UDIO TRAINING

TERM ROLLOVERS

Welcome to the training guide for term rollovers.

In this manual, we'll walk you through how to rollover your term, inform customers and create your new term.

The training 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 support@udiosystems.com.

To browse our other manuals, please visit our training page.

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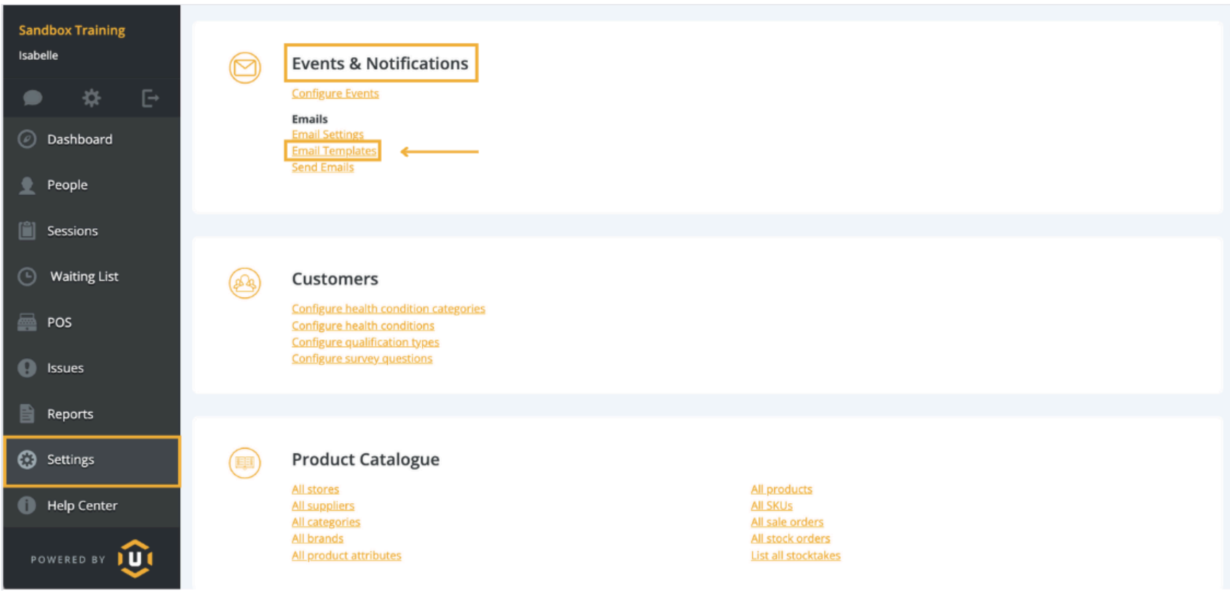
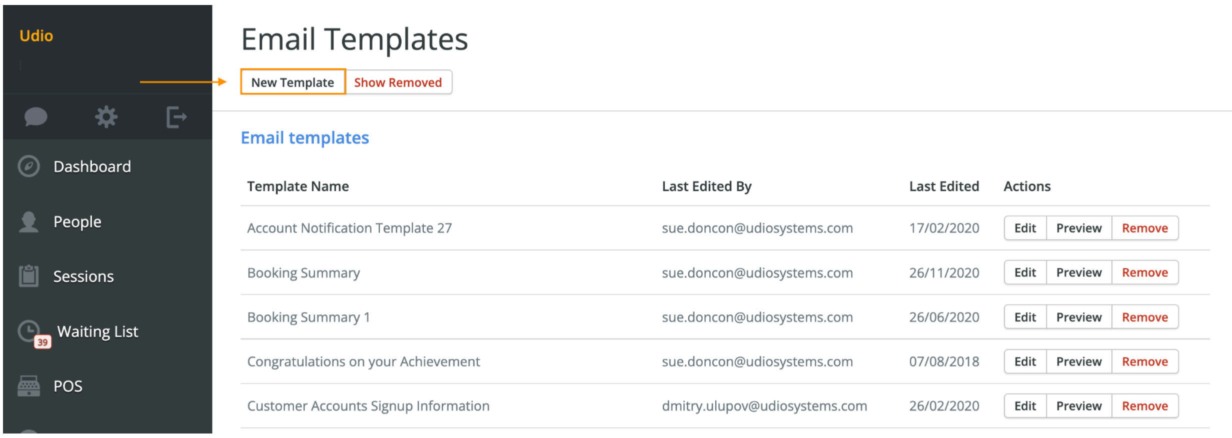
1. Prior to rolling over the term

Before your term rollover, you can inform your current customers of next term's rollover dates and give them the opportunity to let you know if they're not planning to return next term.

To create the email, select *'Email Templates'* under 'Emails & Notifications' followed by *'New Template.'*





Below is an example email that you can adapt as needed.

1.1 Email template example

Hi {{ person_first_name }},

We really value you being part of the {{ account }} family. Please take a few moments to read the important dates for our term rollover.

Term __ rollover

On ((insert day and date)), we will commence enrolments for term ((_)), which runs for ((_)) weeks from ((insert from date)) until ((insert end date)).

As an existing customer, we have given you priority and automatically reserved your spot for term ((_)).

If you want to continue, no action is required. We'll automatically charge you the term fees of ((insert your term fees)) per student to secure your booking. To avoid being charged additional fees, please ensure that the payment method on your account is correct and you have sufficient funds available.

If you do not wish to continue next term, please contact us by ((insert day and date)). You will not be charged for the term.

If you are keen to continue but at a different time, please contact us with your preference.

To secure your booking, payment must be set up via direct debit. Please log into your portal to set up your details. If you don't have an account, please click on this link {{ customer_accounts_signup_link }}.

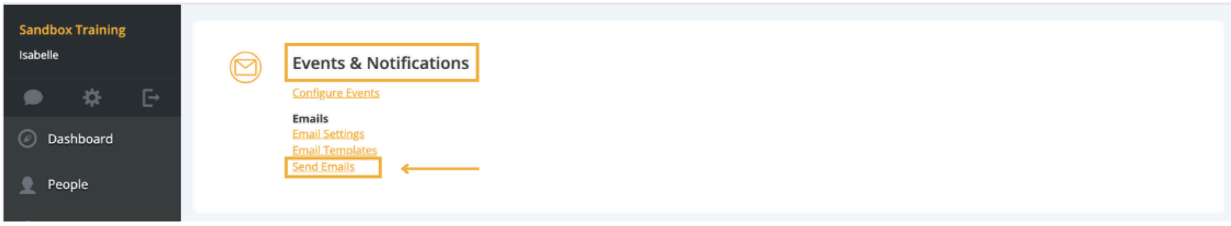
Regards,

((Your business name))

1.2 Rollover checklist

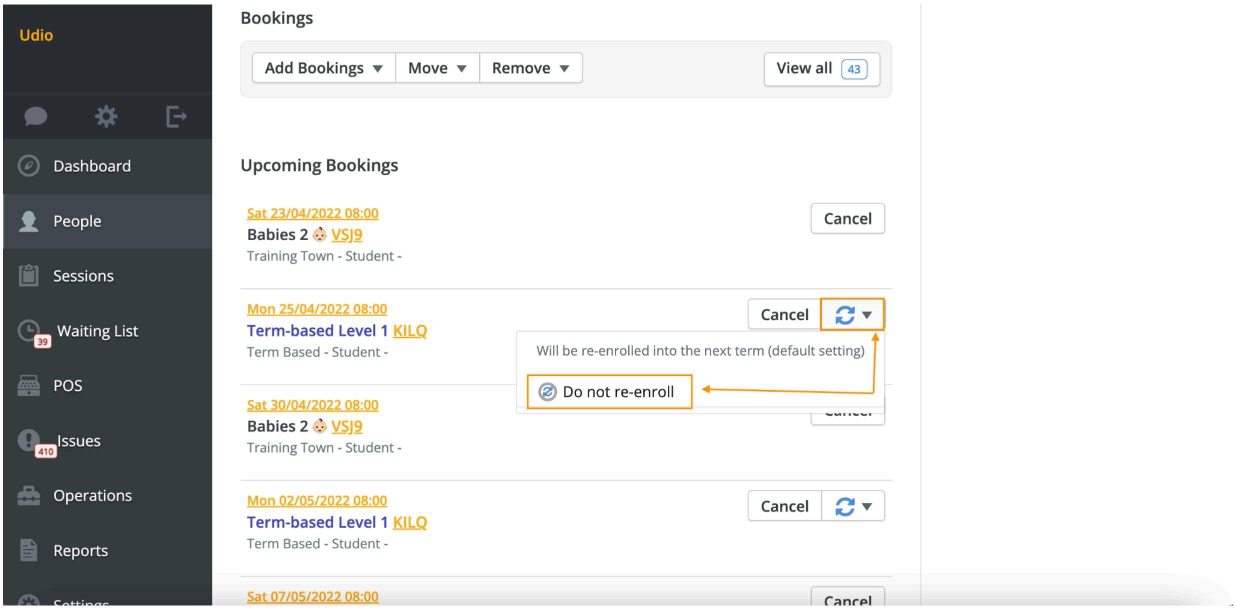
Before you roll over your term, we recommend following the checklist below to make sure everything rolls over smoothly.

- **Email your customers**
- Create an email using the above example if you wish, filling in the highlighted areas to reflect your rollover details
- Once your template is complete, go back to *'Emails & Notifications'* and click *'Send Emails'*



- **Update customer information**
- If a customer advises you that they are not returning, go to the student's page under 'People'
- Under bookings, click on the rotating circular arrows and select *'Do not re-enroll'*

This will ensure that when the term is rolled over, this customer is not included.

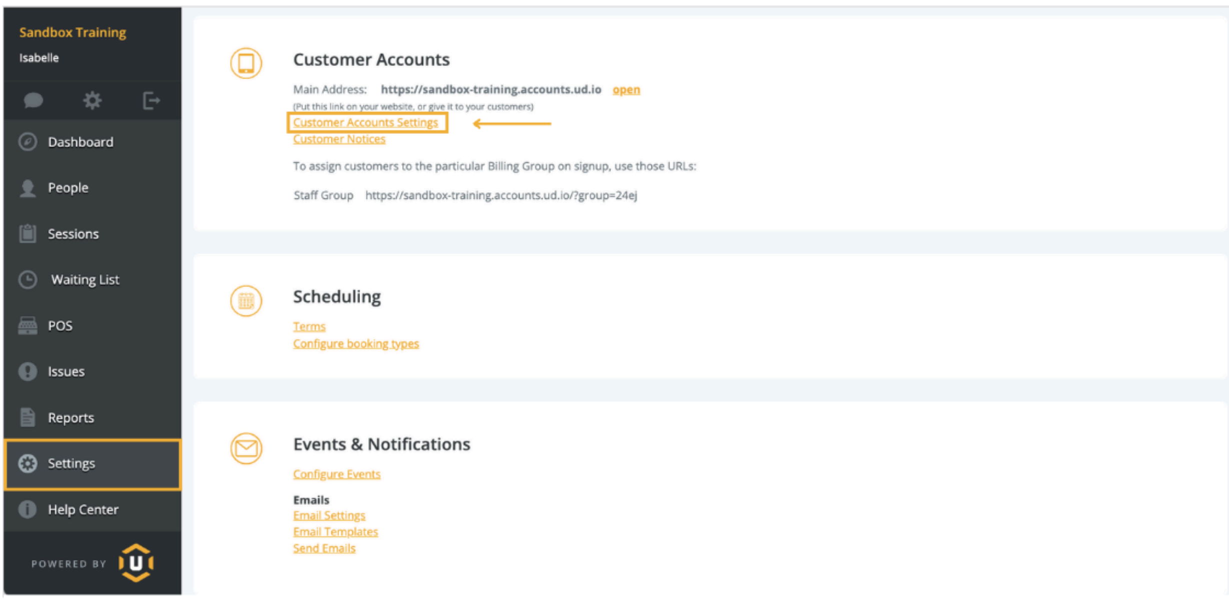


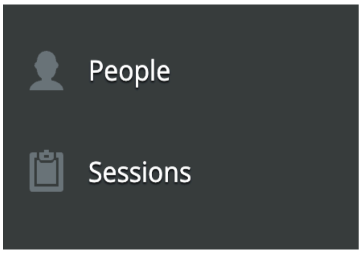
- **Update ‘Customers Accounts Mode’**

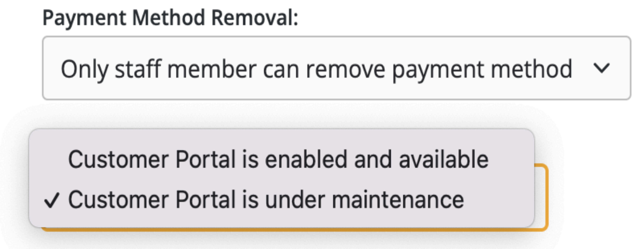
Whilst you are updating your timetable, you will want to stop customers from moving their bookings.

Under ‘Settings’, scroll down to ‘Customer Accounts’ and click *‘Customer Accounts Settings’*

Under ‘Customer Accounts Mode’ update the dropdown box to ‘Customer Portal is under maintenance’



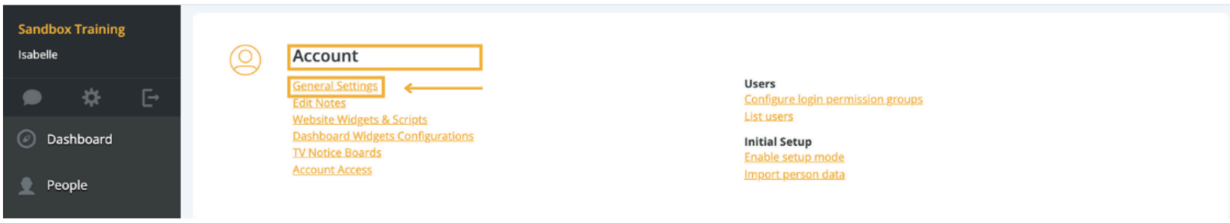


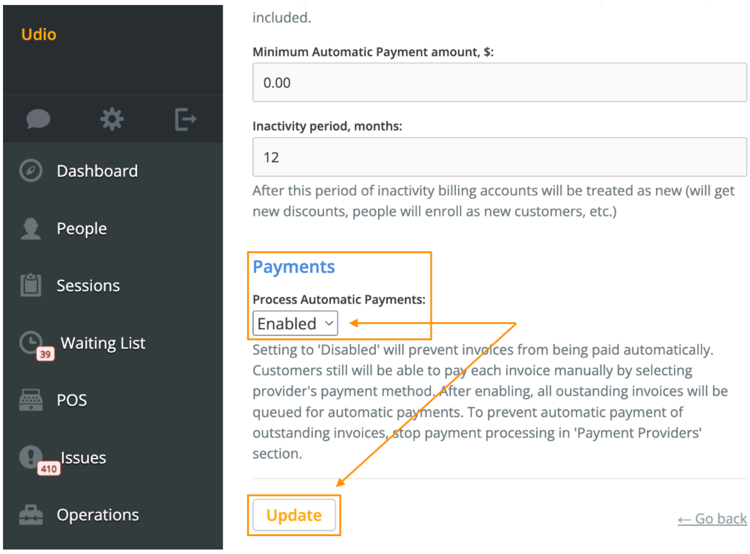


- **Disable automatic payments**

Before you roll the next term over, it's a good idea to disable automatic payments so you can conduct a few checks on accounts to ensure bookings and fees are correct.

- In 'Settings', scroll down to 'Account' and click *'General Settings'*
- Under 'Payments', change 'Process Automatic Payments' to *'Disabled'* and click *'Update'*

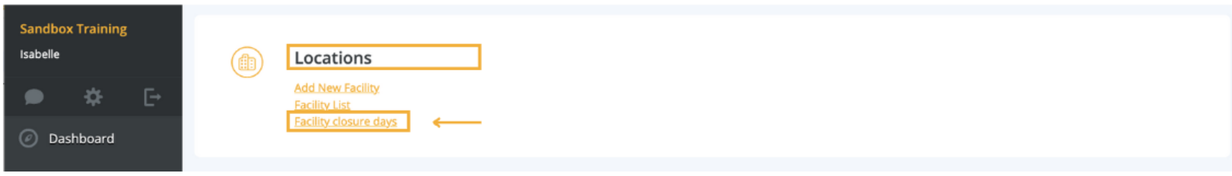


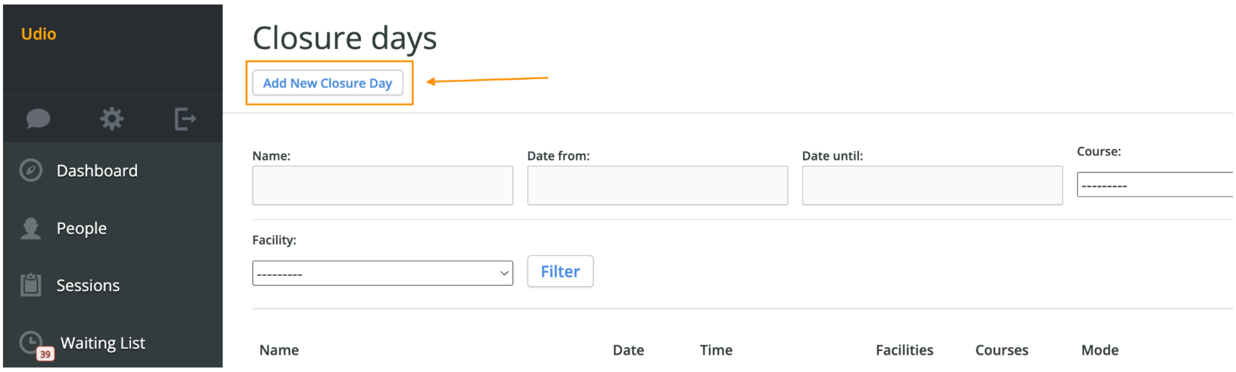


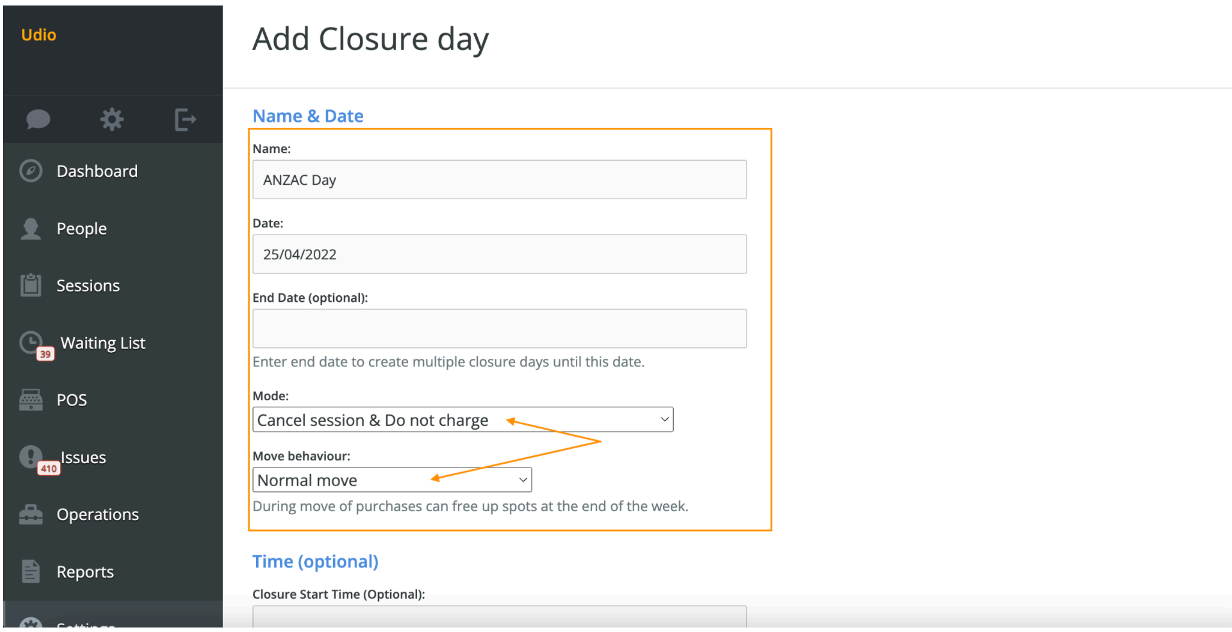
- **Add facility closure dates**

Ensure that customers are charged correctly when there is a closure day. To add closure dates:

- Go to ‘Settings’ and under ‘Facilities’, select *‘Configure facility closure days’*
- Click *‘Add New Closure Day’*
- Add the name of the closure (such as ANZAC Day) and the date plus end date if it’s multiple days (such as Easter Weekend)
- Set the ‘Mode’ to *‘Cancel session & do not charge’*
- Under ‘Move behaviour’, select *‘Normal move’*
- Add a time (optional) and select your facilities and courses
- Add a description (optional) and click *‘Confirm’*



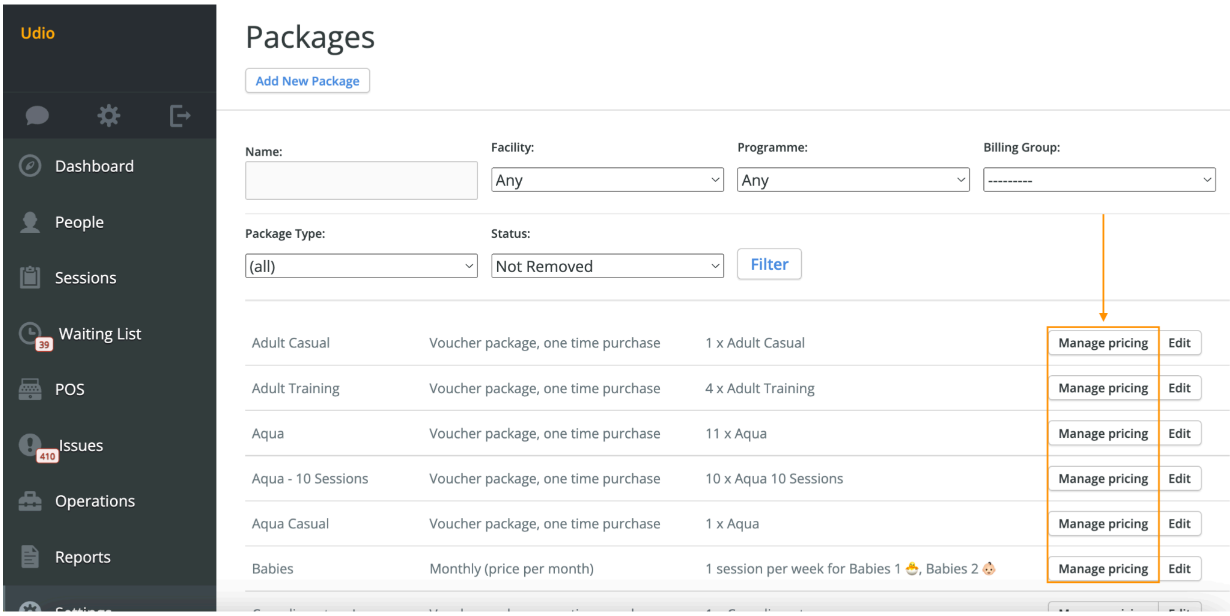


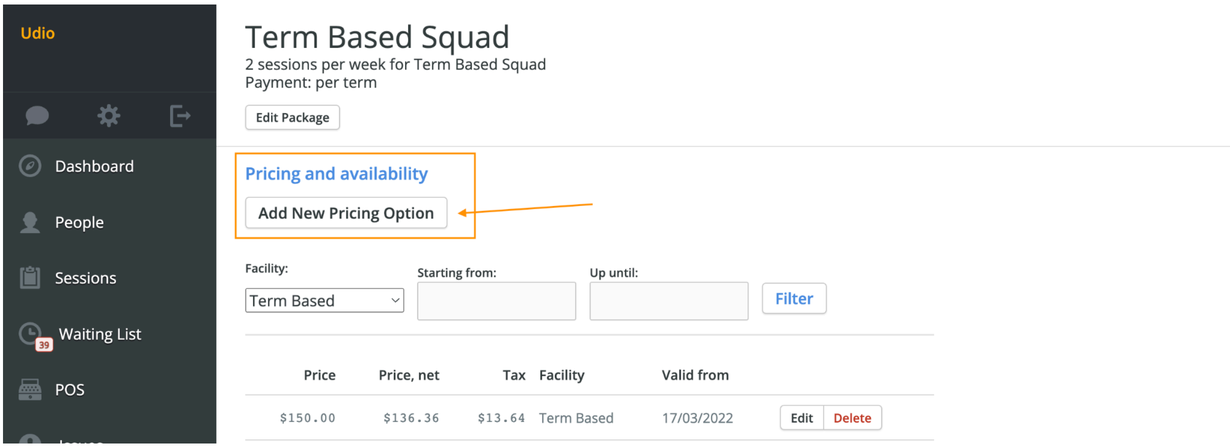


- **Update pricing**

If you are increasing your fees for the next term, you need to update your pricing prior to rolling over the term.

- In 'Settings', scroll to 'Packages & Purchasing' and click *'Configure packages, pricing, and availability'*
- Next to each package, click *'Manage pricing'*
- Click the *'Add New Pricing Option'* button (do not delete previous and current pricing)
- Fill in the fields with your new pricing and click *'Confirm'*
- Repeat for all packages

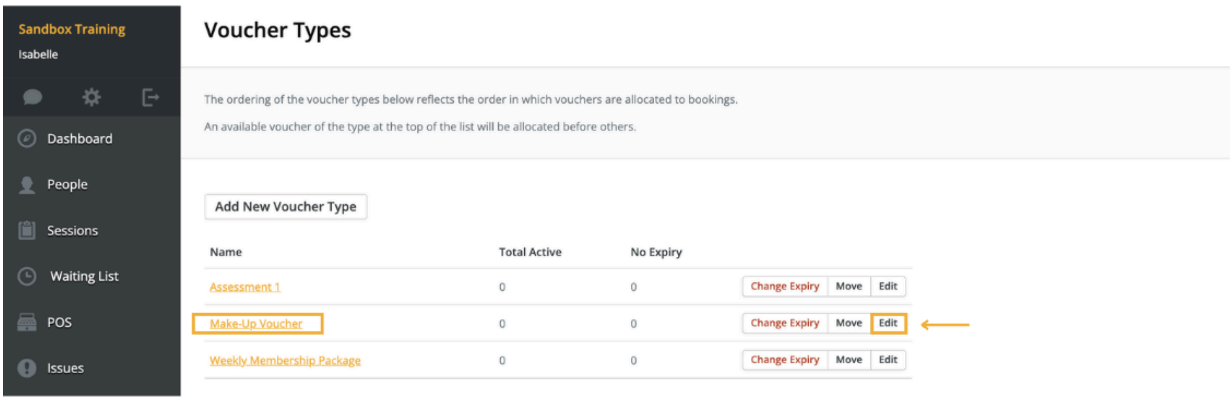


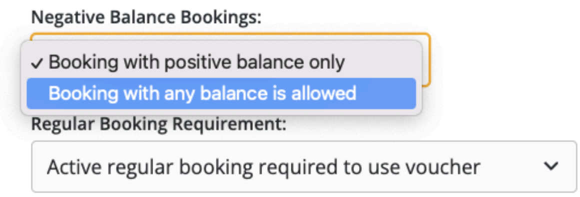


- **Update Make Voucher to allow makes ups with a negative balance**

Once you have rolled over your term, your customers can book make ups in the Portal even if they have a negative balance.

- In 'Settings', scroll to 'Packages & Purchasing' and click *'voucher types', 'make up'*
- Next to each package, click *'Edit'*
- Update the Negative Balance Bookings to '*Booking with any balance is allowed'*
- Click *'Confirm'*





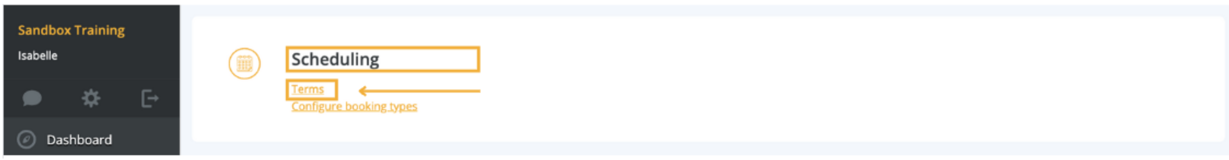
- **Create the new term**

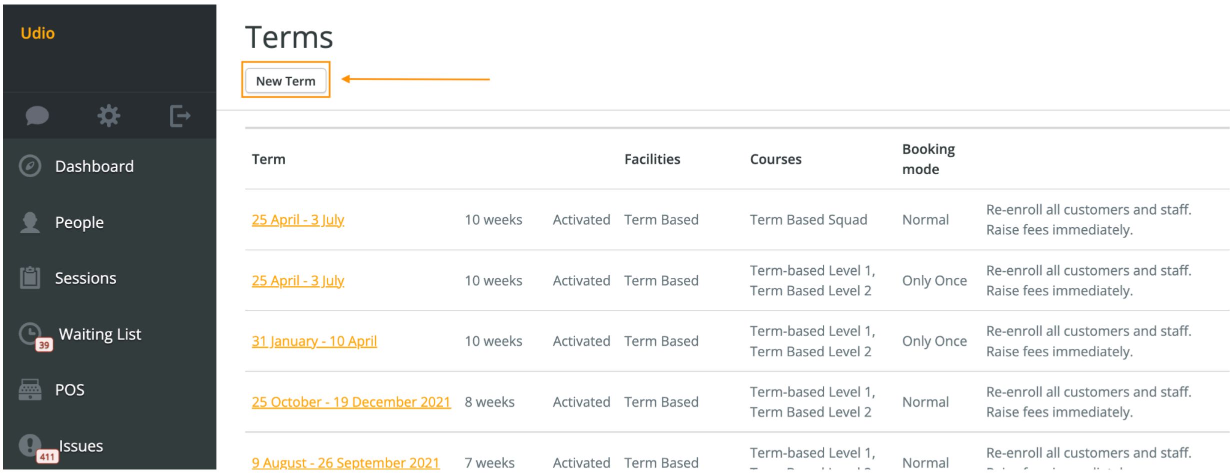
You can now create your new term. We recommend only creating the next term - don't add any more.

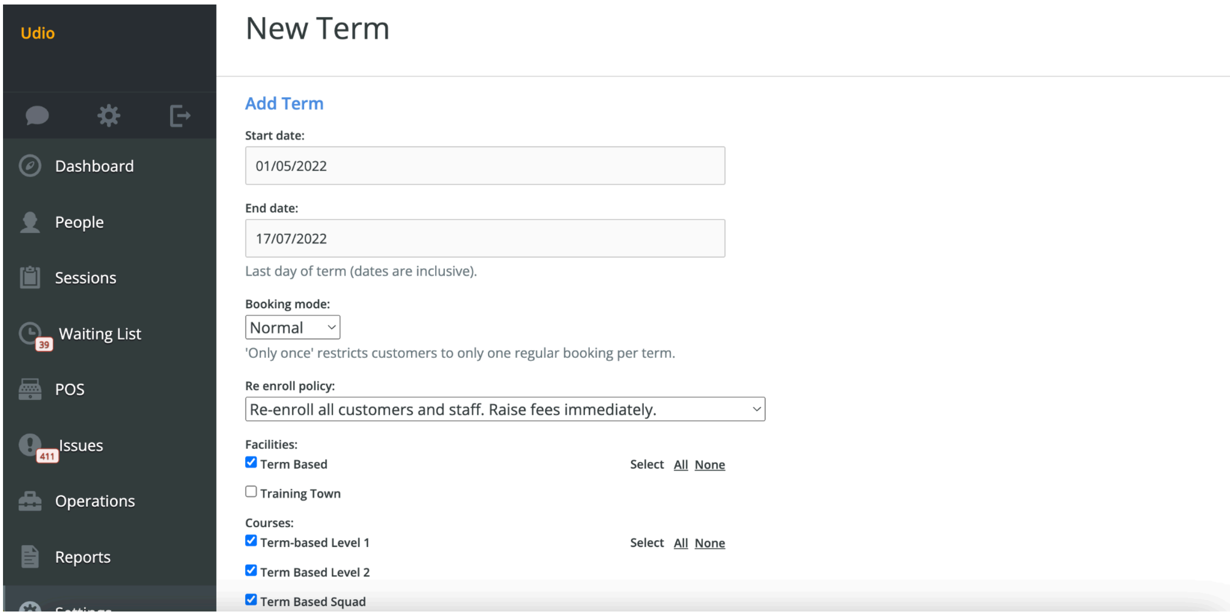
- Go to 'Settings' and under 'Scheduling' select *'Terms'*
- Click *'New Term'*
- Add the start date of the term
- Add the end date and where possible, add the date for the last Sunday even if you don't run lessons
- Under 'Re-enroll policy', select the relevant one for your business from the options below:
    - Re-enroll all customers and staff. Raise fees on the first day of term.
    - Re-enroll all customers and staff. Raise fees immediately
    - Re-enroll staff only, cancel all regular bookings for customers
    - Only create sessions, do not re-enroll staff, cancel all regular bookings
    - Do not create sessions for new term. New term starts empty.
- Select facilities and courses
- If you don't want to send automatic notifications DO NOT tick this box. tick this box if you want to send automatic notifications.
- Click *'Confirm'*

Udio will now start the process of rolling the term over, showing a status of pending activation. During this time, you can update the information but **once the term is activated, no changes can be made**.

The activation process can take a few hours to complete.







2. Once term is activated

Once the term has activated, you can make all the necessary changes to the timetable.

2.1 Email customer confirmation

When your timetable is complete, you can notify your customers via email.

Below is a sample template that you can use. To create the email, go to 'Settings' and select *'Email Templates'* under 'Emails & Notifications' followed by *'New Template.'*

Hi {{ person_first_name }}

Term ____ will commence on __________ and we look forward to seeing you then.

We welcome back our returning customers and a big welcome to our new ones. If you haven't already, please sign up to our customer portal where you can view and manage your account {{ customer_accounts_signup_link }}

Here is your booking information:
{{ billingaccount_upcoming_bookings }}

((Add any other information required for the term))

Regards,

{{ account }}

2.2 Remember to update the following

Once you've completed the above and your new term is activated, remember to re-enable the following:

- Move bookings
- Online bookings
- Automatic payments
- Customer accounts mode to 'Customer Portal is enabled and available'
- Make Up mode back to 'Booking with positive balance only'