Social Planet

Getting Started Quick Guide

Love the Local Life

LEGAL NOTICE

www.socialplanet.com.au
info@socialplanet.com.au

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Contents

How to Login and Navigate Social Planet

Logging In

1. Go to https://www.socialplanet.com.au/site/login
2. Enter username and password.
3. You will be taken to the **Frontdesk**, your homepage.

Navigation

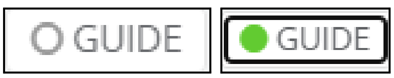
From the Frontdesk, you'll see the **Global Navigation Menu** on the left-hand side of the webpage.

This menu displays all top-level sections of Social Planet, such as –

- Visit home page - View your public facing home page.
- Account - Change organisational settings.
- Clients - View and edit clients.
- Staff - View and edit staff.
- Volunteers - View and edit volunteers.
- Groups - View and edit user groups and membership lists.
- Entities - View membership list
- Activities - Manage activities and classes.
- Venue Hire - Manage your neighbourhood house sites and classrooms.
- Requests - Process front and back-end booking requests.
- Messages - Communicate with clients by SMS/email.
- Notes - Manage client and activity notes.
- Education - Manage ACFE subjects, enrolments, reports and settings.
- Payments - Manage payments, charges and invoices.
- Workload - Assign staff and volunteers to activities and classes.
- Reports - View data and metrics concerning your Neighbourhood House.

Guide

You will see on the top right-hand side of each page or window a guide icon. If you need help, select the guide button and helpful information will be displayed.



How to Set Up Your Organisation's Account

To change key information about your neighbourhood, click **Settings**, under the **Accounts** header. Here, you'll find six tabs –

- **General** – organisational contact and address details.
- **Requests** – information requested of participants and sent to staff.
- **Hires** – the declarations and policies for venue hire.
- **Policies** – the declarations / statements that participants abide by.
- **Finance** – the bank account and payment settings.
- **Education** – the organisation and VET settings.

General

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **General** tab, click **Edit** on the **Basic Info** tab to change key information, such as –
    - Name
    - ABN/ACN
    - Contact Details
    - Website
    - Teaser, Description
    - Address
    - Main Image
    - Programme Brochure/Calendar
3. Click **Edit** on the **Affiliations and associations** tab to add icons for Learn Local, NDIS and Neighbourhood Houses on your landing and activity pages.
4. Click **Edit** on the **NDIS settings** to add your NDIS registration number.

Booking Request Settings

Here's how to set up a staff member's email so they can be notified when an online booking is made.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Requests** tab, click **+Add** on the **Booking Request Settings** tab to open the **Add Booking Notification** window.
3. Enter the staff member's email.
4. Press **Add**.

How to Add Additional Booking Fields

Need participants to complete extra fields when making a booking? Here's how to set it up.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Requests** tab, click **+Add** on **Supplementary Information Form** to open the **Add Booking Supplement** window.
3. Follow the How to Create and Assign a Supplementary Information Form tutorial to complete the content fields.

Policies

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Policies** tab, click **+Add** on the windows listed below to add relevant policies –
    - Terms and Conditions
    - Cancellation and Refund Policies
    - Venue Hire Policies
    - Client Declarations
    - Privacy Policies
3. Follow the How to Add Privacy, Information and Declaration Statements tutorial to complete the content fields.

Finance

Bank Account

Social Planet uses Pin Payments as its financial gateway for online credit card bookings. Here's how to add your bank details for fund transfers. (Only the account owner may edit this section.)

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Finance** tab, click **Edit** on the **Bank Account Settings** panel to open the **Edit Bank Settings** window. Here, you can add –
    - Account Name
    - BSB Number
    - Account Number

Invoicing

Social Planet has invoicing as a payment method for activities. If you want to use invoicing, it's essential to add an invoice number and your bank account details.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Finance** tab, click **Edit** on the **Invoice settings** tab to open the **Edit Invoice Settings** window. Here, you can –
    - Invoice Number Prefix
    - Invoice Number Suffix
    - Invoice Number
    - Invoice Number Padding
    - Number of days before due
    - Payment Info text - including bank details
    - Checkbox - Show Unit Qty and Unit Amount on invoices

Notifications

Here's how to alert key-staff when invoices and receipts have been issued, and when fund transfers are made from Social Planet's bank to your provider bank account.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Finance** tab, click **Edit** on the **Notification settings** panel to open the **Edit Notification settings** window. Here, you can add –
    - **Email** to send a copy of invoices to.
    - **Email** to send a copy of receipts to.
    - Point-of-contact regarding payments or credit card charges.
    - Point-of-contact for fund transfer requests.
3. Press **Save**.

Accounting Codes

Through Social Planet, you can add accounting codes to be applied to income and expenditure items in the general ledger.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Finance** tab, click **+Add** on the **Accounting Codes** panel to open the **Add Accounting Code** window. Here, you can add –
    - **Code**
    - **Accounting Code Name**
3. Click **Add**.

MYOB Settings

If using MYOB as your accounting software, configure Social Planet to export the Customer Card CSV and Service Sale CSV files from our general ledger.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. On the **Finance** tab, click **Edit** on the **MYOB Settings** panel to open the **Edit MYOB Settings** window. Here, you can –
    - Enable MYOB functions
    - Terms - Balance Due Days
    - Referral Source
    - Journal Memo Prefix
    - Customer Card ID Prefix
3. Click **Save**.

How to Add Privacy, Information and Declaration Statements

Declarations are statements that a client agrees to when attending your activities. These declarations are displayed as part of the online booking process. For example, you may want to add a privacy declaration for prospective users to consent to through a checkbox, something like –

“We respect that any information collected will be held in accordance with information privacy laws and the Neighbourhood House Privacy Policy. Please ask if you require further information.”

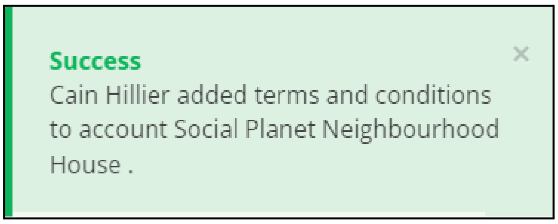
You can create multiple types of declarations depending on the organisational needs of your classes and events.

1. From the **Frontdesk**, find the **Account** header and click **Settings**.
2. Click the **Policies** tab, click **+Add** for one of the following panels –
   - Terms and Conditions
   - Cancellation and Refund Policies
   - Venue Hire Policies
   - Privacy Policies
3. The Add Policy window will be open, here, you can add –
   - Policy Name
   - Statement, with requisite formatting
4. Click **Add**, the policy will now displayed in the relevant policy panel, where you can **Edit** or **Delete (X)**.

System Notifications – A Quick Guide

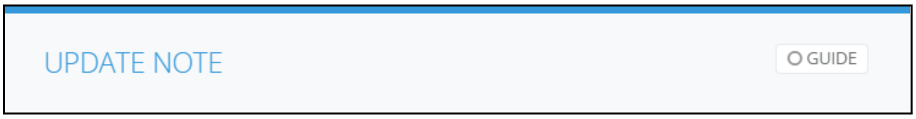
Social Planet keeps you informed about the actions you take within the platform.

1. When you create a change or enter information in new information within a field and press Save. The system saves the change and logs/timestamps the change, and the following notification will appear.

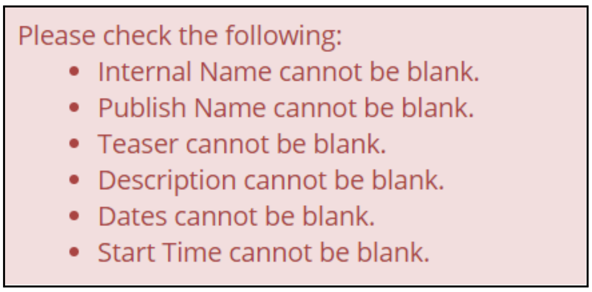


2. When entering *new* information into the system, the section name and outline will be green.

3. When editing *existing* information, the section name and outline will be blue.



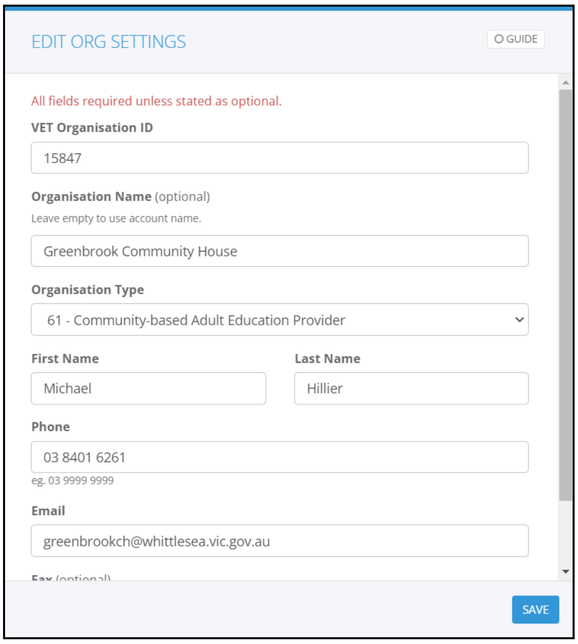
4. Information will *not be saved* if you use your mouse cursor and click outside the dialog box. Information will *only* be saved if you click **Save** or **Add**.
5. Error messages will be displayed when the entered data is incomplete or incorrect. For instance, when creating an activity, if you don't enter information in key mandatory fields, the following message type will appear.



How to Setup an ACFE Account for AVETMISS Reporting

If you are a Learn Local or ACFE provider, you need to first organise your account, as it's essential for AVETMISS reporting.

1. From the **Frontdesk**, find the **Education** header and click **Settings**.
2. Click **Edit** on the **Org Settings** panel to open the **Edit Org Settings** window. Here, you can add or edit your –
    - VET Organisation ID
    - Organisation Name
    - Organisation Type
    - Staff member point-of-contact for VET matters, including phone, email or fax number.



3. Click **Update**.

Create a Delivery Location

Delivery locations are the places where the ACFE training is conducted.

1. From the **Frontdesk**, find the **Education** header and click **Settings**.
2. Click **+Add** on the **Delivery Locations** panel to open the **Add Location** window. Here, add your –
    - Location Name
    - Location ID
    - Street Address
    - Checkbox - Active Status

3. Click **Add**.

Create a Class Location Address linked to a VET Location ID

1. From the **Frontdesk**, find the **Venue Hire** header and click **Sites and Spaces.**
2. Click **+Add Site** to open the **Add Site** window. Here, you can add –
   - Name
   - Reference Code
   - Description
   - Street Address

1. Go to **Main Menu**, select **Activities**, then select **Locations**, click on **+ Add Location**
2. Add Location information,
3. Then **tick This location should be included in VET reporting**
4. The **VET Delivery Location** will be displayed, use the drop-down list to assign the **VET Settings Location.**
5. **Tick - Use this location as the default when creating an activity** then press **Add.**

How to Create a Venue Location and Activity Contacts

Before you create your first activity on Social Planet, you need to add the site where events will be held, the spaces *within* this site and the contact details of the person handling booking enquiries. You can add as many sites, spaces and contacts as your service needs.

Adding a Site

1. From the **Frontdesk**, head to the **Venue Hire** header, click **Sites and Spaces**.
2. Click **+Add site** to open the **Add Site** window. Here, add your site's –
   - Name
   - Reference Code
   - Description
   - Address
3. Click **Add**.

Add Spaces to the Site

1. Once the site is created, click **Actions** on the site tile, and select **Add space** to open the **Add Space** window. Here, you can add –
   - Site Name
   - Reference Code
   - Description
   - Location Type
   - Checkbox - Same address as the site
   - Checkbox - Link to VET location (if ACFE related)
   - Checkbox - Is a virtual location
2. If you wish to allocate a colour to the space, click the arrow next to **Aquamarine**.
3. Click **Add**.

Adding Contact

1. From the **Frontdesk**, find the **Activities** header and click **Contacts.**
2. Click **+Add contact** to open the **Add Contact** window. Here, you can add –
   - Name
   - Contact Details
   - Checkbox – Use this contact as the default when creating an activity
3. Click **Add**.

How to Create and Assign a Supplementary Information Form

It’s essential to collect participant data for completing government reports, grant-writing and conducting program evaluations. Doing this through Social Planet reduces the need for paper-based non-ACFE enrollment forms, and can be done from the outset of booking.

1. From the **Frontdesk**, click the **Accounts** header, then **Settings**.
2. Click the **Requests** tab, then **+Add** on the **Supplementary Info Form** panel to open the **Add Booking Supplement** window. Here, you can add –
    - Name
    - Description
    - Include additional fields from the profile you would like a participant to include in their booking.
3. The additional fields you can require from participants include
    - **Contact** – If you want participants to assign an emergency contact.
    - **Disability** – If you want participants to provide disability/medical info.
    - **Gender** – If you want participants to identify their gender.
    - **First Nation Enabled** – If you want participants to identify their Indigenous and Torres Strait Islander status.
    - **Age Enabled** – If you want participants to identify their age.
    - **Country of Birth Enabled** – If you want participants to identify their country of birth.
    - **Language Enabled** – If you want participants to identify their primary spoken language.
4. Click **Add**.

Now, you need to assign the Supplementary Info Form to your chosen activity.

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Click **Edit** on the **Booking Settings** panel, this will open the **Update Booking Settings** window. Here, you should –
    - Change **Booking Process Type** to **Simple Booking**
    - Choose your desired form from **Include Supplementary Information Form**
3. Click **Save**.

Note – To activate the form, the activity must be the Simple Booking type.

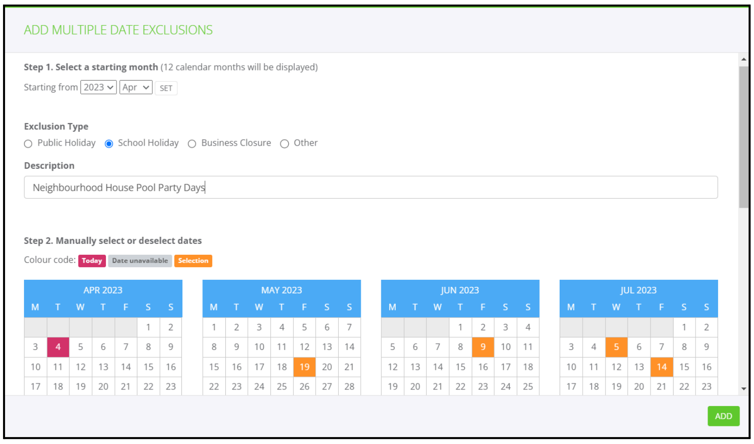
How to Create a Centre Availability Calendar

Add your centre’s closing periods to an availability calendar to ensure you aren’t delivering courses when your centre is closed.

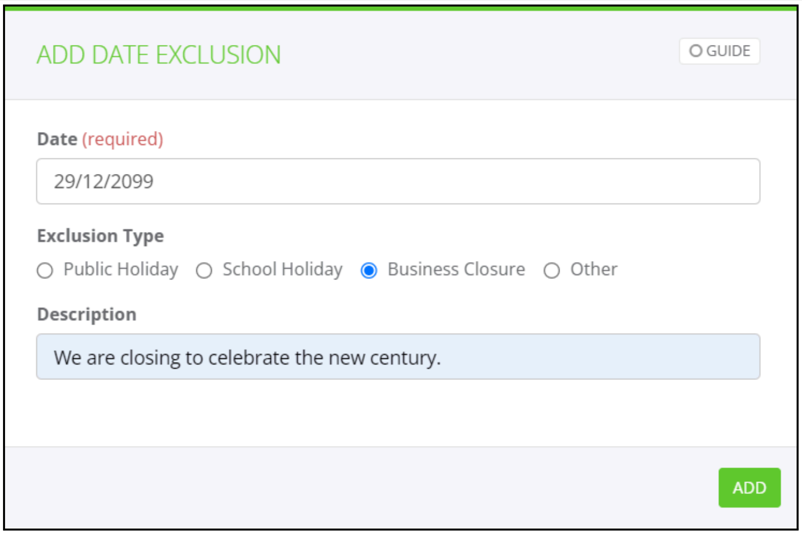
1. From the **Frontdesk**, go to the **Account** header, select **Calendar**.

Here, you’ll see the **System Date Exclusions** on the left-hand panel, which shows all the system-excluded public holiday dates. To create a custom date exclusion –

2. On the **Custom Date Exclusion** panel, click either –
    - **+Add** to add individual closed dates.
    - **+Add multi** to exclude a block of dates, such as school holidays.
3. Clicking **+Add Multi** will open the **Add Multiple Exclusion Dates** window. Here, you can –
    - Select a **starting month.**
    - Select an **Exclusion Type.**
    - Manually select or deselect dates.



4. Clicking **+Add** will open the **Date Exclusion** window. Here, you can add –
    - **Date**
    - Select an **Exclusion Type**
    - **Description**

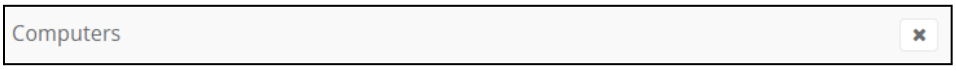

ADD DATE EXCLUSION
GUIDE
Date (required)
29/12/2099
Exclusion Type
Public Holiday
School Holiday
Business Closure
Other
Description
We are closing to celebrate the new century.
ADD

How to Setup a Tag Management System

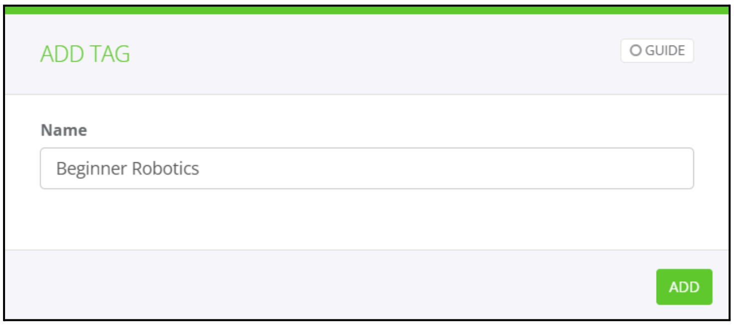
With Social Planet's tag management system, you can keep your activities, staff, volunteers and client lists organised and manageable. Tags make it easier for staff and clients to search for key info.

1. From the **Frontdesk**, go to the **Account** header, select **Tags**.
2. The key **Tag Lists** for first time users to review are –
    - Activity Category – the broad groupings of category i.e Yoga,
    - User Interest – specific groupings within a category i.e Hatha Yoga,
    - How did you hear about us? – the reasons clients booked your activity,
    - Counter Category – the types of individual services provided at the centre.
3. Select a **Tag List** to open the tag list page. There will be two panels
    - **System Tags** – These are preloaded tags applicable to nearly all neighbourhood houses.
    - **Custom Tags** – Tags which are added manually by neighbourhood house staff.
4. To add a **system tag** to the **custom tag** table, click the **<** button on the left-hand of the **system tag**.

5. To delete a **custom tag**, click the **X** button on the right-hand side of the tag.



6. To create a **custom tag**, click **+Add** on the **Custom Tags** panel. Fill out the name in the **Add Tag** window and click **Add**.



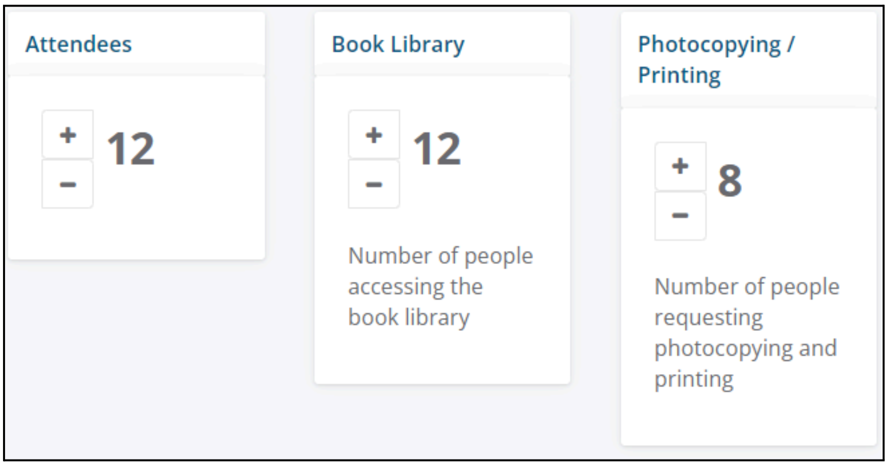
How to Setup Counters to Record the Individual Services Your Centre Has Provided

If you want to record specific services you're providing to individuals, such as Centrelink assistance, free wifi or photocopy, set up a counter system. Here's how –

1. From the **Frontdesk**, go to the **Account** header, select **Counters**.
2. Select **+Add counter** to open the **Add Counter** window. Here, you can add –
    - Name
    - Description
    - Category (or add a new category)
    - Checkbox – Is Active
    - Checkbox – Show on dashboard
3. Click **Add**.

Once you've created a counter it will be displayed as a monthly calendar from *January – December*, so you can view the number of service instances.

1. Under the **Account** header, click **Frontdesk**. All counters will be displayed under **Services**.
2. Click **+** or **-** to add or subtract a service.



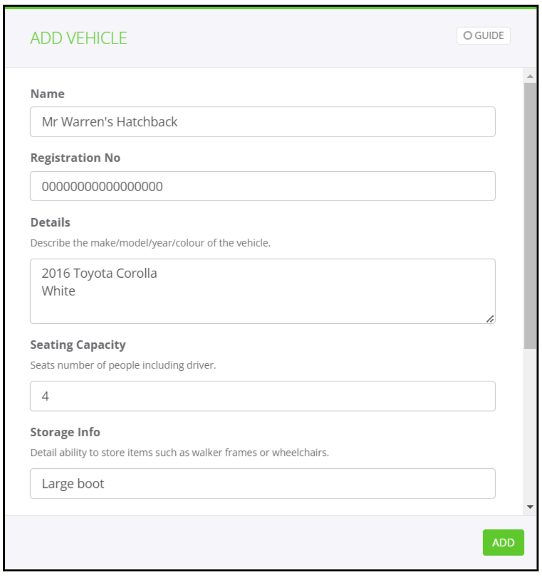
3. Click the **Counters** tab to view service usage.

How to Add Vehicles to Your Organisation

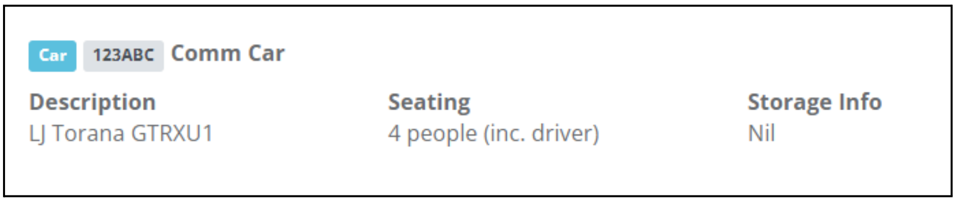
To transport participants, you need to have vehicles registered in Social Planet, you can assign participants to these vehicles as passengers.

Here's how to register a vehicle –

1. From the **Frontdesk**, head to the **Account** header, select **Vehicles**.
2. Click **+ADD VEHICLE**. This will open the **Add Vehicle** window. Here, fill out the –
    - Vehicle Type
    - Name
    - Registration
    - Car Details
    - Seating Capacity
    - Storage Info
    - Garaged Location



3. Click **Add**, this vehicle will now appear as a vehicle tile.



4. To edit or delete this vehicle, click the **Actions** button on the vehicle tile. Then either **Edit** or **Disable**.

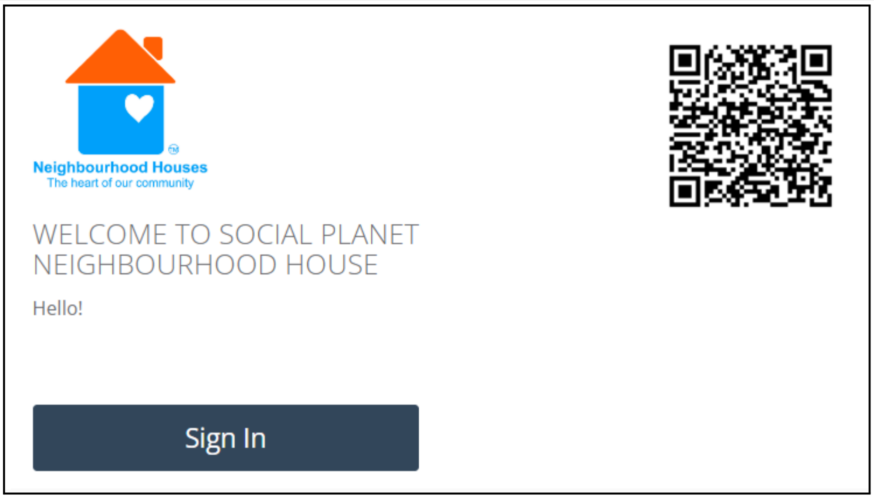
How to Setup an Electronic Visitor's Sign-In Sheet

Social Planet collects the contact details of each visitor to your neighbourhood house, stored as a CSV file. This data can inform you how many visitors your centre has on a daily, weekly or monthly basis, allowing you to measure participation trends. Another benefit is enabling visitors to join your mailing list, which can be migrated directly from MailChimp to CSV.

1. From the **Frontdesk**, head to the **Account** header, select **Sign-In Log**.
2. Click **+Add sign-in log**. This will open the **Add Sign In Log** window. Here, you can add –
    - Sign-in Log Type
    - Name
    - Description
    - Greeting Message
    - Checkbox - Show company/org field
    - Checkbox - Show Reasons
    - Checkbox - Show Newsletter Opt In
    - Checkbox - Enable COVID-19 contact tracing
    - Checkbox - Enable Signing out
    - Checkbox - Send email to person on successful sign in
3. Click **Add**.

Now the guestlist is created, click **Edit** on the guestlist tile to fill open the **Sign-In Log** page, where you can add the relevant information. Here's how –

1. Click **+Add reason** on the **Reasons** panel to **Add Log Reason**, such as Staff Member, Volunteer, Centre Participant and Visiting Professional.
2. If you want visitors to sign in using a **QR Code**, you can click on the **QR code** to display it in a new window.
3. If you'd like visitors to sign-in using an iPad, copy the **Sign-in Form URL** and paste it into a browser. Enter the **Access Code** to display the **Sign-In Form**, seen below.



4. Visitors are required to enter their name and at least one **contact method**, then click **Sign-In**.
5. Visitors will be added to the **Log Entries** panel. Click **CSV Download** if you need to download the log as an excel file.