hand menu.

## 1.1 Create a new session for lessons for a perpetual program

- Click 'add new' then select 'sessions' from the drop-down menu
- Select the relevant course and facility, then 'proceed'
- Select your start date of the session
- Select one or multiple weekdays (Udio knows the interval is weekly)
- Choose the session start time and duration
- Ensure when selecting multiple days they are at the same time and have the same resources
- Tick the 'resources are only for those sessions' checkbox if the session requires the resource exclusively

**Scheduled sessions**

▼ Add New Cancel Sessions Sheets Calendar

Sessions  
Regular Booking  
Voucher/Temp Booking

Courses: Code: Facility: Training Town Any

From date: 04/11/2021 From time: To time: With spot: (show any session)

Staff Member: Staff Booking Type: Instructor Only active sessions: ☒ Only upcoming sessions: ☒

Reset Filters Filter Sessions

Thursday 4th November 2021

15 mins 16:00 to 16:15 ▼ Add Assessment 1 Spot 0 of 1 booked  
Assessment 0561 ▼ Add Supervisor 1 Spot  
Training Town: Green 1b  
View Details



**Udio**

Dashboard

People

Sessions

Waiting List

## Create Session

### Choose Course & Facility

Course: Level 1

Facility: Training Town

Proceed »

**Udio**

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

## New Sessions: Level 1

### Training Town

Start Date: 15/11/2021

Weekdays & Interval: Monday Tuesday Wednesday

Times: 16:15

Duration: 1 hour

Resources: Green 1

Resources are only for those sessions: ☒

Available to Billing Groups:

Under 'booking configurations':

- Select types from the drop-down box and enter the maximum number of each type of participant for the session, e.g. for 'student' you might want a maximum of 10 in the class
- Select 'add booking configuration' to repeat this process for any other types, such as instructor or supervisor
- Select 'confirm' to create session



## Booking configurations

Type:

Student ▼

Maximum:

10

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Type:

Instructor ▼

Maximum:

1

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Type:

Supervisor ▼

Maximum:

1

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Add Booking Configuration

Confirm

[← Go back](#)

You have now created your session which you can view under 'sessions' in the left-hand menu.



## 1.2 Create assessment, complimentary or trial sessions

- Select 'add new' then 'sessions' from the drop-down menu
- Choose the course that you are entering, select with assessment, complimentary or trial, then select the facility
- Click 'proceed'
- Enter the start date and last session date if there is one, otherwise leave blank
- Enter the weekdays and interval
- Select the times you wish to run the session, duration and the resource
- Tick 'resources are only for those sessions'

The first screenshot shows the 'Scheduled sessions' page in the Udio interface. The left sidebar has 'Sessions' highlighted. The top navigation bar includes 'Add New', 'Cancel Sessions', 'Sheets', and 'Calendar'. A dropdown menu is open under 'Add New', showing 'Sessions', 'Regular Booking', and 'Voucher/Temp Booking'. The main form has fields for 'Courses', 'Code', 'Facility' (set to 'Training Town'), 'From date' (04/11/2021), 'From time', 'To time', 'With spot' (set to '(show any session)'), 'Staff Member', and 'Staff Booking Type'.

The second screenshot shows the 'Create Session' page. The left sidebar has 'Sessions' highlighted. The main form has a section titled 'Choose Course & Facility' with a 'Course' dropdown menu set to 'Assessment' and a 'Facility' dropdown menu set to 'Training Town'. A 'Proceed »' button is at the bottom.

Udio

Dashboard

People

Sessions

Waiting List34

POS

Issues

Reports

Settings

Help Center

## New Sessions: Assessment

### Training Town

Start Date:

24/11/2021

Last Session Date (optional):

Set this date to limit weekly and daily sessions.

Weekdays & Interval:

× Everyday Sessions ×

Times:

× 15:00

Duration:

0:30 ▾

Resources:

× Yellow 1 ×

Resources are only for those sessions:

☒

Available to Billing Groups:

Under 'booking configurations':

- Select types from the drop-down box and enter the maximum number of each type of participant for the session, e.g. for 'student' (in an assessment), you might want a maximum of 3 in the class
- Select 'add booking configuration' to repeat this process for any other types, such as instructor or supervisor
- Select 'confirm' to create session

## Booking configurations

Type:

Maximum:

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Type:

Maximum:

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Add Booking Configuration

---

Confirm

[← Go back](#)

### 1.3 Create school holiday sessions

Go to the 'sessions' section:

- At the top of the screen click on 'add new' and select 'sessions'
- Choose the course that you are entering, in this case select 'school holiday - course' then select the facility and 'proceed'
- Enter the start date and last session date
- Under 'Weekdays & Interval' select 'everyday sessions'
- Select session time then duration from the drop-down box



**Scheduled sessions**

Udio

Dashboard

People

Sessions

▼ Add New Cancel Sessions Sheets Calendar

Sessions

Regular Booking

Voucher/Temp Booking

Courses: Code: Facility: Training Town

From date: 04/11/2021 From time: To time: With spot: (show any session)

Staff Member: Staff Booking Type:

**Create Session**

Udio

Dashboard

People

Sessions

Waiting List

Choose Course & Facility

Course: SH - Level 4

Facility: Training Town

Proceed >

**New Sessions: SH - Level 4**

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Help Center

Training Town

Start Date: 10/01/2022

Last Session Date (optional): 18/02/2022

Set this date to limit weekly and daily sessions.

Weekdays & Interval: × Everyday Sessions ×

Times: × 09:00

Duration: 1 hour

Resources: × Yellow 4 ×

Resources are only for those sessions: ☒

Available to Billing Groups:

Under 'booking configurations':

- Select types from the drop-down box and enter the maximum number of participants for the session
- Select 'add booking configuration' to repeat this process for any other types, such as coach and supervisor
- Select 'confirm' to create session





## Booking configurations

Type:

Student ▼

Maximum:

8

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Type:

Coach ▼

Maximum:

1

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Type:

Supervisor ▼

Maximum:

1

If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.

Delete

Add Booking Configuration

### 1.4 Create a term based session

Ensure that the term dates and eligible courses have been added to 'terms' (under 'scheduling') in settings. Then from the 'sessions' section:

- At the top of the screen click on 'add new' and select 'sessions'
- Choose the course that you are entering and your facility and click 'proceed'

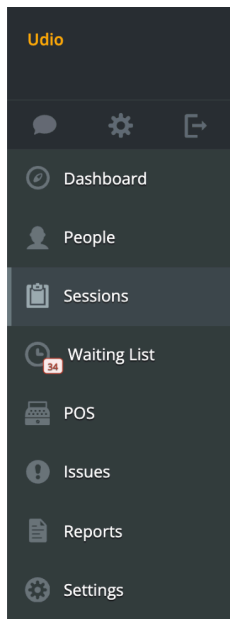


- Select the term, weekdays and times for this session
- Select the duration from the drop-down box and the resource
- Tick 'resources are only for those sessions'

The screenshot shows the Udio application's settings menu. The 'Settings' option is highlighted in the left sidebar. In the main content area, the 'Scheduling' section is highlighted with an orange box. An arrow points from this box to the 'Terms' link within the Scheduling section. Other sections visible include Packages & Purchasing, Payments, Discounts, and Users.

The screenshot shows the 'Scheduled sessions' page. The 'Add New' button is highlighted with an orange box. A dropdown menu is open, showing options: 'Sessions', 'Regular Booking', and 'Voucher/Temp Booking'. The 'Sessions' option is selected. The page includes various filters and input fields for searching sessions, such as Courses, Code, Facility, From date, From time, To time, and With spot.

The screenshot shows the 'Create Session' page. The 'Choose Course & Facility' section is highlighted with an orange box. It contains two dropdown menus: 'Course' (set to 'Term-based Level 1') and 'Facility' (set to 'Term Based'). A 'Proceed »' button is located below these dropdowns.

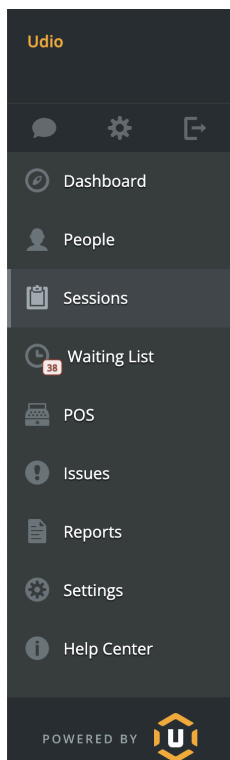


## New Sessions: Term-based Level 1

**Term Based**  
Start Term:  
25/10/2021 - 19/12/2021 Term Based  
Weekdays & Interval:  
Monday Wednesday Friday  
Times:  
17:00  
Duration:  
0:45  
Resources:  
Lane 2  
Resources are only for those sessions:  
☒  
Available to Billing Groups:

Under 'booking configurations':

- Select types from the drop-down box and enter the maximum number of participants for the session
- Select 'add booking configuration' to repeat this process for any other types, such as instructor and supervisor
- Select 'confirm' to create session



**Booking configurations**  
Type:  
Student  
Maximum:  
12  
If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.  
Delete  
Type:  
Instructor  
Maximum:  
1  
If maximum is set temporary bookings are allowed only if there were cancellations. Set maximum to '0' to allow unlimited regular and temporary bookings.  
Delete  
Add Booking Configuration

Confirm

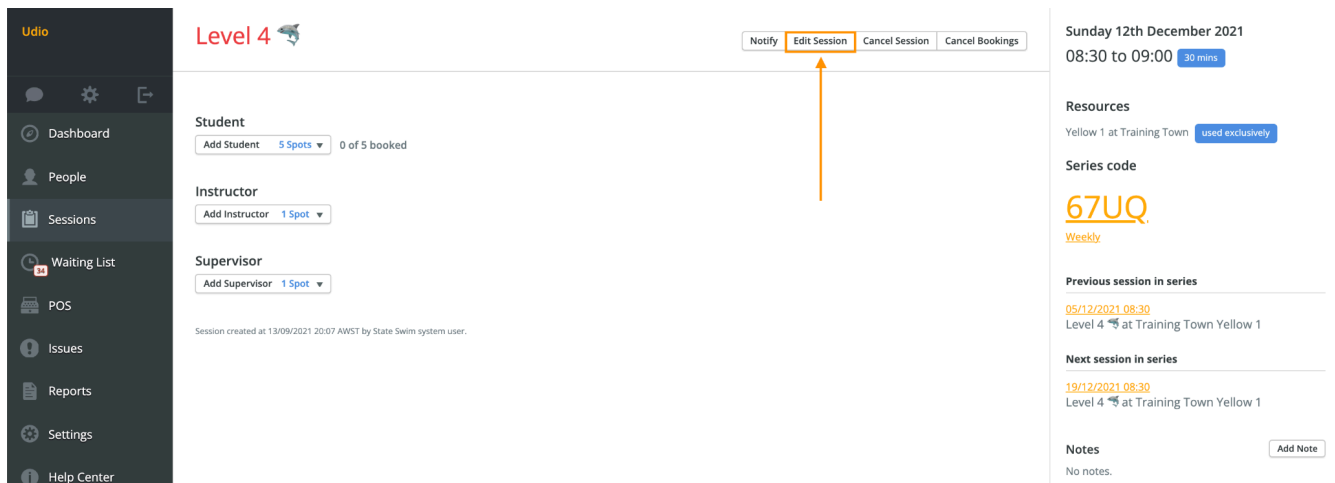
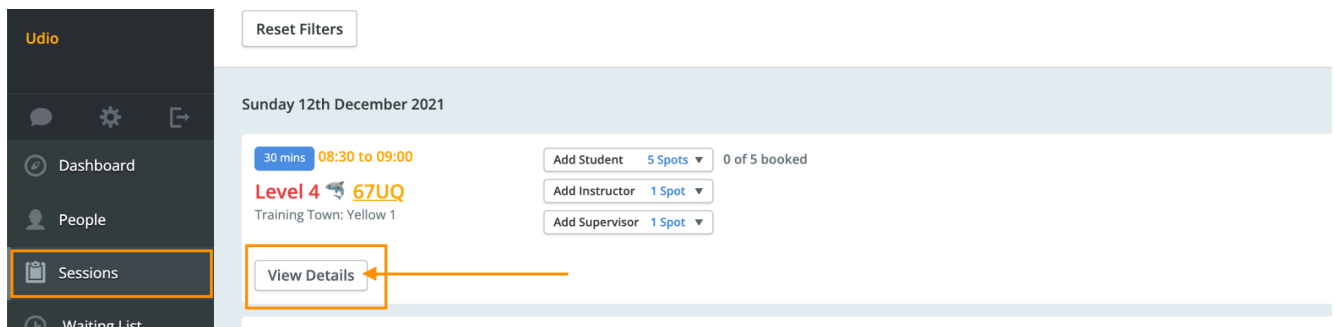
[Go back](#)



## 1.5 Edit details of an existing session

Click 'view details' on the session you want to edit

- Under 'edit session', you can update the day, start time, resource, allowed bookings and booking configurations



## 1.6 Cancel sessions

To cancel a single session or multiple session, go to the 'sessions' section:

- Filter to find the session that needs deleting and click 'view details'
- Click on 'cancel session' at the top of the page
- You have the option to tick:
  - o Cancel this session only



- Cancel this session and apply first cancellation rule for all bookings
- Cancel series (series code) with the starting date
- Click 'confirm' to cancel the session

## 2. Bulk move students

If you want to bulk move students from one session to another, start by creating the new session (if you haven't done so already):

- Go to the 'sessions' section





- Click 'add new' and select 'sessions' from the drop-down menu
- Create your new session and copy the code (e.g. 1OX8)
- Locate the session you wish to move students from and click 'move' at the top of the screen
- All students are automatically selected so there's no need to manually tick each one
- Paste the code into the search box, select the new session start date and click 'move'

**Udio**

**Level 1**

Notify **Move** Edit Session Cancel Session Cancel Bookings

There are no Instructor bookings.  
There are no Supervisor bookings.

**Student**

Add Student to waiting list Alice Reynolds, Archie Quinn, Inez Ono, Jovan Nestle

**Alice Reynolds** (\$) 6 years 10 months View health issue Cancel ...

**Archie Quinn** (\$) 10 years 8 months Cancel ...

**Sunday 24th July 2022**  
11:30 to 12:00 30 mins

**Resources**  
Green 2 at Training Town  
used exclusively

**Series code**  
**2MT4**  
Weekly

**Previous session in series**  
17/07/2022 11:30

**Udio**

**Select people to move**  
Only people with regular bookings can be moved.

**People:**

- ☒ Alice Reynolds
- ☒ Archie Quinn
- ☒ Inez Ono
- ☒ Jovan Nestle

**Select First Session**  
From the date of the session you have chosen, bookings will be moved to the selected series.  
Session must be at Training Town.

**Level 1 10X8** Tuesday 26th July 2022 10:30 5 Student 1 Supervisor 1 Coach Deselect

**Move** ← Go back to

### 3. Staff

To add bookings for staff, go to the 'people' page of the staff member.

#### 3.1 Add staff members

For staff members not already in Udio, go to the 'people' section:

- Type in the name of the staff member and click 'add name' (you don't need to 'add family')
- Fill out the staff member details and click 'confirm'



- If you want to give the staff member their own login to Udio and add email address, click 'add detail' then 'email'
- You'll then need to click 'login' and then 'manage staff login access'
- Tick the 'permit staff login' checkbox and select their email for 'login email'
- Select what permission group access you want this staff member to have and what facilities they should have access to and click 'confirm'
- When the staff member logs in for the first time, they should click 'set or reset password,' and enter the email that you added for them in Udio
- They will receive an email to that address containing a link to set their password
- Once confirmed, the staff member can login using their email and password, and will have access levels for the permission group you set earlier



Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

## People Search

Person Details:

instructor 35

Search

Instructor 11Eoo BamIsabell McleodCaroline ClarkJeni SampsonJimmy YagerInger BoatrightArnita GaryRoman MckayChelsea Mckay

No people matched your search.

PreviousNext

0 Results - [Reset filter](#)

Excel fileDownload

Add "instructor 35"

Add Family

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Help Center

## People

Add Person

Title:

Ms

Preferred name:

Instructor 35

Full name:

Instructor 35

Code (optional; external ID, number, etc.):

Gender:

Female

Date of birth:

07/04/1993

Billing Group:

Family:

☐

Bill Payer:

☐

Responsible Person:

☐

Emergency Contact:

☐

Facility:

Training Town

How did you hear about us?

Staff Member

Image:

Choose file

No file chosen

Confirm

Go back

Udio

Dashboard

People

Sessions

Waiting List

Created person

Ms Instructor 35

Edit Profile

Remove Person

Login

Regular Booking

Voucher Booking

Add Billing Account

Contact Details

No contact details.

Add Detail

Customer Contact

Last Contact: Today

Phone

Email

Address

Nickname

Website

Social

Relationships

No related people.

Health Issues

No health issues.

Add Issue

18

The Udio logo, which consists of a stylized letter 'U' inside a hexagonal frame.

**Udio**

**Instructor 35**

**Share email address**

Share existing detail:

[Confirm](#) [← Go Back](#)

**Add new email address**

Email address:

Confirm email address:

[Confirm](#) [← Go Back](#)

**Udio**

**Ms Instructor 35**

[Send emails](#) [Edit Profile](#) [Remove Person](#) [Login](#) [Manage staff login access](#)

**Regular Booking** **Voucher Booking** **Add Billing Account**

**Contact Details** [Add Detail](#)  
 instructor35@yourbusiness.com

**Customer Contact** [Contacted](#)  
 Today

**Relationships** [Add person](#)  
 No related people.

**Health Issues** [Add issue](#)  
 No health issues.

**Udio**

**Configure Staff Login Access**

**Staff access for Instructor 35**

Permit staff login:  
☒

Login email:

Permission groups:  
☐ Administrators  
☐ Area Manager  
☐ Coach  
☐ Customer Service Officer  
☐ Franchisee  
☒ Instructor  
☐ Operations Manager  
☐ Reports Only  
☐ Super Duper  
☐ Supervisor

Allow access to:  
☐ Term Based  
☒ Training Town

[Confirm](#) [Go back](#)

### 3.2 Permanent booking

- Click on 'add bookings' from the 'people' page of the staff member
- Select 'add regular bookings' from the drop-down box
- Select course and booking type and 'proceed'





- Select the times and 'proceed' (note - you can select multiple times if they are for the same course)
- Ensure the start date is correct and 'proceed'
- Click 'confirm new bookings'

**Billing Account** [1bttnkuv](#) [View Billing Account](#)

Current Balance  
**\$0.00**

No active purchases

Instructor No 1 has no vouchers [Add](#)

**Bookings**

[Add Bookings](#) [Cancel](#) [Remove](#) [View all](#) [659](#)

[Add Regular Bookings](#) [Add Voucher or Temporary Bookings](#)

**Upcoming Bookings**

[Mon 11/07/2022 09:30](#) [Cancel](#)

**Level 2** [RJ7L](#)

Training Town - Instructor - Green 1b  
Instructor: Instructor No 1  
Supervisor: Supervisor No 1

[Mon 11/07/2022 10:30](#) [Cancel](#)

Book per session or with vouchers here'. The form includes fields for 'Selected People' (Instructor No 1), 'Facility' (Training Town), 'Course' (Level 1), and 'Booking Type' (Instructor). At the bottom, the 'Proceed »' button is highlighted with an orange box and arrow."/>

**Add New Regular Booking**

This form adds regular bookings into all sessions of the series [Book per session or with vouchers here](#)

Selected People:  
Instructor No 1

Facility:  
[Training Town](#)

Course:  
[Level 1](#)

Booking Type:  
[Instructor](#)

[Proceed »](#)

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Operations

Reports

Course:

Level 1

Booking Type:

Instructor

Days and Times:

Tuesday

☒ 15:30
 

OBAL

from 12/07/2022

Instructor: 1

Wednesday

☒ 10:00
 

X4NE

from 13/07/2022

Instructor: 1

Thursday

☐ 09:30
 

91US

from 07/07/2022

Instructor: 1

Saturday

☐ 09:30
 

ZQ9T

from 09/07/2022

Instructor: 1

Sunday

☐ 11:30
 

2MT4

from 10/07/2022

Instructor: 1

Proceed »

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Operations

Days and Times:

Tuesday

☒ 15:30
 

OBAL

from 12/07/2022

Instructor: 1

Wednesday

☒ 10:00
 

X4NE

from 13/07/2022

Instructor: 1

Thursday

☐ 09:30
 

91US

from 07/07/2022

Instructor: 1

Saturday

☐ 09:30
 

ZQ9T

from 09/07/2022

Instructor: 1

Sunday

☐ 11:30
 

2MT4

from 10/07/2022

Instructor: 1

Select Start Date

Start Date:

13/07/2022

Proceed »

### 3.3 Temporarily replace a staff member

This is the option for a staff member who is away on holiday or sick for example and you want to cover their class(es).

- Go to 'sessions' and click 'view details' of the session that needs updating
- Click on the three dots (...) next to the staff member's name and select 'replace staff member'
- Click 'find sessions' if there are multiple classes to be replaced; click 'select'
- Search the staff member replacing them and click 'select'



- Select 'temporarily, for the selected sessions only' from the drop-down and click 'replace'

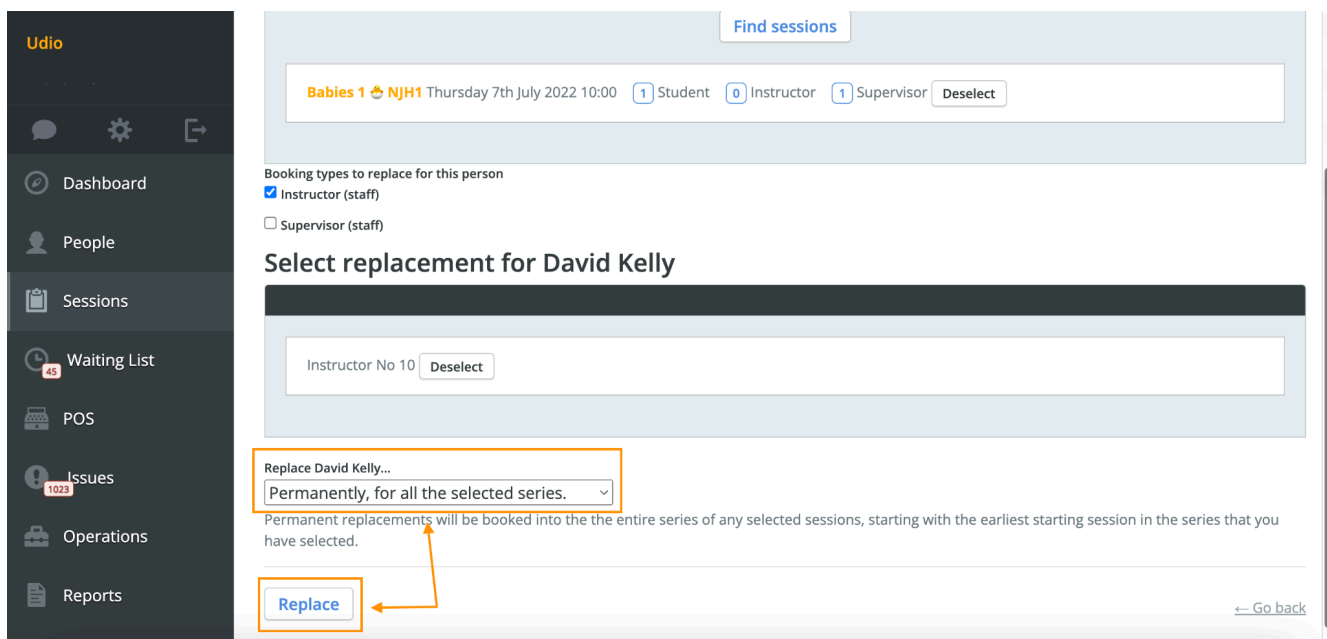
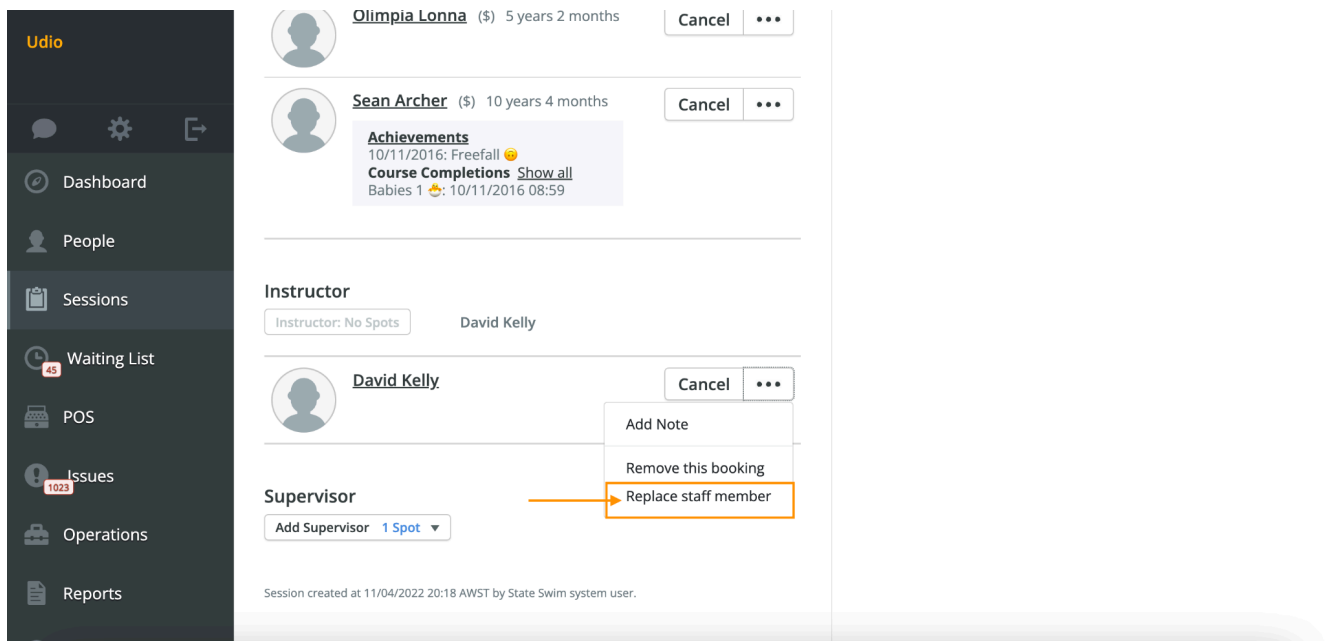
### 3.4 Permanently replace a staff member

This is the option for when a staff member is no longer working in that class and you want to replace them permanently with another staff member.

- As above, go to 'sessions' and click 'view details' of the session that needs updating



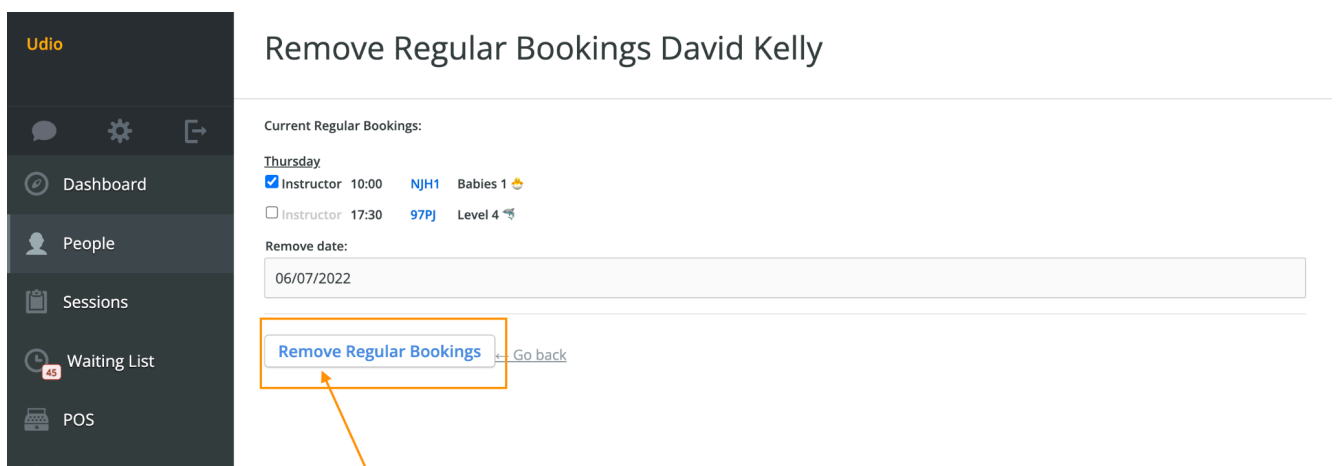
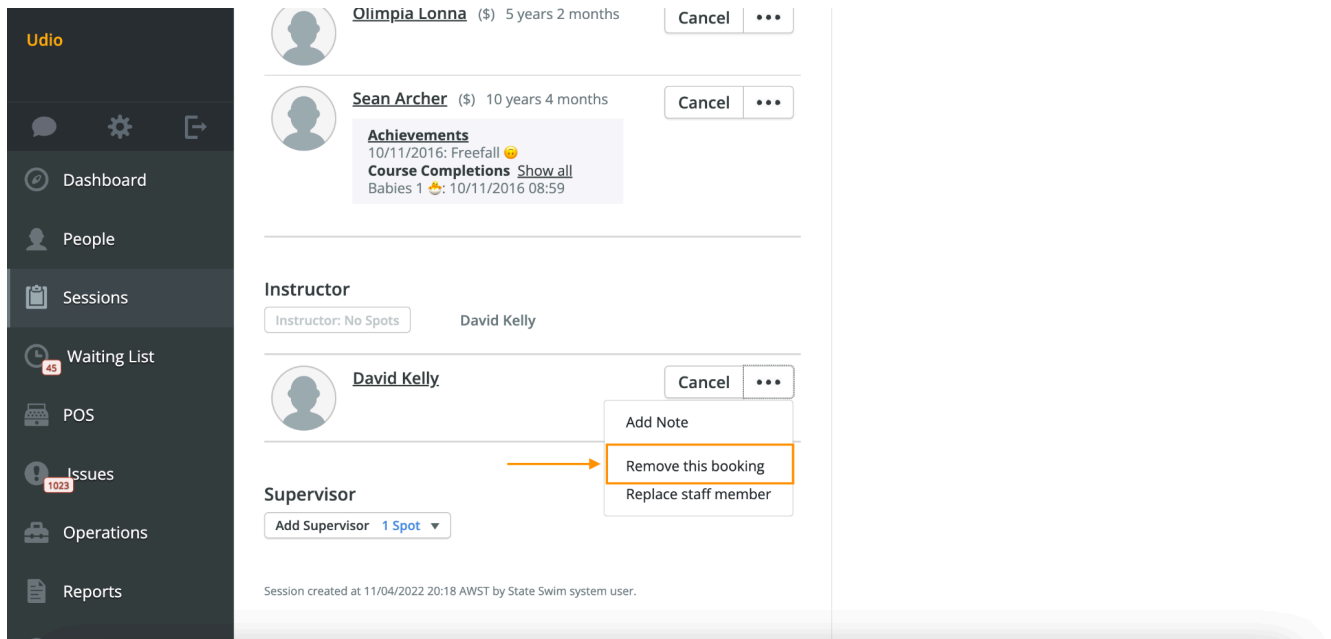
- Click on the three dots (...) next to the staff member's name and select 'replace staff member'
- Check that the correct series is selected and add other by clicking 'find sessions'
- Search the staff member replacing them and click 'select'
- Select 'permanently, for all the selected series' from the drop-down and click 'replace'



### 3.5 Permanently remove a staff member

This is the option for when you want to close a class down.

- Go to 'sessions' and click 'view details' of the session that needs updating
- Click on the three dots (...) next to the staff member's name and select 'remove this booking'
- Select the sessions to be permanently removed and click 'Remove regular bookings'



### 4. Applying a credit

- Go to the person's billing account and click 'add credit'





- Add the \$ amount you wish to credit the account with
- Enter a description, select the person you're applying the credit to (if it's for a family, leave blank) and select facility

You should now see the credit on the customer's account. When you go to 'make payment' or if the customer has a recurring payment, the invoice will reflect the balance to include the credit amount.

Repeat for all affected accounts.

**Billing Account** 19zc7avm Re-Charge

**CURRENT BALANCE**  
\$0.00

**Recent activity** View All Activity

**Payment Settings** Change  
Automatic Payments Allowed

**People** Add person

- Gary Taylor *emergency contact responsible person family bill payer*
- Zoe Taylor *family*

**Credits**  
No credits.

**Notes** Add New  
No notes.

**Billing Account: 19zc7avm | Gary Taylor**

**Add Credit**

Value: 25

Description: Cancelled lesson

Person: Zoe Taylor

Facility: Training Town

Confirm Go back

**Billing Account** 19zc7avm Re-Charge

**CURRENT BALANCE**  
\$25.00

**Recent activity** View All Activity

**Payment Settings** Change  
Automatic Payments Allowed

**People** Add person

- Gary Taylor *emergency contact responsible person family bill payer*
- Zoe Taylor *family*

**Credits**  
Training Town: \$25.00 Apply

**Notes** Add New  
No notes.



## 5. Reversing an invoice

- Go to the person's billing account and click 'view all activity'
- Locate the invoice that needs to be reversed
- Click on the red label 'reverse' and 'confirm'

The invoice will be reversed, as will the charges.

The screenshot displays the Udio Billing Account interface for account 30wklrsro. The current balance is \$0.00. The 'Recent activity' section shows a payment of \$95.00 on 01/11/2021. The 'View All Activity' button is highlighted with an orange box and an arrow. The 'Payment Settings' section shows automatic payments are allowed. The 'People' section lists Inez Ono (family) and Polly Ono (emergency contact, responsible person, family, bill payer). The 'Credits' section shows no credits. The 'Notes' section shows no notes.

**Billing Account: 30wklrsro Statement**

Starting from: Up until: Show Items: Person:

Filter

Date & time	Description	Value	Balance	Actions
01/11/2021 03:17 AWST	Payment (Recurring Payments: Credit Card Visa ...4242 09/2023) <a href="#">polly ono</a> <a href="#">30wklrsro-inv30</a>	\$95.00	\$0.00	<a href="#">Reverse</a>
01/11/2021 00:01 AWST	Charge <a href="#">inez ono</a> <a href="#">30wklrsro-inv30</a>	-\$95.00	-\$95.00	Unable to reverse: Payment should be reversed

## 6. Direct debit

### 6.1 Tracking payments

All accounts flagged with direct debit information will have their invoices 'paid' in four to six hours after raising. In the billing account, you will see the payment transaction with the notation showing your payment provider.



## 6.2 Reports

### Payments list

This report is not to be included in your banking. You can filter on types (payment provider) and status ('finalized', 'all' or 'only in processing')

*Finalized* – transactions have been submitted and finalized in the batch process. Transactions are both successful and unsuccessful.

*All* – displays all transactions in 'finalized' and 'only in processing' status

*Only in processing* – transactions that have been submitted but not finalized

Payments List

\$0.00

Types: IntegraPay, Merchant Warrior, Debitsuccess

Status: Finalized, All, In Processing

Filter

### Payment batches

This report allows you to see all the batches with the date and time stamp, as well as the events log.

Payment Batches

Facility: Training Town, Provider: Merchant Warrior (Credit Card), Status: All

Filter

Created	Sent	Provider	Facility	Payments	Submit Code	Finalized	Response Code
01/04/2020 07:43 AWST	01/04/2020 07:49 AWST	Merchant Warrior (Credit Card)	Training Town	4	0	01/04/2020 08:09 AWST	finalized
01/03/2020 08:00 AWST	01/03/2020 08:05 AWST	Merchant Warrior (Credit Card)	Training Town	4	0	01/03/2020 08:08 AWST	finalized
13/02/2020 16:02 AWST	13/02/2020 16:07 AWST	Merchant Warrior (Credit Card)	Training Town	1	0	13/02/2020 16:22 AWST	finalized
06/02/2020 14:12 AWST	06/02/2020 14:17 AWST	Merchant Warrior (Credit Card)	Training Town	1	0	06/02/2020 14:22 AWST	finalized

## 6.3 Rejected payments

- To view rejected payments and corresponding accounts, go to the 'outstanding invoices' report in the reports section
- Filter on facility or all facilities and a date range



- Tick the box 'automatic payment error' to display all rejected payments
- You can see the reason for the rejection and, depending on your business's policy, you can retry the payment

\*The customer will receive an emailed payment invoice when the transaction has been successfully completed.

\*\*Whenever the customer has an outstanding invoice (amount), Udio will pay it off within 4 hours of the invoice raising.

**Outstanding Invoices**

Facility: All Starting from: 01/08/2021 00:00 AWST Up until: 01/12/2021 00:00 AWST Booking week day:

Billing Group: Automatic payment error: ☒ Filter

Invoice	Facility	Bill payer	Created	Outstanding
<a href="#">1d73tlgg-INV95</a>	Training Town	<a href="#">Jacki Kennedy</a>	01/08/2021 00:00 AWST	Your card has expired. \$95.00
<a href="#">1d73tlgg-INV96</a>	Training Town	<a href="#">Jacki Kennedy</a>	01/08/2021 00:00 AWST	Your card has expired. \$95.00
<a href="#">2bf34e-INV436</a>	Training Town	<a href="#">Ivan The Great</a>	01/08/2021 00:01 AWST	Your card was declined. \$95.00
<a href="#">2bf34e-INV437</a>	Training Town	<a href="#">Ivan The Great</a>	01/08/2021 00:01 AWST	Your card was declined. \$95.00

## 7. Stock

### 7.1 Ordering stock

Go to 'settings' section and scroll down to 'product catalogue':

- Click 'all stores' and select the relevant store
- Select 'stock' in the top right-hand corner
- Click 'stock orders' in the top right-hand corner and 'add new order'
- Click on the source (supplier) you are ordering from and 'create order'
- Click on the item you are ordering and add the amount
- Repeat for all products that are being ordered

- Once complete, click 'update order' then 'send for processing'
- There will be chance to check the order one final time - once happy, click 'send for processing'
- Once contact with the company has been made, click 'dispatch order'

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

**Settings**

Product Catalogue

All stores

All suppliers

All categories

All brands

All product attributes

All products

All SKUs

All sale orders

All stock orders

List all stocktakes

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

## Training Town

Facility: Training Town

Billing account: 17im5q

Orders Stock from: Coca Cola Amatil Streets WA

Edit Remove **Stock** Retail Prices

### Recent orders

View All Orders

#	Created	Status	Total
dtzx4jk	04/11/2021 08:50 AWST	Closed	\$13.64

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

## Training Town Stock

Adjust Stock Adjustments History **Stock Orders** Stocktakes

Back to store

In stock: In stock

Search: SKU code, attribute, product, category or bra

Brands:

Only show SKUs without wholesale prices: ☐ Filter

Product	SKU	SKU code	In stock	Wholesale Price, Net
Big Can of Coke		987654321	70	Coca Cola Amatil \$0.00
Coke		green-coke	985	—



Udio

Dashboard

People

Sessions

Waiting List

## Training Town Stock Orders

[← back to Store stock](#)

Add New Order

Suppliers: [Coca Cola Amatil](#), [Streets WA](#)

Status: Any

Starting from:

Up until:

Code:

Filter

Udio

Dashboard

People

Sessions

## Choose a Supplier

Source: Streets WA

Create Order

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

## Update Stock Order er2o2c1

Supplier: Streets WA

magnum

Categories / Search

Magnum Flavour: Almond

123456789

\$2.00

Magnum Flavour: Classic

93259323

\$2.20

Basket

Remove all items

50

Magnum Flavour: Almond

123456789

Remove

\$100.00

Manage Discounts

Total Ex GST \$91.00

GST \$9.00

Total \$100.00

Cancel order

Update Order

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

## Stock Order er2o2c1

Edit Cancel Order

Status: New

Store: Training Town

Supplier: Streets WA

Status history: New Hayley Yager

14/11/2021 21:50 AWST

Send for Processing

### Items

Product	Attributes	SKU code	Quantity	Tax	Price, Each	Item total
Magnum	Flavour: Almond	123456789	50	\$0.18	\$2.00	\$100.00
Sub-Total						\$91.00
GST						\$9.00
Total						\$100.00

30

Udio

Dashboard

People

Sessions

Waiting List

POS

## Stock Order er2o2c1

[Change order status to Processing](#)

Changing the status to 'processing' will prevent further amendments to this order.

Are you sure you wish to continue?

### Items

Product	Attributes	SKU code	Quantity
Magnum	Flavour: Almond	123456789	50

[← Go back](#)
[Send for Processing](#)

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

## Stock Order er2o2c1

[Cancel Order](#)

### Status: Processing

Store: Training Town  
 Supplier: Streets WA  
 Status history: Processing  
 New

Hayley Yager  
 Hayley Yager

14/11/2021 21:56 AWST  
 14/11/2021 21:50 AWST

[Revert to New](#)
[Dispatch Order](#)

### Items

Product	Attributes	SKU code	Quantity	Tax	Price, Each	Item total
Magnum	Flavour: Almond	123456789	50	\$0.18	\$2.00	\$100.00
<b>Sub-Total</b>						<b>\$91.00</b>
<b>GST</b>						<b>\$9.00</b>
<b>Total</b>						<b>\$100.00</b>

## 7.2 When the order has arrived

Go to the 'dashboard' section:

- Click on the relevant date and time of your stock order
- Click 'mark as received'
- Count the order; if correct click 'accept & close order,' if incorrect, do not proceed any further until you have contacted the supplier
- After a final check, click 'close order'

Your stock levels will automatically increase.



Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

### Pending stock orders

New			
eaajal4j	14/11/2021 21:49 AWST	Streets WA	Training Town
View all new orders 1			
Processing			
7dgyhls	10/05/2019 14:52 AWST	Coca Cola Amatil	Training Town
er2o2c1	14/11/2021 21:50 AWST	Streets WA	Training Town
View all processing orders 2			

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

### Stock Order er2o2c1

Cancel Order

**Status: Dispatched**

Store: Training Town  
Supplier: Streets WA  
Status history: Dispatched Processing New

Hayley Yager 15/11/2021 08:07 AWST  
Hayley Yager 14/11/2021 21:56 AWST  
Hayley Yager 14/11/2021 21:50 AWST

Mark as Received

**Items**

Product	Attributes	SKU code	Quantity	Tax	Price, Each	Item total
Magnum	Flavour: Almond	123456789	50	\$0.18	\$2.00	\$100.00
<b>Sub-Total</b>						<b>\$91.00</b>
<b>GST</b>						<b>\$9.00</b>
<b>Total</b>						<b>\$100.00</b>

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

### Stock Order er2o2c1

Cancel Order

**Status: Received**

Store: Training Town  
Supplier: Streets WA  
Status history: Received Dispatched Processing New

Hayley Yager 15/11/2021 08:11 AWST  
Hayley Yager 15/11/2021 08:07 AWST  
Hayley Yager 14/11/2021 21:56 AWST  
Hayley Yager 14/11/2021 21:50 AWST

Accept & Close Order

**Items**

Product	Attributes	SKU code	Quantity	Tax	Price, Each	Item total
Magnum	Flavour: Almond	123456789	50	\$0.18	\$2.00	\$100.00
<b>Sub-Total</b>						<b>\$91.00</b>
<b>GST</b>						<b>\$9.00</b>
<b>Total</b>						<b>\$100.00</b>

Udio

Dashboard

People

Sessions

Waiting List

POS

### Close Stock Order er2o2c1?

Close Stock Order er2o2c1

Stock levels will be adjusted at Training Town.

Are you sure you wish to continue?

**Items**

Product	Attributes	SKU code	Quantity
Magnum	Flavour: Almond	123456789	50

Close Order

Go back





## 8. Upload personal results

To enter student's times, go to their 'people' page, and under 'member details' you will see 'personal results'.

- Click 'view results'
- Click 'add new result' in the top right-hand corner
- Select the discipline from the drop-down box
- Update the date and event (if required)
- Enter the value (time) in this format: 00:00.00

The times are displayed on this page as well as the number of PBs and which are the current PBs.

The screenshot displays the Udio member profile for Isabell Mcleod. The interface includes a sidebar with navigation options like Dashboard, People, Sessions, and Settings. The main content area is divided into several sections:

- Today:** A summary card for a session on Mon 15/11/2021 at 18:00, labeled 'Squad Beginner' with a USH9 badge. It lists 'Training Town - Student - Green 1b, Green 1, Green 2' and has a 'Cancel' button.
- Member Details:** A section containing fields for Date of birth, Card ID, Payment Method (Unavailable), Achievements, and Course Completion. Each field has a corresponding 'Manage' or 'View' button.
- Personal Results:** A section showing '5 PBs' (Personal Bests) and a 'View Results' button. This section is highlighted with an orange box, and an arrow points to the 'View Results' button.
- Billing Account:** A section showing the current balance as '\$0.00' and active purchases, including 'Teams Unlimited sessions per week' and 'Training Town'. It also indicates the next charge on 01/12/2021.
- Contact Details:** A section with contact information such as phone number (555 1234), address (WA 6000), and email (emcleod@mailinator.com).
- Customer Contact:** A section indicating the last contact was 307 days ago.
- Relationships:** A section showing relationships with other users, including Ewa Mcleod.
- Health Issues:** A section indicating no health issues are recorded.
- Qualifications:** A section indicating no qualifications are recorded.
- Notes:** A section indicating no notes are recorded.
- Question answers:** A section indicating no answers are recorded.



Udio

Hayley Yager

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Results for Isabell Mcleod (16y)

Has 5 PBs. Achieved Well Done on 06/10/2021.

Go back

Add New Result

Discipline:

Filter

Discipline	Date	Age at Result			
25 Butterfly	06/10/2021 Race night	16	01:32.44	PB BTE	Edit Delete
50 Butterfly	06/10/2021 Race night	16	02:10.11	PB BTE	Edit Delete
40 Backstroke	06/10/2021 Race night	16	02:55.02	PB BTE	Edit Delete
50 Backstroke	06/10/2021 Race night	16	00:58.21	PB BTE	Edit Delete
200 IM	06/10/2021 Race night	16	02:30.78	PB BTE	Edit Delete

Results

Add Result

Discipline:

50 Butterfly

Date:

15/11/2021

Event:

Value:

00:45.74

Confirm

Go back

## 9. Credit your customers for a missed lesson or apply a make up due to sudden closure

There will be times when you'll need to cancel a session or the bookings due to a sudden closure, such as the plant room failing.

We strongly recommend that you test this in Sandbox before proceeding in Production to ensure this does what you need it to.

### 9.1 Cancel sessions and apply a credit or make up

Go to the 'sessions' section in the left-hand menu:

- Click 'cancel sessions' in the top right-hand corner
- Select the sessions you want to cancel (use 'select' only and only do 6 or so at a time)
- Select the action you wish to do:

- Option 2 'cancel sessions & bookings' – 'issue vouchers using the first cancellation rule' is to apply a make up if set up
  - Option 3 'cancel sessions & bookings' – 'apply credits for regular bookings, return vouchers for once off bookings'
- Click 'confirm'

The session(s) will be cancelled and for option 3, the credit will be applied to the customer and make up vouchers reinstated.

Please note, when you cancel a session, the booking numbers will not be displayed on the bookings statistics report.

If you still want to see the booking numbers, you can cancel the bookings for that session and the credits and make up re-issue will also work. This has to be done for each session.

**Udlo**

Scheduled sessions

[Add New](#)
[Cancel Sessions](#)
[Sheets](#)
[Calendar](#)
[Session List Settings](#)

Courses:  Code:  Facility:  Weekday:

From date:  From time:  To time:  With spot:

Staff Member:  Staff Booking Type:  Only active sessions: ☒ Only upcoming sessions: ☒

[Reset Filters](#) [Filter Sessions](#)

## Cancel sessions

Select sessions to cancel

Course

Any

Code

Facility

Training Town

Weekday

Any

From date

15/11/2021

To date

16/11/2021

From time

To time

☒ Squad Intermediate SL0U Monday 15th November 2021 06:30 17 Student 1 Coach Deselect

☒ Level 2 IXU0 Monday 15th November 2021 07:00 7 Student 1 Coach Deselect

☒ Babies 1 YQ60 Monday 15th November 2021 07:00 4 Student 1 Instructor 1 Supervisor Deselect

☐ Toddler 1 JZWR Monday 15th November 2021 08:30 Select series 0 Student 0 Instructor 1 Supervisor Select

☐ Babies 1 SGX1 Monday 15th November 2021 09:00 Select series 5 Student 1 Instructor 1 Supervisor Select

Previous

Results 1 to 5 of 58

Next

☐ Squad Intermediate SL0U Monday 15th November 2021 06:30 17 Student 1 Coach Deselect

☐ Level 2 IXU0 Monday 15th November 2021 07:00 7 Student 1 Coach Deselect

☐ Babies 1 YQ60 Monday 15th November 2021 07:00 4 Student 1 Instructor 1 Supervisor Deselect

☐ Cancel Sessions & Bookings  
Do not issue any Vouchers or Credits

☐ Cancel Sessions & Bookings, give vouchers  
Issue Vouchers using the first cancellation rule

☒ Cancel Sessions & Bookings, give credits & return vouchers  
Apply Credits for regular bookings, return Vouchers for once-off bookings

☐ Cancel Series of selected sessions, starting from the earliest selected Session for each Series

☐ Cancel Bookings only  
Do not issue any Vouchers or Credits

☐ Cancel Bookings only, give vouchers  
Issue Vouchers using the first cancellation rule

☐ Cancel Bookings only, give credit & return vouchers  
Apply Credits for regular bookings, return Vouchers for once-off bookings

☐ Cancel Purchases for all customers in the selected Series  
Starting from the earliest selected Session overall

☐ Cancel Purchases & Apply Credit  
Credit will be proportional to the period charged, but not attending

Credit value:

25

Confirm

← Go back

## 9.2 Cancel the bookings only

Go to the 'sessions' section in the left-hand menu:

- Click 'view details' on the session you wish to cancel the bookings for
- Click 'cancel bookings'
- Select all or some of the students



- Select the applicable cancellation rule and click 'confirm'

**Scheduled sessions**

[Add New](#)
[Cancel Sessions](#)
[Sheets](#)
[Calendar](#)
[Session List Settings](#)

Courses: 
 Code: 
 Facility: 
 Weekday:

From date: 
 From time: 
 To time: 
 With spot:

Staff Member: 
 Staff Booking Type: 
 Only active sessions: ☒
 Only upcoming sessions: ☐

[Reset Filters](#)
[Filter Sessions](#)

**Wednesday 17th November 2021**

30 mins 09:30 to 10:00 (\$)
 [Add Student](#)
 3 Spots
 7 of 10 booked

**Babies 1** 2SXY  
 Training Town: Yellow 1

Instructor: No Spots
 Instructor No 3  
 Supervisor: No Spots
 Supervisor No 1

[View Details](#)

**Babies 1**

[Notify](#)
[Edit Session](#)
[Cancel Session](#)
[Cancel Bookings](#)

**Student**  
[Add Student](#)
 3 Spots
 7 of 10 booked

**Amanda Jacka** (\$) 2 years 9 months  
[Achievements](#)
[Needs to work](#)

[Cancel](#)

**Wednesday 17th November 2021**  
 09:30 to 10:00 30 mins

**Resources**  
 Yellow 1 at Training Town [used exclusively](#)

**Series code**  
 2SXY

**Babies 1** Wednesday 17/11/2021 09:30

**Cancel bookings**

Are you sure you wish to cancel these bookings?

Bookings:

S Doncon as Student  
 Walter Didi as Student  
 Instructor No 3 as Instructor  
 Supervisor No 1 as Supervisor

Apply this cancellation rule:

☐ Cancel Only  
☒ Apply First Available Cancellation Rule  
☐ Apply Credit

Credit Amount (optional):

Optionally issue credit to all selected people after cancelling the booking

[Confirm](#)
[Go back](#)

